

**Professional Support Unit HEE Wessex**

**Quality & Governance Report YR/YR2**

**End of Year Update - 31 March YP1**

**Introduction**

This report is a summary of selected areas of PSW practice which have been agreed as key indicators by the PSW Quality and Governance Group in the past. We present the report for information and for critical appraisal of the PSW performance over the financial year YR/YR2.

The findings need to be seen within the Wessex PSW vision of empowering trainees to become great providers of health care and its mission statement: “We provide doctors and dentists in training in Wessex with focused support for their well-being and development.”

The findings should also assure our PSW principles are met:

* No compromise on patient care
* Transparent and understood by all
* Evidence based
* Clear criteria for assessment and decisions
* Responsible use of funding and development
* Consistent application of guidelines

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The PSW will be at the heart of HEE Wessex vision to identify early interventions to help trainees achieve a higher success rate.

**Section 1 – Referral management**

**New Referrals Financial Year YR-YR2**

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**Table 1 - Total PSW activity YR-YR2:**

|  |  |  |
| --- | --- | --- |
| **New Referrals in Financial Year** | **YS2/YR** | **YR/YP1** |
| ST (incl. Core) |  | TA |
| FT |  | TB |
| GP |  | TC |
| Other |  | TD |
| **Total** |  | **TE** |
|  |  |  |
| Cases Closed within period |  | TF |
| Opened & Closed within financial year |  | TG |

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**Gender of referrals taken from trainee database information (TIS). See Figure 1 below:**

**Fig. 1 - Gender disclosed for all Wessex trainees and PSW referrals (% of baseline trainee numbers)**

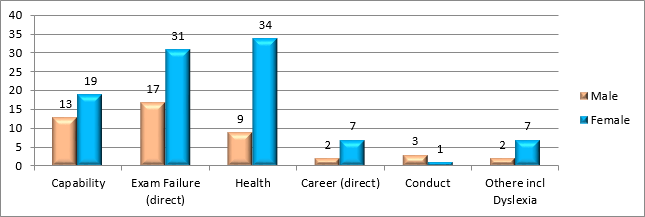
Some trainees do not disclose their gender on TIS hence the top bar “unknown”. In this number is included a small percentage of trainees who would prefer not to disclose their gender. The baseline numbers of trainees fluctuates significantly across the year, this data is from March YP1.

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**Reasons for direct referral to the PSW**

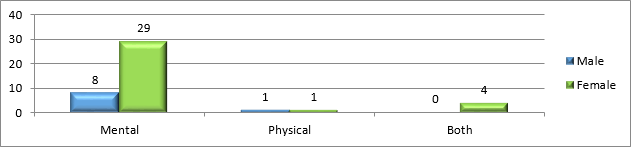
This year’s reasons for referral are shown in figure 2. Table 2 holds data for the last three years. Most referrals have more than one issue. The commonest reasons for referral are RF1, RF2 and RF3.

**Fig. 2 - Referral Reason financial year YR-YR2**



\*some trainees were referred for multiple reasons

**Fig. 2a - Health referrals - (breakdown) YR-YR2**



**Table 2 - Referral Reason and gender split for financial years YS3-YP1**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Ref number** |  |  |  | TCR |
| **Year** |  | **YS3/YS2** | **YS2/YR** | **YR/YR2** |
| Anxiety | M |  |  |  |
| F |  |  |  |
| Capability | M |  |  |  |
| F |  |  |  |
| Career Support | M |  |  |  |
| F |  |  |  |
| Clinical Skills | M |  |  |  |
| F |  |  |  |
| Communication /  Interpersonal facts. | M |  |  |  |
| F |  |  |  |
| Conduct | M |  |  |  |
| F |  |  |  |
| Cultural Factors | M |  |  |  |
| F |  |  |  |
| Exam Support | M |  |  |  |
| F |  |  |  |
| Health Conditions (Mental) | M |  |  |  |
| F |  |  |  |
| Health conditions (Physical) | M |  |  |  |
| F |  |  |  |
| Language support | M |  |  |  |
| F |  |  |  |
| Professionalism | M |  |  |  |
| F |  |  |  |
| ADHD | M |  |  |  |
| F |  |  |  |
| ASD | M |  |  |  |
| F |  |  |  |
| Dyslexia | M |  |  |  |
| F |  |  |  |
| Dyspraxia | M |  |  |  |
| F |  |  |  |
| SRTT | M |  |  |  |
| F |  |  |  |
| Team working | M |  |  |  |
| F |  |  |  |
| Time / Workload management | M |  |  |  |
| F |  |  |  |
| Other | M |  |  |  |
| F |  |  |  |

