



Yorkshire and the Humber Regional Transfusion Committee

Yorkshire and the Humber Postgraduate Deanery

Step by Step Guide: How to record achievement of venepuncture & blood transfusion competency assessments on Electronic Staff Record (ESR)

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Transfusion Practitioner Group

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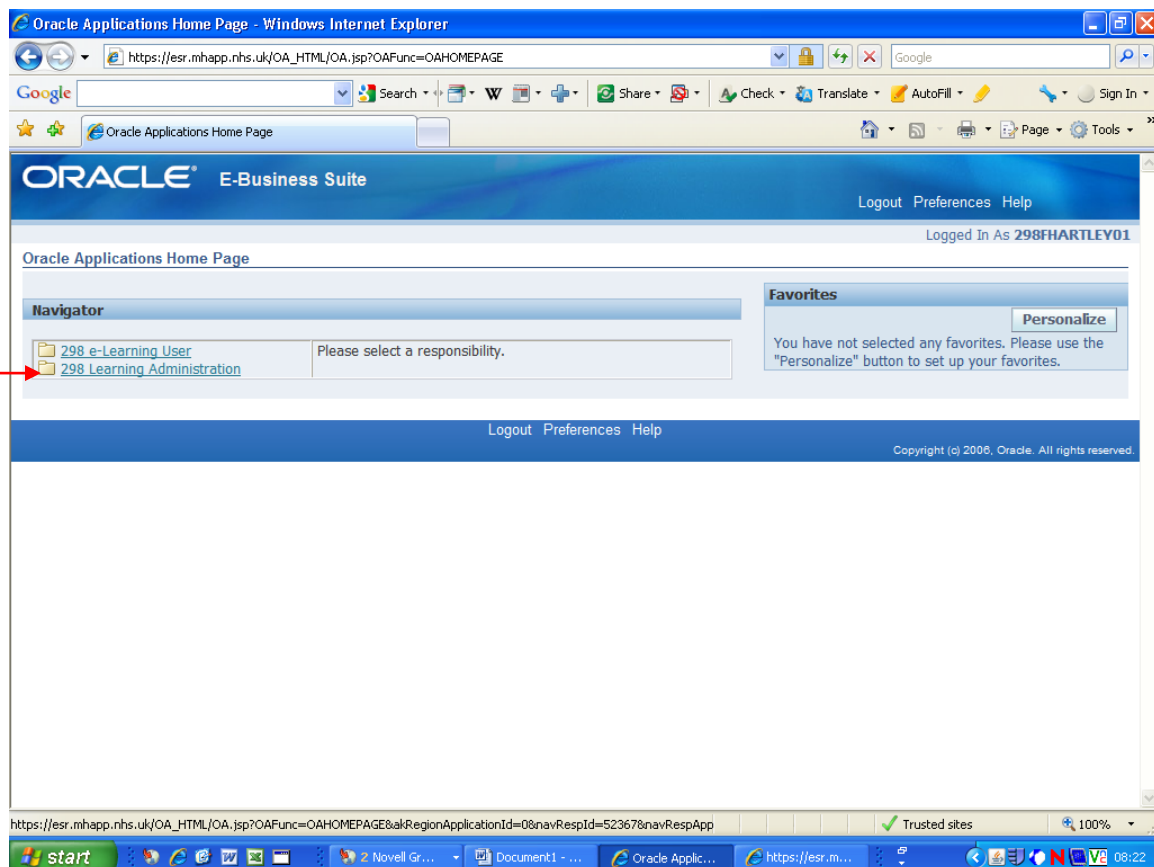
This guide illustrates how to electronically record an individual's achievement of competency assessment in transfusion related topics relevant to NBTC (National Blood Transfusion Committee) Requirements for Training and Assessment in Transfusion (2016) by using handy shortcuts to find the relevant competency assessment ESR code.

Entering data exactly as shown below will ensure an individual's staff record is 'transferable' across the Yorkshire & Humber region and help to prevent unnecessary re-assessment of clinical staff when they move Trusts.

