

COMPETENCY-BASED OCCUPATIONAL FRAMEWORK FOR REGISTERED APPRENTICESHIP

Phlebotomist

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ABOUT THE URBAN INSTITUTE

The nonprofit Urban Institute is dedicated to elevating the debate on social and economic policy. For nearly five decades, Urban scholars have conducted research and offered evidence-based solutions that improve lives and strengthen communities across a rapidly urbanizing world. Their objective research helps expand opportunities for all, reduce hardship among the most vulnerable, and strengthen the effectiveness of the public sector.

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Competency-Based Occupational Frameworks

The Urban Institute, under contract by the U.S. Department of Labor, has worked with employers, subject matter experts, labor unions, trade associations, credentialing organizations and academics to develop Competency-Based Occupational Frameworks (CBOF) for Registered Apprenticeship programs. These frameworks defined the **purpose** of an occupation, the **job functions** that are carried out to fulfill that purpose, the **competencies** that enable the apprentice to execute those job functions well, and the **performance criteria** that define the specific knowledge, skills and personal attributes associated with high performance in the workplace. This organizational hierarchy – Job Purpose – Job Functions – Competencies – Performance Criteria – is designed to illustrate that performing work well requires more than just acquiring discrete knowledge elements or developing a series of manual skills. To perform a job well, the employee must be able to assimilate knowledge and skills learned in various settings, recall and apply that information to the present situation, and carry out work activities using sound professional judgement, demonstrating an appropriate attitude or disposition, and achieving a level of speed and accuracy necessary to meet the employer’s business need.

The table below compares the terminology of Functional Analysis with that of traditional Occupational Task Analysis to illustrate the important similarities and differences. While both identify the key technical elements of an occupation, Functional Analysis includes the identification of behaviors, attributes and characteristics of workers necessary to meet an employer’s expectations.

Framework Terminology	Traditional Task Analysis Terminology
Job Function – the work activities that are carried out to fulfill the job purpose	Job Duties – roles and responsibilities associated with an occupation
Competency – the actions an individual takes and the attitudes he/she displays to complete those activities	Task – a unit of work or set of activities needed to produce some result
Performance Criteria – the specific knowledge, skills, dispositions, attributes, speed and accuracy associated with meeting the employer’s expectations	Sub Task – the independent actions taken to perform a unit of work or a work activity

Although designed for use in competency-based apprenticeship, these Competency-Based Occupational Frameworks also support time-based apprenticeship by defining more clearly and precisely what an apprentice is expected to learn and do during the allocated time-period.

CBOFs are comprehensive to encompass the full range of jobs that may be performed by individuals in the same occupation. As employers or sponsors develop their individual apprenticeship programs, they can extract from or add to the framework to meet their unique organizational needs.

Components of the Competency-Based Occupational Framework

Occupational Overview: This section of the framework provides a description of the occupation including its purpose, the setting in which the job is performed and unique features of the occupation.

Work Process Schedule: This section includes the job functions and competencies that would likely be included in an apprenticeship sponsor's application for registration. These frameworks provide a point of reference that has already been vetted by industry leaders so sponsors can develop new programs knowing that they will meet or exceed the consensus expectations of peers. Sponsors maintain the ability to customize their programs to meet their unique needs, but omission of a significant number of job functions or competencies should raise questions about whether or not the program has correctly identified the occupation of interest.

Cross-cutting Competencies: These competencies are common among all workers, and focus on the underlying knowledge, attitudes, personal attributes and interpersonal skills that are important regardless of the occupation. That said, while these competencies are important to all occupations, the relative importance of some versus others may change from one occupation to the next. These relative differences are illustrated in this part of the CBOF and can be used to design pre-apprenticeship programs or design effective screening tools when recruiting apprentices to the program.

Detailed Job Function Analysis: This portion of the framework includes considerable detail and is designed to support curriculum designers and trainers in developing and administering the program. There is considerable detail in this section, which may be confusing to those seeking a more succinct, higher-level view of the program. For this reason, we recommend that the Work Process Schedule be the focus of program planning activities, leaving the detailed job function analysis sections to instructional designers as they engage in their development work.

