



PHLEBOTOMY
TRAINING SPECIALISTS

North Carolina Course Catalog

756 Tyvola Rd Suite 114
Charlotte, North Carolina 28217

4000 Wake Forest RD Suite 115
Raleigh, North Carolina 27609

www.PhlebotomyUSA.com

Info@phlebotomyusa.com

701-404-9434

Volume No. 4 January 2025

Table of Contents

<i>Introduction</i>	4
<i>School History</i>	5
<i>Mission and Objectives</i>	5
<i>Administration</i>	6
<i>Contact Information</i>	6
<i>Programs/Courses Offered</i>	6
<i>Program/Course Cost</i>	6
<i>Financing Options</i>	7
<i>Student Loans</i>	7
<i>Book/Supplies & Equipment</i>	8
<i>Student Workbook</i>	8
<i>Class Schedule</i>	8
<i>2025 Class Dates and Application Deadlines</i>	8
<i>Enrollment Requirements</i>	10
<i>Enrollment / Admission</i>	11
<i>Postponement of Start Date</i>	11
<i>Employment Advisory Services</i>	11
<i>Attendance Requirements</i>	12
<i>Voluntary Withdraw from Class</i>	12
<i>Withdrawal Policy</i>	12
<i>Rescheduling/Readmittance</i>	13
<i>Scheduled Absence(s)</i>	13
<i>Progress /Grading Scale</i>	13
<i>Graduation and Certificate of Training Requirements</i>	14
<i>Remediation</i>	14
<i>Grading System</i>	14
<i>Records</i>	16
<i>Dress Code</i>	16
<i>Leave of Absence</i>	16
<i>Conduct & Dismissal Policy</i>	16

<i>Warnings & Suspension</i>	<i>18</i>
<i>Re-entry / Readmission</i>	<i>18</i>
<i>Student Probation</i>	<i>19</i>
<i>Voluntary Withdrawal from Class</i>	<i>19</i>
<i>Student Rights</i>	<i>19</i>
<i>Facilities and Equipment</i>	<i>19</i>
<i>Exam and Learning Resource Information</i>	<i>20</i>
<i>Educational Services</i>	<i>20</i>
<i>Change in Course Content</i>	<i>21</i>
<i>Library/Learning Resource System</i>	<i>21</i>
<i>Previous Credits</i>	<i>21</i>
<i>Transfer of Credits</i>	<i>21</i>
<i>Student Grievance Procedure</i>	<i>22</i>
<i>Cancellation and Refund Policy</i>	<i>22</i>
<i>Student Eligibility, Accommodations, and Performance Policy</i>	<i>24</i>
<i>2025 PHLEBOTOMY TRAINING SYLLABUS</i>	<i>24</i>
<i>TOPICS /UNITS/COURSE DESCRIPTION</i>	<i>26</i>
<i>Procedures List:</i>	<i>29</i>
<i>Textbook & Other Learning Resources</i>	<i>29</i>
<i>Holder in Due Course Statement</i>	<i>29</i>
<i>Accreditation Status</i>	<i>29</i>

Introduction

Phlebotomy Training Specialists (hereinafter referred to as PTS) offers Phlebotomy Training and Certification for students and is staffed with qualified, approved, instructors.

Brian Treu is the CEO of PTS. Mr. Treu has been drawing blood for 23 years and has completed over 300,000 blood draws during his career. He serves as a subject matter expert for many certification agencies. His career in medicine 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 7 continents.

Alexis Treu is the COO of PTS. Ms. Treu has broad experience at the Chief Operating Officer level, having served in this capacity since 2017. Her extensive understanding of career school operational functions, as well as that of diverse and complicated state licensure requirements enables her to ensure full program compliance across the country.

Derik Brian, owner, has been a business professional for 22+ years. He is the owner of Miramar Health and Solara Health, separate behavioral healthcare companies, headquartered in Laguna Beach and Newport Beach, CA, respectively. Derik has also been a licensed real estate broker since 1995 at Sotheby's International Realty. Upon graduating college in 1990, he obtained a California primary/secondary teaching credential and taught High School and Elementary School in the Los Unified and Riverside Unified School Districts.

