No. 984 **19 October 2007**

SOUTH AFRICAN QUALIFICATIONS AUTHORITY (SAQA)

In accordance with Regulation 24(c) of the National Standards Bodies Regulations of 28 March 1998, the Standards Generating Body (SGB) for

Phlebotomy Technicians

registered by Organising Field 09 – Health Sciences and Social Services, publishes the following Qualification and Unit Standards for public comment.

This notice contains the titles, fields, sub-fields, NQF levels, credits, and purpose of the Qualification and Unit Standards. The full Qualification and Unit Standards can be accessed via the SAQA web-site at **www.saqa.org.za**. Copies may also be obtained from the Directorate of Standards Setting and Development at the SAQA offices, SAQA House, 1067 Arcadia Street, Hatfield, Pretoria.

Comment on the Qualification and Unit Standards should reach SAQA at the address below and ***no later than 19 November 2007.*** All correspondence should be marked **Standards Setting – Phlebotomy Technicians** and addressed to

The Director: Standards Setting and Development
SAQA
Attention: Mr. D. Mphuthing
Postnet Suite 248
Private Bag X06
Waterkloof
0145
or faxed to 012 – 431-5144
e-mail: dmphuthing@saqa.org.za

PP
DR. S. BHIKHA
DIRECTOR: STANDARDS SETTING AND DEVELOPMENT

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

QUALIFICATION:
Further Education and Training Certificate: Phlebotomy Techniques

SAQA QUAL ID	*QUALIFICATION TITLE*		
59345	Further Education and Training Certificate: Phlebotomy Techniques		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
QUALIFICATION TYPE	*FIELD*	*SUBFIELD*	
Further Ed and Training Cert	9 - Health Sciences and Social Services	Curative Health	
ABET BAND	*MINIMUM CREDITS*	*NQF LEVEL*	*QUAL CLASS*
Undefined	120	Level 4	Regular-Unit Stds Based

PURPOSE AND RATIONALE OF THE QUALIFICATION
Purpose:

The purpose of this Qualification is to develop learner competence in performing Phlebotomy Techniques within a blood donor clinic and a medical pathology environment. The qualification is for any individual who is or wishes to be involved in the medical environment.

Learners working towards this Qualification will find that the acquisition of competence in the Unit standards, which make up the Qualification, will increase the opportunity for employment, add value to their job and fulfill the need for phlebotomy services. This entry-level Qualification is intended to enhance the provision of phlebotomy services within the medical environment. Learners obtaining this Qualification will be able to advance the interests of their employers through their interaction with the public who come into contact with the organisation/institution.

This qualification will provide the broad knowledge; skills and values needed in the medical environment and will facilitate access to-and mobility and progression within-education and training.

It will also serve as a platform to progress along a learning path for learners who:

- Were previously disadvantaged or who were unable to complete their schooling and were therefore denied access to Further Education and Training.
- Have worked in the medical environment for many years, but have no formal Qualification that will allow them to perform the work of phlebotomists.
- Wish to extend their range of skills and knowledge of the industry so that they can become competent workers in the medical environment.

The Unit standards included in the Qualification are intended as building blocks for the further development of skills that will make the learner a more informed and efficient phlebotomist.

The focus of this qualification is to enable learners to be competent in a range of knowledge, skills, attitudes and values including:

- Collection of venous and capillary blood and non-blood specimens for medical purposes.
- Providing HIV pre-test information.
- Ensuring good customer care.
- Performing all phlebotomy procedures and processes safely and within a legal and ethical framework.

The intention of this Qualification is to:

- Promote the development of knowledge, skills and values that are required in the work of a phlebotomist.
- Release the potential of people, in order for them to grow and develop.
- Provide opportunities for people to advance their knowledge and skills so enabling them to move up the career path in phlebotomy.

It is also important to note that a learner, on completion of the qualification, must register with the relevant statutory health council in order to work as a phlebotomist.

Note: All procedures and processes in phlebotomy are undertaken according to workplace protocols and, where applicable, according to relevant legislation.

Rationale:

The FET Certificate: Phlebotomy Techniques has been designed to meet the phlebotomy needs of the pathology and blood transfusion sectors of the medical health field as well as the needs of those learners who have an interest in and desire to make phlebotomy their chosen career path. There is a steadily increasing shortage of phlebotomists in the country. In meeting this need, more learners will have access to employment, thereby contributing to the strengthening of the country's economy.

Phlebotomy services are essential by their very nature and there is a constant demand to assist patients/donors/clients. Phlebotomy services required by the pathology and blood transfusion sectors revolve around obtaining blood and non-blood specimens for analysis in order to aid in the prevention, diagnosis, treatment and monitoring of disease. The prevalence of HIV and AIDS and other related diseases has resulted in an increased need for phlebotomy services. This Qualification has made it possible for standardised phlebotomy training to become available, thus increasing the mobility of learners within the medical environment.

