



# Optional Unit Content



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## Section 1: introduction

### Overview

This document is an extension of the Qualification Specification for the NCFE CACHE Level 3 Technical Occupational Entry in Senior Healthcare Support (Diploma) (610/3988/3) and contains the optional units for this qualification. The Optional Unit Content document must be used alongside the mandatory Qualification Specification as this contains generic information that is not repeated in the Optional Unit Content document. Both documents can be found on the qualification's page on the NCFE website.

Please ensure you check the rule of combination (RoC) for your chosen qualification using the Qualification Specification.

### Support Handbook

The Qualification Specification and Optional Unit Content document must be used alongside the mandatory Support Handbook, which can be found on the NCFE website. This contains additional supporting information to help with the planning, delivery and assessment.

The Qualification Specification and Optional Unit Content document contain all of the qualification-specific information you will need that is not covered in the Support Handbook.

### Reproduction of this document

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### Other support materials

The resources and materials used in the delivery of this qualification must be age-appropriate and due consideration should be given to the wellbeing and safeguarding of learners in line with your institute's safeguarding policy when developing or selecting delivery materials.



## Section 2: optional unit content and assessment guidance

This section provides details of the structure and content of the Theatre Support optional units for this qualification.

The types of evidence listed are for guidance purposes only. Within learners' portfolios, other types of evidence are acceptable if all learning outcomes (LOs) are covered, and if the evidence generated can be internally and externally quality assured. For approval of methods of internal assessment other than portfolio building, please contact your external quality assurer (EQA).



## THEA 1 Perform the non-scrubbed circulating role for perioperative procedures (R/651/0840)

Unit summary				
This unit is aimed at those who work in a non-scrubbed role to support perioperative teams during perioperative procedures. Learners will have the opportunity to develop knowledge, understanding and skills to maintain the sterile field and work safely with medical devices and equipment that underpin practice.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 3	4 credits	28 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand how to perform the non-scrubbed <b>circulating role</b> for perioperative procedures in line with policies, protocols and good practice	1.1 Explain <b>standard precautions</b> used for the provision and monitoring of medical equipment, devices and items
	1.2 Explain potential consequences of not following these standard precautions
	1.3 Explain local systems and protocols for team time out, sign out and debriefing
	1.4 Explain local policies and procedures regarding the correct handling of contaminated items
	1.5 Describe how to avoid compromising the <b>sterile field</b>
	1.6 State the procedures that must be followed when there is a breakdown in the sterile field
	1.7 State how to dispose of contaminated or potentially hazardous waste in line with local and national policies and protocols
2. Be able to perform the non-scrubbed circulating role for perioperative procedures in line with policies, protocols and good practice	2.1 Apply standard precautions used for the provision and monitoring of medical equipment, devices and items
	2.2 Apply local systems and protocols for team time out, sign out and debriefing
	2.3 Demonstrate local policies and procedures regarding the correct handling of contaminated items
	2.4 Dispose of contaminated or potentially hazardous waste in line with local and national policies and protocols
3. Know how medical devices are used for surgical interventions	3.1 State the purpose and function of medical devices used for surgical interventions
	3.2 Identify potential hazards of medical devices
	3.3 Describe the suitability of different types of surgical instrumentation for different procedures
	3.4 Identify the equipment to be used for weighing swabs and counting instruments
	3.5 Explain the actions to be taken when there is a problem with a medical device
	3.6 Explain potential consequences of not following procedures



Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
4. Be able to work with medical devices and equipment for clinical procedures in accordance with requirements	4.1 Apply standard precautions for infection control
	4.2 Implement health and safety measures relevant to the procedure and environment
	4.3 Obtain, prepare and position medical devices and equipment in line with local policies and protocols
	4.4 Use, care for and store medical devices and equipment in line with manufacturers' instructions and local policies and protocols
	4.5 Monitor and count surgical instruments, swabs and sharps with the <b>appropriate person</b> in line with national and local policies and protocols
	4.6 Maintain tracking and traceability requirements for sterile items
	4.7 Dispose of clinical and hazardous waste safely, according to local policies and protocols

Range
1. Understand how to perform the non-scrubbed circulating role for perioperative procedures in line with policies, protocols and good practice
<b>LO1 Circulating role:</b>  Someone in a clinical role assisting the practitioner during perioperative procedures.  <b>1.1 Standard precautions:</b>  The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.  <b>1.5 Sterile field:</b>  A specified area that is considered free of viable micro-organisms. This is often an area immediately around an individual that has been prepared for a surgical procedure. The sterile field includes the scrubbed team members and all furniture and fixtures in the area.
4. Be able to work with medical devices and equipment for clinical procedures in accordance with requirements
<b>4.5 Appropriate person:</b>  The designated member of the team responsible for counting the surgical instruments.

