



CERTIFIED PHLEBOTOMY TECHNICIAN (CPT)
CLINICAL HANDBOOK & LOG

Preface

You are enrolled in a MedCerts program that will allow you to sit for the National Healthcareers Association's Certified Phlebotomy Technician Certification (CPT) exam as either your target or secondary certification. The CPT certification exam has clinical components that will take place outside of MedCerts and will require some additional guidance. To ensure you have all of the necessary tools and knowledge to be successful, the Student Success and Career Services teams at MedCerts have put together this Clinical Handbook. We encourage you to take full advantage of this handbook and all of its content.

Inside you will find:

- ✓ **Tips and tricks for locating clinical sites**
- ✓ **Check list and rubric for creating your resume**
- ✓ **Guidance for requesting MedCerts sponsorship**
- ✓ **and much more**

Of course we want to remind you that you are not alone! If you need further assistance, have questions, need that boost of encouragement, please drop a line to your Student Success Advisor. They are here for you and will work with you to become one of the Healthcare's World's Newest Phlebotomy Technicians!

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Clinical Overview

The Certified Phlebotomy Technician (CPT) certification, awarded by the National Healthcareer Association (NHA), requires the minimum clinical requirements set forth in this handbook. These clinical requirements ensure that all individuals who pass the CPT certification exam have received the necessary hands-on experience needed to be a successful practicing Phlebotomy Technician in the field.

Students are encouraged to begin seeking out clinical site opportunities in their area as soon as they begin their MedCerts' program. MedCerts does not place students with clinical sites nor guarantee that students will be able to locate a site within the required timeframe set forth in this handbook. If required by the site, MedCerts will sponsor students who successfully locate and secure a clinical site, although not all clinical sites require site sponsorship. Sponsorship guidelines and procedures can be found in the Site Sponsorship section of this handbook.

To show proof of fulfilled clinical requirements, the clinical log located within this handbook must be submitted to MedCerts with a clinical site manager's signature before or within 180 days (approximately 6 months) of passing the CPT certification exam.

Students who fail to fulfill the clinical requirement and submit proof by the deadline may have their certification revoked by NHA and will be required to take and pass the certification exam an additional time.

Clinical Requirements

Clinical Competencies: 30 venipunctures
10 capillary sticks

These clinical requirements will be demonstrated in person at a clinical site in the presence of a site-approved individual (supervisor or manager). The site's approved manager or supervisor must sign the clinical log prior to the log being submitted to MedCerts.

MedCerts reviews all log submissions, ensuring the information provided is accurate and meets the minimum NHA clinical requirements. Logs submitted without a signature will be rejected and will need to be reviewed and signed by the clinical site's approved manager or supervisor.

Students who submit logs signed by any individual who is found not to be the clinical site's approved manager or supervisor may be subject to disciplinary action to the severity of termination from the clinical site and dismissal from their MedCerts program. See additional details found in the MedCerts' Professional Standards & Policies section of this handbook.

Steps to Securing a Clinical Site

MedCerts Career Coaches are here to help, but students are responsible for securing their own clinical sites to complete their certification requirements.

Step 1: Create a list of potential clinical sites in your area.

Clinical requirements can be completed at one of many different medical locations, such as, but not limited to:

- Dialysis Clinics
- Blood Bank Clinics
- Outpatient Clinics
- Hospitals

Step 2: Contact potential sites and inquire about clinical opportunities. You may have the most success reaching the supervisor or manager if you call the site, but you can also try to send an email (see sample email language below).

Step 3: If the site is willing to host you, check to see if they require MedCerts sponsorship. Be sure to gather contact information for the site supervisor or manager (Name, email, phone number, address of site).

Step 4: Once you have secured a site, please complete the [Clinical Site Information Form](#).

Step 5: Complete any documents required by the clinical site and confirm your start date. You may be required to have a criminal background check and complete a drug screening assessment. Please see the section in this handbook below on “Criminal Background Check, Drug and Other Screenings.”

Step 6: Document your requirements on the Clinical Log form, and return your completed form to the MedCerts Clinical Coordinator (jpriest@medcerts.com). Once received and approved, the Clinical Coordinator will release your National Certification to you.

Identifying and Securing a Clinical Site:

Clinical site opportunities can be either unpaid volunteer positions or paid employment positions, depending on the site and their needs. Some healthcare facilities may prefer to hire you and give you the supervision you need to complete your clinical requirements upon employment.