This qualification will address these concerns whilst providing the qualifying learner with the flexibility to pursue a career in the medical health field. The learner having completed this Qualification will have the opportunity to pursue related Qualifications at higher levels of the NQF. Hence, competencies in this entry-level Qualification constitute the basis for further learning. The qualification also fulfills the objectives of the NQF by providing learners with opportunities for mobility and progression in this and other related fields. This Qualification has made possible the introduction of phlebotomy services to areas where it has not previously been available.

RECOGNIZE PREVIOUS LEARNING?
Y

LEARNING ASSUMED IN PLACE
Learners wishing to study towards this qualification are assumed to have:

- Mathematical literacy at NQF Level 3.
- Communication at to NQF Level 3.

Recognition of Prior Learning:

The structure of this Unit standard-based Qualification makes the Recognition of Prior Learning (RPL) possible, if the learner is able to demonstrate competence in the knowledge, skills, values and attitudes implicit in this Qualification.

Learners who already work in the medical environment and who believe that they possess the competencies to enable them to meet all of the outcomes listed in the unit standards will be able to present themselves for assessment against the unit standards of their choice. Once found competent, these learners will be certified as competent and credited accordingly. Recognition of Prior Learning can also be conducted for these learners at qualification level, by means of Integrated Assessment.

RPL will allow for accelerated access to further learning and gaining of credits towards the qualification. All RPL ought to be carried out by the provider in agreement with the relevant ETQA or another ETQA that has a Memorandum of Understanding (MoU) in place with the relevant ETQA.

QUALIFICATION RULES
Qualification Rules:

In order to be found competent in this qualification, the learner must achieve the following credits from the given areas of learning:

- Fundamental component: 56 credits.
- Core component: 54 credits.
- Elective component: Minimum of 10 credits from the 31 credits allocated.

EXIT LEVEL OUTCOMES
1. Collect blood and non-blood specimens for medical purposes.
- Range: Medical purposes refer to pathological conditions and blood transfusion.

2. Apply the principles of customer care in the medical pathology and blood transfusion fields.

3. Use knowledge of HIV and AIDS to provide pre-test information and support.

4. Interact professionally and ethically within a human rights framework.

Critical Cross-field Outcomes:

The Critical Cross-field Outcomes are addressed throughout the qualification and accompanying unit standards.

Identify and solve problems in which responses display that responsible decisions using critical and creative thinking have been made when:

- Dealing with adverse reactions.
- Determining the site from which blood is to be collected.
- Reacting to a situation in which safety has been compromised.

Work effectively with others as a member of a team, group, organisation, community to:

- Ensure that pre-test requirements are adhered to.
- Monitor patient/donor throughout the collection process.
- Establish rapport with patient to build trust.
- Maintain ethical standards during interactions, procedures and processes.
- Ensure the safety of all.

Organise and manage oneself and one's activities responsively and effectively when:

- Collecting blood and non-blood specimens.

- Working in a blood donor clinic.
- Conducting HIV pre-test information interview.
- Performing routine maintenance and quality control.

Collect, analyse, organise and critically evaluate information to:

- Respond to adverse reactions.
- Identify and prepare patient/donor for specimen collection.
- Use blood transfusion regulations and donor acceptance criteria.
- Mediate information on HIV and AIDS to patient/donor.
- Collect a quality specimen.

Communicate effectively using visual, mathematical and/or language skills in the modes of oral and/or written presentation to:

- Obtain correct information and consent from patient/donor.
- Inform patient about the specimen collection procedure.
- Convey pre-test information and make patient aware of their rights.
- Build trust and ensure confidentiality and display sensitivity.
- Submit reports when accidental breach of safety has occurred.

Use science and technology effectively and critically, showing responsibility towards the environment and the health of others by:

- Using the correct equipment in a manner that will yield the best results.
- Disposing of bio-hazardous waste.
- Testing the equipment to obtain accurate readings.

Demonstrate an understanding of the world as a set of related systems by recognising that the problem-solving contexts do not exist in isolation when engaging with adverse reactions and interacting with patients' queries.

ASSOCIATED ASSESSMENT CRITERIA

Associated Assessment Criteria Exit Level Outcome 1:

1.1 Body systems are described in terms of anatomy and physiology.
o Range: 'Body systems' refer only to systems associated with the collection of blood and non-blood specimens.
1.2 Medical terminology associated with the relevant body systems is described for use in clinical laboratories.
1.3 Blood and non-blood specimens are handled in accordance with legal and organizational prescripts.
o Range: 'Handle' refers to collecting preparing storing and/or transporting to a processing facility.
1.4 Patients are informed about the required procedures for the self-collection of non-blood specimens.
1.5 Specimens are evaluated to assess suitability for analysis.
1.6 Infection control and safety policies and procedures are recognized as essential and are adhered to at all times.