- a. **Related Technical Instruction:** Under each job function appears a list of foundational knowledge, skills, tools and technologies that would likely be taught in the classroom to enable the apprentice's on-the-job training safety and success.

- b. Performance Criteria: Under each competency, we provide recommended performance criteria that could be used to differentiate between minimally, moderately and highly competent apprentices. These performance criteria are generally skills-based rather than knowledge-based, but may also include dispositional and behavioral competencies.

Using the Competency-Based Occupational Framework to Develop a Registered Apprenticeship Program

When developing a registered apprenticeship program, the Work Process Schedule included in this CBOF provides an overview of the job functions and competencies an expert peer group deemed to be important to this occupation. The Work Process Schedule in this document can be used directly, or modified and used to describe your program content and design as part of your registration application.

When designing the curriculum to support the apprenticeship program – including on the job training and related technical instruction – the more detailed information in Section 5 could be helpful. These more detailed job function documents include recommendations for the key knowledge and skill elements that might be included in the classroom instruction designed to support a given job function, and the performance criteria provided under each competency could be helpful to trainers and mentors in evaluating apprentice performance and insuring inter-rater reliability when multiple mentors are involved.

Phlebotomist Occupational Overview

Occupational Purpose and Context

Phlebotomists are Medical Lab Technicians who draw and process blood and other biological samples for tests, transfusions, donations, or research. They may explain the procedure to patients and provide assistance if patients have adverse reactions after their blood is drawn.

Phlebotomists work in hospitals, medical and diagnostic laboratories, blood donor centers, doctors' offices, and mobile phlebotomy services.

Because all blood samples look the same, phlebotomists must carefully identify and label each blood sample they have drawn and enter it into a database. In order to avoid causing infection and other complications, phlebotomists must keep their work areas and instruments clean and sanitary.

Phlebotomists are specialists at their craft and often represent the "face of the laboratory".

Potential Job Titles

Phlebotomist, Phlebotomy Technician, Registered Phlebotomy Technician, Certified Phlebotomist, Patient Service Technician, Medical Lab Assistant, Phlebotomy Director/Program Coordinator/Supervisor

Apprenticeship Prerequisites

Phlebotomists must complete post-secondary training with a minimum of 200 total hours of instruction. This instruction must include training in medical terminology (minimum of 8 hours), anatomy and physiology (minimum of 40 hours), essential communication for healthcare professionals (minimum of 24 hours), and a phlebotomy clinical of at least 100 hours. Precertification training includes a number of "sticks" that varies by state and certification type. For example, for most states the National Center for Competency Testing specifies 25 venipuncture and 5 capillary sticks are required for Registered Phlebotomy Technician (RPT) certification. Participation in a training program requires a complete background check, documentation of current required-immunizations and current Healthcare Provider

Cardiopulmonary Resuscitation (CPR) certification. Phlebotomy program students must undergo drug screening prior to employment.

Occupational Pathways

Phlebotomists typically enter the occupation with on-the-job clinical training. Some enter with a postsecondary non-degree award from a phlebotomy program. Programs are available from community colleges, vocational schools, proprietary schools, or technical schools. These programs usually take less than 1 year to complete and lead to a certificate. Certification programs involve clinical experience and classroom instruction in such areas as anatomy, physiology, and medical terminology. Some states may separately certify Phlebotomists to do skin punctures only, or skin and venipuncture, or skin and venipuncture and arterial puncture blood collection.

Most phlebotomists enter the profession with a high school diploma and are trained to be a phlebotomist on the job. No matter their education level, phlebotomists also receive instructions on how to identify, label, and track blood and biological samples.

Healthcare occupations that phlebotomists often progress into include the following: phlebotomy specialist, medical lab assistant, traveling phlebotomist, donor phlebotomy specialist, phlebotomy supervisor, patient care technician and other clinical medicine, health care, and laboratory positions.

