



# SOUTH CENTRAL AMBULANCE SERVICE NHS FOUNDATION TRUST

## CLINICAL PASSENGER/OBSERVER POLICY & PROCEDURE

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## INDEX

### Page

1. Policy Statement
2. Equality Impact Assessment
3. Organisational Aims
4. Organisational Objectives
5. Organisational Structures and Accountabilities
6. Criteria for Observers (internal)
7. Criteria for Clinical Placements/Passengers
8. Criteria for Observers (external)
9. Application Process
10. Trust Process
11. Termination of the placement
12. Time Constraints
13. Health & Safety
14. Management

### **Appendix**

- Appendix 1 Confidentiality Clause
- Appendix 2 Ambulance Clinical Passenger / Observer Form
- Appendix 3 Observer / Placement Agreement Form
- Appendix 4 Briefing from Ambulance Crew at commencement of shift
- Appendix 5 Code of Code



## SOUTH CENTRAL AMBULANCE SERVICE NHS FOUNDATION TRUST

### OBSERVER POLICY AND PROCEDURE

#### 1.0 POLICY STATEMENT

- 1.1 This policy has been designed by South Central Ambulance Service NHS Foundation Trust (hereinafter referred to as the Trust) to manage external and internal observer placement requests. The Trust frequently receives requests for observers to accompany ambulance staff to experience their working environment. This has been facilitated and accepted as good practice as a means of increasing awareness of the difficult and demanding role of the modern ambulance service. However, it has now become necessary to review this practice for the following reasons:
- *The increase in requests and escalation of demand for placements*
  - *The risk of observer when conveyed in a Trust vehicle - particularly in emergency situations*
  - *The duty of care placed upon the Trust by allowing such practices*
  - *Ethical and confidential considerations*
- 1.2 This policy will apply to any request for observer placements, including initial training and/or on-going development.
- 1.3 Patient confidentiality, observer safety and Operational staff have been taken into account in writing this policy.
- 1.4 The term observer has been defined taking into account those external and internal to the Trust.
- 1.5 Applicants must submit a counter-signed application form not less than four weeks before the proposed placement date and applications completed and authorised within 2 weeks.
- 1.6 Capacity planning (through the Education Manager – Placements) will have abstracted all relevant planned education placements at the beginning of the academic year (August), therefore, all resultant placement time will be viewed as available to the Scheduling Managers
- 1.7 The relevant Scheduling Manager will take responsibility for managing the process for observer placements ensuring arrangements are in place and interested parties informed.
- 1.8 Area Managers, Team Leaders or Clinical Mentors (in their absence this will be undertaken by the supervising member of staff) will ensure the observer is briefed in line with requirement set out in section 10, point 3 of this policy before the start of the placement.
- 1.9 Each placement period should be no longer than is necessary to achieve the learning outcomes.
- 1.10 Scheduling will ensure Observers will be given details about the placement no later than two week prior to placement date.
- 1.11 Observers will be expected to provide on-line feedback, which can be accessed by both Education and Operations, in order to evaluate and monitor the learning environment. This feedback will then be used to feed into educational and placement audits.



## **2.0 EQUALITY AND DIVERSITY STATEMENT**

- 2.1 The Trust is committed to promoting positive measures that eliminate all forms of unlawful or unfair discrimination on the grounds of age, marital status, disability, race, nationality, gender, religion, sexual orientation, gender reassignment, ethnic or national origin, beliefs, domestic circumstances, social and employment status, political affiliation or trade union membership, HIV status or any other basis not justified by law or relevant to the requirements of the post.
- 2.2 By committing to a policy encouraging equality of opportunity and diversity, the Trust values differences between members of the community and within its existing workforce, and actively seeks to benefit from their differing skills, knowledge, and experiences in order to provide an exemplary healthcare service. The Trust is committed to promoting equality and diversity best practice both within the workforce and in any other area where it has influence.
- 2.3 The Trust will therefore take every possible step to ensure that this procedure is applied fairly to all employees regardless of race, ethnic or national origin, colour or nationality; gender (including marital status); age; disability; sexual orientation; religion or belief; length of service, whether full or part-time or employed under a permanent or a fixed-term contract or any other irrelevant factor.
- 2.4 Where there are barriers to understanding e.g. an employee has difficulty in reading or writing or where English is not their first language additional support will be put in place wherever necessary to ensure that the process to be followed is understood and that the employee is not disadvantaged at any stage in the procedure. Further information on the support available can be sought from the Human Resource Department.