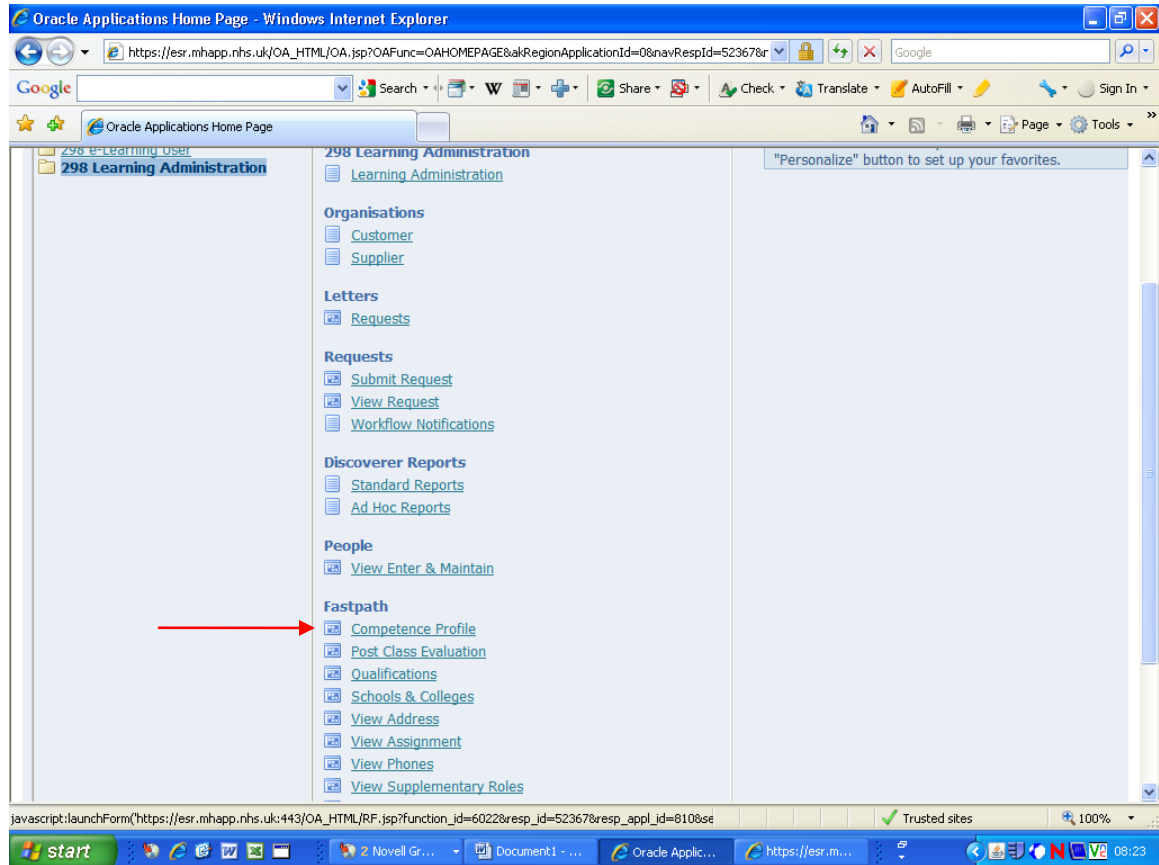
NB: Once data has been correctly entered, it will then be possible to 'run' a full 'NHSLA litigation report' using the relevant competency assessment ESR codes, to establish local Trust compliance with NBTC Requirements for Training and Assessment in Transfusion (2016) & all of the competency assessments.

