

1. JOB IDENTIFICATION

Job Title: Triage Officer

Responsible to: Team Leader - Triage

Department(s): Patient Experience Team

Directorate: Corporate Nursing

Operating Division:

Job Reference: L-CN-PET-C&FO-T

No of Job Holders: 5 WTE

Last Update: May 2019

2. JOB PURPOSE

Participate in the day to day operational delivery of the triage team in the overall processing of triaging complaints supporting the implementation of the Complaints Handling Procedure across the organisation.

Participate in the delivery of training and education related to complaints to all levels and professions within the organisation and to new members of the Patient Experience Team to ensure appropriate handling and compliance with policy.

3. DIMENSIONS

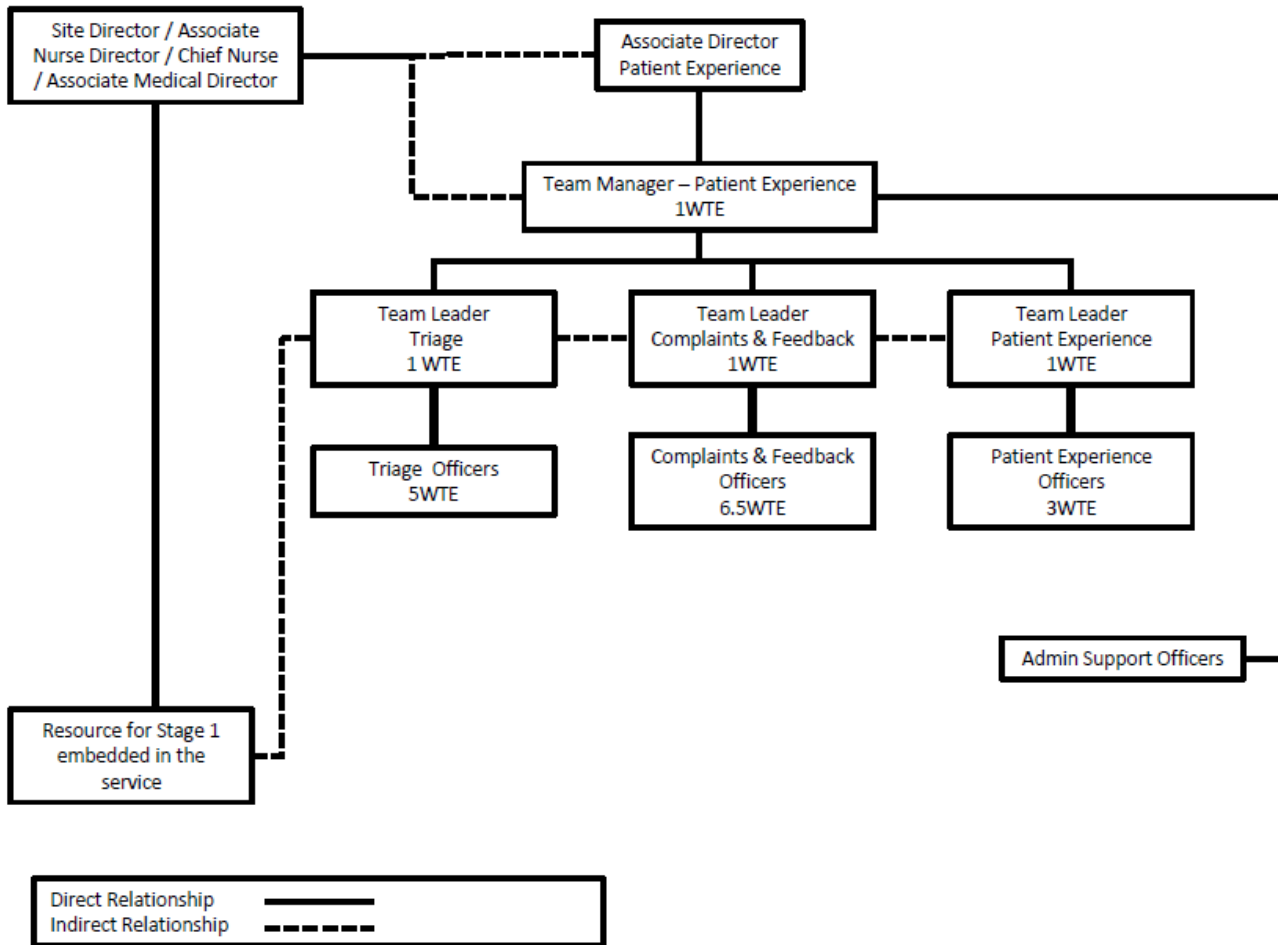
The Patient Experience Team provides leadership, advice and support to colleagues across NHS Lothian – the UK's second largest Health Authority. NHS Lothian employs over 26,000 staff with revenue expenditure of £1.4 billion, serving a population of 850,000 with both urban and rural communities across Edinburgh, West Lothian, Mid Lothian and East Lothian.