## **3.0 ORGANISATIONAL AIMS & OBJECTIVES**

- 3.1 Subject to Operational demands and resources, the Trust aims to provide the opportunity for observers to satisfy their learning need within South Central Ambulance Service.

## **4.0 ORGANISATIONAL STRUCTURES & ACCOUNTABILITY**

- 4.1 The Chief Operating Officer has direct responsibility for implementing the policy including
- *coordinating and ensuring the implementation and continued development of risk management throughout the Trust;*
  - *identifying & interpreting new legislation and Government guidance in to relation Governance, Health and Safety & Risk;*
  - *advising the Chief Executive, Directors and Board on matters of risk;*
  - *coordinating and obtaining assurances from each of the Executive Directors in relation to risk management and controls;*
  - *receiving and monitoring all risk and adverse incident reports, identifying trends and produce statistical data for the Trust Board in order to provide a satisfactory resolution*



**5.0 CRITERIA FOR CLINICAL PASSENGER / OBSERVERS – TRUST EMPLOYEES (outside their usual working area)**

5.1 This section may apply to staff employed in the following areas; Communications Centre, Patient Transport Service, Student Paramedics, Community Responders, Military & Fire Co-Responders (although this list is non-exhaustive).

5.2 Observers will demonstrate clear development outcomes to their respective line managers. This may be highlighted within Trust Appraisals. The following resources are identified as possible placements:

- *Emergency and Urgent Ambulance*
- *Rapid Response Vehicles*
- *Emergency Care Practice*
- *Patient Transport Ambulance*
- *Emergency Operations Centre (EOC)*
- *Helicopter Emergency Medical Services (HEMS) – Clinical Passengers only*
- *Hazardous Area Response Team (HART)*

as previously outlined, the above list is non-exhaustive.

**PLEASE USE FORMS IN APPENDIX 2 & 3**

**6.0 CRITERIA FOR OBSERVERS - NON TRUST EMPLOYEES**

6.1 Placement requests must be made in writing to the relevant Scheduling department.

6.2 Clinical Passengers/Observers undertaking a defined placement will demonstrate a clear development outcome to their line managers. The following resources are identified as possible placements:

- *Emergency and Urgent Ambulance*
- *Rapid Response Vehicles*
- *Emergency Care Practice*
- *Patient Transport Ambulance*
- *Emergency Operations Centre (EOC)*
- *Helicopter Emergency Medical Services (HEMS) – Clinical Passengers only*
- *Hazardous Area Response Team (HART)*

6.3 Clinical Passengers will be encouraged to work within their level of competence and within their scope of practice whilst working up to the skill level of the supervising member of staff.

6.4 Observers will be supervised by predetermined, and appropriate Trust Employee at all times.

**PLEASE USE FORMS IN APPENDIX 2 & 3**



## 7.0 APPLICATION PROCESS

- 7.1 Complete and sign appendix 2 & 3 and submit to the following for initial authorisation:
- Section 5 - Line Manager or Area Managers
  - Section 6 - Line Manager or Scheduling Manager
- 7.2 The Trust reserves the right to make final authorisation of the placement
- 7.3 The following must be considered before authorisation is given:
- Reasons for the placement
  - Benefits to the Trust
  - Benefits to the observer
  - Part of a recognised Course of Study
  - Number of times applicant has requested placement
  - Time extensions may be allowed in exceptional circumstances
  - Observer placement must normally be completed before 2300 hours
- 7.4 All applications will then be sent to the relevant Scheduling department for placement authorisation for specific dates.
- 7.5 The Scheduling department will send the Observer/Placement Agreement form (appendix 3) to the applicant with the start time and date agreed not less than two weeks before the date of placement (see 1.5)
- 7.6 A signed copy of appendix 3 will be returned to the Scheduling Department who then, in turn, will forward a copy to the Information Governance Team.
- 7.7 Any placement of 4 weeks or more for non-trust employees will require an honorary contract, and therefore will need to be authorised by the University & Placement Coordinator and the Education Manager (Placements) in consultation with the operational area.

