



Type: Guide	Northumbria Blood Bikes: OARS – Standard Job Activity Recorder – 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 volunteers to record the details of jobs they assign or complete.

#### **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 are bound by this guide to record their job details.

#### **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 relevant 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 volunteers 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 Standard Online Activity Recorder which covers:

- Standard deliveries and collections performed in the course of duty shifts
- Relay and Supply jobs that are not part of a regular scheduled run
- Scheduled and Ad-Hoc jobs from GP surgeries
- Entries by Shift Controllers as well as Riders and Drivers
- Entries by committee members acting as job organisers

## 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, your details will be recorded for you.
- 2.3. To use the activity recorders, log in to the website and then from the menu 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.

## 3. Notes on 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 that begins "Other" and **add details of the location visited in the field provided**. 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 jobs not associated with the scheduled runs), selecting a location is straightforward, simply choose the location we collect from and deliver to from the drop-down lists. However, for Relay jobs either the collection location and/or the delivery location must be one of the locations beginning **\_Relays** (eg **\_Relays:BEVS**). If a job is categorised as Relay, and a **\_Relay** location is not chosen, the form will issue a warning.

## 4. Notes on Dates and Times

**4.1.** The activity recorders need the date/time that several actions took place. To avoid repetitive user input the form only asks for the date once, and then the time input for each activity is simplified. This works fine, in most instances, but there are variations.

**4.1.1.** For **riders/drivers** a job may begin in the late evening but not complete until the early hours of the following morning. The rider/driver should enter the date that the job was despatched to them and indicate that the job was completed the next day by answering "Yes" to the question "did this job cross the midnight boundary". The times entered will then be attributed to the correct dates

**4.1.2.** For **shift controllers**, a customer call may be received in the evening, but the job does not complete until the following morning. The volunteer should enter the date and time that call was received in the "Call Details" section of the form.

In the "Job Timings" section of the form the controller should indicate if the job was completed the next day by answering "Yes" to the question "Did this job cross the midnight boundary". The controller will then be asked to enter the date that the job began and should enter the date that the job was despatched to the rider. The subsequent times entered will then be attributed to the correct dates.

**4.1.3.** For **committee members**, a customer call may be received at any time of day and possibly well in advance of the job requirement. The job organiser should enter the date and time that the call was received in the "Call Details" section of the form.

In the "Job Timings" section of the form the job organiser should indicate that the job was completed on a different day by answering "Yes" to the question "did this job cross the midnight boundary". The job organiser will then be asked to enter the date that the job began and should enter the date that the job actually took place. The subsequent times entered will then be attributed to the correct dates.

**4.2.** The Activity Recorder for Standard Jobs is the first of our activity recorders to request that times are entered in five-minute intervals. Having had feedback that our other forms (which record times to the nearest minute) were unwieldy to use, and having considered any negative consequences for our reporting, we have decided to make the forms easier to use by recording all times in five-minute intervals. Other activity recorders will be updated to reflect this change.

**4.3.** Scheduled jobs have a fixed timetable, and although the job may be despatched as part of a duty shift, there is no corresponding "call" from a customer. **Consequently, the call time for all scheduled jobs should be entered by shift controllers as 07:00.** Using 07:00 as call time allows us to error check the form so that Call Time >> Despatch Time >> Collection Time >> Delivery Time must be in sequence. If a time other than 07:00 is entered for a scheduled job - a warning will be shown.

## 5. Standard Activity Recorder

- 5.1.** The standard activity recorder should be used for all jobs - including relays and for any jobs that are 'piggy-backed' onto a scheduled run.
- 5.2.** All jobs will be recorded in the name of the logged-in user. *In exceptional circumstances, a form may be completed on behalf of another member. Explain these circumstances in the "Extra Details" section of the form.*
- 5.3.** The first section determines whether you were acting as a shift controller or as a rider/driver. Once you select a role you must indicate who filled the other role.

▼ Who is filling in the form

Give details about the members involved in this job

What was your role in this job \*  Rider or Driver  Shift Controller or Job Organiser

Who was the shift controller / job organiser

Shift Controller \*

- 5.4.** If you were acting as shift controller the next section collects details about the customer call.  
*This section will not be displayed to riders and drivers.*

▼ Details From Customer

On what date did the call come in from the customer. It will be assumed that the job was completed on, and all subsequent times relate to, this date - unless the timings of the job indicate that midnight was crossed.

Date of Call \*

What time did the call come in from the customer

Time of Call \*  :

Give the full name of the caller.

Name of Caller

Record the caller's location. We use this to determine which NHS Trust is the customer for this job.

Location of Caller \*

**Date:** Provide the date that the job was called in / assigned.

*All subsequent times entered will be related to this date – unless indicated 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. For "Scheduled" jobs, the call time must be set to 07:00 to enable in-form error checking of times in sequence.*

**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. If the location is not shown in the drop-down list choose "other caller location" and a text box will open, for you to specify the location of the caller.*

## 5.5. The next group of fields collects the details of the job

▼ **Job Details**

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What was the package

Package Type \*

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 was the package collected

Location for Collection \*

Where was the package delivered

Location for Delivery \*

**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 text field that will appear.*

**Call Category:** Indicate the category of the call (urgency) by choosing from the list.

*Choose "Emergency, Urgent, or Standard" as appropriate for ad-hoc jobs called in to a shift controller. If the job is scheduled but carried out during a duty shift choose "Scheduled". Choose "Relay" for ad-hoc relays with other groups, and "Supply" for other jobs.*

**Collection location:** Choose the location for the package collection from the list.

*If the collection location is not in the list, then choose "Other collection location" and a text box will open, allowing you to specify the location.*

**Delivery location:** Choose the location for the package delivery from the list.

*If the delivery location is not in the list, choose "Other delivery location" and a text box will open, allowing you to specify the location.*


**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 the clinician's name must be confirmed at some point.*

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## 5.6. The next group of fields collects the details of the job timings.