Delivery and assessment guidance
This unit must be assessed in line with Skills for Health assessment principles.  LO2 and LO4 must be assessed in a real work environment (RWE).  Relationship to National Occupational Standards (NOS):  • SFHPCS24



## THEA 2 Receive and handle clinical specimens within the sterile field (T/651/0841)

Unit summary				
This unit is aimed at those who work in a scrubbed role to receive and handle clinical specimens. Learners will have the opportunity to develop the ability to receive and handle clinical specimens within the sterile field.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 3	4 credits	30 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand how to receive and handle clinical specimens within the sterile field in line with health and safety guidance	1.1 Identify different types of specimens received and handled within the perioperative environment
	1.2 State requirements for handling and transporting both frozen and non-frozen clinical specimens to ensure their condition is maintained
	1.3 Identify different types and uses of container and transport media in the perioperative environment
	1.4 Explain the potential consequences of poor practice related to handling, labelling and transporting clinical specimens
	1.5 Explain how to deal with hazards associated with receiving and handling clinical specimens
	1.6 Explain the consequences of the contamination of clinical specimens
2. Be able to receive and handle clinical specimens within the sterile field	2.1 Apply <b>standard precautions</b> for infection control
	2.2 Implement health and safety measures relevant to handling clinical specimens
	2.3 Obtain <b>valid consent</b> to collect clinical specimens
	2.4 Confirm correct container and transport medium for the type of clinical specimen being collected
	2.5 Receive specimens in line with local policies and procedures
	2.6 Maintain the <b>sterile field</b> when passing specimens to the <b>appropriate person</b>
	2.7 Ensure specimens are labelled and documentation has been completed in line with local policies and procedures
	2.8 Process and dispatch clinical specimens in line with local policies and procedures

Range
2. Be able to receive and handle clinical specimens within the sterile field
2.1 <b>Standard precautions:</b>
The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.



### Range

#### 2.3 Valid consent:

Must be in line with agreed UK country definition and could include:

- the individual must have the mental capacity to make the decision
- the individual must have sufficient unbiased information to make an informed choice
- the individual must not be pressured into making a decision and must give consent freely

#### 2.6 Sterile field:

A specified area that is considered free of viable micro-organisms. This is often an area immediately around an individual that has been prepared for a surgical procedure. The sterile field includes the scrubbed team members and all furniture and fixtures in the area.

#### 2.6 Appropriate person:

This could be someone senior who has responsibility for receiving and processing specimens.

### Delivery and assessment guidance

This unit must be assessed in line with Skills for Health assessment principles.

LO2 must be assessed in a real work environment (RWE).

Relationship to National Occupational Standards (NOS):

- SFHPCS17





## THEA 3 Prepare anaesthetic environment and provide support for pre- and post-operative anaesthesia and recovery (Y/651/0842)

Unit summary				
This unit equips learners within the anaesthetic/recovery environment with knowledge about health and safety measures and the parameters for clinical readings, as well as competence in the preparation of equipment and the care of individuals. This involves a degree of autonomy and responsibility.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 3	5 credits	41 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand health and safety measures specific to carrying out activities in the anaesthetic/recovery environment	1.1 Explain the <b>standard precautions</b> required for preparing the anaesthetic/recovery environment and the potential consequences of poor practice
	1.2 Explain the importance of wearing personal protective equipment (PPE) in the anaesthetic/recovery environment
	1.3 Explain the importance of using equipment in line with manufacturers' instructions and local policies and protocols
	1.4 Explain the importance of maintaining stock of: <ul style="list-style-type: none"> <li>• disposables</li> <li>• fluids</li> <li>• linen</li> </ul>
	1.5 Explain local systems and protocols for team briefing and patient sign in
	1.6 Explain systems and protocols for completing pre- and post-operative checklists
	1.7 Explain how to recognise and <b>respond</b> to clinical emergencies, and how to provide support to the registered practitioner in these emergencies
2. Understand the parameters for clinical readings taken in the anaesthetic/recovery environment	2.1 Identify the normal parameters for temperature, pulse, blood pressure, respiration, oxygen levels and urinary output
	2.2 Explain how to measure an <b>individual's</b> temperature, blood pressure, respiration, oxygen levels and urinary output
	2.3 Explain how anaesthesia may affect an individual's temperature, pulse, blood pressure, respiration, oxygen levels and urinary output
	2.4 Explain common adverse reactions an individual may experience related to anaesthetic and recovery care
	2.5 Explain the importance of reporting any issues beyond own competence in accordance with local policies and protocols



Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
3. Be able to prepare and maintain anaesthetic/recovery equipment for the reception of individuals	3.1 Implement health and safety measures relevant to anaesthetic/recovery equipment
	3.2 Apply standard precautions for infection control
	3.3 Ensure equipment and documentation is available for the registered practitioner
	3.4 Document and report any equipment that is unfit for use according to local policies and protocols
	3.5 Clean reusable equipment in line with local policies and protocols
	3.6 Dispose of single-use equipment and waste according to local policies and protocols
	3.7 Maintain the stock of disposables/fluids/linen
4. Be able to assist the registered practitioner in caring for an individual in the anaesthetic/recovery environment	4.1 Confirm the individual's identity and gain <b>valid consent</b>
	4.2 Complete pre- and post-operative checklists
	4.3 Maintain the individual's privacy, dignity and comfort when the individual is transferred and received into the anaesthetic/recovery environment
	4.4 Work within own sphere of competence, recognising when to refer on issues
	4.5 Use verbal and non-verbal skills to support individuals, prior to and after anaesthesia/sedation, overcoming any possible communication difficulties
	4.6 Support the registered practitioner in the assessment, management and reassurance of the individual in the anaesthetic/recovery environment
	4.7 Monitor the individual as delegated by the registered practitioner in accordance with the care plan
	4.8 Measure and record clinical observations, reporting any deviation from normal parameters to the registered practitioner
	4.9 Record information in line with local policies and protocols

Range
1. Understand health and safety measures specific to carrying out activities in the anaesthetic/recovery environment
<b>1.1 Standard precautions:</b>  The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.
<b>1.7 Respond:</b>  Raise the alarm and start emergency procedures.
2. Understand the parameters for clinical readings taken in the anaesthetic/recovery environment
<b>2.2 Individual:</b>  Refers to someone requiring care or support; it will usually mean the person or people supported by the learner. Individuals may be neonates, infants, children, young people or adults.



