



Clinical Site Letter

Thank you for accepting a Northwood Tech student at your facility for a clinical phlebotomy rotation. This packet will be used while the student is completing their rotation. It is the student's responsibility to ask members of your staff to fill out and initial the appropriate items as they are completed.

The phlebotomy student comes to a clinical site after successfully completing (earning a grade of "C" or better) the Principles of Phlebotomy theory and Basic Lab Skills courses. A student needs orientation(s) specific to your facility's policies and procedures. Brief instruction, demonstration, and quizzing of the student's knowledge prior to the student attempting a new procedure is encouraged. No written testing is required. Quizzes based on ASCP PBT certification exam are completed by the student online through our Blackboard learning platform.

Students are expected to be prompt and arrive at the time that has been decided and stay for the entire shift, following your facility's lunch and break policies. The time and attendance form shall be initialed daily. I will contact your laboratory site contact in the student's first week. During the clinical rotation I will make one site visit. Ideally, this will be about 70 hours into the rotation and will include a meeting with the coordinating site contact and student to discuss the process as well as how the student is performing. **However, if at any time there is an issue (attendance, punctuality, behavior, safety, etc.), please contact me immediately.** I will address the situation and make this the best experience possible for you and the student. I am available to make more visits as deemed necessary.

Northwood Tech students are held to a high standard in the classroom, and it is my hope that they will be held to the same standards of laboratory professionalism while at your facility. It is our desire to produce well-trained phlebotomists for the workforce.

Northwood Tech takes the integrity of this program seriously and will deal with any issues swiftly. Northwood Tech wants to create lasting and beneficial relationships with our clinical sites and will do all that is possible to foster positive experiences.

If at any point you have questions about providing feedback or resolving a performance concern, do not hesitate to contact me. As always, we continue to seek feedback from sites to improve the process.

Thank you again for helping to prepare well-trained phlebotomists.

Sincerely,

Sher McGregor
Phlebotomy Instructor
Northwood Technical College
sher.mcgregor@NorthwoodTech.edu
715-788-7166



Northwood

Technical College

PHLEBOTOMY LAB/CLINICAL HANDBOOK FY25 (2024-25)

NAME _____

DATES OF CLINICAL _____

CLINICAL SITE _____

TABLE OF CONTENTS

GUIDELINES	4
SITE RESPONSIBILITIES	5
TRAINER SIGNATURE SHEET	6
STUDENT RESPONSIBILITIES	7
INSTRUCTOR RESPONSIBILITIES	8
PARTICIPATION INSTRUCTIONS	9-10
PARTICIPATION LOG	11-12
MISCELLANEOUS PROCEDURES INSTRUCTIONS	13
MISCELLANEOUS PROCEDURES LOG	14-17
PROFESSIONALISM, SKILLS, LOG, SCORE SHEET INTRUCTIONS	18
SKILLS LOG SHEET	19-26
WEEKLY PERFORMANCE AND COMMENTS FORM	27-28
SUMMATION LOG	29
SUGGESTIONS FOR TRAINING/COMMENTING	30

Northwood Tech Phlebotomy Program Contact Information

Sher McGregor
Phlebotomy Instructor
Northwood Technical College
sher.mcgregor@NorthwoodTech.edu
715-788-7166

Northwood Technical College

Rice Lake Campus Fall Semester
1900 College Drive
Rice Lake, WI 54868
Phone: 715.234.7082
Fax: 715.234.5172

New Richmond Campus Spring Semester
1019 S. Knowles Ave.
New Richmond, WI 54017
Main Office: 715.246.6561
Fax: 715.246.2777

GUIDELINES

The Lab/Clinical is a hands-on learning experience in which the student applies the knowledge and information acquired in the classroom to develop skills necessary to perform as an entry-level phlebotomist.

