



## **Canadian Phlebotomy Technicians Group Inc.**

P.O Box 36060 Northgate Brampton ON L6S 6A6

T: 416-817-9516 T: 905-216-3339

website:[www.mycptg.ca](http://www.mycptg.ca) e-mail:[info@mycptg.ca](mailto:info@mycptg.ca)

# Certified Phlebotomy Technician (CPT)

CANDIDATE'S COMPETENCY HANDBOOK

Expected Entry-Level Phlebotomy Technician Competencies

June 2020

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## Mission

The Canadian Phlebotomy Technician Group Inc. was federally incorporated in 2019 to enhance patient care, advance competency skills as well as support Phlebotomy Technicians in their field of practice.

After meticulous consideration, time, and effort, the Certified Phlebotomy Technician (CPT) exam was developed and is offered throughout Canada as well as Internationally each year. The Canadian Phlebotomy Technician Group Inc. firmly believes that both practical skills along with theory should be assessed before an individual can become certified and as such, our CPT exam covers a vast array of skills and knowledge with a practical component incorporated as part of the certification process. Our organization also provides members with free access to Continuing Professional Development (CPD) courses for certification maintenance and to keep current with changes in the phlebotomy field. Our goal is to provide assurance to employers and the public of competent healthcare providers who meet Canadian standards for phlebotomy practice. The CPT certification also provides individuals with increased employment opportunities which enables them to progress professionally. We strive for excellence and aim to foster an inclusive, diverse, cooperative environment for health professionals.

Canadian Phlebotomy Technician Group Inc. is proud to administer the **National Certification Phlebotomy Technician Exam.**



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## The Profession

Phlebotomy Technicians have a critical role within the healthcare system and are considered vital frontline members of the health care team.

Phlebotomy Technicians are specialized in specimen collection for laboratory tests that are necessary for the diagnosis and care of patients. Some facilities utilize Phlebotomy Technicians as Laboratory Assistants, who are skilled in performing various procedures such as venipuncture, micro-collection, and specimen processing while ensuring patient safety and confidentiality. Phlebotomy Technicians obtain blood for screening, transfusion and diagnostic purposes, as well as obtain specimens for therapeutic objectives.



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## Ethics

Ethics is a system of moral principles or standards that establishes conduct and the distinction between right and wrong. A Phlebotomy Technician should recognize that there are policies designed to guide what should or should not be done by those who work in the healthcare environment.

### Professionalism

Professionalism is defined as the conduct and qualities that characterize a professional individual. As part of a service-oriented industry, individuals performing phlebotomy must practice professionalism.

### Integrity

Integrity is a personal feeling of “wholeness” derived from honesty and consistency of character that can be seen in the person’s actions, values, and beliefs. Professional standards of integrity or honesty require an individual to do what is right regardless of the circumstances and in all situations and interactions.

### Compassion

Compassion is a human emotion prompted by others’ experiences and concerns; it is considered to be one of the greatest of virtues. Compassion entails being sensitive to a person’s needs and willing to offer reassurance in a caring and humane way. A Phlebotomy Technician may show compassion by appreciating the fear that an illness or the unknown generates, by using empathy to sense others’ experiences, and by demonstrating a calm and helpful manner towards patients’ needs.

### Patients’ Rights

Every patient in a healthcare setting has rights and should be informed of these rights when care is initiated. The first priority of all healthcare professionals, including Phlebotomy Technicians, is to provide high-quality patient care in a clean and safe environment, while maintaining the patient’s personal rights and dignity by being cognitive to differences in culture, race, religion, gender, and age.

### Confidentiality

Patient confidentiality is seen by many as the ethical cornerstone of professional behavior in the healthcare field. It serves to protect both the patient and the practitioner. The Phlebotomy Technician must recognize that all patient information is entirely private and confidential. Phlebotomy Technicians are bound by various laws to maintain the confidentiality of each individual’s health information.



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## Scope of Practice

The CPT competency guidelines are designed as practice standards for entry-level practitioners and must be met for certification. A Phlebotomy Technician is required by legislation to work under the supervision of a regulated licensed professional. The scope of practice for Phlebotomy Technicians may include but are not limited to the following:

- Performing venipuncture
- Performing capillary blood draws
- Positively identifying patients via ID, medical records or other means
- Reading requisitions and labeling samples correctly
- Respecting patient rights and maintaining confidentiality
- Maintaining professional interactions with patients
- Maintaining sample integrity during specimen collection and the transport process
- Transporting specimens to laboratories
- Ensuring proper documentation and data entry