Step by step guide:

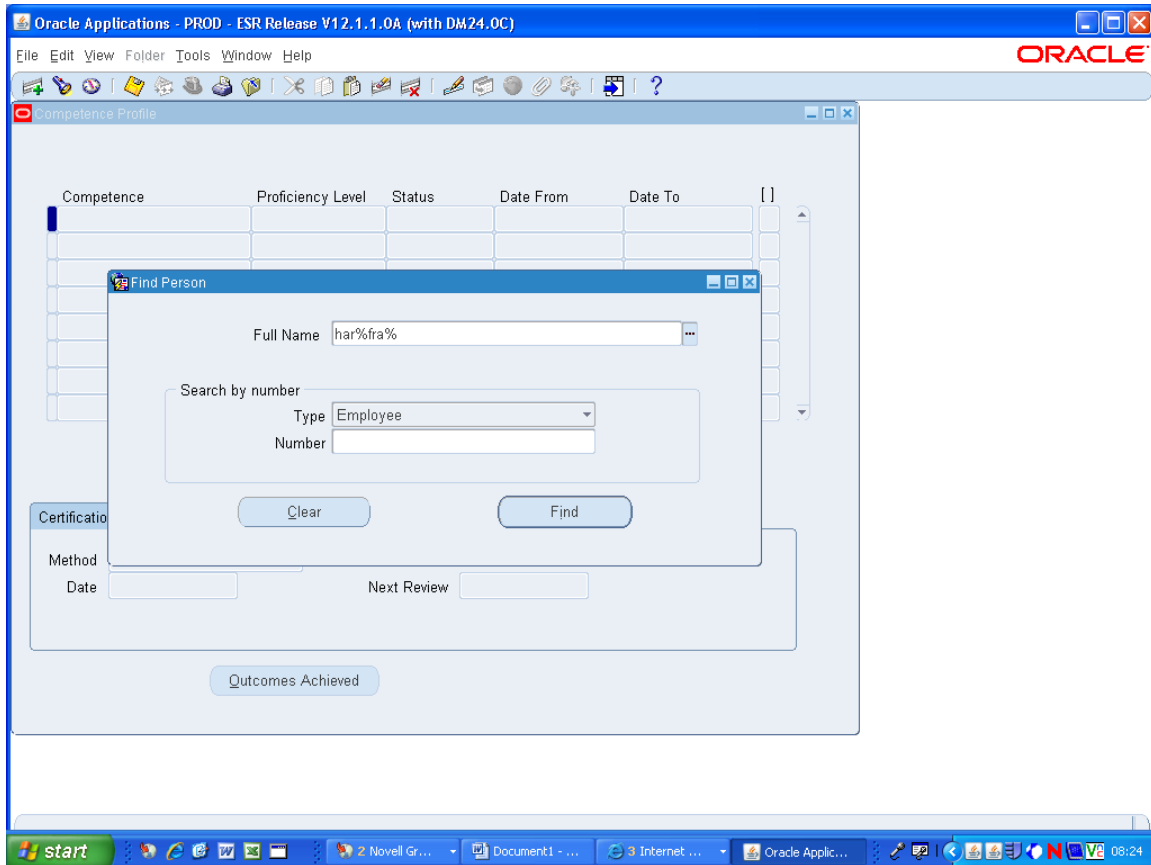
1. Open Oracle/ESR and click on 'Learning Administration'



2. In column 2, under Fastpath – click on ‘Competence Profile’



3. The 'Find Person' box will appear. Enter the name of the person you want to enter using the first 3 letters of the last name, followed by %, then the first 3 letters of the first name followed by %, e.g. for Frances Hartley, enter har%fra%. Then click on 'Find' or press 'Enter'.



4. If a selection of names comes up, double click on the correct one and a list of all their training attended / competency assessments will appear.

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File Edit View Folder Tools Window Help

Competence Profile(Hartley, Miss Frances Elizabeth (Frances))

☐ Current Competencies

Competence	Proficiency Level	Status	Date From	Date To
298 MAND Safeguarding Yulr	1 - Attended Course	Achieved	11-AUG-2009	10-AUG-2012
298 MAND Safer Blood Trans	1 - Attended Course	Achieved	25-JUN-2010	24-JUN-2013
NHS MAND Safeguarding Adi		Achieved	11-AUG-2009	10-AUG-2012
NHS NOS Clinical Health Ski	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS NOS General Health Ca	1 - Attained	Achieved	29-OCT-2010	28-OCT-2013
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013

Source of Proficiency Rating

Certification Unit Standard Qualifications Framework Details

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5. Scroll down the page until you find a blank line. If there isn't a blank line, click on the last line to highlight it and then click on the 'new' line icon (top left).

