

The Medical Assistant Project Bromley CEPN

PILOT AIM

Bromley, along with Bexley and Lewisham planned to pilot the introduction of the Medical Assistant, investigating whether an apprenticeship, modular or one-off training course would be the most appropriate approach alongside applying the Care Navigator competency framework to support the development of this role. The term Care Navigator is used in this pilot as it was felt that the Care Navigator core competencies were generic enough to map against the framework of the Medical Assistant pilot. These core competencies are:

1. Effective Communication

Excellent communication underpins person-centered care and helps build lasting, trusting relationships. Care navigation requires people to be able to communicate effectively, in verbal and written form, with a wide range of people from different cultural and organisational backgrounds, including health, social and voluntary sectors.

Under the essential core competencies, an individual will be able to:

- Communicate clearly, sensitively and effectively with patients, family members and other professionals.
- Communicate in a warm and empathic manner.
- Maintain a calm and sensitive approach when dealing with people in distress.
- Perform a basic holistic assessment of patients' needs over the telephone and face-to-face.
- Writes and maintains clear, accurate records of patient information in a variety of formats (i.e. electronic and paper).
- Present information clearly and effectively when speaking with others.
- Adapt communication style and method to best support patient preferences and need
- Demonstrate the importance of cultural factors in communicating with people.
- Understand and use common social and health care terminology



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2. Enabling access to services

Care navigation involves signposting and enabling people to access appropriate services, based on their needs and preferences, from a wide range of organisations and sectors. This may not necessarily be best met by traditional health or social service professionals. The 'local wisdom' of available services should be built up by those in navigation roles and teams, with a spirit of 'persistent and positive curiosity'.

Under the essential core competencies, an individual will be able to:

- Access up-to-date, accurate information for a range of services to provide support for an individual and carer.
- Understand local referral arrangements/pathways for holistic support from a wide range of sectors.
- Signpost and facilitate contact for the patient/carer to appropriate services, with consent of the individual.
- Demonstrate initiative in seeking contacts with relevant local services.
- Take a proactive, problem solving approach in helping support people to connect and access services.

3. Personalisation

Personalisation is a term more commonly used in social care and is applicable to all service sectors. Personalisation is about taking an approach which supports a person's choice, wishes and needs as far as possible, enabling them to be in control of their own life. Care navigation seeks to provide support and care, defined by a person's holistic needs, not simply standardised to their condition or diagnosis. Support is tailored to the needs and aspirations of the individual.



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Under the essential core competencies, an individual will be able to:

- Determine the patients' basic support needs accurately over the telephone or face-to-face.
- Act in a way that acknowledges peoples' expressed beliefs, preferences and choices.
- Help people to identify and use their strengths and resources to achieve their own well-being goals.
- Demonstrate a positive, solution-focused approach to promote independence and wellbeing.
- Demonstrate basic understanding of appropriate financial matters relevant to personalised support (e.g. personal budgets)

4. Coordination and Integration

Care navigation will involve coordination of care and support, to ensure a person's experience across health, social and voluntary services is as 'seamless' as possible. All people involved in support, including patient/carer should know who a key point of contact for help is and who is responsible for their care. This is especially important and must be timely, when there are significant changes in a person's needs e.g. sudden deterioration in health or transition of care between providers.

Under the essential core competencies, an individual will be able to:

- Share relevant information, decisions and discussions made by health and social care teams, with the patient (and carer if appropriate).
- Understand the principles of integrated care and support.
- Provide information on when and how the patient (and carer) can contact the relevant person/professional.
- Update and share appropriate information with a supervisor and professionals/agencies in a timely manner
- Implement key action points from care plans/meetings, with supervision.
- Show initiative to re-refer a person if known to services when appropriate contact has not occurred, e.g. with the multidisciplinary team lead clinician.



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5. Building and Sustaining Professional Relationships

Care navigation is a person-centred approach, therefore if care and support truly wrap around a person's needs, integrated support must cut across boundaries and reach out to wider agencies within health, social and voluntary sectors. Relationships underpin effective inter-boundary working and are skills people in navigation roles need to develop. The ability to engage and sustain key working relationships is fundamental to work with patients, their family and with multidisciplinary team members.

