



Canadian Phlebotomy Technicians Group Inc.

2800 Skymark Ave Mississauga, ON L4W 5A7

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

website: www.mycptg.ca e-mail: info@mycptg.ca

Certified Advanced Phlebotomy & Vascular Access Specialist™ (CPVS)

CANDIDATE'S COMPETENCY HANDBOOK

Expected Advanced-Level Competencies

September 2026

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Mission

The Canadian Phlebotomy Technicians Group Inc. was federally incorporated in 2019 to promote excellence in patient care, advance clinical competency, and support healthcare professionals in Phlebotomy practice.

Following extensive development, consultation, and review by Subject Matter Experts (SMEs) and industry requirements, the Certified Advanced Phlebotomy & Vascular Access Specialist (CPVS) certification was established to provide a standardized, competency-based assessment for regulated healthcare professionals practicing in vascular access, intravenous (IV) therapy, and advanced phlebotomy.

The Canadian Phlebotomy Technicians Group Inc. firmly believes that both theoretical knowledge and practical competency must be assessed to ensure safe and effective clinical practice. As such, the CPVS certification process includes both a comprehensive written examination and a competency-based practical assessment aligned with Canadian clinical standards and psychometric principles.

The CPVS certification is designed to validate advanced knowledge, clinical judgment, and technical competency in vascular access and phlebotomy practice. Our goal is to provide assurance to employers, healthcare organizations, and the public that certified professionals have demonstrated competency consistent with Canadian standards for safe patient care.

In addition to certification, the Canadian Phlebotomy Technicians Group Inc. supports ongoing professional growth through Continuing Professional Development (CPD) opportunities to help members maintain competency and remain current with evolving clinical practices and healthcare standards.

We strive for excellence and are committed to fostering an inclusive, diverse, collaborative, and professional environment for healthcare practitioners across Canada.

The Canadian Phlebotomy Technicians Group Inc. is proud to administer the Certified Advanced Phlebotomy & Vascular Access Specialist (CPVS) certification exam.



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The Profession

Certified Advanced Phlebotomy & Vascular Access Specialists (CPVS) are healthcare professionals who play an essential role in patient care through the safe performance of vascular access, intravenous (IV) therapy, and advanced phlebotomy procedures.

Professionals practicing in this area are responsible for establishing and maintaining vascular access for diagnostic, therapeutic, and infusion-related purposes while ensuring patient safety, specimen integrity, infection prevention, and adherence to clinical standards.

The role may include, but is not limited to:

- Peripheral IV catheter insertion and removal
- Connecting, monitoring, and discontinuing IV infusions
- Initiating gravity infusions and calculating drip rates
- Venipuncture and capillary specimen collection
- Blood collection from peripheral IVs, PICC lines, and vascular access devices
- Specimen handling, processing, and transport
- Patient identification, consent, and education
- Monitoring and responding to vascular access and infusion-related complications.

Healthcare professionals certified in vascular access and advanced phlebotomy contribute to a wide range of healthcare settings, including:

- Hospitals
- Diagnostic laboratories
- Long-term care facilities
- Community clinics
- Outpatient infusion clinics
- Emergency and urgent care settings

The CPVS certification is intended for regulated healthcare professionals whose scope of practice includes vascular access and IV therapy. This certification recognizes advanced competency and supports safe, evidence-informed clinical practice aligned with Canadian healthcare standards.

As healthcare practices continue to evolve, vascular access and infusion therapy professionals must maintain ongoing competency, critical thinking, and clinical judgment to support quality patient outcomes and professional accountability.



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Professional Ethics

Healthcare professionals certified under the Certified Advanced Phlebotomy & Vascular Access Specialist (CPVS) designation are expected to uphold the highest standards of professional and ethical conduct in all areas of practice.

Professionals practicing in vascular access, IV therapy, and advanced phlebotomy are entrusted with responsibilities that directly impact patient safety, dignity, and quality of care. Candidates and certified professionals are therefore expected to demonstrate professionalism, accountability, integrity, and compassion at all times.