Associated Assessment Criteria Exit Level Outcome 2:

2.1 Communication skills appropriate to the context are applied when interacting with customers.

2.2 Customers' needs, expectations, and areas of dissatisfaction are managed according to company policy in a manner that indicates knowledge of the impact of poor customer service on the organisation and on the customer.
o Range: 'Customers' refers to internal and external customers.
2.4 Medical terminology related to the phlebotomy and blood transfusion field is correctly used, whilst simultaneously ensuring that the customer understands the terminology.

Associated Assessment Criteria Exit Level Outcome 3:

3.1 Knowledge of HIV ands AIDS and the legal requirements pertaining to HIV testing is applied in all patient/donor interactions.
3.2 Communication skills appropriate to the context are demonstrated during interactions with patients/donors.
3.3 Patient/donor decision is accepted in a non-judgemental manner, documented and acted upon in terms of company policy.

Associated Assessment Criteria Exit Level Outcome 4:

4.1 The application of relevant legislation and the principles of medical ethics is evidenced during all patient/donor/client interactions.
4.2 The rights of patient and donors are acknowledged at all times and their knowledge of their responsibilities is ensured.

Integrated Assessment:

The term `Integrated Assessment` implies that the theoretical and practical components should be assessed together. During integrated assessments the assessor should use formative and summative assessment methods and assess combinations of practical, foundational and reflexive competencies (applied competence).

Assessment of communication and numeracy should be conducted in conjunction with other aspects and should use authentic phlebotomy contexts wherever possible.

A variety of methods must be used in assessment, and tools and activities must be appropriate to the context in which the learner is working. Where it is not possible to assess the learner in the workplace, simulations, case studies, role-plays and other similar techniques should be used to provide a context appropriate to the assessment.

Note that all assessment methods/instruments must be agreed upon/approved by the ETQA or ETTQA that has a Memorandum of Understanding in place with the relevant ETQA.

Formative Assessment:

This kind of assessment will typically take place during training and serves to guide the learner towards full competence. Assessment can be done in any agreed-upon method of assessment of the knowledge required to perform the various competencies.

The following methods can be used:

- Observations.
- Questioning-written and oral.
- Simulations.
- Role play.
- Case studies.
- Demonstrations.
- Assignments.

• Other acceptable methods.

Summative Assessment:

For the learner to be certified competent against the qualification, he/she must prove competence through the integration of the competencies expressed in the unit standards. The elements of importance are problem-solving capabilities and the creation of a safe environment.

The following methods can be used:

• Written tests.
• Practical tests.
• Oral assessment methods.
• In-situ (on-the-job) observations.
• Simulation.
• Structured classroom discussions and oral tests.

The learner's ability to demonstrate all the competencies in the unit standard, under real-life working conditions and in the presence of an assessor, will be adequately assessed.

Workplaces are used for assessment purposes provided that the appropriate facilities, equipment, and support systems are available and accessible to both the assessor and the learner.

The following are required for workplace assessment:

• Assessment needs to occur in a familiar environment so that the learner is not asked to cope with different equipment and a strange environment at the time of assessment. (This will not detract from the portability of the generic skill being assessed. Portability will be supported through a short depot or region specific orientation session).
• Assessment needs to take place at a time and venue mutually agreed to by the assessor and the learner.

INTERNATIONAL COMPARABILITY
As far as phlebotomy is concerned the United States has the best and most comprehensive programmes. In addition, much of the educational material pertaining to phlebotomy is used by providers in South Africa. There are several phlebotomy accreditation bodies in the US; a few will be discussed here. The first part of the discussion on phlebotomy in the US focuses on phlebotomy accreditation bodies and the second on examples of phlebotomy programmes offered by institutions.

United States of America:

The American Medical Technologists (AMT) is a non-profit certification agency and professional membership association representing over 38,000 individuals in allied health care. Established in 1939, AMT has been providing allied health professionals with professional certification services and membership programs to enhance their professional and personal growth. AMT's mission is to issue certification credentials to Phlebotomy Technicians among a host of other professions. The description of a phlebotomist by the AMT very closely resembles the phlebotomist envisaged in the FETC: Phlebotomy Techniques in terms of competencies, skills, attitudes and values. The AMT describes the Phlebotomy Technician (phlebotomist) as an integral member of the medical laboratory team whose primary function is the collection of blood samples from patients by venipuncture or microtechniques. The phlebotomy technician facilitates the collection and transportation of laboratory specimens, and is often the patient's only contact with the medical laboratory. The need to assure quality and patient safety mandates strict professional behaviour and standards of practice for these practitioners.

The primary function of a phlebotomy technician is to obtain patient blood specimens by venipuncture or microtechniques. The phlebotomy technician aids in the collection and transportation of other laboratory specimens, and may be involved with patient data entry.

A phlebotomy technician also draws blood for transfusions, donations and research.

Phlebotomy technicians must like challenge and responsibility. They must be accurate, work well under pressure and communicate effectively. They must be able to deal with patients and be able to calm patients.

