SWRTC Obtaining a Venous Blood Sample competency

Obtaining a pre-transfusion venous blood sample assessment

Candidate name:	Assessor name:
Job title:	Job title:
Signed:	Signed:
Trust/organisation:	Date of assessment:

PASS	FAIL
The candidate has passed an assessment of competence to correctly identify a patient and label a pre-transfusion venous blood sample obtained from them and the accompanying request form. It is the candiate's responsibility to ensure they apply these standards to every pre-transfusion sample they obtain.	

► Candidate has passed local assessment for competence in venepuncture: Y / N ◄

Observed assessment (to be carried out in the clinical area)

* Core identifiers: first name, last name, date of birth, hospital/NHS number *

Action	<Circle Y or N to indicate whether or not action was performed>
1. Checking the transfusion request form	
Did the candidate check to see all core identifiers are on the request form	Y / N
Did the candidate check to see patient's gender is on the request form	Y / N
Did the candidate check to see the requester's name and contact details are on the form	Y / N
2. Identification of the patient	
a) Conscious patient:	
Did the candidate ask the patient to state their first name, last name, and date of birth	Y / N
Did the candidate check these match those on the patient's wristband/risk assessed equivalent	Y / N
Did the candidate check all core identifiers match those on the request form	Y / N
or	
b) Unconscious patient:	
Did the candidate check all core identifiers on the patients' wristband/risk assessed equivalent match those on the request form	Y / N
or	
c) Outpatient:	
Did the candidate ask the patient (or parent/carer if the patient is unable to respond) to state their first name, last name, and date of birth	Y / N
Did the candidate check these match those on the request form	Y / N
3. Taking the venous blood sample	
Did the candidate take and label sample from only one patient at a time	Y / N
4. Labelling the venous blood sample	
Did the candidate bleed and label the sample at the patient's side in one continous, un-interrupted process.	Y / N
Was the sample labelled by hand (unless using 'on demand' labels printed at the patient side at the time of phlebotomy).	Y / N
Did this include all core identifiers	Y / N
Did this include date and time sample was taken	Y / N
Did this include identity of the sample taker	Y / N
5. Completing the transfusion request form	
Did the candidate write on the request form after the sample was taken:	
a) sign and print their name and contact details	a) Y / N
b) date and time sample was taken	b) Y / N
6. Dispatching the sample	
Did the candidate take the sample and request form to the correct collection point, or arrange transport to the laboratory.	Y / N

The candidate should be asked to explain what they are doing when it is not an observable action being assessed (such as point 1 above)

All of the above must be achieved in this order to pass the assessment

Knowledge assessment

General
Why is it important to correctly identify the patient – what are the consequences of not doing so
What factors can lead to misidentification of patients
Completing/checking the transfusion request form
What patient details must be on the transfusion request form as a minimum
Why is it important that all of these details are complete and accurate on the request form
What are the risks if the details are wrong (incomplete or inaccurate)
Why is it important that contact details of the requester are on the form
Identifying the patient
What is positive patient identification (PPI)?
Why is it important to use open questions when checking patient's identity (i.e. using PPI)
How should you check the identity of a conscious patient
How should you check the identity of a patient who is unconscious, incapable or unable to verbally identify themselves
What should you do if patient identification information is incorrect or missing
What is the local policy for identifying unconscious, and unknown patients
Labelling the sample tube
Why must you only bleed and label the sample for only one patient at a time
Who must label the blood sample tube, when and where
Why
How must the blood sample tube be labelled
What details are required on the blood sample tube
When should you pre-label the tube in advance of taking a pre-transfusion venous blood sample
Why

