

# Phlebotomy Technician Externship Knowledge & Skills

Learner name: \_\_\_\_\_

When the learner has completed each item, initial and rate the learner's demonstration of knowledge and skill. Feel free to add your observations in the comments section.

**Rating Scale:**

- 1 - Not evident
- 2 - Approaching standard
- 3 - Meeting standard
- 4 - Above standard
- 5 - Distinguished
- N/A - Not applicable

Standard 1: Personal/Interpersonal Knowledge and Skills		Rate 1-5 or N/A	Preceptor Initials
1.1	Demonstrates ethical conduct in all job-related activities.		
1.2	Presents an image appropriate for the profession in appearance and behavior.		
1.3	Demonstrates active and engaged listening skills.		
1.4	Communicates clearly when speaking and in writing.		
1.5	Demonstrates a respectful attitude when interacting with diverse patient populations.		
1.6	Applies self-management skills, including time management, stress management, and adapting to change.		
1.7	Applies interpersonal skills, including negotiation skills, conflict resolution, and teamwork.		
1.8	Applies critical thinking skills, creativity, and innovation to solve problems.		
Comments:			

<b>Standard 2: Safety and Compliance</b>		<b>Rate 1-5 or N/A</b>	<b>Preceptor Initials</b>
2.1	Adheres to regulations regarding workplace safety (e.g., OSHA, NIOSH).		
2.2	Adheres to regulations regarding operational standards.		
2.3	Adheres to HIPAA regulations regarding protected health information.		
2.4	Adheres to scope of practice and complies with ethical standards applicable to the practice of phlebotomy.		
2.5	Performs quality control for laboratory equipment (e.g., maintain logs for equipment inspection, reporting and troubleshooting equipment issues).		
2.6	Performs quality control (e.g., machine calibration, test controls, storage controls) for CLIA-waived tests.		
2.7	Identifies and disposes of sharps and biohazards according to Bloodborne Pathogens Standard.		
2.8	Follows exposure control plans in the event of occupational exposure.		
2.9	Follows transmission-based precautions (e.g., airborne, droplet, contact).		
2.10	Follows standard precautions regarding personal protective equipment (e.g., gloves, gowns, masks, shoe covers, respirators).		
2.11	Uses aseptic and infection control techniques throughout the phlebotomy process.		
2.12	Follows hand hygiene guidelines to prevent the spread of infections.		
2.13	Initiates first aid and CPR when necessary (e.g., check for DNR bands).		
2.14	Complies with documentation and reporting requirements.		
Comments:			

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<b>Standard 3: Patient Preparation</b>		<b>Rate 1-5 or N/A</b>	<b>Preceptor Initials</b>
3.1	Introduces yourself to the patient and provides information, such as name, title, and department.		
3.2	Positively identifies the patient based on specific identifiers while following HIPAA guidelines.		
3.3	Receives implied, informed, or expressed consent from the patient. Reviews and clarifies the requisition form.		
3.4	Verifies patient compliance with testing requirements (e.g., fasting, medication, basal state) and proceeds accordingly.		
3.5	Interviews patients to identify special considerations that may impact collections (e.g., allergies, medications, recent surgeries, history of fainting) and proceeds accordingly.		
3.6	Explains the phlebotomy procedure to be performed to the patient.		
3.7	Positions the patient to maximize comfort and safety and optimize specimen collection.		
3.8	Determines site for specimen collection, based on the Clinical and Laboratory Standards Institute standards, to minimize patient risk and optimize outcome.		
3.9	Instructs patients on collection of non-blood specimens (e.g., stool, urine, semen, sputum).		
Comments:			

<b>Standard 4: Routine Blood Collections</b>		<b>Rate 1-5 or N/A</b>	<b>Preceptor Initials</b>
4.1	Selects and assembles equipment (e.g., evacuated tube system, syringe, winged collection set) needed for blood collection(s).		

4.2	Verifies quality of equipment (e.g., sterility, expiration date, manufacturer's defects).		
4.3	Follows standard tourniquet application and removal procedures.		
4.4	Selects final site through, observation and palpation, for specimen collection.		
4.5	Applies antiseptic agent to blood collection site.		
4.6	Anchors below the venipuncture site.		
4.7	Inserts venipuncture device.		
4.8	Follows order of draw when performing venipuncture.		
4.9	Ensures patient safety throughout the collection by identifying problematic patient signs and symptoms (e.g., syncope, diaphoresis, nausea, seizure).		
4.10	Recognizes and responds to potential complications resulting from procedure (e.g., lack of blood flow, hematoma, petechiae, nerve pain).		
4.11	Removes venipuncture device.		
4.12	Inverts evacuated tubes with additives according to procedural guidelines.		
4.13	Performs dermal puncture for capillary collection based on patient age and condition.		
4.14	Follows order of draw when performing capillary collection.		
4.15	Labels all specimens.		
4.16	Performs post-procedural patient care.		
4.17	Perform a minimum of 30 venipunctures (See page 7)		
4.18	Perform a minimum of 10 capillary punctures (See page 8)		

Comments:

<b>Standard 5: Special Collections</b>		<b>Rate 1-5 or N/A</b>	<b>Preceptor Initials</b>
5.1	Prepares peripheral blood smears.		
5.2	Performs blood culture collections.		
5.3	Assists other healthcare professionals with specimen collection.		
5.4	Collects blood samples for inborn errors of metabolism (e.g., PKU, galactosemia).		
5.5	Performs phlebotomy for blood donations.		
5.6	Calculates volume requirements in patients who are at higher risk (e.g., pediatric, geriatric) to avoid causing iatrogenic anemia.		
5.7	Performs non-blood specimen collection (e.g., throat cultures, nasal swab, wound cultures).		
Comments:			

<b>Standard 6: Processing</b>		<b>Rate 1-5 or N/A</b>	<b>Preceptor Initials</b>
6.1	Prepares specimens (e.g., centrifuging, aliquoting, freezing or refrigeration) for testing or transport.		
6.2	Maintains integrity of specimens based on handling requirements (e.g., temperature, light, time).		
6.3	Adheres to chain of custody guidelines when required (e.g., forensic studies, blood alcohol, drug screen).		
6.4	Coordinates communication between non-laboratory personnel for processing and collection.		
6.5	Inputs and retrieves specimen data using available laboratory information system.		
6.6	Recognizes and reports critical values for point of care testing.		
6.7	Distributes laboratory results to ordering providers.		



Comments:

Site Supervisor or Preceptor's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Site Supervisor or Preceptor's Title: \_\_\_\_\_

The completed form can be submitted via email to [externships@careerstep.com](mailto:externships@careerstep.com) or fax to (801) 407-1951.

<b>Venipuncture</b>			
Method		VV: Venipuncture Vacuum or SYR: Syringe or WI: Winged Infusion	
	Date	Method	Signature
1			
2			
3			
4			
5			
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<b>26</b>			
<b>27</b>			
<b>28</b>			
<b>29</b>			
<b>30</b>			

<b>Capillary</b>		
	<b>Date</b>	<b>Signature</b>
<b>1</b>		
<b>2</b>		
<b>3</b>		
<b>4</b>		
<b>5</b>		
<b>6</b>		
<b>7</b>		
<b>8</b>		
<b>9</b>		
<b>10</b>		

NOTE: 30 Venipuncture and 10 Capillary are required to sit for the CPT with NHA.