

# Phlebotomy Essentials

**ENHANCED**  
Seventh Edition





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*To my amazing former coauthor Cathee Tankersley, my husband John, my sons Chris and Scott, and daughter-in-law Tracy, my grandchildren Katie and Ryan and all my extended family and friends who supported and encouraged this effort.*

**Ruth E. McCall**



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since. She was the Director of the Phlebotomy and Clinical Laboratory Assistant Programs at Central New Mexico (CNM) Community College in Albuquerque, New Mexico for 18 years until she retired to pursue other related activities. Recently she happily returned to CNM as a part-time phlebotomy instructor. Ruth has lectured on phlebotomy

topics at conferences throughout the United States, participated in a medical technology exchange in China where she gave phlebotomy presentations at several medical universities, and has served as an expert witness in phlebotomy injury cases. She is currently a member of the Clinical and Laboratory Standards Institute (CLSI) Document Development Committee working on the seventh revision of the Capillary Puncture Standard (GP42). Ruth also had the privilege of being a member of the CLSI committee that revised the seventh edition of the Venipuncture Standard (GP41).

Ruth loves the outdoors and enjoys hiking in the beautiful southwest, chasing balloons during the Albuquerque International Balloon Fiesta, downhill skiing in the mountains of Colorado, and walks along the ocean in Cocoa Beach, Florida. She is married to her true love John, and has two sons, Christopher and Scott. Christopher and his wife Tracy are parents of her fantastic grandchildren, Katie and Ryan.



# Preface

*Phlebotomy Essentials, Enhanced Seventh Edition*, was written for all who want to correctly and safely practice phlebotomy. The author has over 40 years of experience in laboratory sciences, phlebotomy program direction, and teaching many different levels and diverse populations of phlebotomy students. As with previous editions, the goal of *Phlebotomy Essentials, Enhanced Seventh Edition*, is to provide accurate, up-to-date, and practical information and instruction in phlebotomy procedures and techniques, along with a comprehensive background in phlebotomy theory and principles. It is appropriate for use as an instructional text or as a reference for those who wish to update skills or study for national certification.

## Organization

Much care has been taken to present the material in a clear and concise manner that encourages learning and promotes comprehension. A good deal of time was spent organizing and formatting the information into a logical and student-friendly reading style in an order that allows the reader to build on information from previous chapters.

The book is divided into four units. Unit I, The Healthcare Setting, presents a basic description of the healthcare system and the role of the phlebotomist within it. Major topics include communication skills, healthcare financing, and delivery with an emphasis on clinical laboratory services, quality assurance, and legal issues and their relationship to the standard of care, and comprehensive instruction in infection control and safety.

Unit II, Overview of the Human Body, provides a foundation in medical terminology and a basic understanding of each of the body systems, including associated disorders and diagnostic tests. An entire chapter is devoted to the circulatory system, with special emphasis on the vascular system, including blood vessel structure, vascular anatomy of the arm, and blood composition.

Unit III, Blood Collection Procedures, describes phlebotomy equipment (including the latest safety equipment and order of draw) and proper procedures and techniques for collecting venipuncture and capillary specimens based upon the latest CLSI standards. Also included is an extensive explanation of preanalytical

variables, complications, and procedural errors associated with blood collection.

Unit IV, Special Procedures, offers information and instruction on how to handle special blood and non-blood specimen collections and the latest in point-of-care instruments and testing. Routine and special handling and processing of specimens, with an emphasis on the latest rules of safety are described in this section. Included in this unit is an overview of the laboratory information system (LIS) including how it supports the laboratory process and is an essential part of the network of healthcare communication. Also included is information on nonblood specimens and testing, which can be an important part of the phlebotomist's responsibilities, as well as arterial puncture for those phlebotomists who currently draw arterial blood gases or who anticipate advancing beyond venous collection.

## Features

The enhanced seventh edition includes various features meant to help the reader learn and retain the information in *Phlebotomy Essentials*.

- The applicable **NAACLS competencies** listed at the beginning of each chapter serve as an aid to the instructors of approved programs or programs seeking approval and an assurance to students that they are learning material expected of a graduate of a phlebotomy program.
- **Key Terms** and **Learning Objectives** begin each chapter and help students recognize important terms and concepts they will come across while reading the chapter.
- Consistently organized step-by-step **Procedures** with an explanation or rationale for each step assist the student in learning and understanding phlebotomy techniques.
- **Key Points** emphasize important concepts to enhance student learning and reinforce the significance of the stated information.
- **Cautions** highlight critical information to help students identify and avoid dangerous practices.

- **FYIs** add interesting notes and fun facts that will enhance practical application of the information.
- **Memory Joggers** offer a proven way to aid some students in remembering important information.
- New **Law and Ethics** boxes highlight potential ethical and legal dilemmas phlebotomists face.
- Additional **Study and Review Questions** at the conclusion of each chapter provide a review of content covered in the chapter.
- **Case Studies** bring concepts to life and enhance critical thinking skills at the end of each chapter.
- A **Media Menu** at the end of each chapter points out online student resources available for that chapter.
- **Book icons** throughout the text refer readers to *Student Workbook for Phlebotomy Essentials* and *Phlebotomy Exam Review*, available for separate purchase, for further opportunities to enrich their learning.
- **Online icons** throughout the text refer readers to corresponding videos and animations on the book's companion website that bring the content to life (see "Additional Resources," below, for more information on these resources).

The content in this new edition of *Phlebotomy Essentials* was designed in accordance with applicable National Accrediting Agency for Clinical Laboratory Science (NAACLS) competencies. Procedures have been written to conform to the latest OSHA safety regulations and, wherever applicable, standards developed by the Clinical and Laboratory Standards Institute (CLSI).

## Additional Resources

*Phlebotomy Essentials, Enhanced Seventh Edition*, includes additional resources for both instructors and students that are available on the book's companion website.

### Instructors

Approved adopting instructors will be given access to the following additional resources:

- Lesson Plans
- Pre- and Post-Test Questions
- Image Bank
- Test Bank
- PowerPoint Slides with images and tables
- Signature Papers (i.e., HIPAA/confidentiality forms, bloodborne pathogen statements, assumption of risk form, health declaration form)

- Syllabus
- Procedure Evaluation Forms

### Students

Students who have purchased *Phlebotomy Essentials, Enhanced Seventh Edition*, have access to the following additional resources:

- Procedure videos
- Animations of key concepts
- Flash cards
- An audio glossary

See the inside front cover of this text for more details, including the passcode you will need to gain access to the website.

## Related Titles

The following two titles that correspond to *Phlebotomy Essentials, Enhanced Seventh Edition*, are available for separate purchase to create an ideal study package for phlebotomy training programs. Each corresponds to this main textbook in chapter sequence.

