



## **School Catalog**

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**701-404-9434**

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## **Introduction**

Phlebotomy Training Specialists (hereinafter referred to as PTS) offer phlebotomy training and certification to students and are staffed with qualified, approved instructors.

Brian Treu is PTS's Chief Executive Officer (hereinafter referred to as CEO). Mr. Treu has been drawing blood for 23 years and has completed over 300,000 blood draws during his career. His medical career includes completing 255 clinical research trials in Phases I-IV in all facets of medicine, specializing in Phase I clinical trials. Mr. Treu loves pressure and has an uncanny way of dealing with stressful situations. He has traveled the world performing venipuncture on patients on all seven continents.

Alexis Treu is PTS's Chief Operations Officer (hereinafter referred to as COO). She has broad experience at this level and has served in this capacity since 2017. Her extensive understanding of career school operational functions and diverse and complicated state licensure requirements enables her to ensure full program compliance across the country.

David Roberts is the Chief Financial Officer (hereinafter referred to as CFO). Mr. Roberts's responsibility is to ensure the company operates according to the generally accepted accounting principles (GAAP). He coordinates and manages all finance functions within the company and manages operational and investor relationships to ensure the company is operating legally and ethically. Mr. Roberts has an extensive background in supporting companies through post-sale transactions, ensuring smooth and efficient operations. He has been a CFO for ten years. Before his CFO duties, he held numerous senior-level positions in financial planning and analysis (FP&A) roles and back-office controllership roles. He has an undergraduate degree in finance and a Master's in Business Administration (Finance) from the University of Utah.

Dina Said Dwyer is Acting Chair of PTS and is the CEO and President of Eden PTS Holdco LLC. Ms. Dwyer has spent over 20 years in the private equity industry. Prior to founding Eden Capital, she served as a Managing Director at Unifund SA, as an Analyst at the Blackstone Group in New York, and trained at the Carlyle Group in London. She currently sits on the Board of Directors of Wall Street Prep, Etcetera, and White Cup. Ms. Dwyer is a graduate of the Wharton School of the University of Pennsylvania and received her MBA at the Columbia Business School.

## **School History**

Phlebotomy Training Specialists (hereinafter referred to as the School) offers Phlebotomy Training for students and is staffed with qualified instructors. Mr. Treu recognized a need in the phlebotomy industry for hands-on training, so he founded Phlebotomy Training Specialists and created a program to combine a system that consists of both practical and didactic learning. Students can leave the program feeling confident in their ability to enter the workforce as phlebotomists. Since Phlebotomy Training Specialists' inaugural class in 1993, the company has had over 87,000 graduates. Today, Phlebotomy Training Specialists is one of the largest stand-alone phlebotomy training schools.

## **Mission and Objectives**

Our mission is to increase the quality of the patient experience in the laboratory setting by delivering and implementing standardized and consistently updated training methodologies to students before their entrance into the clinical setting through our network of training facilities, which use the latest training paradigms and state-of-the-art equipment.

Our objective is to turn out high-quality, well-trained, competent phlebotomists who can use their skills to benefit patients and employers.

Our current program meets the stated purpose above through a rigorous academic curriculum and hands-on training. Our program equips students with the knowledge, technical proficiency, and foundation needed to excel. By preparing our students to provide safe, accurate, and compassionate blood collection draws, the program fulfills our mission.

## **Administration**

Brian Treu – CEO & Owner

Alexis Treu – COO / School Director

David Roberts – CFO

Monica Sanborn – VP of Licensing and Compliance

Heidi Samani – Student Services Manager

Ericha Dick – Director of Training

Nitza Magaly Lopez – Campus Director / Instructor

## **Contact Information**

### **School Addresses:**

**Glastonbury** - 148 Eastern Blvd, 2nd Floor, Suite 202, Glastonbury, CT 06033

**Home Office**- 1971 W. 700 N. Suite 102 Lindon, UT 84042

Phone: **701-404-9434**      Fax: **385-327-2084**

Email: [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com)      Website: [www.phlebotomyusa.com](http://www.phlebotomyusa.com)

## **Programs Offered**

1 Certificate Program:

80-Clock Hours Phlebotomy Training

## **Program Cost**

<b><u>Tuition</u></b>	<b><u>Registration</u></b>	<b><u>Supplies/ Equipment</u></b>	<b><u>E-book</u></b>	<b><u>Workbook</u></b>	<b><u>Total Tuition/Fee</u></b>	<b><u>National Exam</u></b>
\$1020.00	\$150.00 (NON-REFUNDABLE AFTER 3 BUSINESS DAYS)	\$115.00	\$35.00	\$45.00	\$1365.00	\$130.00 (Paid to a third party)

**Total for Phlebotomy Training Program & Exam = \$1495.00**

## **Payment Policy**

Class tuition and fees can be paid by logging onto the student account at [students.phlebotomyusa.com](http://students.phlebotomyusa.com). We accept all major credit cards for payment. A minimum payment of \$150 is required at the time of registration. After the initial registration fee of \$150 has been paid, students can make payments in any increment until full payment is received. Full tuition and fees are due by the halfway point of classes.

If a student fails to pay full tuition and fees by these deadlines, the following options are available:

1. If a student wishes to remain in the class they originally registered for and are unable to meet the payment policy as written, they can request a payment extension. They will need to make a written request to the school's Director at [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com). They will review all payment extensions. If an extension is approved, the student will remain in their scheduled program but will be required to pay in full before challenging the practical or national exam.
2. If a student does not contact the Director, they will be withdrawn and required to reenroll in new class dates. They will attend the remaining classes in that cohort to complete their program. They will be required to be paid in full before joining their new cohort. Extensions past this point will not be permitted. Students should call Student Services to reschedule. Please note rescheduling will be based on class availability.

No student will receive their certificate of completion without full payment, regardless of circumstance. PTS does not hold regional, national, or programmatic accreditation from a U.S. Department of Education-approved accreditor. PTS does not participate in federal or state student aid programs.