Professionalism

Professionalism is demonstrated through respectful communication, appropriate conduct, accountability, and commitment to safe clinical practice. Certified professionals are expected to maintain competency, follow evidence-based standards, and practice within their professional scope.

Integrity

Integrity involves acting honestly, ethically, and responsibly in all professional interactions. CPVS professionals must demonstrate sound judgment, maintain accurate documentation, and uphold clinical and organizational standards regardless of circumstance.

Compassion and Patient-Centered Care

Certified professionals must provide care with empathy, dignity, and respect while recognizing the emotional, physical, and cultural needs of patients. Compassionate care includes effective communication, reassurance, and maintaining patient comfort throughout clinical procedures.

Patient Rights

Patients have the right to safe, respectful, and confidential care. CPVS professionals must respect informed consent, privacy, cultural diversity, and individual patient preferences in accordance with professional and legal standards.



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Confidentiality

All patient information obtained during clinical practice must remain strictly confidential. Certified professionals are expected to comply with applicable privacy legislation, employer policies, and professional standards related to the protection of personal health information.

Accountability

Certified professionals are accountable for maintaining clinical competency, practicing within their authorized scope, and recognizing situations that require additional assistance, escalation, or consultation.

Commitment to Safe Practice

CPVS professionals must adhere to infection prevention and control standards, sharps safety procedures, and evidence-based practices to ensure the safety of patients, colleagues, and the public.

The Canadian Phlebotomy Technicians Group Inc. is committed to promoting ethical practice, professional accountability, and excellence in patient care through the CPVS certification program.



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Scope of Practice

The Certified Advanced Phlebotomy & Vascular Access Specialist (CPVS) certification recognizes advanced competency in vascular access, intravenous (IV) therapy, and phlebotomy practice for regulated healthcare professionals whose authorized scope of practice includes these activities.

The CPVS designation validates enhanced knowledge, technical skill, clinical judgment, and safe patient care practices related to vascular access and specimen collection procedures in accordance with Canadian clinical standards.

The scope of practice for CPVS certified professionals may include, but is not limited to:

Vascular Access & IV Therapy

- Performing peripheral IV catheter insertions and removals
- Assessing and selecting appropriate vascular access sites
- Connecting, monitoring, and discontinuing IV infusions
- Initiating gravity infusions and calculating drip rates
- Flushing and maintaining peripheral vascular access devices
- Recognizing and responding to IV therapy complications
- Applying infection prevention and control measures during vascular access procedures
- Providing patient education related to IV therapy and vascular access care

Phlebotomy & Specimen Collection

- Performing venipuncture using evacuated tube systems, butterfly devices, or syringe methods
- Performing capillary blood collection procedures
- Collecting blood specimens from peripheral IV lines and approved vascular access devices in accordance with organizational policies
- Maintaining specimen integrity during collection, handling, processing, and transport
- Applying Clinical and Laboratory Standards Institute (CLSI) recommended procedures and order of draw standards

Patient Safety & Clinical Responsibilities

- Performing positive patient identification procedures
- Obtaining informed consent in accordance with organizational policies
- Monitoring patients before, during, and after procedures
- Recognizing and responding to adverse patient reactions or complications



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- Performing accurate documentation and reporting
- Adhering to sharps safety, biohazard handling, and infection prevention protocols

The CPVS certification is intended for regulated healthcare professionals such as:

- Registered Nurses (RNs)
- Registered Practical Nurses (RPNs)
- Paramedics
- Physician Assistants (PAs)
- Naturopathic Doctors
- Pharmacists
- Other regulated healthcare professionals whose scope includes vascular access and IV therapy.

The CPVS certification is not an entry-to-practice credential and does not independently authorize individuals to perform restricted activities outside their legislated professional scope. Certified professionals are responsible for practicing within applicable provincial regulations, employer policies, and organizational competencies.

The Canadian Phlebotomy Technicians Group Inc. supports ongoing professional development and competency maintenance to promote safe, effective, and evidence-informed patient care.