## Additional Duties as Required

- Assisting in collecting and documenting monthly workload and record data records
- Performing quality-control protocols as specified in standard operating procedures and performing and documenting instrument and equipment maintenance
- Performing appropriate laboratory computer information operations
- Providing proper instruction to patients/customers for container specimen collection
- Training new phlebotomy technicians and students about duties and responsibilities



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## Certificate vs. Certification

<b>Certificate Program</b>	<b>Professional Certification</b>
Result of an educational process	Assesses knowledge, skills, and/or competencies previously acquired
Indicates completion of a course or series of courses with a particular focus	Validate the participant's competency through a conformity assessment system
Assessment is used to evaluate the intended learning outcomes; Course content set through academic process	Assessment is best used to assure baseline competencies and to differentiate professionals; independent of a specific learning event
Assessment content may be narrower in scope	Assessment content is usually broad in scope. Standards set through an industry-wide process
Awards a certificate to recognize specific learning outcomes; Demonstrates knowledge of course content	Awards credential to recognize achievement. Typically, results in a designation to use after one's name eg. Jane Doe, CPT



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## Exam Blueprint Summary

### Certification Exam Information

<b>Multiple Choice Questions (MCQ)</b>	<b>100</b>
<b>Exam Delivery</b>	<b>Paper</b>
<b>Time allotted</b>	<b>2.5 hours</b>

<b>Exam Content Domains</b>	<b>Number of Items by Content Domain</b>	<b>Weighting by Content Domain</b>
Anatomy and Physiology	8-12	8-12%
Phlebotomy Procedure, Specimen Handling and Processing	23-27	23-27%
Tubes Colors and Additives	13-17	13-17%
Good Clinical Practice/ Safety and Infection Control	5-9	5-9%
Patient ID and Patient Care	11-15	11-15%
Site Preparation	5-9	5-9%
Order of Draw and Equipment Selection	13-17	13-17%
Medical Terminologies and Abbreviations	6-10	6-10%
<b>TOTAL</b>	<b>100</b>	<b>100%</b>

**Note:** The method of exam scoring is determined using the Automated Scoring on the Measure Testing Platform.



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## Exam Content Subdomains

### 1. Anatomy and Physiology

- 1.01 Determine commonly used veins for venipuncture
- 1.02 Veins vs. Arteries, the difference and location
- 1.03 Integumentary system, functions and structure
- 1.04 Function of the cardiovascular system and how it relates to phlebotomy
- 1.05 Body planes and cavities
- 1.06 Blood composition, blood disorders and diagnostic testing
- 1.07 Integumentary system, functions

### 2. Tubes Colors and Additives

- 2.01 Identify appropriate tubes for commonly ordered tests
- 2.02 Identify additives/anticoagulants added to blood collection tubes
- 2.03 Serum Separator Tube (SST) vs. Plasma Separator Tube (PST)
- 2.04 Serum vs. Plasma, the difference, how samples are obtained

### 3. Good Clinical Practice /Safety and Infection Control

- 3.01 Use of appropriate PPE to ensure personal safety as well as maintaining patient safety at all times
- 3.02 Proper disposal of blood and other biohazardous fluids
- 3.03 Proper disposal of sharps in accordance with policies and S.O.P
- 3.04 Appropriate and safe use of phlebotomy equipment
- 3.05 How to report and respond to any injuries appropriately
- 3.06 Proper techniques when handling patients on isolation



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## **4. Site Preparation**

- 4.01 Cleansing of the site using the appropriate cleaning agent
- 4.02 Assess pre-analytical errors that can affect test results positively or negatively (eg. site recontamination, prolong tourniquet use, fist pumping, not allowing alcohol to dry before venipuncture)
- 4.03 Identify appropriate collection site based on lab requisition, accessibility, patient age and patient condition
- 4.04 Recognize the difference between veins and arteries when identifying the collection site

## **5. Order of Draw and Equipment Selection**

- 5.01 Inversion times for vacutainer tubes
- 5.02 Drawing discard tubes, when and for which test
- 5.03 Consequences when the order of draw isn't followed
- 5.04 Selection of appropriate equipment for blood collection (eg. needle length and gauge based on type of patient, lancets for dermal puncture, gauze pads, bio-hazard bags, gloves, equipment carrier, needle and sharps disposal container, tourniquet, evacuated tube system)
- 5.05 Selection of proper antiseptic agents for test ordered (eg. blood culture)
- 5.06 Ensure all equipment and collection tubes are up to date and are of first time use only

