

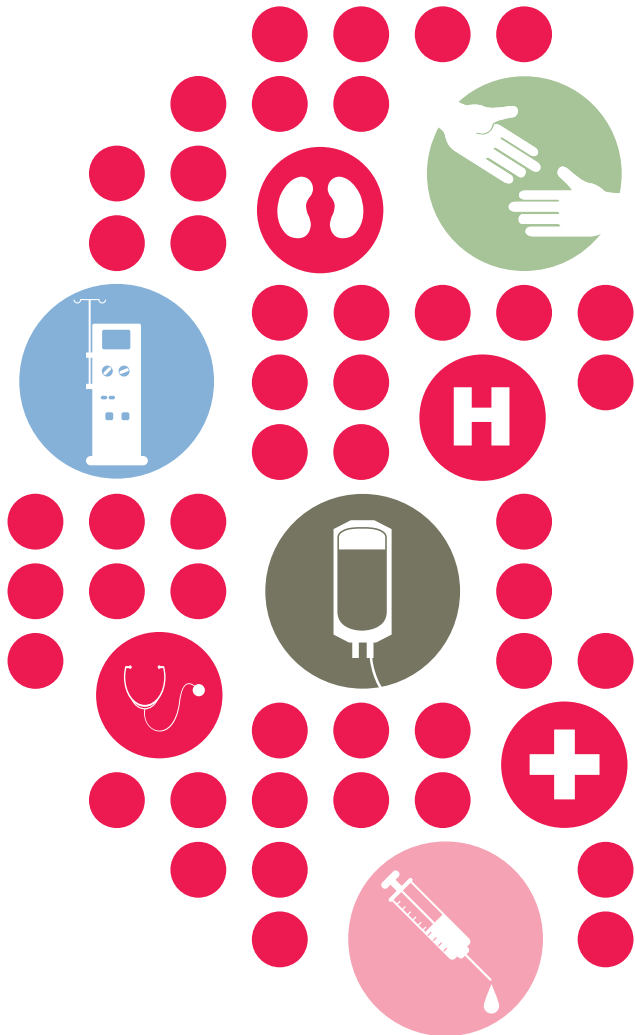


**SHAREHD**

A Quality Improvement Collaborative to scale up Shared Haemodialysis Care in centre based haemodialysis patients



**The  
Health  
Foundation**



# SHARED HAEMODIALYSIS CARE COMPETENCY HANDBOOK

Name:
Hospital Number:
Named Nurse/Team
Date:
Machine Type:
Dialysis unit:



# My Choices and Progress Record



I would like to learn how to:	Page	✓	Step 1	Step 2	Step 3	Competent
Clean my hands	6					
Do my Observations	7					
Prepare my pack	9					
Line my machine	11					
Prime my machine	11					
Programme my machine	14					
Prepare my fistula	17					
Prepare my line access	20					
Start my dialysis	22					
Care for myself during dialysis	25					
Discontinue my dialysis - fistula	28					
Discontinue my dialysis - line	31					
Complete after my dialysis	33					
Give my Erythropoietin injection	36					





# My Shared Care Record

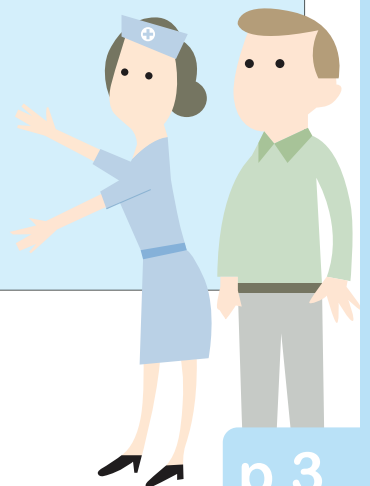


How I like to learn?

What would make it easier for me?

What help do I need?

Anything else about me that might help with my shared care?





# Reassessment of competency & staff signature



## Hand Cleaning

Date									
Signature									

## Weight and observations

Date									
Signature									

## Preparing pack

Date									
Signature									

## Lining machine

Date									
Signature									

## Priming machine

Date									
Signature									

## Programming machine

Date									
Signature									

## Access

Date									
Signature									

## Starting dialysis

Date									
Signature									



# Reassessment of competency & staff signature



## Care during dialysis

Date									
Signature									

## Discontinuing dialysis

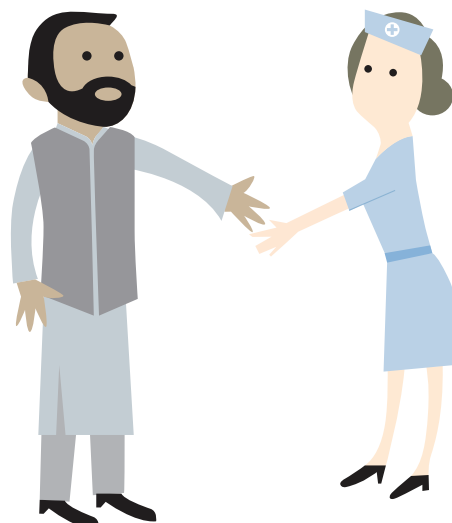
Date									
Signature									

## Completing after dialysis

Date									
Signature									

## Giving Erythropoietin

Date									
Signature									





# Hand Cleaning



## I clean my hands following my unit procedure

I understand the importance of cleaning my hands to reduce the risk of infection for myself and others