- Companion Workbook provides students with chapter-by-chapter exercises to reinforce text material, assessment tools to evaluate their skills, realistic scenarios to gauge their grasp of key concepts, and skills logs to chart their progress. The Workbook includes key terms matching exercises, chapter review questions, crossword puzzles, skill and knowledge drills, requisition activities, case studies, and procedure evaluation forms.
- Companion Exam Review book prepares students for national certification exams in phlebotomy.

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**Ruth E. McCall**



# Brief Contents

## Unit I The Healthcare Setting 1

- 1 Phlebotomy: Past and Present and the Healthcare Setting 2
- 2 Quality Assurance and Legal Issues in Healthcare 35
- 3 Infection Control, Safety, First Aid, and Personal Wellness 60

## Unit II Overview of the Human Body 103

- 4 Medical Terminology 104
- 5 Human Anatomy and Physiology Review 117
- 6 The Circulatory System 145

## Unit III Blood Collection Procedures 182

- 7 Blood Collection Equipment, Additives, and Order of Draw 183
- 8 Venipuncture Procedures 214
- 9 Preexamination/Preanalytical Considerations 272
- 10 Capillary Puncture Equipment, Principles and Procedures 303

## Unit IV Special Procedures 336

- 11 Special Collections and Point-of-Care Testing 337
- 12 Computers and Specimen Handling and Processing 374
- 13 Urine and Other Nonblood Specimens and Tests 403
- 14 Arterial Puncture Procedures 435

*Appendix A Laboratory Tests 453*

*Appendix B Laboratory Mathematics 461*

*Appendix C Conversational Phrases in English and Spanish 466*

*Appendix D Work Restrictions for Healthcare Employees 468*

*Appendix E Answers to Study and Review Questions and Case Studies 469*

*Appendix F Tube Guides 476*

**Glossary 480**

**Index 499**



# Detailed Contents

<i>Reviewers</i>	vi
<i>About the Author</i>	viii
<i>Preface</i>	ix
<i>List of Procedures</i>	xxvii
<i>User's Guide</i>	xxviii

## Unit I. The Healthcare Setting



### 1

## Phlebotomy: Past and Present and the Healthcare Setting 2

NAACLS Entry Level Competencies	2
Key Terms	2
Objectives	2
<b>Phlebotomy: The Past</b>	<b>3</b>
<b>Phlebotomy: The Present</b>	<b>4</b>
The Changing Role of the Phlebotomist	5
Education Standards	6
Official Recognition	6
<i>Certification</i>	6
<i>Licensure</i>	6
<i>Continuing Education</i>	6
Patient Interaction	7
<i>Recognizing Diversity</i>	7
<i>Professionalism</i>	7
<i>Patients' Rights</i>	8
<i>Confidentiality</i>	8
<i>HIPAA</i>	9
Communication	9
<i>Interpersonal Communication Components</i>	10
<i>Effective Communication in Healthcare</i>	12
<b>The Healthcare Setting</b>	<b>14</b>
Healthcare Delivery	14
<i>Nonambulatory Care and Inpatient Services</i>	14
<i>Ambulatory Care and Outpatient Services</i>	16
<i>Public Health Service</i>	16
Healthcare Financing	17
<i>Third-Party Payers</i>	17
<i>Diagnosis and Billing Codes</i>	17
<i>Reimbursement</i>	18

<i>Accountable Care Organizations</i>	19
<i>Managed Care</i>	19
Clinical Laboratory Services	20
<i>Traditional Laboratories</i>	20
<i>Satellite Laboratories</i>	29
<i>Reference Laboratories</i>	29
Clinical Laboratory Personnel	30
<i>Laboratory Director/Pathologist</i>	30
<i>Laboratory Administrator/Laboratory Manager</i>	30
<i>Technical Supervisor</i>	30
<i>Medical Technologist/Medical Laboratory Scientist</i>	30
<i>Medical Laboratory Technician</i>	31
<i>Clinical Laboratory Assistant</i>	31
<i>Phlebotomist</i>	31
<i>Other Laboratory Personnel</i>	31
Study and Review Questions	32
Case Studies	33
References	33
Media Menu	34

## 2

## Quality Assurance and Legal Issues in Healthcare 35

NAACLS Entry Level Competencies	35
Key Terms	35
Objectives	35
<b>Quality Assurance in Healthcare</b>	<b>36</b>
National Standard Organizations and Regulatory Agencies	36
<i>The Joint Commission</i>	36
<i>The Institute for Healthcare Improvement</i>	37
<i>Clinical Laboratory Improvement Amendments of 1988</i>	37
<i>College of American Pathologists</i>	38
<i>Clinical and Laboratory Standards Institute</i>	39
<i>National Accrediting Agency for Clinical Laboratory Sciences</i>	39
<i>International Organization for Standardization</i>	39
Quality Assurance in Phlebotomy	39
QA Processes	39
Quality Indicators	40
Thresholds and Data	40
Process and Outcomes	41
Quality Control (QC)	41
Areas of Phlebotomy Subject to QA	42
<i>Patient Preparation Procedures</i>	42
<i>Specimen Collection Procedures</i>	42
<i>Delta Checks</i>	44
Documentation	44
<i>The Patient's Record</i>	44
<i>Test Catalogs and Reference Manuals</i>	45
<i>The Procedure Manual</i>	45
<i>The Safety Manual</i>	45
<i>The Infection Prevention and Control Manual</i>	45
QA Forms	46
Risk Management	49
Sexual Harassment	51
<b>Legal Issues in Healthcare</b>	<b>51</b>

Tort	52
Malpractice Insurance	53
Avoiding Lawsuits	54
Patient Consent	54
<i>Informed Consent</i>	54
<i>Expressed/Express</i>	54
<i>Implied Consent</i>	54
<i>HIV Consent</i>	54
<i>Consent for Minors</i>	55
<i>Refusal of Consent</i>	55
The Litigation Process	55
Legal Cases Involving Phlebotomy Procedures	56
<i>Case 1: A Negligence Case Settled through Binding Arbitration</i>	56
<i>Case 2: A Negligence Case Settled through Binding Arbitration</i>	56
<i>Case 3: A Negligence Case Settled through Binding Arbitration</i>	56
<i>Case 4: Congleton Versus Baton Rouge General Hospital</i>	56
<i>Case 5: Jury Verdict Affirmed on Appeal by Kentucky Supreme Court</i>	56
Study and Review Questions	57
Case Studies	58
References	58
Media Menu	59

