

Yorkshire & the Humber Regional Transfusion Practitioner Group

REGIONAL TRANSFUSION COMPETENCY ASSESSMENT CRITERIA MATRIX

In 2016 the National Blood Transfusion Committee (NBTC) released updated Requirements for Training and Assessment in Transfusion superseding the disbanded NPSA (SPN 14), in collaboration with other key stakeholders. As you know, many Trusts adapted these competencies, which has led to 'differences' in the assessment criteria nationally and in particular the Yorkshire & Humber Region. Unfortunately, this has resulted in a number of staff having to be reassessed if they move from one Trust to another as the assessment criteria may differ. For example; in Leeds, staff are assessed on their knowledge in how to 'record receipt of blood', whereas in Calderdale, they don't assess this criteria. Therefore, if staff move from Calderdale to Leeds, they will need to be trained and assessed in recording 'receipt of blood'.

As a means to reduce repetition and aid transferability of these assessments, the Yorkshire & Humber Regional Transfusion Practitioner Group has mapped each Trust's transfusion competency assessment criteria, against National Standards: Skills for Health documentation. From this exercise, the group developed a matrix for each of the transfusion competencies. The matrix can be used by the new employer, to cross reference assessment criteria used in another Trust, against their own and so highlight any differences (if any). This then means that the new employee need only be assessed in the areas highlighted as different. Therefore eliminating the need to reassess staff in the whole transfusion competence, if at all

REGIONAL MATRIX - OBTAINING A PERIPHERAL VENOUS BLOOD SAMPLE

Assessment and criteria for obtaining a peripheral venous blood sample		Airedale	Barnsley	Bradford	Calderdale & Huddersfield	Doncaster & Bassetlaw	Harrogate	Hull	Leeds	Mid Yorkshire	North Lincolnshire & Goole	Rotherham	Scarborough	Sheffield	York
1	Did the member of staff check each of the following on the request form:														
	a) full name?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) date of birth?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) hospital, NHS or A/E number?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	d) Did the member of staff sign and write their contact details to show who had taken the sample?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	e) Did the member of staff print their name to show who had taken the blood sample?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

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2	Did the member of staff bleed only one patient at a time?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
3a	Patient identification for <u>conscious patients</u> Did the member of staff:														
	i) ask the patient to state their full name?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	ii) ask the patient to state their date of birth?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	iii) check patient's response matched those details on the wristband or other attached identifier?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	iv) check patient's wristband details including the unique numeric identifier matched those on the transfusion request form?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
3b	Patient identification check of unconscious patient Did the member of staff check details on the wristband or other attached identifier:														
	i) for full name?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	ii) date of birth?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	iii) hospital number?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	iv) with the prescription or transfusion request form?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
3c	Can the member of staff describe the Trust's policy for identifying unconscious patients?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	✓
4	Personal checks – did the member of staff:														
	a) wash their hands?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) use personal protective equipment where appropriate?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

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5	Taking the sample: Did the member of staff														
	a) prepare the skin properly?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) use the tourniquet appropriately?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) minimise discomfort for the patient?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	d) take blood appropriately if a transfusion is being carried out alongside other sampling procedures?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	e) monitor the patient's responses?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	f) remove needles using an appropriate technique?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	g) apply a dressing at the end of the procedure?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	If the last two questions are not applicable to the patient from whom the sample is being taken, can the member of staff say what they would do in these circumstances?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
6	Labelling the sample - Did the member of staff label the venous blood sample:														
	as soon as it was taken?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	with full name?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	• date of birth?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	• hospital number?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	• gender?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	• date?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	• the member of staff's signature and contact details?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

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7	Packaging and documentation - Did the member of staff:														
	a) take the sample to the correct collection point?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) document why the sample had been taken?	✓	✓	✓	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) document when the sample had been taken?	✓	✓	✓	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	✓
	d) document who took the sample?	✓	✓	✓	✓	x	✓	✓	✓	✓	✓	x	✓	✓	✓
8	Knowledge assessment														
	Did the candidate know the importance of:														
	a) using open ended questions for identifying patient?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) not using pre-labelled bottles?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) the correct procedure if the patient is unconscious or unable to give verbal identification?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	d) the risks created if more than one patient is bled at a time?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	e) correct action to take if the information identifying the patient is missing?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
9	Has this document been incorporated into your Trust's Venepuncture competency assessment (Y/N)?	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y

