

# Receptionists' Competency Booklet

**Top Level**



## Competency Areas

1. Managing Practice Appointments (Signposting)
2. Linking with the Voluntary Sector (Signposting)
3. Effective Communication (Signposting)
4. Managing Clinical Correspondence (Clinical Correspondence)
5. Auditing Clinical Correspondence (Clinical Correspondence)
6. Team Development and Learning
7. Training and Career Development

Name: \_\_\_\_\_

Assessor: \_\_\_\_\_

GP practice: \_\_\_\_\_

## Introduction

Congratulations on completing the advanced level booklet and welcome to the top and final level. Hillingdon Primary Care Workforce team is delighted to continue to support the good work of the Practice Managers and Administrators of Hillingdon's GP Practices with this second booklet of the Hillingdon Receptionists' Competency Framework.

## What is the competency framework?

The framework is local guidance for the competencies that GP practice receptionists should have to carry out their roles with skills and confidence. It brings together a range of work areas and important tasks that receptionists and administrators are expected to carry out in their day to day roles. It is a checklist that can be interpreted to fit each individual GP practice and to work within GP practice level policies and procedures. This top level booklet is part three of a series of booklets and builds on the 7 competency areas of the advanced level with a further 7 areas for the detailed working of receptionists and administrators carrying out the functions of signposting and clinical correspondence in particular.

## Why is it useful?

Hillingdon's Practice Managers and Receptionists led and were consulted upon its design and content and the feedback was that it would be very useful to:

- Promote best practice amongst Hillingdon GP practices
- Enable consistency in standards across Hillingdon GP practice receptionists
- Allow receptionists to easily show their skills and competencies to support appraisal and career development processes
- Allow managers to easily see the gaps and training needs for their staff and match their staff skills and experience for effective working

## Who is it for?

This top level booklet is the third in a series of three booklets and builds upon the competencies already completed at standard and advanced level. The functions of the practice receptionist and administrator have been built

upon to develop the roles of signposting patients and managing clinical correspondence. In Hillingdon, we have concentrated on these programmes in terms of staff skills and practice organisational and operational change. Staff have been encouraged to develop the skills with locally commissioned training and peer learning programmes and use them supported by locally compiled resources. Roles may be part of a wider job, shared across practice staff or defined in one job description. Different practices will have different titles but Signposters, Navigators, Social Prescribers, Medical Assistants and GP Assistants are the kind of jobs that these skills enable. In particular, in Hillingdon, we have developed the role of Health Champion, spending more time in practice understanding the wider needs of referred or interested patients. Only receptionists who have been signed off against, and received their certificates for, the advanced level booklet should then begin this top level booklet and only if the interest is in a career including signposting and / or clinical correspondence.

This is still a part of career progression that may lead to senior reception work, practice management or, more likely, into other practice-based staffing areas such as Care Coordinators and HCAs. The competencies have been classified to indicate those most important towards 'clinical correspondence' roles and those most important towards 'signposting' roles. The wider NHS environment is encouraging the 'Band 1-4' workforce with apprenticeships, GP assistant, navigator and coordinator roles. Having a local framework to support our reception and administration staff in developing themselves will encourage their retention in general practice and their ability to translate their skill set into any of these roles.

This booklet can be used for:

- Progression of receptionists and administrators into more senior and leadership roles
- Consolidating the skill sets of current senior receptionists and administrators alongside training
- A personal record to evidence transferrable skills
- A tool for consistency of practice within and across practices particularly within the clinical correspondence and signposting programmes.

## How do we use it?

The top level booklet has 7 competency areas with key tasks listed underneath. These can be tailored and added to but form the basis of meeting the top level competency framework requirements. For each task or group of tasks, receptionists and administrators can tick the boxes to show they are working towards or have completed the requirements to achieve a good working standard in this subject. Sign off is by a senior member of staff and is to be given on assessing the adequate delivery of the task under observation. Observing receptionists and administrators at work and with patients and colleagues over a period of time will be the main form of assessment and sign off. But written evidence can be collated and shown where appropriate and relevant.

## Certificate of Achievement

Final sign off of all competency areas and tasks can be given by the Practice Manager and a Hillingdon certificate awarded for completion of the competency framework top level. These certificates will be standard currency across at least Hillingdon and provide administrators with recognition of the good work that they do in general practice every day.



Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>1. Managing Practice Appointments (Signposting)</b> Be able to undertake, understand and articulate the following:				
<ul style="list-style-type: none"> <li>Understand the utilisation of the appointments system by both patients and staff. Recognise and highlight patterns where appointments are under-utilised or over-booked including excessive waiting times or little availability throughout the day or into the following weeks. Ensure the system is accurate and maintained, and have knowledge of the EMIS and telephone system tools for analysis.</li> </ul>				
<ul style="list-style-type: none"> <li>Analyse patient demand for appointments by identifying what percentage of the Practice list size phones, books online, books in person for appointments in a week (on average 5-9%), which methods are more popular, with which population, and at which times of the week and day.</li> </ul>				
<ul style="list-style-type: none"> <li>Audit what the Practice currently does, which patients call, are triaged, are seen, by which staff, in which clinics and for what reasons. Is there demand for something that it is not currently provided?</li> </ul>				
<ul style="list-style-type: none"> <li>Understand from the GPs which staff are able to triage, see, treat, manage which patient populations and which presentations or conditions. Articulate this to all staff to enable signposting and appointment booking to the most relevant clinician or team member.</li> </ul>				
<ul style="list-style-type: none"> <li>Work with the Practice Manager and GPs to develop the appointments schedules with appropriate clinical and social prescribing skills for the best management of patient need. and social prescribing skills for the best management of patient need.</li> </ul>				
<ul style="list-style-type: none"> <li>Identify "red flag" symptoms with a GP and discuss with the whole Practice team. Develop in-house protocols and training under the supervision of a GP on how best to manage and signpost these.</li> </ul>				
<ul style="list-style-type: none"> <li>Design protocols and procedures and ensure communication and compliance for any new ways of working across the whole Practice team. Ensure with the GPs the patient involvement in and awareness of any new ways of booking, triaging, receiving appointments.</li> </ul>				
Notes:				

Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>2. Linking with the Voluntary Sector (Signposting)</b> Have an understanding of, and contact with, the wider health and social care provision and be able to inform patients accordingly:				
<ul style="list-style-type: none"> <li>Actively promote Patient Access (Patient Online) to patients for online booking, access and management. Understand the Practice implementation of the system, how it works and the requirements for patient registration. Ensure the team works and promotes in a similar way.</li> </ul>				
<ul style="list-style-type: none"> <li>Actively promote other local and national schemes to assist patients and their families for example the Minor Ailments Scheme, My Health, Aggie the Alien, offers from your PPG, Citizens Advice Bureau, etc.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure that the team are aware of roles, responsibilities and boundaries in signposting patients including basic information, when to refer to more knowledgeable 'signposters', how to refer to the Practice Health Champion, etc. Wear the 'Just Ask Me' badges to engender patient conversations.</li> </ul>				
<ul style="list-style-type: none"> <li>Maintain the waiting areas and information areas with up to date and relevant information for patients in the forms of leaflets and posters as well as digital information on screens and at information points. Ensure the Hillingdon 4 All information and voluntary sector pack is available and kept up to date and in stock.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure patients are aware of the Practice Website and other sources of information such as Connect to Support website, Health Help Now app, Hillingdon 4 All services, NHS UK in order to enable patient choice and empowerment.</li> </ul>				
<ul style="list-style-type: none"> <li>Organise members of the voluntary sector to come and speak to staff at team meetings or to patients in the waiting room in order to gain more knowledge and understanding of the work they do and the services they offer.</li> </ul>				
Notes:				

Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>3. Effective Communication (Signposting)</b> Be able to undertake, understand and articulate the following:				
<ul style="list-style-type: none"> <li>Understand and manage your communication style ensuring it is clear, effective and appropriate for the situation including respecting personal situations and cultural factors. Modify and improve your style with open feedback and honest reflection.</li> </ul>				
<ul style="list-style-type: none"> <li>Demonstrate a warm, empathetic, sensitive and helpful approach appropriate for working with staff and patients in general practice and the NHS.</li> </ul>				
<ul style="list-style-type: none"> <li>Understand the terminology around patient care and be able to translate that into manageable and appropriate formats for patients and families.</li> </ul>				
<ul style="list-style-type: none"> <li>Be able to conduct holistic assessment of people and situations both on the telephone and in person.</li> </ul>				
<ul style="list-style-type: none"> <li>In Health Champion roles, work with patients and carers to identify their own strengths and resources to achieve their goals and advise on availability of support to do so.</li> </ul>				
<ul style="list-style-type: none"> <li>Demonstrate understanding of adult and child safeguarding, end of life care, the needs of older adults and mental health conditions, including dementia, and how these can impact on a person's behaviour. Understand how to manage difficult conversations sensitively and seek help if required.</li> </ul>				
<ul style="list-style-type: none"> <li>In all patient and family contacts, look out for additional signs and identify what other support you can be or offer to promote independence and wellbeing. Find out about and offer clear and useful information regarding local support groups and services.</li> </ul>				
<ul style="list-style-type: none"> <li>Flag up with the GPs and wider team any concerns you have or patients you have noticed who may be particularly 'vulnerable' or 'at risk' for referral to Health Champions, pro-active management by the Practice, or assessment within Wellbeing or Care Connection services.</li> </ul>				
Notes:				





Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>4. Managing Clinical Correspondence (Clinical Correspondence)</b> Be knowledgeable and competent to lead the following:				
<ul style="list-style-type: none"> <li>Understand which types of clinical correspondence come into and out of the practice, in what format and from which source. Identify groups of correspondence that can be dealt with similarly, categorise these groups and define the processes by which they are received / sent, sorted, scanned, checked, actioned and filed.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure there is 'how to' guidance for sorting and scanning, and that the GPs have designed and described any delegated functions for checking, actioning and filing. GPs need to maintain oversight and training for any actions including coding into the system.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure that any new processes and the associated guidance and procedures are clearly written and understood by all staff involved in any aspect of clinical correspondence so that their roles, responsibilities, boundaries and handovers are clearly defined.</li> </ul>				
<ul style="list-style-type: none"> <li>Identify relevant staff from within the team to work on clinical correspondence ensuring any delegated functions are clearly handed over with continued clinical oversight and that they have attended the relevant training on:               <ol style="list-style-type: none"> <li>1. Medical terminology</li> <li>2. Summarising</li> <li>3. Coding</li> </ol> </li> </ul>				
<ul style="list-style-type: none"> <li>Learn and understand the clinical systems in use in the practice to be able to promote the use of EMIS and Docman to their full capacity for the accurate, efficient and effective management of patient information.</li> </ul>				
<b>Notes:</b>				

Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>5. Auditing Clinical Correspondence (Clinical Correspondence)</b> Be able to undertake, understand and communicate the following:				
<ul style="list-style-type: none"> <li>Identify the workload issues that most impact on use of GP and other clinician time on non-clinical activities or are at most risk of creating a backlog in practice work.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure you have an understanding of the current and changing situation in Practice. Audit the correspondence at baseline and regularly thereafter in terms of numbers, formats, types, time through the system, hours of work to manage it and where it ends up. Analyse which changes are having an impact on GP workload and time.</li> </ul>				
<ul style="list-style-type: none"> <li>Audit the system either by random letter selection or an embedded template search to ensure its clinical and patient safety, ensuring both patient journeys and outcomes were safe and timely, and that GPs are clinically satisfied with these.</li> </ul>				
<ul style="list-style-type: none"> <li>Identify, record and learn from any near misses or incidents highlighted from the audit, discussing at team meetings and adjusting procedures or improving training accordingly.</li> </ul>				
<b>Notes:</b>				



Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>7. Training and Career Development</b> As well as all the above, ensure completion and regular updating of all Practice mandatory training, know the key Practice leads and have a good awareness of the policies and procedures, where to find them and your role in their implementation.				
<ul style="list-style-type: none"> <li>For leadership roles in Practice, the following skills and training are recommended, these are often available at London-wide level or through individual education courses:               <ul style="list-style-type: none"> <li>Supervisory and management skills</li> <li>Decision making skills</li> <li>Persuasion and negotiating skills</li> <li>Giving and receiving feedback skills</li> <li>Change management or quality improvement skills</li> <li>Project management skills</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>Where you are developing Signposting skills, you may wish to progress to a Practice Health Champion role, and you will need the following in particular, commissioned as part of the Hillingdon training package for Signposters and Health Champions:               <ul style="list-style-type: none"> <li>Customer care including telephone skills</li> <li>Active signposting skills</li> <li>Health coaching skills</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>Where you are developing Clinical Correspondence skills, you may wish to progress to a GP Assistant role, and you will need the following in particular, commissioned as part of the Hillingdon training package for Clinical Correspondence:               <ul style="list-style-type: none"> <li>Medical terminology understanding</li> <li>Clinical coding knowledge</li> <li>Summarising skills</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>On completion of the Hillingdon Receptionists' Competency Framework booklets, you will now be in leading roles within the Practice administration team: managing reception, managing teams, signposting patients and / or managing clinical correspondence. For further career progression you can look to:               <ul style="list-style-type: none"> <li>Practice Manager competencies</li> <li>HCA competencies</li> <li>Care Navigation / Coordination competencies</li> </ul>               These have their own frameworks and training and development requirements.             </li> </ul>				

## Some Useful References

-  Hillingdon CCG Extranet – [nhsnwl.oak.com/Account/Login](https://nhsnwl.oak.com/Account/Login)
-  Hillingdon GP Confederation Website – [www.hillingdonprimarycare.co.uk](http://www.hillingdonprimarycare.co.uk)
-  Skills for Health Website – [www.skillsforhealth.org.uk](http://www.skillsforhealth.org.uk)
-  Council Voluntary Sector Website – [www.connecttosupporthillington.org](http://www.connecttosupporthillington.org)
-  Hillingdon Primary Care Workforce team email – [hillccg.training@nhs.net](mailto:hillccg.training@nhs.net)
-  Hillingdon CCG communications email – [hillccg.CCGcommunications@nhs.net](mailto:hillccg.CCGcommunications@nhs.net)

## On Completion

Congratulations! You have successfully completed and been signed off as achieving the Hillingdon Receptionists' Competency Framework's top level competencies. Your certificate will be presented to you by your Practice Manager and the Hillingdon Primary Care Workforce team will be informed of your achievement.