Ideally, the student will have the opportunity to observe a variety of techniques as well as the opportunity to explore various techniques. Students should follow best practices in accordance with Clinical and Laboratory Standards Institute (CLSI) standards. Speed should not be a concern until the student has completed 40 successful collections. Following is a sample outline of the Lab/Clinical based on an eight-week rotation:

Day 1 – Orientation to entire clinical facility, lab, and collection areas, as well as clinical site policies and procedures.

Week 1 – Observation of procedures and techniques and performance of venipunctures on “good” veins with direct supervision.

Week 2 – Observation of a variety of procedures and techniques along with more challenging venipunctures with direct supervision.

Week 3 – Observation and performance of a variety of procedures and techniques with both direct and indirect supervision (ex. outside patient room, blood draw station, etc.).

Weeks 4-8 – Observation and performance of a variety of procedures and techniques with indirect supervision (ex. outside patient room, down the hall, etc.). The last few days of the rotation the student should progress to calling for supervision if they need assistance.

Key Points to Consider

- This is a learning experience; therefore, there is no monetary compensation for the time spent at the clinical site.
- This course is worth 2 credits lasting a total of 8 weeks.
- Prerequisites include: a grade of "C" or better in Principles of Phlebotomy and a grade of "C" or better in Basic Lab Skills.
- The student must complete a minimum of 100 hours (maximum of 320 hours) based on clinical site availability. The maximum number of points the student can receive for participation is 120, which equates to 120 hours of clinical work, not including breaks.
- Concurrent employment as a phlebotomist by the same clinical facility is not permitted due to conflict of interest.
- Students must email detailed progress forms to the Northwood Tech Phlebotomy Instructor at the end of each week and complete Blackboard discussion board posts and journals.
- Northwood Tech Phlebotomy Instructor will contact the clinical site representative(s) at the end of week one to assess progress and visit the site once, preferably at 70 hours into the clinical rotation.
- Northwood Tech Phlebotomy Instructor can make more visits as needed if requested by the clinical location or the student.

SITE RESPONSIBILITIES

The **Clinical Site will:**

- Provide a schedule, coordinated with the student, that offers the ability to successfully complete all tasks.
- Submit this schedule to the Northwood Tech Phlebotomy Instructor.
- Provide constructive feedback to the student and instructor.
- Provide a 100-hour clinical experience for one or more students.
- Provide an opportunity for the student to complete all minimum requirements of the clinical experience.
- Provide a welcoming environment conducive to learning.
- Provide a single coordinator to act as the primary contact person on site for student questions and concerns.
- Provide a trainer(s)/preceptor(s) with the following:
 - An interest in helping the student learn.
 - The ability to teach best practices in accordance with CLSI standards.
 - Tolerance of individual student personalities, cultures, and skill levels.
 - Patience and good communication skills.
 - Use the **Weekly Performance Evaluation** as a tool to provide specific feedback to the student to guide progress during the Clinical rotation.
 - Current certification in phlebotomy or clinical laboratory sciences or one year or more of full-time phlebotomy experience in the procedures being taught.
- Indicate any "Miscellaneous Procedures Performed by Clinical Site."
- Complete "**Trainers (Preceptors)**" page indicating certification and years of experience.
- Complete "**Weekly Performance Evaluations**" (total of 4) and discuss with the student.
- Initial individual procedures observed or performed, blood collections performed, and daily attendance to verify student documentation (initials must match those of one of the trainers listed on "Trainers (Preceptors)" log.
- Contact the Northwood Tech Phlebotomy Instructor with any questions, concerns, or problems as soon as they occur.

