

Care Navigation Report March 2020

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#### Introduction

Healthwatch Halton is here to gather and represent the views of adults, young people and children living or using health and care services in Halton. One of the ways that we collect feedback is to carry out projects that look at a particular type of service and how it is provided.

On this occasion we are looking at people's experiences of Care Navigation when they have been booking appointments with their GP practice, to understand how it has been delivered and what the impact has been on patients and service delivery.

### What is Care Navigation?

Over the past few years there has been a steady rise in patient complaints about GP services as well as a fall in the numbers able to get an appointment.

The General Practice Forward View (2016)<sup>1</sup> states that significant funding is required to support administration and reception staff to take a more active role in their surgeries to lighten the load on GPs

This has resulted in an initiative called Care Navigation, which is one of the top 10 high impact actions in the General Practice Forward View. Whereby GP reception and administration staff use active signposting to direct patients to other sources of help if they have a minor condition. To do this, they have a list of conditions deemed suitable for signposting and a directory of services.

Care Navigation, when used elsewhere in the country, has been seen to save a significant amount of GP time that can be used to improve access and treat more vulnerable patients. Care Navigation encourages patients to self-refer to local community services where they do not need to see a GP first.

Care Navigation in Halton has been based upon the West Wakefield Care Navigation Model<sup>2</sup>.

NHS Halton CCG have stated the aim of Care Navigation 'is to reduce the amount of time it takes for you to get the right help for your condition. This will be achieved by providing you with more information about the health and wellbeing services that are local to you. You will be able to make informed decisions about the choices which best meets your health and wellbeing needs and access them directly. In order to achieve this, you will be requested to provide more detailed information regarding your symptoms/needs when contacting the surgery.'<sup>3</sup>

Care Navigators are reception and administration staff put through specialist training, who possess additional skills and provide a crucial practice role in improving access to primary care. All with the aim of helping patients to get to the right service faster. It allows front line staff to provide patients with more information about local health and wellbeing services, both within and outside of primary care, in a safe, effective way.

Care Navigation takes place when a patient initially contacts the GP Surgery to arrange an appointment. Trained reception staff have been given the information to advise and direct patients to an alternative service, providing their needs fit within the agreed exclusion and inclusion criteria for each participating service.

<sup>&</sup>lt;sup>1</sup> General Practice Forward View - https://www.england.nhs.uk/gp/gpfv/

<sup>&</sup>lt;sup>2</sup> https://conexus-healthcare.org/care-navigation-active-signposting-wakefield/

<sup>&</sup>lt;sup>3</sup> http://www.haltonccg.nhs.uk/your-health/Pages/Care-Navigation.aspx

#### **Alternative Services**

The 'alternative services' made available in Halton in the first phase of Care Navigation are as follows:

#### **Community Pharmacy**

Emergency contraception between 72 –120 hours of unprotected sexual intercourse (UPSI) or suspected failure of a contraceptive method (e.g. barrier method or missed pills).

Needle and syringe exchange for all adult injectors including steroid users.

One to one support and advice for clients who wish to stop smoking and facilitating access to appropriate smoking cessation products

#### Health Improvement Team

The Halton Health Improvement Team is part of Halton Borough Council and offers a wide range of local, tailored services and initiatives designed to improve the health and wellbeing of local people in Widnes and Runcorn.

#### Minor Eye Conditions

Provides assessment and treatment for people with recently occurring minor eye conditions

#### Musculoskeletal Clinical Assessment and Triage Service

MSKCATS is a musculoskeletal triage service, staffed by Advanced MSK Physiotherapy Practitioners (AMPP), who are specialist physiotherapists. The role of the AMPP is to assess patients with soft tissue, muscle and joint pain and to decide on the most appropriate management pathway.

#### Sexual Health

The Integrated Sexual Health Service offers free, confidential advice on a range of sexual health issues.

#### **Wellbeing Access**

A Community Wellbeing Practice is one that offers patients time with a Community Wellbeing Officer. The role of a Community Wellbeing Officer is to give the patient the chance to talk, connect and take action. The service can help with community navigation, social prescribing, social action, social isolation, mental health and bereavement.

# **Patient Experience of GP Services**

In Halton, the 2019 national GP Patient Survey<sup>4</sup> showed a fall in the percentage of people who can get an appointment when they want, 51% against 53% in 2018. This compares to a national average of 62%.

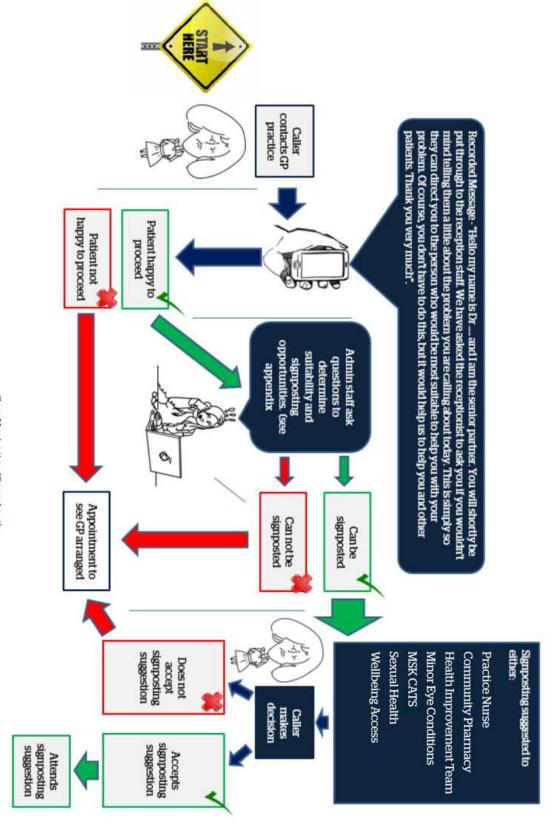
There was a wide variance across practices in Halton ranging from 27% up to 67%.

There has been a similar drop from 64% to 61% locally of people who described their experience of making an appointment as 'Good' against a national average of 67%.

Across the individual Halton practices this ranged from 34% to 88%.

<sup>4</sup> https://www.gp-patient.co.uk/downloads/slidepacks/2019/01F%20-%20NHS%20HALTON%20CCG.pptx





Care Navigation (flow chart)

#### What we did

Following discussions with NHS Halton CCG and the two GP Federations covering Halton (later the Primary Care Networks) it was agreed that it would be a good time to review the progress of Care Navigation after its first year of operation.

It is also expected that another piece of work will be carried out by NHS Halton CCG and the Primary Care Networks to evaluate the introduction of Care Navigation through a staff survey and quantitative and qualitative analyses.

There would therefore be four subsections of the review:

Patient survey by Healthwatch Halton

Staff survey by Primary Care Networks

Quantitative analysis (uptake, services access, Practice variation) by Halton CCG

Qualitative analysis (audits to identify impact and pathways) by Halton CCG

A series of meetings were held with NHS Halton CCG and the Primary Care Networks to discuss the plans for the project and development of the survey, which included the gaining of support from GP Practice Managers to carry out patient surveys in their practices.

Members of our Project Team then contacted the Practices which had offered to help and agreed a date and time to visit and carry out the surveys.

## **Gathering responses**

Staff and members of the project team visited five GP practices to carry out face to face surveys with patients.

- Grove Practice, Runcorn
- Brookvale, Runcorn
- Castlefields, Runcorn

- Bevan Practice, Widnes
- Weavervale, Runcorn

In addition, the survey was made available online and promoted widely through social media.

Hard copies of the survey were also available for members of the public during Healthwatch Halton's community outreach sessions.

The online survey went live in November 2019 and ran for four weeks, during which time our staff and volunteers visited each of the GP practices and spoke with patients attending on the day.

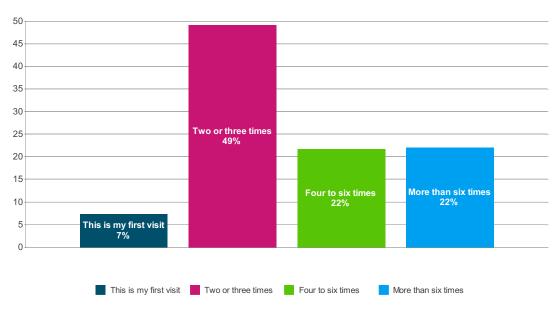
- We received 245 responses to the survey
- Responses were received from patients registered at 13 of the 14 practices in Halton. No patients registered at Hough Green Health Park took part in the survey
- The largest group of respondents were those aged 64 to 75 years (22.4%) followed by those aged 55 to 64 years (21.6%). The smallest group was those aged 17 or under at 3% of the respondents.
- 59% of the respondents said that they considered themselves to have a disability or a long-term health condition.
- 27.5% of the respondents identified as male and 72.5% identified as female. There were no respondents who identified as any other gender.
- 99% of the respondents said that their first language was English.
- When asked about their ethnic identity 96.2% of the respondents identified as White British. Less than 1% each identified as White Irish; White other; Mixed White and Black African; Chinese or another ethnic background.

## **Key Findings**

- A large majority of respondents said they were generally comfortable discussing details with the Care Navigator, although a significant number said they disagreed with the practice in principle
- 78% were asked questions about their illness when they contacted the GP Practice for an appointment.
- 9% had difficulty answering questions when asked by the Care Navigator.
- 76% stated they were comfortable answering questions from the Care Navigator. 15% felt uncomfortable and the remaining 9% were neutral.
- 15% said they didn't feel supported to get the right help.
- 13% reported they were not satisfied with their experience, with most comments suggest this being related to difficulties contacting the practice rather than Care Navigation
- Overall satisfaction with the process seems heavily affected by issues outside Care Navigation with many people mentioning difficulties contacting the practice with reports of waits of 30 minutes to get through

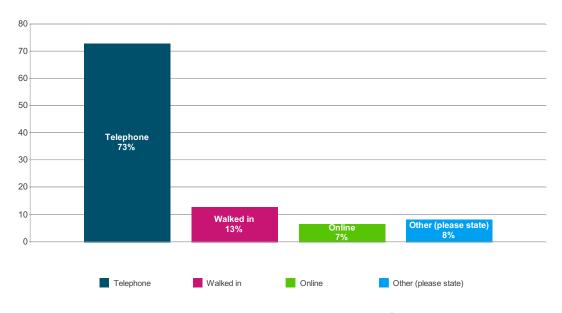
#### What we found





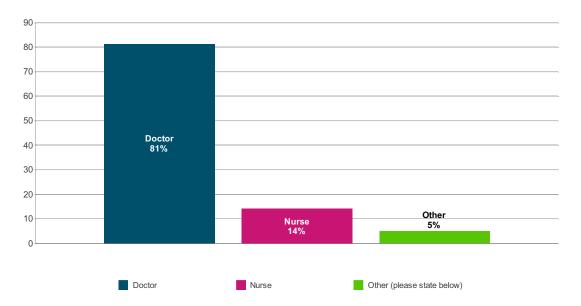
When asked how often they had been to their GP practice in the last 12 months the largest number of respondents said that they had visited two or three times. 22% said that they had been to their GP four to six times and 22% said that they had been more than six times in the last 12 months.

#### Q3 How did you book your appointment?



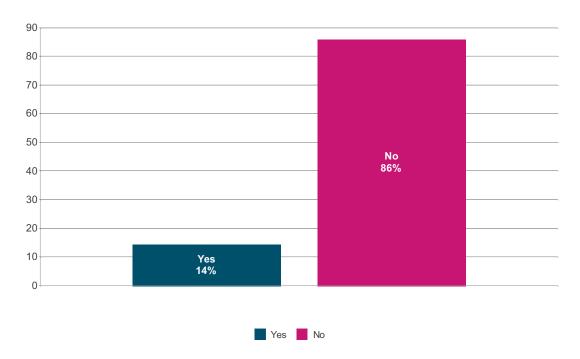
We asked people how they had made their appointment. 73% of the respondents replied they had made their appointment by telephone. 13% said that they had made their appointment as a walk into the surgery and 7% had made their appointment online. The remaining people said that they had used another method of booking an appointment.

#### Q6 Who did you want to see?



81% of the respondents said that they had wanted to see a doctor when they booked their appointment. 14% said that they had wanted to see a practice nurse and 5% said that they had wanted to see another type of practitioner. Those that said that they had wanted to see another practitioner were asked to tell us who they wanted to see. Examples of the answers that they gave are wanting to see a 'phlebotomist' or just wanting an appointment with 'anyone who could help me.'

#### Q7 Were you offered an alternative service?

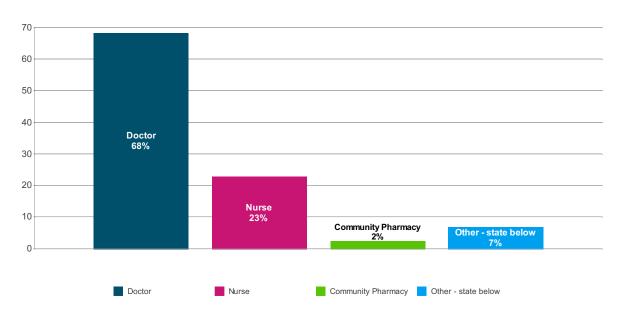


14% of the respondents said that they had been offered an alternative service to the one that they thought they needed.

The respondents who said that they had been offered an alternative service were asked what service they had been offered. 47% said that they had been offered Community Wellbeing Practices, 35% said that they

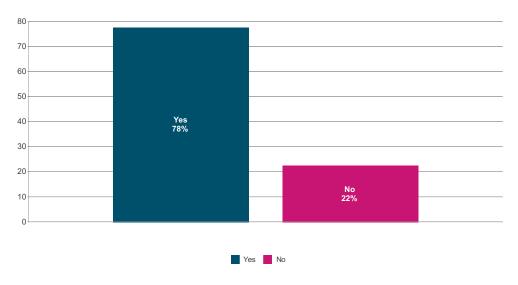
had been offered the community pharmacy service; 12% the Health Improvement Team and 6% the Musculoskeletal service.

#### Q8 Who did you end up seeing?



Respondents were asked who they ended up seeing when they asked for an appointment. 68% of respondents said that they had seen a doctor. 23% said that they had seen a practice nurse and 2% said that they had seen the community pharmacist. The remaining respondents said that they had seen another type of service or practitioner.

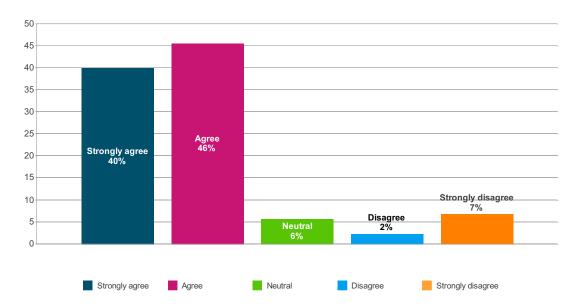
# Q4 When you booked your appointment, were you asked the reason for needing the appointment?



78% of the respondents said that they had been asked for the reason that they wanted an appointment.

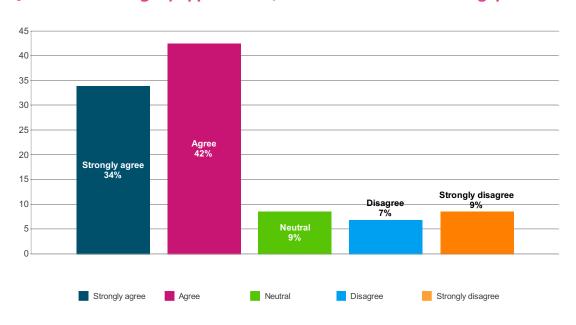
Following this question we asked respondents to answer as series of questions that focussed on their conversation with the Care Navigator.

#### Q5a Whilst booking my appointment I was able to easily answer questions asked



86% of respondents were confident that they were 'able to easily answer questions asked'. 9% of people either disagreed or strongly disagreed.

#### Q5b Whilst booking my appointment, I was comfortable answering questions asked



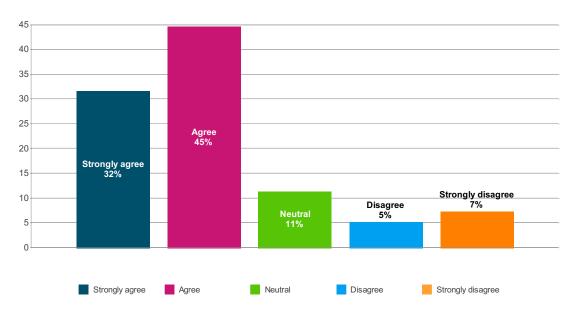
76% of respondents 'agreed' or 'strongly agreed' that they were 'comfortable answering questions asked'.

- 'The receptionist was extremely helpful'
- 'I always find the Care Navigators in Murdishaw very efficient and helpful'
- 'I was asked for the reason, I explained my symptoms and was allocated an appointment.'

16% 'disagreed' or 'strongly disagreed' that they were comfortable answering the questions. Comments were generally around being unhappy at giving personal information to 'non-medical' reception staff,

- 'I am not comfortable telling personal confidential details to the receptionists'
- 'Receptionists seem to feel that they now have medical degrees and are able to diagnose illnesses. Trying to get to speak to someone with true medical knowledge is now virtually impossible.'

# Q5c Whilst booking my appointment, I was confident that what I explained was properly understood.



77% of respondents were 'confident that what they explained was properly understood'

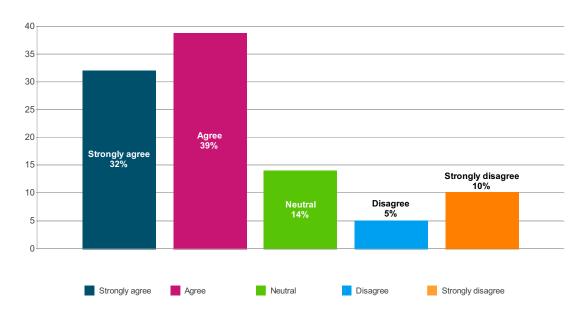
One position commented, 'It was quick and easy', while another told us, 'I felt understood and was given a GP appointment straight away.'

12% of people weren't confident that what they explained was properly understood.

One patient told us, 'I tried yesterday to get an appointment for baby, I was told there were no appointments and not offered an alternative. I range again today and was asked the same questions and given an appointment. It looks to me like it is whoever is interpreting your answers decides to give you an appointment. I gave the same answers the day before and the baby was poorly then.'

Another person stated, 'They just do not listen.'

#### Q5c Whilst booking my appointment, I felt supported to get the right help.



The majority of respondents, 71%, said they felt supported to get the right help.

One person said, 'Staff took my details and said someone would ring me back, which they did within the hour.'

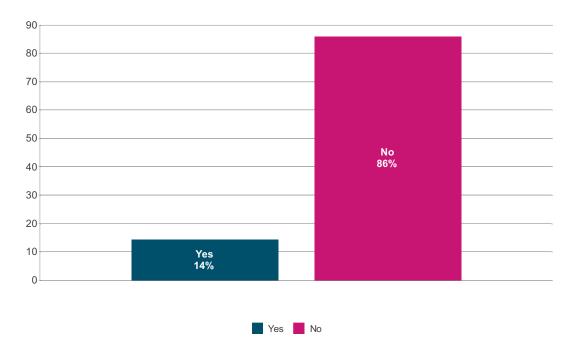
Another said, 'I always find the care advisors in Murdishaw very efficient and helpful'

15% disagreed or strongly disagreed that they felt supported to get the right help while another 14% were neutral about the support they had received.

One patient told us, 'They just do not listen', while another said, 'I was not allowed to pre book an appointment. It was just for a routine ear appointment. I was told to call on the day but I didn't want to take someone's appointment.'

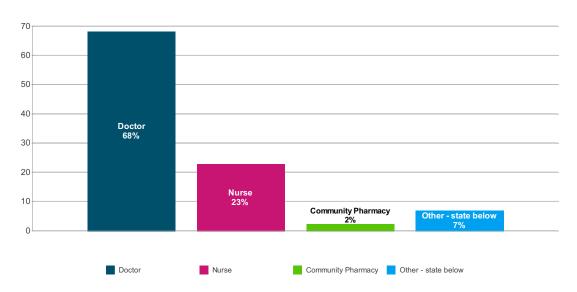
Many of the negative comments from people for this section focussed on their opinions that reception staff weren't qualified enough to ask medical questions.

#### Q7. Were you offered an alternative service?



Following Care Navigation the majority of people weren't offered an alternative service, with just 14% being offered an alternative.

#### Q8. Who did you end up seeing?



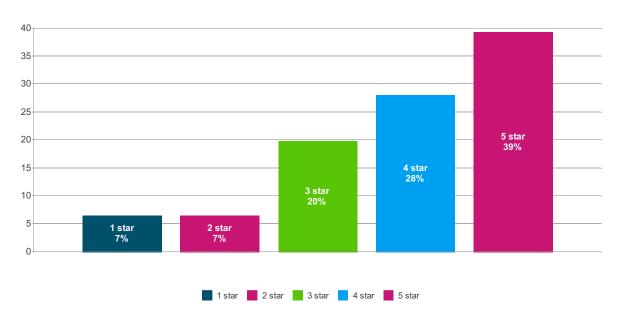
We then asked people to tell us who they ended up getting an appointment to see. Fig 8 shows that 68% of people saw a doctor and 23% a practice nurse.