## 8.0 TRUST PROCESS

- 8.1 The Scheduling department will produce an up to date record of observers and ensure appropriate forms are fully completed and logged, as appropriate
- 8.2 Monthly activity reports of completed placement activity will be sent to the University & Placement Coordinator by both Scheduling departments
- 8.3 Observer placement appointments will be logged in the Station Log Book with the relevant details.
- 8.4 Every Observer will be briefed prior to their placement either by the Area Manager, Team Leader, Clinical Mentor or appropriate supervising employee as to:
- Required Behaviour
  - Code of Conduct
  - Health & Safety procedures
  - Patient confidentiality and privacy
  - Insurance liability
  - Follow reasonable instruction from the supervising member of staff

**Failure to adhere to the above will result in termination of the placement**



- 8.5 The Clinical Passenger/Observer Application form (Appendix 2) will be faxed to the EOC at least 24 hour before the start of the placement by the local Scheduling department.
- 8.6 The relevant EOC will acknowledge receipt, with a record entry made on the daily control sheet.
- 8.7 Written feedback should be forwarded to the appropriate authorising manager (7.1) and received within four weeks of the placement activity (1.11).
- 8.8 The feedback shall be collated and made available to key stakeholders in line with audit and quality assurance processes.

## **9.0 TERMINATION OF THE PLACEMENT**

- 9.1 The observer's attachment can be terminated for the following reasons:
- a) Breach of Code of Conduct
  - b) Inappropriate behaviour
  - c) Breach of confidentiality
  - d) Breach of Health and Safety
  - e) Failure to follow a reasonable instruction from a supervising member of staff

## **10.0 TIME CONSTRAINTS**

- 10.1 There will be no observations undertaken after 2300hrs unless justified by specific learning or development needs. This decision will be taken by the Scheduling department and relevant Area Manager
- 10.2 Observation extensions beyond 2300hrs should only be due to an unforeseen overrun (see 10.1)

## **11.0 HEALTH AND SAFETY**

- 11.1 By completing appendix 2 & 3 you are agreeing to the Trust Health & Safety conditions.
- 11.2 Clinical Passengers/Observers with South Central Ambulance Service NHS Foundation Trust (SCAS) have a legal and moral responsibility to take all reasonable steps to ensure their own and others' safety. The Trust has definitive policy and procedures that must be followed.
- 11.3 All necessary Personal Protective Equipment will be provided and any other items required protecting the health and safety of the clinical passenger/ observer.
- 11.4 Appropriate appearance/footwear and clothing should be worn which is in line with a professional ambulance service, and it's internal policies. Therefore, all observers should be made aware of SCAS Uniform Policy, complying where reasonable and appropriate
- 11.5 The Trust accepts no liability for injury, loss or damage caused by failure to follow the defined procedures or directions given by Trust personnel.



