



Type: Guide	Northumbria Blood Bikes: OARS – Shift Controller Activity Recorders – User Guide		
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A. Why do we need this guide

The work that we do, as part of the NHS, can have a direct result on the health and wellbeing of patients. It is important, therefore, that we keep accurate records of the work that we do. This document explains how the Northumbria Blood Bikes Online Activity Recording System should be used by Shift Controllers to record the details of jobs they assign.

B. Who is responsible for this guide

The ICT officer of the group is responsible for the maintenance of this guide.
The Executive Committee is responsible for approving this guide.
Shift controllers are bound by this guide to record their job details
All riders and drivers should be familiar with the information in this document.

C. When will this guide be reviewed

The guide will be reviewed a maximum of Two years following its approval.

D. How will changes be notified

The latest version of the guide will be made available via the members' library on the group website. New versions will be announced via email to all members and the executive committee.

1. Why do we record job details

1.1. The work that we do, on behalf of the NHS, can have a direct result on the health and wellbeing of patients. It is important, therefore, that we keep accurate records of the work that we do for several reasons:

- We need to report back to the Trusts that commission us on the work that we do for them.
- We need to be able to show evidence trails for the jobs that we do, as we may be audited by the MHRA, and we need to demonstrate that our processes and procedures are robust.
- We need to monitor the work that we do to ensure that we are meeting our Service Level Agreements
- We need to monitor the amount of work that we do to ensure that we have planned sufficient operational capacity to deal with the workload without putting members under undue stress
- We need accurate records of the work that we do, to inform our fundraising applications as it allows us to demonstrate that grants/gifts from donors will generate real benefits for the community

1.2. The paper receipt books that riders and drivers maintain, as jobs are carried out, form one strand of our record keeping but they are not appropriate for the timely and accurate reporting and analysis of the workload as a whole – for that we need to use the Online Activity Recorders (OARS).

1.3. The Online Activity Recorders are tailored to the type of job being recorded and by whom.

1.4. This document sets out the user instructions for the following Online Activity Recorders:

- Shift Controllers: deliveries and collections performed in the course of duty shifts

2. Accessing the On-Line Activity Recorders.

2.1. You will need to be logged in to the website to access the activity recorders.

2.2. All jobs are automatically recorded in the name of the member who has logged in, or your details will be entered into the form for you. In the event that you are entering details into the system from paper records created by another Controller, please give the name of the other Controller in the relevant place at the end of the form, if allowed.

2.3. To use the activity recorders, log in to the website and then from the menus choose:

Operations>On-Line Activity Recording

then choose required Activity Recorder from the options displayed.

2.4. The activity recorders will contain groups of fields, or multiple pages. The answers given in the earlier field groups, or pages, influence which questions are displayed later. Please answer all questions that are displayed. Items marked with a red asterisk * must be answered.

2.5. In some recorders space will be available to enter Job Receipt Numbers (JRN), for jobs that are, in fact, only an optional part of that activity. In these circumstances simply enter 0 (zero) as the JRN. This lets us know that there is nothing to report and cannot be interpreted as a missing, or forgotten, entry.

3. Locations

3.1. The activity recorders will usually need to know the collection and delivery points for the jobs. In most cases the locations can be selected from a drop down list. If you need to record a visit to a new or unusual location that does not appear in the list, please choose the option "other" and **add details of the location visited in the "notes" section for the job.** Adding the details of the new location allows us to update the drop down list if we are likely to visit that location again.

3.2. For standard jobs that we do (i.e. those not jobs not associated with the scheduled runs or relays), selecting a location is straightforward, simply choose the location we collect from and deliver to. However, for Relay jobs with other groups there are some conventions to follow.

3.2.1. For ad-hoc relays use:

Location of Caller: _Relays: BEVS, _Relays BBC, or the hospital if we are instigating the relay

Collection Location: _Relays: BEVS, Relays BEVS or hospital as appropriate

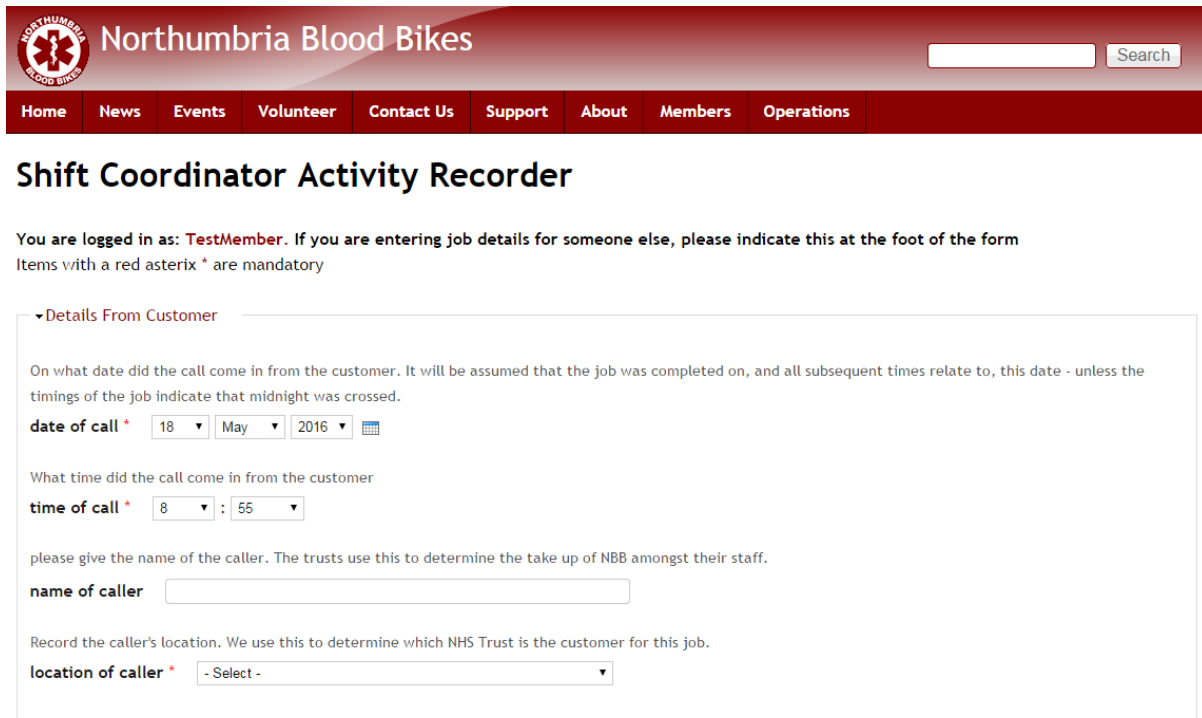
Delivery Location: as appropriate

Call Category : Relay

4. Shift Controllers, Standard Activity Recorder

4.1. The standard activity recorder should be used for all jobs -including relays and for any jobs that are 'piggy-backed' onto a scheduled run.

4.2. The first section collects details about the call from the customer.



The screenshot shows the Northumbria Blood Bikes website header with a navigation menu (Home, News, Events, Volunteer, Contact Us, Support, About, Members, Operations) and a search bar. Below the header is the title 'Shift Coordinator Activity Recorder'. A message indicates the user is logged in as 'TestMember' and that items with a red asterisk are mandatory. The form section is titled 'Details From Customer' and contains the following fields:

- date of call ***: A date picker showing 18 May 2016.
- time of call ***: A time picker showing 8:55.
- name of caller**: A text input field.
- location of caller ***: A dropdown menu with '- Select -' selected.

Date: Provide the date that the job was assigned to you. *You only need to provide this once. All subsequent times entered will be related to this date – unless you indicate otherwise below.*

Time: Provide the time that the call was received from the customer. *This is important to us as our Service Level Agreements specify a time for collection from the time the job was received/assigned.*

Name of Caller: Record the name of the contact from the hospital. *The hospital Trusts use this information to assess which departments are making most use of our service.*

Location of Caller: Record the location of the contact from the hospital. *The hospital Trusts use this information to assess which departments are making most use of our service.*