Key: ✓ = applicable ✓e = electronic x = No or N/A

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REGIONAL MATRIX - ORGANISING THE RECEIPT OF BLOOD/BLOOD PRODUCTS FOR TRANSFUSION

Assessment and criteria for organising the receipt of blood/blood products for transfusion		Airedale	Barnsley	Bradford	Calderdale & Huddersfield	Doncaster & Bassetlaw	Harrogate	Hull	Leeds	Mid Yorkshire	North Lincolnshire & Goole	Rotherham	Scarborough	Sheffield	York
1	Did the member of staff confirm that the blood/blood product for transfusion is ready for collection?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	X	✓
2a Patient identification check for <u>conscious patients</u> (NB not applicable for porters)															
Did the member of staff ask the patient to state their:															
i) full name?		✓	X	✓	✓	✓	✓	✓	X	✓	✓	X	X	X	X
ii) date of birth?		✓	X	✓	✓	✓	✓	✓	X	✓	✓	X	X	X	X
2b Did the member of staff match?															
i) the details provided with the information on the blood transfusion collection slip or prescription (i.e. patient documentation)?		✓	X	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	X	✓
ii) the information provided by the patient to information on the wristband or other attached identifier?		✓	X	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	X	✓
3 Patient identification check for <u>unconscious patients</u> or patients unable to verbally respond (NB not applicable for porters)															
Did the member of staff check:															
the details on the wristband or other attached identifier were correct?		✓	X	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	X	X
the <u>minimum</u> dataset information:		✓	X	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	X	X
• full name?		✓	X	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	X	X
• date of birth?		✓	X	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	X	X
• hospital number or other identification number?		✓	X	✓	✓	✓	✓	✓	X	✓	✓	✓	✓	X	X

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Assessment and criteria for organising the receipt of blood/blood products for transfusion		Airedale	Barnsley	Bradford	Calderdale & Huddersfield	Doncaster & Bassetlaw	Harrogate	Hull	Leeds	Mid Yorkshire	North Lincolnshire & Goole	Rotherham	Scarborough	Sheffield	York
4	Blood transfusion collection slip/prescription: Did the member of staff understand what information should be written on the blood transfusion data collection slip/prescription by describing that it should contain:														
	a) the patient's full name?	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	✓	✓	✓	✓
	b) date of birth?	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	✓	✓	✓	✓
	c) hospital or other identification number?	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	✓	✓	✓	✓
	d) signature of the person collecting the blood	✓	✓	✓	x	x	✓	✓	x	✓	✓	✓	✓	x	✓e
	e) contact details of the person who is collecting the blood?	x	✓	✓	x	x	✓	✓	x	x	x	✓	✓	x	✓e
5	Did the member of staff identify an appropriate person to collect the blood/blood products for transfusion and ensure:														
	a) there was clear communication about which blood/blood products to collect?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) there was verbal confirmation on where the blood/blood product should be collected from?	✓	x	✓	✓	✓	x	✓	✓	✓	x	✓	x	✓	✓
	c) there was verbal instruction on the procedure to be carried out at the collection point?	x	x	x	✓	✓	x	✓	x	x	x	x	x	x	✓

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6	Receipt of blood/blood products														
	Did the member of staff respond promptly to the delivery of blood/blood products by:														
	a) checking that the details on the delivered blood/blood products match the patient documentation (i.e. blood transfusion collection slip or prescription)?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	x	✓
	b) ensuring that receipt of the blood was documented with their signature, time and date of receipt?	✓	x	✓	x	✓	✓	✓	✓	✓	✓	✓	✓	x	✓e
7	<u>Knowledge assessment:</u>														
	Does the member of staff know and understand the importance of:														
	a) using open-ended questions for patient identification?	✓	x	✓	✓	✓	✓	✓	x	x	✓	✓	✓	x	✓
	b) why information on the blood collection slip must be complete?	✓	x	✓	x	✓	✓	✓	x	x	✓	✓	✓	✓	✓
	c) the potential risks in the blood component collection process?	✓	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	✓	✓	✓
	d) why information should not be cross-checked against the blood compatibility form attached to the blood component?	x	x	✓	x	✓	x	✓	x	x	x	✓	✓	x	✓

