

Donor selection, screening and deferral

Standard operating procedure (SOP) | BLD-SOP-001

Document type	Standard operating procedure (SOP)
Title	Donor selection, screening and deferral
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Prepared by	{{roles.quality_lead.name}}, Quality lead
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Approver and signature	{{roles.clinical_director.name}}, Clinical director Signature: _____ Date: _____
Effective date	{{document.effective_date}}
Next review	{{document.review_date}} (12 months, or sooner after any incident or change)
Replaces	None (new document)
Standards and criteria supported	Standard 5 (Blood Bank), criterion 5.1
Evidence basis	E-006, E-009
Status of this document	Recommended best-practice model. A hospital may adopt, adapt or replace it with an equivalent that meets the same criteria.

At a glance: what to do

1. Each donor is screened by the written questionnaire and the examination before donation.
2. A donor who does not meet the criteria is deferred.
3. Every deferral is recorded with its reason and the time to return.
4. Donors are told in a way they understand.

Stop and get help straight away if: a donation is taken from a donor who has not been screened, or a deferral is not recorded.

1. Purpose

To make sure only suitable donors give blood, and that every decision is recorded (5.1).

2. Scope

Applies to	Clinical and support staff in the hospital
Locations	All wards, clinics and departments of {{facility.legal_name}}
When	Whenever the activity described is carried out
Does not apply to	Activities covered by another document listed in section 15

3. Definitions and abbreviations

Term	Meaning in this SOP
Clinical lead	The doctor or nurse in charge of the area at the time

4. Background and rationale

To make sure only suitable donors give blood, and that every decision is recorded (5.1).

5. Responsibilities

Role	Duties in this SOP	Competence needed
Donor clinician	Screens each donor and decides on deferral	Clinician
Donor nurse	Records the screening and the deferral	Nurse

6. Equipment, materials and resources

Item	Specification or standard	Check before use
Records and forms named in this document	Current version	Checked before use

7. Safety and infection prevention

- Stop and call for help if a patient is at immediate risk. Do not delay urgent care to complete paperwork.

8. Before you start

- Confirm the forms and equipment named in this document are available and current.

9. Procedure

Follow the steps in order. Where a step says "If", take the action for the case that applies. Do not skip a step. If a step cannot be done, use section 11 and section 12.

Step	Action	How to do it	Key point
1	Screen.	• Complete the donor questionnaire and examination before each donation (BLD-FRM-001).	Every donation, every donor.
2	Decide.	• Defer any donor who does not meet the criteria, and record the reason and the return date.	Deferral is a safety decision.
3	Tell.	• Explain the deferral to the donor in a language they understand, and offer advice where needed.	The donor understands.

Decision points

- No decision points in this procedure.

10. Special situations

Situation	What to do
Out of hours	Follow the same steps. Use the on-call contact on the wall of the area.

11. Problems and escalation

- Any serious problem goes to the duty clinical lead at once and to the clinical director the same day.

12. Monitoring and compliance

What is checked	Target	How often	Who	If the target is missed
Donations with completed screening	100%	Monthly	Blood bank director	Escalate to governing body
Deferrals with reason recorded	100%	Monthly	Blood bank director	Escalate to governing body

13. Records

Record	Where it is kept	Kept for
Record named in this document	Patient record or the area file	{{facility.records_retention_years}} years

14. Training and competence

- Staff are trained in this document at induction and refreshed each year, with a recorded competency check.

15. Related documents

ID	Title	Relationship
BLD-FRM-001	Donor screening and deferral record	Record

16. Evidence

ID	Source and status
E-009	Donor criteria to follow the national blood service guidance. Based on the WHO framework for voluntary blood donation (2010).
E-006	ASF Policy Framework v1.2. Adapted.
E-009	ASF Expert Committee consensus.

EC = ASF Expert Committee consensus. Items marked EC are reviewed by the Committee each year.

17. Change history

Version	Date	What changed	Approver and signature
1.0	{{document.effective_date}}	First version	Pending Expert Committee approval