New line icon

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File Edit View Folder Tools Window Help

Competence Profile(Hartley, Miss Frances Elizabeth (Frances))

☐ Current Competencies

Competence	Proficiency Level	Status	Date From	Date To	
298 MAND Safeguarding Vuln	1 - Attended Course	Achieved	11-AUG-2009	10-AUG-2012	
298 MAND Safer Blood Trans	1 - Attended Course	Achieved	25-JUN-2010	24-JUN-2013	
NHS MAND Safeguarding Adi		Achieved	11-AUG-2009	10-AUG-2012	
NHS NOS Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	
NHS NOS General Health Ca	1 - Attained	Achieved	29-OCT-2010	28-OCT-2013	
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	

Source of Proficiency Rating

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6. In the new line, click on the '...' in the first cell to bring up the 'Competencies – Find' box

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File Edit View Folder Tools Window Help

Competence Profile(Hartley, Miss Frances Elizabeth (Frances))

☐ Current Competencies

Competence	Proficiency Level	Status	Date From	Date To	
298(MAND)Safer Blood Trans	1 - Attended Course	Achieved	25-JUN-2010	24-JUN-2013	
NHS(MAND)Safeguarding Ad		Achieved	11-AUG-2009	10-AUG-2012	
NHS(INOS)Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	
NHS(INOS)General Health Ca	1 - Attained	Achieved	29-OCT-2010	28-OCT-2013	
NHS(INWC)Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	
NHS(INWC)Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	
NHS(INWC)Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	
...					

Source of Proficiency Rating

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Copy Competencies Outcomes Achieved

7. In the 'Competencies' box, click in the 'Find' cell and type the National Occupational Standard code for the competency assessment achieved – prefixed with %, i.e.

%CHS 132 (for Obtaining a Venous Blood Sample)
%GEN 57 (for Collecting Blood)
%CHS 101 (for Organising Receipt of Blood)
%CHS 102 (for Preparing to Administer Blood)
%CHS 103 (for Administering Blood)

NB: most NHS Trusts will have combined 'preparing to administer blood' and 'administering blood' for their competency assessments, therefore if this has been achieved, you will need to add both CHS 102 **and** CHS 103 to indicate competence in both parts of the one assessment.

Then click on 'Find' or press enter

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File Edit View Folder Tools Window Help

Competencies

Enter a partial value to limit the list, % to see all values.

Warning: Entering % to see all values may take a very long time. Entering criteria that can be used to reduce the list may be significantly faster.

