

**Proposal by the City and Hackney GP Confederation for the delivery of training for reception and clerical staff, as part of the General Practice Forward View Development Programme**

<p><b>1. Title</b></p>	<p>Delivery of reception and clerical staff training in general practices across the City and Hackney CCG area (43 practices)</p>
<p><b>2. Introduction</b></p>	<p>The purpose of this proposal is to set out a package of training that can be delivered to reception and clerical staff in general practice, to support these staff to undertake enhanced roles in active signposting and management of clinical correspondence.</p> <p>This training will meet the specification as set out in the General Practice Development Programme, under the General Practice Forward View<sup>1</sup>.</p> <p>In addition, through proposed work on the development of a Practice Support Team and on the embedding of quality improvement techniques in general practice, we will be able to build on the enhanced skills and confidence reception and clerical staff gain from this training and provide planned and ongoing advice and guidance.</p>
<p><b>3. Background</b></p>	<p>In the past 2-3 years, a number of practices, most notably through the Prime Minister’s GP Access Fund, have taken a more systematic approach to identifying the most impactful ways of deploying reception and clerical staff, and have developed formal approaches to processes and training.</p> <p>The General Practice Development Programme therefore intends to support every practice to have the opportunity to train their staff to undertake one or both of these enhanced roles (active signposting and management of clinical correspondence), through providing bursary funding towards training and backfill costs.</p>
<p><b>4. Overview</b></p>	<p><b>Active signposting by reception staff:</b> This provides patients with a first point of contact which directs them to the most appropriate source of help. Receptionists acting as care navigators can ensure the patient is booked with the right person first time.</p> <p>Reception staff will receive training and access to a directory of information about services, in order to help them direct patients to the most appropriate source of help or advice. This will include services in the community as well as within the practice.</p> <p>We will directly link this training to the comprehensive information that is available via the One Hackney and City programme of local services as well as other existing care pathways.</p> <p>We will also be able to train staff via this proposal on the effective use of other initiatives such as eConsult and the City and Hackney Health app, as robust and tested alternative sources of help for patients.</p> <p><b>Benefits for practices:</b> This innovation frees up GP time, releasing about 5% of demand for GP consultations in most practices. It makes more appropriate use of each team member’s skills and increases job satisfaction for receptionists.</p>

<sup>1</sup> <https://www.england.nhs.uk/ourwork/gpfv/gpdp/reception-clerical/>

	<p><b>Benefits for patients:</b> It is easier for patients to get an appointment with the GP when they need it, and shortens the wait to get the right help.</p> <p><b>Correspondence management by clerical staff:</b> A member of clerical staff in the practice is given additional training and relevant protocols in order to support the GP in clinical administration tasks. All incoming correspondence about patients from hospitals is processed by a member of the clerical team, with the training enabling them to deal with most letters themselves.</p> <p>Working against standard protocols developed by the Confederation and refined through continuous improvement, the member of the team reads the letter, enters details into the patient’s record and takes appropriate follow-on action. In some cases this involves other members of the team, or booking the patient an appointment.</p> <p>The clerical staff member, once fully trained, is then able to take on a role as medical assistant to the practice GPs.</p> <p>Ongoing advice and support will be provided via the Practice Support Team and through the quality improvement techniques to be rolled out across practices.</p> <p><b>Benefits for practices:</b> Using this system, 80-90% of letters can be processed without the involvement of a GP, freeing up approximately 40 minutes per day per GP. For the clerical team, job satisfaction is often increased as well.</p> <p><b>Benefits for patients:</b> Practices report they are often able to take speedier action on some issues. More detailed coding of clinical information in the GP record results in improved monitoring and management of certain conditions.</p>
<p><b>5. Training</b></p>	<p><b>Active signposting for patients:</b> This training will provide an enhancement to normal good customer service skills for reception staff.</p> <p>Reception staff will undertake training to ensure that they are skilled and confident in sensitively ascertaining the nature of a patient’s need and exploring with them safe and appropriate options, including sources of advice and support outside of the practice as well as within. Often these sources will be drawn from a directory of services which the reception staff would need to become highly familiar with.</p> <p>Training will cover, but not be limited to:</p> <ul style="list-style-type: none"> <li>• Enhanced customer care;</li> <li>• Communicating effectively, including with those who have communication needs;</li> <li>• Identifying red flags for medical emergencies;</li> <li>• A detailed review of the directory of services;</li> <li>• An opportunity to hear from a receptionist who already provides this enhanced role.</li> </ul> <p>Ongoing advice and guidance will be provided by the GP Practice Support Team and through quality improvement work to be undertaken across City and Hackney practices. This will ensure that any knowledge gaps are filled and that we continue to build staff confidence.</p>

	<p>All staff who have undergone training will be provided with a checklist to help them through the process of identifying what the patient is asking for and how best they can be directed.</p> <p><b>Correspondence management by clerical staff:</b> This training will provide enhanced skills for clerical staff, beyond typical correspondence tasks of scanning, filing and forwarding on to GPs.</p> <p>The training will support clerical staff to become skilled and confident in their ability to:</p> <ul style="list-style-type: none"> <li>• make decision on how to code a letter and its contents in a patient record;</li> <li>• use a Confederation designed protocol for deciding which letters need to be sent to a GP and with what level of urgency;</li> <li>• when to ask for help.</li> </ul> <p>Ongoing advice and guidance will be provided by the GP Practice Support Team and through quality improvement work to be undertaken across City and Hackney practices. This will ensure that any knowledge gaps are filled and that we continue to build staff confidence.</p> <p>Each practice whose staff attend the clerical training will be requested to nominate a supervisor to provide supervision to the clerical staff member undertaking this enhanced role. Each practice will also be required to undertake a quarterly audit of safety and effectiveness.</p> <p>It is envisaged that each clerical staff member who has been trained commences with the processing of one GPs letters initially so that the benefits can be measured prior to further roll-out within the practice.</p> <p>Clerical staff will also have the opportunity, whilst undergoing training, to hear from staff already delivering this enhanced role. Contact will be made with areas already implementing this model, for instance the practices working in the Brighton &amp; Hove area via the GP Access Fund.</p>
<p><b>6. Communication</b></p>	<p><b>Signposting checklist:</b> We will develop a standardised checklist to be used in each practice, which will guide reception staff through the process of identifying what it is patients are asking for and how they can best be directed.</p> <p><b>Directory of Services:</b> The directory of services will be developed from data stored on the London Borough of Hackney iCare website, the most comprehensive database of services across Hackney which is also being used to inform eConsult and the City and Hackney Health App. The Directory will be further updated with services from the City Health database.</p> <p>Practice websites will also be updated to enable easy access to this data, replicated online.</p>
<p><b>7. Finance</b></p>	<p>Please Appendix A for our proposal costings.</p>

## Appendix A – Proposal Costings

Costings for delivery of training to enhance the roles of reception and clerical staff		
<b>Project delivery and overheads</b>		
Project support - admin	£1,250.00	Checklist for reception staff, organisation/co-ordination of training - £125 per day, total of 10 days
Project support - clinical	£1,280.00	Development of standard protocols for management of clinical correspondence - 4 sessions (4 hours per session) @ £80 per hour
Confederation overheads (10%)	£2,353.00	
<b>Total</b>	<b>£4,883.00</b>	
<b>Training</b>		
Reception staff	£10,500.00	
Clerical staff	£10,500.00	
<b>Total</b>	<b>£21,000.00</b>	
<b>TOTAL EXPENDITURE</b>	<b>£25,883.00</b>	