

# SevernSide

## Integrated Urgent Care

# Standard Operating Procedure for allocating cases via Adastra to individual clinicians

| Version:                      | Owner:              | Created:                      |
|-------------------------------|---------------------|-------------------------------|
| 1.1                           | Sri Jeyathaas       | 1 <sup>st</sup> February 2023 |
| Published:                    | Approving Director: | Next Review                   |
| 7 <sup>th</sup> November 2023 | Lucy Grinnell       | 13 <sup>th</sup> July 2026    |

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## Introduction

The purpose of this document is to set out the standard operating procedure (SOP) for how IUC cases on Aداstra will be allocated to clinicians by WACCs from the IUC advice queue.

## Roles and responsibilities

**WACC:** To allocate the cases to clinicians on Aداstra at an appropriate pace that reduces admin time for clinicians and in turn should reduce the pressure on clinicians. Additionally, WACCs should actively communicate and take feedback from clinicians, this feedback should be used to ensure that allocations are as effective as possible.

**Shift Manager:** To confirm which WACC will be responsible for allocating during shift. To discuss with clinicians when to pick up cases outside of their allocated list.

**Clinician:** To focus on their allocated cases. To maintain open communication with WACCs including giving feedback on the process. Advise the Shift Manager if they need to take on a case outside of their allocated cases.

## Objectives of the procedure

Through this process we aim to achieve the following:

- Reducing admin time for clinicians
- Ensuring appropriate cases are allocated to the right clinicians
- Improve wellbeing and reduce pressure for clinical staff by giving clinicians their own dedicated work queue away from the busy main IUC advice queue

# The Standard Operating Procedure

Adastra has a function where individual cases can be allocated to specific clinicians. This allocation process will require clinicians and operational staff to work together. Operational staff will allocate the cases to each clinician. Clinicians will be able to see the cases allocated to them in their own work queue and deal with the case as usual. We are trialling this process throughout February to learn and evolve the process.

## Operational Team:

This process will run as standard on both weekdays and weekends, when the WaCCs are operational. WaCCs will manage the allocation throughout the shift, with the support of the Shift Manager. If resourcing challenges, or other pressures, mean this is not possible it should be noted on the shift report. The weekend handover/seating plan will note which WaCC this will sit with, on a weeknight this should be agreed on shift.

## Shift Manager:

- The shift manager should note on MOTD which WaCC is managing allocation that shift
  - If 4 WaCCs on shift, the Home Visit WaCC or LIVI WaCC should be responsible for doing Adastra allocation
- When sending Adastra messages, include this process is active and advise which WaCC is managing it
- Should a clinician who is having cases allocated need to pick up cases outside those that are allocated, this should be agreed through discussion with the Shift Manager

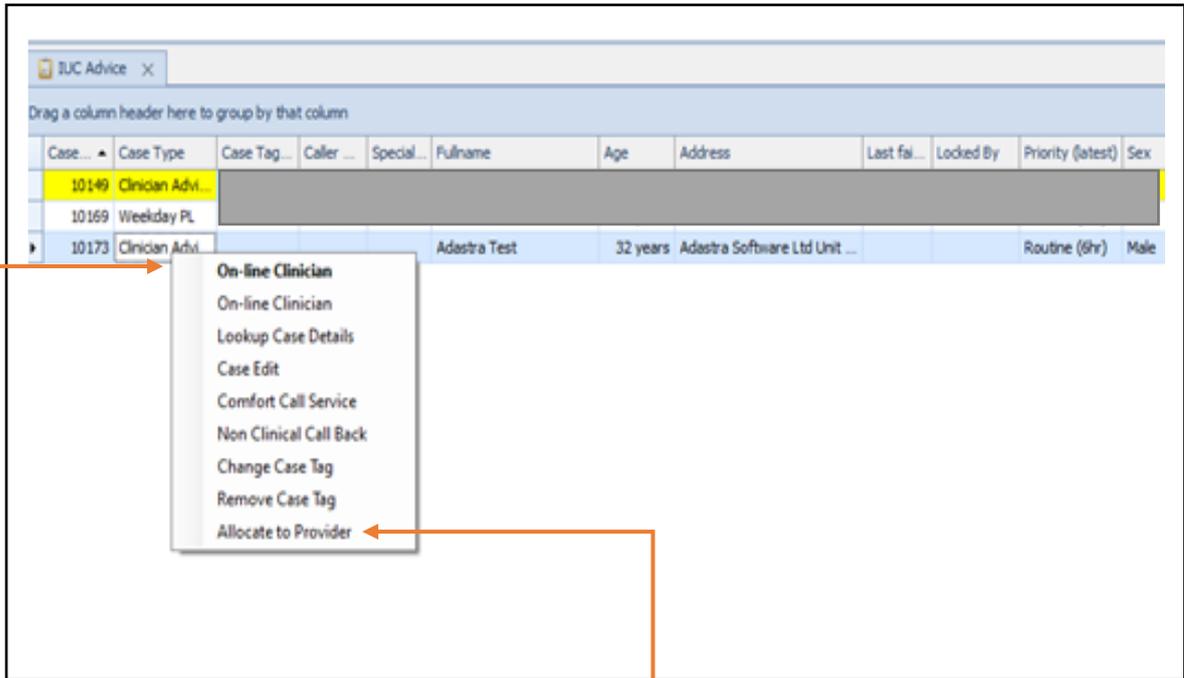
## WACC:

- For the purpose of the pilot do not allocate to the Clinical Coordinator, Clinical Navigator or face to face clinicians at Treatment Centres
- Cases will be allocated in the same order clinicians work the IUC Advice queue; BLACK and RED cases should be prioritised, if there are not BLACK/RED cases on the queue, amber cases will then be prioritised for allocation. Priority tagged cases can also be allocated
- 3-4 cases should be allocated to each clinician at the start of their shift
- As soon as a clinician starts their shift, instant message them to let them know that you are doing Adastra allocation for that shift and maintain communication through instant message e.g., if an allocated case isn't appropriate for them
  - This communication should check with the clinician if there are restrictions around what type of cases can be allocated to them
- Throughout the clinician's shift, maintain a consistent flow of allocated cases, ideally drip feeding cases one at a time. This may not always be possible when juggling tasks and you may need to allocate more. There should be no more than three unlocked cases allocated at any one time. However, this should be allowed to go down to zero outstanding at times.
- Please aim to enable the clinician to clear the queue by the end of their shift, not to have cases left to reallocate
- Use the filter function on Adastra to monitor how many cases are currently allocated to each clinician

- Throughout your shift record on the allocation tracker (O:\Integrated Urgent Care Service (IUC)\WaCC Forms\Allocation ) which clinicians you have worked with. Please populate all columns. This should be saved, and does not need to be sent to anyone. Team Managers will clear this data weekly

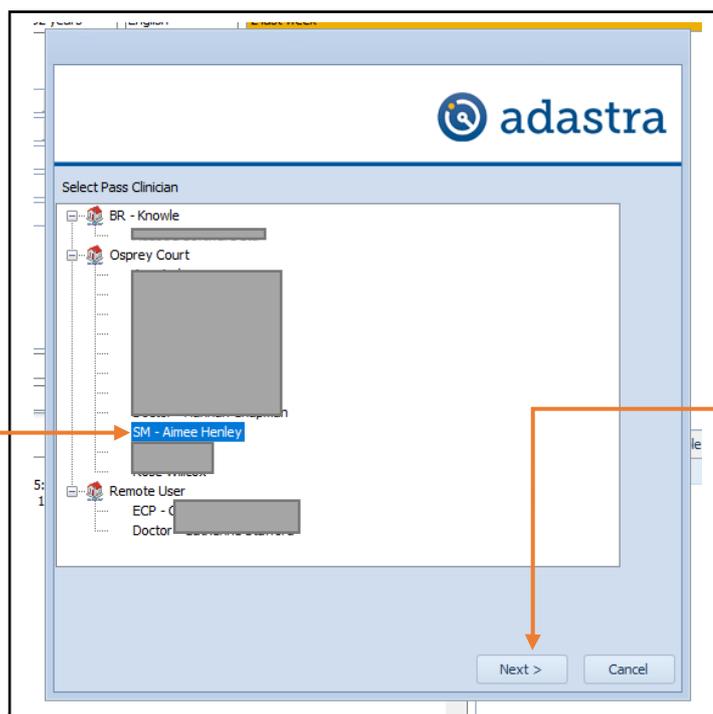
## Allocating the case on Adastra:

1. Right click on the case you want to allocate in the IUC Advice list.



2. Click on 'Allocate to Provider'

3. After step 2, this box will open. Select the clinician you want to allocate the case to.



4. After selecting the clinician, press 'Next'.

5. You will be taken back to IUC advice list and in the 'Allocated' column you will be able to see who the case has been allocated to, for example in this case "Admin Doctor".

| Case... | Case Type         | Case Tag... | Allocated   | Caller ... | Special... |
|---------|-------------------|-------------|-------------|------------|------------|
| 10173   | Clinician Advi... |             | Admin Do... |            |            |
| 10175   | Weekday PL        |             |             | Doctor ... |            |
| 10179   | Weekday PL        |             |             | Doctor ... |            |
| 10182   | Weekday PL        |             |             | Doctor ... |            |

### Reallocating the case on Aداstra:

You may want to reallocate cases to a different clinician due to a few reasons such as:

- Patient needs have changed so a different type of clinician might be required
- Accidentally allocated to the wrong clinician
- Initial clinician that the case was allocated to has finished or is finishing their shift soon

Cases cannot be unallocated on Aداstra so once they have been allocated to a clinician they can only be reallocated.