## **6. Patient ID and Patient Care**

- 6.01 How to reduce patient anxiety for specimen collection procedure (eg. use of local anesthesia for patients with needle phobia)
- 6.02 How to prepare the patient mentally and physically for specimen collection using appropriate techniques and procedures
- 6.03 Methods to obtain informed consent from patient following appropriate protocols
- 6.04 Monitor patient safety and comfort during and after the blood collection process
- 6.05 Document patient and collection information
- 6.06 Bandaging selection
- 6.07 Positively identify patients using proper procedures (eg. wristband, D.O.B, health card, photo ID)
- 6.08 Evaluate pre-test conditions for patients prior to blood collection (eg. fasting, medication monitoring)



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## **7. Phlebotomy Procedures, Specimen Collection, Handling and Processing**

- 7.01 Blood collection from veins by vacutainer or syringe method
- 7.02 Blood collection from capillaries by dermal puncture (eg. finger and heel stick)
- 7.03 Angle of insertion for venipuncture (eg. 15-30 degrees with bevel of needle up)
- 7.04 Collect specimen samples following the Clinical and Laboratory Standards Institute (CLSI) recommended order of draw and special test consideration
- 7.05 How to obtain specimens on difficult to “draw” patients using correct techniques and procedures
- 7.06 Reasons/causes for unsuccessful blood draw
- 7.07 How to maintain sample integrity by preventing cross contamination of additives during the phlebotomy procedure
- 7.08 How to maintain sample integrity by preventing hemolysis and hemoconcentration and interference in clinical analysis of blood results (eg. alcohol, edema, IV fluids, vigorously shaking samples during inversion)
- 7.09 Precautions for patients with special needs (eg. burns, scars, bleeding disorders, dementia, mastectomy, Parkinson’s)
- 7.10 Recognize and respond to complications during specimen collection (eg. excessive bleeding, fainting, hematoma)
- 7.11 Processing specimens for analysis (eg. centrifugation)
- 7.12 Packaging of blood and non-blood specimens for transport
- 7.13 Delivery of specimens to laboratories while appropriately maintaining the integrity of the sample (eg. timing, light sensitivity, temperature)
- 7.14 Storage of specimens according to appropriate procedures and protocols for transport to laboratories
- 7.15 Documentation (eg. collection time, fasting)
- 7.16 Ensure the recommended amount of specimen is collected for analysis (eg. tube filled to capacity)
- 7.17 Processing non-blood specimens from collection site for transport to laboratories (eg. urine)
- 7.18 Take the necessary corrective action for problems with specimens when processing for transport
- 7.19 Properly assess and prepare the site for blood collection
- 7.20 Locate and stabilize the vein for venipuncture
- 7.21 How to correctly position the patient for the blood collection procedure
- 7.22 Tourniquet application and release
- 7.23 Collect specimens at specific time intervals for analysis (eg. GTT, therapeutic drug levels)
- 7.24 Perform appropriate post puncture care for the patient
- 7.25 Pre-centrifugation and centrifugation processes



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## **8. Medical Terminologies and Abbreviations**

- 8.01 Define RBC, WBC, INR/PT EDTA, ESR, PRBC, PSA, STAT, PTT, GTT, OGTT, LDL/HDL, FBS, Diff, ABGs, ABO
- 8.02 Hemolysis
- 8.03 Hematoma
- 8.04 Hemoconcentration



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## Attempts

Eligible candidates are expected to attempt the Exam during the session closest to their selected date, if for some reason they do not sit that Exam session, it may be considered a failed attempt.

If unsuccessful on their first attempt, they must complete their second attempt within twelve (12) months of their initial eligibility.

Please note, applicants are not allowed to exceed three (3) Exam attempts. If a candidate is unsuccessful in their third Exam attempt, they will no longer be eligible to pursue the Certification Exam.

## Requirements

Applicants are required to complete the application form online, via email or mail.

Candidates are responsible for ensuring that their Exam application is received by Canadian Phlebotomy Technicians Group Inc. officials in a timely manner.

Eligible applicants are responsible for scheduling their Exam at various locations across Canada. Space may be limited and preferred Exam sites and times cannot be guaranteed; registering early will ensure applicants secure a seat.

Canadian Phlebotomy Technicians Group Inc. is not responsible for lost mail. It is recommended that paper applications be sent via a courier service to ensure applications are successfully received and processed.

## Payments

Applicants must submit their full Exam fees in Canadian funds with their Exam application.

***When applying online, applicants are encouraged to leave payment section blank and the office will contact each candidate for payment.*** Exam fees can be paid by Canadian cheque, Visa, or MasterCard. Please allow 2-3 business days for applications to be processed.

## Exam sitting

Eligible applicants must present a valid government issued photo identification on scheduled Exam Day e.g. driver's license, passport.

Candidates will NOT be admitted to the exam without presenting a valid ID.