Attitudes and Behaviors

Persons who are successful in becoming phlebotomists possess dexterity and hand-eye coordination, using their equipment efficiently and properly and drawing blood successfully on their first attempt whenever possible. Successful phlebotomists are also detail-oriented, so that with no errors they can draw blood samples in a manner that does not alter test results in the process, does not harm patients, and does not risk exposing themselves to bloodborne pathogens. Phlebotomists must have the stamina to work on their feet for long periods and maintain their performance throughout the day. Lastly, successful phlebotomists are compassionate and caring with clients or patients who are afraid of having their blood drawn.

Other terms listed in DACUMs (Developing a Curriculum) to describe attitudes and behaviors of phlebotomists include: *Mentally alert, maintaining a positive attitude, desiring to expand skills and able to take constructive criticism, honest, patient, ethical, independent, reliable, and confident.*

Certifications, Licensure and Other Credential Requirements

CREENTIAL	Offered By	Before, During or After Apprenticeship
Phlebotomy Technician (NCPT)	National Center for Competency Testing	After (in most but not all states)
Phlebotomy Technician (PBT)	American Society for Clinical Pathology	After (in most but not all states)
Registered Phlebotomy Technician (RPT)	American Medical Technologists	After (in most but not all states)
Certified Phlebotomy Technologist	National Phlebotomy Association	After (in most but not all states)
Certified Phlebotomist Technician	American Society of Phlebotomy Technicians, Inc.	After (in most but not all states)
Certified Phlebotomy Technician (CPT)	National Healthcareer Association	After (in most but not all states)
Certified Phlebotomy Technician (CPT)	American Certification Agency	After (in most but not all states)
Certification for Phlebotomists	American Medical Certification Association	After (in most but not all states)

Job Functions

JOB FUNCTIONS		Core or Optional
1.	Perform Clerical Functions	Core
2.	Perform Phlebotomy	Core
3.	Process Specimens	Core
4.	Transport and Handle Nonblood Specimens	Optional
5.	Perform and Assist with Clinical Laboratory Improvement Amendments (CLIA)-Waived Testing	Core

6.	Maintain Safe Environment	Core
7.	Continue Professional Development Education	Core

Stackable Programs

This occupational framework is designed to link to the following additional framework(s) as part of a career laddering pathway.

Stackable Programs		Base or Higher Level	Stacks on top of
1.		Base Program	
2.			
3.			
4.			

Options and Specializations

The following options and specializations have been identified for this occupation. The Work Process Schedule and individual job function outlines indicate which job functions and competencies were deemed by industry advisors to be optional. Work Process Schedules for Specializations are included at the end of this document.

Options and Specializations	Option	Specialization
Not Applicable		

Levels

Industry advisors have indicated that individuals in this occupation may function at different levels, based on the nature of their work, the amount of time spent in an apprenticeship, the level of skills or knowledge mastery, the degree of independence in performing the job or supervisory/management responsibilities.

Level	Distinguishing Features	Added Competencies	Added Time Requirements
Not Applicable			

Work Process Schedule

WORK PROCESS SCHEDULE ¹		O*NET-SOC Code: 31-9097.00	
Phlebotomist		RAPIDS Code: 2036CB	
Job Title:			
Level:		Specialization:	
Stackable ___yes ___no			
Base Occupation Name:			
Company Contact:			
Address:		Phone:	Email:
Apprenticeship Type: ___ Competency-Based ___ Time-Based ___ Hybrid		Prerequisites: Less than one-year accreditation program Background check Documentation of immunizations Current health care provider CPR certification Current TB and Hepatitis test	
JOB FUNCTION 1: Perform Clerical Functions			
Competencies	Core or Optional	RTI	OJT
A. Identify patient and obtain patient information	Core		
B. Transmit information	Core		
C. Schedule patient appointments	Optional		
D. Enter data and maintain client confidentiality	Core		

¹ See full framework for certifications and occupational pathways, cross-cutting competencies, and detailed job functions at <https://www.dol.gov/cgi-bin/leave-dol.asp?exiturl=https://www.urban.org/policy-centers/center-labor-human-services-and-population/projects/competency-based-occupational-frameworks-registered-apprenticeships&exitTitle=www.urban.org>.