Safety is key and all safety precautions must be taken to prevent the transmission of infectious diseases.

Some of the duties performed by a Phlebotomy Technician are:

- Drawing blood from patients or donors in hospitals, blood banks, clinics, doctor offices, laboratories or similar facility for medical purposes.
- Assembling equipment (such as needles, blood collection devices, gauze, tourniquet, cotton, and disinfectant).
- Obtaining informed consent for the specimen collection procedure.
- Verifying or records identity of patient or donor.
- Conversing with patients to allay fear of procedure.
- Applying tourniquet to arm, locating vein, swabbing area with disinfectant, and inserting needle into vein to draw blood into collection tube. (May also prick finger instead of inserting needle).
- Collecting and instructing the patient in the self collection of non-blood specimens.
- Labelling and storing blood container/s for processing.

The phlebotomist may conduct interviews, take vital signs and screen donors at a blood bank.

A sister organisation with similar phlebotomy accreditation requirements is American Certification Agency for Healthcare Professionals (ACAHP), a voluntary, non-governmental, national certification agency established to recognize those practitioners who have attained a standard of knowledge through structured programs or work experience.

The mission of ACAHP, inter alia, is to:

- Establish guidelines by which individuals may demonstrate competence in their discipline through certification testing.
- Provide a mechanism by which individuals who wish to enter, continue, and/or advance in their discipline by certification testing, adhere to the highest ethical standards.

The following is a brief description of a Phlebotomy Technician. The learner should have at least one year of phlebotomy experience including both venipuncture and dermal punctures, or successful completion of an accredited phlebotomy training program. The learner must have documented at least 100 successful venipunctures and 10 successful dermal punctures (Louisiana requires 25 dermal punctures). The FETC: Phlebotomy Techniques compare very favourably with the stipulations of the ACAHP in terms of competencies skills and values.

The same applies for the National Centre for Competency Testing (NCCT) in the United States, which is an independent certifying agency that administers national certification examinations with an emphasis on entry-level health care fields. Their general Phlebotomy Technician examination was among the first to be approved for California certification testing by the Laboratory Field Services Division of the California Department of Health Services.

The NCCT is an independent, third-party organization that has certified more than 150,000 individuals by examination throughout the U.S. since 1989 in several categories including that of the Phlebotomy Technician. Every candidate must meet the competencies in the FETC.

Phlebotomy Techniques address most of the concerns of the Coalition for Phlebotomy Personnel Standards which was established in 2003 and consists of representatives of clinical laboratory instrumentation manufacturing industry, specimen collection systems, laboratory membership organizations, phlebotomy certification agencies and government agencies. The NCCT and the AMT, among others, belong to this coalition.

The mission of the Coalition is to improve the quality of blood specimens collected for clinical testing and among its objectives are to:

- Reduce the technical problems that poor specimen quality imposes on test instrumentation and collection systems.
- Improve patient care by assuring that specimens collected accurately reflect the patient's physiological condition.
- Reduce specimen collection errors that permanently injure patients and lead to medical mistakes in patient diagnosis, treatment, medication and management.

Phlebotomy is an invasive procedure that requires significant skill and training to protect patients from injury and the consequences of results obtained from improperly collected specimens. The Coalition is dedicated to improving the quality of blood specimens collected through encouraging legislation that establishes minimum training requirements and certification/licensure for all phlebotomists.

The National Accreditation Agency for Clinical Laboratory Sciences (NAACLS) - now named the Clinical and Laboratory Standards Institute (CLSI) is committed to being the premier international agency for accreditation and approval of educational programs in the clinical laboratory sciences and related health professions through the involvement of expert volunteers and its dedication to public service.

The CLSI describes the functions of a phlebotomist below. As will be seen the FETC: Phlebotomy Techniques n meets almost all the criteria set out by the organisation. According to the CLSI, the phlebotomist should be proficient in:

- Collecting, transporting, handling and processing blood specimens for analysis.
- Recognizing the importance of specimen collection in the overall patient care system.
- Relating the anatomy and physiology of body systems and anatomic terminology to the major areas of the clinical laboratory, and to general pathologic conditions associated with body systems.
- Identifying and selecting equipment, supplies and additives used in blood collection.
- Recognizing factors that affect specimen collection procedures and test results, and taking appropriate actions within predetermined limits, when applicable.
- Recognizing and adhering to infection control and safety policies and procedures.
- Monitoring quality control within predetermined limits.
- Recognizing the various components of the health care delivery system.
- Recognizing the responsibilities of other laboratory and health care personnel and interacting with them with respect for their jobs and patient care.
- Demonstrating professional conduct, stress management, interpersonal and communication skills with patients, peers and other health care personnel and with the public.
- Demonstrating an understanding of requisitioning and the legal implications of their work environment.
- Applying basic principles in learning new techniques and procedures.
- Recognizing and acting upon individual needs for continuing education as a function of growth and maintenance of professional competence.