### 3

## Infection Control, Safety, First Aid, and Personal Wellness 60

NAACLS Entry Level Competencies	60
Key Terms	60
Objectives	60
<b>Infection Control</b>	<b>61</b>
Infection	61
<i>Communicable Infections</i>	61
<i>Nosocomial and Healthcare-Associated Infections</i>	61
<i>Antibiotic-Resistant Infections</i>	62
The Chain of Infection	63
<i>Chain-of-Infection Components</i>	64
<i>Breaking the Chain of Infection</i>	65
Infection Control Programs	65
<i>Employee Screening</i>	66
<i>Employee Immunization</i>	66
<i>Evaluation and Treatment</i>	66
<i>Surveillance</i>	66
Infection Control Practices	67
<i>Hand Hygiene</i>	67
<i>Personal Protective Equipment</i>	70
<i>Sequence for Donning and Removing PPE</i>	72
<i>Asepsis and Aseptic Technique</i>	73
<i>Nursery and Neonatal ICU Infection Control Technique</i>	73
Isolation Procedures	73
<i>Protective/Reverse Isolation</i>	73
<i>Universal Precautions</i>	74
<i>Body Substance Isolation</i>	74
<i>Guideline for Isolation Precautions</i>	74
<b>Safety</b>	<b>76</b>
Biosafety	79

Biohazard	80
Bloodborne Pathogens	82
OSHA Bloodborne Pathogens Standard	84
Needlestick Safety and Prevention Act	84
Exposure Control Plan	84
BBP Exposure Routes	84
Exposure Incident Procedure	85
Surface Decontamination	86
Cleanup of Body Fluid Spills	86
Biohazard Waste Disposal	86
Chemical Safety	86
OSHA Hazard Communication Standard	87
Department of Transportation Labeling System	88
National Fire Protection Association Labeling System	88
Safety Showers and Eyewash Stations	90
Chemical Spill Procedures	92
Electrical Safety	92
Fire Safety	92
Fire Components	93
Classes of Fire	93
Fire Extinguishers	94
Radiation Safety	94
<b>First Aid</b>	<b>96</b>
External Hemorrhage	96
Shock	96
Common Symptoms of Shock	96
First Aid for Shock	96
Cardiopulmonary Resuscitation and Emergency Cardiovascular Care	96
American Heart Association CPR and ECC Guidelines	97
AHA ECC Adult Chains of Survival	97
<b>Personal Wellness</b>	<b>97</b>
Proper Nutrition	98
Rest and Exercise	98
Personal Hygiene	99
Back Protection	99
Stress Management	99
Study and Review Questions	100
Case Studies	101
References	102
Media Menu	102

## Unit II. Overview of the Human Body



### 4

## Medical Terminology 104

NAACLS Entry Level Competencies	104
Key Terms	104
Objectives	104
Word Roots	105
Prefixes	105

Suffixes	105
Combining Vowels/Forms	105
Discrepancies in the Classification of Word Elements	107
Unique Plural Endings	107
Pronunciation	108
Abbreviations and Symbols	108
The Joint Commission's "Do Not Use" List	108
Study and Review Questions	114
Case Studies	115
References	116
Media Menu	116

## 5

### Human Anatomy and Physiology Review 117

NAACLS Entry Level Competencies	117
Key Terms	117
Objectives	117
Body Positions	118
<i>Anatomic Position</i>	118
<i>Other Positions</i>	118
Body Planes	118
Body Directional Terms	119
Body Cavities	119
Body Functions	120
<i>Homeostasis</i>	120
<i>Metabolism</i>	120
Body Organization	120
<i>Chemicals</i>	121
<i>Cells</i>	121
<i>Tissues</i>	122
<i>Organs</i>	122
Body Systems	123
<i>Integumentary System</i>	123
<i>Muscular System</i>	125
<i>Skeletal System</i>	126
<i>Nervous System</i>	128
<i>Endocrine System</i>	130
<i>Digestive System</i>	133
<i>Reproductive System</i>	133
<i>Urinary System</i>	136
<i>Respiratory System</i>	138
Study and Review Questions	142
Case Studies	143
References	144
Media Menu	144

## 6

### The Circulatory System 145

NAACLS Entry Level Competencies	145
Key Terms	145
Objectives	145

The Heart	146
<i>Heart Structure</i>	146
<i>Heart Function</i>	148
<i>Heart Disorders and Diagnostic Tests</i>	151
The Vascular System	151
<i>Functions</i>	152
<i>Structures</i>	152
<i>Blood Vessel Structure</i>	155
<i>The Flow of Blood</i>	156
<i>Phlebotomy-Related Vascular Anatomy</i>	158
<i>Vascular System Disorders and Diagnostic Tests</i>	164
The Blood	164
<i>Blood Composition</i>	164
<i>Blood Type</i>	168
<i>Blood Specimens</i>	169
<i>Blood Disorders and Diagnostic Tests</i>	171
Hemostasis and Coagulation	171
<i>Hemostasis</i>	171
<i>Coagulation</i>	171
<i>The Hemostatic Process In Vivo</i>	174
<i>The Role of the Liver in Hemostasis</i>	177
<i>Hemostatic Disorders and Diagnostic Tests</i>	177
The Lymphatic System	177
<i>Functions</i>	177
<i>Structures</i>	177
<i>Lymph Flow</i>	177
<i>Lymphatic System Disorders and Diagnostic Tests</i>	178
Study and Review Questions	179
Case Studies	181
References	181
Media Menu	181

## Unit III. Blood Collection Procedures



### 7

## Blood Collection Equipment, Additives, and Order of Draw 183

NAACLS Entry Level Competencies	183
Key Terms	183
Objectives	183
<b>Blood Collection Equipment</b>	<b>184</b>
General Blood Collection Equipment and Supplies	184
<i>Blood-Drawing Station</i>	184
<i>Phlebotomy Chairs</i>	184
<i>Equipment Carriers</i>	185
<i>Gloves and Glove Liners</i>	185
<i>Antiseptics</i>	186
<i>Disinfectants</i>	187
<i>Hand Sanitizers</i>	187
<i>Gauze Pads</i>	188
<i>Bandages</i>	188
<i>Needle and Sharps Disposal Containers</i>	188

<i>Biohazard Bags</i>	188
<i>Slides</i>	189
<i>Pen</i>	189
<i>Watch</i>	189
<i>Patient Identification Equipment</i>	189
Venipuncture Equipment	189
<i>Vein-Locating Devices</i>	189
<i>Tourniquet</i>	189
<i>Needles</i>	190
<i>Evacuated Tube System</i>	193
<i>Syringe System</i>	198
<i>Blood Collection Sets</i>	201
<i>Combination Systems</i>	203
<b>Blood Collection Additives</b>	<b>203</b>
Anticoagulants	204
<i>EDTA</i>	204
<i>Citrates</i>	205
<i>Heparin</i>	205
<i>Oxalates</i>	206
Special-Use Anticoagulants	206
<i>Acid Citrate Dextrose</i>	206
<i>Citrate Phosphate Dextrose</i>	207
<i>Sodium Polyanethol Sulfonate</i>	207
Antiglycolytic Agents	207
Clot Activators	207
Serum or Plasma Separator Tubes	207
<i>Thixotropic Gel Separator</i>	208
<i>Nongel Separator</i>	208
Trace Element-Free Tubes	208
<b>Order of Draw</b>	<b>208</b>
CLSI Order of Draw	209
Carryover/Cross-Contamination	209
Tissue Thromboplastin Contamination	210
Microbial Contamination	210
Study and Review Questions	211
Case Studies	212
References	213
Media Menu	213

