

Integrated Access Partnership (IAP)
Standard Operating Procedure (SOP)



Mental Health

Integrated Access Partnership

Intelligent Mental Health System Response

Integrated Access Partnership (IAP)

Onboarding & Induction

Standard Operating Procedure (SOP)

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NHS
Avon and Wiltshire
Mental Health Partnership

NHS Trust

SevernSide

Integrated Urgent Care



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Integrated Access Partnership (IAP) Standard Operating Procedure (SOP)

Objective

This standard operating procedure (SOP) sets out how the IAP will support all new staff through the onboarding process to ensure a robust learning experience and structured induction plan.

Scope

This SOP relates to the recruitment process and onboarding process for all IAP clinical roles:

- Associate Practitioner (B4)
- Senior Associate Practitioner (Unregistered B5)
- Developmental Specialist Practitioner (Registered B5 – B6)
- Specialist Practitioner (B6)
- Development Senior Practitioner (B6–B7)
- Senior Practitioner (B7).

This SOP includes the onboarding process for bank staff working within the IAP.

Recruitment

When a vacancy is identified, the Team Manager/Recruitment Lead should follow the AWP Recruitment and Selection Policy and process, and create an advert on Trac. (New Trac accounts can be requested via awp.recruitment@nhs.net). Further information and guidance is available on the AWP intranet.

When a job role has been identified for advertising, it is likely the position has been recruited to before. Therefore, you can request for the position to be re-advertised by contacting AWP recruitment, awp.recruitment@nhs.net, in the first instance or by phoning 01225 258660.

If the job role is a new advert that has not been previously advertised by the IAP, it is best to find the long recruitment number from a previously advertised job and insert it in the search field or use the key word section in order to progress to vacancy authorisation request:

To republish a closed IAP role:

- Contact AWP Recruitment (awp.recruitment@nhs.net) or call 01225 258660 to re-advertise a recently closed role .
- Use the keyword search to find a prior IAP advert to update and republish.

For new roles complete the following steps to populate the Trac authorisation request:

1. Complete the Vacancy information:

- Confirm job title and number of full time equivalents (check Workforce spreadsheet on GlassCubes).
- Add cost codes and reason for vacancy.
- Answer vacancy questions.
- Set target start date (usually two months after advert).
- Add authorisers:
 - Service Manager/Recruitment Lead
 - HR Admin
 - Finance (Management Accountant)
 - AWP HR Team
- Insert proposed interview date.
- Attach job description and IAP information document

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- Check contact details for candidate queries (this can be a very important part of generating interest).
- Add short listers and interviewers (must include at least one mental health trained staff member).
- Submit for authorisation. Once approved, the vacancy goes live on NHS Jobs.

2. When authorised and live on Trac:

- Notify IAP Admin (awp.iapadmin@nhs.net) and BrisDoc People Team (workwithus@brisdodoc.org) with position title, link, and closing date for:
 - Recording
 - Mutual advertisement

Onboarding

1. After interviews and acceptance:

- Update Trac to show the Team Manager responsible for onboarding.

2. Add new starter to onboarding tracker:

- Location: X:\IAP Admin\RP Passport\RP Checklist.

3. Complete recruitment checks:

- ID verification, references, DBS, Occupational Health.

4. Inform IAP Admin (awp.iapadmin@nhs.net) immediately so they can:

- Request honorary contracts.
- Request IT accounts, equipment, building access fobs
- Order uniforms.

5. Once checks are cleared:

- Agree start date with the new starter. Where there remain outstanding checks, eg. honorary contracts, amend any agreed start dates.
- Discuss any factors affecting induction (eg. annual leave).
- Offer further contact from onboarding lead before start date.
- Outline induction process including completion of Development and Assurance Framework
- Admin request SWASFT phone logins.
- Share confirmed start date with:
 - AWP eRostering Team (awp.erostering@nhs.net) to add to roster.
 - Admin to create induction plan.

Refer to AWP Onboarding for Managers page on Ourspace for additional guidance.

What Happens Next?

1. Add shadow shifts to Shadow Calendar:

- Location: X:\BNSSG IAP STAFF\SHIFT PLANNER\Shadow Shifts\calendar of shadow and student shifts.
- Email calendar to awp.iaproster@nhs.net so shifts are added before start date.

Commented [OC1]: Uniform?

Commented [NS2R1]: added

Commented [OC3]: Is this just AWP checks, or once honorary contracts? Cloning issues of staff starting ahead of honorary contracting processes, which can mean without logins, DBS, etc. (or at the very least need for start dates to be amended)

Commented [NS4R3]: amended

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2. Develop and save individual induction plan in:

- X:\BNSSG IAP STAFF\Induction\INDUCTION PLANS & CHECKLISTS.