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 a phlebotomist. 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 & 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, Administrator
Alexis Treu – COO
Ericha Dick - Director
Adrienne Current - Book Keeper
Monica Sanborn - VP of Licensing & Compliance

Contact Information

School Addresses:

Charlotte: 756 Tyvola Rd Suite #114 Charlotte, NC 28217

Raleigh: 4000 Wake Forest Rd Suite 115 Raleigh, NC 27609

Home Office- 2570 W 600 N, Suite 400, Lindon, UT 84042

Phone: **701-506-0077** Fax: **385-327-2084**

Email: info@phlebotomyusa.com Website: www.phlebotomyusa.com

Programs/Courses Offered

1 Certificate Program:

96 Hours - Phlebotomy Training

Program/Course Cost

Tuition	Application Fee	Books/Supplies /Equipment	Total Tuition/Fee	National Exam
\$1040	\$100.00 (NON- REFUNDABLE)	\$230.00	1370.00	\$125.00 (Paid to third party)

Total for Phlebotomy Training & Exam = \$1495.00

Payment Policy

Tuition and fees for class can be paid by logging into your student account at students.phlebotomyusa.com. We accept all major credit cards. \$100 minimum is required at the time of registration. After the initial registration fee of \$100 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 the class, unless the student is approved for financing and has signed a retail installment contract (see Financing Options below).

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 Alexis Treu, COO, at info@phlebotomyusa.com. She will review all payment extensions. If an extension is approved, the student will remain in their scheduled course but will be required to pay in full before challenging the practical or national exam.
2. If a student does not contact the Ms. Treu the student will be required to reenroll in new class dates where they will attend the remaining classes in that cohort to complete their program. They will be required to be paid by the halfway point of 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, regardless of circumstance, will be permitted to be certified without full payment. 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 via the student portal. Students may apply for financing at any point throughout the course, 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 15%. Should students withdraw from the course, the published refund policy would apply. Payments are due according to the terms of the retail installment contract 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.

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 does not qualify for Title IV student loans and does not provide student loans.

Book/Supplies & Equipment

Book Rental, Supplies and Equipment: \$150 - Refundable on a pro rata basis in accordance with tuition.

Student Workbook: \$80 - Once textbooks are issued and received by students, these become the property of students and refunds may be made only at the discretion of the private school.

Student Workbook

A Student Workbook for Phlebotomy Essentials, Enhanced Seventh Edition will be provided to each student for the didactic portion of their training. The workbook is essential to the completion of the course as a mandatory supply. The cost of ONE workbook is included in course fees. Students will not receive a replacement in the event the workbook is lost or destroyed. The student will be responsible to purchase a new workbook, at their expense, through the publisher to finish their course.

Class Schedule

Evening- 6pm to 10pm - Monday-Thursday (24 classes)

Day- 9am to 1:00pm – Monday-Thursday (24 classes)

Weekend- 8am to 4:30pm (12 Saturdays)

2025 Class Dates and Application Deadlines

PM Classes: Monday – Friday 6pm – 10pm

AM Classes: Monday – Friday 9am – 1pm

WKD Classes: Saturdays Only 8am – 4:30pm w/ lunch break 12-12:30pm

Month / Class	Dates of each Class	Application Deadline
Jan Day	6, 7, 8, 9, 10, 13, 14, 15, 16, 17, 21, 22, 23, 24, 27, 28, 29, 30, 31 Feb 3, 4, 5, 6, 7	Jan 1 st
Jan Eve	6, 7, 8, 9, 10, 13, 14, 15, 16, 17, 21, 22, 23, 24, 27, 28, 29, 30, 31 Feb 3, 4, 5, 6, 7	Jan 1 st
Jan / Feb / Mar / Apr Weekend	11, 18, 25 Feb 1, 15, 22 Mar 1, 8, 22, 29 Apr 5, 12	Jan 6 th

