Good Morning Project
telephone care and alert service

OPERATING PROCEDURES

OFFICE PROCEDURES

OPENING THE OFFICE

1. Check the answer machine for messages

   – press 'play'

   -- fill in a message pad

   -- to delete all messages press 'delete' when it tells you to

   -- action any request e.g. send out client application form

   -- ask a supervisor if you need advice

2. Turn on all computer **screens**
   (the PCs will not be off as operators only **log out** at the end of each day)

3. Log in to all computers

OFFICE PROCEDURES

AT THE END OF THE DAY

1. log off from your pc, do not switch the pc off

2. turn the screen off

3. take mail to sorting office (has all mail been logged in post book?)

4. turn off photocopier
   lights
   fan

THE GOOD MORNING DATABASE

The database consists of **4 screens** :

1. **CALLS** to call clients and enter operator reports

2. **CHECK CALLS** to check other operators reports

3. **LISTS** to print client list to sign that checks have been made

4. **EDIT CLIENT** to add a new client and change any of their details

THE GOOD MORNING DATABASE :

CALLS SCREEN

The first screen on the database shows you a choice of colour of list.

Clients are divided into lists depending on where they stay

White = all clients listed alphabetically by surname
Yellow
Magenta
Blue
Cyan
Red
Green
Olive
Grey
Black   = Closed File List

Operators are allocated a calling list and a back up list.

When a list is chosen the screen shows client names and time of call.

Clients are automatically listed in chronological order e.g.

John Smith	08:00
James Smith	08:01
Jenny Smith	08:02
Jacky Smith	08:03

THE GOOD MORNING DATABASE : CALLS SCREEN

The CALLS SCREEN consists of :

TOP NOTES

HOUSE ICON

DOCTOR ICON

TELEPHONE ICONS

OPERATORS REPORT BOX

NEXT CALL BOX

NOT FINISHED BUTTON

FINISHED BUTTON

CLIENT HISTORY

THE GOOD MORNING DATABASE : CALLS SCREEN

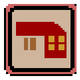
TOP NOTES

The Top Notes tell you about the clients health and any regular activities they do. They build a picture of who you are looking after and tells you where someone might be if they are not in when we call. Information on clients held :

1. Telephone number(s)
2. Day and time of call
3. Date of birth (remember to wish them a happy birthday!)
4. Ailments
5. Any specific instructions to operators e.g. remind client to take their medicine
6. About their weekly routine e.g. when, where a client goes to a club
7. When a Home help visits
8. Any other services / projects that visit their home

THE GOOD MORNING DATABASE : CALLS SCREEN

HOUSE ICON



1. Clients address

2. Who owns the house e.g. owner occupied / local authority / housing association / private landlord

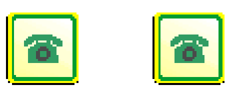
   This information is needed to determine which services are available to a client e.g.

   ~ Home Owners can get free central heating from Age Concern but tenants cannot
   ~ If a client is a tenant and has a pipe burst we know which housing office to call on their behalf

DOCTOR ICON

Name, address, telephone number and location of clients doctor. An operator may need to pass on any concerns we have about clients health to their doctor. The doctor may be contacted to enquire if client has an appointment there.

TELEPHONE ICONS



Name and telephone numbers of two people nominated by the client, who are prepared to visit client when they have not answered our call to make sure they are well. It tells you whether they are key holders to clients house. Contacts are called when the client is not located at any clubs, hospital, doctor etc.

You may call the nominated contacts if you have any concerns about the clients well being.

THE GOOD MORNING DATABASE : CALLS SCREEN

OPERATORS REPORT BOX

Going to visit her sister, Jenny, in Stobhill Hospital today. Access Project is taking her, picking her up at 10am so she'll still be in for our call. Client already has a Lifeline Tube from home help and doesn't need one from us. JG

Report :

NEXT CALL BOX

Enter the time of client's next call.   Use 4 digits and :   e.g.   08:01
11:30

You must use only the symbol : (colon)

If you use another e.g. . , ; then the client record will appear at the bottom of the list and not at the correct time.

CALL CLASSIFICATION BOX

Calls are categorised to allow the monitoring of the project. Please see separate sheet.

THE GOOD MORNING DATABASE : CALLS SCREEN

NOT FINISHED BUTTON

Not
Finished

Choose to keep the clients file **open.**

Their name will remain at the top of the list with the time of call shown.

Use it when you are calling the client back with information or when they have not answered the phone.

Every time you open a client file you must type in information and initial your report.

Every report you make must be initialled.

FINISHED BUTTON

Finished

Choose this button only when you are satisfied that **no further action is required today**.

This will close the clients file.

Their name will drop down to the bottom of the list and their time of call will not be shown.

Every time you open a client file you must type in information (even if it is to say that you have opened it by mistake).

Every report you make must be initialled.

THE GOOD MORNING DATABASE : CALLS SCREEN

MAKING THE CALL

Before you dial the client's number, you should :

1. Read the Top Notes to find out
   - do you need to make a call today?
   - any specific duties e.g. reminding client to take their medication
   - do you need to wish the client a happy birthday?

2. Read the report from the last two days as this will tell you :
   - if they have changed their normal routine (i.e. a change to the top notes) and so you may or may not need to make a call
   - what client has been up to – give you an idea for a topic of conversation
   - how the client has been feeling - have they been active or ill? You will be able to monitor the client's well-being

Over time you will be able to build up a relationship with your client list and will be able to pick up on their moods / feelings. You will build up trust and be able to provide a 'listening ear' when required.

THE GOOD MORNING DATABASE : CALLS SCREEN

WHEN THEIR LINE IS ENGAGED

- enter “engaged, try later. nt “
- click the NOT FINISHED button
  The clients file will remain live and their time of call will be shown
- continue to call the clients on your list
- try again after 10 mins

THE GOOD MORNING DATABASE : CALLS SCREEN

WHEN A LINE IS CONTINUALLY ENGAGED

If after 20 minutes the client's phone is still engaged you must get a LINE CHECK done.

The telephone companies may be able to tell you if :

- there is a fault on the line (advise contact)
- the receiver hasn't been put down properly (advise contact)
- there is a conversation taking place (try again later)

If there is a fault on the line or the receiver is off the hook, you must then let a nominated contact know that you are ***UNABLE*** to make a call to the client to verify their safety.

If the nominated contact has an answering machine then leave a message stating the action you have taken i.e. getting a line check done.

It is then the contact's decision as to whether or not they check up on client.

If there is a conversation taking place then try again later.

Remember proof of conversation is not proof that the client is safe and well.

THE GOOD MORNING DATABASE : CALLS SCREEN

WHEN THERE IS NO ANSWER

- enter ”no answer, try later. nt “
- if they have an answer machine leave a message saying you will call back in 10 mins and ask them to call us on the main number (put what you have done into your report)
- click the NOT FINISHED button
- continue to call clients on your list
- try again in 10 mins

Until the file has been closed by clicking FINISHED it will remain at the top of your list, with their time shown.

This will remind you that client is still to be called.

If a client calls into the project, always offer to call them back to save money on their phone bill.

THE GOOD MORNING DATABASE : CALLS SCREEN

WHEN SPEAKING TO A CLIENT

When you are on the phone to a client, give them your full attention.

Always be polite and don't forget to smile when you speak!

Remember that clients can tell whether or not you are interested in what they have to say.

Never distract a colleague when they are on the phone. If it is important info for the client then write it down for your colleague and let them decide whether or not to bring it into the conversation.

If you happen to call when the client has a visitor, e.g. a home help or health visitor, offer to call back for a chat when its quieter. The dual purpose of the Good Morning service is to alert to health problems but also to help relieve isolation.

THE GOOD MORNING DATABASE : CALLS SCREEN

WHAT INFO DO YOU NEED TO GET FROM THE CLIENT?