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REGIONAL MATRIX - COLLECTING BLOOD/BLOOD PRODUCTS

Assessment and criteria for collecting blood/blood products		Airedale	Barnsley	Bradford	Calderdale & Huddersfield	Doncaster & Bassetlaw	Harrogate	Hull	Leeds	Mid Yorkshire	North Lincolnshire & Goole	Rotherham	Scarborough	Sheffield	York
1	Did the member of staff demonstrate effective use of health and safety measures by:														
	a) adhering to Trust Infection Control policy.	✓	x	✓	x	✓	✓	✓	x	x	x	x	✓	x	x
	b) adhering to local policy specific to the situation.	x	✓	✓	x	✓	✓	✓	x	✓	✓	✓	✓	✓	✓
2	Patient identification check for <u>conscious patients</u> Did the member of staff:														
	a) collect the appropriate documentation for blood collection from the member of staff requesting blood (e.g. prescription chart)?	x	✓	✓	✓	✓	✓	✓	x	x	x	✓	✓	✓	✓
	b) check the following details of the patient: • full name? • date of birth?	x	x	x	x	✓	✓	✓	x	✓	x	✓	✓	x	✓
	c) for inpatients, match the information provided by the patients with information on the wristband?	x	x	x	x	✓	✓	✓	x	x	x	✓	✓	x	✓
3	Patient identification check for <u>unconscious patients</u> or patients unable to verbally respond: Did the member of staff check:														
	the details on the wristband and at least their: • full name? • date of birth? • hospital number?	x	x	x	x	✓	✓	✓	x	✓	x	✓	✓	x	x

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Assessment and criteria for collecting blood/blood products		Airedale	Barnsley	Bradford	Calderdale & Huddersfield	Doncaster & Bassetlaw	Harrogate	Hull	Leeds	Mid Yorkshire	North Lincolnshire & Goole	Rotherham	Scarborough	Sheffield	York
4	Blood Transfusion collection documentation:														
	Did the member of staff understand the data that should be written on the blood transfusion collection documentation by describing that it should contain:	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	<ul style="list-style-type: none"> the patients full name? date of birth? hospital or other identification number? 														
5	Matching the information on the blood product to the minimum dataset information on the blood collection documentation (e.g. prescription chart).														
	Did the member of staff correctly check:	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	<ul style="list-style-type: none"> The patients full name? Date of birth? Hospital number? Gender? 														
6	Documentation - Did the member of staff correctly document the removal of blood from the fridge by:														
	a) Recording in the appropriate documentation, the date and time the blood is removed from the fridge?	✓	✓e	✓e	✓	✓e	✓	✓	✓e	✓	✓	✓e	✓	✓	✓e
	b) Writing their signature and contact information in the appropriate place?	✓ *signature only	✓e	✓e	✓	✓e	✓	✓	✓e	✓	✓	✓e	✓	✓	✓e

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7	Transportation and handover of blood products - Did the member of staff:														
	a) if appropriate ensure the correct equipment is used to transport the blood correctly?	x	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) transport the blood product immediately to the clinical area?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) not leave the blood unattended at any point?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	d) hand the blood product over to an appropriate member of staff immediately?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	e) ensure that receipt of the blood was recorded?	✓	x	✓e	x	✓	✓	✓	✓e	✓	✓	✓	✓	x	✓e
8	<u>Knowledge Assessment.</u> Did the candidate know and understand the importance of:														
	a) using open-ended questions for patient identification?	x	x	✓	x	✓	✓	✓	x	x	✓	x	✓	x	x
	b) why information on the blood collection documentation must be complete?	✓	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	✓	✓	✓
	c) the potential risks in the blood product collection process?	✓	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	✓	✓	✓
	d) why information should not be cross-checked against the blood compatibility form attached to the blood product?	x	x	✓	x	✓	✓	✓	x	x	x	✓	✓	x	✓
	e) not carrying clear blood products in a cool box?	✓	x	x	x	✓	x	✓	✓	x	✓	✓	✓	x	✓

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REGIONAL MATRIX – PREPARING TO ADMINISTER BLOOD BLOOD/PRODUCTS AND ADMINISTERING A TRANSFUSION OF BLOOD/BLOOD PRODUCTS

