Integrated Urgent Care Shift Manager Audit Framework

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1.4	Hollie Gage	26/08/2021
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3rd March 2025	Lucy Grinnell (Head of IUC)	3rd March 2026

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IUC Shift Manager Handler Audit Framework

Introduction

The Shift Manager is responsible for offering leadership, direction and operational management to the Integrated Urgent Care service during the course of an operational shift.

Audits will be performed to ensure that a high level of support and leadership is being demonstrated to enhance the Quality Care and Patient Care on every shift. This will allow us to meet the aims of our service:

- The shift is able to deliver high standards of patient care in line with the key performance indicators
- Resources (clinical, operational, facilities and mobile) are utilised to the best effect throughout the shift
- The Shift Manager gives the shift a feeling of being safe and well managed. Clinicians and operational staff should enjoy the experience of working with Severnside IUC and this will be achieved if the Shift Manager is anticipating potential problems and acting early and taking control
- The attitude of the staff is crucial as they are representing Severnside IUC at each treatment centre and on the telephone. The Shift Manager should be able to give good direction and be able to support staff at any base with any issues.

Shift Managers in all roles; Co-ordinating, Assistant, Evening and Overnight will be audited bi-monthly, with two shifts and the correlating shift reports being reviewed for each Shift Manager. Shift Managers will be audited against 13 criteria and will come out with an overall percentage score for each shift which will demonstrate their performance level.

Auditing Process

Audit criteria will differ depending on the type of shift manager shift being audited. The three different audit criteria groups refer to:

- Co-ordinating shift manager, Overnight shift manager, evening shift manager
- Assistant shift manager
- Weekday shift manager

The criteria for each of these audits is as follows-

CSM/ESM/ONSM (Maximum 24 points)

Effective communication
Welcome instant message sent at the start of the shift
Follow up instant messages to team throughout the shift
Content of messaging is appropriate, factual and sets a positive tone for the shift
Shift Manager report completion
Hourly volumes completed (MINIMUM x4 evenings, x6 weekend CSM, x7 overnight)
OPEL information submitted on Faculty

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Factual shift overview provided
Clearly requests where any follow up actions are required on shift report
Confirms Learning Event and IT support forms submitted (when issues highlighted on SMR)
Process application
Opel actions considered, implemented and evidenced (if appropriate)
Spot checks/counts
Checks Patient Forms and Desktop, as well as Referral, One-on-one and Consultation accounts at the start and end of shift
Completes all required checks- including drug checks, headset count, Sesui checks, manual prescriptions, Osprey fobs, desktop and patient forms folder, email accounts
Checks the DoS times at the start of the shift (MH CAS and ED)

ASM (Maximum 16 points)

Effective communication
Welcome instant message sent at the start of the shift
Follow up instant messages to team throughout the shift
Content of messaging is appropriate, factual and sets a positive tone for the shift
Shift Manager report completion
Factual shift overview provided, including call handling management
Clearly requests where any follow up actions are required on shift report
Confirms Learning Event and IT support forms submitted (when issues highlighted on SMR)
Identifies appropriate base or car feedback
Staff break report and all necessary checks completed

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WDSM (maximum 24 points)

Effective communication
Welcome instant message sent at the start of the shift
Follow up instant messages to team throughout the shift
Content of messaging is appropriate, factual and sets a positive tone for the shift

Shift Manager report completion
Hourly volumes completed (MINIMUM x8 weekday)
Factual shift overview provided
Completes the DoS management spreadsheet as appropriate
Clearly requests where any follow up actions are required on shift report
Confirms Learning Event and IT support forms submitted (when issues highlighted on SMR)

Spot checks/counts
Checks Patient Forms and Desktop, as well as Referral, Oneoneone and Consultation accounts at the start and end of shift
Completes all required checks- including drug checks, headset count, Sesui checks, manual prescriptions, Osprey fobs, desktop and patient forms folder, email accounts
Checks the DoS times at the start of the shift (MH CAS and ED)

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Scoring

The various criteria are all worth a maximum of 2 points. 2 points is awarded if criteria is fully met, 1 point is awarded if criteria is partly met and 0 points awarded if criteria is not met. Overall points are totalled and a percentage score assigned.

The overall scores are colour-coded as follows:

100%	**Exemplary performance – feedback provided**
90-99.9%	**Good performance – feedback provided**
80-89.9%	**Work required on weaker areas – feedback provided and a further 2 shifts audited the following month to review for improvement.**
<80%	**Follow up from Line Manager and plan to improve performance agreed.**

Feedback

Shift Managers will receive feedback on their audits bi-monthly via email. This email will contain the scoring breakdown and overall score of each call audited, as well as the overall average score across all Shift Managers, in comparison to target performance (95%).

There is also a 'comments' column where specific feedback can be addressed. The Line Manager of each Shift Manager (where this is not the SML) will be copied into the feedback email so that they can keep track of their team member's progress and can address feedback with them.

Roles and Responsibilities

ROLE	NAME	RESPONSIBILITY
Team Manager (Shift Manager lead)	Hollie Gage	To carry out monthly audits for all Shift Managers To maintain database and collate the results of each audit To attend monthly QPR Meeting and report on Shift Manager performance To provide feedback to members of team and arrange training if necessary
Team Manager	Assigned	To assist in further training of Shift Managers causing concern. To occasionally assist the Workforce Lead with the auditing process
Head of People Team	Mike Duncan	To support in the Formal Performance Management process.

Version Control

Date	Version	Author	Change Details
12.02.2024	1.1	Lucy Grinnell	Addition of new version table at the beginning, document title and version number in header, and change table.
26.02.2024	1.2	Hollie Gage	Amended names, auditing timeframe and some of the audit criteria.
25.06.2024	1.3	Hollie Gage	Addition of target performance inclusion in feedback emails
05.02.2025	1.4	Hollie Gage	Updated criteria added (auditing process section)