## 8

**Venipuncture Procedures 214**

NAACLS Entry Level Competencies	214
Key Terms	214
Objectives	214
Patient Registration	215
Requests for Testing	215
The Test Requisition	215
<i>Manual Requisitions</i>	215
<i>Computer-Generated Requisitions</i>	216
<i>Barcode Requisitions</i>	216
Venipuncture Steps	217
<i>Step 1: Receive, Review, and Accession Test Request</i>	217
<i>Step 2: Approach, Greet, and Identify the Patient</i>	218
<i>Step 3: Explain the Procedure and Obtain Consent</i>	225

Step 4: Verify Collection Requirements, and Identify Sensitivities and Potential Problems	227
Step 5: Sanitize Hands and Put on Gloves	228
Step 6: Position Patient, Apply Tourniquet, and Ask the Patient to Make a Fist	229
Step 7: Select a Vein, Release the Tourniquet, and Ask the Patient to Open the Fist	233
Step 8: Clean and Air-Dry the Site	234
Step 9: Prepare Collection Equipment	236
Step 10: Reapply the Tourniquet, and Uncap and Inspect the Needle	237
Step 11: Ask the Patient to Remake a Fist, Anchor the Vein, and Insert the Needle	237
Step 12: Establish Blood Flow, Release the Tourniquet, and Ask the Patient to Open the Fist	240
Step 13: Fill, Remove, and Mix Tubes in Order of Draw, or Fill Syringe	240
Step 14: Withdraw the Needle, Place Gauze, Activate the Needle Safety Feature, and Apply Pressure	242
Step 15 (ETS): Discard Blood Collection Unit	242
Step 15 (Syringe System): Discard Needle, Attach Transfer Device, Transfer Blood, and Discard Syringe and Transfer Device Unit	242
Step 16: Label and Prepare Tubes for Handling and Transport	243
Step 17: Check the Patient's Arm, and Apply a Bandage	244
Step 18: Dispose of Used Materials, and Reposition Moved Items	244
Step 19: Thank the Patient, Remove Gloves, and Sanitize Hands	244
Step 20: Transport Specimen to the Lab Promptly	244
Routine ETS Venipuncture Procedure	244
Blood Collection Set Procedure	244
Syringe Venipuncture Procedure	252
Procedure for Inability to Collect Specimen	255
Pediatric Venipuncture	260
Challenges	260
Iatrogenic Anemias in Infants and Children	261
Dealing With Parents or Guardians	261
Dealing With the Child	261
Involvement of the Child Life Specialist	261
Pain Interventions	262
Selecting a Method of Restraint	262
Equipment Selection	262
Procedures	263
Geriatric Venipuncture	263
Challenges	263
Safety Issues	265
Patients in Wheelchairs	265
Blood Collection Procedures	266
Dialysis Patients	266
Long-Term Care Patients	267
Home Care Patients	267
Hospice Patients	267
Study and Review Questions	268
Case Studies	270
References	270
Media Menu	271

## 9

## Preexamination/Preanalytical Considerations 272

NAACLS Entry Level Competencies	272
Key Terms	272
Objectives	272
Reference Ranges/Intervals	273
Basal State	273

Physiologic Variables	273
Age	273
Altitude	273
Dehydration	274
Diet	274
Diurnal/Circadian Variations	275
Drug Therapy	275
Exercise	276
Fever	276
Sex	276
Intramuscular Injection	276
Jaundice	276
Position	277
Pregnancy	277
Smoking	277
Stress	278
Environmental Factors	278
Problem Sites	278
Burns, Scars, and Tattoos	278
Damaged Veins	278
Edema	279
Hematoma	279
Mastectomy	279
Obesity	279
Paralysis	280
Vascular Access Devices and Sites	280
Intravenous Line	280
IV Catheter Lock	281
Previously Active IV Sites	282
Arterial Line	282
Arteriovenous Shunt, Fistula, or Graft	282
Blood Sampling Device	282
Central Vascular Access Devices	283
Patient Complications and Conditions	284
Allergies to Equipment and Supplies	284
Excessive Bleeding	285
Fainting	286
Nausea and Vomiting	287
Pain	287
Petechiae	288
Seizures/Convulsions	288
Procedural Error Risks	289
Hematoma Formation and Bruising	289
Iatrogenic Anemia	289
Inadvertent Arterial Puncture	290
Infection	290
Nerve Injury	290
Reflux of Additive	291
Vein Damage	292
Procedural Error and Specimen Quality Concerns	292
Hemoconcentration	292
Hemolysis	292
Partially Filled Tubes	293
Specimen Contamination	294
Wrong or Expired Collection Tube	295

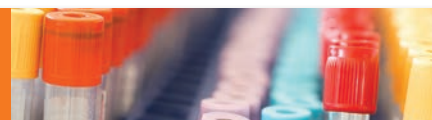
Troubleshooting Failed Venipuncture	295
<i>Tube Position</i>	295
<i>Needle Position</i>	295
<i>Collapsed Vein</i>	298
<i>Tube Vacuum</i>	298
Study and Review Questions	299
Case Studies	300
References	301
Media Menu	302

## 10

**Capillary Puncture Equipment, Principles and Procedures 303**

NAACLS Entry Level Competencies	303
Key Terms	303
Objectives	304
Capillary Puncture Equipment	304
<i>Lancets/Incision Devices</i>	304
<i>Microcollection Containers/Microtubes</i>	304
<i>Microhematocrit Tubes and Sealants</i>	305
<i>Capillary Blood Gas Equipment</i>	307
<i>Microscope Slides</i>	307
<i>Warming Devices</i>	307
Capillary Puncture Principles	308
<i>Composition of Capillary Specimens</i>	308
<i>Reference Values</i>	308
<i>Indications for Capillary Puncture</i>	308
<i>Tests That Cannot Be Collected by Capillary Puncture</i>	309
<i>Order of Draw</i>	309
General Capillary Puncture Steps	309
<i>Step 6: Position the Patient</i>	309
<i>Step 7: Select the Puncture Site</i>	310
<i>Step 8: Warm the Site if Applicable</i>	312
<i>Step 9: Clean and Air-Dry the Site</i>	313
<i>Step 10: Prepare Equipment</i>	313
<i>Step 11: Grasp the Finger or Heel Firmly</i>	313
<i>Step 12: Position the Lancet, Puncture the Site, and Discard the Lancet</i>	313
<i>Step 13: Lower the Finger or Heel, and Apply Gentle Pressure Until a Blood Drop Forms</i>	313
<i>Step 14: Wipe Away the First Blood Drop</i>	314
<i>Step 15: Fill and Mix the Tubes/Containers in Order of Draw</i>	314
<i>Step 16: Place Gauze, Apply Pressure, and Elevate the Site</i>	314
<i>Step 17: Label and Prepare Specimens for Handling and Transport</i>	315
<i>Step 18: Check the Site, and Apply a Bandage</i>	315
<i>Step 19: Discard Used Materials, Thank the Patient, Remove Gloves, and Sanitize the Hands</i>	315
<i>Step 20: Transport the Specimen to the Lab Promptly</i>	315
Capillary Puncture Procedures	315
<i>Capillary Blood Gases</i>	321
<i>Neonatal Bilirubin Collection</i>	323
<i>Newborn/Neonatal Screening</i>	324
<i>Routine Blood Film/Smear Preparation</i>	327
<i>Thick Blood Smear Preparation</i>	332
Study and Review Questions	332
Case Studies	334
References	334
Media Menu	335