E. Maintain supplies	Core		
JOB FUNCTION 2: Perform Phlebotomy			
Competencies	Core or Optional	RTI	OJT
A. Read physician's requisition and prepare for procedures	Core		
B. Tie tourniquet and obtain samples in proper vials	Core		
C. Collect arterial blood gas specimens	Core		
D. Complete the blood collection procedure	Core		
E. Prepare samples for processing	Core		
F. Provide age-appropriate post-care instructions	Core		
G. Dispose hazardous materials and restore work area	Core		
JOB FUNCTION 3: Process Specimens			
Competencies	Core or Optional	RTI	OJT
A. Receive specimens	Core		
B. Prepare and label specimens for processing	Core		
C. Transport and store specimens	Optional		
D. Clean and disinfect area	Core		
JOB FUNCTION 4: Transport and Handle Nonblood Specimens			
Competencies	Core or Optional	RTI	OJT
A. Collect forensic specimens	Optional		
B. Collect chain-of-custody specimens	Optional		
JOB FUNCTION 5: Perform and Assist with Clinical Laboratory Improvement Amendments (CLIA)-Waived Testing			
Competencies	Core or Optional	RTI	OJT
A. Perform waived testing	Core		
B. Set-up micro-cultures	Core		
C. Assist with performance of lab tests	Core		

JOB FUNCTION 6: Maintain Safe Environment			
Competencies	Core or Optional	RTI	OJT
A. Maintain universal precautions	Core		
B. Follow ergonomic procedures	Core		
C. Maintain secure environment	Core		
D. Handle and dispose of chemical and biological hazards	Core		
E. Perform routine equipment maintenance	Core		
F. Participate in disaster preparedness	Core		
JOB FUNCTION 7: Continue Professional Development Education			
Competencies	Core or Optional	RTI	OJT
A. Maintain certification and skills	Core		
B. Review policies and procedures	Core		
C. Provide clinical training to others	Optional		

Sample Related Instruction Outline

COURSE NAME: Introduction to Phlebotomy	Course Number
	Hours: 30 total
LEARNING OBJECTIVES	
<p>Introduction to Phlebotomy includes instruction in the healthcare setting and the role of the phlebotomist, safety and infection control, basic laboratory skills (pipetting, handling laboratory glassware, weight measurement, and metric conversion), laboratory specimen requirements, specimen handling and processing, medical terminology, how to identify and work with patients with special needs or mental health problems, professionalism, ethics, patient confidentiality, and legal issues.</p>	
COURSE NAME: Phlebotomy Techniques	Course Number
	Hours: 75 total
LEARNING OBJECTIVES	
<p>In Phlebotomy Techniques, students develop skills in venipuncture, capillary puncture, and other skills required to perform successful blood techniques. This course includes a 45-hour clinical experience.</p>	

The above is a sample of course requirements for initial certification as a phlebotomist. Alternately, this section could be populated with example course content for continuing education courses required for annual recertification. Examples include skill reviews in dermal puncture and capillary blood collection, HIV safety, laboratory ergonomics, medical error prevention, minimizing pre-analytical variability, blood borne pathogens, challenges in capillary blood collection and testing, review of routine venipuncture, tuberculosis awareness.