We wish you every success in the important role you currently play in general practice and any career progression you may wish to undertake. Ask your Practice Manager regarding your future training and development needs and get in touch with us with suggestions or requests for Hillingdon events and courses. We are here to assist you in your training and development and share good practice and local knowledge: [hillccg.training@nhs.net](mailto:hillccg.training@nhs.net)

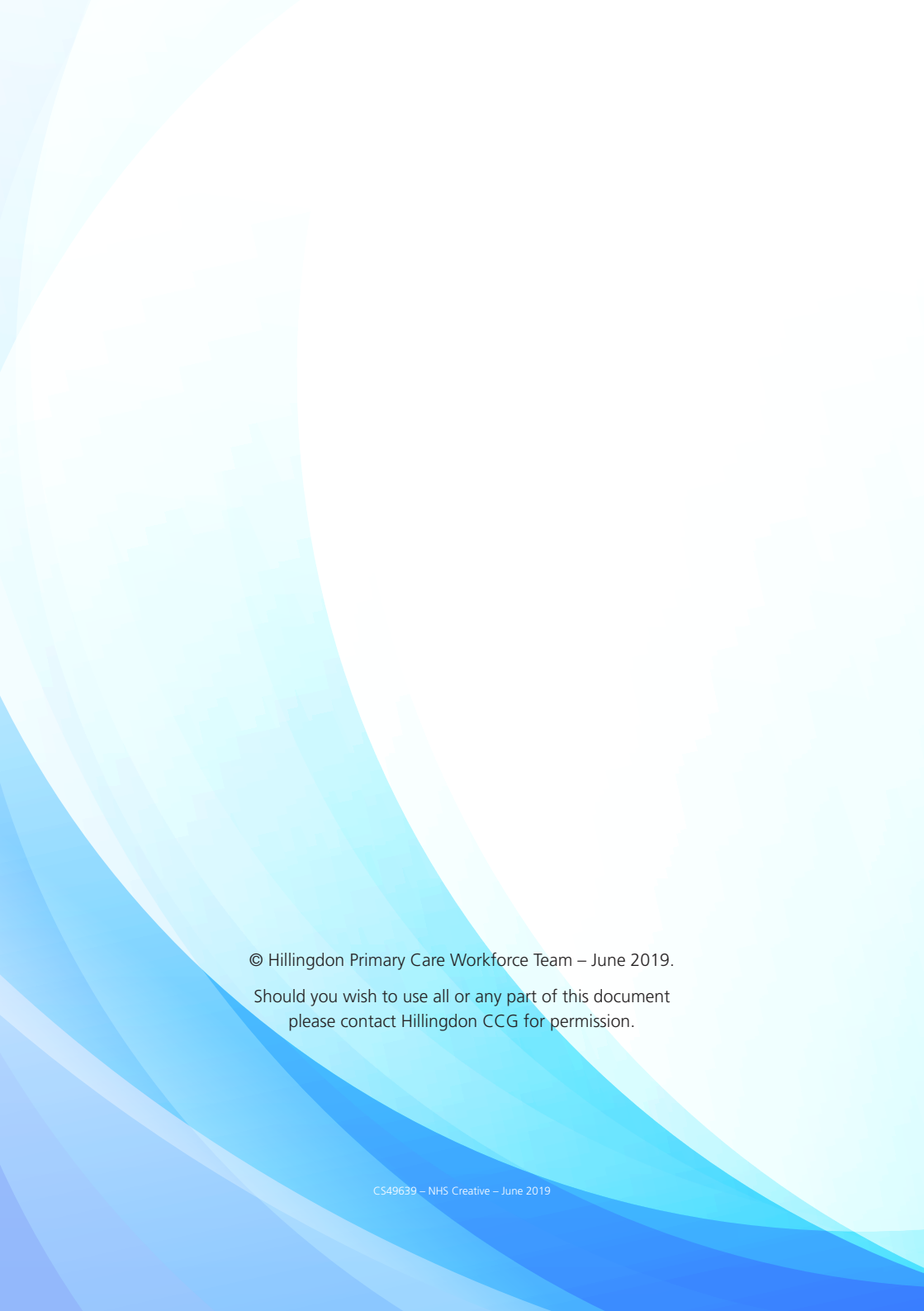
*Primary Care Workforce Team*

## With Thanks To:

Marie Franklin, Hillingdon Practice Manager  
Dr Sabby Kant, Hillingdon Clinical Lead for Education and Training  
Annette Alcock, Hillingdon Primary Care Workforce Lead  
Hillingdon CCG Communications Team

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