3. Email induction pack to new starter:

- Induction schedule plan
- Contact number and staff name for first day
- Onboarding checklist
- IAP Induction Booklet
- IAP Overarching SOP
- Development and Assurance Framework
- Development Competency framework (Development Posts Only)
- Induction Feedback forms (X:\BNSSG IAP STAFF\Feedback Forms New Starters & Development Roles)

4. Add individual to IAP WhatsApp group.

Substantive Staff Induction

Induction Plans

The IAP uses a planned approach to induction to ensure all new staff receive a structured induction, achieve competency, and feel confident in their role before working independently.

There are a number of distinct roles and contract types that are on-boarded into the IAP. There are slight differences to the process for each role due to the differing roles, remit, expectations, and responsibilities. This section will cover substantive, development posts (including band 5 to 6 and band 6 to 7) and bank staff.

All IAP staff will remain in the induction phase until all relevant development and assurance competencies have been signed off. This ensures that each team member is fully prepared and confident in their role before progressing. These development and assurance milestones are described within the Quality and Assurance SOP.

For AWP members of the IAP, the Induction/Onboarding process will be part of the probation period. AWP has an Induction/Onboarding and a Probation (New in Post) page on Ourspace - [Onboarding for Managers](#). This offers further support to managers.

Support and Supervision

- Buddy system: Each new starter is paired with a named supervisor for guidance and support and shifts will be prioritised for co-working where possible.
- Additional support: If competency gaps are identified, extra exposure to relevant service lines is arranged promptly (reviewed in weekly managers' meeting).

Induction Principles

All Staff

- All staff will be supported to obtain formal sign-off confirming they have met the expected milestones for their role, as defined in the Development and Assurance Framework (refer to the Quality and Assurance SOP).

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- Staff must complete all mandatory statutory training and IAP-specific training as part of their induction for their role. However, Development and Assurance sign off may occur prior to training completion if agreed, provided that outstanding training is scheduled for a later date.

Registered Practitioners with MHRV working:

- Competency sign-off achieved through completion of assurance and development milestones for MHRV, ideally achieved over three shifts.
- New inductees are expected to lead on assessments after their first shift.
- Staff cannot work autonomously until the four-day MHRV training has been completed.

Review and Sign-Off

Mini appraisal within first 2 weeks:

- Identify experience, gaps, and set goals.
- 3 month and 6 month reviews are pre-booked by admin to support probation.
- If due between 1st April and 30th June, a full appraisal will be required for AWP staff

Midpoint and endpoint induction reviews:

- Supporting information includes note audits (10), call audits (up to 3), observation (listening to live calls), and feedback.
- Development and Assurance framework competency reviewed.

Induction sign off process:

Line manager confirms readiness following endpoint review:

- System access checks
- Mandatory training completion
- Evidence saved in staff file
- Evidence presented in Quality and Assurance Panel
- Outcome shared and saved in New Starter Competency Framework Grid held by admin.
- If not ready, additional support/shadow shifts arranged
- Employing HR department notified of sign-off.

Induction Timelines

Band 4 and 5: 6 weeks supernumerary (last 2 weeks leading clinical work).

Band 6 and above: 8 weeks supernumerary (last 2 weeks leading clinical work).

Development roles: Same structure as registered staff (6+) plus development competency framework review and fortnightly contact with supervisor and line manager post induction.

Core Induction Activities

- Planned meeting with admin to ensure IT systems access
- Service overview session provided by IAP senior management
- Shadowing rotations across MHSD, MHCAS, and MHRV (as applicable)
- Completion of training

Commented [OC5]: Include Admin booking, and including in induction plan?

Commented [NS6R5]: Probation is not included in the induction plan? please clarify. As part of the service overview we will discuss onboarding and induction process, appraisals and probation meetings. Admin would be booking these in from the start of the onboarding process.

Commented [MT7]: FROM ROSIE KEITH: If due between 1/04 and 30/06, a full appraisal will be required for AWP staff.

Commented [NS8R7]: added

Commented [OC9]: Should we add in about when these are and about Admin booking?

Commented [NS10R9]: I am unsure of what you mean Ollie?

Commented [NS11R9]: added admin prebook

Commented [OC12]: Include system access checks, etc.

Commented [OC13]: Outcome comes from Q&A Panel, and then shared. Confirmation saved in file?

Commented [NS14R13]: amended

Commented [OC15]: Add in about IT/Admin session during first week?

Commented [NS16R15]: done

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Statutory and Mandatory Training:

All staff will be provided with time within the induction to complete mandatory training for their employing organisation.