TRAINERS/PRECEPTORS

Student Name _____

Clinical Site: _____ Clinical Dates: _____

Trainer Name (<i>please print</i>)	Job Title	Certification/ Certifying Agency <small>(ASCP, AMT, etc.)</small>	Years of Experience <small>(Full-time Phlebotomy)</small>	Initials

STUDENT RESPONSIBILITIES

The student **MUST**:

- Abide by all Northwood Tech policies, procedures, and guidelines.
- Abide by all Northwood Tech Phlebotomy Program policies, procedures, and guidelines.
- Abide by all Clinical Site policies, procedures, and guidelines.
- Wear Northwood Tech Phlebotomy Program Student photo ID badge at all times.
- Complete all course requirements as directed.
- Monitor Northwood Tech email daily (M-F) and discuss any questions and concerns with Clinical Site Contact Person and Phlebotomy Instructor as soon as possible.
- Ensure that all documentation pages in the Lab/Clinical Competency Notebook are filled out completely and correctly and initialed by the appropriate trainer(s).
- Report progress by sending required forms to the Phlebotomy Instructor at the end of each week.
- Complete required discussion boards and journals in Blackboard by the end of each week.
- Contact the Phlebotomy Instructor near 70 hours to schedule a site visit.
- Print name at the top of **every** documentation page in space indicated.
- Total and record on the “Competency Checklist – Summation & Grading Tool” page:
 - ✓ Participation hours
 - ✓ Total successful blood collections
 - ✓ Successful venipunctures - vacuum tube (multi-sample/straight needle)
 - ✓ Successful venipunctures – butterfly (vacuum tube)
 - ✓ Successful venipunctures – syringe (butterfly or straight needle)
 - ✓ Successful capillary (dermal) punctures
 - ✓ Success rate (blood collections) (successes ÷ total attempts=%)
 - ✓ Successful miscellaneous procedures required by clinical site (itemized)
 - ✓ Total of scores on Weekly Performance Evaluations including centrifuging and processing, which must at least be observed.

NORTHWOOD TECH PHLEBOTOMY INSTRUCTOR RESPONSIBILITIES

The **instructor MUST:**

- Serve as a resource for both the Clinical Site and the student.
- Serve as a liaison between the Clinical Site and the student.
- Serve as a student advocate.
- Check in with students weekly to assess needs and performance indicators.
- Remove the student from the clinical site in the event of any serious breach of policy, procedure, or guideline (ex. breach of confidentiality, intoxication, repeated tardiness, and/or absenteeism, etc.)
- Contact the Clinical Site to discuss the student's progress after week one and before the 70-hour site visit.
- Calculate grade for Lab/Clinical using "Competency Checklist – Summation & Grading Tool."

PARTICIPATION INSTRUCTIONS

Participation:

The Phlebotomy Lab/Clinical is a minimum 100-hour rotation at a clinical facility. One point toward the overall Lab/Clinical grade is awarded for each hour of participation for a maximum of 120 points. Students completing less than 100 hours will receive a grade of “F” for the Lab/Clinical. Due to potential scheduling difficulties, there is no guarantee that an opportunity will exist for making up hours lost due to absence. Therefore, it is imperative to complete as many scheduled hours as possible.

****Missing a scheduled clinical shift without contacting the site preceptor and Northwood Tech instructor by email and phone will result in loss of clinical site and failure of clinical. Failure due to professionalism prohibits student from petitioning for reentry. ****

Note: In addition to meeting all participation requirements, students must also complete at least the minimum required in each of the other graded competency categories for successful completion of the Lab/Clinical.

Tardiness:

Students should arrive 5 – 10 minutes early to be ready to start training at the beginning of their shifts.

**** One point will be subtracted from the participation grade for each time a student is tardy for the start of a shift or after returning from a break. ****

Note: Students should keep in mind that absenteeism and tardiness may negatively impact future employment opportunities.

Instructions for Completion of Daily Participation Documentation:

Times “IN” and “OUT” should be documented to the exact minute. Short breaks (ex. 10-15 minutes/shift) do not need to be documented.

Students must take a 30-minute break when training for 6 or more continuous hours. This break does not count toward training time. (ex. 8:00-4:30 = 8 hours training)

Each time block (IN / OUT) and the “Daily Totals” must be rounded to the quarter hour and must be confirmed by the trainer. A trainer must initial documented participation time each day.