**Stage of Training and programme for referrals YR-YR2**

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**Fig. 3 – Referrals broken down by Stage of Training YR-YR2**

**Fig. 4 - Referrals broken down by programme grade for new referrals YR-YR2**

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Table 3 shows foundation programme referrals over the last three financial years.

**Table 3 – Foundation Programme referrals to PSW**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| Year | **Referral number (% of FP trainees)** | **Ref no. for the year** | **Percentage of all PSW referrals for the year** | **FP size** | **% of FY1 trainees** | **% of FY2 trainees** |
|  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |
| **YR/YR2** | TB | TC | TD | TE | TF | TG |

**Referrals by Trust and Specialty**

The distribution of referrals from different employing Trusts varies each year.

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**Table 4 – referrals broken down by Trust**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Trust** | **Number of referrals** | **Number in Trust** | **% of Trainees in Trust referred to PSW** | **% of all Wessex trainees** | **% of referrals to PSW** |
| **Bournemouth** | TA | TM | TY | T1K | **T1W** |
| **Dorchester** | TB | TN | TZ | T1L | **T1X** |
| **Dorset** | TC | TO | T1A | T1M | **T1Y** |
| **HHFT** | TD | TP | T1B | T1N | **T1Z** |
| **IOW** | TE | TQ | T1C | T1O | **T2A** |
| **Jersey** | TF | TR | T1D | T1P | **T2B** |
| **Poole** | TG | TS | T1E | T1Q | **T2C** |
| **Portsmouth** | TH | TT | T1F | T1R | **T2D** |
| **Salisbury** | TI | TU | T1G | T1S | **T2E** |
| **Solent** | TJ | TV | T1H | T1T | **T2F** |
| **Southampton** | TK | TW | T1I | T1U | **T2G** |
| **Southern Health** | TL | TX | T1J | T1V | **T2H** |

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Table 5 contains specialty specific data. It’s worth noting that out of the TCR referrals:

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**Table 5 – referrals broken down by Specialty**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Specialty** | **Number of referrals** | **Number in specialty** | **% of trainees in Specialty referred to PSW** | **Specialty as % of Wessex trainees** | **% of referrals to PSW** |
| Anaesthetics | TA | TP | T1E | T1T | **T2I** |
| Dental | TB | TQ | T1F | T1U | **T2J** |
| Emerg Medicine | TC | TR | T1G | T1V | **T2K** |
| Foundation | TD | TS | T1H | T1W | **T2L** |
| GP (trust and GP) | TE | TT | T1I | T1X | **T2M** |
| Medicine | TF | TU | T1J | T1Y | **T2N** |
| Obs & Gynae | TG | TV | T1K | T1Z | **T2O** |
| Occupational Health | TH | TW | T1L | T2A | **T2P** |
| Paediatrics | TI | TX | T1M | T2B | **T2Q** |
| Pathology | TJ | TY | T1N | T2C | **T2R** |
| Pharmacy | TK | TZ | T1O | T2D | **T2S** |
| Psychiatry | TL | T1A | T1P | T2E | **T2T** |
| Public health | TM | T1B | T1Q | T2F | **T2U** |
| Radiology | TN | T1C | T1R | T2G | **T2V** |
| Surgery | TO | T1D | T1S | T2H | **T2W** |

**Open case review**

Case Managers with cases that have been open a long time are encouraged to discuss them in peer supervision sessions. These are also often flagged to the Serious Concerns Group as they tend to be associated with high ongoing costs breaking the notional £1000 ceiling per training for PSW support.