4.3. The next group of fields collects the details of the job

▼ Job Details

What is the urgency of this job. We do not have Service Level Agreements that specify delivery times - eg 'delivery within the hour'

urgency or category *

Where should we collect from

location for collection *

Where should we deliver to

location for delivery *

To authorise an emergency job (which includes the use of blue lights) we MUST have the name of a clinician who declares/authorises the emergency.

authorising clinician

What is the package - if known

Package Type

Call Category: Indicate the category of the call (urgency) by choosing from the list. *If the job is a scheduled run please use the call category “scheduled”. Choose “Relay” for ad-hoc relays with other groups, otherwise indicate “Emergency, Urgent, or Standard” as appropriate.*

Collection location: Choose the location where the package was collected from the list. *If collection involved a location that is not in the list, then choose “other” and add details in the notes section. If the collection location is the same as the caller location then this field can be left at the default – or you may choose the collection location from the list if you prefer.*

Delivery location: Choose the location where the package was delivered from the list. *If delivery involved a location that is not in the list, choose “other” and add details in the notes section.*

Authorising Clinician: If the call category is “emergency”, you will be asked to give the name of the clinician who authorised it. Note: Jobs may be despatched as an emergency pending confirmation (ie the rider/driver can prioritise this job over all others), but you must confirm the clinician’s name at some point.

Package: Indicate the nature of the package if you know it. If the package carried isn’t one of the items in the list then choose “other” and add details to the notes section of the form.

4.4. The next group of fields collects the details of the job timings

▼ Job Timings

Who was despatched to do this job
Member Despatched *

What time was the member despatched
time despatched * :

what time did we collect the package
time collected * :

what time did we deliver the package
time delivered :

Ask the rider for the number of the job receipt used to record the details of this job.
job receipt number

Member Despatched: Select the name of the member assigned to this job from the list.

Time Despatched: Indicate the time that you despatched the member. *Always use the 24hr clock – eg 2-o-clock in the afternoon should be entered as 14:00.*

Time Collected: Indicate the time that the member collected the package. *Always use the 24hr clock – eg 3-o-clock in the afternoon should be entered as 15:00.*

Delivery Time: Indicate the time that the member delivered the package. *Always use the 24hr clock – eg 10-o-clock in the evening should be entered as 22:00.*

Job Receipt Number: Enter the job receipt number for the job. *You should get this number from the rider/driver when they report the collection or delivery of a job and include the number in the activity recorder. Recording a job receipt number is mandatory.*

4.5. Finally, you can give any additional information about this job

▼ Call Taker Details

If there are any unusual circumstances to report, please do so here.

your notes go here

please describe the final status of this call

completion status

if you are entering these details on somebody else's behalf, please enter their name here:

shift controller

Notes: If there were any unusual circumstances or the called involved a new location, simply add in any notes that you wish to add.

*Be aware that these notes are only reviewed as part of our reporting cycles. If you need to report any faults with the vehicles or any unusual events regarding the handovers or the hospitals then these should be raised directly with the fleet manager, the NHS liaison officer, or any committee member in the normal way. **Do not rely on comments entered in these forms for passing on time sensitive information.***

Status: Indicate the job status. *This field is essentially present for future development and will mostly be left at the default of completed. However, this field now allows us a mechanism to record jobs that have been cancelled by the hospitals before completion.*

Shift Controller: If you are entering job details on behalf of someone else choose their name from the list. *The system will automatically record the details of the logged in user who completes the form, there is no need to select your own name in this field if you are entering details of jobs you assigned.*

Submit: When you are happy with the data you have entered click [submit]

Save for Later: If you need to break off before completing/submitting the form then you may click [save draft]. When you return to the form at a later time the partially completed form will be retrieved for you to finish off.

4.6. Submitting the form completes the process and details of this job will be available to view in the On-Line Activity Recorder Reports section of the website.

5. Exceptions and Variations

5.1. There are no exceptions or variations

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Version Control and History

Date	Version	Author:	Reason For Change
30 May 2016	1.0	Michael Thompson	First Version
1 Nov 2016	2.0	Michael Thompson	Addition of BoB Recorder and Hexham Recorder
June 2025	2.1	Michael Thompson	Removed scheduled job recorder references. Removed reference to use of blue lights.