SAMPLE PARTICIPATION LOGS

Examples:

DATE	IN	OUT	IN	OUT	DAILY TOTALS	POINTS	Trainer Initials
3/4/20xx	0754	1159	1235	1640	8 hours	7.0	Tms / Late from lunch

4 hours before lunch
 5 minutes late for 30-minute lunch (deduct 1 point)
 4 hours after lunch

DATE	IN	OUT	IN	OUT	DAILY TOTALS	POINTS	Trainer Initials
3/5/20xx	8:09 am	12:16 pm	1:15 pm	4:55 pm	7.75 (7 ¾) hours	6.75	Tms / Tardy for shift

Tardy for 8:00 am shift (deduct 1 point)
 4 hours completed before lunch
 1-hour lunch, returned on time
 3.75 (3¾) hours after lunch

MISCELLANEOUS PROCEDURES INSTRUCTIONS

Clinical sites may indicate specific miscellaneous procedures to require the student to observe or perform. The procedure, whether it is to be observed or performed and how many are performed; should be identified.

Note: Student cannot successfully complete the Lab/Clinical (receive a grade of C or better) if all minimum required competencies are not completed and documented correctly.

Students should be allowed and encouraged to perform as many duties as possible. This includes observing (or performing under direct supervision) how non-waived analyzers work, and why the proper collection of samples is important to the patient results. These procedures, and whether they are observed (O) for 1 point or performed (P) for two points, may be recorded on the “Miscellaneous Procedures” tally pages.

Except for those starred items, procedures can be recorded multiple times per day; however, the student should participate in **AT LEAST** five different procedures during their rotation. Items not starred may be performed multiple times per day for credit.

Suggested miscellaneous procedures (this is only a partial listing):

COLLECTION PROCEDURES	LAB PROCEDURES	PATIENT VARIATION PROCEDURES
Timed specimens	Patient instruction (Stool, Post Vas, 24-hour urine collection, etc.)	Isolation (transmission-based precautions)
Peak/trough drugs	* Filing	Post-mastectomy
Special transport required	Reagent preparation	IV therapy
Ankle/foot	Administer skin tests	Anticoagulant therapy
Capillary blood gas	Specimen processing	Obese, edematous
Chain of Custody	Centrifuge/aliquot	During blood transfusion
Therapeutic phlebotomy	* Inventory	Infant/neonate
Point of care testing	*Accessioning	ER, surgery, ICU, oncology, etc.
Blood donors	Prepare/stain blood smears	Parkinson's, etc.
Urine collection	CLIA Waived tests	Psychiatric
Blood cultures	*Computer (data entry, printing specimen labels, etc.)	Pediatric
	Performing assays	

* **Tally once per day.**

If a miscellaneous procedure is a blood collection (ex. Obese, pediatric, etc.), please also mark it on the collection form.

LAB PROFESSIONALISM AND SKILLS, LOG SHEETS AND SCORE SHEET DIRECTIONS

In each procedure, the student must demonstrate competence in patient identification, site selection, technique, and communication skills in addition to collecting the entire blood specimen. If competence is not shown in one of these five areas, the procedure is considered unsuccessful.

Column 1: Select type of collection (V, B, S, C) *V = vacuum tube* (multi-sample/straight needle), *B = butterfly* (vacuum tube), *S = Syringe* (straight needle or butterfly), *C = capillary/dermal puncture*.

Column 2: Was ordered blood sample collected? If a student attempts the same patient twice, and is successful on the second attempt but not the first, annotate as "U/S."

Column 3: Did the student properly ID the patient?

Column 4: Did the student choose the best site possible?

Column 5: Was the communication with the patient appropriate and professional?

Column 6: Did the student perform proper technique and order (tourniquet, alcohol, labeling, etc.)?

Column 7: Comment on what the student did incorrectly, how to fix it, or why they did amazing.