### Range

**4.** Be able to assist the registered practitioner in caring for an individual in the anaesthetic/recovery environment

#### **4.1 Valid consent:**

Must be in line with agreed UK country definition and could include:

- the individual must have the mental capacity to make the decision
- the individual must have sufficient unbiased information to make an informed choice
- the individual must not be pressured into making a decision and must give consent freely

### Delivery and assessment guidance

This unit must be assessed in line with Skills for Health assessment principles.

LO3 and LO4 must be assessed in a real work environment (RWE).

Relationship to National Occupational Standards (NOS):

- SFHPCS25



## THEA 4 Contribute to the safe use of medical devices in the perioperative environment (A/651/0843)

Unit summary				
This unit is aimed at those whose responsibility it is to ensure medical devices in the perioperative environment are safe for use. Learners will have the opportunity to consolidate safe working practices, which are underpinned by an understanding of sterile practices and fields within the perioperative environment.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 2	4 credits	29 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand the importance of following health and safety requirements when using medical devices in the perioperative environment	1.1 Explain how <b>sterile fields</b> are maintained in the perioperative environment
	1.2 Describe the sterilisation processes used for <b>medical devices</b>
	1.3 Explain the role of <b>traceability systems</b> and recording mechanisms in health and safety
	1.4 Explain the importance of compliance with specific organisational health and safety policies and procedures for medical devices
	1.5 Explain the implications of non-compliance with organisational health and safety policies and procedures
	1.6 Describe how to sort and dispose of medical devices and waste materials in line with local policies and protocols
	1.7 Identify different types of waste and spillage and how to dispose of them
2. Be able to check and handle medical devices in the perioperative environment, according to health and safety procedures	2.1 Apply <b>standard precautions</b> for infection control
	2.2 Implement health and safety measures relevant to handling medical devices
	2.3 Follow procedures for ensuring medical devices are fit for purpose
	2.4 Follow procedures for the use, rotation and storage of medical devices
	2.5 Document and report any shortage of supplies according to local policy and protocol
3. Be able to check the integrity of instrument trays	3.1 Check and confirm the integrity and expiry dates of instrument packs prior to use
	3.2 Confirm instrument trays contain the specified items before and after use and record in line with local policies and procedures
	3.3 Follow tracking and traceability procedures for the safe use of instrument trays
	3.4 Implement the correct procedures for locating and replacing missing items from instrument trays
	3.5 Record and report missing items to the appropriate person in line with local policies and procedures
	3.6 Identify, record and report any faulty equipment, instruments or soft pack items to the appropriate team member



Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
4. Be able to dispose of used items and equipment safely	4.1 Dispose of single-use equipment in line with local policies and protocols
	4.2 Ensure items for decontamination and sterilisation are processed in accordance with local policies and protocols
	4.3 Ensure empty pack containers, trays and used medical devices are placed in the appropriate location for collection

Range
<p><b>1.</b> Understand the importance of following health and safety requirements when using medical devices in the perioperative environment</p> <p><b>1.1 Sterile fields:</b></p> <p>A specified area that is considered free of viable micro-organisms. This is often an area immediately around an individual that has been prepared for a surgical procedure. The sterile field includes the scrubbed team members and all furniture and fixtures in the area.</p> <p><b>1.2 Medical devices</b> could include:</p> <ul style="list-style-type: none"> <li>• medical products</li> <li>• equipment</li> <li>• packs</li> </ul> <p><b>1.3 Traceability systems</b> could include:</p> <p>Those designed to provide:</p> <ul style="list-style-type: none"> <li>• evidence of the sterility of sterile surgical instruments</li> <li>• a tracing system through the cleaning, packing and sterilisation processes</li> <li>• information regarding which individual the equipment was used by for traceability of waste</li> </ul> <p><b>2.</b> Be able to check and handle medical devices in the perioperative environment, according to health and safety procedures</p> <p><b>2.1 Standard precautions:</b></p> <p>The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.</p>

Delivery and assessment guidance
<p>This unit must be assessed in line with Skills for Health assessment principles.</p> <p>LO2, LO3 and LO4 must be assessed in a real work environment (RWE).</p> <p>Relationship to National Occupational Standards (NOS):</p> <ul style="list-style-type: none"> <li>• SFHPCS2</li> </ul>



## THEA 5 Provide support to the surgical team when preparing individuals for operative and invasive procedures (D/651/0844)