The Patient Experience Team provide support to

- All **27,000** directly employed NHS Lothian Staff
- Independent contractors (GPs, dentists, opticians, community pharmacists and their staff) across Lothian numbering in excess of **2,500**
- People who use the complaints service to provide the organisation with different types of feedback (Complainants). For the period April 2017 to March 2018 this was @ 6000 contacts and approximately 6000 telephone calls

4. ORGANISATIONAL POSITION

Patient Experience Team



5. ROLE OF DEPARTMENT

The Patient Experience Team (PET) is responsible for the implementation of the complaints handling procedure (April 2017) across NHS Lothian and elements of the patient experience agenda, This will be done via 3 work-strands: 1) Triage, 2) complaints and SPSO activities, & 3) patient experience.

PET acts as a central point for receiving patient feedback in the form of concerns, comments, complaints and compliments via letter, telephone, social media where appropriate, email, Care Opinion, local and national surveys, patient feedback external reviews and reports.

PET processes this feedback in line with the Complaints Handling Procedure (April 2017). PET provides a single point of contact for the Ombudsman and will coordinate all SPSO investigations and correspondence.

PET provides a single point of contact for Care Opinion and will work with the service to support named responders.

PET provides a coordinating function for complaints which cross a number of specialties/departments, or where an initial response and follow up have failed to resolve the issue to ensure a timely and cohesive response including a quality assurance function.

PET works with other key departments and services to share and learn from patient experience surveys / stories / feedback so that the organisation can demonstrate learning and improvement,

PET provides reports for the Board and other key committees to report activity, provide assurance, and demonstrate learning.

6. KEY RESULT AREAS

1. To participate in the day to day operational delivery of the Triage function within the Patient Experience Service, to ensure the implementation of the Complaints Handling Procedure/National policies.
2. To provide an advisory role in all aspects of triaging patient feedback (compliments, comments and complaints), ensuring they are risk assessed as per operational procedures, implemented and monitored to take account of national policy, strategies or guidance, current legislation and organisational requirements.
3. Direct the investigative leads to progress the complaint review, analysing information received to ensure an appropriate response, development of action plans for improvement, their implementation for local and organisational learning and subsequent monitoring. Ensuring that all correspondence is co-ordinated and responded to in a timely manner and in line with NHS Lothian policies and procedures, national policy, strategies or guidance and current legislation.
4. To contribute in the effective and efficient delivery of those complaints identified for early resolution. Communicating with the operational management teams, analysing information, preparing a response that responds to all of the issues raised in the complaint and in a person centred approach that is open and accessible to the complainant within 5 working days.
5. To meet with patients, their families, carers or advocates to support them to provide feedback or through the complaints and feedback process, identifying issues and negotiating realistic outcomes for them and the organisation.
6. Lead by example and act as a positive role model for all staff, promoting team working whilst managing the day to day service provision.
7. Contribute to the day to day management of the team including for supporting and participating in recruitment, induction, mandatory training, identification of learning and development needs of all members of the team through performance review and personal development plan (PDP), appropriate levels of discipline and grievance, including deputising for the Team Leader.
8. Actively contribute to the creation of an environment that supports assessment and learning of all staff providing mentorship and supervision, to enable all team members to continuously update, develop and implement current knowledge and skills to meet changing needs of the service. Deliver and contribute to teaching / mentoring / coaching sessions as required including encouraging innovation.
9. To work with a range of operational and management groups across NHS Lothian (Acute Services / HSCPs / IJBs) supporting them with a complaints function that meets the needs and expectations of complainants and staff and within national and local targets.
10. To contribute to a number of operational groups across the organisation, in particular clinical management and quality improvement teams to ensure they have access to relevant and up to date complaint and feedback information / reports so that they can be used for improvement at a local level.
11. To encourage operational teams to use the Datix Dashboard to prioritise their complaints activity to ensure all complaints are dealt with in a timely manner.
12. To work with colleagues to support staff to deal with complaints effectively by developing and updating information on the Intranet and developing and delivering complaints related training and education.
13. To link with key (and linked) services, in particular Litigation and Significant Adverse Events/Duty of Candour so that early escalation of complaints can be better linked to potential future actions.

