

## UW HEALTH JOB DESCRIPTION

### PHLEBOTOMY TRAINING SPECIALIST

<b>Job Code:</b> 530016	<b>FLSA Status:</b> Non-Exempt	<b>Mgt. Approval:</b> M. Marggi	<b>Date:</b> April 2024
<b>Department:</b> Laboratory Services		<b>HR Approval:</b> S. Whitlock	<b>Date:</b> April 2024

### JOB SUMMARY

The UW Health Phlebotomy Training Specialist provides daily support to laboratory staff regarding laboratory policies and procedures and is responsible for the initial and ongoing education and training, including competency assessments, of Phlebotomy staff, students, and non-laboratory staff (e.g., Emergency Medical Services, Nurse Residents, Medical Assistants, Research Assistants). Under the direction of Phlebotomy Leadership, the Phlebotomy Training Specialist will create, develop, and maintain training curriculum and competency checklists. This includes maintaining records for training and competency. The Phlebotomy Training Specialist will monitor progress and provide feedback to those being trained. While the primary duties are training, the Phlebotomy Training Specialist will also provide complex phlebotomy services for inpatients and outpatients and all duties assigned to the Phlebotomist.

The Phlebotomy Training Specialist will work closely with Laboratory Leadership while monitoring employee development and identifying opportunities for improvement. The Phlebotomy Training Specialist may provide input to employee performance appraisals, improvement plans, and competency assessments. This individual may be involved in the interview/hiring process by providing assessment of candidate's technical skills.

The Phlebotomy Training Specialist is expected to attend educational opportunities related to phlebotomy and may be part of the day-to-day workload in the event there is no need for active training.

### MAJOR RESPONSIBILITIES

- Oversee daily training activities with a focus on safe patient care and satisfaction. Serve as resource to phlebotomy and reception staff.
- Coordinate workflow to ensure timely collection of specimens. Monitor sick call pager. Adjust placements accordingly.
- Serve as technical expert for all collection procedures and assist with difficult draws.
- Oversee training of staff on proper collection of research kits and other special procedures.
- Assist manager or supervisor in implementing schedule changes.
- Review policies as required (i.e., annual review). Recommend policy changes and assist with communication of policy changes to testing staff.
- Participate in survey readiness activities.
- Assist manager or supervisor with activities to support Health Link and Laboratory Information System software changes.
- Provide leadership in troubleshooting computer system problems and implementing downtime procedures.
- Oversee hardware inventory and promptly file Service Now ticket or report issue to management.
- Maintain supply inventory and work closely with hospital central supply services and purchasing to resolve ordering/supply problems. Follow department budget guidelines when purchasing supplies and equipment.
- Assist in eliminating waste and improving supply usage.
- Attend and participate in department and other relevant meetings.
- Participate in continuing education.
- Promote teamwork and participate in process improvement teams as assigned.
- Develop, maintain, and monitor staff training and competency checklists.
- Serve as primary instructor for teaching venipuncture skills to students, new employees, clinical staff from other UW Health departments, Emergency Medical Technician staff, and others as directed by management.
- Serve as primary instructor for teaching blood collection procedures to department staff using department training checklists. Examples include blood cultures and pediatric collection procedures.
- Provide New Employee Orientation assistance as requested by manager or supervisor.
- Prepare and present educational and informative material in and outside of department.
- Develop, conduct, monitor and document new staff training, competencies, and staff in-services related to phlebotomy.
- Conduct staff competency assessments to comply with regulatory requirements. Address any deficiencies and revise training content if indicated.
- Facilitate, monitor, and document completion of mandatory organizational training initiatives.
- Work closely with department manager and lead staff to ensure that the UW Health Phlebotomy training program is current and effective.
- Work with Phlebotomy Leadership to ensure all employees are trained on fire safety and other safety issues.
- Actively participate in mentoring program.
- Follows guidelines related to Health Insurance Portability and Accountability Act, designed to prevent or detect

## UW HEALTH JOB DESCRIPTION

unauthorized disclosure of Protected Health Information.

- Promote culture of safety for patients through proper identification, proper reporting, documentation, and prevention of medical errors in a non-punitive environment.
- Communicate regularly with managers to relay problems or concerns.
- Assist in quality assurance activities. Assist in the total quality management in all aspects of training, testing, and quality review.
- Perform additional duties as assigned.