Unit summary				
This unit is aimed at those who support the surgical team when preparing individuals for operative and invasive procedures. Learners will have the opportunity to develop knowledge, understanding and skills related to preparing individuals, and selecting, handling and disposing of surgical instruments and supplementary items.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 3	4 credits	32 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand how to prepare individuals for operative and invasive procedures in line with national guidelines, policies, protocols and good practice	1.1 Explain how to apply <b>standard precautions</b> to the preparation of <b>individuals</b> for operative and invasive procedures
	1.2 Explain the importance of applying standard precautions to the health and safety of individuals
	1.3 Identify potential sources of contamination when preparing individuals for operative and invasive procedures
	1.4 Explain dangers of reusing single-use equipment
2. Understand the factors to be considered in the choice of surgical instruments and supplementary items during operative procedures	2.1 Identify types, purposes and functions of surgical instruments and supplementary items used in the surgical environment
	2.2 Describe potential hazards of using surgical instruments and ways to minimise the risk of harm
	2.3 Explain factors affecting the choice of surgical instruments and supplementary items
	2.4 Identify cost implications of items used during surgical procedures
	2.5 Explain the impact of cost implications on the commissioning of services
	2.6 Identify factors that inform the choice of sites for attachment of surgical instruments
	2.7 Explain how different types of skin preparation agents and surgical drapes are used in the surgical environment to provide barriers to cross infection
3. Be able to assist in the preparation of an individual for operative and invasive procedures	3.1 Confirm the individual's identity and gain <b>valid consent</b>
	3.2 Apply standard precautions for infection prevention and control
	3.3 Implement health and safety measures relevant to the procedure and environment
	3.4 Identify the individual's operative site, clarifying any queries with the <b>appropriate person</b>
	3.5 Support others to prepare the individual for an operative or invasive procedure, maximising their dignity, comfort and safety



Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
4. Be able to select, handle and dispose of surgical instruments and supplementary items for operative and invasive procedures	4.1 Select and handle surgical instruments and supplementary items safely and in line with the manufacturers' instructions
	4.2 Select an appropriate site in the <b>sterile field</b> for attaching surgical instruments and supplementary items
	4.3 Account for and record all items and swabs used in the preparation of the operative site in line with local policies and protocols
	4.4 Dispose of waste in line with local policies and protocols

Range
<p>1. Understand how to prepare individuals for operative and invasive procedures in line with national guidelines, policies, protocols and good practice</p> <p><b>1.1 Standard precautions:</b></p> <p>The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.</p> <p><b>1.1 Individuals:</b></p> <p>Refers to someone requiring care or support; it will usually mean the person or people supported by the learner. Individuals may be neonates, infants, children, young people or adults.</p>
<p>3. Be able to assist in the preparation of an individual for operative and invasive procedures</p> <p><b>3.1 Valid consent:</b></p> <p>Must be in line with agreed UK country definition and could include:</p> <ul style="list-style-type: none"> <li>the individual must have the mental capacity to make the decision</li> <li>the individual must have sufficient unbiased information to make an informed choice</li> <li>the individual must not be pressured into making a decision and must give consent freely</li> </ul> <p><b>3.4 Appropriate person:</b></p> <p>This could include someone in a senior position who has overall responsibility for overseeing and/or directing the preparation of a pre-operative individual.</p>
<p>4. Be able to select, handle and dispose of surgical instruments and supplementary items for operative and invasive procedures</p> <p><b>4.2 Sterile field:</b></p> <p>A specified area that is considered free of viable micro-organisms. This is often an area immediately around an individual that has been prepared for a surgical procedure. The sterile field includes the scrubbed team members, and all furniture and fixtures in the area.</p>

Delivery and assessment guidance
<p>This unit must be assessed in line with Skills for Health assessment principles.</p> <p>LO3 and LO4 must be assessed in a real work environment (RWE).</p>



### **Delivery and assessment guidance**

Relationship to National Occupational Standards (NOS):

- SFHPCS15





## THEA 6 Assist in receiving, handling and dispatching clinical specimens (F/651/0845)

Unit summary				
This unit is aimed at those who assist others to receive, handle and dispatch clinical specimens. Learners will have the opportunity to develop knowledge, understanding and skills related to the use of appropriate containers and transport methods, while ensuring precautions related to infection control are upheld.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 2	2 credits	17 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand how health and safety measures are implemented when receiving, handling and dispatching clinical specimens	1.1 Explain how the <b>standard precautions</b> for infection control apply when receiving, handling and dispatching specimens
	1.2 Describe how to avoid compromising the <b>sterile field</b>
	1.3 Outline the actions to take when there is a breakdown in the sterile field
2. Understand reasons for using different containers and transport media for different clinical specimens	2.1 Identify different types and uses of containers and transport media used in the perioperative environment
	2.2 Explain differences between the types of specimens and how these are received, handled and dispatched
	2.3 Explain potential consequences of failing to follow procedure when handling, labelling and dispatching clinical specimens
3. Be able to assist others to receive, handle, label and dispatch clinical specimens	3.1 Apply standard precautions for infection control
	3.2 Implement health and safety measures relevant to handling clinical specimens
	3.3 Use the correct container and transport medium for the type of specimen as directed by the <b>appropriate person</b>
	3.4 Receive, handle, label, dispatch and record information on specimens in line with local policies and protocols as directed by the appropriate person
	3.5 Notify the appropriate person of any queries relating to clinical specimens that are beyond own competence
	3.6 Update records in line with local policies and protocols

Range
1. Understand how health and safety measures are implemented when receiving, handling and dispatching clinical specimens
<b>1.1 Standard precautions:</b>
The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.



### Range

#### 1.2 Sterile field:

A specified area that is considered free of viable micro-organisms. This is often an area immediately around an individual that has been prepared for a surgical procedure. The sterile field includes the scrubbed team members and all furniture and fixtures in the area.