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Action	<Circle Y or N to indicate whether or not action was performed>
1. Checking the transfusion request form	
Did the candidate check to see all **core identifiers** are on the request form	Y / N
Did the candidate check to see patient's gender is on the request form	Y / N
Did the candidate check to see the requester's name and contact details are on the form	Y / N
2. Identification of the patient	
a) Conscious patient:	
Did the candidate ask the patient to state their first name, last name, and date of birth	Y / N
Did the candidate check these match those on the patient's wristband/risk assessed equivalent	Y / N
Did the candidate check all **core identifiers** match those on the request form	Y / N
---------- *or* ----------	----------
b) Unconscious patient:	
Did the candidate check all **core identifiers** on the patients' wristband/risk assessed equivalent match those on the request form	Y / N
---------- *or* ----------	----------
c) Outpatient:	
Did the candidate ask the patient (or parent/carer if the patient is unable to respond) to state their first name, last name, and date of birth	Y / N
Did the candidate check these match those on the request form	Y / N
3. Taking the venous blood sample	
Did the candidate take and label sample from only one patient at a time	Y / N
4. Labelling the venous blood sample	
Did the candidate bleed and label the sample at the patient's side in one continous, un-interrupted process.	Y / N
Was the sample labelled by hand (unless using 'on demand' labels printed at the patient side at the time of phlebotomy).	Y / N
Did this include all **core identifiers**	Y / N
Did this include date and time sample was taken	Y / N
Did this include identity of the sample taker	Y / N
5. Completing the transfusion request form	
Did the candidate write on the request form <u>after</u> the sample was taken:	
a) sign and print their name and contact details	a) Y / N
b) date and time sample was taken	b) Y / N
6. Dispatching the sample	
Did the candidate take the sample and request form to the correct collection point, or arrange transport to the laboratory.	Y / N

The candidate should be asked to explain what they are doing when it is not an observable action being assessed (such as point 1 above)

<u>All</u> of the above must be achieved in this order to pass the assessment

Knowledge assessment

General

Why is it important to correctly identify the patient – what are the consequences of not doing so.
To make sure you bleed the correct patient - not doing so could lead to the wrong patient getting the wrong blood, and having a fatal ABO incompatible blood transfusion

What can lead to misidentification of patients for blood sampling
- *Omitting/curtailing full and correct patient checks*
- *Poor written and verbal communication*
- *Time pressure, high workload*
- *Distractions/interruptions during the process*

Completing/checking the transfusion request form

What patient details must be on the transfusion request form as a minimum
- *All Core Identifiers*
- *Gender (BCSH 2009)*

Why is it important that all of these details are complete and accurate on the request form.
- *To ensure the right patient is bled (as there may be patients with the same/similar name in the clinical area)*
- *Gender is important for blood component selection*

What are the risks if the details are wrong (incomplete or inaccurate)
- *May result in wrong patient being bled ('wrong blood in tube')*
- *Will result in the sample being discarded under laboratory 'zero tolerance' policies*
- *Could lead to a delay in provision of blood component*

Why is it important that contact details of the requester are on the form
- *So the laboratory can contact the requester should they require clarification of any of the clinical information*
- *If the sample is rejected the requester will need to be contacted to organise a repeat sample*

Identifying the patient

What is positive patient identification (PPI)?
- *Asking the patient to state their details; it is <u>not</u> asking them to confirm details that are read to them*

Why is it important to use <u>open</u> questions when checking patient's identity (i.e. using PPI)
- *Patients who are confused, don't understand, or miss-hear may agree to things that are said to them, regardless of whether it is correct or not*

How should you check the identity of a conscious patient
- *Ask the patient to state their first name, last name and date of birth*
- *Check these match the patient's wristband/risk assessed equivalent and request form*
- *Check <u>all</u> the core identifiers on the patient's wristband/risk assessed equivalent match the request form*

How should you check the identity of a patient who is unconscious, incapable or unable to verbally identify themselves
- *Check <u>all</u> the core identifiers on the patient's wristband/risk assessed equivalent match the request form*

What should you do if patient identification information is incorrect or missing
- *Clarify/rectify the patient identification issue, have a new request form generated if needed, and ensure inpatient has a correct identification band on before proceeding to taking a pre-transfusion blood sample*

What is the local policy for identifying unconscious, and unknown patients?

Labelling the sample tube

Why must you only bleed and label the sample for only one patient at a time
- *Sample A could be labelled with patient B's details*

Who must label the blood sample tube, when and where.
- *The sample taker, immediately after the sample has been taken, at the patients side*

Why
- *Someone else to labelling, labelling at a later time, or labelling away from the patient are all chance for the wrong patient details to be used*

How must the blood sample tube be labelled
- *Handwritten – printed labels must not be used unless generated at the patient's side with a label printing machine validated for producing pre-transfusion blood sample tube labels*

What details are required on the blood sample tube
- *All Core Identifiers*
- *Date and time of sample*
- *Sample taker's identity*

When should you pre-label the tube in advance of taking a pre-transfusion venous blood sample
- *NEVER*

Why
- *A pre-labelled sample tube could be used for a different patient*