Feb Day	12, 13, 14, 18, 19, 20, 21, 24, 25, 26, 27, 28, Mar 3, 4, 5, 6, 7, 10, 11, 12, 13, 14, 17, 18	Feb 7th
Feb Eve	12, 13, 14, 18, 19, 20, 21, 24, 25, 26, 27, 28, Mar 3, 4, 5, 6, 7, 10, 11, 12, 13, 14, 17, 18	Feb 7th
Mar Day	24, 25, 26, 27, 28, 31 Apr 1, 2, 3, 4, 7, 8, 9, 10, 11, 14, 15, 16, 17, 18, 21, 22 23, 24	Mar 19th
Mar Eve	24, 25, 26, 27, 28, 31 Apr 1, 2, 3, 4, 7, 8, 9, 10, 11, 14, 15, 16, 17, 18, 21, 22 23, 24	Mar 19th
April Day	28, 29, 30, May 1, 2, 5, 6, 7, 8, 9, 12, 13, 14, 15, 16, 19, 20, 21, 22, 27, 28, 29, 30 Jun 2	Apr 23rd
Apr Eve	28, 29, 30, May 1, 2, 5, 6, 7, 8, 9, 12, 13, 14, 15, 16, 19, 20, 21, 22, 27, 28, 29, 30 Jun 2	Apr 23rd
May / Jun / July / Aug Weekend	3, 10, 17, 31, Jun 7, 21, 28, Jul 12, 19, 26, Aug 2, 9	Apr 28th
June Day	4, 5, 6, 9, 10, 11, 12, 13, 16, 17, 18, 20, 23, 24, 25, 26, 27, 30 Jul 1, 2, 7, 8, 9, 10	May 30th
June Eve	4, 5, 6, 9, 10, 11, 12, 13, 16, 17, 18, 20, 23, 24, 25, 26, 27, 30 Jul 1, 2, 7, 8, 9, 10	May 30th
July Day	14, 15, 16, 17, 18, 21, 22, 23, 24, 25, 28, 29, 30, 31 Aug 1, 4, 5, 6, 7, 8, 11, 12, 13, 14	July 9th
July Eve	14, 15, 16, 17, 18, 21, 22, 23, 24, 25, 28, 29, 30, 31 Aug 1, 4, 5, 6, 7, 8, 11, 12, 13, 14	July 9th
Aug Day	18, 19, 20, 21, 22, 25, 26, 27, 28, Sep 2, 3, 4, 5, 8, 9, 10, 11, 12, 15, 16, 17, 18, 19, 22	Aug 13th
Aug Eve	18, 19, 20, 21, 22, 25, 26, 27, 28, Sep 2, 3, 4, 5, 8, 9, 10, 11, 12, 15, 16, 17, 18, 19, 22	Aug 13th
Sept Day	24, 25, 26, 29, 30, Oct 1, 2, 3, 6, 7, 8, 9, 10, 14, 15, 16, 17, 20, 21, 22, 23, 24, 27, 28	Sept 19th
Sept Eve	24, 25, 26, 29, 30, Oct 1, 2, 3, 6, 7, 8, 9, 10, 14, 15, 16, 17, 20, 21, 22, 23, 24, 27, 28	Sept 19th
Sept / Oct / Nov / Dec Weekend	6, 13, 27, Oct 4, 11, 18, Nov 1, 8, 15, 22, Dec 6, 13	Sep 1st

Holiday Schedule: November & December

PM Classes: Monday – Friday 6pm – 10pm

AM Classes: Monday – Friday 8am – 4:30pm

Month / Class	Dates of each Class	Application Deadline
Nov Day	3, 4, 5, 6, 7, 10, 12, 13, 14, 17, 18, 19	Oct 29 th
Nov Eve	3, 4, 5, 6, 7, 10, 12, 13, 14, 17, 18, 19, 20, 21 Dec 1, 2, 3, 4, 5, 8, 9, 10, 11, 12	Oct 29 th
Dec Day	1, 2, 3, 4, 5, 8, 9, 10, 11, 12, 15, 16	Nov 26 th

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

Enrollment Requirements

The school does not discriminate based on race, sexual orientation, gender identity, religion, ethnic origin, or disability. We require students to be beyond the age of compulsory high school attendance (18 yrs or older). Students must also be high school graduates or have a high school equivalency completion as a minimum entry requirement into the program. The North Carolina Community College Board requires students to submit **an official or unofficial transcript** from their high school or high school equivalency. Transcripts must be sent to documents@phlebotomyusa.com for approval. 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, scholaro.com, or wes.org.