Candidates are asked to arrive at least 15-30 minutes before the scheduled exam to allow adequate time for check-in procedures.

**\*Proof of Covid Vaccination will be required to sit the exam.**



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### **Rescheduling time and Location**

Applicants who wish to reschedule the time or location of their Exam appointment may do so at least two weeks prior to their scheduled exam, processing fees may be applicable.

### **Late Arrival or Missed Exam**

Please note, extra time will NOT be given to applicants who arrive late to finish the Exam.

No-show applicants must re-apply for a future Exam attempt. Applicants cannot reschedule a missed appointment for another Exam date.

### **Unforeseen Situations**

If an Exam is disrupted through circumstances beyond the control of the Canadian Phlebotomy Technicians Group Inc., such as extreme weather, the Canadian Phlebotomy Technicians Group Inc., will contact applicants regarding rescheduling the Exam.

### **Illness etc. prior to or on Exam Day**

There are many incidents in life that interrupts good intentions. On the Exam day, if applicants cannot reach the Testing Location due to circumstances beyond their control or they are ill, they must contact the Canadian Phlebotomy Technicians Group Inc. office immediately. Exam candidates who are ill or have extraordinary circumstances prior to the Exam must contact the office when feasible. The Canadian Phlebotomy Technicians Group Inc. will require official supporting documentation within 2 weeks after notification.

Exam fee refunds and Exam attempt reinstatements will be considered if possible.

### **Cancellation Policy**

Registered applicants who wishes to cancel their registration must cancel at least 2 weeks before the Exam date. Request should be in writing for partial refund of the Exam fee to be rendered.

Cancelling an Exam attempt may be considered a failed Exam attempt.

### **Special Accommodation (Disability, Religious)**

Canadian Phlebotomy Technicians Group Inc. is committed to having the Exam administered by means which respects the dignity and independence of persons with disabilities and/or religious observations.

Canadian Phlebotomy Technicians Group Inc. reserves the right to approve or deny requests for special accommodation and requests must be received before the desired Exam date.



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## **Accommodation Requirements**

Request for special accommodation must be received in writing prior to registering for the Exam in order for the request to be considered.

Valid documents must be current and include a formal diagnosis of the specific disability prepared by an authorized physician/psychologist. Official supporting documentation must be submitted to verify the applicant's disability and any accommodation history that may have been approved.

Requests received after an Exam registration may not be considered.

## **Exam Conduct**

Applicants' behavior prior to, during and after the Exam cannot disturb other candidates by any means necessary.

Disruptive behavior will not be tolerated and will result in removal from the Exam with NO refund issued.

## **Plagiarism**

Plagiarism will not be tolerated and will result in the removal from the Exam site, that Exam attempt will now be considered lost, and the candidate will NOT receive a refund or credit.

Eligible applicants are assumed to be pursuing the Exam with good intentions and in an honest attempt to achieve a pass mark. Any actions violating this assumption will be considered "plagiarism" or "misconduct".

## **Discrimination Policy**

The Canadian Phlebotomy Technicians Group Inc. strive for excellence and aim to foster an inclusive, diverse, cooperative environment for health professionals.

We are committed to providing an Exam process that is free from any type of discrimination\*, which supports the productivity and dignity of Exam candidates.

\* Discrimination is an action or a decision that treats a person or a group badly for reasons such as their race, age or disability.

Grounds for Discrimination includes;

Race, national or ethnic origin, color, religion, age, sex, sexual orientation, gender identity or expression, marital status, family status, disability, genetic characteristics, conviction of which a pardon has been granted or a record suspended.



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### **Exam Results**

Candidates will receive their Exam results within four to six weeks of the Exam date. Results will be sent to the mailing address provided on the candidate's application form, unless otherwise suggested.

If results are not received within four to six weeks of the Exam, candidates MUST contact the Canadian Phlebotomy Technicians Group Inc. to inquire. Exam results WILL NOT be given or discussed over the phone.

Exam results are reported as a "pass" or "fail". Candidates who have passed the Exam will only receive the Exam pass mark. Unsuccessful candidates will receive both their Exam score and the Exam pass mark.

### **Certificate of Competence**

Candidates who successfully complete both the theory and practical components of the Exam, will earn the professional title, Certified Phlebotomy Technician (CPT). Canadian Phlebotomy Technicians Group Inc. certification provides assurance to employers of competent healthcare providers who meet Canadian standards for phlebotomy. The CPT certification also provides individuals with increased employment opportunities which enables them to progress professionally. Holding the CPT, CPTG certification designation is considered a privilege of the Canadian Phlebotomy Technicians Group Inc. membership. To maintain certification, membership must be renewed, and proof of continuing education must be submitted.