Find: %chs132

Name

Date To: 24-JUN-2013

Method

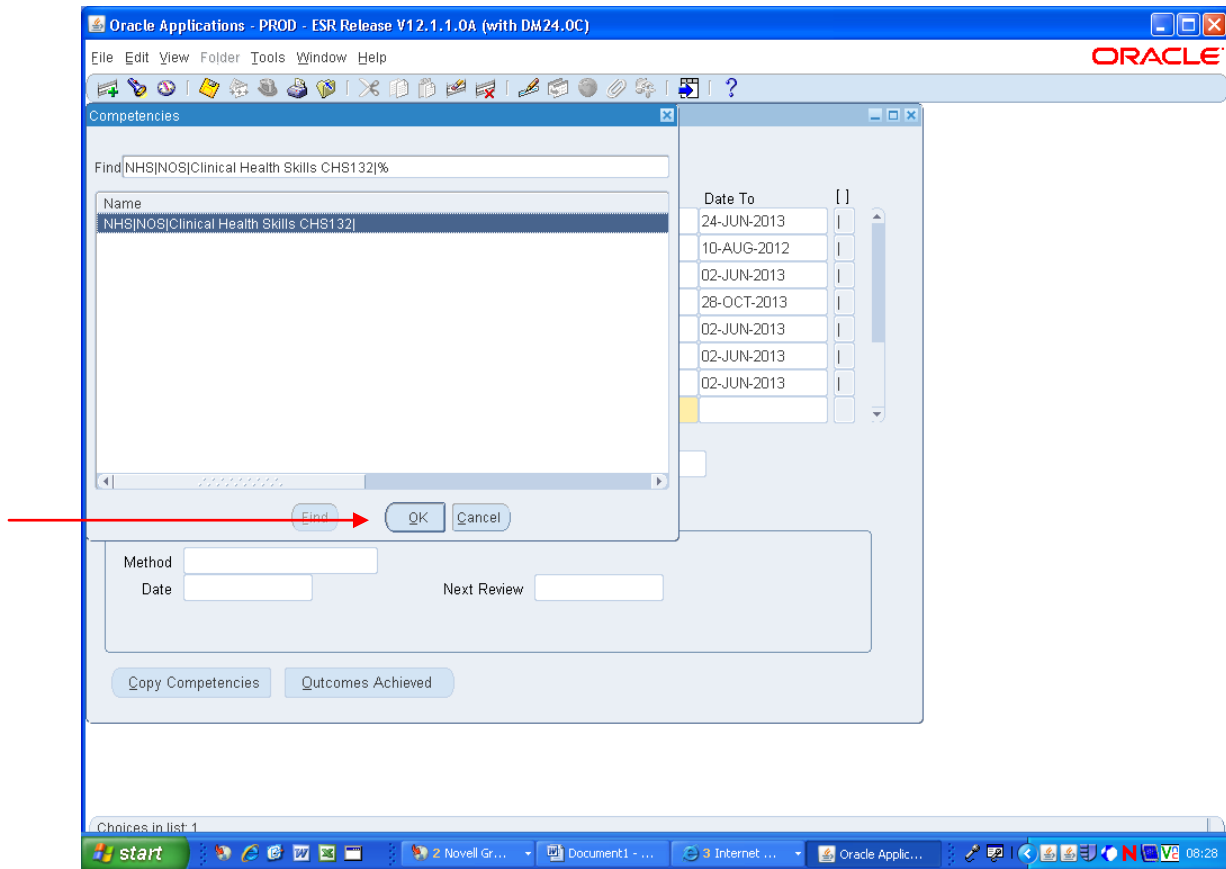
Date

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Copy Competencies Outcomes Achieved

Alternatively, the 'full' National Occupational Standard (NOS) or National Workforce Competence (NWC) codes can be used to find the relevant title – see **appendix 1** for information.

8. Click 'OK' when the full title of the competency assessment code appears



9. In the second cell, click on the '...' for 'Attained' to be entered in the cell

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File Edit View Folder Tools Window Help

Competence Profile(Hartley, Miss Frances Elizabeth (Frances))

☐ Current Competencies

Competence	Proficiency Level	Status	Date From	Date To
298 MAND Safer Blood Trans	1 - Attended Course	Achieved	25-JUN-2010	24-JUN-2013
NHS MAND Safeguarding Ad		Achieved	11-AUG-2009	10-AUG-2012
NHS NOS Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS NOS General Health Ca	1 - Attained	Achieved	29-OCT-2010	28-OCT-2013
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS NOS Clinical Health Sk		...		