## I am learning about and discussing hand cleaning technique

Step 1	Patient	Nurse	Helper	Date
Hand cleaning				

## I am being supervised by staff

Step 2	Patient	Nurse	Helper	Date
Hand cleaning				

## I am practising on my own with minimal supervision

Step 3	Patient	Nurse	Helper	Date
Hand cleaning				

**I feel safe and confident to do this without direct supervision. I understand that by signing, I take responsibility for following my unit's procedure**

Competent	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

Competent	Signature	Print Name	Date
Qualified nurse			
Support staff			



## Doing my observations



**I weigh myself and do my observations following my unit procedures**

### **Weight**

- I weigh myself
- I understand what my target/dry weight is
- I work out how much fluid I need to take off

### **Blood pressure & Pulse**

- I take my own blood pressure and pulse
- I understand what my normal blood pressure and pulse is

### **Temperature**

- I take my temperature
- I understand what my normal temperature is
- I understand what a high temperature means and possible causes





# Doing my observations



## I am learning about and discussing my weight and observations

Step 1	Patient	Nurse	Helper	Date
Weight				
Blood Pressure				
Temperature				

## I am being supervised by staff

Step 2	Patient	Nurse	Helper	Date
Weight				
Blood Pressure				
Temperature				

## I am practising on my own with minimal supervision from staff

Step 3	Patient	Nurse	Helper	Date
Weight				
Blood Pressure				
Temperature				

**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure**

	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

	Signature	Print Name	Date
Qualified nurse			
Support staff			





## Preparing my pack



### I prepare my pack following my unit procedure

#### Hand cleaning

- I clean my hands following my unit procedure
- **I have completed this competency**



#### Prepare equipment

- I check my equipment is correct for my dialysis access
- I understand why I have a prescription for my equipment

#### Prepare pack

- I open and prepare my pack
- I understand how to reduce the risk of contamination
- I tell the staff if there are any problems





# Preparing my pack



## I am learning about and discussing how to prepare my pack

Step 1	Patient	Nurse	Helper	Date
Equipment				
Prepare pack				

## I am being supervised by staff

Step 2	Patient	Nurse	Helper	Date
Equipment				
Prepare pack				

## I am practising on my own with minimal supervision

Step 3	Patient	Nurse	Helper	Date
Equipment				
Prepare pack				

**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure**

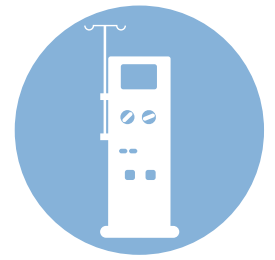
	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

	Signature	Print Name	Date
Qualified nurse			
Support staff			



# Preparing my dialysis machine



I prepare my dialysis machine following my unit procedure

## Hand cleaning

- I clean my hands following my unit procedure
- **I have completed this competency**



## Prepare equipment

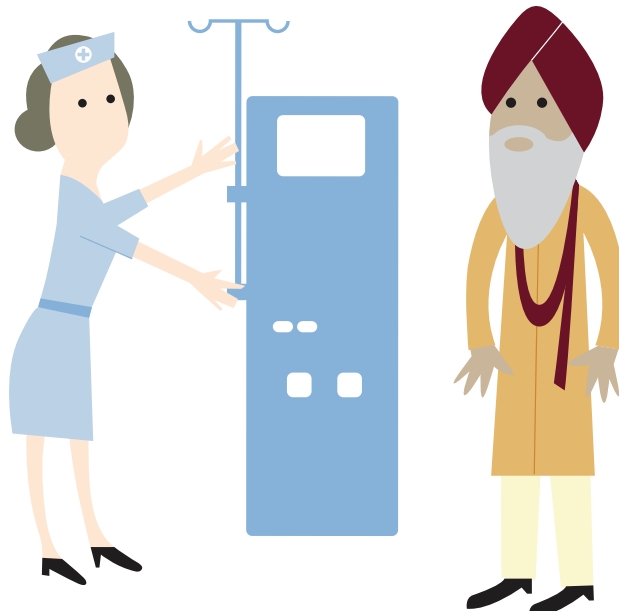
- I check my equipment against my prescription
- I understand why I have a prescription for my equipment

## Line machine

- I line my machine
- I check the concentrates with my prescription
- I know where each part goes and why

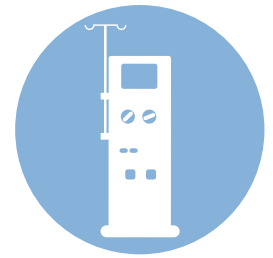
## Prime machine

- I prime my machine
- I understand the reasons for correct priming
- I tell the staff if there are any problems