Additional Training:

Band 4

- 2-day induction, RiO (All Southwest Systems), CLEO, CAD, Frequent Caller

Band 5

- 2-day induction, RiO (All Southwest Systems), CLEO, CAD, Frequent Caller
- One to One Management Supervision Training (AWP)

Band 6+ Staff

- 2-day induction, RiO (All Southwest Systems), CLEO, CAD, Frequent Caller, MHRV.
- One to One Management Supervision Training (AWP)
- Difficult Conversations (AWP)
- Preceptor Competencies (AWP)

Commented [OC17]: Should this be included in Band 5 as well?

Commented [NS18R17]: done

Supported Clinical Working Specific for Role to:

Sign-off Development and Assurance Milestones

- Remote Assessment (all staff)
- Advice and Guidance to Emergency Professionals (all staff)
- Mental Health Clinical Navigation (Band 6+)
- Mental Health Response Vehicles (Band 6+)

Provide Clinical Records for Audit and Review

Role Specific Highlights

Band 4/5: Focus on shadowing MHSD & MHCAS, Supervision (Band 5).

Band 6+: Includes clinical navigation, MHRV shadow shifts (expected to lead on second and third), and additional leadership training.

Development roles: Fortnightly contact with supervisor and line manager post induction.

Onboarding Development Posts

All development posts will follow the IAP development competency framework in addition to the standard induction principles described above (please note this is NOT the Development & Assurance Framework).

Initial Development Review

After induction sign off, the Team Manager books an initial development review.

Discussion includes:

- Development process and Development Competency Framework
- Expectations and responsibilities
- Targets and timelines
- Feedback mechanisms

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- Support systems throughout the process

Ongoing Support

Management Supervisor and Team Manager provide consistent support:

- Monthly contact with Management Supervisor
- Fortnightly contact with Team Manager

Each session should include:

- Review of Development Competency sign off opportunities
- Reflection and learning gap identification
- Review of targets and actions
- Feedback discussion

Development Competency Sign Off

- To avoid delays the Clinical Navigator on shift may sign off competencies when observed and evidenced.

Contract Change

- Once all competencies are achieved:
- Team Manager completes change of contract form
- Email Payroll, HR, and eRoster team to update banding.

AWP Bank Onboarding Process

1. Contract Verification

- Confirm the individual holds an AWP bank contract before proceeding.

2. Initial Contact

When a request for a bank shadow shift is received, Team Manager sends initial response email:

- Welcome message
- Request details: banding, discipline, experience, background

If the applicant is suitable send welcome email including:

- IAP overview
- Overarching SOP
- Expectations (e.g., minimum number of bank shifts required to remain on IAP bank and secure honorary contract)

3. Pre Shadow Shift Requirements

MHCAS:

- Sign confidentiality agreement at BrisDoc reception and submit to Facilities team (on arrival for first shadow shift).

MHSD:

- Team Manager requests SWASFT observation form via admin.

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- Admin confirms completion and authorisation before shift proceeds.

4. Bank Shadow Shifts

Bank staff must complete:

- 1 shadow shift at MHCAS
- 1 shadow shift at MHSD
- Shifts are typically **09:00–17:00**
- Staff can indicate preferred service areas for future work.

Once shadow shifts confirmed:

- Add shifts to **Shadow Calendar** (X:\BNSSG IAP STAFF\SHIFT PLANNER\Shadow Shifts)
- Email awp.iaproster@nhs.net to ensure shifts are added as bank.

5. Ongoing Engagement

- Team Manager discusses future bank availability and requirements.
- All bank staff:
- Added to RP Checklist (X:\IAPAdmin\Recruitment Passports\RP Checklist)
- Complete honorary contracting process for relevant services.

6. Induction & Competency

Bank staff follow the same induction process as substantive staff, but in a shorter timeframe based on competency.

Minimum requirements before leaving supernumerary:

- 15 record audits
- 3 call audits
- Development and Assurance framework forms completed.

Training required (where applicable):

- CAD
- CLEO
- Frequent Caller Induction
- MHSD (RIO access)
- Induction training (if not already completed)
- MHRV 4 day training

7. Sign-Off & Review

- End point review covers the same standards as substantive staff.
- Outcome shared in Quality and Assurance Panel
- Registered bank staff wishing to work on MHRV must follow the same procedure as substantive staff.

8. Supervision

- Supervision arranged where possible during shifts with a Team Manager.

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Student Onboarding Process

1. Receiving Student Details

The student lead(s) and admin team will receive student names and contact details (email and telephone) from UWE or the AWP apprenticeship team.