Community College of Rhode Island in the US provides the following training in phlebotomy. These are short courses compared to the FETC: Phlebotomy Techniques. This qualification is more comprehensive on the basis of competencies.

• Phlebotomy I:

This course presents the theory and practice of phlebotomy, which includes such topics as: phlebotomists in health care delivery systems; medical terminology; infection control and safety; anatomy and physiology of body systems; collection equipment, reagents and interfering factors in blood collection; venipuncture and capillary puncture blood collection procedures and requisitioning. Laboratory experiences include venipuncture practice by vacutainer, syringe and winged collection set on adult and paediatric training arms. Skin puncture collection procedures using a variety of lancets to collect unopettes and microtainers, are performed. Blood smear preparation, bleeding time and quality control are also practiced.

• Phlebotomy II:

This course includes collection and handling of non-blood specimens, quality assurance, specimen handling, specimen processing, communications techniques, legal issues, professionalism and arterial puncture. In the college laboratory, students perform specimen processing, blood smear preparation, blood culture collection, skin puncture and venipuncture collection. Students spend a total of 160 hours of clinical training in phlebotomy techniques at an affiliated site.

Flanagan Campus and Liston Campus offers a Phlebotomy Certificate. The Phlebotomy Certificate Program is a part-time, two semester program which is offered three times a year. The program includes lectures and laboratory experiences at the college as well as practical training at a clinical site. The course of instruction is designed to provide both the technical and interpersonal skills required for the competent and professional practice of phlebotomy. Graduates of the program are eligible to take a national certification examination in phlebotomy.

The rapid and expanded growth of scientific knowledge and technology has given rise to an increase in testing volume, the development of new testing systems, and commitment to quality assurance in the clinical laboratory. The phlebotomist plays a vital role by obtaining quality specimens, which enable the laboratory to deliver meaningful and accurate test results to assist the physician in diagnosis. Often, the phlebotomist is the only employee from the clinical laboratory visible to the patient, and therefore affects public relations.

The FETC: Phlebotomy Techniques is more extensive then the programmes offered by these institutions.

United Kingdom:

In the United Kingdom the National Association of Phlebotomists is a professional organisation supporting the development of phlebotomists. The National Association of Phlebotomists' definition of a Phlebotomist is a professional performing Venepuncture as a main role within a healthcare setting.

If an individual is interested in a career in Phlebotomy s/he contacts a local Hospital or Primary Care Trust and enquires about a Trainee Post. Courses offering Phlebotomy Training for non-medically trained students without a Phlebotomy job are not considered.

Training to become a Phlebotomist should take up to six months. This would include formal theoretical training and supervised practice, leading to the successful completion of the National Occupational Standards. Experience would be gained in all aspects of Phlebotomy inclusive of

Domiciliary Visits, Satellite Clinics, Acute Ward Patients, Out Patient Clinics leading to experience in other specialised areas.

The following skills are required:

Essential skills:

- Minimum of two GCSE's or equivalent.
- Excellent communication skills.
- Manual dexterity.
- Smart presentation.
- Willingness to undertake ongoing Training.
- Strong interpersonal skills.
- Ability to work in a pressured environment.
- Ability to work as part of a team.
- Ability to handle sensitive & confidential information.
- Ability to cope with nervous and distressed patients.
- Show sensitivity & empathy to the needs of others.
- Accept and follow instructions in a safe and efficient manner.

Desirable skills - (may change within Trusts):

- Driving License.
- Previous experience within Healthcare.
- Flexibility.

The FETC: Phlebotomy Techniques covers much more than the theoretical and practical competencies outlined by the National Association of Phlebotomists.

New Zealand:

A Career Services website in New Zealand lists the following specifications regarding a phlebotomist. It will be noted that this qualification covers almost all the aspects listed below.

Tasks & Duties:

Phlebotomists working in a medical laboratory may do some or all of the following:

- Greet patients.
- Read request forms from doctors about patients.
- Explain the procedure to patients and check their personal details.
- Use various techniques to take blood from patients' veins.
- Take capillary blood samples from fingers and heels.
- Take skin and nail scrapings.
- Label samples.
- Collect blood samples from patients in hospitals, rest homes or private residences.
- Take throat or wound swabs.
- Collect samples of body fluids.
- Test for allergies.

Phlebotomists working as donor nurses may do some or all of the following:

- Greet donors.
- Record donors' personal details, including their weight, age, blood type and contact details.
- Explain the procedure to donors and check their personal details.

- Take a finger-prick test to check the donor's haemoglobin (red blood cells) and ensure that iron levels in the blood are normal.
- Take blood from donors.
- Inform donors of emergency medical contacts for potential side-effects of donating blood.
- Care for donors that may be feeling dizzy or have an adverse reaction.
- Provide refreshments for donors, and ensure they absorb enough sugar back into their system.
- Maintain machinery and order supplies.
- Advertise blood collection days.
- Drive a blood bank collection vehicle.
- Give speeches about donating blood at schools.