# Preparing my dialysis machine



## I am learning about and discussing how to prepare my machine

Step 1	Patient	Nurse	Helper	Date
Prepare equipment & line machine				
Prime machine				

## I am being supervised by staff

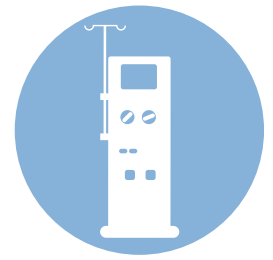
Step 1	Patient	Nurse	Helper	Date
Prepare equipment & line machine				
Prime machine				

## I am practising on my own with minimal supervision

Step 1	Patient	Nurse	Helper	Date
Prepare equipment & line machine				
Prime machine				



## Preparing my dialysis machine



**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure to *LINE* the machine**

Competent	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

Competent	Signature	Print Name	Date
Qualified nurse			
Support staff			

**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure to *PRIME* the machine**

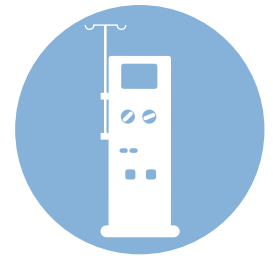
Competent	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

Competent	Signature	Print Name	Date
Qualified nurse			
Support staff			



# Programming my dialysis machine



## I programme my dialysis machine following my unit procedure

### Check Prescription

- I check it is my own prescription I am following
- I understand my prescription and how it affects my treatment
- I ask the staff if there is anything I don't understand or notice is different

### Set ultrafiltration rate and dialysis time

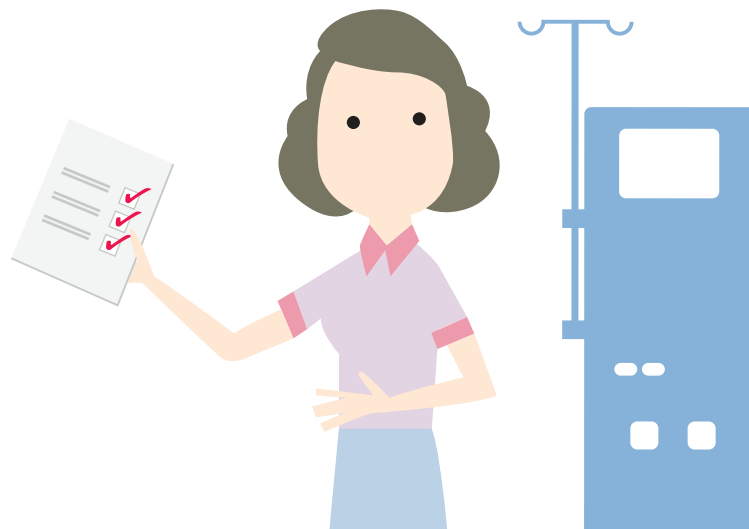
- I know my dialysis time and why it is prescribed
- I programme my weight loss and make sure it is a safe amount to remove following renal association guidelines and/ or my Doctors advice recorded in my medical records
- I discuss any changes that may affect my body weight with my dialysis nurse

### Set anticoagulant regimen

- I understand what my anticoagulant is for
- I set my anticoagulant if it is prescribed, following my prescription
- I let staff know if I have any problems

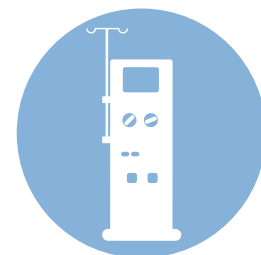
### Set dialysate flow and sodium and bicarbonate levels

- I understand what my levels are and why they are prescribed
- I set them following my prescription
- I let staff know if I have any problems





# Programming my dialysis machine



**I am learning about and discussing how to programme my machine**

<b>Step 1</b>	Patient	Nurse	Helper	Date
Prescription				
Ultrafiltration & Time				
Anticoagulation				
Dialysate & Sodium & Bicarbonate levels				

**I am being supervised by staff**

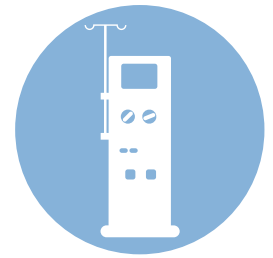
<b>Step 2</b>	Patient	Nurse	Helper	Date
Prescription				
Ultrafiltration & Time				
Anticoagulation				
Dialysate & Sodium & Bicarbonate levels				

**I am practising on my own with minimal supervision**

<b>Step 3</b>	Patient	Nurse	Helper	Date
Prescription				
Ultrafiltration & Time				
Anticoagulation				
Dialysate & Sodium & Bicarbonate levels				



