



University College  
of Osteopathy

# Clinic Guidance: Allocation of Patients to Students

Core Documentation Cover Page

# Clinic Guidance: Allocation of Patients to Students

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### Equality Impact

Positive equality impact (i.e. the policy/procedure/guideline significantly reduces inequalities)	
Neutral equality impact (i.e. no significant effect)	X
Negative equality impact (i.e. increasing inequalities)	

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## ALLOCATION OF PATIENTS TO STUDENTS GUIDANCE

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## 1. SCOPE

- 1.1 The allocation of patients in any clinical setting is complex based on a number of different factors. This document hopes to explain the different factors that need to be considered and the role that different groups have in managing this, from the reception team and management staff to each student.

## 2. ALLOCATING PATIENTS - RELEVANT FACTORS AT THE UCO

- 2.1 The following factors need to be considered when a patient books in to make an appointment:
- a) When the patient is available to come in
  - b) Timing of the appointments
  - c) Numbers of students available
  - d) Students allocated to specialist clinics
  - e) Available tutor cover
  - f) Availability of double appointments for new patients and re-exams
  - g) Availability of appointments within a student's list
  - h) Ability of students to manage their lists with tutor support
  - i) Patients making a direct request for a student practitioner

## 3. HOW ARE PATIENTS ALLOCATED TO STUDENTS?

- 3.1 When patients contact the BSO they will be offered an appointment based on what suits the patient best. This will however be dependent on the above factors and if a student has free appointments at the appropriate time.
- 3.2 The computer system does prioritise students who have seen the lowest number of new patients (NP's) and re-examination patients (RE's), so these students will be selected first if they have appropriate time slots available. It should be noted that only those NP's who attended their appointment will be counted.
- 3.3 For example, a NP who would like to come in after lunch but cannot make the 1.40pm start, thus avoiding teams 1 and 3. They are likely to be offered the 2pm start on Teams 2 and 4 but this will only be with students who have the necessary double appointment available. A student who has had relatively few new patients but has a 2.40pm returning patient, is therefore unable to see this NP, who will be allocated to a colleague.
- 3.4 This system is not 100% perfect as with many complex situations such as this and so we encourage students to monitor their lists and if they have any concerns, they should speak to their tutors, Team Leader or the Reception Manager.

## 4. RESPONSIBILITIES OF THE RECEPTION TEAM

- 4.1 The reception teams' role has in part been described above as they are at the front line when booking in patients. This means trying to allocate patients across all teams and all students where possible within the limiting factors described.
- 4.2 Where possible, the reception team also tries to review students lists for a few days ahead so that they can see where there are significant gaps in students' lists and try to book accordingly.
- 4.3 The reception team also have a role to play in trying to keep double appointments free where possible to allow for the booking of a NP. This allows the most efficient use of time in a students' list so that they have the greatest opportunity to see patients.

## 5. RESPONSIBILITIES OF STUDENTS

- 5.1 Students are not involved in the initial booking in of patients but do have a role to play in managing their own lists and considering the fairness of patient distribution on their team.
- 5.2 Firstly students should be aware of the availability of appointments on their lists so that they can manage their lists as efficiently as possible.
- 5.3 If for example a student has several ongoing patients (OP's) and very few double appointments available then the student is unlikely to be allocated a NP or RE. In this instance it may be appropriate to see patients on a different day if possible or alternatively refer to a colleague whose lists may be quieter. This should be done in conjunction with discussions with the tutor and appropriate referral information should be provided. Clearly this is not always easy or possible to do but may be one option.
- 5.4 Students within a team may want to monitor NP allocation across the team and this can be done by each student running their Clinical Experience Review Report (CERR) on TM2, which shows the number of NP's and OP's a student has seen (amongst other information).
- 5.5 NP's can then be moved onto a colleagues list if they have seen fewer NP's. Again this is not always possible but is something worth considering.
- 5.6 Again, If students are concerned that there is a significant disparity, after taking specialist clinic allocation into consideration, then they should speak to their tutors, Team Leader or the Reception Manager.

## 6. FURTHER MONITORING

- 6.1 At the end of each term the numbers of NP's allocated to each student will be taken from TM2. An average of NP's seen will then be taken across each year group and any students who are significantly below the average for their year group will be placed on a priority list. The reception team will then try to allocate patients to these students as far as is possible.

6.2 Students who are on the priority list will be contacted by email to inform them.

## 7. WHAT SHOULD STUDENTS DO IF THEY ARE CONCERNED ABOUT THE NUMBER OF PATIENTS THEY HAVE SEEN?

- 7.1 Firstly students should check the average number of NP allocations which will be emailed to your year notices.
- 7.2 If your NP numbers are significantly below the average then you should have received an email confirming that you are on the priority list. If you haven't received an email then do contact the Reception Manager.
- 7.3 If you are still concerned or do not feel your situation is improving then please speak with your tutors, Team Leader or the Reception Manager in the first instance; you can also speak with the Head of Clinical Practice. It may be best in the first instance to make an appointment to see the Reception Manager who can go through your list with you; please take along a copy of your CERR.
- 7.4 Although we try to provide several different mechanisms to provide a fair a system as possible, there may still be instances where this is not fully achieved and so it is preferable that you inform us in good time so we can then act accordingly if needed.