Other responses included, GP Extra, Urgent Care Centre, phlebotomist and a private audiologist.

We can note from these figures that 81% of people had tried to book a GP appointment and after going through the Care Navigation process this dropped to 68% of people who actually saw a GP. The percentage of people seeing a nurse rose from 14% to 25%, with 2% seeing a community pharmacist.

#### **Patient Satisfaction**

#### Q9 How satisfied were you with your experience of this process?



We asked people to rate from 1 star to 5 stars their experience of Care Navigation, with 1 star being very unsatisfied, through to 5 stars being very satisfied.

14% gave a low satisfaction rating of 1 or 2 stars. The main themes raised were:

- Phone lines
  - Difficulties in initially getting through
  - Length of waiting times on the phone
- Lack of appointments
- Intrusive questioning from reception staff

While the comments around difficulties in ringing the practice, and waiting times once through, don't directly relate to the experience of the Care Navigation process they are still very valid.

If Care Navigation is to be really successful in the long term it needs to be a smooth and stress-free process from the moment the patient picks up the phone to contact their practice.

67% were either 'satisfied' or 'very satisfied' with their Care Navigation experience. These comments highlighted the helpful and friendly staff more than any other aspect of the Care Navigation process.

#### Patient comments and feedback

Respondents were asked for comments about Care Navigation process at various points throughout the survey. Although the requests for comments were attached to different questions within the survey the themes from the comments were similar regardless of where they were shared within the survey.

Common themes from the feedback included a reluctance to share details of the reason for the appointment as reception staff are not medically trained. One of the respondents commented that 'a receptionist is not qualified to ask medical questions regardless of their reason for asking... They are also not qualified to navigate your medical complaint.'

Others objected because they found it embarrassing or intrusive to tell the reception staff. For example, one respondent said that they were 'not comfortable having to explain my medical issues on the phone to reception staff.'

Some of the respondents told us that they had been given an appointment with a GP and then had been asked for the reason for the appointment. For example, one person commented, 'I was asked what the problem was after I was given a Doctors appointment.'

However, this was not the case for all of the respondents with one commenting that they 'had to tell the receptionist the reason for the appointment.'

There was some feedback about the use of telephone triage in some practices. The feedback was mixed with most of it being positive.

For example, one participant said, 'I highly recommend this way of working as each time I have used it I either get to speak with a doctor or nurse practitioner and if required I have been given an appointment the same day.' However, another respondent felt that it was not an effective system saying that they had '27 minutes on the phone, then having to attend in person' and they saw this as 'poor provision.'

Telephone consultations were also mentioned by some of the respondents. These were generally seen in positive terms.

For example, one respondent said 'I've not visited; I've had two telephone consultation. I'm very grateful that the doctors do this.' However, another respondent said that they had had a 'telephone appointment only... hard to see an actual doctor.'

Respondents also gave feedback about waiting times for appointments with comments such as 'the wait for an appointment is significant and could be improved'. However, it was recognised by one respondent that 'staff do their best, if it's full, it's full.'

The telephone booking systems were commented on by some of the respondents. Waiting times to get through on the telephone were commented upon by some, for example, one respondent said that they had been 'waiting half an hour to be answered on the phone' whilst another said that they had been 'on hold for 10 minutes. The music kept stopping to tell me that I was second in the queue; then first; then on hold for 5 minutes before they picked it up.'

Some others commented that when they did get through there were no appointments left. One person told us 'sometimes when you ring you have to wait in a queue and by the time the phone is answered there are no appointments left.'

We also received feedback about the online booking systems. One person said that they used online booking, and as a result they 'avoided any discussion on care navigation'.

There were some comments made about there being a lack of available appointments when booking online, for example, one respondent commented that it was an 'easy process online but just not enough appointments available and all are weeks ahead.'

There were also some comments about a lack of flexibility around the availability of appointments for a variety of reasons. For one respondent it was felt that there needed to be more flexibility in providing appointments for school children with after school appointments being available with them saying 'schools are very unforgiving when children are removed early.' Another said that they needed appointments to be available earlier in the day as due to their reliance on public transport and working 'there is usually one day a week that I can attend as they only have early morning appointments one day a week. Late afternoons are no good to me because I cannot rely on the bus from work to run on time.'

#### **Conclusions**

From the feedback and responses to our survey it would appear that patients understand the general principle and operation of Care Navigation.

We found that people are largely comfortable discussing details of their condition with the GP receptionist, even though a significant number expressed disagreement with the practice in principle (see Patient Feedback and comments, on pg 18).

Despite a recorded message (see NHS England example below) explaining the reason for the questions, there is still some embarrassment/annoyance by patients being asked questions by non-clinical staff about the reason for their call.

Recorded Message: "Hello my Name is Dr......and I am a Senior Partner. You will shortly be put through to the Receptionist Staff. We have asked the receptionist to ask if you wouldn't mind telling them a little about the problem you are calling about today. This is simply so they can direct you to the person who would be most suitable to help you with your problem. Of course, you don't have to do this, but it would help us to help you and other patients. Thank you very much."

The right of refusal is an important part of the message and has been highlighted by several Patient Participation Groups. This ensures that the patient can talk to a GP if they need to.

Overall satisfaction with the appointment making process appears to be affected by things outside of Care Navigation. Many patients mentioned difficulties reaching their GP Practice with long queues on the telephone.

Responses show that 14% of the respondents were offered an alternative service, generally the practice nurse, to the one they had originally wanted to see. What isn't clear from our results is whether patients chose seeing the nurse over an appointment with their GP, or because there were no available appointments with the GP. Either way it does appear to show a potential saving in GP's time.

During the survey it was also noted that some GP Practices have adapted the Care Navigation procedures to fit in with their own operations.

One Practice Manager told us, "We don't Care Navigate using the template, as we found this too cumbersome when dealing with patient telephone calls. All staff are trained to care navigate patients to appropriate services where possible."

Two of the GP Practices we spoke with have GPs calling patients back to carry out a triage, although some Care Navigation may still be carried out during initial call.

These 'tweaks' to the Care Navigation process may help individual practices successfully adapt it meet to their needs and those of their patients.

It seems to still be 'early days' in Halton for Care Navigation with only a handful of alternative services that patients can be signposted to. If Care Navigation is to offer significant benefits to patients and GP Practices the number of alternative services needs to be increased.

We also feel that alternative ways other options to improve the Care Navigation process and reduce the load on GP's time should be considered, such as online consultations to which could be another way to reduce the load on GP's time.

#### Recommendations

- 1. Our report provides a snapshot of patient opinion on the Care Navigation process. This 'snapshot' should now form part of the wider review, to be carried out later in the year.
- 2. Even at 14% redirection, the scheme appears to be achieving the objectives of relieving some of the pressure on GP Services by filtering out patients who could be treated elsewhere with alternative services. We recommend that further work should be undertaken to improve the system and a review of how the practices have amended the original templates should be carried out and best practice included further development of Care Navigation.
- 3. Further engagement and communication work should be carried out across Halton to expand the understanding of patients on how Care Navigation helps in reducing the pressure on GP Services and helps in directing them to the best service for their need.

#### **Limitations**

- a. The sample size was relatively small.
- b. This is not a full evaluation of care navigation as the scope of this report was restricted to understanding the patient experience of the process.
- c. Our report does not account for the outcome of the patient journey, for example if treatment was successful.

## **Appendix 1**

# **Care Navigation Survey**



This survey is to find out about what happened when you contacted your GP Surgery for an appointment. Your surgery takes part in something called 'Care Navigation'. This means that if you phoned the surgery for an appointment, practice staff may ask you questions to understand if another service or professional could be better suited to help.

We want to understand what people think about this process.

We do not need any of your contact details. The results of this survey will be shared anonymously in a report published by Healthwatch Halton.