Column 8: Initial

Each time a needle is inserted into a patient, it is one attempt. This page is used to tally only blood collections. Miscellaneous procedures that are blood collections (cultures, timed, etc.) may be used as both a venipuncture and a miscellaneous procedure.

EXAMPLE

Date	Procedure (V, B, S, C)	Successful (S) Unsuccessful (U)	Patient ID (S or U)	Site (S or U)	Communicate (S or U)	Technique (S or U)	Comments (especially if "U") to help improve	Initials
4/1/21	V	U	S	U	S	U	Make sure to check the cephalic vein first. Go in faster. Good angle.	<i>tms</i>
4/1/21	V	S	S	S	S	S	Better job palpating.	<i>tms</i>

****To add more easily, please annotate and separate by clinical week.**

****For grading purposes, student must have at minimum: 90 Vacuum/straight needle draws, 6 Butterfly, 2 Syringe, and 2 Capillary collections****

STUDENT: _____

SKILLS LOG

Date	Procedure (V, B, S, C)	Successful (S) Unsuccessful (U)	Patient ID (S or U)	Site (S or U)	Communicate (S or U)	Technique (S or U)	Comments (especially if "U") to help improve	Initials

Number of successes: _____ / 20 Number of misses: _____ / 20 Percent success (success/20): _____ %

STUDENT: _____

SKILLS LOG

Date	Procedure (V, B, S, C)	Successful (S) Unsuccessful (U)	Patient ID (S or U)	Site (S or U)	Communicate (S or U)	Technique (S or U)	Comments (especially if "U") to help improve	Initials

Number of successes: _____ / 20 Number of misses: _____ / 20 Percent success (success/20): _____ %

STUDENT: _____

WEEKLY PERFORMANCE LOG

1 - Performance unsatisfactory (requires significant improvement, not yet ready for job placement)

****Instructor must be notified if student receives a 1 in any area.****

2 - Performance needs development (routinely needs assistance and/or correction)

3 - Performs satisfactory as a student (needs occasional, moderate assistance)

4 - Performs as well as an entry level phlebotomist (most tasks performed with little to no assistance)

Cognitive/Psychomotor Skills	25 hours	50 hours	75 hours	100+
Has a good working knowledge of procedures after they have been presented, demonstrated, and discussed				
Remembers and follows directions after they have been given				
Performs patient identification procedures				
Performs labeling and other documentation procedures				
Performs transportation according to CLSI standards				
Applies previous knowledge and skills to new procedures and situations				
Appropriately uses centrifuge				
Performs correct processing procedures				
Uses proper terminology				
Affective Skills	25 hours	50 hours	75 hours	100+
Communicates/interacts with patients; empathetic				
Communicates/interacts with family members/visitors				
Communicates/interacts with trainers and/or supervisors				
Communicates/interacts with other clinical staff/students				
Adheres to dress code; has professional appearance				
Conducts self in a professional manner				
Observes appropriate breaks/mealtimes				
Seeks out tasks/activities to fill in "down time"				
Attends all practical hours as scheduled				
Arrives on time for all clinical hours; stays for entire scheduled time				
Maintains confidentiality				
Maintains integrity of the profession, ethics, CLSI best practices, pride in profession, honesty, etc.				
Interested in learning new processes/techniques				
Complies with safety, infection prevention and precaution policies				
Uses appropriate terminology				
Maintains a clean, safe work environment				
Assesses patients for signs and symptoms of problems that may affect collection				
Manages time effectively				
Initials				
TOTAL				

Add weekly totals for score to enter in summation log _____

STUDENT: _____

WEEKLY PERFORMANCE COMMENTS

Explain any deficits the student may have. Provide both positive and constructive feedback.