## **12.0 MANAGEMENT**

- 12.1 The Clinical Passenger/ Observer, regardless of qualifications or experience, shall at all times whilst on placement, follow the directions given by SCAS employees present.
- 12.2 Failure to follow these instructions will lead to immediate termination of the placement and the Clinical Passenger/ Observer will be asked to leave SCAS premises/ vehicles immediately.
- 12.3 Whilst Clinical Passengers are encouraged to undertake practice clinical skills, it will be under the direct supervision of an appropriately qualified employee of the Trust. The Trust will not accept any liability and/or responsibility for any clinical and/or procedures undertaken by the clinical passenger outside of the Trust's defined procedures or policy.
- 12.4 No additional remuneration will be provided by the Trust for completion of a clinical passenger/observer placement.
- 12.5 Photo ID such as University card, passport or driving licence will need to be seen by at the commencement of the shift to confirm their identity.
- 12.6 In the event that the clinical passenger/observer is not identified on the daily control sheet or station log, the Team Leader/Clinical Mentor or appropriate Trust employee should confirm the placement arrangement with the Scheduling department. Failure to obtain the appropriate authorisation will terminate the placement.
- 12.7 Any person requesting placement has a duty to disclose any health issues that may compromise their suitability to attend placement, or the well being of the patients, public and/or staff



## CONFIDENTIALITY AGREEMENT – Appendix 1

### Confidentiality Clause

The Trust policy adheres to the Data Protection Act 1998 and any patient information is strictly confidential and must not be discussed with anyone other than the crew.

1. Students/Observers acknowledge that, by virtue of their position and in carrying out the duties associated with their role they, will have access to Trust secrets and confidential information belonging to or relating to the Trust or its suppliers, purchasers/clients, and patients. Students/Observers therefore undertake that neither during their term of office nor after the termination of such, and without limitation of time they will not: -
  - 1.1 Publish, disclose or otherwise communicate to any person, company, business entity or other organisation whatsoever, any Trust secrets or confidential information belonging to or relating to the Trust, its suppliers, purchasers/clients, and patients.
  - 1.2 Make use of any trade secrets or confidential information belonging to or relating to the Trust or its suppliers, purchasers/clients and patients for their own purposes or benefit, or for the purpose of benefit of any other person, company, business entity or other organisation whatsoever.
2. For this purpose 'confidential information' shall include, but not be limited to, any information relating to purchasers, marketing and sales plans and information, pricing information, annual and strategic plans, information concerning employees or patients, information relating to financial and business dealings, research activities, Policies, Procedures, Operational Capabilities, Service Orders or any document marked 'confidential' or which the employees are advised to be 'confidential' or which they might reasonably expect to be regarded by the Trust as 'confidential'.
3. The Student/Observers' obligations shall apply in relation to any Trust Business or confidential information which: -
  - 3.1 They have been authorised by the Board to disclose, publish, communicate or make use of, or which is necessary to disclose, publish, communicate or make use of for the proper and efficient discharge of their duties.
  - 3.2 They are required by law or any Court or other similar judicial body or authority to disclose, publish or communicate.
  - 3.3 Have come into the public domain other than by way of unauthorised disclosure whether by themselves or by any other person, company, business entity or other organisation whatsoever.
  - 3.4 The Student/Observer shall not make or retain any copy of, nor make any notes, nor remove from the premises of the Trust, any trade secret or confidential information belonging to or relating to the Trust.
  - 3.5 Whilst on placement with HART, observers may, through a HART deployment or observation of a training exercise be privy to HART operational capabilities, tactics, logistics and details of incidents that may be of a sensitive nature at both a local and national level. Discussion of these capabilities, tactics, logistics and incidents outside the remit of the placement is strictly forbidden, particularly incidents attended by the team that may provoke media interest.



**AMBULANCE CLINICAL PASSENGER / OBSERVER APPLICATION FORM**  
**Appendix 2**

Please complete this form electronically and email to your manager/course leader for authorisation. Only emails from your manager or bona fide NHS, Police, Fire and Rescue Recognised Education Provider or Military email addresses will be accepted as proof of authorisation. Once completed please send this form to the relevant Department Manager, Area Manager or Placement coordinator

**To Be Completed by Applicant**

Name: <i>(please use capitals)</i>		Current Place of Work:	
Home phone: Work phone: Mobile phone:		Email address	
Home Address & Post Code:			
Current Job Role:		Please state name and contact phone in case of emergency:	

Car Details: Make, Model, Colour, Registration	
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Placement Area			
Location/Station/Dept			
Requested Date		Length of Placement	



Please write in no more than 200 words an answer to the following question:

*Why do you want to observe a shift with SCAS and how do you feel that you would benefit from it?*

Answer: *(please use a separate sheet of paper if necessary and staple to this form)*

Signed; \_\_\_\_\_ Date: \_\_\_\_\_

To Be Completed By Line Manager / Course Leader

Manager to provide additional information to support this request

Manager Name		Title	
Contact details			

.....