QT	what is you GP Practice name	
	Appleton Village Surgery  Bevan Group Practice (Beaconsfield / West Bank)  Brookvale Practice  Castlefields Health Centre  Grove House Practice (incl Heath Road)  Hough Green Health Park  Murdishaw Health Centre  Other (Please state)	Newtown Health Care Centre  Oaks Place Surgery  Peelhouse Medical Plaza  The Beeches Medical Centre  Tower House Practice  Upton Rocks Surgery  Weaver Vale Practice  Other (Please state)
Q2	What date did you contact the practice (app	orox)? (DD/MM/YY)
Q3	How did you book your appointment?  Telephone Walked in Online Other (please state)	Q4 When you booked your appointment, were you asked the reason why you contacted the practice?  Yes  Comments
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Q5	Please rate these st	tatements				
		Strongly disagree	Disagree	Neutral	Agree	Strongly agree
	"Whilst booking my appointment, I was able to easily answer questions asked."					
	"Whilst booking my appointment, I was comfortable answering questions asked."					
	"Whilst booking my appointment, I was confident that what I explained was properly understood."					
	"Whilst making the appointment, I felt supported to get the right help."					
	Comments					
Q6	Who did you want t	o see?	Nurse		Other (p	olease state below)
Q7	Were you offered a	n alternative se	rvice?	No		
Q7b	If you answered 'yes	s' to Q7 which se	ervice were you	offered?		
	Community Phar	macy		Minor Eye C	linic	
	Community Well	being Practices		Musculoskel		
	Health Improver	ment Team		Sexual Heal	th Services	

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Q8	Who did you end up	seeing?			
	Doctor		Mino	or Eye Clinic	
	Nurse		Muse	culoskeletal (MSK)	
	Community Phari	macy	Sexu	ual Health Services	
	Community Well		Oth	er - state below	
	Health Improvem				
		officialization in destruction in a			
Q9	(Please rate from 1	star = Very unsatisfi	ience of this processied though to 5 star	Very satisfied)	
	1 star	2 star	3 star	4 star	5 star
	Comments				
Q10		With the Control of t	gery in the last 12 m		
	This is my first v			or three times	
	Four to six times		More	e than six times	
Q11	Are there any additi	onal comments you	would like to share	about booking your	appointment?

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	Do you have a long-standing ill	ness or, disability (Long Term Condition)?
	Yes	
	No	
13	Your age	
	17 or younger	55 to 64
	18 to 24	65 to 74
	25 to 34	75 or older
	35 to 44	Prefer not to answer
	45 to 54	
14	Gender	
	Male	Gender variant / non-conforming
	Female	Prefer not to answer
	Transgender	Other (please state)
15	What is your first language?  English	
	Other (please state)	
16	What is your ethnicity?	Mined and other Mined
16	What is your ethnicity?  White - British	Mixed - any other Mixed Asian or Asian British - Pakistani
16	What is your ethnicity?	background Pakistani Black or Black British - Asian or Asian British -
6	What is your ethnicity?  White - British  White - Irish  White - any other white background	background  Black or Black British - Caribbean  Pakistani  Asian or Asian British - Bangladeshi
16	What is your ethnicity?  White - British  White - Irish  White - any other white background  Mixed - White and Black	background  Black or Black British - Caribbean  Black or Black British - Asian or Asian British - Bangladeshi  Asian or Asian British - Any other Asian background
16	What is your ethnicity?  White - British  White - Irish  White - any other white background	background  Black or Black British - Caribbean  Black or Black British - African  Black or Black British - African  Black or Black British - Any other Black  Any other Black
16	What is your ethnicity?  White - British  White - Irish  White - any other white background  Mixed - White and Black Caribbean  Mixed - White and Black African	background  Black or Black British - Caribbean  Black or Black British - African  Black or Black British - African  Black or Black British - Any other Black background  Pakistani  Asian or Asian British - Asian or Asian British - Other Asian background  Chinese  Other (please state)
16	What is your ethnicity?  White - British  White - Irish  White - any other white background  Mixed - White and Black Caribbean  Mixed - White and Black	background  Black or Black British - Caribbean  Black or Black British - African  Black or Black British - African  Black or Black British - Any other Black  Any other Black  Pakistani  Asian or Asian British - Asian or Asian British - Any other Asian background  Chinese

Thank you for taking part in this survey.

Please return the completed form to:
Healthwatch Halton, FREEPOST PLUS RUAE-CHUG-BRCS,
Suite 5 Foundry House, Widnes Business Park, Waterside Lane, WIDNES, WA8 8GT

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## **Acknowledgements**

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- Diane Henshaw Bevan Practice, Beaconsfield
- Julie Shaw Castlefields Health Centre
- Sharon Williams and Lianne Wilson Grove House Practice
- Carole Mycroft Weavervale Practice

# Call us: 0300 777 6543

# We're Healthwatch

Tell us what you think of local services.

# We're here to help make it better

- Care homes
- Community services
- GP Surgeries
- Mental Health services
- Pharmacies

- Carers at home
- Dentists
- Hospitals
- Opticians





www.healthwatchhalton.co.uk

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