### **Financing Options**

Students may apply for financing with Monterey Financial via the student portal upon request. Students may apply for financing at any point throughout the program, and they may choose to finance up to 50% of their overall balance. Students may select terms in 12, 18, or 24 months at a rate of 18%. Should students withdraw from the program, the published refund policy would apply.

Third-party loans must be repaid according to the terms of the note even if the borrower does not complete his or her education, cannot get a job after completion of the program, or is dissatisfied with the education.

### **Student Loans**

Phlebotomy Training Specialists do not qualify for Title IV student loans and do not provide student loans.

### **Exam Fee**

Refundable if not taken. If a student chooses to test, the fee will be charged as a separate transaction by the school through the National Testing Agency's Merchant Account, and students will not be required to pay this fee until they have successfully enrolled in the training program and classes have commenced.

### **Supplies & Equipment**

**Supplies:** \$60.00 – Refundable on a pro-rata basis along with tuition.

**Equipment:** \$55 – Refundable on a pro-rata basis along with tuition.

**Workbook:** \$45 – Once the workbook is issued and received by students, these become the property of students and become non-refundable.

**E-book:** \$35 – Once the e-book is issued and received by students, these become the property of students and become non-refundable.

## **Class Schedule**

**Day:** 9 am to 1:00 pm – Monday – Thursday (20 Classes)

**Evening:** 6 pm to 10 pm – Monday – Thursday (20 Classes)

**Weekend:** 8 am – 4:30 pm Saturdays (10 Classes)

### **2025 Class Dates and Application Deadline**

<b>Month / Class</b>	<b>Dates of each Class</b>	<b>Application Deadline</b>
<b>June Day</b>	16, 17, 18, 20, 23, 24, 25, 26, 27, 30, Jul 1, 2, 7, 8, 9, 10, 11, 14, 15, 16	6/9
<b>June Eve</b>	16, 17, 18, 20, 23, 24, 25, 26, 27, 30, Jul 1, 2, 7, 8, 9, 10, 11, 14, 15, 16	6/9
<b>Jul / Aug / Sept Weekend</b>	12, 19, 26, Aug 9, 16, 23, Sept 6, 13, 20, 27	7/7
<b>July Day</b>	21, 22, 23, 24, 25, 28, 29, 30, 31, Aug 1, 4, 5, 6, 7, 8, 11, 12, 13, 14, 15	7/14
<b>July Eve</b>	21, 22, 23, 24, 25, 28, 29, 30, 31, Aug 1, 4, 5, 6, 7, 8, 11, 12, 13, 14, 15	7/14
<b>August Day</b>	20, 21, 22, 25, 26, 27, 28, Sept 2, 3, 4, 5, 8, 9, 10, 11, 12, 15, 16, 17, 18	8/13
<b>August Eve</b>	20, 21, 22, 25, 26, 27, 28, Sept 2, 3, 4, 5, 8, 9, 10, 11, 12, 15, 16, 17, 18	8/13
<b>Sept Day</b>	24, 25, 26, 29, 30, Oct 1, 2, 3, 6, 7, 8, 9, 10, 14, 15, 16, 17, 20, 21, 22	9/17
<b>Sept Eve</b>	24, 25, 26, 29, 30, Oct 1, 2, 3, 6, 7, 8, 9, 10, 14, 15, 16, 17, 20, 21, 22	9/17
<b>Oct / Nov / Dec Weekend</b>	11, 18, 25, Nov 1, 8, 15, 22, Dec 6, 13, 20	10/6
<b>Oct Day</b>	27, 28, 29, 30, Nov 3, 4, 5, 6, 7, 10, 12, 13, 14, 17, 18, 19, 20, 21, 24, 25	10/20
<b>Oct Eve</b>	27, 28, 29, 30, Nov 3, 4, 5, 6, 7, 10, 12, 13, 14, 17, 18, 19, 20, 21, 24, 25	10/20
<b>Accelerated Dec Day</b>	1, 2, 3, 4, 5, 8, 9, 10, 11, 12	11/21



When an unexpected closure occurs due to extraordinary conditions, including inclement weather, students will be notified as soon as possible by phone call and text message. Classes are not held on the following holidays:

- New Year's Eve
- Labor Day
- New Year's Day
- Thanksgiving Day & the Friday following
- Memorial Day
- Christmas Eve / Day
- Independence Day

## **Entrance Requirements**

The school does not discriminate based on race, sexual orientation, gender identity, religion, ethnic origin, or disability.

Students are required to have a high school diploma or GED as a minimum entry requirement into the program. If this proof of education was issued outside of the United States, students must have their documents evaluated for equivalency by a recognized provider such as [naces.org](http://naces.org), [scholar.com](http://scholar.com), or [wes.org](http://wes.org). Some employers may also require similar proof for employment and it will be the student's responsibility to comply with employer requirements. We also require students to be beyond the age of compulsory high school attendance.

Students must demonstrate fluency in English, including the ability to communicate, write, and read fluently, as this is essential for effective communication in the healthcare environment.

We do not require students to have previous medical experience or knowledge. Immunizations are not required to take the program. An informal interview will be given to discuss student goals and expectations. Prospective students will need to enroll by the application deadline. The application can be accessed on our website at [www.PhlebotomyUSA.com](http://www.PhlebotomyUSA.com). The application for attendance will be processed within five (5) business days of submission, and the student will be notified by email.

Although basic computer skills are not required for the program, students are highly encouraged to have basic computer skills before coming to class to make them more competitive candidates for employment upon completion of the program.

## **Admission Application and Deadline**

Prospective students will need to enroll by the application deadline. The application deadline is five (5) days before the class starts. The application can be accessed on our website at [www.PhlebotomyUSA.com](http://www.PhlebotomyUSA.com). The application for attendance will be processed within 5 business days of submission, and the student will be notified by email. Late enrollments are not accepted once the program has begun, and students will be notified and given dates of upcoming classes to choose from.