- 14. To promote and improve the role of advocacy and support / voluntary organisations across NHS Lothian, in particular raise the awareness of this key function with staff.
- 15. To work with colleagues from the Patient Experience Team to ensure that there is robust communication and learning and sharing across the team and wider organisation.
- 16. Support NHS Lothian's values of quality, teamwork, care and compassion, dignity and respect, and openness, honesty and responsibility through the application of appropriate behaviours and attitudes.

7a. EQUIPMENT AND MACHINERY

The post holder is expected to be able to use a range of office equipment, this will include: Desktop computer, printers, photocopiers, scanners, telephone system (including call centre technology), audio visual equipment.

Filing – maintain personal and departmental filing systems.

7b. SYSTEMS

Datix - Risk management database – Complaints/feedback module used. Also may be required to access Adverse Events Module.

Trak - Electronic Patient Management system may be used to access confidential patient information with appropriate consent.

Sharepoint - Software for updating Patient Experience website

Maintaining shared drive directory

Full use of MS Office Word, Microsoft Outlook, Excel, PowerPoint, office communicator.

TURAS / PWA / Employee on Line and other systems on the staff intranet

8. ASSIGNMENT AND REVIEW OF WORK

The post holder will report to the Triage Team Leader and be responsible for managing their own workload and taking action as required. Work will be self-directed and prioritised by the post holder. They will also be required to anticipate problems, proactively manage and identify solutions.

The majority of the workload will be generated internally through the operational management of complaints handling, in particular telephone, email and letter. However work may be delegated by the Triage Team Leader where complaints information / projects may be required to be undertaken.

Work is also generated externally eg Scottish Government, MPs, MSPs where patient complaints are required to be actioned.

Performance and review of work will be undertaken in conjunction with the Triage Team Leader through the identification of individual objectives (supporting the wider team objectives), through annual appraisal, the development of a personal development plan and regular monthly meetings.

9. DECISIONS AND JUDGEMENTS

The postholder is required to analyse complex information (both clinical and non-clinical) that requires them exercise initiative, judgement and discretion in deciding the appropriate action/s to undertake and when to escalate to the Triage Team Leader, Team Manager – Patient Experience or the Associate

Director, Patient Experience eg complaint letters that raise concerns about patient safety or quality of care issues.

The postholder is responsible for identifying and interpreting matters of urgency, prioritising workload and action accordingly and referring to the operational services as appropriate. e.g. any quality of care or immediate patient care issues.

The post holder is required to accommodate unexpected and unpredictable workload demands. Problem solving and developing ways of dealing with challenges and obstacles, in particular working to fixed timescales, this will involve negotiating with senior managers e.g. Site Directors, Associate Nurse Director, where required.

The post holder will be required to support or respond to staff at every level across NHS Lothian at any time and be able to assess a broad range of complex and technical complaints information.

The post holder will be required to support patients, families and carers to enable them to give us feedback eg via the telephone or in person and to take action eg referral to the advocacy agencies or Scottish Public Services Ombudsman.

The postholder is expected to exercise judgement, compassion and diplomacy in helping NHS Lothian receive and respond to all patient feedback / complaints.

10. MOST CHALLENGING/DIFFICULT PARTS OF THE JOB

The post holder must be able to prioritise a busy workload where there will be competing demands. This will involve the successful delivery of local and national targets as well as meeting the expectations of individual members of the public.

The post holder is also expected to provide peer support to their colleagues in the Patient Experience Team. They will also need to support complainants as part of the complaints process.