## Unit IV. Special Procedures



### 11 Special Collections and Point-of-Care Testing 337

NAACLS Entry Level Competencies	337
Key Terms	337
Objectives	338
<b>Special Collections</b>	<b>338</b>
Blood Bank Specimens	338
<i>Identification and Labeling Requirements</i>	338
<i>Special Identification Systems</i>	338
<i>Specimen Requirements</i>	340
<i>Type, Screen, and Cross-Match</i>	340
Blood Donor Collection	340
<i>Donor Eligibility</i>	340
<i>Lookback Program</i>	341
<i>Autologous Donation</i>	341
<i>Cell Salvaging</i>	341
Blood Cultures	341
<i>Sepsis</i>	342
<i>Indications of Septicemia</i>	342
<i>Specimen Requirements</i>	342
<i>Timing Considerations</i>	342
<i>Recommended Volume</i>	343
<i>Specimen Collection</i>	343
<i>Initial Specimen Diversion</i>	344
<i>Media Inoculation Methods</i>	344
<i>Blood Culture Collection Procedure</i>	345
<i>Antimicrobial Neutralization Products</i>	349
<i>Pediatric Blood Culture Considerations</i>	350
<i>Catheter Considerations</i>	351
Coagulation Specimens	351
Two-Hour Postprandial Glucose	351
Glucose Tolerance Test	352
<i>GTT Preparation and Procedure</i>	353
Oral Glucose Challenge Test	353
Lactose Tolerance Test	353
Molecular Genetic Testing	354
Parental/Paternity Testing	355
Therapeutic Drug Monitoring	355
Therapeutic Phlebotomy	357
<i>Polycythemia</i>	357
<i>Hemochromatosis</i>	357
Toxicology Specimens	357
<i>Forensic Specimens</i>	357
<i>Blood Alcohol (Ethanol) Specimens</i>	358
<i>Drug Screening</i>	358
Trace Elements	358
Tuberculosis Blood Tests	359
<i>Interferon-Gamma Release Assays</i>	359
<b>Point-of-Care Testing</b>	<b>360</b>
POCT Quality Control	361

POCT Infection Control Issues	361
POC Coagulation Monitoring	361
<i>Activated Clotting Time</i>	362
<i>Prothrombin/International Normalized Ratio</i>	362
<i>Platelet Function</i>	363
Arterial Blood Gases and Electrolytes	363
<i>Arterial Blood Gases</i>	364
<i>Electrolytes</i>	364
Multiple-Test-Panel Monitoring by POCT	364
Other POC Tests	366
<i>B-Type Natriuretic Peptide</i>	366
<i>Bilirubin Testing</i>	366
<i>Cardiac Troponin T and I</i>	366
<i>Complete Blood Count</i>	366
<i>C-Reactive Protein</i>	367
<i>Glucose</i>	367
<i>Glycohemoglobin/Hemoglobin A1c</i>	368
<i>Hematocrit</i>	369
<i>Hemoglobin</i>	369
<i>Lactate</i>	370
<i>Lipid/Cholesterol Testing</i>	370
<i>Rapid Syphilis Test</i>	370
Study and Review Questions	371
Case Studies	372
References	373
Media Menu	373

## 12

## Computers and Specimen Handling and Processing 374

NAACLS Entry Level Competencies	374
Key Terms	374
Objectives	374
<b>Computers</b>	<b>375</b>
Computerization in Healthcare	375
<i>Computer Literacy</i>	375
<i>Computer Components</i>	375
<i>Computer System Elements</i>	376
<i>Computer Networks</i>	377
<i>Computer Security</i>	377
Laboratory Informatics	378
<i>Laboratory Information System</i>	378
<i>General Laboratory Computer Skills</i>	380
<i>Computerized Analyzers</i>	382
<i>Interfacing and Integrating</i>	382
<i>Connectivity Industry Consortium</i>	382
<i>Computerization and Connectivity</i>	382
<b>Specimen Handling and Processing</b>	<b>383</b>
Specimen Handling	384
<i>Transporting Specimens</i>	384
<i>Special Handling</i>	389
Specimen Processing	391
<i>OSHA-Required Protective Equipment</i>	391
<i>Specimen Suitability</i>	391
<i>Specimens Not Requiring Further Processing</i>	392

<i>Specimens That Require Centrifugation</i>	393
<i>Precentrifugation</i>	393
<i>Centrifugation</i>	394
<i>Postcentrifugation</i>	396
<i>Secondary Tube or Aliquot Preparation</i>	397
<i>Platelet-Poor Plasma</i>	398
<i>Specimen Storage</i>	398
<i>Reporting Results</i>	399
Study and Review Questions	400
Case Studies	401
References	402
Media Menu	402

# 13

## Urine and Other Nonblood Specimens and Tests 403

NAACLS Entry Level Competencies	403
Key Terms	403
Objectives	403
Nonblood Specimen Types	404
Nonblood Specimen Labeling	404
Nonblood Specimen Handling	404
Nonblood POCT Quality Control	404
Urine	404
<i>Types of Urine Specimens</i>	405
<i>Common Urine Tests</i>	408
Other Nonblood Body Fluids	419
<i>Amniotic Fluid</i>	419
<i>Cerebrospinal Fluid</i>	420
<i>Gastric Fluid/Gastric Analysis</i>	421
<i>Nasopharyngeal Secretions</i>	421
<i>Saliva</i>	422
<i>Semen</i>	422
<i>Serous Fluid</i>	422
<i>Sputum</i>	422
<i>Sweat</i>	423
<i>Synovial Fluid</i>	423
Other Nonblood Specimens	424
<i>Bone Marrow</i>	424
<i>Breath Samples</i>	424
<i>Buccal/Oral Specimens</i>	425
<i>Cervical Smear/Pap Test</i>	425
<i>Feces (Stool)</i>	425
<i>Hair</i>	428
<i>Nail Clippings</i>	428
<i>Skin Tests</i>	428
<i>Throat Swabs</i>	430
<i>Tissue Specimens</i>	431
Study and Review Questions	432
Case Studies	433
References	434
Media Menu	434