3. Be able to assist others to receive, handle, label and dispatch clinical specimens

#### 3.3 Appropriate person:

This could include registered practitioners or other colleagues.

### Delivery and assessment guidance

This unit must be assessed in line with Skills for Health assessment principles.

LO3 must be assessed in a real work environment (RWE).

Relationship to National Occupational Standards (NOS):

- SFHPCS10



## THEA 7 Transport, transfer and position individuals and equipment within the perioperative environment (H/651/0846)

Unit summary				
This unit is aimed at those who transfer, transport and position individuals in a perioperative environment. Learners will have the opportunity to develop knowledge, understanding and skills needed to avoid musculoskeletal injury to staff and tissue damage to the individual.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 3	5 credits	32 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand the importance of health and safety measures when transporting, transferring and positioning individuals and equipment in the perioperative care environment	1.1 Explain the standard health and safety precautions used when moving, handling and transporting individuals and equipment
	1.2 Explain potential consequences if the standard health and safety precautions are not applied when moving, handling and transporting individuals and equipment
	1.3 Explain safe techniques and procedures used for moving and positioning individuals and equipment in the perioperative environment, according to local and organisational policies and procedures
	1.4 Explain the importance of using personal protective equipment (PPE)
	1.5 Identify situations when additional protective equipment may be required
2. Understand the requirements for pressure area care in the perioperative environment	2.1 Explain how to contribute to the maintenance of individuals' skin integrity in the perioperative environment
	2.2 Explain how to use risk assessment documents for pressure area care during transfers and positioning
	2.3 Explain the importance of using appropriate equipment to minimise the risk of tissue damage
	2.4 Explain the importance of recording and reporting using the appropriate documents in line with local policies and protocols
3. Be able to prepare to transport individuals within the perioperative care environment	3.1 Identify the nature of the task required in discussion with the <b>appropriate person</b> /registered practitioner
	3.2 Apply <b>standard precautions</b> for infection control
	3.3 Implement health and safety measures relevant to transporting individuals within the perioperative care environment
	3.4 Check that the transport equipment is clean, safe and functioning in line with local policies and protocols
	3.5 Report any potential hazards to the appropriate team member
	3.6 Identify the individual who needs to be moved
	3.7 Inform the individual of the nature and purpose of the transfer and the role of people involved
	3.8 Confirm that any required documents are available to accompany the individual



<b>Learning outcomes (LOs)</b> The learner will:	<b>Assessment criteria (AC)</b> The learner can:
4. Be able to assist in the transfer and positioning of individuals within the perioperative environment	4.1 Use safe moving and handling techniques that minimise risk to all involved, including pain, friction and discomfort for those being moved
	4.2 Transfer and position individuals according to instructions, confirming they are positioned safely, comfortably and in accordance with guidelines
	4.3 Maintain the privacy, dignity, safety, security and comfort of individuals while using equipment for transfer and positioning
	4.4 Identify the effects of premedication and anaesthesia on the ability of individuals to move independently
	4.5 Use verbal and non-verbal skills to support individuals, closely observing and reporting any changes in condition to the appropriate team member
	4.6 Transfer the individual and their associated documentation over to the appropriate member of staff in the perioperative environment
	4.7 Return equipment to the correct location in good working order

<b>Range</b>
<b>3. Be able to prepare to transport individuals within the perioperative care environment</b>
<b>3.1 Appropriate person:</b>  This could include registered practitioners or other colleagues.  <b>3.2 Standard precautions:</b>  The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.

<b>Delivery and assessment guidance</b>
This unit must be assessed in line with Skills for Health assessment principles.  LO3 and LO4 must be assessed in a real work environment (RWE).  Relationship to National Occupational Standards (NOS): <ul style="list-style-type: none"> <li>• SFHPCS1</li> <li>• SFHPCS23</li> </ul>



## THEA 8 Measure and record individuals' body fluid balance in a perioperative environment (J/651/0847)

Unit summary				
This unit is aimed at those who measure, record and review individuals' fluid balance within the perioperative environment. This unit provides an opportunity to develop understanding of the procedures that underpin measuring an individual's fluid balance, and the importance of doing so.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 3	4 credits	23 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand safe procedures relating to measuring and recording individuals' fluid balance in a perioperative environment	1.1 Describe the purposes of measuring an <b>individual's</b> fluid balance and wound drainage
	1.2 Describe factors that affect fluid input, output and wound drainage
	1.3 Explain potential hazards associated with measuring an individual's body fluids and wound drainage
	1.4 Describe adverse circumstances related to measuring and recording an individual's fluid balance that would require immediate reporting
	1.5 Describe organisational policies and procedures on correct disposal of single-use equipment and other hazardous waste
	1.6 Identify equipment used for measuring fluid balance and wound drainage
	1.7 Explain the organisational policies and procedures for reporting and recording faulty equipment
	1.8 Explain why it is important to work within own sphere of competence
2. Be able to measure, record and review an individual's body fluid balance in a perioperative environment	2.1 Confirm the individual's identity and gain <b>valid consent</b>
	2.2 Apply <b>standard precautions</b> for infection control
	2.3 Implement health and safety measures relevant to recording an individual's body fluid balance when carrying out this task
	2.4 Measure the individual's fluid input, output and wound drainage using equipment in line with local policy and protocol
	2.5 Record the individual's body fluid balance in line with local policy and protocol
	2.6 Identify the difference between body fluid and other fluids
	2.7 Review fluid balance measurements in line with local policy and protocol
	2.8 Explain why it is necessary to report any problems in measuring or recording the individual's fluid balance in line with local policy and protocol
	2.9 Report results in line with local policy and protocol
3. Be able to manage equipment after measuring an individual's body fluid balance	3.1 Clean reusable equipment after use, using the correct materials in line with local policy and protocols
	3.2 Return equipment to the storage or collection location