Skills & Knowledge:

Phlebotomists need to have:

- Knowledge of the anatomy of the arm and blood-taking techniques.
- The ability to take a variety of other bodily samples.
- Knowledge of safety and hygiene.
- Organisational skills.
- Communication skills including listening skills.
- People skills.

Personal Qualities:

Phlebotomists need to be:

- Responsible.
- Tolerant, patient and gentle.
- Able to inspire confidence in patients and put them at ease.
- Practical.
- Able to pay attention to detail.
- Able to follow procedures and instructions.

Skills are gained on the job. Phlebotomists may attend conferences and courses to keep their knowledge up to date. Phlebotomists who have worked for two years full-time in a laboratory and passed all the levels in their competency log-book, may sit the Qualified Phlebotomist Technician (QPT) exam provided by the New Zealand Institute of Medical Laboratory Science.

Australia:

In Australia, the Health Business and Training Academy (HBTA), in conjunction with the Australian Health Professionals Training Solutions (AHPT Solutions), presents two qualifications in phlebotomy. AHPT Solutions is a training organisation based in Parramatta, Sydney. They are widely recognised in Australia as a provider of quality training in pathology specimen collection. HBTA's partnership with this organisation gives training and skills development and the chance for employment in the pathology specimen collection industry.

The first qualification is the Certificate IV in Pathology. This qualification is important where the collection of pathology specimens is a key component of on-job skills.

The many skills that are acquired are useful to obtaining employment in the industry, whether the individual is new to the workforce or planning a second or third career.

This qualification requires that applicants have completed the following units from Certificate III in Pathology:

Compulsory Units:

- Use basic medical terminology.
- Contribute to OHS processes.
- Comply with infection control policies and procedures in health work.
- Apply first aid.
- Communicate and work effectively in health.

Mandatory electives for collection:

- Operate efficiently within a pathology and specimen collection environment.
- Perform blood collection.
- Identify and respond to clinical risks associated with pathology specimen collection.

Unlike the now-superseded qualification, the full Certificate III is not required. However, any individual who has completed the pathology assistance strearn electives for their Certificate III in Pathology will need to complete at least the three electives identified above before they can enroll.

The second qualification is the Certificate III in Pathology. This qualification is important where the collection of pathology specimens is a key component of on-job skills. Not all occupations cover this important area and nurses in particular could do the short programmes to help them meet a critical industry need.

Core skills include:

- Blood specimen collection.
- Collection of specimens other than blood.
- Medical terminology.
- Communication skills.
- Safe working practices.
- OHS and infection control.
- Basic first aid (delivered by Red Cross, St John Ambulance or similar).

One can also choose five electives from this list:

- Recording electrocardiograms (ECG).
- Measuring spirometry/flow volume loop.
- Home visits.
- Working with indigenous clients.
- Customer service.
- Business technology.
- Work skills.
- Manage financial transactions.

Courses are delivered in around Australia by combinations of practical workshops and self-paced learning.

The FETC: Phlebotomy Techniques is a combination of the Certificate III and the Certificate IV and covers almost all the competencies offered by these qualifications.

Japan:

In Japan, in 2004, the Japanese Committee of Clinical Laboratory Standards (JCCLS) published a standard phlebotomy guideline, which not only ensures the safety of the patients and phlebotomists but is adapted to the health-care setting in Japan. This phlebotomy standard is also essential for the standardization of clinical laboratory tests. This guideline was completed on the basis of current phlebotomy procedures widely in use in Japan using phlebotomy standards in the USA as references, while reconsidering their scientific reasoning as far as possible. The JCCLS used the standards of the Clinical Laboratory Standards Institute (CLSI) of the United States of America.

The content of the guideline includes necessary facilities and equipment, a step by step safe but practical venipuncture procedure, an explanation of the individual steps, and other supplementary information such as alternative methods.

Africa et al:

There is no evidence or knowledge of any specific formal phlebotomy training in any other African country. This also applies to countries with developing economies on the other four continents.

Conclusion:

On the whole the FETC: Phlebotomy Techniques compares more than favourably with international qualifications. It is much more comprehensive and intensive than most programmes offered or accredited by organisations/institutions abroad.

ARTICULATION OPTIONS

On successful completion of this qualification learners may pursue the following qualifications:

Horizontal articulation is possible with the following qualifications, inter alia:

- ID 49131; Further Education and Training Certificate: Community Health Work, NQF Level 4.
- ID 50019; Further Education and Training Certificate: Nursing, NQF Level 4.
- Further Education and Training Certificate: Medical Laboratory Techniques. (This is currently under construction but it is already a recognised qualification registered with the HPCSA).

Vertical articulation is possible with the following qualifications:

- ID 58083; National Certificate: Emergency Care at NQF Level 5.
- National Higher Certificate: Biomedical Technology at NQF Level 5. (Recognised qualification registered with the HPCSA).