1. Right click on the case you want to reallocate.

| Case... | Case Type         | Case Tag... | Allocated... | Caller ... | Special... | Fullname     |
|---------|-------------------|-------------|--------------|------------|------------|--------------|
| 10192   | Weekday PL        |             |              | Doctor ... |            |              |
| 10193   | Clinician Advi... |             | Admin Do...  |            |            | Adastra Test |

**On-line Clinician**

- On-line Clinician
- Lookup Case Details
- Case Edit
- Comfort Call Service
- Non Clinical Call Back
- Change Case Tag
- Remove Case Tag
- Allocate to Provider

2. Click on 'Allocate to Provider'. Then follow steps 3 to 5 found in [Allocating the case on Aداstra](#).

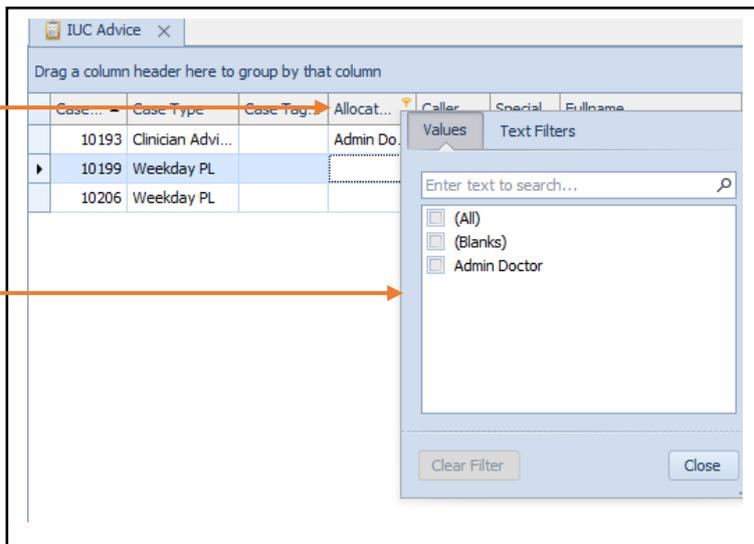
Filter:

## Use filter to monitor individual allocations

Cases can be filtered based on who they have been allocated to and whether they have been allocated.

1. On the IUC Advice list, find the column titled 'Allocated to' or 'Allocate....'. On the title you will see a small filter sign

Allocated to



2. Click the filter sign and you will see a tick boxes for: All, Blanks, and each clinician that has case currently allocated to them.

- 3a. If you want to see all allocated cases, select All, then untick Blanks
- 3b. For cases allocated to specific clinicians, select only the specific clinicians
- 3c. To see all unallocated cases, only select Blanks
4. After selecting the appropriate option, press close.

## Clinician role:

- On the left-hand side menu in Adatastra, go to the "My Work" option, this should open a new queue which will show the cases that have been allocated to you
- The WACC allocating cases will instant message you on Adatastra to let you know that they will be allocating
- Please work from your 'My Work' queue for the shift, however, if you need to pick up a case not allocated to you, please let the Shift Manager know
- Maintain open communication with the WACC through instant messaging on Adatastra e.g., if you are to go on break or need the WACC to stop allocating due to a case being more complicated than expected
- Provide feedback on this process to the WACC

## Reporting:

### Weekly analyses

- The Allocation WaCC will collect feedback and fill out the tracker on the O Drive. All columns should be completed .Team Managers will clear this data weekly
- Team Managers will carry out Adatastra reporting on a weekly basis during which they will assess how many cases have been allocated overall and by clinician, consultation length, and cases completed per hour for each clinician. The reporting template found in the Appendix A can be used for this

### Appendix A. Reporting Form:

| Date of shift:    | Clinician:     | Number of cases allocated: | Shift length: | Cases completed per hour: (Number of cases allocated/Shift length) |
|-------------------|----------------|----------------------------|---------------|--|
| <i>09/02/2023</i> | <i>Dr XXXX</i> | <i>14</i>                  | <i>6 hrs</i>  | <i>2.5</i>   |
|                   |                |                            |               |  |
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