Assessment and criteria for preparing to administer blood blood/products and administering a transfusion of blood/blood products		Airedale	Barnsley	Bradford	Calderdale & Huddersfield	Doncaster & Bassetlaw	Harrogate	Hull	Leeds	Mid Yorkshire	North Lincolnshire & Goole	Rotherham	Scarborough	Sheffield	York
1	Did the member of staff carry out the four types of pre-transfusion checks correctly:														
	a) personal: clean hands, wear personal protective equipment and adhere to infection control guidelines at all times	✓	✓	✓	✓	✓	x	✓	✓	x	x	✓	✓	x	✓
	b) equipment: check that all equipment is clean and available (i.e. prescription chart, observation chart, giving set, disposable bags and a trolley)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) baseline assessment of the patient; check venous access has been obtained prior to blood being collected from the fridge; read through the prescription; and check that the patient understands they are going to receive a transfusion,	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	d) blood component: check the quality of the blood product, expiry dates, and any special transfusion requirements	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2	Patient identification for the <u>conscious patient</u>														
	Did the member of staff ask the patient to state their:														
	a) full name?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) date of birth?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) did the member of staff check the details on the wristband or other attached identifier were correct?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

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Assessment and criteria for preparing to administer blood blood/products and administering a transfusion of blood/blood products		Airedale	Barnsley	Bradford	Calderdale & Huddersfield	Doncaster & Bassetlaw	Harrogate	Hull	Leeds	Mid Yorkshire	North Lincolnshire & Goole	Rotherham	Scarborough	Sheffield	York
3	Patient identification check for <u>unconscious patients</u> or patients unable to verbally respond:														
	Did the member of staff check:														
	a) the details on the wristband or other attached identifier and at least their: <ul style="list-style-type: none"> full name? date of birth? hospital number? 	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) the patient information on the blood or blood product against the wristband details?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
4	Did the member of staff record the patient's vital signs?														
	a) blood pressure?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) temperature?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) pulse rate?	✓ *+RR/ NEWS	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
5a	Administering the blood transfusion														
	Did the member of staff ensure the blood transfusion was:														
	i) completed within four hours of it leaving the fridge, OR	✓	✓	✓	✓	✓	✓	x	✓	x	✓	✓	✓	✓	✓
	ii) within 30 minutes for platelets?	✓	✓	✓	✓	✓	✓	✓	✓	x	✓	✓	x	x	✓
5b	Did the member of staff:														
	i) record the patient's vital signs prior to starting the transfusion?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	ii) monitor the patient's vital signs 15 minutes after starting the transfusion?	✓ *+Tx reaction	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	iii) dispose of equipment safely?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	iv) monitor the patient's vital signs	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

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	on completion of the blood transfusion?														
Assessment and criteria for preparing to administer blood blood/products and administering a transfusion of blood/blood products		Airedale	Barnsley	Bradford	Calderdale & Huddersfield	Doncaster & Bassetlaw	Harrogate	Hull	Leeds	Mid Yorkshire	North Lincolnshire & Goole	Rotherham	Scarborough	Sheffield	York
6	Documentation														
	Did the member of staff record the following information in the patient's notes:														
	a) date?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) start time?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) stop time of the transfusion?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	d) did the member of staff complete the traceability documentation in accordance with national law?	✓	✓	✓e	✓	✓	✓	✓	✓e	✓	✓e	✓	✓e	✓	✓e
7	Knowledge assessment:														
	Does the member of staff know and understand the importance of:														
	a) using open-ended questions for patient identification?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	b) the timescales for administering blood and/or blood product safely after it had been collected from the fridge?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	c) correct procedure if unconscious patient or unable to give verbal identification?	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
	d) the risks associated with checking the blood compatibility form against the blood product instead of the information on the wristband?	✓	x	✓	x	✓	✓	✓	✓	x	x	✓	✓	x	✓
	e) monitoring the patient's vital signs throughout the transfusion process?	✓	✓ ESR	✓	✓ ESR	✓	✓	✓	✓ ESR	x ESR	✓	✓	✓	✓	✓

Key: ✓ = applicable ✓e = electronic x = No or N/A ESR = Information available on ESR for this Trust for transferability of competence

Author: Yorkshire and Humber Regional Transfusion Practitioner Group
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