

### Purpose of this procedure:

This procedure outlines the transfusion education and training requirements of staff members involved in any stage of the transfusion process.

### The Procedure:

British Society for Haematology guidance and Quality Improvement Scotland (now known as NHS Healthcare Improvement Scotland (NHSHIS)) Clinical Standards Blood Transfusion 2006 state that all staff involved in any part of the transfusion process must receive valid, regular and adequate training.

Only staff who have completed the relevant Learnbloodtransfusion (LBT) eLearning theory modules can participate in the stage/s of the transfusion process appropriate to their role. LBT modules are available via NHS Learnpro <https://nhs.learnprouk.com/> or TURAS Learn (available at <https://learn.nes.nhs.scot/>) and require update every two years. Further detail can be found in [Roles and Responsibilities in Blood Transfusion](#).

ALL staff involved in the transfusion process must complete, as a minimum, the LBT *Safe transfusion practice* module or the equivalent module appropriate to role (e.g. LBT *Safe transfusion practice for paediatrics* or LBT *Safe transfusion laboratory practice*). A designated LBT *Phlebotomy pathway* and LBT *Blood collection pathway* are available for staff that are only involved in the sampling or blood collection procedures respectively. Additionally, the [SNBTS Transfusion Training Matrix](#) provides further guidance on appropriate theory-based modules for staff to enhance their knowledge and understanding of transfusion practice as aligned to role.

The LBT *Safe transfusion practice* module incorporates education and assessments regarding the following:

- Haemovigilance
- ABO serology
- Requesting and authorising blood components
- Blood sampling
- Blood component collection
- Blood component administration
- Caring for the patient receiving a transfusion

If you do not have valid transfusion education for your job role, then you must not participate in transfusion practice.

## Undergraduate students

Undergraduate students (nursing, midwifery, medical, operating department practitioners and physician associates) can participate, if appropriate, in procedures aligned to their roles which will provide a learning opportunity to develop the knowledge and skills required upon graduation and preparation for practice as a newly qualified practitioner. Role specific involvement is detailed in [Roles and Responsibilities in Blood Transfusion](#).

Undergraduate students must provide evidence of learning in both theory and clinical skills simulation for roles aligned to the transfusion process and be supervised as per local regional agreements with Higher Education Institutes and NHS Lothian. For local information access relevant Higher Education Institute which will detail the clinical skills guidelines or contact your local Practice Education Facilitator or appropriate educational supervisor. Overall accountability and responsibility for undergraduate involvement in the transfusion process whilst on practice placement is the responsibility of the registrant involved.

All students must provide evidence of safely demonstrating proficiency at the point of registration for the delivery of person-centred, safe and effective care.

## Agreed mandatory transfusion education for staff groups in NHS Lothian

### Registered nurses, midwives, ODPs, theatre practitioners

- Complete LBT *Safe transfusion practice* eLearning at induction
- Attend face to face blood transfusion session at induction
- Update LBT *Safe transfusion practice* eLearning every two years (revalidation option can be selected for second and subsequent completions)
- For those involved in collecting blood components from the laboratory or satellite blood fridge see [Practical competency assessment for blood collectors](#)
- Midwives are required to complete LBT *Anti-D* eLearning at induction and update every two years. This is also a requirement of nurses who are involved in decisions about, and administering, anti-D (e.g. nurses working in early pregnancy clinics)
- Further guidance is provided in the [SNBTS Transfusion Training Matrix](#)

### Foundation Year One (FY1) doctors

- Face to face transfusion education is delivered during FY1 induction
- Complete LBT *Safe transfusion practice*, LBT *Consent for transfusion*, LBT *Blood components & indications for use*, LBT *Acute transfusion reactions* and LBT *Safe blood sampling for transfusion* eLearning at induction and every two years
- Further guidance is provided in the [SNBTS Transfusion Training Matrix](#)

## Physician associates

- Face to face transfusion education is delivered during physician associate induction
- Complete LBT *Safe transfusion practice*, LBT *Consent for transfusion*, LBT *Blood components & indications for use*, LBT *Acute transfusion reactions* and LBT *Safe blood sampling for transfusion* eLearning at induction and every two years
- Further guidance is provided in the [SNBTS Transfusion Training Matrix](#)

## Doctors joining NHS Lothian after FY1 year

- Complete LBT *Safe transfusion practice*, LBT *Consent for transfusion*, LBT *Blood components & indications for use*, LBT *Acute transfusion reactions* and LBT *Safe blood sampling for transfusion* eLearning at induction and every two years
- Further guidance is provided in the [SNBTS Transfusion Training Matrix](#)

## Doctors in training

- Complete LBT *Safe transfusion practice*, LBT *Consent for transfusion*, LBT *Blood components & indications for use*, LBT *Acute transfusion reactions* and LBT *Safe blood sampling for transfusion* eLearning at induction and every two years
- Further guidance is provided in the [SNBTS Transfusion Training Matrix](#)

## Consultants and non-consultant career grade medical staff

- Complete LBT *Safe transfusion practice*, LBT *Consent for transfusion*, LBT *Blood components & indications for use* eLearning every two years as part of appraisal process
- Further guidance is provided in the [SNBTS Transfusion Training Matrix](#)
- A transfusion training waiver form is available for completion and retention by those consultants and non-consultant career grade medical staff who are never involved in any stage of the transfusion process, and are not responsible for supervising individuals who are involved in any aspect of the transfusion process, and therefore do not need to complete the above training

## Healthcare support workers (HCSWs) and assistant practitioners (APs)

- Complete role-relevant units of LBT *Safe transfusion practice* eLearning at induction:
  - units 1 ‘Haemovigilance’ and 2 ‘Blood group serology’ are mandatory for all
  - unit 4 ‘Sampling procedure’ is required for those who take pre-transfusion blood samples
  - unit 5 ‘Collection procedure’ is required for those who go to collect blood from the laboratory or a satellite blood fridge

- unit 7 'Management of transfused patient' is required for those who may be involved in monitoring patients who are receiving a transfusion
- HCSWs and APs who are *only* involved in collecting blood from the laboratory or a satellite blood fridge (and no other aspect of transfusion) can just complete the LBT *Collection pathway* eLearning
- Band 3 HCSWs and APs are required to attend the NHS Lothian venepuncture training day prior to becoming involved in taking pre-transfusion blood samples. Band 3 HCSWs and APs who are only involved in taking pre-transfusion blood samples (and no other aspect of transfusion) can just complete the LBT *Phlebotomy pathway* eLearning
- Update LBT eLearning every two years (revalidation option can be selected for second and subsequent completions)
- For those involved in collecting blood components from the laboratory or satellite blood fridge see [Practical competency assessment for blood collectors](#)
- Band 4 APs working in haem-oncology ONLY may potentially be involved in other aspects of the transfusion process: APs must discuss this individually with their line manager
- HCSWs and APs working in a role or setting where they are not involved in any stage of the transfusion process do not need to complete the above transfusion education
- Further guidance is provided in the [SNBTS Transfusion Training Matrix](#)

## Porters

- A face-to-face transfusion session is provided at induction and every two years thereafter
- Porter managers are required to inform the relevant transfusion practitioner of any new members of staff joining their team
- For those involved in collecting blood components from the laboratory or satellite blood fridge see [Practical competency assessment for blood collectors](#)

## Phlebotomists

- Complete LBT *Phlebotomy pathway* eLearning at induction and every two years thereafter
- Further guidance is provided in the [SNBTS Transfusion Training Matrix](#)

## Associated materials/references:

[NHS Lothian Blood Transfusion Policy](#)

[NHS Lothian Blood Transfusion Procedures](#)

[SNBTS Transfusion Training Matrix](#)