## Programming my dialysis machine



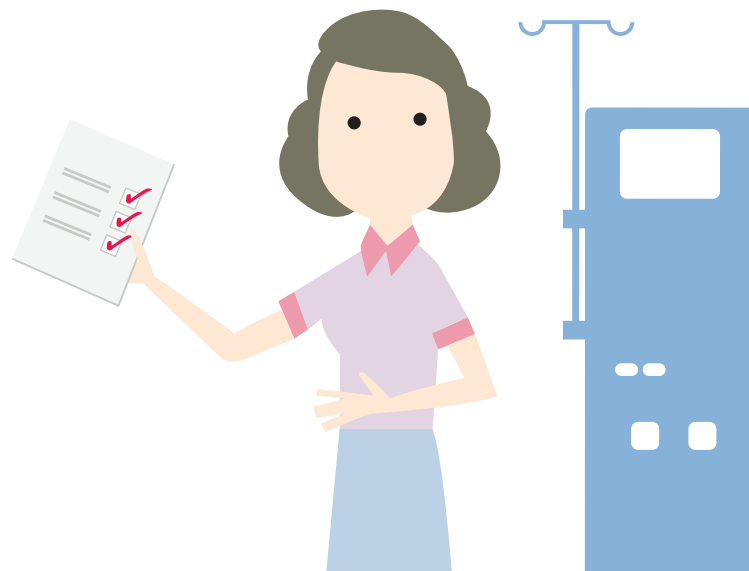
**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure**

**I have been advised about how to safely remove fluid for me  
and I understand that this will be checked regularly by staff**

Competent	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

Competent	Signature	Print Name	Date
Qualified nurse			
Support staff			







## Preparing my fistula/graft for dialysis



I prepare my fistula/graft following my unit procedure

### Hand cleaning

- I clean my hands following my unit procedure
- **I have completed this competency**



### Prepare equipment

- I check my equipment following my own prescription
- I understand how to reduce the risk of contamination
- **I have completed this competency**



### Check fistula/graft and assess needle sites

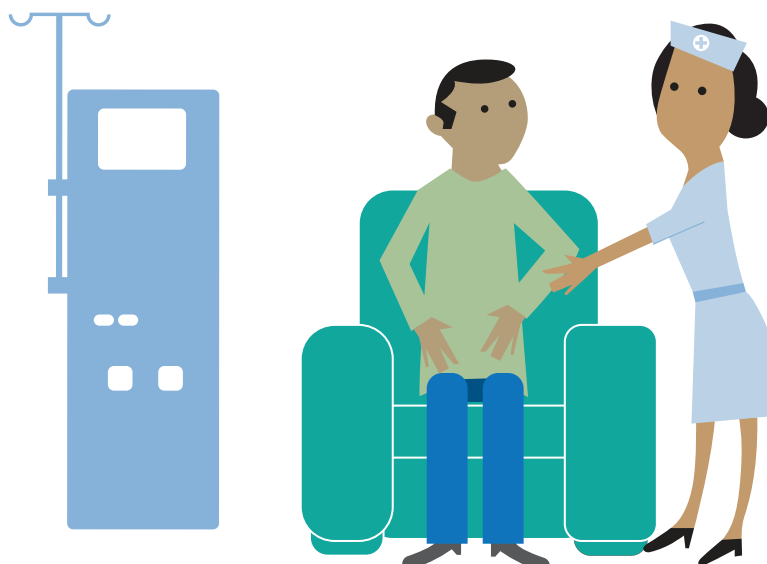
- I understand what to check my fistula/graft for and why
- I understand where to needle and why
- I tell the staff if there are any signs of infection or changes

### Prepare sites for needling

- I prepare my needle sites following my unit procedure

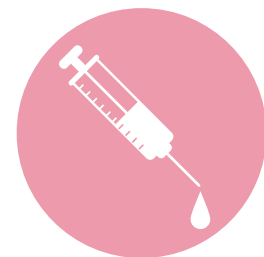
### Insert needles

- I insert my needles safely in appropriate sites
- I check my blood flow
- I secure my needles following my unit procedure





## Preparing my fistula/graft for dialysis



### I am learning about and discussing how to prepare my fistula/graft

Step 1	Patient	Nurse	Helper	Date
Check access				
Prepare sites				
Insert needles				

### I am being supervised by staff

Step 2	Patient	Nurse	Helper	Date
Check access				
Prepare sites				
Insert needles				

### I am practising on my own with minimal supervision

Step 3	Patient	Nurse	Helper	Date
Check access				
Prepare sites				
Insert needles				