## **Postponement of Start Date**

Postponement of a starting date requires a written agreement signed by the student and the school. The agreement must set forth:

- a. Reason for postponement request.
- b. A deadline for the new start date.

If the program has not commenced, or the student fails to attend by the new start date outlined in the agreement, the student will be entitled to a full refund of prepaid tuition and fees except for the \$150 non-refundable registration fee. All refunds will be processed within 30 days of the deadline of the new start date, determined in accordance with the school's refund policy.

## **Attendance Requirements**

Attendance is important for all students, regardless of their current level of knowledge. A lack of attendance can affect a student's ability to pass. The program is comprised of 20 four-hour modules completed. To complete the class and receive a certificate of completion, students must complete at least 18 out of 20 modules. If a student misses more than two (2) modules throughout the class, they will be required to make up the modules they missed in an alternate schedule. If students miss three consecutive modules, they will be deemed too far behind the class, automatically removed from the class, and will be required to enroll in another schedule.

Please note that modules 1, 2, and 17 are required to complete the program, as these modules contain foundational information (1 & 2) and the practical exam (17).

Time will be quantified at the educational facility electronically, and the student must attend all the time. If a student misses a portion of class after commencement, they can make it up during the day, evening, or weekend schedule.

## **Make-up Time**

Students are strongly advised not to miss class unless necessary. If a student misses a portion of class after the initial 8 hours, the student can make it up at any of the other modules that are teaching the same class during days, evenings, or weekends. Make-up time is available by contacting student services at 701-404-9434 or by emailing [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com). It is the student's responsibility to schedule and attend any make-up time. If the missed module cannot be made up during the scheduled month, the student can schedule a make-up time during the next month the module is being taught. There is no fee for make-up classes. **Please call Student Services at 701-404-9434 to reschedule.**

However, if the student is absent from three (3) or more class sessions without prior notice and authorization, enrollment will be dropped.

## **Rescheduling/Readmittance**

If a student is dropped from the program due to non-payment of tuition and fees by the halfway mark of their scheduled cohort, they will need to contact Student Services at (701) 404-9434 to pay in FULL and reschedule missed classes. Rescheduling will be based on class availability.

## **Scheduled Absence(s)**

If any student has extenuating circumstances and requires an absence, please directly notify and speak with your school director for authorization. Once authorized, the student will be allowed to make up the missed time during the next month when the class covers the missed content with no additional fees.

## **Employment Advisory Services**

Phlebotomy Training Specialists **do not** provide formal placement into employment opportunities. **Placement in a job is not guaranteed or promised to program graduates.** Additionally, factors such as a criminal background or physical limitations are possible barriers to employment. To that end, we do not leave the students to find employment on their own.

### **We do the following for students:**

Market Sectors – We provide each student with a list of local economic sectors that consistently employ phlebotomy technicians. This list of local sectors may include Plasma Centers, Blood Banks, Platelet Donation, Dialysis, Physicians' Offices, Medical Clinics, Laboratories, Hospitals, and Paramedical Examinations, to name a few. We do not provide student referrals to prospective employers or have direct contact with employers regarding current job openings.

Resume Writing – All students are encouraged to send their resumes to our on-staff employment specialist(s) at [careers@intelvio.com](mailto:careers@intelvio.com). The specialist(s) can assist the students with fine-tuning their resume(s) through suggestion(s), possible rewrites, and overall resume etiquette.

Additionally, we have a *Student Helpline* where students can call with questions regarding Phlebotomy Training, the application process, help with interviewing, job sources, and Phlebotomy-related inquiries.

## **Completion Policy**

### **80-hour Didactic & Practical Coursework**

Students will have 120 days to receive their Certificate of Completion from the original course start date (decided at the time of registration). All payments made towards tuition and fees are only applicable to courses held within the dates on their Enrollment Agreement.

### **Completion Timeline for Exam**

Upon the completion of the Didactic portion of the program, students have 30 days to create an account with the NHA for exam registration. Students who fail to register within 30 days will forfeit the \$130 exam fee and be required to pay the NHA directly. This exam must be completed within 90 days after account creation. No extensions for this policy will be given.

### Re-Enrollment Policy

Should students fail to receive their Certificate of Completion during this time frame, they will be required to re-enroll as a new student. No payments made or classes attended will carry over to this new enrollment. Students may re-enroll and make payments via the student portal or by contacting Student Services at (701) 404-9434.

### Extension Policy

Students may request an extension for extenuating circumstances by contacting Student Services at [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com). Extension requests can be made for obtaining their Certificates of Completion. All requests must be sent in writing. Requests for extensions must be submitted prior to the Completion Deadline.

Extensions will be granted for emergency situations such as a severe medical issue, death of a relative, natural disasters, and cases of assault. All balances must be paid in full before extensions will be granted. Extensions are not to exceed more than 30 days of the original completion deadline. No more than one extension will be granted per student.

Automatic Extensions will be granted for:

- a) the school rescheduling program dates past the expiration date of this agreement, and
- b) the school rescheduling program dates past the expiration of the extension period.

All balances must be paid in full before extensions will be granted. Extensions are not to exceed more than 30 days of the original didactic & lab skills deadline. No more than one extension will be granted per student.

## **Progress/Grading Policy**

To remain on track for graduation, students must meet specific progress benchmarks evaluated at the halfway point of the class and again at the end of the program.

### Overall Progress Requirement:

Students must successfully pass at least 70% of the total modules (both Didactic and Practical Lab combined) by the midpoint evaluation to continue in the program.