Enrollment / Admission

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. 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 course 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 course is not commenced, or the student fails to attend by the new start date set forth in the agreement, the student will be entitled to a full refund of prepaid tuition and fees except for the \$100 non-refundable application 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.

Employment Advisory Services

Phlebotomy Training Specialists **do not** provide any formal placement into employment opportunities. **Placement in a job is not guaranteed or promised to persons who complete the program.** To that end, we do not leave the students on their own in finding employment.

We do the following for students:

Market Sectors – We provide each student with a list of local sectors of the economy that employ Phlebotomists consistently. We do not provide student referrals to prospective employers and we do not have direct contact with employers regarding current job openings.

This list includes, but is not limited to, Plasma Centers, Blood Banks, Platelet Donation, Dialysis, Physicians' Offices, Medical Clinics, Laboratories, Hospitals, and Paramedical examinations to name a few. This gives the student a head-start on where to look for employment.

Resume Writing – All students will be encouraged to send in their resumes to our on-staff professional resume writers. The writers will then assist the students with

fine-tuning their resume(s) by way of suggestion(s). The writers will also assist the students with putting their resume(s) into a medical format called a Curriculum Vitae.

Interview Preparation – We have a presentation done during class where we discuss interviewing. We also speak to the students regarding the application process for jobs, what to expect during the interview process, and a list of tough questions they will be asked.

Continual Training – All students, once they have completely attended and have paid in full, are allowed to return to the class, free of charge, to keep their skills sharp and to prepare for interviews.

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.

Attendance Requirements

This course is not graded, it is a pass/fail course. Because of this, lack of attendance can affect your ability to pass. This course is comprised of 12 four-hour modules. To complete the class and receive a certificate of completion, students must attend at least 10 out of 12 modules. If students miss more than 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 and will be automatically removed from the class and required to enroll for another schedule.

Please note that modules 1, 2, and 11 are required to complete the course, as these modules contain foundational information (1 & 2) and the practical exam (11).

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.

Voluntary Withdraw from Class

When it comes to students who voluntarily withdraw from class, PTS will abide by the refund schedule outlined in this document.

Withdrawal Policy

After the commencement of class, and within 30 days if the student quits attending class, OR requests to withdraw** will be refunded according to the refund policy listed herein.

If more than 50% of the class has been attended, then no refund will be issued. National Exam Fees are fully refundable for students who withdraw and have not attempted the National Exam. PTS is not responsible for refunds of Textbooks.

***All requests to withdraw must be submitted in writing to info@phlebotomyusa.com*

Rescheduling/Readmittance

If a student is dropped from the course due to non-payment of tuition and fees by the half-way 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.

Progress /Grading Scale

Students must pass a total of 70% of the modules, evaluated at the halfway point of class, to remain on track for graduation. Passing and failing scores for modules is outlined below:

Didactic Modules (16 total days): These days will be graded on a scale of pass/fail. The metric used to determine whether a student passes or fails combines attendance and class participation. The instructor and students will engage in several discussions regarding course topics and objectives that will determine participation. During the Didactic Modules, students will receive constructive feedback on their performance to facilitate continuous improvement. Students cannot fail more than 6 of the didactic modules.

Practical Lab Modules (8 days): These days will be graded on a scale of pass/fail. The metric used to determine whether a student passes or fails combines 3 evaluations (Venipuncture Evaluation, Butterfly Evaluation, Capillary Evaluation), participation, and visual assessments. Students must score higher than 70% on these evaluations to be considered a pass. During the Practical Lab Modules, students will receive constructive feedback on their performance to facilitate continuous improvement. Students cannot fail more than 1 practical lab day. They cannot fail the Graduation Evaluation on the Practical Skills testing day.

