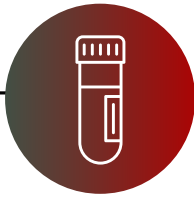


Phlebotomy Competency Workbook



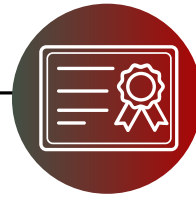
Phlebotomy Theory

Access to all current practice guidelines for taking blood in a safe and professional manner



Practical skill demonstration

Demonstration of correct procedures for phlebotomy in line with current practice guidelines



Supervised Practice & Competence Assessment

Clinical competency assessment and sign off

Delegate Name:



HEALTH
Academy

How to use this workbook

This workbook provides five steps to your competency in taking blood. Each element is a really important part of your journey to competency in this clinical skill.

1

Theory training

In this section, you will need to ensure that you have either completed a course which covers all of the relevant theory content, or have completed self-directed reading in each of the areas. You will self-assess and sign off your competency in this area.

2

Simulation training

Prior to practicing on real people, it is helpful to practice your clinical skills in a simulation environment. This may be through a face-to-face workshop or using clinical training equipment in your own environment. You can use this section as a checklist of skills to achieve.

3

Supervised practice assessment

In order to start taking blood, you must complete supervised practice. We have included 5 supervision episodes which can be recorded. Many health professionals will require more than 5 episodes. Please ensure that you follow local guidelines and only undertake unsupervised practice when competent.

4

Supervisor details

Those professionals that are observing and assessing you in practice will need to enter their details in this section. It is also an opportunity for them to add any comments or action points for you to improve your skills.

5

Final competency sign off

Once you have completed theory training and supervised practice in line with your organisations local guidelines and have met the required standard in taking blood, you can complete your final sign off and a supervisor can sign you off as competent.

Phlebotomy Theory

Self-assessment - initial that you have either completed formal training or completed self-directed learning in each of the following theory elements

Theory element

Initial

Able to identify anatomical structures and explain the appropriate choice of venous sites applicable to venepuncture

Describe the role of the health professional in undertaking the skill of venepuncture

Able to outline the indications for venepuncture

Understand the importance of communication with patients to facilitate safe and effective venepuncture

Understand the principles of Aseptic Non-Touch Technique (ANTT) and appropriate Personal Protective Equipment (PPE)

Knowledge of the preparation prior to the procedure and how to obtain informed consent

Knowledge of the effective technique for the procedure including blood draw sequence and the correct use of equipment

Understand the importance of correct documentation and correct labeling

Understand the principles in the management of complications

Understand the principles of safe selection, use and disposal of sharps, and actions required if needle stick injury occurs

Knowledge of the relevant veins, nerves and arteries that relate to venepuncture

Understand the processes required to be undertaken in a clinical assessment to choose the appropriate vein

Be able to explain the safe management and disposal of sharps, and the risks associated with the transmission of blood borne viruses during the procedure

Be able to determine the blood collection sets and bottles required for the procedure

Identify the pharmacological (if applicable) and non-pharmacological methods of pain relief

Understand requirement for topical anaesthetic agents and be familiar with their indications and application (if applicable in work setting)

Understand when other health care professionals should be involved in assisting with the procedure

Understand the principles of the correct application of the tourniquet

Understand potential problems and complications associated with venepuncture and be able to outline the appropriate actions to prevent and treat these complications

Workshop simulation assessment

During your workshop training your trainer will have an opportunity to observe you completing the following elements and will sign these off. If your simulated practice is self directed using your own equipment, use this checklist to ensure you are competent in each element.

Clinical Skill - Demonstrates:	Comments & Sign
Correct patient identification techniques	
Appropriate patient preparation, communication and consent procedures	
Correct handling and choice of equipment	
Consideration of personal safety and that of others (e.g. fainting risks, sharps use)	
Correct identification of a suitable vein using thorough palpation techniques on BOTH arms	
Appropriate positioning and tourniquet use with physiological rationales	
Use of correct infection control measures and appropriate use of PPE and ANTT	
Provision of local anaesthesia as required (as per local policy) Local training needed	
Correct needle insertion technique and angle (<30 degrees)	
Correct sample vial/s selection (+ line-priming tube to be used if using butterfly)	
Reduction of discomfort for patient and maintenance of dignity and privacy	
Accurate sampling techniques (e.g. correct order of draw and inversion for multiple samples)	
Use of appropriate troubleshooting techniques	
Acknowledgment of mistakes with immediate rectification	
Safe removal and disposal of sharps and blood matter	
Effective care of puncture site	
Good management in the event of unsuccessful sampling	
Correct completion of documentation and careful sample labelling	
Safe storage and dispatch of samples	

Record of supervised practice

The health professional must be able to discuss the rationale for each of the actions and demonstrate competence in the practical application of these skills as applicable. Following a minimum of 5 supervisions, further supervision maybe required for some individuals.