### Module Breakdown and Grading:

The program consists of two types of modules, each graded on a pass/fail basis:

#### 1. Didactic Modules (12 Total Modules):

**Grading:** Pass/Fail

**Basis for Grade:** Determined by a combination of attendance and active participation in class, discussions related to program topics and objectives

**Feedback:** Instructors will provide ongoing constructive feedback.

#### **Passing Requirements:**

- **Halfway Point:** Students must pass at minimum four (4) of the seven (7) Didactic modules offered by the program's halfway point.
- **End of Program:** Students must pass at minimum six (6) of the twelve (12) total Didactic Modules offered by the end of the program.

## 2. Practical Lab Modules (8 Total Modules):

**Grading:** Pass/Fail

**Basis for Grade:** Determined by scoring 70% or higher on the following Practical Skills evaluations:

- **Venipuncture Evaluation (76 points total)**
- **Butterfly Evaluation (28 points total)**
- **Capillary Evaluation (24 points total)**
- **Final Graduation Evaluation (116 points total)**

**Feedback:** Instructors will provide ongoing constructive feedback.

**Passing Requirements:**

- **Halfway Point:** Students must score 70% or higher on their Venipuncture, Butterfly, and the Capillary evaluations given throughout Practical Lab Modules. These evaluations must be completed before attempting to take the Final Graduation Evaluation.
- **End of Program:** Students must pass the Final Graduation Evaluation conducted on the Practical Skills testing day with a score of 70% or higher. Failing this evaluation results in failing the practical lab component.

### **Practical Skills Evaluations Grading System**

#### **Venipuncture Evaluation**

Grade	Percentage	Points Out of 76
Pass	90%-100%	68-76
Pass	80%-89%	61-67
Pass	70%-79%	53-60
Fail	0%-69%	0-52

#### **Butterfly Evaluation**

Grade	Percentage	Points Out of 28
Pass	90%-100%	26-28
Pass	80%-89%	23-25
Pass	70%-79%	19-22
Fail	0%-69%	0-21

#### **Capillary Evaluation**

Grade	Percentage	Points Out of 24
Pass	90%-100%	22-24
Pass	80%-89%	19-21
Pass	70%-79%	17-18
Fail	0%-69%	0-16

#### **Final Graduation Evaluation**

Grade	Percentage	Points Out of 116
Pass	90%-100%	104-116
Pass	80%-89%	93-103
Pass	70%-79%	81-92
Fail	0%-69%	0-80

## **Graduation and Certificate of Completion Requirements**

Certificates of Completion will ONLY be awarded to students on the last class session who have accomplished the following:

- Completion of Didactic Coursework
- Completion of Lab Coursework
- Passing Scores in Graduation Evaluation
- Completed Student File / Paperwork
- No outstanding payment obligations
- NHA Draw Log showing a minimum of thirty (30) live venipunctures and ten (10) live capillary sticks performed by the student.

Students complete a final practical evaluation during the last hands-on day of the program. The test will include knowledge of tubes, additives, order of draw, and the ability to complete each step in the correct order and without correction. Completion of 4 successful draws (2 arms and 2 hands) is mandatory, along with full attendance and full payment of tuition for graduation. In addition, Students must be able to communicate and demonstrate proficiency in the practice of phlebotomy without assistance. This includes the ability to perform blood draws safely and successfully.

We do not mail original copies of the Certificate of Completion. If the student would like one sent to them, they can have one printed and mailed directly from our Corporate Offices for a fee of \$20.00. Please log on to the student portal to request and pay for the printed and mailed Certificate. If the student notices any mistakes on their Certificate, please email [documents@phlebotomyusa.com](mailto:documents@phlebotomyusa.com).

Students who complete the 80-clock-hour program and pass the exam administered by the National Healthcareer Association will be eligible for employment in all states. Some states, such as California, Louisiana, Nevada, and Washington have additional licensing requirements.

## **Student Performance, Remediation, and Academic Dismissal Policy**

Student Performance: The Phlebotomy Training Program is a fast-paced, often stressful, learning environment that demands a high level of dedication and proficiency. Students are expected to meet all program requirements, including classroom attendance, participation, and the ability to demonstrate proficiency in blood draws.

If a student's performance falls below the expected standards, the institution will initiate a conversation with the student to discuss their challenges and provide guidance on improving their performance.

Remediation: Remedial training is provided if it is found that a student is not progressing. The remediation period is limited to the length of the next class or classes depending on student needs. If the student achieves a cumulative score of 70% on modules, the student will resume with a pass status. Second and final remediation is available if needed. The student must be able to attend the required classes in the next schedule or concurrent schedule to receive additional training and help. Students are allowed to attend the weekend/evening/day classes, free of charge. If a student is unable to complete remediation in the scheduled time, they will consult with the chief administrator regarding re-enrollment options.

Academic Dismissal: If, after reasonable efforts to support the student's success, they continue to fail to meet the program's requirements and remediation required, the institution may be required to dismiss the student from the Phlebotomy Program. Dismissal will be a last resort and will only occur after due consideration of the student's circumstances.

## **Records**

Student records are maintained digitally indefinitely and can be accessed at the school; transcripts are kept permanently. Students have a right to access their records anytime. A student can access records by logging on to their student portal [students.phlebotomyusa.com](https://students.phlebotomyusa.com). Only the student and the school administration have a right to review student records. No outside personnel will be allowed to view records, except for appropriate state regulatory representatives upon request. Student academic, financial, certificates, and transcripts are all electronically maintained.

For a copy of your transcripts, please email a written request to [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com). There is no fee for a copy of your transcript. The school reserves the right to withhold an official transcript if the student's financial obligation to the school is in arrears.

## **Dress Code**

Scrubs are strongly suggested. Closed-toed shoes are mandatory, no sandals or open-toed shoes.

## **Leave of Absence**

Due to the short amount of time required to complete the program, Phlebotomy Training Specialists will not grant students a Leave of Absence. In the case of a prolonged illness or accident, death in the family, or other special circumstances that make attendance impossible or impractical, the student will be required to withdraw from the program. The school will process an appropriate refund following the Refund Policy.