**ALL DUTIES AND REQUIREMENTS MUST BE PERFORMED CONSISTENT WITH THE UW HEALTH PERFORMANCE STANDARDS.**

### JOB REQUIREMENTS

Education	Minimum	High School Diploma or equivalent.
	Preferred	Completion of accredited phlebotomy training program and clinical rotation.
Work Experience	Minimum	Three (3) years of experience in phlebotomy, with at least one (1) year of that experience in pediatric phlebotomy. One (1) year of mentoring experience.
	Preferred	One (1) year of experience being a trainer in a healthcare setting.
Licenses & Certifications	Minimum	
	Preferred	Basic Life Support/CPR certification. Phlebotomist (American Society for Clinical Pathology) or equivalent.
Required Skills, Knowledge, and Abilities		<ul style="list-style-type: none"> <li>• Evidence of training, mentoring, or teaching experience. Ability to present information in multiple ways, to meet the needs of individual learners.</li> <li>• Demonstrated leadership skills.</li> <li>• Strong interpersonal skills.</li> <li>• Self-motivated and responsible, ability to work without direct supervision.</li> <li>• Ability to meet deadlines and multi-task.</li> <li>• Strong communication skills.</li> <li>• Tolerance to an acute care setting.</li> <li>• Demonstrated organizational skills with strong attention to detail.</li> <li>• Demonstrated problem-solving skills.</li> <li>• Knowledge of quality control and quality assurance.</li> <li>• Demonstrated skill with laboratory information systems.</li> <li>• Knowledge of The Joint Commission, College of American Pathologists, and Clinical Laboratory Improvement Amendments regulations related to work area.</li> <li>• Expert understanding of the duties of Phlebotomist and Phlebotomist Lead.</li> </ul>

### AGE SPECIFIC COMPETENCY (Clinical jobs only)

Identify age-specific competencies for direct and indirect patient care providers who regularly assess, manage and treat patients.

**Instructions:** Indicate the age groups of patients served either by direct or indirect patient care by checking the appropriate boxes below.  
Next,

<input checked="" type="checkbox"/>	Infants (Birth – 11 months)	<input checked="" type="checkbox"/>	Adolescent (13 – 19 years)
<input checked="" type="checkbox"/>	Toddlers (1 – 3 years)	<input checked="" type="checkbox"/>	Young Adult (20 – 40 years)
<input checked="" type="checkbox"/>	Preschool (4 – 5 years)	<input checked="" type="checkbox"/>	Middle Adult (41 – 65 years)
<input checked="" type="checkbox"/>	School Age (6 – 12 years)	<input checked="" type="checkbox"/>	Older Adult (Over 65 years)

### JOB FUNCTIONS

Review the employee's job description and identify each essential function that is performed differently based on the age group of the patient.

### PHYSICAL REQUIREMENTS

**Indicate the appropriate physical requirements of this job in the course of a shift.** *Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.*

Physical Demand Level	Occasional Up to 33% of the time	Frequent 34%-66% of the time	Constant 67%-100% of the time
<b>Sedentary:</b> Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as dockets, ledgers and small tools. Although a sedentary job is defined as one, which involves sitting, a certain amount of walking and standing is often necessary in	<b>Up to 10#</b>	<b>Negligible</b>	<b>Negligible</b>

## UW HEALTH JOB DESCRIPTION

	carrying out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met.			
<b>X</b>	<b>Light:</b> Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as docket, ledgers and small tools. Although a sedentary job is defined as one, which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met.	<b>Up to 20#</b>	<b>Up to 10#</b> or requires significant walking or standing, or requires pushing/pulling of arm/leg controls	<b>Negligible</b> or constant push/pull of items of negligible weight
	<b>Medium:</b> Ability to lift up to 50 pounds maximum with frequent lifting/and or carrying objects weighing up to 25 pounds.	<b>20-50#</b>	<b>10-25#</b>	<b>Negligible-10#</b>
	<b>Heavy:</b> Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds.	<b>50-100#</b>	<b>25-50#</b>	<b>10-20#</b>
	<b>Very Heavy:</b> Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds.	<b>Over 100#</b>	<b>Over 50#</b>	<b>Over 20#</b>
List any other physical requirements or bona fide occupational qualifications:				

Note: The purpose of this document is to describe the general nature and level of work performed by personnel so classified; it is not intended to serve as an inclusive list of all responsibilities associated with this position.