The student lead(s) must ensure these details are promptly shared with the admin team. This is critical to allow sufficient time for honorary contracts and system access to be set up before the placement begins.

2. Eligibility for Shifts

Only UWE students with an active AWP bank contract are permitted to undertake shifts within the IAP, in line with the agreement with UWE.

3. Initial Contact and Support Planning

The student lead(s) will:

- Make initial contact with the student to discuss the placement and confirm any additional support needs.
- Confirm the start date and communicate details to the student.
- Identify an additional mentor within the team to provide joint support.

4. Induction and Training

- On the first day, the student will receive a service overview.
- Within the first week, the student lead(s) will create an individual induction plan and full shift pattern for the placement.
- The induction plan must include training on CLEO and CAD within the first two weeks to maximise learning opportunities.
- Shifts should cover all service areas of the IAP and be recorded on the shadow calendar (as described above).
- For the first two weeks, the student will be paired ("buddied") with the student lead or designated team member for ongoing support.
- The induction plan must be sent to the IAP Roster inbox for roster entry and saved to the shared drive for team oversight.

5. Competency Framework and Clinical Readiness

Students will follow the same competency sign off, observation, and audit process as AWP bank staff. These must be completed promptly to ensure optimal learning.

Readiness for direct patient care will depend on the student's experience, background, and year of study. The student lead is responsible for assessing this at the start of placement and sharing the information with Team Managers and Senior Practitioners to ensure appropriate support and clarity on scope of practice.

6. Documentation and Evidence

Competency sign off documents and audit outcomes will serve as evidence within the IAP and contribute to the student's NMC competencies and mid/end placement reviews.

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Offboarding Process – Leavers

1. Notification of Resignation

Upon receipt of a formal resignation, the Team Manager must email the admin team, confirming:

- The leaving date.
- Whether the individual wishes to remain on the AWP Bank.
 - If the leaver remains on the bank, system access and honorary contracts will stay active.
 - If the leaver does not wish to remain on the IAP Bank, all access and contracts must be removed.

2. Leavers Checklist

The admin team maintains a Leavers Checklist (located at X:\IAPAdmin/Leavers Process).

This checklist must be emailed to the leaver to outline expectations prior to leaving the service.

3. Leavers Form

- The line manager must complete the Leavers Form (available on Ourspace) and email it to Payroll, HR, and E-Roster.
- If the individual wishes to remain on the bank, this must be indicated on the form and communicated to the bank coordinators.
- Note: From January 2026, staff wishing to remain on the bank will be required to complete the full recruitment process.

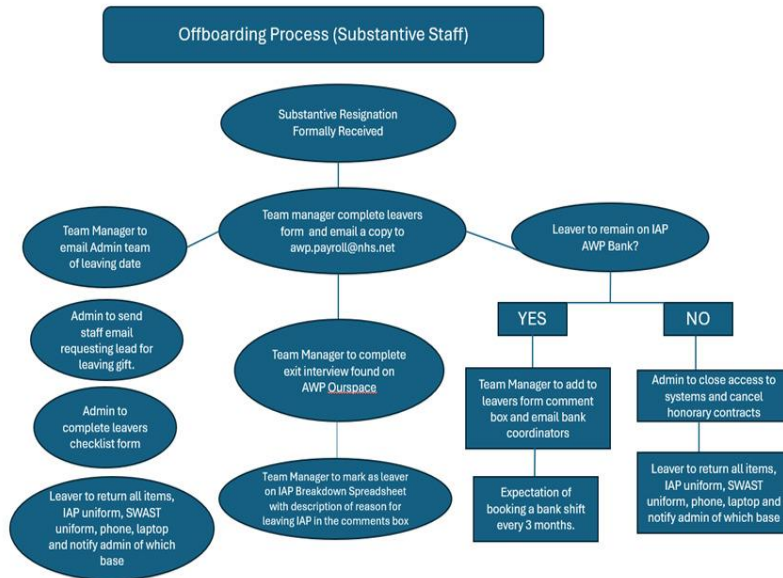
4. Exit Interview

An exit interview must be conducted between the leaver and their line manager

5. Team Notification

The admin team will email all IAP staff to identify a team member who will coordinate donations for a leaving gift.

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Monitoring & Change Register

The IAP SOP will be reviewed at least annually and more regularly to account for service changes and expansion.

Date	Version	Author	Change
17/10/2025	1.0	Nikki Solman	New Document
24/03/2026	1.1	Nikki Solman/Matthew Truscott	Reformatted document with updates to include reference to Development and Assurance Framework . Updates to include QAP role in sign-off, uniform ordering, process once checks are cleared. Reference to the probation period.