## **Conduct & Dismissal Policy**

If a student is dismissed permanently, the refund policy will be in effect based on the percentage of class attended. The last session of attendance will be the date of dismissal. Students are expected to maintain professional conduct within the classroom. Phlebotomy Training Specialists reserve the right to enact disciplinary procedures (outlined below). The following is a list of enumerating behaviors that are unacceptable in the classroom setting. These examples of impermissible behavior described below are not intended to be an all-inclusive list. Phlebotomy Training Specialists managers have full discretion and any violation of the policies or conduct considered inappropriate or unsatisfactory will be subject to disciplinary action, up to and including dismissal from the program.

1. **Language / Interpersonal Conduct**
  - a. Fighting (verbal, physical, electronic) with or assaulting another individual
  - b. Threatening or intimidating any other individual by any method (verbal, written, electronic, etc.)
  - c. Engaging in any form of harassment (sexual, emotional, etc.)
  - d. Using vulgar language, explicit terms, or profanities
  - e. Discussing sensitive topics such as religion, sexual orientation, gender, racial issues, political affiliation, etc.



2. **Conduct**

- a. Use of cell phone for non-emergencies while in class and/or lab
- b. Continually speaking out of turn or disrupting the flow of class with off-topic discussions
- c. Arriving late to class or leaving early more than twice without prior notification.

3. **Safety**

- a. Failing to abide by safety rules and policies
- b. Refusing to follow the instructor's directions or being insubordinate
- c. Failure to adhere to corrections or guidance given by the instructor
- d. Continued disregard for cleanliness and sanitation protocols

4. **Mental/Physical State**

- a. Showing up to class in improper attire, wearing inappropriate shoes, or generally unkempt
- b. Attending class while under the influence of alcohol, illicit drugs, or any other mind/body-altering substance. (This includes Prescription and/or recreational drugs).

5. **Student Attendance**

- a. Failure to attend the initial eight hours of class
- b. Missing three consecutive courses without prior acknowledgment by the school

6. **Student Eligibility, Accommodations, & Performance**

- a. Failure to meet the performance requirements
- b. Inability to benefit as reviewed by instructional staff, regional, and national directors

7. **Externship Expectations**

- a. Failure to adhere to any of the above OR below-stated
- b. Contacting the site prior to or post Externship without express permission of PTS
- c. Failure to maintain Externship hours (i.e., scheduled breaks, coming late or leaving early)
- d. Breach of confidentiality for patients, doctors, documentation, or procedures
- e. Failure to disclose that they are a Volunteer Student Phlebotomist or performing unsupervised procedures

8. **Automatic Dismissal**

- a. Possessing firearms or any other weapons in the classroom
- b. Illegal Activity of any kind
- c. Using, selling, dispensing, or possessing alcohol, illegal drugs, or narcotics



- on the premises. Recreational drugs are also not permitted on the premises.
- d. Failure to pay full tuition and fees by the program's halfway point.
- e. Falsifying Documentation or signatures
- f. Theft

### **Dismissal Procedures:**

Upon infraction of one of the above expectations, a Phlebotomy Training Specialists staff member will issue a verbal and/or written warning to the student. This is to be considered a corrective plan of action. If the impermissible behavior continues, Phlebotomy Training Specialists will dismiss students from the program. Students who have violated policies outlined in the "Automatic Dismissal" section will be subject to automatic dismissal.

ALL dismissal procedures will be handled by at least three Phlebotomy Training Specialists Staff Members after consulting the instructor. Students who wish to appeal Phlebotomy Training Specialists final decision can do so in writing.

### **Warnings & Suspension**

Students will be given written warnings when it comes to their conduct in class. If they are disruptive, harass, or discriminate against another student or instructor, they will be written up by their instructor.

Three times being written up will result in suspension from the class. If the student chooses to withdraw from the class AFTER their suspension, the student's tuition will be refunded based on the last day attended and will be based on the refund policy contained herein.

When suspended from a class, a student may not re-enter the class in which they were enrolled, until the start of the next month, they can however attend any other class, such as the evening or weekend class if they were in the day class. If they wish to re-enter at the same time of class as they were originally enrolled, they must wait until the start of the next class, the next month.

### **Re-entry / Readmission**

Upon infraction of one of the above expectations, a Phlebotomy Training Specialists staff member will issue a verbal and written warning to the student. This is to be considered a corrective plan of action. Students get three warnings, and on the fourth incident, they are suspended from class, as stated previously. Students who want to gain re-entry into the class after suspension will have to submit a request to the PTS corporate offices. PTS Corporate offices will take 48 hours to determine eligibility. This may result in a call to the student to discuss the issues at hand. A student who is suspended may only gain re-entry into the class one time. If the impermissible behavior continues, Phlebotomy Training Specialists will dismiss students from the program. Students who have violated policies outlined in the "Automatic Dismissal" section will be subject to automatic dismissal.

## **Student Probation**

Phlebotomy Training Specialists do not put their students on probation.

## **Student Rights**

Phlebotomy Training Specialists affords its students the following rights:

- Access to instructors and management for any assistance
- Fair and impartial treatment
- Providing Privacy to Student Records

## **Facilities and Equipment**

Our school is located at:

**School Address** – 148 Eastern Blvd, 2<sup>nd</sup> Floor, Suite 202, Glastonbury, CT 06033

Students will have hands-on training on modern medical equipment and informative lectures. Large whiteboards, televisions, diagrams, and videos will be provided to enhance classroom activities and didactic learning. The classroom is well-lit, air-conditioned, heated, ventilated, and appropriate for an educational site. Parking is sufficient and conveniently located nearby. Phlebotomy Training Specialists do not provide housing or transportation.

The facility and equipment used fully comply with all federal, state, and local ordinances and regulations, including the requirements for fire safety, building safety, handicaps, access, and health.