Supervisor note: Please initial the box of each supervised practice example witnessed and complete supervisor details on next page. If element was not relevant to situation please put N/A.

Clinical Skill - Demonstrates:	1	2	3	4	5	Pass/Refer
Correct patient identification techniques						
Appropriate patient preparation, communication and consent procedures						
Correct handling and choice of equipment						
Consideration of personal safety and that of others (e.g. fainting risks, sharps use)						
Correct identification of a suitable vein using thorough palpation techniques on BOTH arms						
Appropriate positioning and tourniquet use with physiological rationales						
Use of correct infection control measures and appropriate use of PPE and ANTT						
Provision of local anaesthesia as required (as per local policy) Local training needed						
Correct needle insertion technique and angle (<30 degrees)						
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Accurate sampling techniques (e.g. correct order of draw and inversion for multiple samples)						
Use of appropriate troubleshooting techniques						
Acknowledgment of mistakes with immediate rectification						
Safe removal and disposal of sharps and blood matter						
Effective care of puncture site						
Good management in the event of unsuccessful sampling						
Correct completion of documentation and careful sample labelling						
Safe storage and dispatch of samples						

Supervisor details

WHO CAN ASSESS COMPETENCY?

Anyone who:

- Has done specific phlebotomy training
- Is familiar with blood taking policy (both local and national) and has sound knowledge of the required procedures.
- Has remained up to date with guidance on phlebotomy
- Is confident, experienced and competent at performing phlebotomy themselves
- Practices phlebotomy regularly
- Is willing and available to sign you off

If you have supervised this health professional in the clinical skills of phlebotomy/venepuncture, please enter your details below:

Name	Initial	Role/Profession

Supervisor / Trainer comments

Below is a space for any supervisor or trainer to document any comments, recommendations or suggested action plans for development of delegate

Final Competency Sign-off

Completed relevant theory training and extra reading around phlebotomy as required	<input type="checkbox"/>
Can provide examples of why blood is taken in local department	<input type="checkbox"/>
Demonstrates good anatomical knowledge	<input type="checkbox"/>
Has had a suitable amount of supervised practice (and in accordance with minimums dictated in local organisation policy)	<input type="checkbox"/>
Communication around each element of phlebotomy procedure has developed to be consistently thorough, confident, and patient-centred	<input type="checkbox"/>
Minimises discomfort at all times for patient in various ways. Shows good pastoral skills. More confidently able to 'multitask'	<input type="checkbox"/>
Consistently maintains safety throughout whole procedure (e.g. patient Identification / sharps handling and disposal/ infection control/ fainting risks)	<input type="checkbox"/>
Handles and prepares correct equipment confidently. Able to choose and assemble equipment with little assistance	<input type="checkbox"/>
Competent at obtaining optimal positioning of patient and management of environment. Demonstrates being adaptable to location and patient	<input type="checkbox"/>
Chooses (and can justify) appropriate sites / veins. Preparing to move on to more complex sites (e.g. hands) or complex patients	<input type="checkbox"/>
Shows good use of a tourniquet and recognises when to re-adjust as required	<input type="checkbox"/>
Understands and follows correct order of draw and correct sample tube selection, starting to learn common types of blood tests in local area	<input type="checkbox"/>
Completes all required documentation consistently, accurately, and conscientiously	<input type="checkbox"/>
Able to reflect on mistakes and can explain potential complications and actions that should be taken to minimise and rectify issues	<input type="checkbox"/>
Copes well in the event of unsuccessful sampling. Does not panic and stays calm. Appears confident to try again	<input type="checkbox"/>
Read all relevant local policies including: Venepuncture/Phlebotomy, Infection Control, Needle stick injury, Incident reporting, Blood spills, GDPR, Safeguarding, Consent & Chaperoning	<input type="checkbox"/>

Supervisor: I confirm that the named practitioner has demonstrated all of the above final competencies and I am satisfied that this person is competent to practice phlebotomy effectively independently

Practitioner: I agree to maintain the competence demonstrated here and I feel competent to practice phlebotomy safely and effectively

Name:
Date:
Signature:

Name:
Date:
Signature: