

Prioritisation and booking face to face assessment in IUC (appointments and home visits)

Principles

- 6 hours is traditionally - but inappropriately - designated as 'routine'. Seeing any patient within 6 hours in primary care reflects a very prompt response to the clinical problem. Genuine clinical need for face to face (F2F) assessment within 2 hours is infrequent, but it is important that we can provide this when it is required.
- Therefore **6 hours should be the default timeframe** for all appointments and home visits triaged by IUC clinicians. It is clinically appropriate for the vast majority of patients requiring face to face assessment following triage in IUC to be seen within 6 hours. Please ensure that the case prioritisation is set to 6 hours when forwarding cases.
- This guidance complements the [home visit policy](#), which defines patients who are eligible for home visits and those who are not.
- A home visit or appointment within 2 hours (urgent), is *only* appropriate if the patient is:
 - **Either** rapidly deteriorating
 - **And/ or** acutely/ significantly distressed
 - **Or** there is other pressing, urgent clinical need
 - **And** an emergency/ 999 response is not required (IUC is not an emergency service, so emergency appointments or visits are never appropriate).
- This will ensure that 2-hour appointment and visiting capacity is reserved for patients who truly require this, and therefore improves patient care and safety in the service.
- Whether the face to face assessment is 2 hours or 6 hours, the service must ensure that 95% of patients' consultations (visit or appointment) have started within the target timeframe.
 - For patients seen at the Treatment Centre, please ensure that you enter the patient's Adastra record when you call the patient through and remain within the case for the duration of your consultation.
 - At a home visit, please ensure you click 'start' before seeing the patient. This ensures that the consultation start times are accurate.
- Once updated, Clinical Guardian will be able to see the timeframes for F2F assessments you have triaged. We have asked that Clinical Guardian feeds back to clinicians if the prioritisation does not align with this guidance.
- We recognise that a large number of urgent appointments are arranged by NHS111, and we are working with commissioners to feedback about the Pathways assessments (which are determined nationally and cannot be changed locally).

Full information and guidance

Please turnover for the full summary of the clinical criteria for face to face assessment within 2 hours, and the associated triage requirements. This table also includes details about booking appointments, arranging home visits and seeing patients face to face (visit and appointments) depending on case prioritisation.

Frequently asked questions

1. **What about patients/ carers/ HCPs collecting prescriptions for controlled drugs and/ or requiring completion of a community drug chart?** The same rules should apply. If the patient is reported to be acutely distressed or rapidly deteriorating, and the medication is needed to alleviate suffering, then the case should be urgent. Such situations are rare. The vast majority of CD scripts/charts should be within a 6-hour timeframe, with some common-sense application in relation to, for example, DN availability and pharmacy opening hours. In order to minimise excessive waits for carers/ relatives or HCP colleagues collecting prescriptions/ drug charts for palliative patients, the host will guide you to prioritise these cases if they have been waiting for longer than 10 minutes.
2. **What if the patient/ carer/ parent's concern/ distress is greater than your clinical concern following triage?** This can be difficult. Carefully explore the details of the concern(s) to ensure that you are not missing important/ relevant clinical information. Please remember that a 6-hour appointment still represents a prompt response to the clinical need. If you are confident that the clinical picture does not meet the urgent criteria then please be appropriately reassuring to the patient/parent/carer and it is probably appropriate to liaise with the WACCs to see the patient in the "soon end of routine" (2-4 hour) timeframe.

Arranging appointments and home visits for patients triaged in IUC

F2F within 6 hours (default timeframe for most patients)

F2F within 2 hours (urgent)

Clinical indication

- Default timeframe if patient requires face to face primary care assessment before own GP is open.
- All requests for home visits must meet the home visit eligibility criteria outlined in the [home visit policy](#).
- Occasionally, cases are not urgent but warrant face to face assessment at 2-4 hours rather than 6 hours. These cases should be categorised as routine (see additional information re documentation below).

Only if patient is:

- **Either** rapidly deteriorating
- **And/ or** acutely/ significantly distressed
- **Or** there is other pressing, urgent clinical need
- **And** an emergency/ 999 response is not required

Requests for home visits must also meet the eligibility criteria defined in the home visit policy.