## 14

**Arterial Puncture Procedures 435**

NAACLS Entry Level Competencies	435
Key Terms	435
Objectives	435
Personnel Who Perform Arterial Puncture	436
Site-Selection Criteria	436
Arterial Puncture Sites	436
<i>The Radial Artery</i>	436
<i>The Brachial Artery</i>	437
<i>The Femoral Artery</i>	438
<i>Other Sites</i>	438
Arterial Blood Gases	438
ABG Specimen Collection	439
<i>Test Requisition</i>	439
<i>Equipment and Supplies</i>	440
<i>Patient Preparation</i>	440
<i>Radial ABG Procedure</i>	443
<i>ABG Collection From Other Sites</i>	448
Hazards and Complications of Arterial Puncture	448
<i>Arteriospasm</i>	449
<i>Artery Damage</i>	449
<i>Discomfort</i>	449
<i>Infection</i>	449
<i>Hematoma</i>	449
<i>Numbness</i>	449
<i>Thrombus Formation</i>	449
<i>Vasovagal Response</i>	449
Sampling Errors	449
<i>Air Bubbles</i>	449
<i>Delay in Analysis</i>	450
<i>Improper Mixing</i>	450
<i>Improper Syringe</i>	450
<i>Obtaining Venous Blood by Mistake</i>	450
<i>Use of Improper Anticoagulant</i>	450
<i>Use of Too Much or Too Little Heparin</i>	450
Criteria for ABG Specimen Rejection	450
Study and Review Questions	451
Case Study	452
References	452
Media Menu	452

<b>Appendix A</b>	Laboratory Tests	453
<b>Appendix B</b>	Laboratory Mathematics	461
<b>Appendix C</b>	Conversational Phrases in English and Spanish	466
<b>Appendix D</b>	Work Restrictions for Healthcare Employees	468
<b>Appendix E</b>	Answers to Study and Review Questions and Case Studies	469
<b>Appendix F</b>	Tube Guides	476

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**Glossary 480**
**Index 499**



## List of Procedures

<b>Procedure 3-1</b>	Handwashing Technique 68
<b>Procedure 3-2</b>	Cleanup Procedures for Blood and Other Body Fluid Spills 87
<b>Procedure 8-1</b>	Tourniquet Application 231
<b>Procedure 8-2</b>	Routine ETS Venipuncture 245
<b>Procedure 8-3</b>	Venipuncture of a Hand Vein Using a Butterfly and ETS Holder 253
<b>Procedure 8-4</b>	Needle-and-Syringe Venipuncture 256
<b>Procedure 9-1</b>	Performing Venipuncture Below an IV 281
<b>Procedure 9-2</b>	Steps to Follow if a Patient Starts to Faint During Venipuncture 287
<b>Procedure 10-1</b>	Fingerstick Procedure 315
<b>Procedure 10-2</b>	Heelstick Procedure 318
<b>Procedure 10-3</b>	Collection of a Capillary Blood Gas (CBG) Specimen by Heel Puncture 321
<b>Procedure 10-4</b>	Newborn Screening Blood Spot Collection 327
<b>Procedure 10-5</b>	Preparing a Blood Smear From a Capillary Puncture 329
<b>Procedure 11-1</b>	Blood Culture Specimen Collection 346
<b>Procedure 11-2</b>	GTT Procedure 354
<b>Procedure 13-1</b>	24-Hour Urine Collection Procedure 407
<b>Procedure 13-2</b>	Clean-Catch Urine Collection Procedure for Women 409
<b>Procedure 13-3</b>	Clean-Catch Urine Collection Procedure for Men 410
<b>Procedure 13-4</b>	Urinalysis Specimen Chemical Analysis 413
<b>Procedure 13-5</b>	hCG Pregnancy Test Procedure 417
<b>Procedure 13-6</b>	TB Test Administration 429
<b>Procedure 13-7</b>	Throat Culture Specimen Collection 431
<b>Procedure 14-1</b>	Modified Allen Test 442
<b>Procedure 14-2</b>	Preparing and Administering Local Anesthetic 444
<b>Procedure 14-3</b>	Radial ABG Procedure 446

# User's Guide

## Connecting Learning to Practice

Phlebotomists have a critical role within the healthcare system. At Jones & Bartlett Learning, we believe your text should not only help you understand the critical tasks associated with your chosen profession, but also prepare you to step into the role of a practicing phlebotomist. This User's Guide provides a tour of the elements of Phlebotomy Essentials to help you do just that.


### Laying the Foundation

To practice effectively, you need strong content understanding. Consistent chapter opening elements let you preview what each chapter has to offer.

**NACCLS Competencies** show you what you'll need to know on Day 1 of your first job.

**Key Terms**, listed at the beginning of each chapter and defined in the glossary, help you “talk the talk” of your profession.

**Objectives** provide a quick overview of the content covered within the chapter and what you're going to learn.




## Venipuncture Procedures

### NACCLS Entry Level Competencies

4.5 Explain the importance of timed, fasting, and STAT specimens as related to specimen integrity and patient care.	6.10 List the steps necessary to perform a venipuncture and a capillary (dermal) puncture in order.
6.00 Follow standard operating procedures to collect specimens.	6.11 Demonstrate a successful venipuncture following standard operating procedures.
6.3 Describe and demonstrate the steps in the preparation of a venipuncture site.	7.00 Demonstrate understanding of requisitioning, specimen transport, and specimen processing.
6.5 Recognize proper needle insertion and withdrawal techniques, including direction, angle, depth, and aspiration, for venipuncture.	7.1 Describe the process by which a request for a laboratory test is generated.
6.9 Describe signs and symptoms of physical problems that may occur during blood collection.	9.1 Maintain confidentiality of privileged information on individuals, according to federal regulations (e.g., HIPAA).
	9.3 Interact appropriately and professionally.

### Key Terms

 Do Matching Exercise 8-1 in the WORKBOOK to gain familiarity with these terms.

accession	cognitive impairment	MR number	preop/postop
anchor	dialysis	needle phobia	recumbent
arm/wrist/ID band	DNR/DNAR	needle sheath	reflex
ASAP	DOB	NPO	requisition
barcode	EMLA	palpate	stasis
bedside manner	fasting	patency	STAT
belonephobia	geriatric	patient ID	taut
code	hospice	patient-specific identifier	turgid

### Objectives

Upon successful completion of this chapter, the reader should be able to:

1. Demonstrate knowledge of each venipuncture step from the time the test request is received until the specimen is delivered to the lab, and define associated terminology.
2. Describe how to perform a venipuncture using evacuated tube system (ETS), syringe, or butterfly needle; list required patient and specimen identification information; describe how to handle patient ID discrepancies; and state the acceptable reasons for inability to collect a specimen.
3. Identify challenges and unique aspects associated with collecting specimens from pediatric and geriatric patients.
4. Describe why a patient would require dialysis and how it is performed, and exhibit an awareness of the type of care provided for long-term care, home care, and hospice patients.