Range
<p><b>1.</b> Understand safe procedures relating to measuring and recording individuals' fluid balance in a perioperative environment</p>
<p><b>1.1 Individual:</b></p> <p>Refers to someone requiring care or support; it will usually mean the person or people supported by the learner. Individuals may be neonates, infants, children, young people or adults.</p>
<p><b>2.</b> Be able to measure, record and review an individual's body fluid balance in a perioperative environment</p>
<p><b>2.1 Valid consent:</b></p> <p>Must be in line with agreed UK country definition and could include:</p> <ul style="list-style-type: none"> <li>the individual must have the mental capacity to make the decision</li> <li>the individual must have sufficient unbiased information to make an informed choice</li> <li>the individual must not be pressured into making a decision and must give consent freely</li> </ul> <p><b>2.2 Standard precautions:</b></p> <p>The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.</p>

Delivery and assessment guidance
<p>This unit must be assessed in line with Skills for Health assessment principles.</p> <p>LO2 and LO3 must be assessed in a real work environment (RWE).</p> <p>Relationship to National Occupational Standards (NOS):</p> <ul style="list-style-type: none"> <li>SFHPCS6</li> </ul>



## THEA 9 Assist in the delivery of perioperative care and support to individuals (K/651/0848)

Unit summary				
This unit is aimed at those who support and monitor individuals in a perioperative environment, according to their care plan. The learner will develop their understanding of how the perioperative environment and procedures affect individuals' responses to clinical interventions.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 3	4 credits	24 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand the potential effects of the perioperative environment and procedures on individuals undergoing perioperative care	1.1 Explain the effects of premedication and sedation on the <b>individual</b> and how these affect support and monitoring requirements
	1.2 Explain the importance of ensuring the environment is suitable for the conscious/unconscious individual
	1.3 Identify factors in the perioperative environment and procedures that could cause stress and distress to the individual
	1.4 Describe signs of distress that may be exhibited by the individual in the perioperative environment and how these affect support requirements
2. Be able to support individuals in a perioperative environment according to their care plan	2.1 Use verbal and non-verbal communication to support the individual's comfort, privacy, dignity, emotional and physical care needs according to their care plan
	2.2 Communicate information in a way that is sensitive to the personal beliefs and <b>preferences</b> of the individual
	2.3 Respond to the individual's questions, referring on queries outside own sphere of competence, in accordance with local policy and protocol
	2.4 Provide support and care to the individual to promote their comfort in the perioperative environment
3. Be able to monitor individuals in a perioperative environment according to the requirements of their care plans	3.1 Explain the importance of closely monitoring the individual in the perioperative environment
	3.2 Identify any changes in and concerns about the individual's condition
	3.3 Seek advice about changes in and concerns about the individual's condition in line with local policy and protocol
	3.4 Record outcomes of monitoring activities in line with local policy and protocol
	3.5 Obtain and pass on relevant information on the individual's care requirements to other team members in line with local policy and protocol



Range
<p><b>1.</b> Understand the potential effects of the perioperative environment and procedures on individuals undergoing perioperative care</p> <p><b>1.1 Individual:</b></p> <p>Refers to someone requiring care or support; it will usually mean the person or people supported by the learner. Individuals may be neonates, infants, children, young people or adults.</p> <p><b>2.</b> Be able to support individuals in a perioperative environment according to their care plan</p> <p><b>2.2 Preferences</b> could include:</p> <ul style="list-style-type: none"> <li>• values</li> <li>• culture</li> <li>• aspirations</li> <li>• wishes</li> </ul>
Delivery and assessment guidance
<p>This unit must be assessed in line with Skills for Health assessment principles.</p> <p>LO2 and LO3 must be assessed in a real work environment (RWE).</p> <p>Relationship to National Occupational Standards (NOS):</p> <ul style="list-style-type: none"> <li>• SFHPCS5</li> <li>• SFHPCS7</li> </ul>





## THEA 10 Prepare and dress for scrubbed clinical roles (L/651/0849)

Unit summary				
This unit is aimed at those who work under direction from the perioperative team. Learners will have the opportunity to develop underpinning knowledge of the requirements involved in preparing and dressing for the scrubbed clinical role and be able to apply these to practice.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 2	4 credits	28 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand how to follow safe procedures when preparing and dressing for scrubbed clinical roles	1.1 Explain how national guidelines and local policies and protocols inform the selection and preparation of personal protective equipment (PPE)
	1.2 Explain what is meant by an aseptic environment and the <b>sterile field</b>
	1.3 Explain the importance of reporting any potential contamination in line with local policies and procedures
2. Understand how to dress for scrubbed clinical roles	2.1 Explain how to follow infection control procedures in preparation for the scrubbed clinical role
	2.2 Describe the factors that affect the choice of personal protective clothing for different procedures
	2.3 Explain the importance of wearing personal protective clothing for the scrubbed clinical role
	2.4 Explain why it is necessary to change PPE that has become unsuitable
3. Be able to work within scrubbed clinical roles	3.1 Apply <b>standard precautions</b> for infection control
	3.2 Implement health and safety measures relevant to scrubbed clinical roles
	3.3 Select and wear PPE in line with local policies and protocols
	3.4 Identify and maintain the sterile field by following theatre etiquette and protocols
	3.5 Dispose of used PPE appropriately
	3.6 Report any potential contamination in line with local policies and protocols

Range
1. Understand how to follow safe procedures when preparing and dressing for scrubbed clinical roles
1.2 Sterile field:
A specified area that is considered free of viable micro-organisms. This is often an area immediately around an individual that has been prepared for a surgical procedure. The sterile field includes the scrubbed team members, and all furniture and fixtures in the area.