Cross-Cutting Competencies

COMPETENCY**		0	1	2	3	4	5	6	7	8
Personal Effectiveness	Interpersonal Skills									
	Integrity									
	Professionalism									
	Initiative									
	Dependability and Reliability									
	Adaptability and Flexibility									
	Lifelong Learning									
Academic	Reading									
	Writing									
	Mathematics									
	Science & Technology									
	Communication									
	Critical and Analytical Thinking									
	Basic Computer Skills									
Workplace	Teamwork									
	Customer Focus									
	Planning and Organization									
	Creative Thinking									
	Problem Solving & Decision Making									
	Working with Tools & Technology									
	Checking, Examining & Recording									
	Business Fundamentals									
	Sustainable									
	Health & Safety									

**Cross-cutting competencies are defined in the Competency Model Clearinghouse:

<https://www.careeronestop.org/CompetencyModel/competency-models/building-blocks-model.aspx>

Cross-cutting competencies identify transferable skills – sometimes called “soft skills” or “employability skills” – that are important for workplace success, regardless of a person’s occupation. Still, the relative importance of specific cross-cutting competencies differs from occupation to occupation. The Cross-Cutting Competencies table, above, provides information about which of these competencies is most important to be successful in a particular occupation. This information can be useful to employers or intermediaries in screening and selecting candidates for apprenticeship programs, or to pre-apprenticeship providers that seek to prepare individuals for successful entry into an apprenticeship program.

The names of the cross-cutting competencies come from the U.S. Department of Labor’s Competency Model Clearinghouse and definitions for each can be viewed at <https://www.careeronestop.org/CompetencyModel/competency-models/building-blocks-model.aspx>.

The scoring system utilized to evaluate the level of competency required in each cross cutting skill aligns with the recommendations of the Lumina Foundation’s Connecting Credentials Framework. The framework can be found at: <http://connectingcredentials.org/wp-content/uploads/2015/05/ConnectingCredentials-4-29-30.pdf>.

Cross-cutting competency scores were developed from text analysis of the O*NET web link for [Phlebotomist](#).

Detailed Job Functions

JOB FUNCTION 1: Perform Clerical Functions

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Administrative and clerical procedures • Customer and personal service • Deductive reasoning • English language reading comprehension and writing • Healthcare Common Procedure Coding System (HCPCS) • HIPAA compliance and other legal aspects of healthcare • How Insurance Works/Insurance • Medical terminology • Medication Spelling 	<ul style="list-style-type: none"> • Ability to learn software programs • Assessing appropriateness of multiple tests and avoiding duplicate billing • Entering patient, specimen, insurance, and billing information into computer • Maintaining medical records • Password management • Plotting and interpreting charts • Printing labels • Recording and communicating messages • Researching undefined tests • Scheduling • Telephone etiquette • Time management • Understanding physician schedules 	<ul style="list-style-type: none"> • Credit card machines • Electronic Medical Record/Electronic Health Record and Billing software, such as VelociDoc, Practice Fusion, Medisoft, NextGen, Centricity, EPIC, Intergy, AmazingCharts, eClinicalWorks, and Cerner • Fax machines • Forms • Material Safety Data Sheets (MSDSs) • Notebook computers • Office Applications Software for calendar and scheduling, electronic mail, word processing, and spreadsheets • Personal computers • Photocopiers • Physician's Desk Reference • Policies and procedure manuals • Printers • Postal machine and meter

Competency A: Identify patient and obtain patient information	Core or Optional
PERFORMANCE CRITERIA	
1. Identify patient	Core
2. Obtain patient demographics	Optional
3. Obtain physician orders	Core
4. Obtain billing and insurance information	Optional

Competency B: Transmit information	Core or Optional
PERFORMANCE CRITERIA	
1. Enter physician orders	Core
2. Provide specimen collection instructions and materials	Core
Competency C: Schedule patient appointments	Core or Optional
PERFORMANCE CRITERIA	
1. Use scheduling software	Optional
2. Arrange and confirm appointment with patient or co-worker	Optional
Competency D: Enter data and maintain client confidentiality	Core or Optional
PERFORMANCE CRITERIA	
1. Enter data into a laboratory information system	Optional
2. Maintain quality assurance data logs	Core
3. Maintain client confidentiality	Core
Competency E: Maintain supplies	Core or Optional
PERFORMANCE CRITERIA	
1. Maintain supply stocks	Core
2. Submit reorder requests for supplies as needed	Optional