Under the essential core competencies, an individual will be able to:

- Build and work to sustain trusting, professional relationships with patients and their wider support network.
- Recognise when and how to close professional relationships with patients and their carers.
- Maintain a clear sense of role and responsibility within a team.
- Be supportive and helpful towards other team members.
- Relate to and work with clinical and non-clinical staff in other organisations, building constructive relationships across sectors.
- Value the roles of key others working within and beyond the organisation.

6. Knowledge for Practice

Care navigation is a person-centered approach, therefore if care and support truly wrap around a person's needs, integrated support must cut across boundaries and reach out to wider agencies within health, social and voluntary sectors. Relationships underpin effective inter-boundary working and are skills people in navigation roles need to develop. The ability to engage and sustain key working relationships is fundamental to work with patients, their family and with multidisciplinary team members.



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Under the essential core competencies, an individual will be able to:

- Demonstrate awareness and basic understanding of safeguarding vulnerable adults, end of life care, the needs of older adults and mental health conditions and symptoms (including dementia).
- Be aware of the concept of mental health crisis, potential impact on a person's behaviour and seek timely appropriate help.
- Demonstrate awareness of common long term physical and mental health conditions which impact on a person's well-being.
- Understand the basic principle of self-care for people with long term conditions.
- Appreciate where the organisation fits within the boarder of the NHS context and social care systems.
- Understand the importance and purpose of health promotion

7. Personal Development and Learning

Individuals need to be committed to lifelong learning and enthusiastic to apply new knowledge and skills. People who are in care navigation roles learn significantly through experience and working within local contexts – therefore reflection on practice, for the individual and as teams are of core importance to personal as well as service development.

Under the essential core competencies, an individual will be able to:

- Demonstrate willingness to learn and develop within the role.
- Show responsibility for self-reflection and personal development.
- Understand and engage with the process of appraisal.



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8. Handling Data and Information

Accurate and accessible information and data underpins effective care navigation. Failures in communication between organisations, sectors and patients/carers can lead to disjointed and poor care. Individuals who work to provide effective care navigation need to be able to appropriately use relevant electronic records, databases to access, input, store and retrieve information. Data is also important for service evaluation improvement.

Under the essential core competencies, an individual will be able to:

- Access, input to and use data from appropriate electronic records, databases and spread sheets.
- Use appropriate technology and resources to find and process information.
- Apply the principles of data protection working within legal limitations with access and storage of data.
- Understand and adhere to data standards and confidentiality specific to the organisation.
- Prioritise workload using time and resources effectively.
- Understand the principles of audit and quality improvement.
- Be organised in performing administrative tasks (including appointments, diaries, patient registers)
- Maintain an up-to-date 'directory' of local services

9. Professionalism

Professionalism can be challenging to describe or define. For care navigation, core competencies which attempt to capture some essence of professional behaviour, attitudes and attributes are summarised here. These are rooted in the ethical, moral and legal aspects of care and support, grounded in the principles of patient-centered care. Commitment to develop expertise, selfawareness, limitations of scope of practice and working with integrity are some important features. This domain features cross cutting competencies at all levels (essential, enhanced and expert) for care navigation.



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Under the essential core competencies, an individual will be able to:

- Demonstrate a non-judgmental and respectful attitude toward others.
- Act in ways to promote values of equality and diversity.
- Be emotionally resilient and remain calm under pressure.
- Manage stress with healthy coping mechanisms.

The training was aimed at those working within health and social care who had exposure to patients, carers, relatives, and other health professionals, regarding services and information available to them.

The Workshops Included

Workshop 1: Introduction

- Introduction
- Role of an administrative medical assistant
- Clinical governance
- Supervision
- Nature of the pilot – evaluation

Workshop 2: Medical Terminology

Workshop 3: Understanding the legal context of a practice

- Clinical governance
- Understanding scope of practice
- Managing risk

Workshop 4: Notes Summarising

Workshop 5: Effective Communication

- Dealing with conflict
- Difficult conversations
- Resilience
- Confidence

Workshop 6: Coding

Workshop 7: Reading and Actioning documents



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Curriculum Design

To ensure the programme met the needs of Primary Care, Bexley and Bromley CEPN:

- Carefully reviewed each module to ensure the delegates were able to reference the requested evidence which is relevant to their role and practice
- Worked closely with the apprenticeship provider to ensure they appreciate the context of general practice and diversity of the delegates participating
- Each learner received a brand-new laptop with office and security installed to support their learning

What the training included:

- The principle of communication
- The principles of business administration
- The healthcare environment
- Resolving administrative problems
- Producing business documentation
- Monitoring information systems
- Managing risk
- Understanding the legal context of your business
- Encouraging innovation

What qualification they receive if they complete the pilot

A Level 3 BTEC Diploma in Business and Administration

What the learners will be able to do once the training is completed

On completion of this training, depending on the makeup and priorities within the practice, we believe this learning will support members of the administrative team to:

- Work closely with GPs looking to reduce the amount of non-essential administrative tasks typically undertaken by a GP or a nurse.
- Specialise in a pathway/cohort of patients and develop new protocols and systems to support this area
- Lead quality improvement projects.
- Take on more tasks typically undertaken by a practice or administration manager.



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Recruitment of Participants:

To promote this opportunity, we sent correspondence to all Bromley practices outlining the initiative and inviting them to an introduction session. This session was supported by the Project Manager Tara Humphrey, Hawk Training Provider and the Clinical Lead, Dr Chris Fatoyinbo who all discussed the planned approach of the pilot and gathered essential feedback from Practice Managers and staff as to how to support them if they signed up to the diploma. We gathered expressions of interest and this was followed up by the Project Manager and Hawk training team.

Marketing the Programme

To market the new programme, we used:

- The Bromley CEPN website
- Bromley CCG news bulletin
- Information session

The introduction to the Business and Admin Diploma took place on 28th September. The workshop was well attended with the learners engaging with the training provider and asking any questions they had about the Diploma. We were able to distribute the laptops to each learner at this introduction workshop.

8 learners were signed up at the start of the programme to complete the Level 3 Business and Administration Diploma. One learner withdrew from the pilot early on as they had a change in job role and working hours and felt they could not commit to the diploma at the moment. Two additional learners withdrew at a later date due to work commitments and changes in their role.



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WORKSHOP EVALUATIONS

Workshop 1: Introduction

Core Competency – Coordination and Integration, Building and Sustaining Professional Relationships, Effective Communication, Personal Development and Learning and Professionalism

This session was delivered by Hawk Training Provider, Jackie Tavabie from HEE and GP leads from Bromley. It was well attended by learners and their Managers and focused on the role of an administrative medical assistant, the clinical governance surrounding this role and the supervision required. It was an opportunity for the learners and Managers to express their hopes and wishes for this training and fully understand what was expected from the learner and the supervisor.

“I hope to gain more confidence and knowledge and broaden my skills to perform my role at a higher standard”

“I hope that the programme will enable the employee to be more confident in their abilities and take on a lead administrative role within the practice”.

We were able to distribute the laptops to each learner and Hawk made arrangements for the first tutor support session to take place in the practice with each learner.



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WORKSHOP EVALUATIONS

Workshop 2: Medical Terminology

Core Competency – Handling Data and Information, Personal Development and Learning and Professionalism

This workshop was delivered by [Medical Services](#) and was met with very positive feedback. The attendees reported that this workshop aided them in their understanding of certain medical terminology and helped build their confidence when attending multiagency meetings and dealing with clinical correspondence.

“Excellent workshop that will help me so much in my role at the practice. I feel more confident dealing with medical correspondence and sitting in on meetings”



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WORKSHOP EVALUATIONS

Workshop 3: Understanding the Legal Context of a Practice

Core Competency - Knowledge for Practice, Building and Sustaining Professional Relationships, Handling Data and Information, Coordination and Integration and Professionalism

This session was delivered by Dr Natasha Hoare and Dr Nicola Payne and was met with very positive feedback. All participants reported having a greater understanding of the legal context of practice after the session and felt that the material was relevant to their job role and appropriate for their level of knowledge.

“Very engaging and knowledgeable, I found the information that I learnt today very useful for my new job role”.

After this session we invited the Diploma GP Mentors and Practice Managers to attend a session delivered by Dr Chris Fatoyinbo. Dr Chris discussed how the role of the Medical Assistant could be used in the practice and the tasks that could be undertaken by these delegates once they completed their training. Only a few mentors could attend but they reported finding this session extremely helpful.