Source of Proficiency Rating

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10. Click in the fourth cell and enter the date the competency assessment was achieved in the following format: 31-OCT-2011. (NB the third cells remains blank)

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File Edit View Folder Tools Window Help

Competence Profile(Hartley, Miss Frances Elizabeth (Frances))

☐ Current Competencies

Competence	Proficiency Level	Status	Date From	Date To
298 MAND Safer Blood Trans	1 - Attended Course	Achieved	25-JUN-2010	24-JUN-2013
NHS MAND Safeguarding Ad		Achieved	11-AUG-2009	10-AUG-2012
NHS INOS Clinical Health Ski	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS INOS General Health Ca	1 - Attained	Achieved	29-OCT-2010	28-OCT-2013
NHS INWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS INWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS INWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS INOS Clinical Health Ski	1 - Attained			

Source of Proficiency Rating

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Copy Competencies Outcomes Achieved

11. Click in the fifth cell to add the date the competency assessment will expire

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File Edit View Folder Tools Window Help

Competence Profile(Hartley, Miss Frances Elizabeth (Frances))

☐ Current Competencies

Competence	Proficiency Level	Status	Date From	Date To
298[MAND]Safer Blood Trans	1 - Attended Course	Achieved	25-JUN-2010	24-JUN-2013
NHS[MAND]Safeguarding Ad		Achieved	11-AUG-2009	10-AUG-2012
NHS[INOS]Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS[INOS]General Health Ca	1 - Attained	Achieved	29-OCT-2010	28-OCT-2013
NHS[INWC]Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS[INWC]Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS[INWC]Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS[INOS]Clinical Health Sk	1 - Attained		31-OCT-2011	

Source of Proficiency Rating

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12. Add the date for when the competency assessment will expire, for the NPSA SPN 14 transfusion competency assessments this is normally **3 years** hence e.g. 30-OCT-2014

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File Edit View Folder Tools Window Help

Competence Profile(Hartley, Miss Frances Elizabeth (Frances))

☐ Current Competencies

Competence	Proficiency Level	Status	Date From	Date To
298 MAND Safer Blood Trans	1 - Attended Course	Achieved	25-JUN-2010	24-JUN-2013
NHS MAND Safeguarding Ad		Achieved	11-AUG-2009	10-AUG-2012
NHS INOS Clinical Health Ski	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS INOS General Health Ca	1 - Attained	Achieved	29-OCT-2010	28-OCT-2013
NHS INWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS INWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS INWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS INOS Clinical Health Ski	1 - Attained		31-OCT-2011	30-OCT-2014

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13. Click on the 'Save' icon – top left yellow square. The record is now saved.

Save icon

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File Edit View Folder Tools Window Help

Competence Save (Hartley, Miss Frances Elizabeth (Frances))

☐ Current Competencies

Competence	Proficiency Level	Status	Date From	Date To	
298 MAND Safer Blood Trans	1 - Attended Course	Achieved	25-JUN-2010	24-JUN-2013	<input type="checkbox"/>
NHS MAND Safeguarding Ad		Achieved	11-AUG-2009	10-AUG-2012	<input type="checkbox"/>
NHS NOS Clinical Health Ski	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	<input type="checkbox"/>
NHS NOS General Health Ca	1 - Attained	Achieved	29-OCT-2010	28-OCT-2013	<input type="checkbox"/>
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	<input type="checkbox"/>
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	<input type="checkbox"/>
NHS NWC Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013	<input type="checkbox"/>
NHS NOS Clinical Health Ski	1 - Attained		31-OCT-2011	30-OCT-2014	<input type="checkbox"/>

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14. If you want to add more records of competency assessment, click in the first cell of the last line and then click on the 'new' icon top left and continue as before from point 6, above.

New line icon

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Competence Profile(Hartley, Miss Frances Elizabeth (Frances))

☐ Current Competencies

Competence	Proficiency Level	Status	Date From	Date To
298(MAND)Safer Blood Trans	1 - Attended Course	Achieved	25-JUN-2010	24-JUN-2013
NHS(MAND)Safeguarding Ad		Achieved	11-AUG-2009	10-AUG-2012
NHS(INOS)Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS(INOS)General Health Ca	1 - Attained	Achieved	29-OCT-2010	28-OCT-2013
NHS(INWC)Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS(INWC)Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS(INWC)Clinical Health Sk	1 - Attained	Achieved	02-JUN-2010	02-JUN-2013
NHS(INOS)Clinical Health S	1 - Attained		31-OCT-2011	30-OCT-2014