Graduation and Certificate of Training Requirements

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

- Passing Scores in Didactic Coursework
- Passing Scores in Lab Coursework
- Passing Scores in Venipuncture Hands-on skills
- Completed Student File / Paperwork
- No outstanding payment obligations

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 order and without correction. Completion of 4 successful draws (2 arm and 2 hand) 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 Training. 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.

Students who complete the 48-hour course and pass the practical exam will be eligible for employment in all states. Some states, such as California, Louisiana, Nevada, and Washington have additional licensing requirements.

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 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. After consulting with the chief administrator, it is determined that if the student cannot complete the remediation required and the student will not benefit from the course, the student will be dismissed and the published refund will be applied.

Grading System

Class 1	Introduction to Phlebotomy	Pass / Fail
Class 2	Venipuncture Steps	Pass / Fail
Class 3	Lab Skills Development – First Blood Draws	Pass / Fail
Class 4	The Healthcare Setting	Pass / Fail
Class 5	Vital Signs Intro	Pass / Fail
Class 6	Lab Skills Development – Butterfly Needles	Pass / Fail
Class 7	Capillary Punctures	Pass / Fail
Class 8	Safety	Pass / Fail
Class 9	Lab Skills Development- Making Slides & Centrifuge	Pass / Fail
Class 10	Medical Terminology	Pass / Fail
Class 11	Vital Signs Continued	Pass / Fail
Class 12	Lab Skills Development – Order of the Draw Practice	Pass / Fail
Class 13	Body Systems	Pass / Fail
Class 14	The Blood	Pass / Fail
Class 15	Lab Skills Development – Open Lab Day	Pass / Fail
Class 16	Special Collections	Pass / Fail
Class 17	Specimen Collection	Pass / Fail
Class 18	Lab Skills Development – Open Lab Time & Activities	Pass / Fail
Class 19	Other Specimens	Pass / Fail
Class 20	Career Seminar	Pass / Fail
Class 21	Lab Skills Development – Hands-On Practice	Pass / Fail
Class 22	Open Study Day	Pass / Fail
Class 23	Practical Exam	Pass / Fail
Class 24	CPR	Pass / Fail

Remedial training will be given until a student passes each module of the course. Throughout your four-week class with Phlebotomy Training Specialists, your instructor will let you know exactly where you stand based on your interim progress reports.

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. 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. 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 period 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 in accordance with 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.

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

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

6. **Automatic Dismissal**

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

narcotics on-premises. Recreational drugs are also not permitted on-premises.

- e. Theft
- f. Being absent for the first 8 hours of the program

Dismissal Procedures:

Upon infraction of one of the above prohibitions, 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. If the prohibited action and/or behavior continues, Phlebotomy Training Specialists will dismiss the infracting student(s) from the program. Any student who has violated the prohibitions outlined in section 5, the "Automatic Dismissal" section, will be subject to automatic dismissal with no exception(s).

All dismissal procedures will be determined by at least three Phlebotomy Training Specialists management team members, including a consultation with the issuing staff member. Any student who wishes to appeal Phlebotomy Training Specialists' final decision, shall do so in writing. Any dismissed student may attain reentry into the program(s) by contacting PTS' founder, Brian Treu, and discussing with him on an individual basis, our expected classroom etiquette.

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 from the class, 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 that 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.

Permanent Termination from the program negates that student from re-admission to the program forever.

Student Probation

Phlebotomy Training Specialists do not put students on probation.

Voluntary Withdrawal from Class

When a student voluntarily withdraws from the program, the school will process a refund in accordance with the refund policy outlined in this document. All requests to withdraw must be submitted in writing to payments@phlebotomyusa.com.

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:

Charlotte: 756 Tyvola Rd Suite 114 Charlotte, North Carolina 28217

Raleigh: 4000 Wake Forest Rd Suite 115 Raleigh, NC 27609

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-lighted, air-conditioned, heated, ventilated, and appropriate for an educational site. Parking is sufficient and conveniently located nearby. Phlebotomy Training Specialists does 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, accessibility, and health.

