

INTEGRATED URGENT CARE SERVICE DELIVERY UNIT

Call Audit Staging Process Workbook

V1.3

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1. Introduction

This Workbook forms part an integrated part of the management of and governance arrangements of the PC24 Call Quality Audit. The workbook procedures will ensure compliance with statutory requirements and best practice.

2. Purpose

Primary Care 24 Call Audit Process relates to all operational team members who receive calls via the Health Care Professional Line, make outbound calls to patients. The purpose of this document is to ensure that a robust and standardised staging process is produced to which all operational staff will be subject to.

The call audit is split into four stages, Stage 1 – Stage 4 and all operational team members, will be audited on a number of calls relevant to the stage they are currently assigned.

Operational staff team members who are within their six month probation period will be monitored with a probationary audit process, also described in this document

3. Guidelines

The following operational staff groups will be included in call audit:

- Shift Managers
- Senior Urgent Care Coordinator
- Urgent Care Coordinators
- Referral Coordinators
- Probationary Staff

4. Audit Process (stages)

Stage 1

- Staff member will be audited with one call every 14 days
- Staff member will be required to be compliant in parts A and B of the audit to remain at Stage 1
- For a staff member to be fully compliant in part A of the audit, staff are required to achieve, two or less minors or no majors within the call audited.
- For a staff member to be fully compliant in part B of the audit, staff are required to achieve a score of 89% or above.
- Once a staff member has reached stage 1 they will remain at this stage unless a non-compliant audit is recorded
- One non-compliant audit call will result in the staff member moving to Stage 2 of the call audit process.

Stage 2

- Staff member will be audited with one call every 7 days
- Staff member will be required to be compliant in parts A and B of the audit to remain at Stage 2
- For a staff member to be fully compliant in part A of the audit, staff are required to achieve, two or less minors or no majors within the call audited.
- For a staff member to be fully compliant in part B of the audit, staff are required to achieve a score of 89% or above.
- When a staff member scores one non-compliant audit they will remain on stage 2 however they will revert to the start of the process requiring four consecutive fully compliant audits to progress.
- When a staff member scores two non-compliant audits within a rolling four audited period, this will result in the staff member moving to Stage 3 of the audit Process.

Stage 3

- Staff member will be audited with two calls every 7 days
- Staff member will be required to be compliant in parts A and B of the audit to remain at Stage 3
- For a staff member to be fully compliant in part A of the audit, staff are required to achieve, two or less minors or no majors within the call audited.
- For a staff member to be fully compliant in part B of the audit, staff are required to achieve a score of 89% or above.
- When a staff member achieves eight consecutive fully compliant calls, this will result in moving to stage 2 of the audit process.
- When a staff member does not archive an overall compliance of 75%, this will result in the member moving to Stage 4 of the audit process.

Stage 4 – Informal Capability

- When entering Stage 4 of the Call Audit Process the staff member will have a one-to-one meeting with their Line Manager and the Training Manager. During the meeting they will be informed they are at the informal stage of capability and be provided with a copy of the Capability Policy.
- If it is the first time the staff member has entered into Stage 4 of the Audit Process they will receive ten hours of re-training with either an operational trainer or the call quality auditor.
- Re-training is split into two sections. For the first five hours the staff member will receive direct supervision and training. For the next five hours the staff member will receive indirect supervision and training.
- After successfully completing the ten hours training, the staff member will be required to complete and pass the Referral Coordinator Training assessment. Once completed, this will then be signed off by a Trainer, who will then authorise for the staff member to be able to return back to shift.

- Following the period of re-training, the staff member will be expected to handle at least four calls per 7 days.
- Staff member will then be audited with four calls every 7 days.
- Staff member will be required to be compliant in parts A and B of the audit to remain at Stage 4. For a staff member to be fully compliant in part A of the audit, staff are required to achieve, two or less minors or no majors within the call audited.
- For a staff member to be fully compliant in part B of the audit, staff are required to achieve a score of 89% or above.
- When a staff member achieves a minimum of 75% compliance for each week, over a 28 day period, they will revert to Stage 3 of the audit process.
- Failure to maintain at least 75% compliance for each week will result in a meeting with their line manager to review their performance and managed under Primary Care 24's Capability Policy. An action plan will be created and will be managed in the line with the capability policy.

Staff in training – Probationary Audits

- Staff member will receive eleven hours role specific training, based within a classroom with a member of the training team.(Appendix 1)
- The staff member will receive eight hours live call taking whilst buddied with a member of the training team.
- Following successful completion of the eight hours live call taking, the staff member will be required to complete the referral co-ordinator assessment with a member of the training team.
- After successfully completing the Referral Coordinator assessment, the staff member will undertake ten hours live call taking without a member of the training team.
- Four of these calls will be audited and the staff member will receive audit feedback.
- Staff member is required to achieve an overall compliance of 75% (three out of four calls audited)
- After successfully achieving 75% overall audit compliance, the staff member will undertake a further 10 hours live call taking without a member of the training team.
- A further four of these calls will be audited and the staff member will receive audit feedback
- Staff member to achieve an overall compliance of 75% (three out of four calls audited)
- Following success completion of the probationary training audit, the staff member will continue with Urgent Care Co-ordinator training.
Failure to maintain at least 75% compliance for each week of the probationary audits, will result in a meeting with their line manager to review their performance and probationary training.