214

## Enhancing Your Learning

Did you know that free online resources can help you be more successful? Or that boxes within the text can make your studying easier? Don't overlook the tools we've built into this book to help you graduate with high marks and a high level of confidence in your abilities!

**Key Points** highlight important concepts to help you study and ensure you carry your knowledge into the clinical setting.

**Caution Boxes** provide a heads-up about potential mistakes to help you avoid them.

**Icons** throughout the text let you know where related material in the Workbook or Exam Review can help you practice putting what you've learned to work.

**Memory Joggers** help you to learn and provide for easy recall of key tips and facts long after you've entered the workplace.

**FYI Boxes** provide interesting, relevant information and add context to the materials you're learning.

New **Misconception Alerts** clarify difficult-to-learn topics based on student data from the Jones & Bartlett Learning TestPrep.

New **Law and Ethics Boxes** highlight potential ethical and legal dilemmas phlebotomists face.



**Key Point:** The medical science and specialty practice concerned with all aspects of disease—including the characteristics, causes, and effects of disease on the structure and function of the body—is called pathology, and the medical professional trained



**CAUTION:** Fasting beyond 12 hours can cause serious health problems, such as electrolyte imbalance and heart rhythm disturbances. Consequently, fasting specimens, especially those requiring a 12-hour fast, should be collected promptly without unreasonable delay.



**Test your knowledge of proper handwashing procedure with WORKBOOK Skills Drill 3-3.**



**Memory Jogger** The word root *lip* means “fat.” To associate lipemic with fat, think “fat lip” or visualize a big fat white cloud, because fats make the specimen appear cloudy white.



**FYI:** The act of turning the hand so that the palm faces down is called pronation. The act of turning the palm to face upward is called supination.



**Misconception Alert:** When asked the following question in the Jones & Bartlett Learning TestPrep:

Why do pregnant patients have lower reference ranges for red blood cell (RBC) counts?

26% of the students incorrectly chose “The growing fetus uses up the mother’s iron reserves.” The cor-



**Law and Ethics:** Sometimes there can be signs of nerve involvement during a blood draw even though the tubes are filling with blood. When this happens, it is tempting for the phlebotomist to finish collecting the specimens. The standard of care based on CLSI venipuncture standards is to immediately terminate the venipuncture. The ethical phlebotomist must always

**Study and Review Questions** test how well you understand each chapter's major concepts.



## Study and Review Questions



See the **EXAM REVIEW** for more study questions.

1. Which of the following is the oldest and largest healthcare standards-setting body in the nation?
  - a. American Medical Association
  - b. Centers for Medicare and Medicaid Services
  - c. College of American Pathologists
  - d. The Joint Commission
2. The CLIA federal regulations are administered by
  - a. CAP.
  - b. CLSI.
  - c. CMS.
  - d. CoW.
7. Informed consent means that a
  - a. nurse has the right to perform a procedure on a patient even if the patient refuses.
  - b. patient agrees to a procedure after being told of the consequences associated with it.
  - c. patient has the right to look at all his or her medical records and test results.
  - d. phlebotomist tells the patient why the test is ordered and the meaning of the results.
8. A national organization that develops guidelines and sets standards for laboratory procedures is the
  - a. CAP.
  - b. CLIAC.
  - c. CLSI.
  - d. NAACLS.

**Media Menus** recap and highlight all of the resources available for each chapter.



## MEDIA MENU

### Online Ancillaries

- Animations and videos
- Animations:
  - Gas Exchange in Alveoli
  - Oxygen Transport
- Flashcards
- Audio Glossary

### Internet Resources


- Anatomy Arcade. [www.anatomyarcade.com](http://www.anatomyarcade.com)
- GetBodySmart.com. <http://www.getbodysmart.com/ap/site/resource/links/links.html>
- free-ed.net™, free education on the Internet. <https://waybuilder.net/free-ed>
- Human Anatomy online. <http://ect.downstate.edu/courseware/haonline/index.htm>
- National Institute of Diabetes and Digestive and Kidney Diseases. <http://www.niddk.nih.gov>

## Stepping into Success


Do you feel like you learn better when you understand not only the what, but also the why of what you're learning? We think you do. *Phlebotomy Essentials* provides many opportunities for you to step into the shoes of practicing phlebotomists and understand what wearing those shoes feels like!

**Case Studies** help you see exactly how the concept you're learning might present itself in the real world. You'll start to think like you're already in practice so you're fully ready for the workforce when you graduate.

Practicing phlebotomy means successfully performing a variety of **procedures**. Our visual, step-by-step instructions can help you get ready to do just that!



### Case Studies



See the **WORKBOOK** for more case studies.

#### Case Study 10-1. Capillary Puncture Procedure

A phlebotomist is sent to collect a CBC specimen on a five-year-old pediatric patient. The patient has an IV in the left forearm. The right arm has no palpable veins so the phlebotomist decides to perform capillary puncture on the middle finger of the right hand. This is the phlebotomist's first job, and although he is quite good at routine venipuncture, he has not performed many capillary punctures. The child is uncooperative and the mother tries to help steady the child's hand during the procedure. The phlebotomist is able to puncture the site, but the child pulls the hand away. Blood runs down the finger. The phlebotomist grabs the child's finger and tries to fill the collection device with the blood as it runs down the finger. The child continues to try to wriggle the finger free. The phlebotomist finally fills the container to the minimum level. When the specimen is tested, the platelet count is abnormally low. A slide is made and platelet clumping is observed. A new specimen is requested. Hemolysis is later observed in the specimen.

**Questions**

- How might the circumstances of collection have contributed to the platelet clumping in the specimen?

#### Case Study 10-2. Venous Blood and Microtubes

Casey is a phlebotomist in a small rural hospital. Tonight, he is working the night shift by himself. He has a headache, so he is not feeling his best. It has been a quiet evening and all his draws have been patients with easy veins. He then gets an order for STAT CBC, electrolytes, and glucose on a patient in ICU. The patient has IVs in both arms and has tiny hand veins. Casey decides to perform a syringe draw on a hand vein. The vein ruptures, and he has to discontinue the draw. There is a small amount of blood in the syringe, so he decides to put half of it in a nonadditive microtube for the electrolytes and glucose and the rest in an EDTA microtube. He is only able to fill each microtube partway. Just then he is paged for a STAT draw in the ER. He quickly finishes up with the patient, slaps labels on the microtubes, scribbles his initials on them, and heads to the lab to deliver them before proceeding to the ER.

