

## **PHLEBOTOMY TRAINING FREQUENTLY ASKED QUESTIONS (FAQs)**

**1. Is there a charge for taking the annual refresher course?**

There is no charge for the annual refresher course. There is an \$20.00/hour fee if the observation is performed by Clinical Research Center assessors.

**2. Can the initial training program be paid from departmental or grants funds?**

Usually, yes, but obtain confirmation with the requesting department's administrator.

**3. Will the phlebotomist receive any reminders for either the 6-month post-training or the annual training competency checks?**

- a. No. A phlebotomist may use his/her own calendar to enter due date(s) as a reminder.
  - i. If the phlebotomist uses Outlook calendar, a reminder appointment set to the month maintenance is due can be created. For an annual reminder, use Outlook's reoccurring feature and set for "yearly".
  - ii. Creation of an email reminder sent to the phlebotomist with a "delayed send date" a month before maintenance is due might be helpful.
- b. A supervisor has the ability through administrative access in MyPath to assign a study team member to take the initial training program or the annual competency course. If this occurs, an automatic email alerting of this requirement is sent to the study team member.

**4. The 6-month or annual refresher was not taken (date has past), what should the phlebotomist do?**

Phlebotomist should contact his/her immediate supervisor for guidance.

**5. Why should the phlebotomist's department administrative or supervisor be informed when the phlebotomy training or maintenance has been successfully completed?**

- a. The department administrator may wish to confirm any financial expenses associated with the training; and
- b. The phlebotomist, with their supervisor's access, may want to add this skill to their job evaluation in MyPath.

**6. Why do phlebotomists have to take a phlebotomy refresher every year?**

The annual refresher is required by New York State regulations for both nurses and non-nurses who, in their current role, perform phlebotomy.

**7. How much time should be set aside to complete the annual online refresher course?**

About 60 minutes for the online course and additional time for the demonstration of skill.

**8. Where are the completed skill demonstration attestation documents stored?**

It is the phlebotomist's responsibility to maintain training and competency records. These documents are NOT stored in the MyPath course. Therefore, upon completion of

training or maintenance for purposes of record keeping, the phlebotomist might scan the completed *Phlebotomy Attestation of Skill Demonstration* and any *Phlebotomy Procedure Checklists*, into the department's shared folder for historical documentation.

**9. What standard documents should be kept in a research study's Regulatory Binder regarding those who are required to perform phlebotomy for the study?**

For nurses and non-nurses, noting phlebotomy training on a resume is not adequate documentation. Evidence of training completion must be added to each study's Regulatory Binder for which the phlebotomist is required to perform phlebotomy.

Documents may include:

- a. Completed initial training (*Phlebotomy Statement of Completion*)
- b. 6-month post training competency (*Peripheral Blood Draw Procedure Checklist: 6-month competency assessment*)
- c. Annual competency completion (proof of completed MyPath coursework and completed *Phlebotomy Procedure Checklists* and *Phlebotomy Attestation of Skill Demonstration*).

NOTE: If a sponsor requires "certification", contact an external agency, like Bryant and Stratton College or Board of Cooperative Educational Services (BOCES), to obtain training to become a Certified Phlebotomy Technician and then follow agencies' recommended procedures.

**10. Is there a difference in best practice or requirement between**

- Nurse phlebotomist who uses her licensure in research versus
- Nurse phlebotomist who does not use her licensure in research
- Non-nurse phlebotomist who performs phlebotomy

No, practice is the same for anyone who performs phlebotomy.

**11. What if one possesses phlebotomy skills from an external entity when hired by the University?**

For external new hires that possess phlebotomy skills, the determination of required training is made by the supervisor. Options may include: documenting, per the department guidelines, the past experience; and in MyPath, completing the *Phlebotomy Annual Assessment Collection Review* online course and observing the drawing technique at the time of hire.

- a. What does that documentation look like?  
Same as for Annual Training: Completion of: online course, *Phlebotomy Procedure Checklist* and *Phlebotomy Attestation of Skill Demonstration*.

**12. Who needs to complete the annual training?**

All current phlebotomists are required to demonstrate competency at 6-months post training and yearly thereafter. Speak with the phlebotomist's supervisor or administrator to determine if phlebotomy skills are still required for that individual's role.

**13. Is the Blackboard (Bb) phlebotomy refresher course still available?**

No, the Bb course has transitioned into the MyPath platform.

**14. For a research nurse who has not done phlebotomy in the past, but is now expected to do so. What training is needed?**

The research nurse is required to take the Phlebotomy Orientation Training Program which includes the practicum and observed technique; the 6-month Post-Initial Training Competency Assessment and thereafter, Annual Training.

**15. Where can training for *pediatric* phlebotomy occur?**

Currently there is no internal training for pediatric research phlebotomy. However, for pediatric phlebotomy competency assessment, contact the Pediatric Clinical Resource Nurse (585-406-4415) or Pediatric Vascular Access Nurse (585-276-6659)

**16. Can a research team member self-pay and participate in the Phlebotomy Orientation Training Program?**

The research team member's department pays for initial phlebotomy training because the skill is required for the research team member's current role at the University. Self-pay is not an option for those whose role does not include phlebotomy. However, a research team member who wishes to acquire the skill independently can self-pay and take courses offered by external agencies as Bryant and Stratton College or Board of Cooperative Educational Services (BOCES).