Maintaining the organisation's reputation for openness while still responding quickly and effectively to the demands of day-to-day complaints and feedback or SPSO reports sometimes in relation to high profile and politically sensitive issues on a national scale eg SPSO - NHS Lothian reports being laid before Parliament.

Maintaining the organisation's reputation for openness while still responding quickly and effectively to the demands of day-to-day complaints and feedback, sometimes in relation to high profile and politically sensitive issues on a national scale eg national shortage of GPs or other locally sensitive issues.

The post holder is required to accommodate unexpected demands and problem solve, developing creative ways of dealing with the challenges and obstacles and within very tight timescales.

11. COMMUNICATIONS AND RELATIONSHIPS

The postholder is expected to communicate with a wide range of senior clinical and non-clinical staff across NHS Lothian, professional and partner organisations, media, patients, public and staff at all levels.

The following are key working relationships involving daily contact:

- Executive Directors and teams working within NHS Lothian Board
- Acute Services
- 4 Health and Care Partnerships / Integrated Joint Boards
- Royal Edinburgh and Associated Services
- Prison Healthcare

- Corporate Services including Facilities and eHealth
- Employee Relations
- Partnership
- Independent Contractors

Dealing with enquires for support from clinical and non-clinical staff at all levels in the organisation in relation to their complaints and feedback activity to ensure a thorough, robust and timely investigation that results in a thorough response letter being sent to the complainant with the agreed timescales.

Participating in meetings to provide complaints and feedback advice, information or guidance to contribute to the operational service eg Quality Improvement Teams.

External communications and relationships may include:

- Members of the public who use the services of NHS Lothian
- Scottish Public Service Ombudsman
- Scottish Health Council
- Citizen Advice Bureaus / Independent Advocacy and Advice Service
- Scottish Government
- Other external groups

12. PHYSICAL, MENTAL, EMOTIONAL AND ENVIRONMENTAL DEMANDS OF THE JOB

Physical:

- There will be a requirement for the post holder to long spend periods of time at the computer where they will need standard key board skills.

Mental:

- Concentration required when undertaking the operational component of the role including attending meetings, reading and preparing documents and reports being able to quickly access and articulate often complex medical and scientific issues.
- Keeping up-to-date with the evolving nature of patient feedback and methods of quality improvement.
- Maintaining understanding of the NHS landscape in Lothian, Scotland and the UK and how it impacts on patient experience in NHS Lothian.
- Retention and communication of knowledge and information.
- Need to communicate clearly and persuasively with staff at all levels, with the media, public, patients and other external contacts.

Emotional:

- The post holder will be in frequent daily contact with members of the public who may be irritated, angry, and / or bereaved and will be required to regularly deal with situations of an emotional or challenging nature.
- The post holder will need to support staff within the wider Patient Experience team and across the organisation who are dealing with members of the public as described above.
- The post holder may have to support members of staff seeking advice if they are the focus of negative feedback/complaints and /or subject to formal investigation.
- The ability to meet tight deadlines and maintain high standards of work whilst dealing with persistent interruptions, resulting in the constant reprioritisation of work.
- Need to react quickly to new challenges and crisis situations where accurate action is required urgently and there is a need to provide consistent communications to many different audiences internally and externally in a variety of formats.

Environmental:

- Travelling between various sites across the NHS Lothian area and, on occasions, beyond to national

meetings/events.

- Due to the nature of the role, there is high risk of verbal aggression and there may be risk of physical aggression eg complainants arriving unexpectedly at Waverley Gate to make a complaint

13. KNOWLEDGE, TRAINING AND EXPERIENCE REQUIRED TO DO THE JOB

- Degree level qualification in a clinical or non-clinical subject plus:
- Technical / specialist knowledge of national and local complaints and feedback policy and processes.
- Evidence of excellent communication both written and verbal.
- Evidence of experience/delivery of quality improvement including and working towards multiple timescales.
- Experience of report writing.
- Good understanding of the different IT packages.
- Previous experience in the NHS/customer service.
- Evidence of involvement in developing or delivering training packages.

14. JOB DESCRIPTION AGREEMENT

A separate job description will need to be signed off by each job holder to whom the job description applies.

Job Holder's Signature:

Head of Department Signature:

Date:

Date:

