

Appendix 2. Roles & Responsibilities

Only staff who have completed the relevant Learn blood transfusion (LBT) theory modules can participate in the stage/s of the transfusion process appropriate to their roles. Modules are available via NHS Learnpro <https://nhs.learnpro.uk.com/> or Turas Learn available at <https://learn.nes.nhs.scot/>

Process/Procedure	Can be performed by	Notes
Decision to transfuse (includes consent and patient information)	Medical staff Registered nurse/midwife who has undertaken the recognised training course relating to the non-medical authorisation of blood components programme	The decision to transfuse, including the discussion with the patient, the provision of a patient information leaflet and consent to transfusion must be clearly documented on the transfusion record.
Requesting blood components from the transfusion laboratory	Medical staff, registered nurse/midwife who have undertaken specific training or when following an agreed protocol (such as the Maximum Surgical Blood Ordering Schedule)	Only staff who have adequate knowledge, skills, understanding and education in transfusion can request blood components for transfusion.
Pre-transfusion blood sampling	Phlebotomists, clinical support workers, registered nurse/midwife, operating department practitioner (ODP), medical staff Registered bank/agency nurse/midwife/Locum doctor Assistant Practitioners Undergraduate nursing, midwifery, medical, ODP and physician associate students must provide evidence of meeting proficiency standards and be supervised at all times	Staff can only participate in the pre-transfusion sampling procedure if evidence of competency is provided as per local training programme/agreement As above As above Undergraduate students are required to provide evidence of theory and clinical based simulation skills as part of the undergraduate training programme. For local information access mentor page of relevant Higher Education Institute which will detail the clinical skills guidelines or contact local Practice Education Facilitator.
Authorising blood components	Medical staff Registered nurse/midwife who has undertaken the recognised training course relating to the non-medical authorisation of blood components	Blood components are not designated as medicinal products under the Medicines Act*. All blood components for transfusion must be authorised for the patient and the signature of the person authorising must be clearly documented on the transfusion record.
Collection of blood components for transport to the clinical area	Porters, clinical support workers, maternity care assistants, assistant practitioners, registered nurse/midwife, ODPs	Only if they have received specific training in the collection of blood components AND had undertaken a practical competency assessment (as per BSQR 2005) with a trained blood component collection assessor (SNBTS 2020)

<p>Final (bed)side administration checking procedure</p>	<p>Registered nurse/ midwife, ODPs, medical staff</p> <p>Registered bank/agency nurse/midwife</p> <p>Assistant Practitioners</p> <p>Undergraduate nursing, midwifery, medical, ODP and physician associate students must provide evidence of meeting proficiency standards and be supervised at all times</p>	<p>BSH (2017) recommend an independent checking procedure must be carried out by at least one registered practitioner. If a double independent check is required each practitioner must perform the check at the same time but independently of each other. Must provide evidence of training and competency in the final (bed) side checking procedure.</p> <p>As above</p> <p>Must provide evidence of training and competency in the final bedside checking procedure.</p> <p>Undergraduate students are required to provide evidence of theory and clinical skills simulation as part of the undergraduate training programme.</p> <p>For local information access mentor page of relevant Higher Education Institute which will detail the clinical skills guidelines or contact local Practice Education Facilitator.</p>
<p>Monitoring the transfused patient</p>	<p>Registered nurse/midwife, ODPs, clinical support workers, maternity care assistant or medical staff.</p> <p>Registered bank/agency nurse/midwife</p> <p>Undergraduate nursing, midwifery, ODP and physician associate students can participate in the monitoring of patients being transfused.</p>	<p>Only those who have completed mandatory LBT: Safe Transfusion Practice</p> <p>As above</p> <p>Undergraduate students are required to provide evidence of theory and clinical skills simulation as part of the undergraduate training programme.</p> <p>For local information access mentor page of relevant Higher Education Institute which will detail the clinical skills guidelines or contact local Practice Education Facilitator.</p>

*Blood components are not designated as medicinal products under the Medicines Act and therefore cannot legally be prescribed by any practitioner. The term prescription legally relates only to medicines listed in the British National Formulary; for blood components it is a written instruction or authorisation to transfuse or administer.