### Range

**3.** Be able to work within scrubbed clinical roles

#### **3.1 Standard precautions:**

The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.

### Delivery and assessment guidance

This unit must be assessed in line with Skills for Health assessment principles.

LO3 must be assessed in a real work environment (RWE).

Relationship to National Occupational Standards (NOS):

- SFHPCS13



## THEA 11 Prepare and provide surgical instrumentation and supplementary items for the surgical team (T/651/0850)

Unit summary				
This unit is aimed at those who are responsible for preparing surgical instrumentation and supplementary items and making them available to the surgical team in a perioperative environment.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 3	6 credits	43 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand how to prepare and provide surgical instrumentation and items for the surgical team in line with health and safety procedures and protocols	1.1 Explain how the <b>sterile field</b> contributes to infection control in the operative setting
	1.2 Explain how to maintain the sterile field during surgical procedures and the actions to take if it is compromised
	1.3 Explain the types, purposes and functions of commonly used surgical instruments and the potential hazards associated with their use
	1.4 Describe common supplementary items and their use during surgery
	1.5 Explain the procedures for identifying and reporting problems with instruments and items during preparation and throughout the procedure
	1.6 Explain principles and techniques for counting instruments, sharps, swabs and supplementary items, and the importance of these principles and techniques
2. Be able to prepare surgical instruments and supplementary items for the surgical team	2.1 Apply standard precautions for infection control
	2.2 Maintain compliance with health and safety guidance at all times
	2.3 Check surgical instruments and supplementary items before preparation and confirm as being within expiry date, safe and fit for purpose
	2.4 Select and prepare required surgical instruments and supplementary items for the procedure
	2.5 Set up surgical instruments and supplementary items to meet the needs of the operative procedure and the <b>individual's</b> care plan
	2.6 Count and record instruments, sharps, swabs and supplementary items prior to commencing the procedure in line with local policies and protocols
3. Be able to provide surgical instruments and supplementary items for the surgical team	3.1 Handle instruments and supplementary items in line with local policies and protocols while maintaining the integrity of the sterile field
	3.2 Anticipate the needs of the surgical team by monitoring their activities and the placement of items within the surgical field
	3.3 Clarify any uncertainty over the requirements of the surgical team with the <b>appropriate person</b>
	3.4 Provide instrumentation and supplementary items to meet the needs of the surgical team and the individual's plan of care



<b>Learning outcomes (LOs)</b> The learner will:	<b>Assessment criteria (AC)</b> The learner can:
	3.5 Count and record instruments, sharps, swabs and supplementary items during the process, and prior to close and completion, in line with national and local policies and protocols 3.6 Inform the surgical team of instrument and supplementary item counts during the procedure in line with local policies and protocols
4. Be able to dispose of waste from the sterile field	4.1 Dispose of and transfer used instruments and supplementary items to the non-sterile area for accounting, tracking and traceability in line with local policies and protocols 4.2 Update records in line with national guidelines 4.3 Remove and dispose of drapes in line with local policies and protocols 4.4 Maintain the dignity of the individual throughout the procedure in line with local policies and protocols

<b>Range</b>
<b>1.</b> Understand how to prepare and provide surgical instrumentation and items for the surgical team in line with health and safety procedures and protocols
<b>1.1 Sterile field:</b>  A specified area that is considered free of viable micro-organisms. This is often an area immediately around an individual that has been prepared for a surgical procedure. The sterile field includes the scrubbed team members and all furniture and fixtures in the area.
<b>2.</b> Be able to prepare surgical instruments and supplementary items for the surgical team
<b>2.5 Individual:</b>  Refers to someone requiring care or support; it will usually mean the person or people supported by the learner. Individuals may be neonates, infants, children, young people or adults.
<b>3.</b> Be able to provide surgical instruments and supplementary items for the surgical team
<b>3.3 Appropriate person:</b>  This could include another member of the surgical team.