* Figure 5 compares the duration of currently open cases over the last 3 years

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**Fig. 5 - Duration of PSW input for current open cases**

**Fig. 6 - Reasons for referrals open longer than 24months**

**Rolling Analysis of Case Closure (Form F)**

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**Fig. 7 – Rolling Analysis of case closures**

**Specialist Support Group (SSG) referral reasons**

Case managers have access to the specialist support group as per the updated Asperger’s, Dyslexia and Exam support pathways.

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**Exam support and dyslexia**

**Table 6 – breakdown of Exam referrals YR-YR2**

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Gender** | **Grade** | **School** | **Add referrals** | **Country of Medical Training** | **Age** | **Ethnicity** | **Sexual Orientation** | **Religion** | **Disability** |
|  |  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |  |

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**Section 2 - Case Activity and financial management**

**Monthly open case management**

Figure 8 demonstrates the monthly case load for the first half of the year--*FREE TEXT*

**Fig. 8 - PSW open case load overall by month**

Case manager (CM) and Specialist support group (SSG) demand for input varies through the year, this data has helped with our budget setting for the year (see figure 10).

We updated the process to ensure invoices are signed off and crossed-checked before they are paid. This helped the PSW to manage the budget actively and predict overspends and mitigate as needed. Understanding activity trends means we can set our run rate for the year and monitor performance. This has become essential with increasing budget constraints. This financial monitoring forms a significant part of our bimonthly PSW business review meetings. This also helps with planning new case manager induction as demand rises in the third and fourth quarters of the financial year.

**Fig. 9 - Total Hours for PSW CMs and SSG Experts by month**

Figure 10 describes the monthly budget demand for YR-YR2 that of course maps to figure 11. The YP1-YP1 run-rate will be adjusted to match last year’s activity trends.

**Fig. 10 - Monthly invoice trends for PSW CM and SSG Experts**

**Fig. 11 - Monthly breakdown of CM and SSG invoices YR-YR2**

**PSW Annual Budget and Expenditure**

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**Table 7 - Summary of PSW total spending**

|  |  |  |
| --- | --- | --- |
| Budget Year | Budget set | Overspend |
|  |  |  |
| YS3/YS2 |  |  |
| YS2/YR |  |  |
| YR/YP1 |  |  |

**Table 8 – PSW expenditure**

|  |  |  |
| --- | --- | --- |
| SSG trainee cost |  | TA |
| SSG non-trainee cost\*\*\* |  |
| CM trainee cost |  | TB |
| CM non-trainee cost\*\*\* |  |
| \* SRTT Recharged (claimed back) |  |  |
| **Total Cost** |  | **TC** |

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**Table 9 - Protected Characteristics of PSW Trainees appendix**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Specialty** | **Gender** | | **Trained** | | **Age** | | | | **Ethnicity** | | | | | **Religion** | | | | | | | | | **Disability** | | **Sexual Orientation** | | | |
|  | Male | Female | UK | Non-UK | 23-29 | 30-35 | 36-40 | >40 | White B | White O | Asian | African | Other | Christian | Islam | Hindu | Atheist | Sikh | Judaism | Buddhism | Other | Prefer not to say | Yes | No | Heterosexual | Bisexual | Homosexual | Prefer not to say |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**Table 10 - Protected Characteristics of PSW IMG Trainees**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Specialty | Gender | | Age | | | | Ethnicity | | | | | Religion | | | | | | | | | Sexual Orientation | | | | Disability | |
|  | Male | Female | 23-29 | 30-35 | 36-40 | >40 | White B | White O | Asian | African | Other | Christian | Islam | Hindu | Atheist | Sikh | Judaism | Buddhism | Other | Prefer not to say | Heterosexual | Bisexual | Homosexual | Prefer not to say | Yes | No |
|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

**Conclusion:**

The key points highlighted in this report are:

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