

Primary Care Workforce Team

# Receptionists' Competency Booklet

## Standard Level





## Competency Areas

1. Telephone Calls & Messages
2. Greeting Patients
3. Appointments
4. Prescriptions
5. Registration
6. Inputting Data
7. Distributing Information
8. Handling Mail
9. Filing Systems
10. Stock Control
11. Home Visits
12. Emergency Situations
13. Ambulance & Transport
14. Governance & Training

Name: \_\_\_\_\_

Assessor: \_\_\_\_\_

GP practice: \_\_\_\_\_



## Introduction

Hillingdon Primary Care Workforce team is delighted to have supported the Practice Managers of the HR and Training group to collate the first ever Hillingdon Receptionists' Competency Framework.

## What is the competency framework?

The framework is local guidance for the competencies that GP practice receptionists should have to carry out their roles with skills and confidence. It brings together a range of initial work areas and important tasks that receptionists are expected to carry out in their day to day roles. The framework is divided into 14 competency areas and each broad task is outlined. It is a checklist that can be interpreted to fit each individual GP practice and to work within local practice policies and procedures.

## Why is it useful?

Hillingdon's Practice Managers and Receptionists led and were consulted upon its design and content and the feedback was that it would be very useful to:

- Promote best practice amongst Hillingdon GP practices
- Enable consistency in standards across Hillingdon GP practice receptionists
- Allow receptionists to show their skills and competencies to support appraisal and career development processes
- Allow managers to identify gaps and training needs for their staff and match these skills and experience for effective working

## Who is it for?

The standard level booklet is the first in a series of three booklets that will add the competency framework for more experienced receptionists and allow career progression. Career progression may lead to senior reception work, practice management or into other practice-based staffing areas such as clinical correspondence, signposting, Health Champions, Care Coordinators and HCAs. The competencies have been classified to indicate those most important towards 'clinical correspondence' roles and those most important towards 'signposting' roles. These fit with the local programmes of training and resources for GP practices in these areas of work. The wider NHS environment is encouraging the 'Band 1-4' workforce with apprenticeships, navigator and

coordinator roles. Having a local framework to support our reception staff in developing themselves will encourage their retention in general practice and their ability to translate their skill set into any of these roles.

This booklet can be used for:

- Induction into a new receptionist role
- Consolidating the skill sets of current receptionists alongside training
- A personal record to evidence transferrable skills
- A tool for consistency of practice within and across practices

## How to use it?

This booklet has 14 competency areas with key tasks listed underneath. These can be tailored and added to but form the basis of meeting the standard level competency framework requirements. For each task or group of tasks, receptionists can tick the boxes to show they are working towards or have completed the requirements to achieve a good working standard in this subject. Sign off is by a senior member of staff and is to be given on assessing the adequate delivery of the task under observation. Observing receptionists at work and with patients and colleagues over a period of time will be the main form of assessment and sign off. But written evidence can be collated and shown where appropriate and relevant.

## Certificate of Achievement

Final sign off of all competency areas and tasks can be given by the Practice Manager and a Hillingdon certificate awarded for completion of the competency framework standard level. These certificates will be standard currency across at least Hillingdon and provide receptionists with recognition of the good work that they do in general practice every day.





Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>1. Telephone Calls and Messages (Signposting)</b>				
<ul style="list-style-type: none"> <li>Ensure confidentiality is maintained whilst receiving and making telephone calls, eg. demonstrate the ability to put the caller 'on hold'.</li> </ul>				
<ul style="list-style-type: none"> <li>Introduce yourself clearly and politely when making or receiving a telephone call. and try and ascertain what the patient "really" wants by asking:               <ul style="list-style-type: none"> <li>"Is this appointment one that can wait for a few days?"</li> <li>"Would you like me to help decide the best person to see for this appointment?"</li> <li>"Is there anything else I can help you with?"</li> <li>"What's most important for you today?"</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>Receive and make telephone calls as required as per Practice protocol</li> </ul>				
<ul style="list-style-type: none"> <li>Divert telephone calls to the appropriate member of staff.</li> </ul>				
<ul style="list-style-type: none"> <li>Take messages as appropriate and ensure the message is passed on to the appropriate member of staff.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure that no confidential information is included in any messages left for patients or on an answerphone machine.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure the telephone system is operational at the beginning and end of each day in accordance with Practice protocol.</li> </ul>				
<b>Notes:</b>				



Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>2. Greeting Patients (Signposting)</b>				
<ul style="list-style-type: none"> <li>LOOK UP, smile, acknowledge and introduce yourself - be courteous, welcoming and friendly.</li> </ul>				
<ul style="list-style-type: none"> <li>Listen, ask questions and repeat information back, if appropriate, to ensure accuracy.</li> </ul>				
<ul style="list-style-type: none"> <li>Demonstrate empathy and understanding and be able to demonstrate politeness and professionalism at all times.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure confidentiality and dignity are maintained when discussing issues with patients at the reception desk.</li> </ul>				
<ul style="list-style-type: none"> <li>Be able to recognise when a patient may be upset or may need to be taken to a 'quiet area' to discuss their issues.</li> </ul>				
<ul style="list-style-type: none"> <li>Receive and respond to routine and urgent requests for assistance from and for patients, carers and others.</li> </ul>				
<ul style="list-style-type: none"> <li>Know who to ask for help and advice for the patient, carer or yourself.</li> </ul>				
<ul style="list-style-type: none"> <li>Know how to offer and arrange a chaperone or interpreter either yourself or by referring to a more senior / qualified colleague.</li> </ul>				
<b>Notes:</b>				



Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>3. Operate the Computerised Appointments System (Signposting)</b>				
• Make routine appointments with the most appropriate Clinician.				
• Be aware of the various services the Practice provides and have the ability to make the appropriate appointments.				
• Cancel appointments with the doctors, nurses and HCAs.				
• Check patients in upon arrival.				
• Make urgent / emergency appointments ensuring you are familiar with the practice's use of "red flags".				
<b>Notes:</b>				



Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>4. Prescriptions (Signposting)</b>				
<ul style="list-style-type: none"> <li>Advise patients on how to complete a request for:               <ul style="list-style-type: none"> <li>Repeat prescription</li> <li>Non repeat items</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>Be able to respond to queries from pharmacists, patients and the hospital re medications that patients are taking.</li> </ul>				
<ul style="list-style-type: none"> <li>Be able to understand electronic prescribing including:               <ul style="list-style-type: none"> <li>Setting patients up</li> <li>Changing pharmacy settings especially for new patients already on the system.</li> </ul> </li> </ul>				
<b>Notes:</b>				



Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>5. Patient Registration (Signposting)</b>				
<ul style="list-style-type: none"> <li>Explain to patients requesting registration the Practice arrangements and formal requirements as per Protocol and Guidance.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure patients are given a Practice leaflet / brochure.</li> </ul>				
<ul style="list-style-type: none"> <li>Ensure the appropriately completed forms are received and ID checked before entering on the Practice system including for overseas or homeless patients.</li> </ul>				
<ul style="list-style-type: none"> <li>Know how to advise patients to register for Patient Access (Patient Online) and set up accounts and passwords.</li> </ul>				
<ul style="list-style-type: none"> <li>Know how to enter a registration on the system.</li> </ul>				
<ul style="list-style-type: none"> <li>Know what to advise the patient next, eg. new registration health check, repeat prescriptions, etc.</li> </ul>				
<ul style="list-style-type: none"> <li>Know how to advise visiting patients including:               <ul style="list-style-type: none"> <li>'urgent and necessary'</li> <li>Overseas</li> <li>Private</li> </ul> </li> </ul>				
<b>Notes:</b>				



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<b>6. Inputting Data (Clinical Correspondence)</b> Know how the practice computer is used on a day to day basis to input, locate and retrieve data including:				
<ul style="list-style-type: none"> <li>Retrieve patient details by either name, DOB, address or NHS Number.</li> </ul>				
<ul style="list-style-type: none"> <li>Be able to change patient registration details.</li> </ul>				
<ul style="list-style-type: none"> <li>Record patient transport requests.</li> </ul>				
<ul style="list-style-type: none"> <li>Be familiar with and understand the relevant elements of the computer clinical system, eg. consultation screen, repeat prescriptions, test results, etc.</li> </ul>				
Notes:				



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<b>7. Internal Information Distribution (Clinical Correspondence)</b> Demonstrate the ability to collect, copy, collate and distribute relevant information to Primary Care Health Professionals within the Practice:				
<ul style="list-style-type: none"> <li>Identify the appropriate method in dealing with information including:               <ul style="list-style-type: none"> <li>Discharge letters delivered by hand</li> <li>Prescription requests</li> <li>General post</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>Collect and direct forms relating to requests for private services to the appropriate person. Know what the charges are for this work, or where to find the charges to inform the patient, the payment methods, where to log the payment and to whom to give it.</li> </ul>				
<ul style="list-style-type: none"> <li>Demonstrate the ability to use the photocopier and printers including changing paper and toners and who to call for errors.</li> </ul>				
Notes:				



Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>8. Handling Mail (Clinical Correspondence)</b>				
<ul style="list-style-type: none"> <li>Open and distribute incoming mail as per Practice protocol:               <ul style="list-style-type: none"> <li>Mail from outside the Practice</li> <li>Internal mail</li> <li>Hand delivered mail</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>Correctly prepare outgoing mail as per Practice protocol and within required deadlines:               <ul style="list-style-type: none"> <li>Routine items</li> <li>Urgent items</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>Demonstrate the ability to use the Practice systems to receive and transmit information electronically including:               <ul style="list-style-type: none"> <li>Fax machine – including urgent faxes, 'safe haven' faxes</li> <li>E-mail (NHSmail)</li> <li>Docman – including workflow</li> </ul> </li> </ul>				
<b>Notes:</b>				



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<b>9. Maintaining Filing Systems</b>				
<ul style="list-style-type: none"> <li>Be able to retrieve and re-file records as required adhering to strict alphabetical order.</li> </ul>				
<ul style="list-style-type: none"> <li>Keep records neat and tidy and in good repair with all necessary information recorded correctly on the outer cover.</li> </ul>				
<ul style="list-style-type: none"> <li>Be aware of the importance of maintaining accurate and confidential medical records for effective patient care and to fulfil legal requirements.</li> </ul>				
<ul style="list-style-type: none"> <li>Be aware of your boundaries and what you can/cannot do, if you are not sure, seek advice.</li> </ul>				
<b>Notes:</b>				



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<b>10. Stock Control</b>				
<ul style="list-style-type: none"> <li>Know the procedure to follow when stationery supplies are low (including prescription pads, printer cartridges, etc) and identify the person who orders the stock for the Practice.</li> </ul>				
<ul style="list-style-type: none"> <li>Know how to check that there is enough paper available for the fax machine, photocopier and printers.</li> </ul>				
<ul style="list-style-type: none"> <li>Know where to store stationery and the procedure for receiving and checking stock delivered.</li> </ul>				
<ul style="list-style-type: none"> <li>Know who is responsible for medical stock control and any part receptionists play in this.</li> </ul>				
<b>Notes:</b>				



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<b>11. Deal with Requests for Home Visits</b>				
<ul style="list-style-type: none"> <li>Accurately record the request for a home visit as per Practice protocol.</li> </ul>				
<ul style="list-style-type: none"> <li>Bring any emergencies to the attention of the doctor as per Practice protocol.</li> </ul>				
<ul style="list-style-type: none"> <li>Be aware of the 'doctor on call' and notify appropriately.</li> </ul>				
<b>Notes:</b>				



Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>12. Recognise emergency situations, problems and difficulties and take appropriate action</b>				
<ul style="list-style-type: none"> <li>Draw the doctor's or nurse's attention to any patient who may need immediate attention.</li> </ul>				
<ul style="list-style-type: none"> <li>Make the doctor or nurse aware of patients with special needs, eg. impairments or disabilities.</li> </ul>				
<ul style="list-style-type: none"> <li>Know what to look out for regarding safeguarding issues and who in the Practice to raise concerns with, including recording information as per Practice protocol.</li> </ul>				
<ul style="list-style-type: none"> <li>Direct patients to the appropriate Health Care Professional to telephone triage and log the patient's request into the computer system, recording information as per Practice protocol.</li> </ul>				
<ul style="list-style-type: none"> <li>Know how to raise the alarm for help should a patient collapse in reception.</li> </ul>				
<ul style="list-style-type: none"> <li>Be aware of what to do and the role to play in evacuating the Practice premises including patient safety and records confidentiality.</li> </ul>				
<ul style="list-style-type: none"> <li>Understand how to deal with difficult situations and potential conflict, either yourself or by referring to a more senior colleague.</li> </ul>				
<b>Notes:</b>				



Area of Competency	Working Towards	Competent	Evidence Collated	Assessor Sign off
<b>13. Organise ambulance and other patient transport</b>				
<ul style="list-style-type: none"> <li>Know the information required and how to enter the request for transport onto ICE.</li> </ul>				
<ul style="list-style-type: none"> <li>Be aware of and know how to deal with requests for transport for other Hospitals outside our Trust.</li> </ul>				
<ul style="list-style-type: none"> <li>Telephone emergency / urgent request through to the appropriate control centre having the relevant information available, eg. 'blue light' or 'within 2 hours', etc.</li> </ul>				
Notes:				



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<b>14. Governance and Training</b>				
<ul style="list-style-type: none"> <li>As well as all the above, ensure awareness of Practice policies and protocols, know the leads for these, but also individual responsibilities. In particular for:               <ul style="list-style-type: none"> <li>Complaints</li> <li>Incidents</li> <li>Health and Safety</li> <li>Safeguarding</li> <li>Information Governance</li> <li>Whistleblowing</li> </ul> </li> </ul>				
<ul style="list-style-type: none"> <li>Ensure completion of all Practice mandatory training. Recommended to included:               <ul style="list-style-type: none"> <li>Induction – consider standards in Care Certificate</li> <li>Basic Life Support</li> <li>Fire and Evacuation procedures</li> <li>Health and Safety including Moving and Handling, and Display Screen Equipment</li> <li>Infection Control</li> <li>Safeguarding – children and adults</li> <li>Information Governance including Records, Consent and Confidentiality</li> <li>Customer Care</li> <li>Equality and Diversity</li> <li>Bullying and Harassment</li> <li>Mental Health Awareness including Dementia</li> <li>Chaperoning</li> </ul> </li> </ul>				
<b>Notes:</b>				



## Some Useful References

-  Hillingdon CCG Extranet – [nhsnwl.oak.com/Account/Login](https://nhsnwl.oak.com/Account/Login)
-  Hillingdon GP Confederation Website – [www.hillingdonprimarycare.co.uk](http://www.hillingdonprimarycare.co.uk)
-  Skills for Health Website – [www.skillsforhealth.org.uk](http://www.skillsforhealth.org.uk)
-  Council Voluntary Sector Website – [www.connecttosupporthillington.org](http://www.connecttosupporthillington.org)
-  Hillingdon Primary Care Workforce team email – [hillccg.training@nhs.net](mailto:hillccg.training@nhs.net)
-  Hillingdon CCG communications email – [hillccg.CCGcommunications@nhs.net](mailto:hillccg.CCGcommunications@nhs.net)

## On Completion

Congratulations! You have successfully completed and been signed off as achieving the Hillingdon Receptionists' Competency Framework's standard level competencies. Your certificate will be presented to you by your Practice Manager and the Hillingdon Primary Care Workforce team will be informed of your achievement.

We wish you every success in the important role you currently play in general practice and any career progression you may wish to undertake. Ask your Practice Manager if you would like to work towards the next competency level and receive the second booklet to assist you with this. Good luck!

If you have any further questions, suggestions or requests regarding education and training please do not hesitate to contact us at [hillccg.training@nhs.net](mailto:hillccg.training@nhs.net)

*Hillingdon Primary Care Workforce team*

## With Thanks To:

Marie Franklin, Hillingdon Practice Manager  
Dr Sabby Kant, Hillingdon Clinical Lead for Education and Training  
Annette Alcock, Hillingdon Primary Care Workforce Lead  
Hillingdon CCG Communications Team

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