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WORKSHOP EVALUATIONS

Workshop 4: Notes Summarising

Core Competency – Effective Communication, Knowledge for Practice, Handling Data and Information, Coordination and Integration and Professionalism

This was another session delivered by [Medical Services](#) and was fully booked with a large waiting list. Learners reported that this was a very enjoyable and interactive workshop that really supported their work in the practice. The workshop continued and supported the Medical Terminology workshop and linked well with their previous learning. This session also discussed processes and procedures that should be in place in their practice and gave them the knowledge to pick up on systems that may be dated. Due to high waiting list numbers, this workshop was repeated again (see appendix 2).

“Summarising Protocol – not sure if ours is up to date and this was a good insight for what to check for. I will take this learning back to my Practice and follow up”



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WORKSHOP EVALUATIONS

Workshop 5: Effective Communication

Core Competency – Effective Communication, Knowledge for Practice, Handling Data and Information, Coordination and Integration and Professionalism

This workshop was delivered by Jo Wilson from [Beyond Training Solutions](#) and was met with very positive feedback. The participants felt the sessions provided them with many useful techniques for dealing with challenging behaviour in the workplace as well as communicating effectively with other staff members and patients. The participants gained the knowledge of non-verbal communication techniques and the importance of using varying communication techniques for different patients and colleagues.

“This workshop has given me the skills to support effective communication in my practice and helped me understand how different people perceive information”



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WORKSHOP EVALUATIONS

Workshop 6: Coding

Core Competency – Knowledge for Practice, Handling Data and Information, Coordination and Integration

This workshop was delivered as a half day workshop and due to large uptake and an extensive waiting list we organised for another half-day session to run consecutively to this (see appendix 2). This session was delivered by [Thornfields Primary Care Training Specialists](#) and focused on the transition from Coding to SNOMED. The learners reported that this workshop helped support the extra responsibilities this role would bring and that although quite a difficult skill to develop this session had supported that development.

“An informative and positive session that has helped with the transition from Coding to SNOMED”.



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WORKSHOP EVALUATIONS

Workshop 7: Reading and Actioning Documents

Core Competency – Knowledge for Practice, Handling Data and Information, Coordination and Integration and Enabling access to services

This was the final session of the programme and delivered by [Practice Unbound](#) as a Correspondence Management workshop. This session helped tie together learning from the previous sessions on Medical Terminology, Notes Summarising and Coding with an expectation to have a clear understanding of the basic Read Coding and medical terminology needed to enable them to fully contribute to the practical application of Correspondence Management.

Feedback suggests that this was achieved with learners reporting that the session drew on all skills taught in previous workshops and really summarised their learning to date in this training programme.

“A fantastic session to end with. It really summarised all that we have learnt in previous workshops and put it to the test”.



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What were the benefits of participating in this pilot?

We are trying to create a programme of training and support for administrative staff that provides:

- a further understanding of the health sector
- transferable business, administration and problem-solving skills
- an education pathway to support staff into leadership and management

How were the learners supported during this pilot?

- The training programme was fully funded by the CEPN.
- Tutors came into the learner's workplace before the apprenticeship began to gain a better understanding of the learner's role in general practice which helped the tutors better support the learners on the course.
- The tutor and learner have a monthly coaching session which usually lasts about 2 hours. This helps the tutor provide any feedback on previously completed work and helps support the learner with future units. It is helpful for the line manager to be present for 10-15 minutes during these coaching sessions to also provide feedback, support and evaluate on how the pilot is progressing.
- Each practice should provide a GP mentor and practice management support to the applicant of this training
- On completion of the monthly workshop schedule, study sessions have now been organised for the remainder of the pilot (see appendix 3). These sessions are fully funded by the CEPN and delivered by Hawk Training Provider and their Functional Skills Team. The purpose of these sessions are to support and guide the learners through their functional skills exams and on completion of the functional skills these sessions will support assignment and project completion



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Lessons Learnt:

1. Practices were put off by the apprenticeship length and maths and English assessment. In hindsight, we perhaps gave too much information concerning the assessment criteria for the apprenticeship which practices found confusing
2. The attention to detail in relation to carefully designing each workshop with the training providers and understanding of each diploma module and the assessment criteria with Hawk has been pivotal.
3. It was difficult to map all of the Care Navigator core competencies to the supporting workshops for this pilot, but they could be evidenced in the learners individual apprenticeship assignments and projects.
4. Due to workshop cancellations by the training providers, the workshop schedule needed to be changed which took longer than anticipated and impacted on the workshops being delivered after the anticipated project closing date. We also had an issue with tutors changing half way through the programme which caused some distribution to the learners. It is vital for the CEPN to remain in regular contact with the training provider to ensure all the needs of the learners are being met and the apprenticeship is progressing to schedule.
5. Only 3 GP mentors and Practice Managers were able to attend the information session delivered by Dr Chris Fatoyinbo on the 25th January 2018. We will look to run this session again in the hope that more mentors and managers can attend and see how the role of a Medical Assistant can be implemented into their practice.
6. A CEPN representative attending every workshop was key and provided support to the trainer to help gauge the receptiveness of the delegates and slightly shift gears when required.
7. Meeting with every trainer before each workshop was a great way to ensure each session complimented each other and fully delivered our training requirements.
8. Being flexible and listening to the needs of the delegates – adding workshops, changing session outlines helped mould this programme.



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Recommendations:

- Having a CEPN representative at each session really added value to the programme and it is important that this representative remains in regular contact with the training provider to identify any issues or concerns.
- A Speed Reading workshop is now being considered as a late addition to the programme. This is a request from the apprentices to help support their role in practice. Discussions are taking place with Bexley CEPN to run this together in September 2018.
- Organise study sessions from the start of the programme and alternate between the workshops. This will help apprentices tackle the functional skills section of the diploma from an early point of the programme and identify any support needed.
- The CEPN should maintain contact with this pilot of learners to see how their role develops and identify any additional support that could be given.
- The CEPN should reach out to these learners in 6 months' time to see how the role has impacted the surgery and patients. Impacts are often not evident immediately after training and time will show the true positivity's of the programme.



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Final Thoughts:

This programme is still ongoing with apprentices due to complete in April 2019. Currently the programme is being positively received and exceeding the expectations of the participants

Whilst it is too early to ascertain the long-term impacts of this training, it does appear that the Business and Administration Level 3 Apprenticeship has supported the learning of this new role and has been tailored accordingly.

To truly understand the impacts of this pilot, we recommend going back to the learners and their managers on completion of this programme and again six months' on from this to continue the evaluation of this training.

Teaming this programme with an apprenticeship has meant that the programme will have a robust measurement and evidence of learning with learners receiving a nationally recognised qualification they can take forward in their careers.



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APPENDIX 1: WORKSHOP TIMETABLE

Date	Event	Details
28th September 2017	Workshop 1: Introduction <ul style="list-style-type: none"> • Role of an administrative medical assistant • Clinical governance • Supervision • Nature of the pilot – evaluation 	Presenters: Jackie Tavabie (HEE) GPs from Bexley Hawk tutor
26th October 2017	Workshop 2: Medical Terminology	Cancelled
23rd November 2017	Workshop 2: Medical Terminology	Medical Services
25th January 2018	Workshop 3: Understanding legal context of practice <ul style="list-style-type: none"> • Clinical governance • Understanding scope of practice Managing risk	Natasha Hoare and Nicola Payne
22nd February 2018	Workshop 4: Notes Summarising	Philippa Greene – Medical Services
22nd March 2018	Workshop 5: Effective Communication <ul style="list-style-type: none"> • Dealing with conflict • Difficult conversations • Resilience • Confidence 	Jo Wilson – Beyond Training Solutions
19th April 2018	Workshop 6: Coding Half-day session in the morning	Thornfield's Primary Care Training Specialists
24th May 2018	Workshop 7: Reading and Actioning documents	Practice Unbound



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APPENDIX 2: ADDITIONAL WORKSHOPS TIMETABLE

Date	Event	Details
13 th April 2018	Notes Summarising	Philippa Greene – Medical Services
25 th April 2018	Effective Communication <ul style="list-style-type: none"> • Dealing with conflict • Difficult conversations • Resilience • Confidence 	Jo Wilson – Beyond Training Solutions
19 th April 2018	Coding	Thornfield's Primary Care Training Specialists

APPENDIX 3: STUDY DAY TIMETABLE

Date	Topic	Trainer
25 th July 2018	Speaking, Listening & Communication	Hawk Training Provider
4 th September 2018	English Test	Hawk Training Provider
2 nd October 2018	Maths Support	Hawk Training Provider
30 th October 2018	Maths Support & Test	Hawk Training Provider
20 th November 2018	ICT Support	Hawk Training Provider
11 th December 2018	ICT Support & Test	Hawk Training Provider



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For The Primary Care Navigator Project Bromley CEPN



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