<b>Delivery and assessment guidance</b>
This unit must be assessed in line with Skills for Health assessment principles.  LO2, LO3 and LO4 must be assessed in a real work environment (RWE).  Relationship to National Occupational Standards (NOS): <ul style="list-style-type: none"> <li>• SFHPCS14</li> <li>• SFHPCS16</li> </ul>



## THEA 12 Prepare and apply dressings and drains to individuals in the perioperative environment (Y/651/0851)

Unit summary				
This unit is aimed at those in a scrubbed role who assist with the preparation and application of dressings, wound supports and drains.				
Assessment				
This unit is internally assessed via a portfolio of evidence.				
Optional	Achieved/not yet achieved	Level 2	2 credits	18 GLH

Learning outcomes (LOs) The learner will:	Assessment criteria (AC) The learner can:
1. Understand the health and safety measures related to preventing wound contamination and cross infection when preparing and applying dressings and drains	1.1 Explain the principles of asepsis, antisepsis and cross infection
	1.2 Identify potential sources of contamination when preparing surgical fields and how to prevent this
	1.3 Identify the types of pathogens commonly causing wound infection and the consequences of wound contamination
	1.4 Explain the principles of wound healing and wound care
	1.5 Identify the correct dressings and drains to suit the type and size of wound
2. Understand how medical devices are used in the application of dressings, wound supports and drains in the learner environment	2.1 Explain the purpose and function of medical devices used in the application of dressings and drains
	2.2 Describe potential hazards associated with the use of medical devices to apply dressings and drains
	2.3 Explain the factors that inform the choice of medical devices for the application of dressings and drains to <b>individuals</b>
	2.4 Explain the factors that inform the choice of sites for attaching medical devices
3. Be able to select and prepare dressings and drains according to individual requirements	3.1 Confirm the individual's identity and gain <b>valid consent</b>
	3.2 Give the individual information and reassure them when preparing to administer a dressing or drain
	3.3 Apply <b>standard precautions</b> for infection control
	3.4 Implement health and safety measures relevant to preparing dressings and drains
	3.5 Identify, through discussion with the individual, any allergies they may have that will affect the types of dressing used
	3.6 Select and prepare dressings to suit the size and type of wound and promote healing
	3.7 Prepare drains according to local policies and protocols
4. Be able to apply dressings and attach drains according to individual requirements	4.1 Apply the dressing or attach the drain to the individual in accordance with local policies and protocols
	4.2 Check that the dressing has been applied correctly, ensuring that: <ul style="list-style-type: none"> <li>the pressure is consistent with the type of wound</li> <li>drains are secure</li> <li>vacuum seals on the drains are intact</li> <li>the position of the drain prevents siphonage and/or harm to the individual</li> </ul>



<b>Learning outcomes (LOs)</b> The learner will:	<b>Assessment criteria (AC)</b> The learner can:
	4.3 Report any issues outside your own sphere of competence in line with local policy and protocol
	4.4 Update records in line with local policy and protocol

<b>Range</b>
<b>2.</b> Understand how medical devices are used in the application of dressings, wound supports and drains in the learner environment
<b>2.3 Individuals:</b>  Refers to someone requiring care or support; it will usually mean the person or people supported by the learner. Individuals may be neonates, infants, children, young people or adults.
<b>3.</b> Be able to select and prepare dressings and drains according to individual requirements
<b>3.1 Valid consent:</b>  Must be in line with agreed UK country definition and could include: <ul style="list-style-type: none"> <li>the individual must have the mental capacity to make the decision</li> <li>the individual must have sufficient unbiased information to make an informed choice</li> <li>the individual must not be pressured into making a decision and must give consent freely</li> </ul> <b>3.3 Standard precautions:</b>  The precautions considered sufficient to reduce the risk of harm or injury by transmission of pathogens.

<b>Delivery and assessment guidance</b>
<p>This unit must be assessed in line with Skills for Health assessment principles.</p> <p>LO3 and LO4 must be assessed in a real work environment (RWE).</p> <p>Relationship to National Occupational Standards (NOS):</p> <ul style="list-style-type: none"> <li>SFHPCS18</li> </ul>



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Version 1.0 August 2025

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## Appendix A: optional units

The units within this qualification cross over into the various occupational subject areas available and therefore do not follow the standard unit numbering of Unit 01, Unit 02, for example.

 Knowledge-only units are indicated by a star. If a unit is not marked with a star, it is a skills unit or contains a mix of knowledge and skills.

### Theatre Support optional units

Unit number	Regulated unit number	Unit title	Level	Credit	GLH	Notes
THEA 1	R/651/0840	Perform the non-scrubbed circulating role for perioperative procedures	3	4	28	
THEA 2	T/651/0841	Receive and handle clinical specimens within the sterile field	3	4	30	
THEA 3	Y/651/0842	Prepare anaesthetic environment and provide support for pre- and post-operative anaesthesia and recovery	3	5	41	
THEA 4	A/651/0843	Contribute to the safe use of medical devices in the perioperative environment	2	4	29	
THEA 5	D/651/0844	Provide support to the surgical team when preparing individuals for operative and invasive procedures	3	4	32	
THEA 6	F/651/0845	Assist in receiving, handling and dispatching clinical specimens	2	2	17	





Unit number	Regulated unit number	Unit title	Level	Credit	GLH	Notes
THEA 7	H/651/0846	Transport, transfer and position individuals and equipment within the perioperative environment	3	5	32	
THEA 8	J/651/0847	Measure and record individuals' body fluid balance in a perioperative environment	3	4	23	
THEA 9	K/651/0848	Assist in the delivery of perioperative care and support to individuals	3	4	24	
THEA 10	L/651/0849	Prepare and dress for scrubbed clinical roles	2	4	28	
THEA 11	T/651/0850	Prepare and provide surgical instrumentation and supplementary items for the surgical team	3	6	43	
THEA 12	Y/651/0851	Prepare and apply dressings and drains to individuals in the perioperative environment	2	2	18	

The units above may be available as stand-alone unit programmes. Please visit the NCFE website for further information.



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## Change history record

Version	Publication date	Description of change
v1.0	August 2025	First publication