MODERATION OPTIONS

- Anyone moderating the assessment of a learner against this qualification, must be appointed by the relevant Education and Training Quality Assurance body (ETQA) or ETQA that has a Memorandum of Understanding in place with the relevant ETQA.

- Moderation of assessment will be overseen by the relevant ETQA according to the ETQA's policies and guidelines.

- Moderation must include both internal and external moderation of assessments at exit points of the qualification, unless ETQA policies specify otherwise. Moderation should also encompass achievement of the competence described both in individual unit standards as well as the integrated competence described in the qualification.

CRITERIA FOR THE REGISTRATION OF ASSESSORS

Anyone assessing a learner against this qualification must:

• Be registered as assessor with the relevant ETQA or ETQA that has a Memorandum of Understanding in place with the relevant ETQA.
• Be in a possession of a relevant Qualification at NQF Level 5 or higher.
• Have work experience in Phlebotomy.

NOTES

This qualification replaces qualification 48732, "Further Education and Training Certificate: Phlebotomy Techniques", Level 4, 134 credits.

UNIT STANDARDS

	ID	UNIT STANDARD TITLE	LEVEL	CREDITS
Fundamental	119472	Accommodate audience and context needs in oral/signed communication	Level 3	5
Fundamental	119457	Interpret and use information from texts	Level 3	5
Fundamental	119467	Use language and communication in occupational learning programmes	Level 3	5
Fundamental	119465	Write/present/sign texts for a range of communicative contexts	Level 3	5
Fundamental	9015	Apply knowledge of statistics and probability to critically interrogate and effectively communicate findings on life related problems	Level 4	6
Fundamental	119462	Engage in sustained oral/signed communication and evaluate spoken/signed texts	Level 4	5
Fundamental	119469	Read/view, analyse and respond to a variety of texts	Level 4	5
Fundamental	9016	Represent analyse and calculate shape and motion in 2- and 3-dimensional space in different contexts	Level 4	4
Fundamental	119471	Use language and communication in occupational learning programmes	Level 4	5
Fundamental	7468	Use mathematics to investigate and monitor the financial aspects of personal, business, national and international issues	Level 4	6
Fundamental	119459	Write/present/sign for a wide range of contexts	Level 4	5
Core	252395	Care for customers in the medical pathology and blood transfusion fields	Level 3	4
Core	252400	Collect blood for medical pathology and blood transfusion	Level 4	15
Core	252399	Collect non-blood specimens for medical pathology analysis	Level 4	6
Core	252401	Comply with safety requirements in the medical pathology and blood transfusion fields	Level 4	5
Core	252396	Demonstrate knowledge of anatomy, physiology and medical terminology relevant to medical pathology and blood transfusion	Level 4	12
Core	252402	Demonstrate knowledge of medical ethical guidelines in the medical pathology and blood transfusion fields	Level 4	4
Core	252403	Provide HIV pre-test information and support	Level 4	8
Elective	252398	Examine urine and sputum specimens under the microscope	Level 4	10
Elective	252394	Perform specialized phlebotomy procedures	Level 4	4
Elective	252392	Use Point of Care (POC) biomedical instrumentation systems and rapid testing kits for pathology or blood transfusion	Level 4	11
Elective	252397	Work in a blood donor clinic	Level 4	6

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Use Point of Care (POC) biomedical instrumentation systems and rapid testing kits for pathology or blood transfusion

SAQA US ID	*UNIT STANDARD TITLE*		
252392	Use Point of Care (POC) biomedical instrumentation systems and rapid testing kits for pathology or blood transfusion		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	11

SPECIFIC OUTCOME 1
Demonstrate knowledge of the principles of operation of the POC instruments and rapid test kits.

SPECIFIC OUTCOME 2
Perform routine maintenance and quality control on both POC instrumentation systems and rapid test kits.

SPECIFIC OUTCOME 3
Perform the required test.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Elective	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Perform specialized phlebotomy procedures

SAQA US ID	*UNIT STANDARD TITLE*		
252394	Perform specialized phlebotomy procedures		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	4

SPECIFIC OUTCOME 1
Perform tolerance tests.

SPECIFIC OUTCOME 2
Collect samples for blood culture.

SPECIFIC OUTCOME 3
Perform a bleeding time test.

SPECIFIC OUTCOME 4
Perform TB skin prick testing.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Elective	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Care for customers in the medical pathology and blood transfusion fields

SAQA US ID	*UNIT STANDARD TITLE*		
252395	Care for customers in the medical pathology and blood transfusion fields		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 3	4

SPECIFIC OUTCOME 1
Identify customer needs in medical pathology or blood transfusion fields.

SPECIFIC OUTCOME 2
Demonstrate knowledge of communication skills needed to effectively interact with customers.