Exam and Learning Resource Information

Exam

The National Exam fee is a separate fee of \$125 and is optional. The \$125 exam fee covers one attempt for the national examination. Students are required to redeem their exam code with the NHCO within 30 days of course completion. The NHCO further stipulates that exams must be taken within 90 days of code redemption. PTS offers a one-time 50% off retake code upon request, for students who need to retake the exam. If students choose to test, students will take their phlebotomy exam on a computer in a location they choose. The two-hour exam is monitored by a virtual proctor, and audio and video of the examination experience are captured. The student will not be eligible to test with the NHCO if they have not passed the practical skills examination given in class.

If the student chooses NOT to challenge the National exam but passes all other course material, they will receive a certificate of training from our school.

PTS students are eligible to sit for certification examinations from the relevant phlebotomy training oversight organizations (National Healthcareer Association, National Centers for Competency Testing, and National Healthcare Certification Organization).

Learning Resource

Phlebotomy Training Specialists uses 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 digital library is available from the student portal and can be accessed at anytime from anywhere. This minimizes the reliance on printed materials. A digital library allows the school to manage the information efficiently. Changes and updates to the library are made in real-time to according to industry and curriculum standards.

Educational Services

The Phlebotomy Training Course 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 class is 48 hours in length, 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 course, each student will be required to satisfactorily perform the tasks correlated to the function in which they are training. One watch and critique test will be given. If the entire course is completed satisfactorily, a certificate of completion will be awarded to the student after the course ends.

Change in Course Content

If there is a change in the curriculum, then the student will be notified 30 days before the change. No extra expense will be associated with a change in the curriculum so that students will be guaranteed their tuition cost throughout the duration of the course.

Library/Learning Resource System

Phlebotomy Training Specialists uses a training system in which they provide students with all the resources they need to complete class, and attain the knowledge to prepare for and pass the National Phlebotomy Certification Examination. 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.

Previous Credits

Phlebotomy Training Specialists does not grant credit to students for other courses taken in the field of Phlebotomy, Nursing Assistant Training, or any other field. This course is a stand-alone course, 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 act in any manner that discourages or prohibits the filing of inquiries or complaints. Should a student or third-party individual have a complaint with Phlebotomy Training Specialists, they can take the following steps. Students will not be subject to unfair actions as a result of filing a complaint.

1. The student and third-party individuals shall first attempt to address the grievance informally with the instructor or applicable staff member and try to resolve it. If unsuccessful, proceed to the written grievance procedure.
2. Please submit the written request within 60 days of the occurrence to the Student Service Manager, Heidi Samani, 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 Service at info@phlebotomyusa.com or 701-404-9434. They will contact the student within five days or receive the complaint 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 written notification via email with the resolution will be sent to the student within ten days after the meeting.
4. Students who are not satisfied with the way their complaint has been resolved by the school may file a complaint with the North Carolina Community College System; Office of Proprietary Schools-5001 Mail Service Center Raleigh, NC 27699. A complaint form can be found at: <https://www.nccommunitycolleges.edu/proprietary-schools>.

Cancellation and Refund Policy

An applicant denied admission by the school is entitled to a refund of all monies paid.

Cancellation: An applicant who provides written notice of cancellation before the first day of class, or if the school cancels the class, is entitled to a refund of all monies paid. No later than 30 days after receiving the notice of cancellation, the school shall provide the 100% refund.

Refund after the commencement of classes:

Procedure for withdrawal/withdrawal date:

- a) A student choosing to withdraw from the school after the commencement of classes is to provide written notice to the school. The notice is to indicate the expected last date of attendance.
- b) A student will be determined to be withdrawn from the institution if the student has not attended any class for 5 consecutive class days. Refunds will be issued after 30 days based on classes attended per the schedule below or student can reschedule class.
- c) All refunds will be issued within 30 days of the determination of the withdrawal date.

Tuition charges/refunds:

- a) After the commencement of classes, the tuition refund, minus \$100 application fee, shall be determined as follows:

Attended 1-6 AM/PM Classes or 1-3 Weekend Class (Up to 24 hours)	75% full tuition/fees amount less application fee
Attended 7-12 AM/PM Classes or 4-6 Weekend Classes (Up to 48 hours)	50% full tuition/fees amount less application fee
Attended 13 or more AM/PM Classes or 7 Weekend Classes (Over 48 hours)	NO Refund

The calculations above 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 \$125 National Exam Fee is not included in these calculations, as the exam fee is fully refundable as long as the National Exam is not attempted.

Book Rental, Supplies and Equipment: \$150 - Refundable on a pro rata basis in accordance with tuition.

Student Workbook: \$80 - Once textbooks are issued and received by students, these become the property of students and refunds may be made only at the discretion of the private school.

**All requests to withdraw must be submitted in writing to
Payments@phlebotomyusa.com

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 course. 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. Intelvio will consider reasonable modifications to accommodate students with disabilities, provided that such modifications do not fundamentally alter the essential requirements of the Phlebotomy Program or compromise patient safety.

2025 PHLEBOTOMY TRAINING SYLLABUS

A. COURSE DESCRIPTION:

The Phlebotomy course is designed to train individuals to properly collect and process blood and other clinical specimens for laboratory testing and to interact with health care 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. This course will prepare individuals to write the Phlebotomist Certification examination.

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. COURSE EXPECTATIONS / COMPETENCIES/OBJECTIVES:

Upon completion of the Phlebotomy course, 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/COURSE DESCRIPTION

<u>Course Titles</u>	<u>Classroom Hours</u>	<u>Lab Hours</u>	<u>Total Hours</u>
Class 1 - Introduction to Phlebotomy	4	0	4
Course Description: Students will be given an introduction to Phlebotomy where the instructor will go over the intricate history of Phlebotomy practices and see how it has developed into the practice's current state. After learning about the modern-day healthcare setting, students will learn about blood collection equipment used in Phlebotomy. For review, students will complete chapter quizzes and workbook activities.			
Class 2 – Venipuncture Steps	4	0	8
Course Description: This lesson is comprised of instructor lecture, workbook exercises, and chapter quizzes that focus on teaching students the fundamentals of how blood is collected and 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.” Students are asked to pay close attention to learning the venipuncture steps as next class students will start to practice venipunctures with straight needles in pairs and supervised by the instructor.			
Class 3 – Lab Skills Development – First Blood Draws	0	4	12
Course Description: In this lesson, 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.			
Class 4 – The Healthcare Setting	4	0	16
Course Description: This course is dedicated to teaching students 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. For review, students will complete chapter quizzes and workbook activities.			
Class 5 – Vital Signs Intro	0	4	20
Course Description: In an introduction to taking a patient's vital signs, the instructor will demonstrate how to take each vital sign and then the students will practice on one another. The vital signs covered in this course are Blood Pressure, Pulse Rate, Pulse Oximetry, and Breath/Respiration. The rest will be covered in “Class 11 – Vital Signs Continued.”			
Class 6 – Lab Skills Development – Butterfly Needles	0	4	24

Course Description: 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. The rest of the course is open time for the student to practice performing venipunctures with butterfly needles and straight sticks.			
Class 7 – Capillary Punctures	4	0	28
Course Description: In this course, 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. For review, students will complete chapter quizzes and workbook activities.			
Class 8 – Safety	4	0	32
Course Description: 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. Students will also learn proper fire, chemical, electrical safety, and personal wellness. For review, students will complete chapter quizzes and workbook activities.			
Class 9 – Lab Skills Development – Making Slides & Centrifuge	0	4	36
Course Description: After reviewing how to perform capillary punctures and make slides, students will practice dermal sticks and making slides. Students will have time to practice performing venipunctures with Butterfly and Straight needles. Students are then given time to perform bloods draws and spin the samples in the centrifuge.			
Class 10 – Medical Terminology	4	0	40
Course Description: 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. For review, students will complete chapter quizzes and workbook activities.			
Class 11 – Vital Signs Continued	0	4	44
Course Description: In conclusion to “Class 5 – Vital Signs Intro,” students will finish learning how to taking a patient's vital signs, the instructor will demonstrate how to take each vital sign and then the students will practice on one another. The vital signs covered in this course includes, Blood Glucose, Pupils, Height & Weight. The instructor will then give presentations on getting patient information through the Intake Interview and proper bedside manner.			
Class 12 – Lab Skills Development – Order of the Draw Practice	0	4	48
Course Description: After the Instructor gives a presentation on Platelet-Rich Plasma (PRP) and Plasma-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.			
Class 13 – Body Systems	4	0	52
Course Description: 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. For review, students will complete chapter quizzes and workbook activities.			
Class 14 – The Blood	4	0	56

Course Description: Continuing from the previous course, students will learn about vascular system disorders & diagnostic tests. The students will then learn the composition of blood including how the body stops itself from bleeding. Students will then start to learn about preexamination/preanalytical variables that influence a laboratory's test results. For review, students will complete chapter quizzes and workbook activities.			
Class 15 – Lab Skills Development – Open Lab Day	0	4	60
Course Description: The entirety of this course is open practice time for students to practice performing any type of venipunctures. There is a set amount of time dedicated for students to practice taking vitals.			
Class 16 – Special Collections	4	0	64
Course Description: 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. For review, students will complete chapter quizzes and workbook activities.			
Class 17 – Specimen Collections	4	0	68
Course Description: This course offers students a 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). This course will require students to complete assignments out of the workbook as well as quizzes given by the instructor.			
Class 18 – Open Lab Time & Activities	0	4	72
Course Description: The entirety of this course is open practice time for students to practice performing any type of venipunctures. There is a set amount of time dedicated for students to watch informational videos on improper practices and participate in roleplay activities.			
Class 19 – Other Specimens	4	0	76
Course Description: Through videos and lectures, students will learn about other collectible specimens like Arterial Blood Gas (ABG) and nonblood fluids including stool and urinalysis. For review, students will complete chapter quizzes and workbook activities.			
Class 20 – GCP & Shipping	4	0	80
Course Description: This class is dedicated to teaching students the proper handling, packaging, and transportation of specimens. This includes learning the exact specifications for shipping, packaging, marking and labeling. There will be a focus on students to learn good common practices in shipping.			
Class 21 – Friends & Family	0	4	84
Course Description: This class is to prepare students for the upcoming exams and eventually the workforce by letting them perform actual live draws. Students will invite their friends and families to visit and perform live draws on them. This will allow each student to demonstrate mastery of straight needle venipuncture and then perform butterfly needle venipuncture in preparation for the practical exam.			
Class 22 – Career Seminar	4	0	88
Course Description: This course prepares students to enter the workforce. They will practice filling out a mock job application, and they will learn how to create a functional resume. This course also prepares students for phone, video, informal, and formal interviews which includes learning how to list their skills and accomplishments. There will also be a HR video presentation where students will learn conflict resolution and emotional intelligence in the workspace.			
Class 23 – Practical Exam	0	4	92

Course Description: This class is a hands-on day which involves students trying to pass their practical exam. Students must perform 2 arm draws and 2 hand draws completely unassisted with the instructor watching to verify. In this class students are allowed to invite friends and family to volunteer for sticking. (18 and older with a signed liability form).

Class 24 – CPR	4	0	96
-----------------------	---	---	----

Course Description: Students will learn essential life-saving skills, including how to recognize and respond to cardiac and breathing emergencies in adults, children, and infants. The course covers hands-on practice of chest compressions, rescue breaths, and the use of an automated external defibrillator (AED). Students will be equipped with the knowledge and confidence to provide immediate care until professional medical help arrives.

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; Heelstick 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 & Other Learning Resources

Phlebotomy Essentials, 7th Edition by Ruth McCall 2019

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

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.

PTS students are eligible to sit for certification examinations from the relevant phlebotomy training oversight organizations (National Healthcareer Association, National Centers for Competency Testing, and National Healthcare Certification Organization) and PTS training complies with the standards of all relevant phlebotomy trade associations (Clinical Laboratory Standards Institute, National

Association of Phlebotomy Technicians, National Phlebotomy Certification Association.