JOB FUNCTION 2: Perform Phlebotomy

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Anatomy and physiology • Cardiopulmonary Resuscitation (CPR) • Current Procedural Terminology (CPT) • Proper disposal techniques for blood or other biohazard fluids or tissue • Proper disposal techniques for contaminated sharps • Reading and interpretation of vital signs • Sterile technique 	<ul style="list-style-type: none"> • Administering subcutaneous or intramuscular injects, in accordance with licensing restrictions • Assembling and maintaining medical instruments • Assessing patient during and after procedures • Calibrating and maintaining blood plasma collection machines/other machines • Collecting fluid and tissue samples, using appropriate collection procedures (specific procedures?) • Collecting vital signs • Conducting glucose screening/oral glucose tolerance tests • Conducting hemoglobin tests to ensure donor iron levels are normal • Determining donor suitability, according to interview results, vital signs, and medical history • Following complex instructions • Identifying and working with clients with mental health problems • Identifying and work with clients with special needs • Interpersonal skills: Translating medical terms to lay terms, Gender/Cultural Diversity, talking to patients and donors nervous about having blood drawn, explaining fluid or tissue collection procedures to patients • Keeping work areas clean and sanitary • Matching laboratory requisition forms to specimen tubes • Math skills: Dosage calculation, unit conversion • Monitoring blood and plasma donors during and after procedures • Organizing and cleaning blood drawing trays, ensuring all 	<ul style="list-style-type: none"> • Alcohol/Alcohol Wipes • Antiseptic Hand Sanitizing Solution • Band aids • Betadine • Blood collection tubes: vacuum tubes, aliquot tubes, blood culture bottles, sterile screw-cap glass/plastic tubes • Blood glucose monitor/test strips • Blood plasma collection machines • Blood pressure cuffs • Breathalyzer • Chemical Sterilant • Digital timer • Drawing chair • Gauze pads • Gloves, sterile • Glucose monitors/meters • Lancets • Micro-capillary hematocrit tubes (aka micro-hematocrit capillary tubes) • Needle holders • Needles, including butterfly needles • Occult blood kits and slides • Phlebotomy carts • Pin worm paddles • Pulse Oximeter • Radiographic vein locators • Sharps containers • Spill kits • Sputum cups • Sterile specimen containers • Stool kits • Syringe • Thermometer • Tourniquets • Vacutainer Tube

	<p>instruments are sterile and all needles, syringes, or related items are of first-time use</p> <ul style="list-style-type: none"> • Paper sheeting exam tables • Performing saline flushes or dispensing anticoagulant drugs such as Heparin through intravenous (IV) lines, in accordance with licensing restrictions and under the direction of a medical doctor • Phlebotomy skills for arteries using arterial collection techniques • Phlebotomy skills for capillaries by dermal puncture: heel or finger stick methods • Phlebotomy skills for veins: vacuum tube, syringe, or butterfly venipuncture • Serving refreshments to donors to ensure absorption of sugar • Verifying patient or donor identity 	
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Competency A: Read physician's requisition and prepare for procedures	Core or Optional
PERFORMANCE CRITERIA	
1. Read physician's requisition	Core
2. Put on personal protective equipment (goggles, gloves, and lab coat)	Core
3. Assess medical requirements	Core
4. Verify physician orders	Core
5. Identify patient	Core
6. Assess patient needs	Core
Competency B: Tie tourniquet and obtain samples in proper vials	Core or Optional
PERFORMANCE CRITERIA	
1. Select anatomical site	Core
2. Assemble phlebotomy supplies	Core
3. Prepare anatomical site	Core
4. Tie tourniquet on patient's arm	Core