Staff in 6month Probationary Period following successful completion of Training

- Staff member will be audited with two calls every 7 days.
- Staff member will be required to be compliant in parts A and B of the audit to remain at the probationary stage of the audit.
- For a staff member to be fully compliant in part A of the audit, staff are required to achieve, two or less minors or no majors within the call audited.
- For a staff member to be fully compliant in part B of the audit, staff are required to achieve a score of 89% or above.
- Staff member will progress to Stage 2 of the audit process, after successfully completing three out of six months of their probation period.
- Audit results within the first six months of employment will be considered as part of their probationary review
- Call Quality Auditor will escalate any performance issues to the Integrated Urgent Care service manager for immediate action
- If performance issues are deemed to affect patient safety, the staff member will be removed from shift and to meet with the Integrated Urgent Care service manager to discuss an action plan or potentially ending employment
- Monthly performance reports for each staff member in the first three months of their probation, will be provided to the appropriate line manager to monitor performance and provide evidence to support the probation review

Expected Call Volume per Staff Member

To ensure adequate audit levels can be maintained staff are expected to take the following amount of calls:

- Stage 1 and Stage 2 – At least one call per week. If the staff member only works one shift on an alternate week they will be expected to take one call each shift
- Stage 3 – At least two calls per week. If the staff member only works one shift on an alternate week they will be expected to take two calls each shift
- Stage 4 – At least four calls per week. If the staff member only works one shift on an alternate week they will be expected to take four calls each shift.

Staff Engagement

All completed call audits will be feedback back to staff members. This will be communicated via email or the staff member will be contacted, to be invited to attend a face to face meeting held with the Call Quality Auditor or IUC Service Manager.

Appeal Process

Staff members have the right to appeal, non-compliant calls audited. Appeals are to be in writing to the IUC Service Manager, stating their grounds for appeal within 10 working days of the date of the audit feedback sent. The IUC service manager then has 10 working days to respond, with a meeting held to discuss call audit.

Appendix 1

Urgent Care Coordinator Training Plan

Week 1

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
09:00 - 09:59		Welcome / Role Overview	E-learning	ACPP / TR & INT Workshop		Call taking	
10:00 - 10:59		SOPs / Policies / Intranet		Case Entry Practical			
11:00 - 11:59		Rotamaster					
12:00 - 12:59		Datix G/S	Call Audit Workshop				
13:00 - 13:59		LUNCH	LUNCH				
14:00 - 14:59		E-Learning	ILTC Workshop				
15:00 - 15:59							
16:00 - 16:59			Adastra Demo				
17:00 - 17:59							
18:00 - 18:59					Call Taking		
19:00 - 19:59							
20:00 - 20:59							
RESPONSIBILITY		Trainer	Trainer	Trainer	Buddy	Buddy	

Week 2

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
09:00 - 09:59							Call Taking
10:00 - 10:59							
11:00 - 11:59							
12:00 - 12:59							
13:00 - 13:59							
14:00 - 14:59						Call Taking	
15:00 - 15:59							
16:00 - 16:59							
17:00 - 17:59							
18:00 - 18:59					Referral Assessment		
19:00 - 19:59							
20:00 - 20:59							
RESPONSIBILITY	Trainer / Auditor					Individual	Individual

Week 3

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
09:00 - 09:59							
10:00 - 10:59							
11:00 - 11:59							
12:00 - 12:59							
13:00 - 13:59							
14:00 - 14:59							
15:00 - 15:59							
16:00 - 16:59							Call Taking
17:00 - 17:59				Call Audit Review		Call Taking	
18:00 - 18:59							
19:00 - 19:59							
20:00 - 20:59							
					Auditor	Individual	Individual

Week 4

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
09:00 - 09:59							
10:00 - 10:59							
11:00 - 11:59							
12:00 - 12:59							
13:00 - 13:59							
14:00 - 14:59							
15:00 - 15:59	Call Audit Review						
16:00 - 16:59	UCC Dispatcher Classroom						
17:00 - 17:59					UCC Dispatcher Assessment		
18:00 - 18:59	UCC Dispatcher Live Training	UCC Dispatcher Live Training			Call Taking		
19:00 - 19:59							
20:00 - 20:59							
Auditor / Trainer / BuddyTrainer / Individual							

Week 5

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
09:00 - 09:59							
10:00 - 10:59							
11:00 - 11:59							
12:00 - 12:59							
13:00 - 13:59							
14:00 - 14:59							
15:00 - 15:59	Call Audit Review						
16:00 - 16:59	Home Visit Dispatcher Classroom						
17:00 - 17:59					HV Dispatcher Assessment		
18:00 - 18:59	Home Visit Dispatcher Live Training	Home Visit Dispatcher Live Training					
19:00 - 19:59							
20:00 - 20:59							
Auditor / Trainer / Buddy Buddy Trainer							

Total Weekly Working Hours

	Hours
General Organisational Training	4
Mandatory Learning	6
Role Specific Training	11
Live Call Taking	30
Call Audit Review	3
Live Dispatcher Training	12
Assessment	3
Total Hours	69
Average of 14 hours per week	