The following are some recommendations from the MedCerts Career Services team that you can utilize as you begin the process of locating and securing your clinical site.

Some strategies for identifying appropriate clinical sites include:

- Search online job websites (Ex: Indeed, ZipRecruiter, Linked In, NHA.com) to find sites that may offer paid positions that would allow you to complete your clinical requirements.
- Network with friends and family to see if they have any connections to healthcare facilities.
- Healthcare professionals have many connections to a variety of facilities, and they may be able to refer you to their colleagues.
- Utilize social networking platforms (social media, Twitter, Facebook) to let people know that you’re looking for a clinical site to complete your hands-on certification requirements.

- Consider volunteering or job shadowing at a hospital or clinic while going through your program, to build relationships there and make some key connections. (Remember that job shadowing does not count towards completing your clinical log as the requirement is to be done by the student on live persons.)

Approaching employers:

- Be well-prepared and treat this like you would a job search.
- Develop and polish your resume. Writing a resume may sound daunting, but these [Tips for Writing a Standout Resume](#) will help you to get started. You can also use this [Resume Rubric](#) (checklist) to make sure you've covered all the bases.
- Identify the appropriate department and person to approach, which may include the education department, volunteer department, or someone in human resources.
- Prepare customized cover letters for each site you approach. A cover letter is a way to briefly introduce yourself to the employer and share your goals. The letter is a chance to demonstrate your professionalism and clarify your clinical requirements.
- Email or hand deliver your resume and cover letter.
- Communicate promptly and professionally with the site.
- Dress professionally for the meeting or interview (Look your best!)

Helpful resources:

- [Keys to communicating effectively](#)
- [Professional job searching](#)
- [Email etiquette](#)

Sample email message to Clinic Supervisor/Manager:

Hello,

My name is [Student Full Name], and I'm a student at MedCerts (www.medcerts.com). I've recently completed a training program to prepare me for the Certified Phlebotomy Technician (CPT) certification through the National Healthcareer Association (NHA). I've passed my exam [or I'm planning to take my exam soon], and I need to complete 30 venipunctures and 10 capillary sticks to fulfill the certification requirements.

Would it be possible to complete these requirements at your clinic? If required, MedCerts can sponsor me by providing a Certificate of Insurance with a signed Affiliation Agreement. You can reach me at [phone number] to discuss the details of my requirements.

Thank you for your consideration. I look forward to talking with you soon.

Sincerely,

[Student Full Name]

[Phone number]

Clinical Site Sponsorship & Process

Some clinical sites may require “sponsorship” from MedCerts, which often includes a signed Affiliation Agreement and Certificate of Insurance. MedCerts can reach out to the site on your behalf once this [Clinical Site Information Form](#) (link here?) has been completed.

MedCerts reserves the right to approve or deny site requests. The site is required to meet minimum clinical requirements as set forth in the ‘Clinical Requirements’ section above. MedCerts also reserves the right to deny sponsorship for a clinical site, if it is determined that the site is not able to meet the minimum clinical requirements.

To request sponsorship, the [Clinical Site Information Form](#) must be completed. A member of the MedCerts’ Career Services team will review the site information to determine if the location is suitable to meet your clinical requirements. You will be notified of the decision, and if sponsorship is required, the Clinical Coordinator will arrange this with the site supervisor.

MedCerts’ Professional Standards & Policies

Students are expected to adhere to MedCerts’ professional standards as set forth in this section, as well as the standards set forth by the clinical site, at all times throughout the duration of a student’s time at the clinical site. Students found violating these standards may be subject to disciplinary action to the severity of termination from the clinical site and dismissal from their MedCerts program.

MedCerts has established the following Professional Standards to ensure the success of the student and the continued professional relationship between MedCerts and the clinical site. Student’s receiving MedCerts sponsorship will be required to sign the MedCerts’ Sponsorship Agreement, indicating the student understands and agrees to meet all Professional Standards set forth below.

Attendance:

Take every precaution to avoid any absences from your Clinical Site position, since dependability is a professional expectation of all healthcare facilities. If you are unable to attend all scheduled shifts due to illness or emergency, please notify your clinical site’s manager or supervisor as soon as possible. Clinical site leave must be approved based on the policies set forth by the clinical site.

Confidentiality:

Students are required to maintain confidentiality of patient information in accordance with HIPAA (Health Insurance Portability and Accountability).