Triage documentation

- Focused, relevant clinical details to aid the face to face clinician's assessment.
- See [home visit policy](#) for full guidance about triage documentation for home visits.
- If a patient requires assessment sooner than 6 hours, but not within 2 hours, please amend the first line of your notes to request "within 4 hours". Your triage notes should log the rationale for this timeframe.

- As outlined for 6-hour cases.
- **And** document rationale for 2-hour timeframe in triage notes. This should reflect the defined criteria above, or clear exceptionality if criteria not met.

Arranging an appointment

Forward the case for "PCC clinician", check the prioritisation is set to 6 hours/ routine.

Book into appointment if slot available within the 6-hour timeframe. If not, either

- [forward case to the WACCS using the Admin button on Adastra](#) consultation screen. Advise the patient that a colleague will call them back to provide an appointment time and location. Please do not suggest a time and/or Treatment Centre the patient will be seen at, as this may not be possible when the WACC calls back.
- or you can ring the WACCs to agree an appointment, and ring the patient back.

Forward the case for "PCC clinician", check the prioritisation is set to 2 hours/ urgent.

Open appointment book, and book appointment if slot available within the 2-hour timeframe. If not,

- ring the WACCs to discuss availability and agree appointment time within timeframe. The WACCs will ask you to confirm that the case meets the clinical criteria for an urgent appointment, and that you have documented the justification in your triage notes.

	F2F within 6 hours (default timeframe for most patients)	F2F within 2 hours (urgent)
Arranging a home visit	Forward the case for “home visit”. - Check the prioritisation is 6 hours and change this if necessary. - Advise the patient of the 6-hour timeframe, provide interim safety netting advice and give the patient line phone number to call back if needed (0117 332 0653). - If your request is for a 2-4 hour timeframe, please amend the first line of your notes to reflect this, including the clinical justification. Then ring the WACC to alert them to this timeframe. - The WACC will check all visit requests to ensure that the patient meets the home visit eligibility criteria outlined in the home visit policy.	Forward the case for “home visit”, - Check the prioritisation is urgent and change this if necessary. - The case will be passed to the WACC who will check that the rationale for the urgent visit has been documented, and contact you if this is not the case. - The WACC will check all visit requests to ensure that the patient meets the home visit eligibility criteria outlined in the home visit policy. - Advise the patient of the 2-hour timeframe, provide interim safety netting advice and give the patient line phone number to call back if needed (0117 332 0653).
Seeing patients at the Treatment Centre	- Patients should be seen in time order. - Ensure that you enter (and stay in) the patient’s Adastra record when you call the patient through. - There may be occasions when the Hosts guide you to prioritise cases which are near, or at, their target time to be seen. Please follow their requests/ guidance. - If two patients have urgent appointments at the same time, please prioritise cases which are red for KPI performance. - Similarly, if two patients have appointments at the same time and one is a 2-hour (yellow) case, please prioritise the 2-hour case. - HCPs or relatives/ carers collecting prescriptions/ drug charts for palliative patients will be prioritised if they have been waiting for more than 10 minutes.	- Patients should be seen in appointment time order. - Ensure that you enter (and stay in) the patient’s Adastra record when you call the patient through. - There may be occasions when the Hosts guide you to prioritise cases which are near, or at, their target time to be seen. Please follow their requests/ guidance. - If two patients have urgent appointments at the same time, please prioritise cases which are red for KPI performance. - Similarly, if two patients have appointments at the same time and one is a 2-hour (yellow) case, please prioritise the 2-hour case. - HCPs or relatives/ carers collecting prescriptions/ drug charts for palliative patients will be prioritised if they have been waiting for more than 10 minutes.
Seeing patients at home visits	Ensure that you (or the driver) enter your arrival on Adastra when you get to the address. Ensure that you also enter (and stay in) the patient’s Adastra record at this point. See home visit policy guidance.	
Information and contact numbers	Home visit WACC: 8am – 11pm Weekends/bank holidays - 0117 937 0007 Overnight and Weekday evening - 0117 903 0016 Appointments WACC: 8am – 11pm Weekends/bank holidays - 0117 937 0005 Overnight and Weekday evenings - 0117 903 0016 SevernSide Patient Line 0117 332 0653 SevernSide Professional Line (HCPs only) 0117 244 9283 How to book routine appointments using the Admin button Home visit policy	