25 HOURS Date _____ Initials _____

50 HOURS Date _____ Initials _____

75 HOURS Date _____ Initials _____

100+ HOURS Date _____ Initials _____

STUDENT: _____

SUMMATION LOG

For students to pass this course, they must 1: earn at least 80% of the total possible points (800/1000), AND 2: meet all requirements in the “Minimum Required to Pass Course” column. Earning 80% without meeting all requirements listed in this column will result in a grade of “F”. Meeting only the requirements listed in this column will not result in earning enough points (only 787) to achieve the required 80% to successfully complete the Program. You must complete as many collections, miscellaneous procedures, journal entries, etc., as possible to earn the required 80% of total possible points.

SCORE SHEET

- Minimum of 100 hours (Points are earned for up to **120** hours.) Students must inform the Program Director and the clinical facility if they will be tardy or absent via phone call and email. Students will not earn participation points for hours not attended.
- Minimum of 100 unaided successful blood specimen collections up to 120 points. Additional blood collections of any of the above to complete the required 100 minimum blood collections.
- Minimum of 83% success rate – student will need to keep collecting successful draws to bring percentage up.
- Observe or perform a minimum of 40 miscellaneous procedures (Up to **60** points may be earned). At least 5 different types of miscellaneous procedures must be performed or observed. For suggestions of miscellaneous procedures that may be observed or performed, refer to the list of “Miscellaneous Procedures”.
- Weekly student performance evaluations completed by trainer(s)

Clinical Log Scoring

Competency	Minimum	Maximum Allowed	Student Earned
Participation Hours	100	120	
Unaided, successful evacuated tube collection	90	105	
Unaided, successful butterfly	6	10	
Unaided, successful syringe	2	5	
Unaided, successful capillary	2	5	
Miscellaneous procedures (at least 5 different types)	40	60	
Weekly Performance evaluations	324	408	
TOTAL	564	713	

Student Tracking Log to keep track of points earned in Blackboard.

Assignment	Minimum	Maximum Allowed	Your Total
Journals (10) 2 pts each	16	20	
Discussion board (10) 2 pts each	16	20	
ASCP Assessments (3) 20 pts each	48	60	
Total	80 (80%)	100	

Overall collection success rate (success/total attempted)	Minimum: 83%	Maximum: 100%	
---	--------------	---------------	--

Total points for entire rotation	644	813	
---	------------	------------	--

Examples for Training and Commenting on Student Evaluation Forms

Preparation

- Explain expectations.
- Make decision about the training process together.
- Provides a positive learning environment.

Have you read the procedure we will be performing?

Do you know what equipment/supplies you will need?

Do you have any questions?

Practicing

- Student observes a demonstration of the procedure.
- Observe the student perform the procedure.
- Make suggestions for improvement.

Are you ready to observe?

Are you ready to perform the procedure?

Are you getting more confident?

Is it becoming more automatic or comfortable?

Do you feel like you are finding your rhythm?

Praising

- Be specific on what was good about the performance.
- Help build confidence in the beginning.
- Provides enthusiasm and motivation.

Now that you are doing well with this, are you ready to try?

You seem to be confident/fluent in this we should move on to the next level.

What would you like to try next?

Constructive criticism

- Behavior must be corrected but learning must still happen.
- Student should be treated fairly with the outcome of improved technique/behavior.
- Able to resolve problems quickly.

Your performance is not as efficient as we would like to see, but your accuracy is great.

You skipped a few steps so let's talk through it again. What will help to make it stick next time?

Could you tell me what you think you missed? When did you realize your mistake? Would you like to make a plan to prevent that for next time or would you like me to work with you on one?

That can be tricky. Let's go over it one more time together.

Sample Evaluation comments

Always appears professional and ready.

May need to review a few uncommon med terms.

Practices standard precautions.

Could use more practice on different types of precautions rooms.

Great technique but, needs to improve on confidence.

Appears to have a good understanding of precautions.

Getting comfortable with the LIS.

Eager to participate.

Would be nice if more questions were asked.

This is not an all-inclusive list but includes examples of what type of feedback is helpful. Not all areas need a comment, but please document positive reinforcement and improvement comments to guide the student to better performance. THANK YOU for being involved in the student's development.