## **Exam Information**

Upon successful completion of the program—which includes performing a minimum of thirty (30) live venipunctures, ten (10) live capillary sticks during practical sessions, fulfilling payment obligations, and submitting all required documentation, including a blood draw log—PTS students are eligible to sit for certification examinations from the National Healthcareer Association (NHA).

Students who opt to take the NHA National Exam will receive instructions via email on how to proceed with the exam, including guidance on creating an NHA account. The NHA provides a comprehensive test plan on its website at <https://certportal-store.nhanow.com/category/cpt2/>. Upon successful completion, this examination results in a National Certification, which needs to be renewed every two years. Renewal information can be found at <https://www.nhanow.com/stay-certified>.

## **Learning Resource Information**

Phlebotomy Training Specialists use a training system in which they provide students with all of the resources they need to complete class and attain the knowledge to prepare for and pass the certification exam. This is similar if not identical to how most Phlebotomy programs operate.

Our system coupled with our practiced exams and quizzes have proven to be sufficient in their entirety for students to be successful in their Phlebotomy Training.

To further add to our student's success, we have compiled a learning resource library that students can refer to that uses information directly from the source. This learning resource library is available to all students, current and graduated to keep up to date as the source material is updated.

The learning resource library is available from the student account and can be accessed at any moment from anywhere, and better yet does not require multiple people to handle the learning resource like a hard copy book library, requiring decontamination between readers.

With the resources available in an electronic format, the same resource is available to all students, so no one is left waiting for a return of the resource, nor wait until the next classroom visit to use the resource.

## **Educational Services**

The Phlebotomy Training Program objectives are to prepare students to collect blood samples by venesection. The objective of this class is to prepare students to collect blood samples by phlebotomy to be equipped for an occupation in the medical field.

The program is 80 clock hours long, available either during the day, evening, or on weekends. There is no distance education for this class. All the instruction is classroom instruction, and there are no additional fees to make up classes because we allow all students to return to the class free of charge once they have completed the class one time.

To successfully complete this program, each student will be required to satisfactorily perform the tasks correlated to the function in which they are training. The final written exam is optional but strongly suggested. One watch and critique test will be given. If the entire program is completed satisfactorily, a certificate of completion will be awarded to the student after the program ends.

## **Previous Credits**

Phlebotomy Training Specialists does not grant credit to students for other programs taken in the field of Phlebotomy, Nursing Assistant Training, or any other field. This program is a stand-alone program, and no reduced tuition, nor will reduced hours of participation be given.

## **Transfer of Credits**

The transferability of credit and credentials earned is at the sole discretion of the receiving school. Acceptance of the certificate students earn in Phlebotomy is also at the complete discretion of the institution to which they may transfer. If the certificate is not accepted at the institution to which students may transfer, they may be required to repeat some or all of their coursework at that institution. For this reason, students should make certain that the program with Phlebotomy Training Specialists will meet their educational goals.

## **Student Grievance Procedure**

Phlebotomy Training Specialists do not have any policy nor acts in any manner that discourages or prohibits the filing of inquiries or complaints regarding the school's operation with the Executive Director of Higher Education.

Should a student have a complaint with Phlebotomy Training Specialists, then the following steps shall be taken.

1. The student shall first attempt to resolve the grievance informally with the instructor or applicable staff member. If unsuccessful, the student shall proceed to the written grievance procedure.
2. Please submit the written request to the Student Service Manager, Heidi Samani, [h.samani@phlebotomyusa.com](mailto:h.samani@phlebotomyusa.com), or 801-450-1256; she will assist the student in resolving their concerns. She will investigate the grievance within five business days of receiving the complaint by contacting the student via email or phone to schedule a meeting. In the meeting, Ms. Samani will discuss the complaint, allow the student to be heard, and discuss an amicable resolution to the complaint. Written notification of the resolution will be sent via email to the student within ten days after the student meeting.
3. In her absence, students can contact Student Services at [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com) or 701-404-9434. Within five days of receiving the complaint, a student service representative will contact the student via email or phone to schedule a meeting. In the meeting, they will discuss the complaint, allow the student to be heard, and discuss an amicable resolution. The Student Service representative will consult with the Student Services Manager, and a written notification via email with the resolution will be sent to the student within ten days after the meeting.
4. If a student is unsatisfied with how the school has resolved their complaint, they may file a complaint with Connecticut's Office of Higher Education as a last resort.

### **Contact Information for the Office of Higher Education**

Office of Higher Education  
450 Columbus Boulevard, Suite 707,  
Hartford, CT 06103,  
(860) 947-1816  
or visit the website: [ct.gov/StudentComplaint](https://ct.gov/StudentComplaint)

## **Cancellation Policy**

Students may cancel enrollment at any time by giving written notice to the school at [info@phlebotomyusa.com](mailto:info@phlebotomyusa.com). Refunds of unearned prepaid tuition shall be made in the following manner within thirty (30) days of termination:

- a) If a student cancels their enrollment agreement within three days (excluding Saturday, Sunday, and federal and state holidays) of signing the enrollment agreement, they will be entitled to a refund of all monies paid.

- b) A student choosing to withdraw from the school after the commencement of classes can contact Student Services at 701-404-9434 or by sending an email to [payments@phlebotomyusa.com](mailto:payments@phlebotomyusa.com). Written notification for withdrawal is not required. All refunds will be based on and computed from the last day of verifiable attendance.

### **Tuition Refund Policy and Table**

If a student cancels their enrollment agreement after attending class, a pro-rata refund will be made of all unearned prepaid tuition minus the non-refundable \$150 registration fee according to the table below.