SPECIFIC OUTCOME 3
Manage customer complaints and queries.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Core	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Demonstrate knowledge of anatomy, physiology and medical terminology relevant to medical pathology and blood transfusion

SAQA US ID	*UNIT STANDARD TITLE*		
252396	Demonstrate knowledge of anatomy, physiology and medical terminology relevant to medical pathology and blood transfusion		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	12

SPECIFIC OUTCOME 1
Demonstrate an understanding of anatomy related to medical pathology and blood transfusion.

SPECIFIC OUTCOME 2
Demonstrate knowledge of the cardio-vascular system.

SPECIFIC OUTCOME 3
Explain medical terminology associated with medical pathology and blood transfusion.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Core	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Work in a blood donor clinic

SAQA US ID	*UNIT STANDARD TITLE*		
252397	Work in a blood donor clinic		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	6

SPECIFIC OUTCOME 1
Demonstrate knowledge of blood transfusion regulations and donor acceptance criteria.

SPECIFIC OUTCOME 2
Demonstrate knowledge of blood products.

SPECIFIC OUTCOME 3
Work in a blood donation clinic.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Elective	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Examine urine and sputum specimens under the microscope

SAQA US ID	*UNIT STANDARD TITLE*		
252398	Examine urine and sputum specimens under the microscope		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	10

SPECIFIC OUTCOME 1
Use the light microscope.

SPECIFIC OUTCOME 2
Identify the Mycobacterium Tuberculosis (TB) bacillus on a slide made from a sputum specimen.

SPECIFIC OUTCOME 3
Operate a centrifuge.

SPECIFIC OUTCOME 4
Examine urine under a microscope.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Elective	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Collect non-blood specimens for medical pathology analysis

SAQA US ID	*UNIT STANDARD TITLE*		
252399	Collect non-blood specimens for medical pathology analysis		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	6

SPECIFIC OUTCOME 1
Comply with pre-collection requirements.

SPECIFIC OUTCOME 2
Collect the specimen.

SPECIFIC OUTCOME 3
Instruct the patient in the self-collection of the required specimen/s.

SPECIFIC OUTCOME 4
Assess the suitability of a specimen collected by the patient.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Core	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Collect blood for medical pathology and blood transfusion

SAQA US ID	*UNIT STANDARD TITLE*		
252400	Collect blood for medical pathology and blood transfusion		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	15

SPECIFIC OUTCOME 1
Comply with pre-collection requirements.

SPECIFIC OUTCOME 2
Prepare for blood collection.

SPECIFIC OUTCOME 3
Collect the blood.

SPECIFIC OUTCOME 4
Comply with post-blood collection requirements.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Core	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Comply with safety requirements in the medical pathology and blood transfusion fields

SAQA US ID	*UNIT STANDARD TITLE*		
252401	Comply with safety requirements in the medical pathology and blood transfusion fields		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	5

SPECIFIC OUTCOME 1
Maintain a safe working environment.

SPECIFIC OUTCOME 2
Demonstrate knowledge of safety equipment.

SPECIFIC OUTCOME 3
Describe infection control relevant to medical pathology and blood transfusion.

SPECIFIC OUTCOME 4
Demonstrate knowledge of the handling of chemicals, gasses and equipment, according to safety regulations.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Core	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Demonstrate knowledge of medical ethical guidelines in the medical pathology and blood transfusion fields

SAQA US ID	*UNIT STANDARD TITLE*		
252402	Demonstrate knowledge of medical ethical guidelines in the medical pathology and blood transfusion fields		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Curative Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	4

SPECIFIC OUTCOME 1
Explain the ethical guidelines relevant to the learner's scope of practice.

SPECIFIC OUTCOME 2
Demonstrate knowledge of patient and/or donor's rights.

SPECIFIC OUTCOME 3
Explain the professional rules applicable to the scope of practice of the learner.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Core	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	

SOUTH AFRICAN QUALIFICATIONS AUTHORITY

UNIT STANDARD:

Provide HIV pre-test information and support

SAQA US ID	*UNIT STANDARD TITLE*		
252403	Provide HIV pre-test information and support		
ORIGINATOR		*PROVIDER*	
SGB Phlebotomy Technicians			
FIELD		*SUBFIELD*	
9 - Health Sciences and Social Services		Preventive Health	
ABET BAND	*UNIT STANDARD TYPE*	*NQF LEVEL*	*CREDITS*
Undefined	Regular	Level 4	8

SPECIFIC OUTCOME 1
Demonstrate an understanding of the effects of HIV and AIDS on the human body.

SPECIFIC OUTCOME 2
Explain how HIV is transmitted.

SPECIFIC OUTCOME 3
Describe the implications of HIV and AIDS pandemic on infected persons, affected individuals and on our society.

SPECIFIC OUTCOME 4
Conduct the pre-test HIV information session.

QUALIFICATIONS UTILISING THIS UNIT STANDARD

	ID	QUALIFICATION TITLE	LEVEL	STATUS	END DATE
Core	59345	Further Education and Training Certificate: Phlebotomy Techniques	Level 4	Draft - Prep for P Comment	