You must **THINK FOR** the client :

A client may mention in passing that they have a chiropodists appointment next week. THINK!

- do the Top Notes say they get a call that day?
- if so, will they be in for their morning call?
  - do you need to cancel their call?
  - do you need to change their time?
- where is it?
  - you may need to locate them there
- how are they getting there?
  - could the Access Project take them?
  - do they need Patient Transport Service?
- if the client doesn't get a call that day will it affect them the next day we call?

Remember some clients will not think to let you know when they won't be available, you must think for them.

THE GOOD MORNING DATABASE : CALLS SCREEN

HOW MISTAKES ARE MADE

Closing a client file accidentally.

If the FINISHED button is accidentally pressed you will close the clients file

- their time of call will disappear
- their name will drop to the bottom of the list
- **other operators will then think that client has been called**
- you must re-open the file
    - type "finished by mistake"
    - choose NOT FINISHED button

Remember, until the file has been closed it will remain at the top of your list, reminding you that client is still to be called.

Similarly, if you are to call a client back, e.g. with information they have requested, you can keep the file open by clicking NOT FINISHED.

Then when you have called them and passed the information on you can click FINISHED.

THE GOOD MORNING DATABASE : CALLS SCREEN

WHEN ENDING THE CALL

Wait for a natural break in the conversation and then make sure client knows when we are calling next :

- confirm day of next call
- confirm time of next call
- confirm client will be in for their call

THE GOOD MORNING DATABASE : CALLS SCREEN

WHEN A CLIENTS NEXT CALL IS NOT THE FOLLOWING DAY

Remember that the Top Notes tell you when we call the client.

You must confirm the info in the Top Notes when putting in your report.

You must let tomorrows operator know that the client does not get a call that day, by :

- go to start of your report in operators report box
- use CAPITAL LETTERS to type in when we call next
- name the day, month and year
- if the time is changing, type the new time and the old time (so that it can be changed back again to the original)

For example: If client gets a call on a Monday and Wednesday only, the report should read:

If today were Monday 5th January 04

NO CALLS UNTIL WEDNESDAY 7th JAN 04. Client is going into town today to buy a birthday present for her sister, Jean who lives in London. She'll be visiting Jean soon – will let us know dates. Client is the youngest of 5 girls, grew up in Lambeth but moved to Glasgow when she met her husband. They met when ballroom dancing, she felt sorry for him because he had two left feet! cg

THE GOOD MORNING DATABASE : CALLS SCREEN

WHEN CLIENTS CHANGE THEIR ROUTINE

When a client does something different than what is in their Top Notes

- their usual time of call
- their usual day of call

You must alert the next operator to this by typing in the change of details

- in capital letters
- at the beginning of the report
- put in the reason for the change

Example 1 :
If today were Monday 5th January and clients Top Notes read "Call Monday and Wednesday only" then client would normally be called on Wednesday 7th January.

However, client has made a change to her routine :

NO CALLS UNTIL MONDAY 12TH JAN. Client is going to stay with her sister, Jean, in London for a few days. Having a birthday dinner for Jean. She is travelling back home on Sunday 11th but not looking forward to the plane journey. Told client I hate flying too and told her about the relaxation techniques I use. She can't wait to visit Kew Gardens, always been a keen gardener. jg

Example 2 :
If today were Wednesday 8th February and clients Top Notes read " Call everyday at 8.00am" then the client would normally be called on Thursday 9th February.

However, client has made a change to his routine :

NO CALLS UNTIL FRIDAY 10TH FEBRUARY AS CLIENT HAS EARLY DOCTORS APPT TOMORROW AND WONT BE IN FOR HIS CALL. Sounds chirpy this morning, going into Springburn to his Arthritis Care meeting this afternoon, looking forward to seeing his friends and playing cards. He wants to win back some of the money he lost last week! Routine check at docs. nt

Remember that you change the **time** of the next call by entering it into the NEXT CALL box.

THE GOOD MORNING DATABASE : CALLS SCREEN

WHEN CLIENT CONTINUES TO NOT ANSWER THEIR PHONE

Rule of thumb

- call every 15 mins
- if after 30 minutes* there is still no answer try to locate the client.

*How long you wait until you take action depends on the client's circumstances.

THINK!

Read the Top Notes

- is the client housebound
- do they go to a club on this day
- are there other services that visit today who would be able to tell you if they got access to client's house e.g.

  home help

  meal delivery

  health visitor

  and always get the name of the person you spoke to

Read the history

- do they always answer on time
- have they been unwell recently
- have they ever been out for the papers at this time

  Is there a pattern?

THE GOOD MORNING DATABASE : CALLS SCREEN

IF YOU ARE UNABLE TO LOCATE A CLIENT

When you have failed to locate the client you must check

- client's doctor

    did they have an appointment which client forgot to mention

    did they need to visit the doctor unexpectedly

- Stobhill Hospital and the Royal Infirmary

    has client been admitted since the date of the last call
    (N.B. hospitals should inform doctor surgery of any admissions)

WHEN TO ALERT A CONTACT

You must ONLY alert a nominated contact person after you have made every effort to find the client.

Consider which contact to call first

- Who lives nearest to client
- Who has keys
- Who won't be at work
- Has the client told us who to contact first

Remember that additional information may be available in clients application form, so look it out.

THE GOOD MORNING DATABASE : CALLS SCREEN

WHEN SPEAKING TO A NOMINATED CONTACT

Remember that the nominated contacts will be familiar with our service.

Let them know

- how long your call has gone unanswered
- any relevant information e.g. if the client has been unwell
- ask if the contact knows clients whereabouts
- ask if the contact intends to visit. It is up to them whether they visit or not.

If there is no answer at the contact person

- keep trying in between making your other calls
- leave a message if they have an answer machine, let them know

  how long your call has gone unanswered

  any relevant info

  ask if they can check on client

  ask them to call us back

Remember you cannot close a client's file until you speak **in person** to a nominated contact and they agree to check on the client.

WHAT IF THE CONTACT DOESN'T ANSWER?

If you are unable to reach a nominated contact person, you must alert Strathclyde Police.

- call the local station and report it to the community police section, give them

  name, address and telephone number of client

  how long your call has gone unanswered

  any relevant info

- get the name of the officer you speak to

- ask them to call back and if necessary leave a message on the answering machine

The police will be able to make enquiries with neighbours, local shops etc.

If the police are unable to locate the client or verify their safety they will make the decision as to whether or not they will force entry into clients home.

THE GOOD MORNING DATABASE : CHECK CALLS SCREEN

CHECKING THE CALLS

The checking procedure ensures that no mistakes are made. It ensures

- calls are made on the correct day
- calls are made at the correct time
- the day and time are correct of the next call is correct
- special instructions are in capital letters
- special instructions have been followed

Calls are to be checked within **30 minutes** of the call being made.

The client list will have been printed out the day before.

Write your name at the top of each page of the list which you check.

Using the CHECK CALLS screen, go down the list and check individual clients off one by one.

You will check a list that you have not called and another operator will then check your list.

You must highlight any mistakes to a supervisor, who will inform the relevant operator.

The supervisor may then instruct you to action clients file e.g.
call a client if the operator has missed their call
correct any mistakes made

THE GOOD MORNING DATABASE : CHECK CALLS SCREEN

WHAT TO CHECK

Read the Top Notes and today report.

Consider

- does the client get a call today
  look at the date of the last report, has the call been **made today**
- has the correct **date** been entered for clients next call
- has the correct **time** has been put in for clients next call
- are any instructions for the next operator in capital letters

Mistakes can happen but they must be picked up on at the checking stage.

TAKE YOUR TIME AND CHECK IT PROPERLY

Remember, all operators are part of one team so being able to confirm the well-being of a client is more important than feeling uncomfortable about picking up on a colleagues mistake.

GOOD MORNING DATABASE : EDIT CLIENT SCREEN

In EDIT CLIENT you will

- enter a new client onto the Good Morning database

- update an existing client's details

GOOD MORNING DATABASE : EDIT CLIENT SCREEN

ENTERING A NEW CLIENT

You must speak to the new client and their nominated contacts to confirm the details on the application form before you enter them into the Good Morning database.

Click on the EDITCLIENT desktop icon or choose from the START menu

- go to the bottom of the list of clients to find " Add / Select another Record "

- carefully enter details from client application form into the blank form

    - ensure you have the correct postcode for all addresses

    - use TAB to go to the next box

    - never use ENTER to got to the next box as this will create a new client

- enter the reason for being in EDIT CLIENT

- enter your initials e.g. " enter new client. nt "

Quirks in the system:

Date of birth should be entered BACKWARDS e.g. YEAR, MONTH , DAY

Do not use an apostrophe ' in people's names – use a space instead e.g. Jessie O Donnell

GOOD MORNING DATABASE : EDIT CLIENT SCREEN

CHANGING A CLIENTS DETAILS

You will alter a clients record when they make a permanent or temporary change to their details.

Permanent change to their details can include

- normal time of call
- address
- clubs which they attend
- nominated contact persons details
- medication taken
- ailments etc.

The TOP Notes can also be used to store forthcoming events which will alter the client's normal call pattern.

The info will be used to remind both the client and the operator of change in pattern.

Additional info to go into the TOP NOTES temporarily can include

- forthcoming holiday dates
- forthcoming hospital appointments

Remove from the TOP NOTES after the dates have passed

Example

If today were 1st February 2004

TOP NOTES READ :

> Client is going into Stobhill Hospital from Monday 1st March until Monday 14th March, calls resume Tuesday 15th March 04. Hip replacement.

Putting info in the Top Notes remind the operator to remind the client of their important appointments!

WELCOME HOME LETTERS

Welcome Home Letters are sent out to clients to remind them when their calls are to resume after a break in their calls.

They are sent out when the client stops their calls for **two weeks or more** because they will not be at home e.g.

going away on holiday

staying in hospital

When the client informs you of their break in calls you should either

- agree a date to resume their calls or
- agree that they will let us know when they are back at home

If a client is forgetful you should send a WHL to them even if they are only going away for a few days.

The WHL should be read by the client on their RETURN from holiday, therefore, you must post it to be delivered after they have left. (there is no point sending it out before they have left!)

NB You would not send out a Welcome Home Letter if the client has stopped their calls while they have visitors staying with them, only if they won't be at home for a while.

GOOD MORNING NORTH GLASGOW : SAFETY DEVICES

SAFETY DEVICES WHICH WE CAN OFFER CLIENTS :

Lifeline Tubes

Personal Attack Alarms

Cold Alarms

Memo Minders

Pill Boxes

Safe Cans

GOOD MORNING NORTH GLASGOW : SAFETY DEVICES

LIFELINE TUBES

The tubes hold information on a client that the emergency services can access quickly.

It contains

leaflet for writing name
address
physical description
medical details
emergency contact person name and telephone number

two green cross stickers

Operators must advise the client to

- get their doctor to fill in their medical details e.g.
  medication taken
  any allergies

- store the tube in their fridge (because everyone has one and the emergency services will know where to look)

- put one sticker behind their front door (so the emergency services know client has a tube)

- put the other sticker on the fridge door

- when client changes their medication they must get their doctor to change the details held in the lifeline tube

Remember to ask a new client if they have one before sending it out because they may already have been given one by their home help.

Tell the client what to expect through the post and check that they have received it.

Ensure client knows what to do with the tube, and always send the information leaflet with it

Available to all clients who don't already have one.

PERSONAL ATTACK ALARMS

These are small enough to be carried in a jacket pocket.

When the alarm cord is pulled out from the alarm it screeches to 110db.