<b><u>Amount Attended</u></b>	<b><u>Refund</u></b>
Attended between 0-16 hours (0-20%) of the program	75% of tuition/fees amount less registration fee
Attended between 17-24 hours (21-30%) of the program	50% of tuition/fees amount less registration fee
Attended between 25-32 hours (31-40%) of the program	25% of tuition/fees amount less registration fee
Attended between 33-39 hours (41-49%) of the program	15% of tuition/fees amount less registration fee
Attended 40 hours or more of the program	No Refund

These calculations are based on full tuition being paid. If a student is not paid in full, the amount refunded will be proportional to tuition paid and classes attended. The \$130 NHA Exam Fee is not included in these calculations, as the exam fee is fully refundable as long as the National Exam is not attempted.

Refunds will only be issued back to the original card used in the transaction. If the card is no longer active, we can send a check which will require a 3% processing fee, and can only be issued to the original cardholder.

### **Withdrawal**

A student will be determined to be withdrawn from the institution if the student has not attended three consecutive modules. the school will process a refund following the refund policy as outlined.

### **Student Eligibility, Accommodations, and Performance Policy**

Intelvio is committed to providing equal educational opportunities to all students, including those with disabilities, in compliance with the Americans with Disabilities Act (ADA). This policy outlines our commitment to inclusivity while maintaining the necessary standards for students participating in the Phlebotomy Program.

Intelvio does not discriminate on the basis of disability and is committed to providing reasonable accommodations to qualified students with disabilities to ensure equal access to educational programs and activities.

Accommodations: Intelvio is committed to providing reasonable accommodations to students with disabilities to facilitate their participation in the Phlebotomy Program. Accommodations will be determined on a case-by-case basis in consultation with the student and the institution's Student Services.

Chaperones: Chaperones or personal assistants are not allowed in the Phlebotomy Program classroom to assist students during the program. All students are expected to participate independently and demonstrate proficiency.

Assessment and Reasonable Modification: Students' abilities to successfully participate in the Phlebotomy Program will be assessed based on their performance in the classroom and if applicable, the clinical settings. This includes their ability to perform blood draws safely and effectively.

Intervio may consider reasonable modifications to accommodate students with disabilities, provided that such modifications do not fundamentally alter the essential

## **2025 PHLEBOTOMY TRAINING SYLLABUS**

### **A. PROGRAM DESCRIPTION:**

The Phlebotomy Training program is designed to train individuals to properly collect and process blood and other clinical specimens for laboratory testing and to interact with healthcare personnel, clients, and the general public. The presentation includes equipment and additives, basic anatomy, and safe and effective venipuncture techniques. Emphasis will be placed on collection techniques, specimen processing, workflow practices, referrals, and utilizing laboratory information systems.

Our average faculty-to-student ratio is 1:16. Our maximum class capacity is 20, so during those times, the ratio is 1:20.

### **B. METHOD OF INSTRUCTION:**

The student is trained through the modules during class, obtaining that knowledge through books and hands-on training each class period.

The book knowledge obtained is then applied in the hands-on training portion of the class. Theory first, and actual application of the theory follows shortly thereafter.

### **C. PROGRAM EXPECTATIONS / COMPETENCIES / OBJECTIVES:**

Upon completion of the Phlebotomy Training program, students will have an opportunity to learn how to:

- a. Demonstrate knowledge, entry-level skills, and tasks associated with blood collecting and other specimen collection processes.
- b. Assist the health care team in the accurate, safe, and reliable collection and transportation of specimens for clinical laboratory analyses.
- c. Apply knowledge to basic and special laboratory procedures.
- d. Demonstrate proper infection control techniques used in specimen collection.

- e. Select appropriate equipment, methods, and reagents for the collection of laboratory specimens.
- f. Prepare patients and equipment for the collection of laboratory specimens.
- g. Apply ethical, legal, and regulatory issues to the collection of laboratory specimens.
- h. Evaluate quality control procedures and possible sources of error or inconsistencies in specimen collection.
- i. Work cooperatively with staff members, patients, and community resource people.
- j. Apply knowledge to create and maintain a safe working environment.
- k. Respect patient confidentiality and maintain professional conduct in a culturally diverse environment.

### TOPICS /UNITS

Unit Titles	Classroom Hours	Lab Hours	Total Hours
<b>Class 1 – Introduction to Phlebotomy</b>	4	0	4
<b>Description:</b> Students will be given an overview of phlebotomy practices and how they've developed over time into the practice's current state including blood collection equipment and procedures. Students will also learn about OSHA rules in the lab and common legal issues.			
<b>Class 2 – Venipuncture Steps</b>	4	0	4
<b>Description:</b> Students will learn the fundamentals of how blood is collected including the steps to performing venipunctures. Students will then learn the sequence of which tubes are carried over to avoid cross contamination known as the "Order of the Draw."			
<b>Class 3 – Lab Skills Development- First Blood Draws</b>	0	4	4
<b>Description:</b> Students will learn and develop phlebotomy skills through activities and demonstrations in the lab such as tying a tourniquet, using a vein viewer device to find and examine veins, and applying counterpressure. The instructor will then perform a blood draw in front of the class and afterward, students will perform venipuncture using straight needles in pairs.			
<b>Class 4 – The Healthcare Setting</b>	4	0	4
<b>Description:</b> Students will learn how to properly attend to patients regardless of the circumstances whether it be children, the elderly, etc. Students will learn quality assurance in the healthcare setting including the different forms of documentation needed for specimen collection and how to prepare them properly. The instructor will then help students identify legal issues found in healthcare.			
<b>Class 5 – Capillary Punctures</b>	4	0	4
<b>Description:</b> Students will learn the general capillary puncture steps and procedures. Students will learn to tell when a capillary puncture is used over a straight stick venipuncture.			