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Certificate Vs. Certification

Certificate Program	Professional Certification
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, CPVS



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Cognitive Level Framework

The CPVS examination is developed using a three-level cognitive framework adapted from Bloom's taxonomy to ensure appropriate assessment of knowledge, application, and clinical judgment.

Level	Description
Recall (R)	Knowledge of facts, definitions, terminology
Application (A)	Application of knowledge to clinical situations
Analysis (AN)	Clinical judgment, problem-solving, and decision-making

*The credential does not expand scope of practice but affirms advanced competency within the professional's regulated scope.



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Multiple Choice Questions (MCQ)	120
Exam Delivery, Theory	Online
Time Allotted	3 Hours
Practical Exam	In-Person

Exam Content Domains	Number of Items by Content Domain	Weight by Content Domains
Anatomy & Physiology	10–15	10–15%
Vascular Access Devices	10–15	10–15%
IV Therapy Initiation & Maintenance	10–15	10–15%
IV Medications & Parenteral Therapies	10–15	10–15%
Complications & Infection Prevention	10–15	10–15%
Blood Collection from Lines	8–12	8–12%
Advanced Phlebotomy Procedures	8–12	8–12%
Pediatric & Geriatric Collection	8–12	8–12%
Specimen Handling & Processing	8–12	8–12%
Patient Identification & Safety	6–10	6–10%
Total	120	120%

Passing Requirement:

- Candidates must achieve a minimum score of 75%

The CPVS theory exam is based on 120 items. The cut score or pass mark was determined by the Angoff Score Method. The Angoff score represents the standard that must be met to pass the exam based on 120 items. The standard is based on the difficulty of the items and on the panelist ratings.



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Practical Exam (In-Person – OSCE)

The practical exam is conducted using an Objective Structured Clinical Examination (OSCE) format to assess hands-on competency.

- **Objective:**
Standardized tasks and scoring to ensure fair and consistent evaluation of clinical competence
- **Structured:**
Candidates are provided with specimen collection and IV therapy requisitions and complete tasks based on simulated healthcare settings (e.g., hospital, diagnostic lab, long-term care, clinic)
- **Clinical:**
Candidates are assessed on real-world skills, including:
 - Blood collection using vacutainer, butterfly, and syringe methods.
 - IV catheter insertions, patency check, dressings and removals
 - Connecting, monitoring, and discontinuing IV infusions
 - Initiating gravity infusions and accurately calculating drip rates
 - Patient interaction, safety, and clinical judgment
- **Evaluation:**
Developed by SMEs and assessed by licensed healthcare professionals using standardized scoring tools

Passing Requirement:

- Candidates must achieve a minimum score of 85%



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Sub Domains Content

1. Anatomy & Physiology

- 1.01 Identify commonly used peripheral veins (median cubital, cephalic, basilic, dorsal hand veins)
- 1.02 Differentiate veins and arteries (structure, pressure, oxygenation, palpation characteristics)
- 1.03 Describe venous return and hemodynamics relevant to infusion therapy
- 1.04 Identify anatomical landmarks for peripheral and central venous access
- 1.05 Describe central venous anatomy (subclavian, internal jugular, femoral pathways)
- 1.06 Explain blood composition (plasma, RBCs, WBCs, platelets) and relevance to therapy
- 1.07 Identify age-related vascular changes in pediatrics and geriatrics
- 1.08 Recognize anatomical variations affecting vascular access

2. Vascular Access Devices

- 2.01 Identify types of peripheral IV catheters and indications.
- 2.02 Differentiate PICC, non-tunneled CVC, tunneled CVC, and implanted ports
- 2.03 Select catheter gauge and length based on therapy type and duration
- 2.04 Describe implanted port access and de-access using non-coring (Huber) needle
- 2.05 Explain flushing, locking, and maintenance protocols for central lines
- 2.06 Identify contraindications to vascular access site selection
- 2.07 Apply vein preservation principles for long-term therapy
- 2.08 Recognize device-related complications (occlusion, migration, fracture)