## Preparing my fistula/graft for dialysis

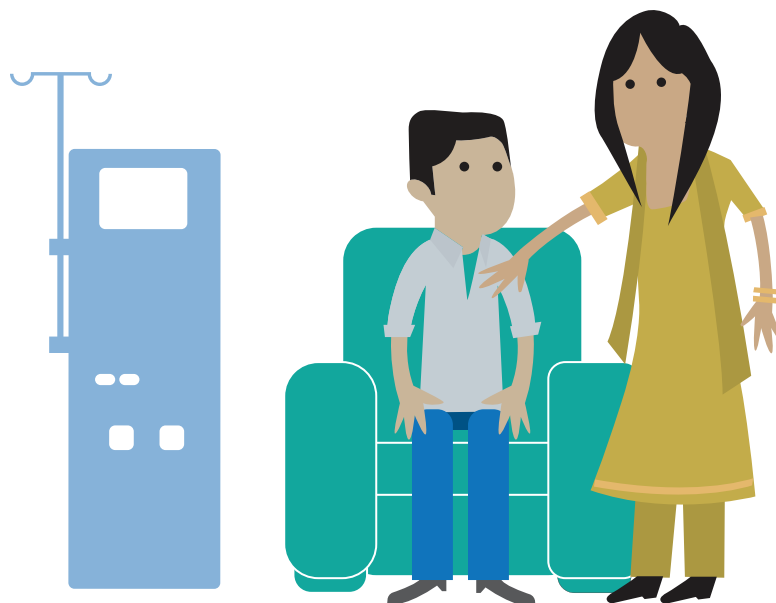


I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following my unit's procedure

Competent	Signature	Print Name	Date
Patient			
Helper			

In my opinion, a safe level of practice has been achieved in this section

Competent	Signature	Print Name	Date
Qualified nurse			
Support staff			





## Preparing my line access for dialysis



I prepare my line access following my unit procedure

### Hand Cleaning

- I clean my hands following my unit procedure
- **I have completed this competency**



### Prepare equipment

- I check my equipment following my own prescription
- I understand how to reduce the risk of contamination
- **I have completed this competency**

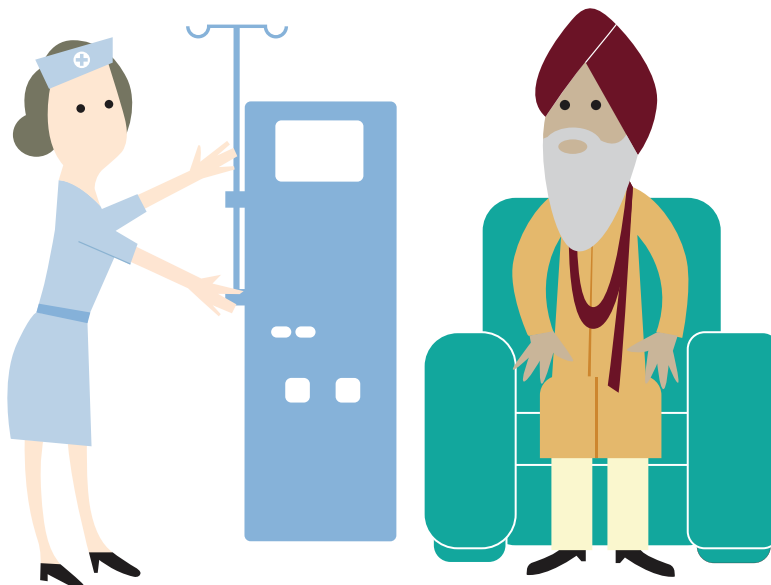


### Assess site

- I remove my dressing following my unit procedure
- I understand what to check my site for and why
- I inform staff if there are any signs of infection or changes

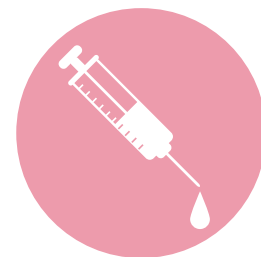
### Prepare site

- I clean my site and redress
- I prepare my connections and check flow following my unit procedure
- I inform staff if there are any problems





## Preparing my line access for dialysis



### I am learning about and discussing how to prepare my line for dialysis

Step 1	Patient	Nurse	Helper	Date
Assess site				
Prepare site				

### I am being supervised by staff

Step 2	Patient	Nurse	Helper	Date
Assess site				
Prepare site				

### I am practising on my own with minimal supervision

Step 3	Patient	Nurse	Helper	Date
Assess site				
Prepare site				

**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure**

	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

	Signature	Print Name	Date
Qualified nurse			
Support staff			



## Starting my dialysis



**I start my dialysis following my unit procedure**

### **Hand cleaning**

- I clean my hands following my unit procedure
- **I have completed this competency**



### **Prepare machine**

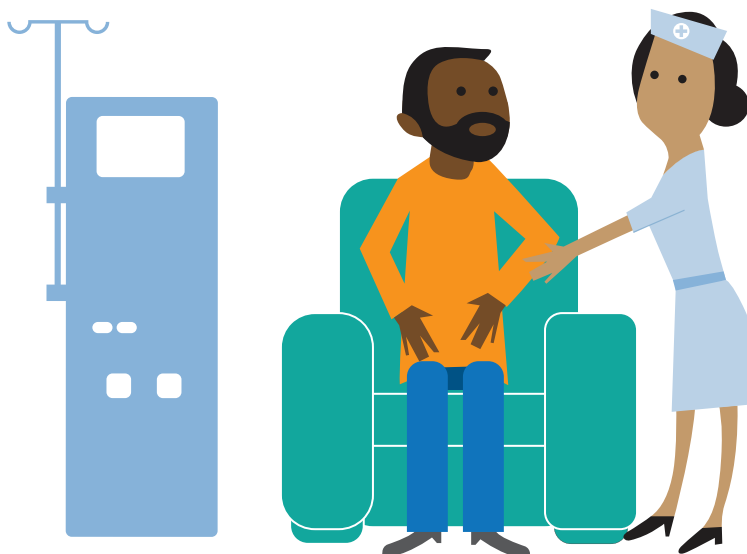
- I check my machine is ready to start dialysis
- I understand the importance of the safety checks I need to make