<b>Class 6 – Lab Skills Development – Butterfly Needles</b>	0	4	4
<b>Description:</b> Students will develop their skills in handling butterfly needles. The instructor will go over how to hold butterfly needles, and then how to hold a patient's hand for a successful draw. The instructor will then demonstrate a mock draw with the butterfly set and have each student try performing one.			
<b>Class 7 – Safety</b>	4	0	4
<b>Description:</b> Students will learn proper infection control practices such as good hand hygiene and use of personal protective equipment. Students will also learn how to apply different types of precautions to avoid the spread of significant pathogens.			
<b>Class 8 – Medical Terminology</b>	4	0	4
<b>Description:</b> Students will learn medical root words, medical suffices, and medical abbreviations commonly used in the medical field, including a list a word that students should avoid using whether it is with a patient or with other medical professionals.			
<b>Class 9 – Lab Skills Development – Making Slides &amp; Centrifuge</b>	0	4	4
<b>Description:</b> Students will practice performing dermal sticks and making slides from the sample to spin through the centrifuge. Students will be given time to practice performing venipunctures with Butterfly and Straight needles.			
<b>Class 10 – Body Systems</b>	4	0	4
<b>Description:</b> The majority of this course will have students learning the name and function of each system in the body, especially the vascular system as it relates to Phlebotomy. The class will then further look into the structure of the heart including; the layers, the chambers, and valves.			
<b>Class 11 – Lab Skills Development – Order of the Draw Practice</b>	0	4	4
<b>Description:</b> After the Instructor gives a presentation on Platelet-Rich Plasma (PRP) and Platelet-Rich Fibrin (PRF), the students will draw for PRP/PRF and spin down the sample in the centrifuge. Students will also participate in an activity to familiarize themselves with each part of the order of the draw. The rest of the class time is for open lab practice.			
<b>Class 12 – The Blood</b>	4	0	4
<b>Description:</b> Students will primarily learn about blood including its composition, types, specimens, hemostasis & coagulation. Students will also learn about vascular system disorders and diagnostic tests.			
<b>Class 13 – Lab Skills Development – Hands-On Practice/Activities</b>	0	4	4
<b>Description:</b> Students will continue developing their skills by performing venipunctures, drawing for Platelet-Rich Plasma (PRP) and Platelet-Rich Fibrin (PRF) samples, and spinning down centrifuges. Students will also participate in activities like role-play to further familiarize them with the Order of the Draw and prepare for Practical & National Exam.			
<b>Class 14 – Special Collections</b>	4	0	4



<b>Description:</b> Students will learn about the specific ID and labeling requirements for special collections like blood donors. Students will also learn about blood cultures and what to do in case of a failed venipunctures.			
<b>Class 15 – Friends &amp; Family</b>	0	4	4
<b>Description:</b> Students will continue to hone their lab skills by performing live blood draws on volunteer. They will practice performing blood draws using straight needles and butterfly needles as well. This will prepare students for the practical exam and for their career in Phlebotomy.			
<b>Class 16 – Specimen Collections</b>	4	0	4
<b>Description:</b> Students will look at the different types of collections taken in the medical field like a blood bank. The course also covers the topics of blood cultures, special collections, and point of care testing (POCT).			
<b>Class 17 – Practical Exam</b>	0	4	4
<b>Description:</b> Students will spend the entire session completing the practical skills examination. To pass the exam, students must perform 2 blood draws on the arm and 2 blood draws on the hand, completely unassisted. If a student finishes early, they will spend the rest of the class either practicing blood draws or studying for the National Exam.			
<b>Class 18 – Other Specimens</b>	4	0	4
<b>Description:</b> Through videos and lectures, students will learn about other collectible specimens like Arterial Blood Gas (ABG) and nonblood fluids including stool and urinalysis.			
<b>Class 19 – Career Seminar</b>	4	0	4
<b>Description:</b> Students will prepare for the workforce by learning organizing skills and past accomplishments for resume building, practicing job applications, and developing interview skills for different formats (phone, video, informal, formal). Additionally, students will watch HR videos, learn conflict resolution, and demonstrate emotional intelligence in the workplace.			
<b>Class 20 – Previous Lessons Review &amp; Exam Prep</b>	0	4	4
<b>Description:</b> This class is dedicated in preparing students for both the Practical and the NHA Exams. To prepare specifically for NHA exam, with the class, the instructor will go over the central themes from each Didactic lesson of the training program. Under the Instructor's supervision, students will practice performing procedures from each Lab Skill Development lesson under the instructor's supervision to prepare for the practical evaluation. Students will then spend the rest of class completing/correcting a practice written exam. Students are encouraged to ask the instructor questions relating to theories or procedures.			
<b>COMBINED UNIT HOURS</b>	48	32	80

### **Procedures List:**

Proper Handwashing Technique; Gowning, Masking, and Gloving; Removal of Isolation Gown, Mask, and Gloves; Disposing of Contaminated Items; Gloving Technique; The Basics of Patient Identification; Use of a Tourniquet; Performing a Venipuncture; Skin Puncture Using a Retractable Device; Heel stick Procedure; Dorsal Hand Vein Procedure; Surgicutt Bleeding Time Test; Syringe Blood Culture Collection; Safety Butterfly Assemble Blood Culture collection; Obtaining a Blood Specimen for Glucose Testing; Collecting a 24-Hour Urine Specimen; Proper Specimen Handling.

## **Textbook**

Phlebotomy Textbook

Phlebotomy Essentials, Eighth Edition (2023), by Ruth E. McCall

ISBN: 978-1284263480

## **Holder in Due Course Statement**

*Any holder of this consumer credit contract is subject to all claims and defenses which the debtor could assert against the seller of goods or services obtained pursuant hereto or with the proceeds, hereof Recovery hereunder by the debtor shall not exceed amounts paid by the debtor. (FTC Rule effective 5-14-76).*

## **Accreditation Status**

Intelvio, LLC, d/b/a Phlebotomy Training Specialists, does not hold regional, national, or programmatic accreditation from a U.S. Department of Education-approved accreditor and does not participate in federal or state student aid programs.

PTS students are eligible to sit for certification examinations from the relevant phlebotomy training oversight organizations (National Healthcareer Association (NHA)).