**Questions**

- Casey forgot to put something important on the labels of the microtubes. What was it, and why is that a problem?
- What effect could his forgetfulness have when the results of the electrolytes and glucose are reported? What is the reason for your answer?
- One of the specimens is compromised even if the problem addressed by the first question had not

### Procedure 10-1 Fingerstick Procedure

**PURPOSE:** To obtain a blood specimen for patient diagnosis or monitoring from a finger puncture

**EQUIPMENT:** Nonlatex gloves, warming device (optional), antiseptic prep pad, safety finger puncture lancet, microtubes or other appropriate collection devices, gauze pads, sharps container, permanent ink pen, bandage

#### Step

**1-5.** See Chapter 8 venipuncture steps 1 through 5.

**6.** Position the patient.

**7.** Select the puncture site and warm the hand if needed.

#### Explanation/Rationale

See Chapter 8 Procedure 8-2: steps 1 through 5.

CLSI standards require the patient to be seated or reclining in an appropriate chair, or lying down.

The arm must be supported on a firm surface and the hand palm up.

Note: A young child may have to be held on the lap and restrained by a parent or guardian.

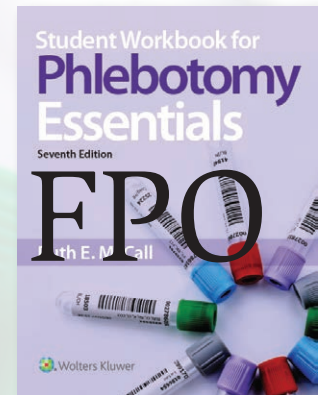
Selecting an appropriate site protects the patient from injury, allows collection of a quality specimen, and prevents spreading previous infection.

## Strengthening Your Learning

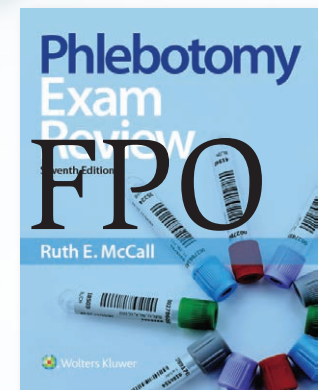
Ever feel like you're struggling to keep up in class? Make sure you're taking advantage of all of the tools available to help you own your success!

*Student Workbook for Phlebotomy Essentials* provides new tools and resources to help you supplement your text and build on your learning. Activities include:

- **Matching activities** to help you learn the terms and concepts that professional phlebotomists need to know.
- **Labeling exercises** to help you recognize important equipment, tools, and procedures.
- **Knowledge drills** to reinforce core concepts and principles discussed in the text.
- **Skills drills** to help you make the transition from the classroom to clinical practice.
- **Chapter and unit crossword puzzles** that offer a fun way to reinforce and assess your knowledge.
- **Chapter review questions** to test your comprehension as you progress through the text and build your knowledge.
- **Case studies** that let you see how your newfound knowledge and skills can be put into practice.

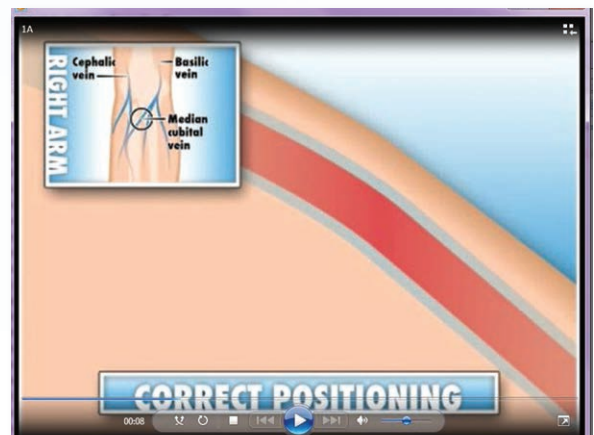


Want to sit for certification? Do you know that, on average, certified phlebotomists earn more money than those who opt not to obtain certification? If you're considering certification, then consider *Phlebotomy Exam Review*, which can help you prepare for several national exams.



*Phlebotomy Essentials, Enhanced Seventh Edition* includes additional resources for both instructors and students that are available on the book's online site. Instructors can also request access to the instructor resources from their Jones & Bartlett Learning Account Representative. These resources include:

- Videos and animations that illustrate important procedures and concepts
- Study tools, like crossword puzzles and an audio glossary, that can help you check your learning



## Get Your Customized Success Play

Ever had a study plan that was completely customized for you? Now you can have one by purchasing PrepU for *Phlebotomy Essentials Exam Review*. PrepU is an adaptive quizzing engine that is simple to use and extraordinary in what it can do to help you learn!

- **Personalized Quiz Builder:** TestPrep uses data gathered from student performance to create personalized quizzes that focus on exactly what each student needs to understand! After each quiz, PrepU adapts to continue helping students progress on their next quiz!
- **Personalized Reports:** PrepU gives students feedback about their performance—broken down by topics so students know exactly where to focus their study efforts.
- **Quick and Meaningful Remediation:** PrepU offers an Answer Key for each completed quiz including rationales for each answer with specific textbook pages to help students quickly remediate.

Take a look at these solutions at [thePoint.lww.com/McCall7e](http://thePoint.lww.com/McCall7e).

The screenshot displays the PrepU interface for monitoring class performance. At the top, there are navigation links: HI Athletic, Switch to Student View, Help Center, Log Out, Wolters Kluwer Health, Lippincott Williams & Wilkins, and Medical Assistant. Below this, the 'Manage Classes' tab is active, showing 'Question Library' and 'Assign a Quiz' options.

**Monitor your class's performance**  
Once you've created a class and your students have begun taking quizzes, you'll have access to a wealth of information through the "How's My Class Doing?" page. Each component of this page shows information on a specific aspect of student performance.

**Class Performance**  
The Class Performance section shows information on your class's Mastery Levels. The graph on the left shows the average ML reached relative to the total number of questions answered so you can see overall progression. The histogram to the right shows the number of students at each overall ML.

The graph shows 'Mastery Level vs. # of Questions Answered' with a line graph showing an upward trend. A callout box indicates 'Class overall Mastery Level: 4.8'. The histogram shows 'Mastery Level' on the x-axis (1-8) and 'Number of students' on the y-axis (0-10).

**Strengths & Weaknesses**  
The Strengths & Weaknesses section shows the top three chapters in which students are doing well, and the three chapters in which your students are struggling the most.

**Strong chapters:**

Chapter	Mastery
Chapter 55: Assessment of Integumentary Function	Class Mastery Level: 8.1

**Blood gas specimen rejection criteria include:**

1% ☐ a) improper labeling or missing label.  
 0% ☐ b) inadequate volume of the specimen.  
 0% ☐ c) visible hemolysis of the specimen.  
 99% ☒ d) all of the above.

**Explanation: Why:** Blood gas rejection criteria include improper or missing labeling, inad... (more)

**Reference:**  
 McCall, R.E., and Tankersley, C.M. *Phlebotomy Essentials*, 5th ed., Baltimore: Lippincott Williams & Wilkins, 2012, Chapter 14: Arterial Puncture Procedures, p. 475.

A difficulty scale is shown on the right, ranging from 1 to 100, with a thermometer icon and the word 'Difficulty'.