### **Start dialysis**

- I connect myself to the dialysis machine following my unit procedure
- I start my dialysis treatment
- I understand the importance of checking the machine pressures
- I administer my anticoagulant (if prescribed)

### **Record machine observations**

- I record my machine observations
- I understand the observations and why I record them
- I inform staff if any observations are out of my normal range





# Starting my dialysis



## I am learning about and discussing how to start my dialysis

Step 1	Patient	Nurse	Helper	Date
Prepare machine				
Start dialysis				
Record observations				

## I am being supervised by staff

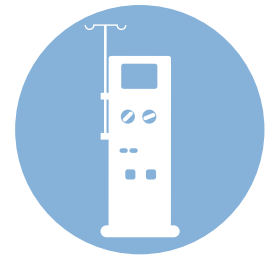
Step 2	Patient	Nurse	Helper	Date
Prepare machine				
Start dialysis				
Record observations				

## I am practising on my own with minimal supervision

Step 3	Patient	Nurse	Helper	Date
Prepare machine				
Start dialysis				
Record observations				



## Starting my dialysis



**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure**

	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

	Signature	Print Name	Date
Qualified nurse			
Support staff			







## Care during my dialysis



### I care for myself and my machine during dialysis following my unit procedures

#### My Observations

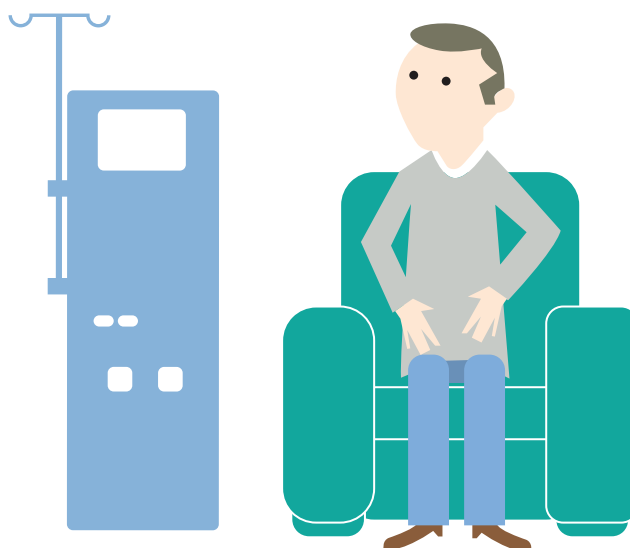
- I check my blood pressure and pulse following my unit procedure
- I know what to do if I feel unwell

#### Machine observations

- I check my machine settings following my unit procedure
- I understand what to look for and why
- I inform staff if there are any problems

#### Alarms

- I know the common alarms and what to do following my unit procedure
- I inform staff if there is anything I am not sure about





## Care during my dialysis



**I am learning about and discussing how care for myself and my machine during my dialysis**

<b>Step 1</b>	Patient	Nurse	Helper	Date
My observations				
Machine observations				
Alarms				

**I am being supervised by staff**

<b>Step 2</b>	Patient	Nurse	Helper	Date
My observations				
Machine observations				
Alarms				

**I am practising on my own with minimal supervision**

<b>Step 3</b>	Patient	Nurse	Helper	Date
My observations				
Machine observations				
Alarms				