Professional Dress Code:

Appropriate dress standards have been established to present and maintain a professional appearance to patients, visitors, and the healthcare team. The standards allow comfortable performance of duties and promotion of safety and infection control.

- **ID badge** if required, must be worn at all times as required by the clinical site (i.e., above the waist with name visible).
- **Hair** must have a clean and neat appearance with shoulder-length hair pulled back. Facial hair must be clean, neat, and well groomed.
- **Headgear**, religious or culture in nature, may be worn.
- **Jewelry** must be appropriate and professional, and not present a safety hazard when working with patients or equipment. Students must be prepared to remove jewelry and/or piercings as required by clinical site.
- **Tattoos** must be covered as required by the clinical site.

- **Attire** as required by the clinical site, i.e. clean and ironed scrubs or uniforms and OSHA-compliant shoes. No denim, short skirts, sweatshirts, low necklines, tank tops, halter tops or T-shirts with advertising or offensive graphics, sweatpants, jogging pants, leggings, or shorts (or any other attire deemed inappropriate by site).
- **Fragrances**, such as perfume or cologne, may cause allergic reactions in others and may not be worn.
- **Fingernails** must be neat, clean, and trimmed as not to extend beyond the tips of the fingers; no artificial nails are allowed.

Criminal Background Checks, Drug & Other Screenings Policy

Some clinical sites may require screening prior to placement. **Students are responsible for all required screening(s) and applicable fee(s).** The requirements and types of screening are dependent on the requirements of the site. Potential fees, which vary per state, include but are not limited to, a background check, drug screening, Basic Life Support (BLS) for Healthcare Providers, (CPR) certification, TB tests, and required immunizations. Students should speak with their clinical site for more information about potential screening(s) and applicable fee(s).

MedCerts does not perform criminal background checks, nor do we test students for illicit drug use. Please be advised that the student's drug, criminal, or immunization status may prevent future employment as a healthcare or IT (Information Technology) professional. Clinical sites, employers, and State Boards, or other regulatory boards have regulations about drug use and criminal backgrounds. Regulatory boards, clinical sites, employers, and other organizations that may require these screenings for placement, and adverse results may prohibit you from completing the clinical requirements.

The student understands that MedCerts does not hold any control over the drug, immunization, criminal, or background screening processes or policies held by any organization outside of MedCerts.

Clinical Logs

Below are link(s) to blank clinical documentation log(s) associated with your certification(s). Please provide the blank log(s) to your clinical site's designated manager/supervisor for them to complete, sign and email to the MedCerts Clinical Coordinator at jpriest@medcerts.com

- [Certified Phlebotomy Technician \(CPT\) Clinical Documentation Log](#)

Example of a completed log



Certified Phlebotomy Technician (CPT) Clinical Documentation Log

Student Name	Sally Smith		
Student Date of Birth	01/01/1990	Student Email	exampleemail@email.com

Clinical Site	Medical Practice Name		
Site Manager/Supervisor Name	Donald Larson		
Clinical Site Address	1000 MedCerts Lane, Suite 100		
Clinical Site Phone	(000)000-0000		
Clinical Site Email	MedicalPractice@email.com		

VENIPUNCTURE LOG: Must successfully complete a minimum of 30 venipuncture on live individuals.

TYPE		METHOD		
VP	CP	EV	SYR	WI
Venipuncture	Capillary Puncture	Evacuated	Syringe	Winged Infusion
	DATE	TYPE	METHOD	PRECEPTOR'S SIGNATURE
1	01/01/2021	VP	EV	<i>Donald Larson</i>
2	01/01/2021	VP	SYR	<i>Donald Larson</i>

CAPILLARY LOG: Must successfully complete a minimum of 10 capillary punctures on live individuals

	DATE		Method	PRECEPTOR'S SIGNATURE
1	01/20/2021	CP	EV	<i>Donald Larson</i>

Approver Signature *Donald Larson*

Date Signed 02/01/2021

Resources

The following are resources found throughout this handbook.

Resource Link	Resource Description
Resume Rubric	Checklist to make sure you've included everything.
Tips for Writing a Standout Resume	Guide to creating a professional resume.
Keys to Communicating Effectively	Guide to effectively communicating with potential sites.
Professional Job Searching	Tips and Tricks for job searching.
Email Etiquette	Guide to writing & responding professionally to emails.
Clinical Site Information and Sponsorship Request Form	Form for submitting site info & requesting sponsorship.
Clinical Log Sheet	Blank log to record clinical requirements.