3. IV Therapy Initiation & Maintenance

- 3.01 Perform aseptic non-touch technique during insertion.
- 3.02 Select appropriate antiseptic agents (chlorhexidine, alcohol)
- 3.03 Apply securement and stabilization devices
- 3.04 Assess catheter patency and perform flushing protocols
- 3.05 Conduct dressing changes per evidence-based standards
- 3.06 Document insertion and maintenance accurately
- 3.07 Safely discontinue peripheral and central lines
- 3.08 Educate patients regarding IV care and monitoring



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4. IV Medications & Parenteral Therapies

- 4.01 Safely administer IV direct (IV push) medications.
- 4.02 Calculate infusion rates (mL/hr, gtt/min)
- 4.03 Assess medication compatibility and dilution requirements
- 4.04 Perform blood product verification and transfusion setup
- 4.05 Monitor for transfusion reactions and initiate emergency response
- 4.06 Describe TPN administration via peripheral and central access
- 4.07 Monitor metabolic and infectious complications of TPN
- 4.08 Outline chemotherapy safe handling principles and PPE requirements
- 4.09 Recognize vesicant risks and extravasation management principles

5. Complications & Infection Prevention

- 5.01 Recognize infiltration and extravasation signs.
- 5.02 Identify and grade phlebitis
- 5.03 Implement CLABSI prevention strategies
- 5.04 Recognize air embolism and thrombosis symptoms
- 5.05 Perform incident reporting and escalation procedures
- 5.06 Identify mechanical complications (catheter dislodgement, occlusion)
- 5.07 Apply infection control precautions and hand hygiene standards

6. Blood Collection from Lines

- 6.01 Determine indications and contraindications for line draws.
- 6.02 Perform blood draws from peripheral IV lines
- 6.03 Perform blood draws from PICC and central lines
- 6.04 Apply discard volume protocols
- 6.05 Maintain specimen integrity during line collection
- 6.06 Prevent contamination and infection during sampling

7. Advanced Phlebotomy Procedures

- 7.01 Perform venipuncture using evacuated tube system and syringe.
- 7.02 Perform capillary collection (finger stick, heel stick)
- 7.03 Order of draw and equipment selection
- 7.04 Manage difficult access patients (obesity, edema, dehydration)
- 7.05 Prevent hemolysis and hemoconcentration
- 7.06 Identify causes of unsuccessful draws and corrective actions.



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- 7.07 Recognize the difference between veins and arteries when identifying the collection site.
- 7.08 How to maintain sample integrity by preventing cross contamination of additives during the phlebotomy procedure.

8. Pediatric & Geriatric Collection

- 8.01 Select appropriate pediatric collection sites.
- 8.02 Adhere to pediatric maximum blood volume guidelines
- 8.03 Recognize geriatric vein fragility and skin integrity issues
- 8.04 Apply positioning and fall prevention measures
- 8.05 Communicate effectively with pediatric and geriatric populations
- 8.06 Consider comorbidities and anticoagulant therapy

9. Specimen Handling & Processing

- 9.01 Select appropriate tubes and additives.
- 9.02 Perform correct inversion and mixing
- 9.03 Apply centrifugation timing and preparation standards
- 9.04 Label specimens accurately and completely
- 9.05 Maintain proper transport temperature requirements
- 9.06 Identify pre-analytical and post analytical errors and corrective actions.
- 9.07 Aliquoting of specimens

10. Patient Identification & Safety

- 10.01 Apply positive patient identification procedures.
- 10.02 Obtain informed consent appropriately
- 10.03 Utilize appropriate PPE
- 10.04 Perform sharps safety and biohazard disposal
- 10.05 Monitor patient for adverse reactions post-procedure
- 10.06 Document care in accordance with regulatory standards



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Exam Policies and Requirement

The following policies and requirements have been established to ensure the integrity, fairness, security, and professional standard of the Certified Advanced Phlebotomy & Vascular Access Specialist (CPVS) certification process.

All candidates are responsible for reviewing and complying with the policies outlined below prior to registering for the examination.