## Care during my dialysis

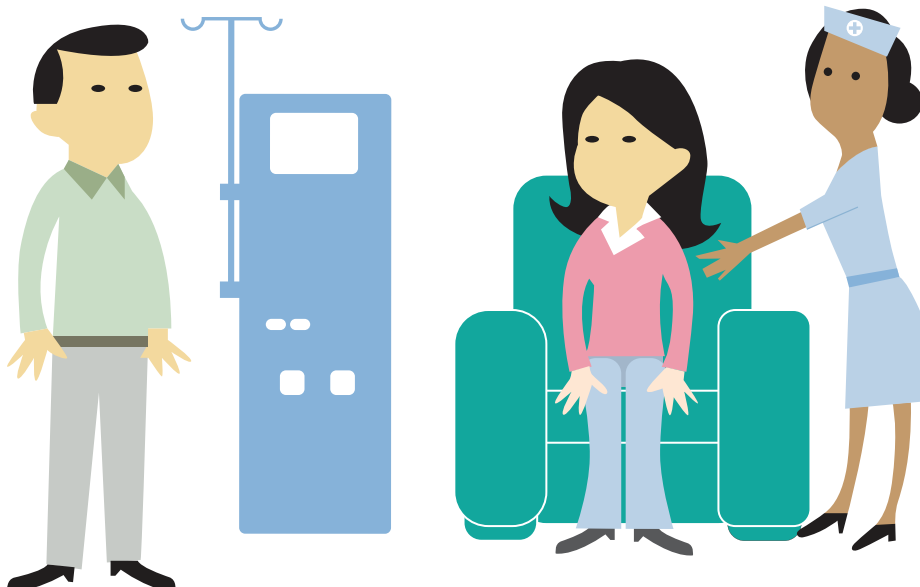


**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure**

	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

	Signature	Print Name	Date
Qualified nurse			
Support staff			





## Discontinuing dialysis with my fistula/graft



**I discontinue dialysis with my fistula/graft following my unit procedure**

### Hand cleaning

- I clean my hands following my unit procedure
- **I have completed this competency**



### Prepare and 'wash back'

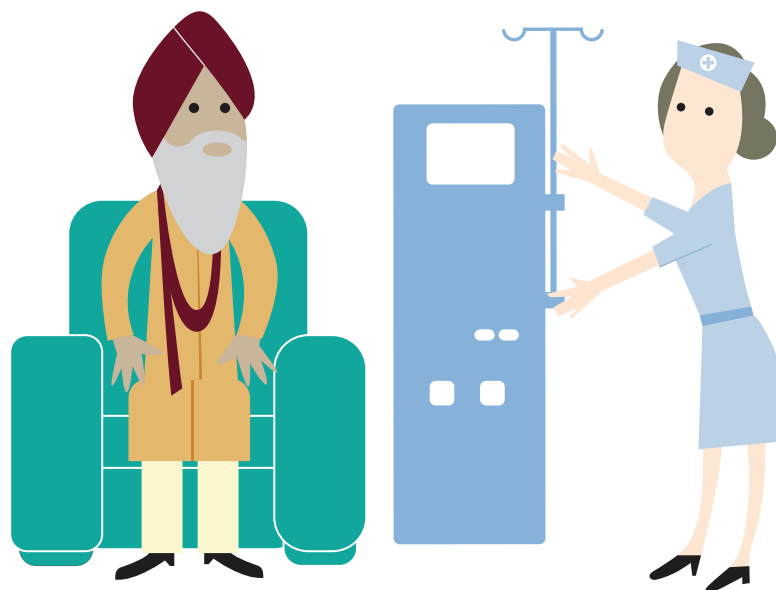
- I prepare my equipment and lines following my unit procedure
- I prepare my machine for disconnection
- I check my line and needle is clamped before disconnection
- I 'wash back' following my unit procedure

### Disconnect from the machine:

- I clamp and disconnect my venous line from my needle
- I remove and dispose of my needles following my unit procedure

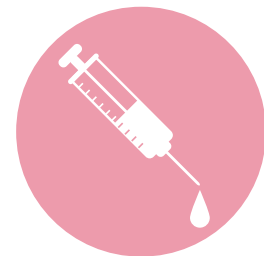
### Apply pressure to needle sites

- I apply pressure to my needle sites until bleeding stops
- I apply my dressing





## Discontinuing dialysis with my fistula/graft



**I am learning about and discussing how to discontinue dialysis with my fistula/graft**

Step 1	Patient	Nurse	Helper	Date
Prepare and wash back				
Disconnect				
Apply pressure to needle sites				

**I am being supervised by staff**

Step 2	Patient	Nurse	Helper	Date
Prepare and wash back				
Disconnect				
Apply pressure to needle sites				

**I am practising on my own with minimal supervision**

Step 3	Patient	Nurse	Helper	Date
Prepare and wash back				
Disconnect				
Apply pressure to needle sites				



## Discontinuing dialysis with my fistula/graft



**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure**

	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

	Signature	Print Name	Date
Qualified nurse			
Support staff			





## Discontinuing dialysis with my line access



### I discontinue dialysis with my line following my unit procedure

#### Hand cleaning

- I clean my hands following my unit procedure
- **I have completed this competency**



#### Prepare and 'wash back'

- I prepare my equipment and lines following my unit procedure
- I prepare my machine for disconnection
- I check my lines are clamped before disconnection
- I 'wash back' following my unit procedure

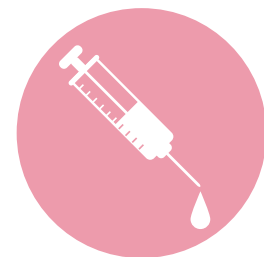
#### Disconnect from the machine:

- I clamp and disconnect the venous line from my line
- I flush and lock my line following my prescription and secure





## Discontinuing dialysis with my line access



**I am learning about and discussing how to discontinue dialysis with my line**

Step 1	Patient	Nurse	Helper	Date
Prepare and wash back				
Disconnect				

**I am being supervised by staff**

Step 2	Patient	Nurse	Helper	Date
Prepare and wash back				
Disconnect				

**I am practising on my own with minimal supervision**

Step 3	Patient	Nurse	Helper	Date
Prepare and wash back				
Disconnect				

**I feel safe and confident to do this without direct supervision. I understand that by signing, I take responsibility for following my unit's procedure**