▼ **Job Timings**

*On what date did the job begin. It will be assumed that the job was completed on the same date, and all subsequent times relate to, this date - unless it is indicated that the midnight boundary was crossed while this job took place.*

**Date of Job \*** 23 ▾ Jan ▾ 2026 ▾ 

*To correctly process the dates and times, indicate if this job finished on the day after it began. That is, did this job begin before midnight but finish after midnight?*

**Midnight Crossed**  Yes  No

*What time was the rider or driver despatched*

**Time Despatched \*** Hour ▾ : Minute ▾

*What time was the package collected?*

**Time Collected \*** Hour ▾ : Minute ▾

*What time was the package delivered?*

**Time Delivered \*** Hour ▾ : Minute ▾

*What is the Job Receipt Number for this job.*

**Job Receipt Number \***

*What is the Job Receipt Number for the associated relay job*

**JRN for Internal Relay**

**Date of Job:** Enter the date that the job started.

*This field is not shown for shift controllers.*

**Midnight Crossed:** Indicate if this job started before and finished after midnight.

*This helps us perform error checking and to ensure the times are added to the correct date.*

**Time Despatched:** Indicate the time that the job was given to a rider / driver.

*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 package was collected.

*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 package was delivered.

*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. *Recording a JRN is mandatory.*

*The rider/driver will give this to the shift controller when they report the collection or delivery of a job.*

**JRN for Internal Relay:** Where a job entails a package being carried by two NBB vehicles (an internal relay) enter the job receipt number for the job performed by the other NBB vehicle.

*This field will only be visible when the collection or delivery location is “\_Relays: NBB Handover”.*

**5.7.** Next, you can give any additional information about this job that made it unusual or noteworthy

▼ **Extra Details**

*If there are any extra details, or unusual circumstances to report, please do that here.*

your notes go here

Describe the final status of this call

Completion status  completed  cancelled

*Be aware that these notes are only reviewed as part of our reporting cycles.*

*If you need to report any faults with the vehicles these should be raised directly with the fleet team using the reporting tool on the NBB website.*

*If there were unusual events regarding the handovers or the hospitals then, contact the NHS liaison officer, or any committee member in the normal way.*

**Do not rely on comments entered in the activity recording forms for passing on time sensitive information.**

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

**5.8.** Finally, review the warnings section of the form. *Warnings are shown when the answers given look out of the ordinary or are mismatched. You must review your entries and either correct your data or confirm that the data you have entered is correct and the warning is accepted.*

▼ **Warnings**

*Check any messages shown here - they may highlight discrepancies in your entry*

*Nearly all packages from GP Surgeries are delivered to Freeman Hospital.  
Check that your delivery location is correct*

*Nearly all package collections from GP Surgeries are scheduled (even when carried out as part of a duty shift).  
Check that your job category is correct*

*If any warnings are shown, you must check your data, correct it if necessary, and confirm that the data entered is correct despite any warnings.*

Confirm Warnings Accepted  Yes  No

**5.9.** Submit or save the form

**Submit:** When you are sure data you have entered is correct, click **[Submit Job Details]**

*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.*

## 6. Exceptions and Variations

- 6.1. If the package type is “Blood Box for GNAAS resupply” the job category will be set to “Supply”, the collection location will be set to “RVI” and the delivery location will be set to “GNAAS”.
- 6.2. If the package type is “Blood Box Returned GNAAS resupply” the category will be set to “Supply”, the collection location will be set to “GNAAS” and the delivery location will be set to “RVI”.
- 6.3. Except for jobs that cross a midnight boundary, the times entered must follow the sequence: Delivery time must be greater than Collection time which must be greater than or equal to Despatch time.
- 6.4. If the call category is selected as “Relay” then either the collection location or delivery location should begin with “\_Relay”. If not, then a warning will be shown.
- 6.5. When the form is completed by a Shift Controller, or Job organiser, they will complete the “Date of Call” field so the “Date of Job” field will not be shown.
- 6.6. As a shift controller, or job organiser, you will be asked to give the date that the call came in from a customer. Unless you indicate that the job **did not** finish on that date, all subsequent times will be assumed to relate to that date. If you indicate that the job did not finish on the date of the call you will be asked to confirm the date on which the job **Started**. This allows us to accurately record when calls came in, for example, for relays, or milk runs, and the date the job actually took place, which can be later, as well as catering for late evening jobs which simply span midnight.
- 6.7. Scheduled jobs have a fixed timetable, and although the job may be despatched as part of a duty shift, there is no corresponding “call” from a customer. **Consequently, the call time for all scheduled jobs should be entered by shift controllers as 07:00.** Using 07:00 as call time allows us to error check the form so that Call Time >> Despatch Time >> Collection Time >> Delivery Time must be in sequence. If a time other than 07:00 is entered for a scheduled job - a warning will be shown.
- 6.8. Once a warning has been shown, you must review the highlighted data and correct it if necessary. You will have to confirm that the data has been reviewed and any warnings shown are accepted and that the data you have entered is correct before the form can be submitted.

**Northumbria Blood Bikes:  
OARS – Standard Job Activity Recorder – User Guide**

**Version Control and History**

<b>Date</b>	<b>Version</b>	<b>Author:</b>	<b>Reason For Change</b>
1 Feb 2026	1.0	Michael Thompson	First Version. Document rewritten to reflect the move to a single, shared activity recorder for all members for standard jobs.
1 April 2026	1.1	Michael Thompson	Clarification added to “Call Times” for scheduled jobs.