**For SCAS use only**

To be authorised by Department Manager / Area Manager – SEND TO SCHEDULING DEPARTMENT

Authorisation	Yes / No (If no please provide comments below)
Comments	
Name / Signature / Date	

To be completed by Department Manager / Area Manager for all staff section 6, 7 & 8	
Shift date:	
Shift times:	
Placement:	
Crew	
Practice emailed & date:	Scheduling Coordinator Informed <b>YES / NO</b>
Applicant Contacted and forms sent as appropriate:-Code of Conduct & Placement Agreement Form	



**OBSERVER/PLACEMENT AGREEMENT FORM – Appendix 3**

**The Trust accepts no liability for injury, loss or damage caused by failure to follow the defined procedures or directions given by the Trust personnel.**

I, the signatory, accept all the provisions set out in this Agreement and confirm that I understand the risks inherent in the Ambulance Service. I am aware that, by nature, the duties and working environment of the Emergency Services has a potential to be hazardous at times without prior warning. South Central Ambulance Service Foundation Trust cannot accept liability for any injury, loss or damage caused by my failure to comply with Health and Safety, operational or management procedures. I am aware that any breach of confidence could result in termination of my placement and a civil action for damages. I have read and agree to comply with the Confidentiality Agreement (appendix 1) and the Code of Conduct (appendix 5). I consider myself healthy and fit enough to undertake this placement.

**Signed:** .....

**Name (in capitals).** .....

**Date of Birth:** ..... **Age:** .....

*No person under the age of 18 years is permitted to observe on a Trust vehicle/premises*

**Emergency Contact Details**

**Next of Kin (Name):**..... **Relationship:** .....

**Primary contact number (mobile):**.....

**Secondary contact (home and/or work):** .....

**Once completed**

**Paper agreements – FAO Barbara Sansom or Mary Jones at Bicester HQ**

**Electronic copies – to [dpa@scas.nhs.uk](mailto:dpa@scas.nhs.uk) (if possible scan and email the agreements) and relevant scheduling department**

**Copy to be presented on commencement of shift**



## Appendix 4

### **Briefing from the Ambulance Crew (please ask at the commencement of shift/placement)**

Prior to the shift the crew will brief you on the following issues:

1. Introduction to role of the ambulance service
2. Health and Safety including the use of Protective Equipment
3. Approaching an incident safely including dwelling and public place,
4. Dealing with all types of patients
5. Dealing with relatives/bystanders
6. Patient confidentiality



**CODE OF CONDUCT** - Appendix 5

**PURPOSE OF THE CODE**

- Detailing the appropriate conduct for your placement
- Preparation for the placement
- General understanding of your role whilst on placement
- Underlying that the duty of care is to the patient and the Ambulance Service
- Understanding that your actions and behaviour may reflect on the Ambulance Service

**PERSONAL STANDARDS**

**Personal Hygiene and cleanliness**

- Cleanliness and high standards of personal hygiene are of paramount importance in minimising the risk of cross infection
- Low personal standards of cleanliness and hygiene can make patients and other staff feel uncomfortable

**Personal Appearance**

- Operational Uniform / smartly dressed
- Hair should be kept under control and never loose/over the collar
- Excessive jewellery should be avoided

**CONDUCT AND BEHAVIOUR**

**Conduct towards Trust staff**

- Choose appropriate times for questions
- Professional and courteous

**Sense of Responsibility**

- Never divulge information to unauthorised people
- Do not give statements about the Trust to the media
- Comply with all Trust policies, procedures and protocol
- Smoking is prohibited
- Alcohol is prohibited
- Maintain a professional image- your manners and actions reflect on the Trust while on placement