They have an integral torch light.

Some (not all) alarms can be screwed onto a wall at the front door and used as a burglar alarm.

Available to all clients who don't already have one.

COLD ALARMS

Cold alarms measure the temperature of the clients house.

It works on a traffic light system :

> if the green light is on the house is warm enough
>
> if the amber light flashes it tells client to heat the house up a little
>
> if the red light begins to flash, it will also beep, alerting client there is the risk of hypothermia

They can be wall mounted or stood on a level surface.

Remember not all clients will need a cold alarm.

MEMO MINDERS

Memo Minders are designed to deter bogus callers.

They remind clients to

not open their door without knowing who is there

to ask for identification before they open their door

Memo Minders are placed near the clients front door.

When the client walks past the Memo Minder she breaks an infra red beam which activates a pre-recorded message to remind client to ask for identification before opening their door.

The night light is also activated to help client see their way to the door.

The message is pre-recorded by one of the community police officers.

Remember not all clients will need a Memo Minder.

GENERAL

TEA BREAKS

Tea breaks are at the discretion of the Manager or in her/his absence, a supervisor.

Staff are allowed 15 minutes and must leave for a break in pairs, always ensuring enough staff are left to man the office.

SMOKING

There is a strict non-smoking policy throughout the building.

If you want a cigarette during your break you must exit the building.

HEALTH & SAFETY

All personal belongings must be put away under your desk or at the coat stand, and must not block the path, or be where there is the danger of someone tripping over them.

Ensure that cupboard doors, filing cabinet drawers etc. are not left open, causing an obstruction to other members of staff.

Crockery must be washed after every use, and the kitchen area must be kept clean at all times. This is the responsibility of every member of staff.

The office must be cleaned **every weekend.**

OFFICE ADMIN PROCEDURES

POST

INCOMING MAIL

All mail except that which is marked as personal, should be opened and left on the IN tray on the manager's desk.

Used stamps are given to charity. Put them in the used stamps envelope.

OUTGOING MAIL

First class franked mail goes into a red postal bag.

Second class mail goes into a green postal bag.

Letters are sent second class UNLESS they are a high priority.

Anything more than a letter must be weighed before being franked.

Enter all post into the stamp book.

The stamp book is a record of the
- date
- name
- address
- reason
- cost of all letters being sent out.

All outgoing mail is taken to ...

MAIL COLLECTION

Mail must be collected everyday from reception.

OFFICE ADMINISTRATION

ADMINISTERING NEW CLIENTS

Every new client is sent a welcome letter explaining :

- what will happen if they do not answer their telephone
- their responsibility to let us know when they won't be in for their call
- how to let us know that they won't be in for their call
- what is expected of their nominated contacts when we alert them
- the role of the emergency services

A welcome letter is also sent to both nominated contacts explaining the above.

There is a master copy of each letter, you only need to change the name and address.

ADMINISTERING CHEQUES

All cheques require 2 signatories, ...

When sending a cheque ensure that you

- do not send the original invoice back to the company, instead
- include their INVOICE or REFERENCE NUMBER on our '**with compliments' slips**. Give the original to Nicky
- send to their payments address as detailed on the invoice
- write it in the post book.

FAX MACHINE

The fax machine should always have paper in it to be able to receive information.

Paper should be used on both sides to cut down on waste.

SHREDDER

Confidentiality must be maintained at all times therefore :

All documents with client names, addresses, telephone numbers etc. must be shredded

All documents with Good Morning info must be shredded

Remember the daily lists must be shredded

Operating procedures:

Keep all loose items e.g. long hair, necklaces away from the cutter

Do not jam the shredder - only shred a few papers at one time

When full, empty the bin into the recycling box

RECYCLE BOX

All paper should be recycled.

You must remove any staples, glued, taped parts from the paper

Not suitable : envelopes, Yellow Pages or carbon paper

Remember you must shred any confidential information i.e. names, addresses, telephone numbers or anything with GMNG logo on it, before recycling it.