

# Patient Advice & Support Service



**Annual Report  
2013-2014**



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## Highlights of 2013/14

The Patient Advice and Support Service (PASS) is delivered by the Scottish Citizens Advice Bureau (CAB) Service. The service is independent and provides free, confidential information, advice and support to anyone who uses the NHS in Scotland. It aims to support patients, their carers and families in their dealings with the NHS and in other matters affecting their health. In 2013/14, PASS supported:

**2336 new clients**  
 An increase of 16%  
from 2012/13

**7424 enquiries**  
 An increase of 27%  
from 2012/13

### Service review

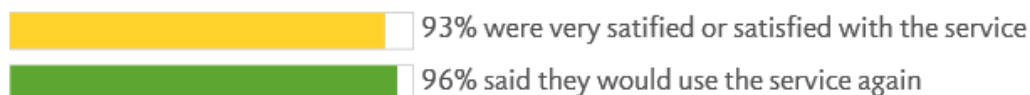
In autumn 2013, the PASS Service Review highlighted “excellent/strong working relationship between NHS Complaints Staff” and the ability of Patient Advisers to develop good relations with clients and provide a person-centred approach.

### Marketing

In February 2014 a PASS Marketing Officer began working at Citizens Advice Scotland (CAS). The main purpose of this newly created position is to raise awareness of PASS within the NHS in Scotland and initially in five Health Board areas. CAS believes that it is vital to raise awareness of the service amongst NHS staff who can refer clients to bureau.

### Client feedback

Independent feedback found that:



### PASS website

The PASS website was launched in early 2013 and in 2013/14 just under 10% of all PASS clients contacted the service via the website’s contact form. CAS expects to see this number increase as the service is further promoted and the profile raised.

### Praise from the Scottish Public Services Ombudsman (SPSO)

In 2013, Jim Martin, the Scottish Public Service Ombudsman praised both the bureaux service and the Patient Advice and Support Service saying “In our experience, the support provided to clients by bureau advisers is of a high quality... we value the work of Patient Advice and Support Service (PASS) workers in NHS settings.”

### Building relationships at the Regional Events

The annual Regional Events with NHS Complaints Personnel, Patient Advisers and the Scottish Health Council were very well received with feedback stating:

"Enjoyed opportunity for discussion"

"Really enjoyed it, very beneficial"

"A very good mix of people / specialities"

## What the service does

The Patient Advice and Support Service promotes an awareness and understanding of the rights and responsibilities of patients. It also advises and supports people who wish to give feedback, make comments, raise concerns or make a complaint about treatment and care provided by the NHS in Scotland.

The Patient Advice and Support Service:

- Helps clients understand their rights and responsibilities as patients
- Provides information, advice and support for those wishing to give feedback or comments, raise concerns or make complaints about health care delivered by the NHS in Scotland
- Ensures clients feel listened to, supported and respected when raising concerns about difficult experiences
- Works with the NHS to use feedback to improve NHS service provision.

Statistical information about the work done by the Patient Advice and Support Service in 2013/14 is available in the accompanying Annual Report Appendix.

### Case study 1

The client was referred to PASS from another member of CAB staff who had

- contacted Social Work
- submitted a formal complaint regarding lack of support from Social Work
- written to the Mental Welfare Commission
- met with the client on a number of occasions with the client's advocate and
- sought advice and assistance from the Civil Legal Assistance Office.

As Adult Social Care has been integrated within the Health Board, the case was referred to PASS at that stage. The Patient Adviser wrote to the relevant NHS Area Manager seeking support and a review of the case as 6 months had elapsed since the client first came to the bureau. Whilst it had been recognised that the client's current residential care was inappropriate, there was no other appropriate supported accommodation available. This left the client unable to get out and take part in activities or socialise.

Following a review by the client's Social Worker and one based in the locality where the client was now residing, arrangements were put in place with local partnership agencies to arrange visits and outings for the client. **A full explanation was given to the client as to why they could not be relocated at the time.**

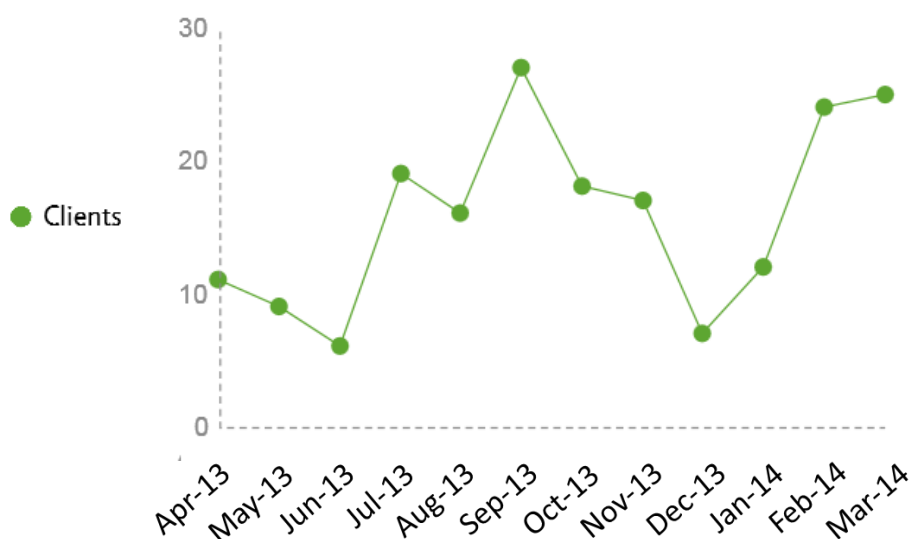
**The bureau is also seeking a review of the terms of the client's financial and welfare guardianship order.**

## What we have done in 2013/14

This year saw the Patient Advice and Support Service continue to develop and increase client numbers. There was a successful Service Review and a Marketing Officer has been employed at CAS to raise awareness of the service amongst NHS staff.

### PASS website

Early 2013 saw the launch of the PASS website at [www.patientadvicescotland.org.uk](http://www.patientadvicescotland.org.uk). Shortly afterwards, a contact form was added to the website. When clients fill in their details here, this information is forwarded to the client's local bureau, providing an alternative means of accessing the service. An average of 16 clients per month (a total of 191 in 2013/14) accessed the service in this way. This is just under 10% of all PASS clients. Details of this are in the graph below.



### Patient Adviser training

Regular Patient Adviser training days are held at the CAS offices in Edinburgh. These provide a useful opportunity for the Patient Advisers to share best practice, develop relationships and support each other. In 2013/14 Patient Advisers heard from speakers from the Scottish Health Council, Healthcare Improvement Scotland, the Office of the Public Guardian and Patient Opinion. In addition, the General Dental Council attended a Patient Advisers meeting in Grampian and local officers from the Scottish Health Council attended a Patient Advisers meeting in Highland.

Patient Advisers report that face to face meetings are invaluable to clients, giving them the chance to get answers to questions and an understanding of what has happened to them or the person they are raising the issues about. It is particularly helpful when clients are informed of the changes that will be made as a result of the issues raised.

### Case study: Raising issues with the NHS and benefits checked

The client wished to raise a complaint as he suffered a fracture which was not picked up after an initial x-ray, but 8 days later. The Patient Adviser met with the client at his home and advised him of the NHS Complaint procedure. Together they wrote a formal complaint letter.

The response from the NHS identified that the fracture was missed by the Radiologist and the Consultant, and only upon review was this fracture identified. **The NHS apologised for the failing and explained that the Consultant has reviewed how x-rays are reviewed when received from Radiology.** The response also identified that the client should have been admitted to a ward after his x-ray and that it was totally unacceptable that the client was left on a trolley in a corridor. **The NHS apologised unreservedly for this failing.** The client was satisfied with the apologies received.

Given the age of the client and mobility issues, **the client was referred to a Welfare Rights Adviser in the bureau** for a benefits check.

## PASS Marketing

In February 2014 a PASS Marketing Officer began work at Citizens Advice Scotland. The main purpose of this newly created position is to raise awareness of PASS within the NHS in Scotland and initially in five Health Board areas. The five target Health Board areas are Dumfries and Galloway, Fife, Forth Valley, Grampian and Highland. Promotion has been and will be done through a variety of means including stands at various conferences and within hospitals, distribution of promotional material and developing relationships with key NHS staff. The PASS Marketing Officer will also promote the service at a national level.

## Regional Events

Two Regional Events, attended by Patient Advisers, Complaints Officers/Managers and Scottish Health Council staff, were held with the NHS Complaints Personnel Association for Scotland in the spring. Speakers from NHS Education for Scotland discussed Information Governance, and the e-modules they developed with the Scottish Public Services Ombudsman (SPSO). The SPSO gave an update on their current work and training on listening skills. This was followed by a networking session where participants were given topics to discuss with each other for 5 minutes at a time. Feedback showed this to be a really useful way to network. CAS received very positive feedback from both events in Glasgow and Dundee including:

"The day was valuable as the information is very relevant to my current work projects"

"Enjoyed opportunity for discussion during ...networking"

"A very good mix of people / specialities which led to an enjoyable experience for learning / networking"

## Scottish Public Service Ombudsman praises PASS

In the March 2013 SPSO Newsletter Jim Martin, the Ombudsman publicly praised PASS and the bureau service, saying “I particularly value the work of Citizens Advice Bureaux (CABx), for a number of reasons...CABx located across Scotland provide a **welcome signposting service** to members of the public who have problems with public services. In our experience, **the support provided to clients by bureau advisers is of a high quality**. Similarly, we value the work of Patient Advice and Support Service (PASS) workers in NHS settings, and are keen to continue our links with them as we did this month, when we participated in their regional meetings”.<sup>1</sup>

CAS welcomed this recognition of the work bureaux and Patient Advisers do and looks forward to continuing to develop their relationship with the SPSO.

## Statistics

In 2013/14, there were 2336 new clients and 7424 new enquiries of which:



25% of new enquiries were dealt with by Generalist Advisors



92% of new enquiries were at level 3 or above

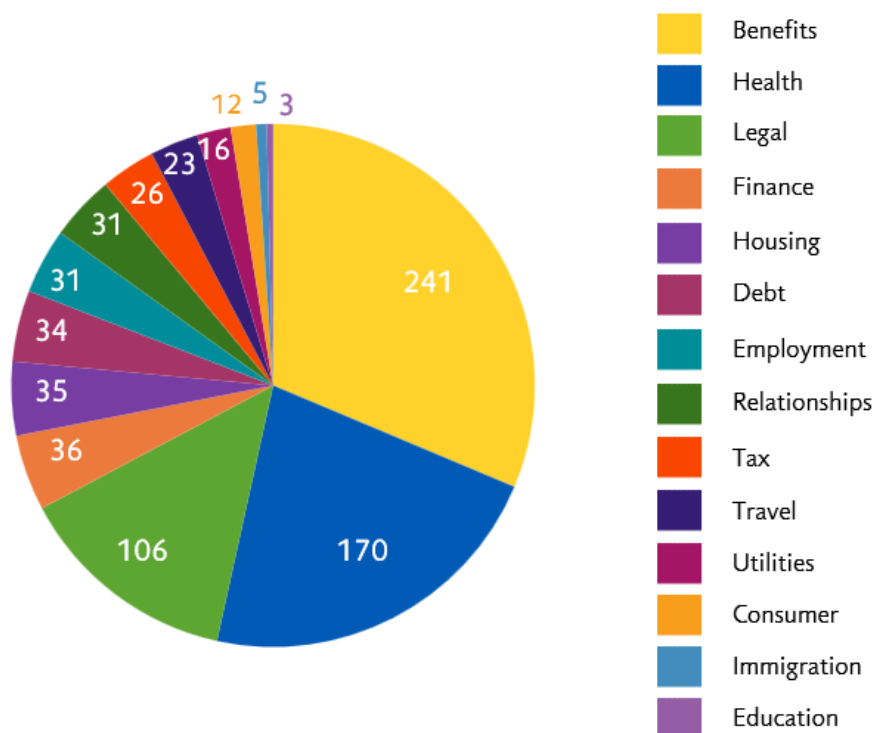
As well as the 29 Patient Advisers providing specialist support to clients, being delivered by the Scottish CAB service means that clients benefitted from the support provided by Generalist Advisers in bureaux. These advisers provided information, advice and support about PASS and other issues which may affect clients' lives.

The most frequently recorded areas of feedback, comments, concerns and complaints are listed below:



<sup>1</sup>SPSO NEWS <http://tinyurl.com/lsvqu5n>

Patient Advice and Support Service clients benefit from the holistic information, advice and support that the Scottish CAB service provides. The value of this is demonstrated by the figures below which show that clients received advice about an area other than NHS feedback on 769 occasions. Clients raising feedback, comments, concerns or complaints about the NHS were also advised on a range of issues from benefits to employment and housing to immigration.



## Service Review

In autumn 2013, a PASS Service Review was carried out. This included a review of bureau opening hours, client satisfaction, and client numbers at each bureau.

## Achievements

Areas of good practice which bureau highlighted were

- Excellent/strong working relationship between NHS Complaints Staff, the bureaux manager and Patient Adviser which ensures “maximum cooperation and joined up thinking but **retains autonomy** of [the] Patient Advice Support Service.”
- Patient Advisers ability to
  - develop good relations with clients with a **person-centred approach** and
  - Write and redraft letters on behalf of clients, which are "**often complex and cover ...several issues.**"
- In several Health Board areas the Patient Advisers spend time each week at the Patient Information Centres/Points where they have access to private interview space if required which has been really helpful.

One bureau commented that the added value of PASS being delivered by the Scottish CAB Service is “**the resources within bureau which enable us to provide a one-stop shop regarding benefits, debt, housing and relationship issues.** For example in a recent case of a (young) man who had been diagnosed with a terminal illness, **we could deal with his NHS issues sensitively and quickly** and assist with accessing benefits during the same appointment **which made it an easier experience for him and his distraught family.**”

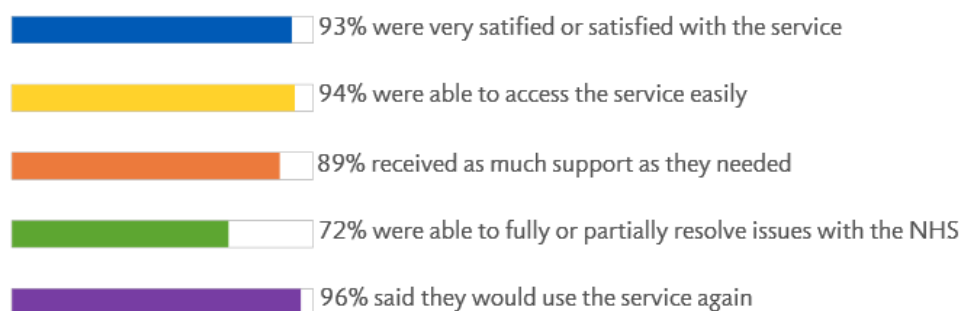
The opening hours of Scottish bureaux **increased by a total of 116 hours per week** between July 2011 and October 2013. This means that more bureaux are open for more hours which provides increased routes of access to PASS, making it easier for clients to use the service where they live. The added value of PASS means there is also increased access for clients to Generalist Advisers in bureau and the support they can provide on issues affecting clients' lives.

## Next steps

The most consistently mentioned issue for improvement was the need for the NHS to raise awareness amongst their staff about PASS and display leaflets and posters which they have been given. It is planned that this will be addressed by the PASS Marketing Officer, and lead to an increase in NHS referrals to the service. Other outcomes of the review are for CAS to provide information on how long clients are waiting to access the service and to create a template for good practice for PASS.

## What our clients and stakeholders think

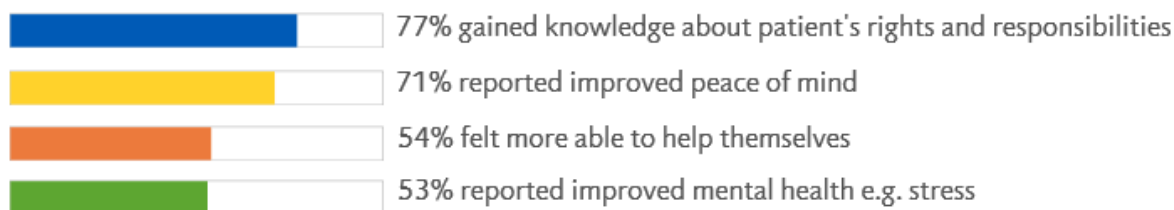
The Scottish Health Council (SHC) is responsible for collating PASS client feedback. This was carried out on an ongoing basis from October 2012 and by May 2013, the SHC had received 103 completed questionnaires. By August 2013 this figure had increased to 132.<sup>2</sup> During April and May 2013 the SHC also gathered feedback from CAB Managers, NHS Boards and local PASS Advisory Groups. The findings are below;



<sup>2</sup> Patient Advice and Support Service (PASS) Mechanisms for Client Feedback, Scottish Health Council, November 2013, paper presented to PASS National Advisory Group meeting, 30<sup>th</sup> January 2014.



The advice and help given to respondents by PASS helped to improve the following:



### Case study - PASS raises awareness of patient's rights and responsibilities

As a Patient Adviser discussed a client's complaint she established various issues which were the responsibility of the client to adhere to. The Patient Adviser advised the client of their rights to complain and provided information on the complaints process. As part of her work, the Patient Adviser also met with a Consultant to establish the facts around the client's surgery.

As the client and Patient Adviser accessed the client's medical records they established that the client had not complied with post-surgery treatment, for example by attending physiotherapy. The Patient Adviser explained to the client that if a complaint was submitted then the NHS would probably answer her concerns but it would be unlikely that it would go any further because the client had not followed recommended treatment. Once the patient knew their responsibilities as a patient it was decided that there would be no complaint and no claim for damages.

The work done by the Patient Adviser meant that the NHS did not receive a complaint, which saved them time and money, and the client was made aware of their rights and responsibilities in adhering to post-surgery treatment.

## Stakeholder Feedback

Most stakeholders provided positive feedback and stated that openness, good communication, good working relations and a holistic approach were what worked well with the PASS. It was felt that it was too early to comment on the impact of the local advisory groups although most Health Board areas (11) had established a local group and had met once so far. Stakeholders felt it would be useful to be updated on what is being discussed at the National Group and to share good practice from other Health Board areas as well as investigate the level of consistency.

There was a great deal of positive feedback from all stakeholders, in particular the clients who responded to the user feedback questionnaire. Potential areas for improvement included:

- increasing awareness of PASS
- improving access to the service, and
- developing a more responsive client feedback system.

## Recommendation

As varying amounts of client feedback were received from each Health Board the SHC recommended that the system of continuous user feedback be replaced by a snapshot survey taken at a certain point in the year. It is hoped that concentrating efforts to gather feedback during a shorter timescale and using methods other than a paper based questionnaire will improve return rates.

## Local Advisory Groups

The aim and role of the Local Advisory Groups (LAGs) is to provide information, advice, guidance and assistance in the planning and development of PASS in the local health board area. The LAGs will assist the Health Board and CABx to ensure that the service delivered is efficient, effective and is tailored to meet the needs of its users. LAGs have been established in half the Health Board areas. Two areas who had not set up LAGS reported that there had been discussion about establishing the group. Membership of these groups varies and includes Scottish Health Council Local Officers, Citizens Advice Bureau managers, Patient Advisers, members of the NHS Public Partnership Forum, NHS Complaints Managers and Officers, NHS Managers and third sector representatives.

### Listening and Learning

In early 2014, the SHC in conjunction with Healthcare Improvement Scotland produced a report, 'Listening and Learning - How Feedback, Comments, Concerns and Complaints Can Improve NHS Services in Scotland'. The report authors visited all 21 of Scotland's NHS Boards to hear about how they gather and listen to feedback, comments, concerns and complaints and learn from this to improve the services they provide. The report commended and endorsed the work done by PASS and strongly encouraged Health Boards to strengthen links with PASS and to promote the service further within their Health Board Areas.<sup>3</sup>

#### Recommendation 7

"Awareness of the role and availability of the Patient Advice and Support Service...should continue to be raised locally and nationally."

## Complaints

Every quarter, CAS gathers performance management information from bureau. One of the questions asked is whether there have been any complaints about the Service and if there are any, what stage they were resolved at. In the year from 1st April 2013 to 31st March 2014 there was 1 complaint about the Service. This was in NHS Lothian. The complaint was closed at Stage 1 (Formal internal investigation by manager or delegated staff).

<sup>3</sup> Listening and Learning- How Feedback, Comments, Concerns and Complaints Can Improve NHS Services in Scotland- <http://tinyurl.com/l5v6n5v>

## Integration of Health and Social Care

The establishment of the Patient Advice and Support Service was specified in the Patient Rights (Scotland) Act 2011. As this Act is one of those identified for inclusion in the transfer of functions between Health Boards and Local Authorities, there will be a requirement to consider the potential implications for the Patient Advice and Support Service in terms of integrated functions. The implications may include:

- Staff training and awareness raising for CAB Advisers and Patient Advisers but also for staff working in new NHS structures and services. This will need to cover existing complaints procedures (NHS, Local Authority, Social Work and Care Inspectorate); which to apply and when; up-coming changes to these as regulations are amended; good practice, etc.
- A clarification of the PASS remit
- Information provision for CAB Advisers and Patient Advisers
- The development of closer working relationships with Social Care regulators, so that referral pathways can be put in place
- Possible changes in advisory group membership and communications with statutory bodies
- The need for local PASS services to extend the range of groups and organisations with which they work in partnership, take referrals, etc.

### Case study: Improving NHS communication

The Patient Adviser met a client to go through medical correspondence and details of a complaint relating to her late father. The Patient Adviser drafted a letter with the client for the NHS Complaints Team. The Patient Adviser subsequently supported the client at a meeting with members of the Clinical Management Team.

The NHS gave the client assurance that both medical and nursing staff would be spoken to in relation to **giving effective and appropriate communication with patients and their families** so that they can share the learning from their experience to benefit others. The Chief Nurse acknowledged that there had not been prompt enough discussion with relatives and that the family had had to be proactive in approaching staff. It was confirmed that this is an area that will be looked at by the Clinical teams.

**Apologies were made regarding the lack of information on the Liverpool Care Pathway and Do Not Attempt Resuscitation.** The NHS stated that work would be carried out with medical and nursing teams to **improve this** and this could be **shared with a wider group at Clinical Management Group meetings.**

## Summary

In 2013/14 the Patient Advice and Support Service supported more clients with more enquiries than in the previous year. The number of new PASS clients increased by 16%, and the number of enquiries increased by 27%. The case studies within this report highlight the positive outcomes for individuals and changes in NHS practices as a result of the issues raised by these clients.

### Marketing

Citizens Advice Scotland wanted to address marketing of the service. This has been made possible with the employment of the PASS Marketing Officer whose work will continue in the year 2014/15, raising awareness of the service within the NHS.

### Joint training at the Regional Events

The annual Regional Events organised for NHS Complaints Personnel, Patient Advisers and the Scottish Health Council were very well received with positive feedback. These provide a welcome opportunity for joint training and networking.

### Listening and Learning

The Scottish Health Council's Listening and Learning Report commended and endorsed the work done by PASS and strongly encouraged Health Boards to strengthen links with PASS and to promote the service further within their Health Board Areas. CAS looks forward to working towards these aims in the coming year.

### Case study – taking cases to the SPSO

Following the death of their father, his family felt that the care and treatment and delay in the transfer to another hospital contributed to his death. The Patient Adviser explained the NHS complaints procedure and with the client's agreement wrote a letter to the NHS. The NHS response letter addressed each area of concern. The client was dissatisfied with the response.

The Patient Adviser explained the SPSO complaints procedure. The client requested that the NHS complaint be referred to the SPSO for consideration. The Patient Adviser completed the SPSO referral form and drafted an accompanying letter. The Patient Adviser received regular monthly updates from the SPSO investigator and met with the client on several occasions to discuss the progress of the case.

Following the completion of the SPSO investigation the complaint was upheld. The SPSO report stated that staff at the hospital failed to provide appropriate care and treatment following admission. The SPSO's recommendations included -

- a. Apology for failures identified.
- b. Reflect on the failure and ensure that measures are in place to prevent a similar occurrence in the future.
- c. Undertake an audit of record-keeping to ensure medical records are completed timeously and comprehensively and report back to the Ombudsman.