	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

	Signature	Print Name	Date
Qualified nurse			
Support staff			





## After my dialysis



**I dispose of lines and clean my dialysis machine following my unit procedure**

### **Dispose of equipment**

- I wear protection to keep myself & others safe following my unit procedure
- I remove my lines & dialyser from the machine and dispose of them

### **Clean machine & equipment**

- I disinfect my machine
- I clean my machine & equipment following my unit procedure
- I understand why this is important
- I clean my hands

### **Record Observations**

- I record my weight & observations
- I inform staff if my observations are not within my normal range





# After my dialysis



## I am learning about and discussing action I take after dialysis

Step 1	Patient	Nurse	Helper	Date
Dispose of equipment				
Clean machine				
Record observations				

## I am being supervised by staff

Step 2	Patient	Nurse	Helper	Date
Dispose of equipment				
Clean machine				
Record observations				

## I am practising on my own with minimal supervision

Step 3	Patient	Nurse	Helper	Date
Dispose of equipment				
Clean machine				
Record observations				



## After my dialysis



**I feel safe and confident to do this without direct supervision.  
I understand that by signing, I take responsibility for following  
my unit's procedure**

	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

	Signature	Print Name	Date
Qualified nurse			
Support staff			





## Giving my Erythropoietin injection



**I prepare and give my erythropoietin injection following my unit procedure**

### Hand cleaning

- I clean my hands following my unit procedure
- **I have completed this competency**

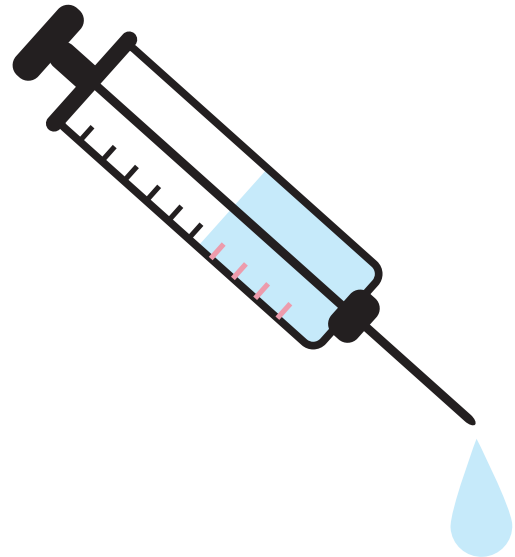
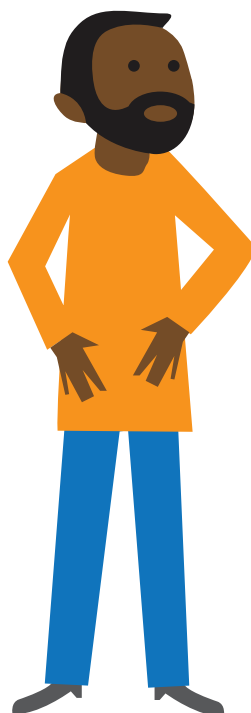


### Prepare equipment

- I check my injection against my prescription
- I understand why I need to check

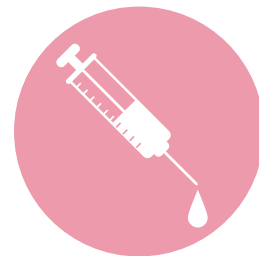
### Give injection

- I give my injection following my unit procedure





# Giving my Erythropoietin injection



**I am learning about and discussing how to give my erythropoietin injection**

Step 1	Patient	Nurse	Helper	Date
Prepare and check				
Give injection				

**I am being supervised by staff**

Step 2	Patient	Nurse	Helper	Date
Prepare and check				
Give injection				

**I am practising on my own with minimal supervision**

Step 3	Patient	Nurse	Helper	Date
Prepare and check				
Give injection				

**I feel safe and confident to do this without direct supervision. I understand that by signing, I take responsibility for following my unit's procedure**

	Signature	Print Name	Date
Patient			
Helper			

**In my opinion, a safe level of practice has been achieved in this section**

	Signature	Print Name	Date
Qualified nurse			
Support staff			





---

The patient competency handbook was originally adapted from material developed by Guys and St Thomas Hospitals and used by the Yorkshire and Humber Sharing Haemodialysis Care programme 2012. This version 2 has been created following extensive use and revised and trialled by staff participating in Shared Haemodialysis Care and the ShareHD collaborative 2018. With thanks also to our partners supporting Shared Care including Kidney Care UK and the Health Foundation.

---

Contact: [tania.barnes@sth.nhs.uk](mailto:tania.barnes@sth.nhs.uk)  
for further information on shared haemodialysis care training or resources



**SHAREHD**

A Quality Improvement Collaborative to scale up Shared Haemodialysis Care in centre based haemodialysis patients



**The  
Health  
Foundation**