5. Obtain blood samples in proper vials	Core
6. Assess patient condition	Core
Competency C: Collect arterial blood gas specimens	Core or Optional
PERFORMANCE CRITERIA	
1. Demonstrate proper and safe use of arterial blood gas equipment	Optional
2. Collect arterial blood gas specimens	Optional
3. Assess patient condition	Core
Competency D: Complete the blood collection procedure	Core or Optional
PERFORMANCE CRITERIA	
1. Remove tourniquet from patient's arm	Core
2. Remove needle	Core
3. Apply pressure with cotton ball or gauze	Core
4. Check site and bandage stick area	Core
Competency E: Prepare samples for processing	Core or Optional
PERFORMANCE CRITERIA	
1. Label tubes	Core
2. Package and transport samples	Core
Competency F: Provide age-appropriate post-care instructions	Core or Optional
PERFORMANCE CRITERIA	
1. Know differences in age-appropriate post-care activities	Core
2. Communicate instructions effectively to patients of different ages	Core
Competency G: Dispose hazardous materials and restore work area	Core or Optional
PERFORMANCE CRITERIA	
1. Properly dispose of biohazardous materials	Core
2. Clean work area	Core
3. Assure equipment is functioning and accessible	Core
4. Replace used equipment from stock as needed	Core

JOB FUNCTION 3: Process Specimens

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Basic biology and biochemistry • Reading, writing, and arithmetic skills 	<ul style="list-style-type: none"> • Conducting blood alcohol tests • Conducting blood culture tests • Conducting peak and trough drug level tests • Conducting gram stain tests/tests involving blood smears • Documenting route of specimens from collection to laboratory analysis and diagnosis • Entering patient information and specimen information into computers/databases • Good near vision and finger dexterity • Labeling blood samples after drawing • Matching laboratory requisition forms to specimen tubes • Operating an incubator • Operating a centrifuge • Printing legibly • Processing blood or other fluid samples for further analysis by other medical professionals • Providing sample analysis results to physicians to assist diagnosis • Recording temperature on refrigerators • Transporting specimens or fluid samples from collection sites to laboratories 	<ul style="list-style-type: none"> • Apron • Arterial blood gas monitors and kits • Asbestos gloves • Autoclave/autoclave bags • Balance Scales • Bar code printer • Bar code reader • Biotest • Centrifuge • Culture plates • Diluent Solution • Face Mask • Gram stain supplies • Hood • Lab slides and cover slips • Medical reference books • Phenol solution • Potassium hydroxide • Transfer/volumetric/ESR pipettes • Unopette microcollection systems

Competency A: Receive specimens	Core or Optional
PERFORMANCE CRITERIA	
1. Receive specimens	Core
2. Record and confirm receipt of specimens	Core

Competency B: Prepare and label specimens for processing	Core or Optional
PERFORMANCE CRITERIA	
1. Prepare specimens (i.e. vials) correctly	Core
2. Label specimens correctly	Core
3. Confirm correct preparation by inspection	Core
Competency C: Transport and store specimens	Core or Optional
PERFORMANCE CRITERIA	
1. Transport specimens	Optional
2. Store specimens appropriately, in the appropriate area (e.g. Lab Sections or Reference Lab)	Optional
3. Arrange for pickup of specimens	Optional
Competency D: Clean and disinfect area	Core or Optional
PERFORMANCE CRITERIA	
1. Clean area	Core
2. Disinfect area	Core

JOB FUNCTION 4: Transport and Handle Nonblood Specimens

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<i>This section may include certain knowledge, skills, tools, and technologies specified under job functions 2 and 3.</i>	<i>This section may include certain knowledge, skills, tools, and technologies specified under job functions 2 and 3.</i>	<i>This section may include certain knowledge, skills, tools, and technologies specified under job functions 2 and 3.</i>

Competency A: Collect forensic specimens	Core or Optional
PERFORMANCE CRITERIA	
1. Collect forensic specimens	Optional
2. Know and provide appropriate documentation and security for forensic lab specimens	Optional
Competency B: Collect chain-of-custody specimens	Core or Optional
PERFORMANCE CRITERIA	
1. Collect chain-of-custody specimens	Optional
2. Know and provide appropriate documentation and security for chain-of-custody specimens	Optional

JOB FUNCTION 5: Perform and Assist with Clinical Laboratory Improvement Amendments (CLIA)-Waived Testing

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> CLIA-Waived Tests 	<p><i>This section may include certain knowledge, skills, tools, and technologies specified under job functions 2 and 3.</i></p>	<p><i>This section may include certain knowledge, skills, tools, and technologies specified under job functions 2 and 3.</i></p>

Competency A: Perform waived testing	Core or Optional
PERFORMANCE CRITERIA	
1. Perform waived testing	Core
2. Recognize non-waived tests	Core
Competency B: Set up micro-cultures	Core or Optional
PERFORMANCE CRITERIA	
1. Set up micro-cultures	Core
2. Follow sterile technique to avoid contamination	Core
Competency C: Assist with performance of lab tests	Core or Optional
PERFORMANCE CRITERIA	
1. Recognize and follow instructions from colleagues	Core
2. Assist with performance of lab tests	Core

JOB FUNCTION 6: Maintain Safe Environment

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> • Blood borne pathogen safety • Electrical Safety • Emergency protocols of workplace • Fire Safety • Handling of sharps • Hazardous materials protocols • Patient safety • State and Federal Regulations/ Occupational Safety and Health Administration (OSHA) 	<ul style="list-style-type: none"> • Communication skills • Evaluating information to ensure compliance with standards • Standard procedures of infection control 	<ul style="list-style-type: none"> • Crash Cart • Spill kit

Competency A: Maintain universal precautions	Core or Optional
PERFORMANCE CRITERIA	
1. Remove gloves	Core
2. Wash hands	Core
3. Practice needle-stick safety	Core
Competency B: Follow ergonomic procedures	Core or Optional
PERFORMANCE CRITERIA	
1. Know ergonomic procedures	Core
2. Use ergonomic procedures in appropriate circumstances	Core
Competency C: Maintain secure environment	Core or Optional
PERFORMANCE CRITERIA	
1. Maintain physical security	Core
2. Comply with infection control requirements	Core

Competency D: Handle and dispose of chemical and biological hazards	Core or Optional
PERFORMANCE CRITERIA	
1. Handle chemical hazards	Core
2. Dispose of chemical hazards	Core
3. Handle biological hazards	Core
4. Dispose of biological hazards	Core
Competency E: Perform routine equipment maintenance	Core or Optional
PERFORMANCE CRITERIA	
1. Perform routine equipment maintenance	Core
2. Identify equipment needing replacement and report or restock	Core
Competency F: Participate in disaster preparedness	Core or Optional
PERFORMANCE CRITERIA	
1. Know and follow general actions appropriate for disaster situations	Core
2. Know building evacuation and emergency protocols	Core

JOB FUNCTION 7: Continue Professional Development Education

Related Technical Instruction		
KNOWLEDGE	SKILLS	TOOLS & TECHNOLOGIES
<ul style="list-style-type: none"> State regulations on the scope of practice 	<ul style="list-style-type: none"> Developing and building teams Engaging and completing special assignments Training other medical personnel in phlebotomy or laboratory techniques 	<ul style="list-style-type: none"> Continuing and recertification programs Nationally available resources to keep current in the phlebotomy field Phlebotomy practice arms Phlebotomy practice blocks Phlebotomy practice heels Staff meetings

Competency A: Maintain certification and skills	Core or Optional
PERFORMANCE CRITERIA	
1. Maintain certification and licensure	Core
2. Maintain Cardiopulmonary Resuscitation (CPR) certification	Core
3. Maintain annual compliances	Core
4. Maintain annual competencies	Core
Competency B: Review policies and procedures	Core or Optional
PERFORMANCE CRITERIA	
1. Review policies	Core
2. Update and document policies that are out of date	Core
Competency C: Provide clinical training to others	Core or Optional
PERFORMANCE CRITERIA	
1. Communicate in a professional and educational manner with trainees	Optional
2. Know the appropriate procedures to be trained	Optional

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