Eligibility Requirements

Candidates applying for the CPVS certification exam must meet all established eligibility criteria, including:

- Current membership with the Canadian Phlebotomy Technicians Group Inc. (CPTG)
- Completion of an approved educational pathway and/or approved clinical experience requirements
- Practice within a regulated healthcare profession whose scope includes vascular access and IV therapy
- Successful completion of all required documentation and verification processes

Eligibility approval must be confirmed prior to examination scheduling.

Exam Components

The CPVS certification process consists of:

1. Theory Examination (Online)

- 120 Multiple Choice Questions (MCQs)
- 3-hour time allotment
- Delivered in English only

2. Practical Examination (In-Person OSCE)

- Competency-based assessment
- Standardized evaluation process
- Assessed by licensed healthcare professionals

Candidates must successfully pass both examination components to earn certification.



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Exam Attempts

- Candidates are permitted a maximum of **three (3) examination attempts**
- Candidates who are unsuccessful after the third attempt will no longer be eligible to challenge the examination unless otherwise approved by the Board or Certification Committee
- Examination attempts may be subject to waiting periods and remediation requirements

Registration Requirements

Candidates are responsible for:

- Submitting a complete application package
- Providing all required supporting documentation
- Ensuring payment of all applicable examination fees
- Scheduling examination appointments within approved timelines

Incomplete applications may delay eligibility approval.

Identification Requirements

Candidates must present valid government-issued photo identification on the day of the examination.

Examples include:

- Driver's license
- Passport
- Provincial photo identification card

Failure to present valid identification may result in denial of entry to the examination.

Exam Conduct

Candidates are expected to conduct themselves professionally before, during, and after the examination process.

The following behaviors are strictly prohibited:

- Cheating or plagiarism
- Sharing exam content



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- Use of unauthorized materials or electronic devices
- Use of translation software or platforms during the online examination
- Disruptive or inappropriate behavior
- Recording or reproducing exam materials

Violation of examination policies may result in:

- Immediate removal from the examination
- Invalidated examination results
- Loss of examination fees
- Suspension or permanent ineligibility from the certification process

Language Requirement

The CPVS examination is administered in English only. Candidates are expected to complete the examination independently without the use of translation tools, interpreters, or unauthorized assistance unless formally approved as an accommodation.

Special Accommodations

The Canadian Phlebotomy Technicians Group Inc. is committed to providing reasonable accommodations in accordance with applicable accessibility and human rights legislation.

Candidates requesting accommodations for:

- Disability
- Medical conditions
- Religious considerations

must submit written requests and supporting documentation prior to examination scheduling.

Accommodation requests are reviewed individually, and approval is not guaranteed.

Rescheduling & Cancellation

Candidates requesting to:

- Reschedule examination dates
- Change examination locations
- Cancel examination appointments
- Exam Withdrawal



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must provide written notice within established timelines. * **Administrative fees may apply.**

Failure to attend a scheduled examination may be considered a failed attempt.

Examination Results

Examination results will be released following completion of all required scoring and validation processes. Results are typically communicated electronically within 4-6 weeks of the scheduled exam dates.

Official results are reported as:

- Pass
- Fail

Examination results will not be released by telephone.

Certification Award

Candidates who successfully complete both the written and practical components of the CPVS examination will be awarded the professional designation:

Certified Advanced Phlebotomy & Vascular Access Specialist (CPVS)

Successful certification confirms that the candidate has demonstrated competency aligned with Canadian standards for vascular access, IV therapy, and advanced phlebotomy practice. A digital encrypted credential will be sent via email to successful candidates.

Certification Maintenance

To maintain certification status, certified professionals may be required to:

- Maintain active membership
- Participate in Continuing Professional Development (CPD)
- Comply with certification renewal requirements established by CPTG

*Failure to maintain certification requirements may result in suspension or expiration of the credential.



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Professional Responsibility

The CPVS certification does not independently authorize the performance of restricted activities outside a professional's legislated scope of practice.

Certified professionals remain responsible for:

- Practicing within provincial regulations
- Following employer policies
- Maintaining individual professional accountability

The Canadian Phlebotomy Technicians Group Inc. reserves the right to update examination policies, certification requirements, and procedures as necessary to maintain professional and psychometric standards.