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Further help and information may be sought from the local Trust ESR representative or, the Yorkshire & Humber representative; Trudy Wagstaff: trudy.wagstaff@nhs.net

Appendix 1

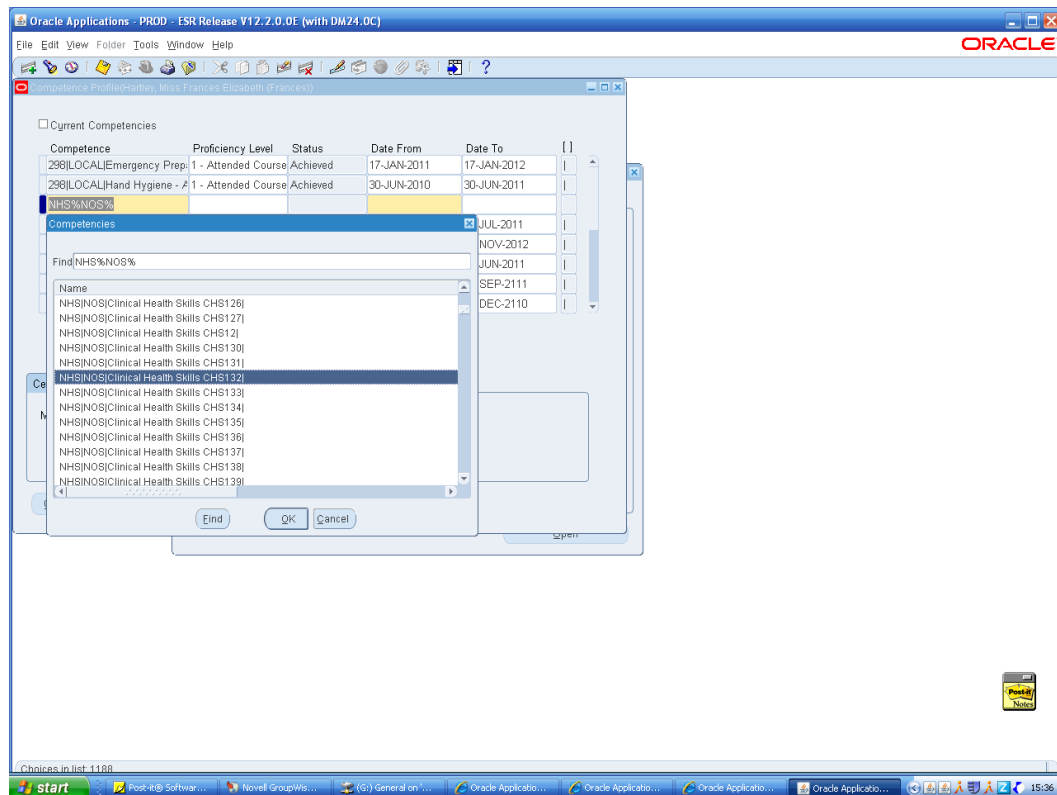
In place of the shortcut in point 7 - If preferred, the full name for the NHS, National Occupational Standard or National Workforce Competence may be entered to find the relevant ESR code, see examples below.

The full names are:

NHS|NOS|Clinical Health Skills CHS132
NHS|NOS|GeneralHealth GEN57
NHS|NWC|Clinical Health Skills CHS101
NHS|NWC|Clinical Health Skills CHS102
NHS|NWC|Clinical Health Skills CHS103

Follow the instructions as explained in points 1 to 6 above but use NHS%NOS% for the National Occupational Standards and scroll down to find CHS132 or GEN57 (in place of point 7) and then continue with points 8 to 13 to complete the transaction.

For example:



Or,

Follow the instructions as explained in points 1 to 6 above but use NHS%NWC% for the National Workforce Competence and scroll down for CHS101, CHS102 and CHS103 (in place of point 7) and then continue with points 8 to 13 to complete the transaction.

For example:

