



# **Joint inspection of adult services**

## **Integration and outcomes**

Partnership Guide v4.0

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# Partnership Guide

## Purpose

This document provides an overview of and week-to-week guide to the inspection process for Health and Social Care Partnerships (referred to as the HSCP or partnership). It describes key inspection events/activities for each week and the actions the HSCP needs to complete. Links are provided throughout the guide to more detailed guidance where this is available. Most of these are in the week-to-week guide which starts on page 9. It is important that the more detailed guidance is read in conjunction with this guide.

## Background

The Care Inspectorate and Healthcare Improvement Scotland share a common aim that the people of Scotland should experience the best quality health and social care. We work together to deliver programmes of scrutiny and assurance activity that look at the quality of integrated health and social care services and how well those services are delivered. We provide assurance that gives people confidence in services. Where we find that improvement is needed, we support services to make positive changes.

## Legislative Context

The Public Services Reform (Scotland) Act 2010 places a duty on a range of scrutiny bodies to cooperate and coordinate their activities, and to work together to improve the efficiency, effectiveness and economy of their scrutiny of public services in Scotland. Healthcare Improvement Scotland and the Care Inspectorate have been working in partnership under the direction of Scottish Ministers to deliver joint inspections of services for adults since 2013.

The Public Bodies (Joint Working) (Scotland) Act 2014 sets the legislative framework for integrating health and social care. The aim of integration is to ensure that people experiencing care have access to good quality health and care services that are delivered seamlessly and contribute to good outcomes. This is particularly important for the increasing numbers of people with multiple, complex and long-term conditions. The Care Inspectorate and Healthcare Improvement Scotland have joint statutory responsibility to inspect and support improvement in the strategic planning and delivery of health and social care services by integration authorities under Sections 54 and 55 of the Act.

## Ministerial Strategic Group Report

In February 2019, following a review of progress with integration, the Ministerial Strategic Group (MSG) for Health and Community Care made proposals to ensure the success of integration going forward. With regard to scrutiny activity, the MSG asked that joint inspections should better reflect integration. Specifically, the Care Inspectorate and Healthcare Improvement Scotland should ensure that:

- strategic inspections are fundamentally focused on what integrated arrangements are achieving in terms of outcomes for people.
- strategic inspections examine the performance of the whole HSCP – the health board, local authority, and integration authority, and the contribution of non-statutory partners to integrated arrangements, and
- there is a more balanced focus across health and social care in strategic inspections.

## Revised approach to joint inspections of services for adults

In response to the MSG recommendations, the Care Inspectorate and Healthcare Improvement Scotland have set out our planned approach for this phase of joint inspections. These will seek to address the following question:

**How effectively is the partnership working together, strategically and operationally, to deliver seamless services that achieve good health and wellbeing outcomes for adults?**

We have an established joint inspection methodology, which we have continuously developed and improved based on our learning from previous inspections. Our underpinning Quality Improvement Framework has been updated to reflect a shift in emphasis towards the experiences and outcomes of people experiencing care. The illustrations in the Quality Improvement Framework have been developed in the context of, and built around the requirements in, the national health and wellbeing outcomes framework, the integration planning and delivery principles, MSG recommendations and the national health and social care standards.

## Adapting to circumstances

Our joint inspection activity in adult services recognised the impact Covid-19 had on HSCPs. Scrutiny approaches and activities take cognisance of changes brought about by, and following, the pandemic, and how services may have evolved.

The partnership guide which lays out our ‘footprint’ for inspection activity is based on our established methodology and tools. We have sought to make this ‘footprint’ a better fit for our scrutiny through exploring with each partnership whether particular activities can be better delivered ‘on-site’ or remotely. This has led to us providing a hybrid approach which combines what is best from remote and on-site working. This takes into account the needs and preferences of the people experiencing care we want to engage with, the systems and processes within partnerships, scrutiny team capacity, and local geography, where relevant.

## **The approach to inspection explained**

We will conduct a rolling programme of themed inspections, scrutinising how integration of services positively supports the experiences and outcomes of people experiencing care. These thematic inspections are not focused on the quality of specialised care for each care group but are a means of identifying groups of people with similar or shared experiences through which to understand how health and social care integration arrangements are contributing to good outcomes.

We are looking at integration through the ‘lens’ of different care groups which taken together, will in time build a picture of what is happening across health and social care integration, how this is experienced by people experiencing care, and the outcomes achieved.




## **What health and social care partnerships can expect**

Our joint inspection of each HSCP will identify how well integrated arrangements are supporting good outcomes or where improvement is needed. Our reports will provide assurance and value to HSCPs’ internal performance management, joint working, and quality assurance processes, while focusing on outcomes for people experiencing care.

This inspection looks at integration from the perspective of people with a learning disability and who are 18 years of age or older.

## **Overview of the inspection process**

The inspection will take approximately seven months from the point when your HSCP is formally notified of inspection to the date when our inspection report is published. Your HSCP and our inspection team will work collaboratively to deliver the activities that make up the inspection process:

	<h3>Identifying the inspection coordinator</h3>
<p>By the end of <b>Friday of week 2</b> following notification, your HSCP will need to identify and provide the inspection team with contact details of the staff member it has allocated to the role of inspection coordinator. The coordinator has the pivotal role of coordinating the partnership's response throughout the inspection. This includes supporting the engagement process, helping organise surveys and questionnaires, and ensuring the correct staff participate in focus groups, partnership meetings and briefings. It includes timetabling for scrutiny focus groups and team around the person sessions. It also includes completing (or facilitating the completion of) the position statement and uploading any supporting evidence. The coordinator also has a role in facilitating the production of the information required to select a sample of people whose records will be reviewed, through ensuring the completion and upload of the Pre-Inspection Return (PIR) and the initial case tracker.</p>	
	<h3>Staff survey</h3>
<p>Your HSCP will need to identify relevant staff and send them a link to the staff survey by <b>week 6</b> of the inspection. The staff survey is designed to be completed independently by individual staff members. This means the staff survey link should be circulated to staff in partnership services which support people with a learning disability, including third sector and independent sector services. The staff survey closes at the end of <b>week 9</b>.</p>	
	<h3>Position statement and supporting evidence</h3>
<p>Your partnership needs to complete and upload the position statement template by <b>12pm on Monday of week 11</b>, along with relevant supporting evidence. Your position statement should provide a brief summary of your partnership's current position. It should provide a brief description of your partnership's context and an overview of where you think your partnership is in relation to the required quality indicators in the Quality Improvement Framework. This will help the inspectors to understand your organisation.</p> <p>The position statement should be accompanied by supporting performance data and information and an organisational chart. The position statement template provides guidance about volume and types of supporting evidence required. This can include up to three examples of positive practice initiatives that specifically illustrate integrated working and positive outcomes for people. If you have any questions, the inspection lead will be happy to have a discussion with you to help you to identify your best evidence. Taken together, the position statement and supporting evidence will help inspectors identify areas for further discussion and scrutiny during the inspection.</p>	



## Engagement

Our joint inspections have a significant focus on engaging with people who use health and social care services, and with their unpaid carers. The inspection team will organise an initial period of engagement through local services and groups and will begin contacting them shortly after the partnership is notified of inspection. This may include services provided and staffed by the partnership. Inspectors will ask services and groups to help identify and support people who use services along with unpaid carers who may wish to participate. To make sure that no relevant services or groups are missed, the HSCP is asked to supply a list of relevant services and groups that support people with a learning disability by **5pm on Thursday of week 3** of the inspection. The inspection team will cross-reference this list with the services and groups it has identified when preparing for the inspection.

People will be able to tell us about their experience by choosing to complete a questionnaire, participate in a focus group or have a one-to-one conversation with a member of the inspection team. The questions and topics covered within these three activities are based on our Engagement Framework. This sets out 12 personal statements that are matched to relevant quality indicators from the Quality Improvement Framework. We ask that people and carers are supported to complete the questionnaires as much as possible by provider staff.

It is a key principle for us that our engagement with people should be meaningful and appropriate, which is why we aim to work closely with local services and groups and the HSCP to make sure we get it right.

The main engagement phase will take place during **weeks 8 and 9**. The engagement phase will be completed by **week 10** in order that the results can inform the rest of the inspection. In the event that initial engagement activities do not identify enough people, additional conversations and focus groups may be undertaken in **weeks 10 and 11**, working with the partnership to contact people listed on the PIR who have not been selected for record review.



## Selection of records to review

The inspection team will review the health and social care records of a random sample of people who use health and social care services and their unpaid carers. It is important that you start to identify the information that the inspection team will require to select people. This should be as soon as possible after you receive the notification letter. You will have four weeks to complete and upload the Pre-Inspection Return (PIR) by **12 noon on Friday of week 6**. The PIR provides details of people from whom the random sample will be selected. The inspection team will identify an initial random sample of 100 people from the PIR and then ask the partnership to provide information on the carer support and health inputs those individuals receive. This should be completed and returned, using the initial case tracker spreadsheet by **12 noon on Friday of week 10**.



Your HSCP is also asked to identify good practice relating to three individuals where you believe your approach to integration has achieved good outcomes. It is up to the HSCP to determine how it will identify individuals in the good practice sample. Details of the three individuals also need to be provided to the inspection team on the initial case tracker spreadsheet by **12 noon on Friday of week 10**.

There is detailed guidance on the sampling process and the preparation of records. It is critical that the random sample of individuals is finalised by **week 11** (or **Monday of week 12** if resampling is required).

If records are to be read on a secure data sharing platform, the relevant records must be prepared and uploaded to the platform by **midday on Wednesday of week 14** in order for records to be reviewed in **week 15**. It is preferable that the HSCP gives the inspection team access to its own secure data sharing platform, if it has one. However, if not, the partnership can be given access to the Care Inspectorate's SharePoint platform.

If the partnership plans to give inspectors access to its recording systems, arrangements must be made in good time for all inspectors to have system access by 9am on **Thursday of week 14**. We ask that in this case, the partnership provide training to the inspection team in use of their online systems on **Thursday morning, week 14**.

If, in discussion, we have agreed with the HSCP that records will be read onsite, there is separate guidance for this and we will discuss with you how to manage this process. If there are paper records to be read onsite, they must be available to sign over to the inspection team first thing on Monday morning of **week 15**.

	<b>Reviewing records</b>
	<p>The inspection team will review and analyse the health and social care records of people selected in the review of records sample (and their unpaid carers where this is applicable). Records will be reviewed from <b>Monday to Wednesday of week 15</b>. There is provision to continue into Thursday morning if this is required.</p> <p>If paper records are to be read onsite, a representative of the partnership will need to be available to physically sign the records over to the team on Monday morning and sign them back at the end of the review period.</p> <p>Inspectors' access to electronic systems will be removed as soon as the review of records is complete.</p>
	<b>Team around the person</b>
	<p>The team around the person stage provides a second opportunity for the inspectors to engage with people and unpaid carers. The inspection team will select a proportion of the people whose records they have reviewed for team around the person follow-up sessions. These involve separate discussions with the team of paid staff supporting each person, the person themselves and their unpaid carer(s). The discussions give the inspection team an opportunity to gain greater insight into what they have seen in the person's records. If there are any people identified for 'team around the person' who we have already spoken to, we would only speak to staff teams and not repeat speaking to the person or carer.</p> <p>To allow the HSCP more time to organise these sessions, the inspection team will identify a provisional group of people from the final review of records sample in <b>week 11</b>. The inspection team will then review the selection as it reviews records (<b>Monday to Thursday week 15</b>) informing the HSCP of any changes. The inspection coordinator will need to be ready to work with the inspection team's strategic support officer (SSO) from the end of <b>week 15</b> to the end of <b>week 16</b> to swiftly finalise the sessions with staff, people and their carers which will take place in <b>weeks 17 and 18</b>. As such, <b>Week 16</b> is a busy week, so the coordinator will need to be fully available.</p> <p>Early preparation for these weeks is vital and the draft timetable for team around the person sessions (and final timetable for scrutiny focus groups) needs to be uploaded by <b>midday on Friday of week 13</b>. The final version of the timetable including both team around the person and scrutiny focus groups needs to be uploaded by noon on <b>Wednesday of week 16</b>.</p>





## Scrutiny focus groups and interviews

The inspection team may conduct some 1:1 interviews with key people and facilitate a number of focus groups, with a range of staff and stakeholders across the partnership, including third and independent sector providers. These focus groups may include:

- Frontline practitioners
- Team managers/Service managers
- Third sector and private providers
- Senior managers
- Strategic leaders
- Commissioners and planners

Additional focus groups might be required depending on the emergent inspection findings. Where we may wish to arrange 1:1 interviews, this would be with a limited number of key individuals. These may include the chief officer, head of adult services and the service lead for learning disability but will reflect the local organisational structure. We ask the coordinator to start preparing the core focus groups and interview dates early in the inspection to ensure there is adequate time to organise these, and so that team around the person sessions can be slotted in around the focus groups.

The focus groups and interviews are a key element of how the inspection team will explore significant lines of inquiry that have emerged during the inspection. The focus groups and interviews will be held alongside the team around the person sessions, during **weeks 17 and 18** of the inspection.

As far as possible, focus groups and interviews should take place later in this fortnight to enable us to discuss any themes arising in the team around the person sessions. However, we understand that the practicalities of arranging both sets of sessions may mean that this is not always possible.

The inspection coordinator will need to identify and contact relevant staff and stakeholders in order to arrange the focus groups and interviews, and to confirm dates, times and who is attending. The timetable for these sessions needs to be uploaded by **midday on Friday of week 13**, with the final version of the timetable incorporating both scrutiny and team around the person sessions uploaded by noon on **Wednesday of week 16**.



## Partnership meetings

The Care Inspectorate and Healthcare Improvement Scotland are committed to engaging in dialogue with all relevant people in the HSCP throughout the process of the inspection. Regular partnership meetings, scheduled at agreed points during the inspection, assist in the two-way sharing of information between the inspection team and the HSCP. They also help to bring transparency to the inspection and provide opportunities to discuss high level emerging messages and themes while the inspection is underway. Guidance has been produced which sets out the function of each meeting and who should attend. Experience has shown that attendance by the right staff and leaders is more important than having large numbers of participants as it facilitates an effective collaborative discussion.

There are four partnership meetings, each planned to coincide with key points in the inspection process.

Meeting	Timing	Function
Partnership meeting 1 and coordinator's meeting	week 5	Introductions, preparation and planning.
Partnership meeting 2	week 14	Position statement discussion, emerging themes from engagement, staff survey, and scoping.
Partnership meeting 3	week 20	Sharing emerging findings
Partnership meeting 4	week 26	Discussion of report

The inspection coordinator will need to organise the meetings and ensure that key leaders from the partnership can attend.



## Report writing

Report writing begins with the inspection team reviewing and evaluating the evidence it has collected and identifying its key findings in terms of the quality indicators set out in the Quality Improvement Framework. It will also determine its evaluations for each indicator using our six-point evaluation scale. The inspection lead and deputy will then draft the inspection report. The draft report will then go through a quality assurance process with relevant managers within the Care Inspectorate and Healthcare Improvement Scotland, after which the report is discussed at partnership meeting 4 in **week 26**.



Notification



Identifying coordinator



Staff survey



Position statement & supporting evidence



Engagement



Selection of records to review



Reviewing records



Team around the person



Scrutiny focus groups

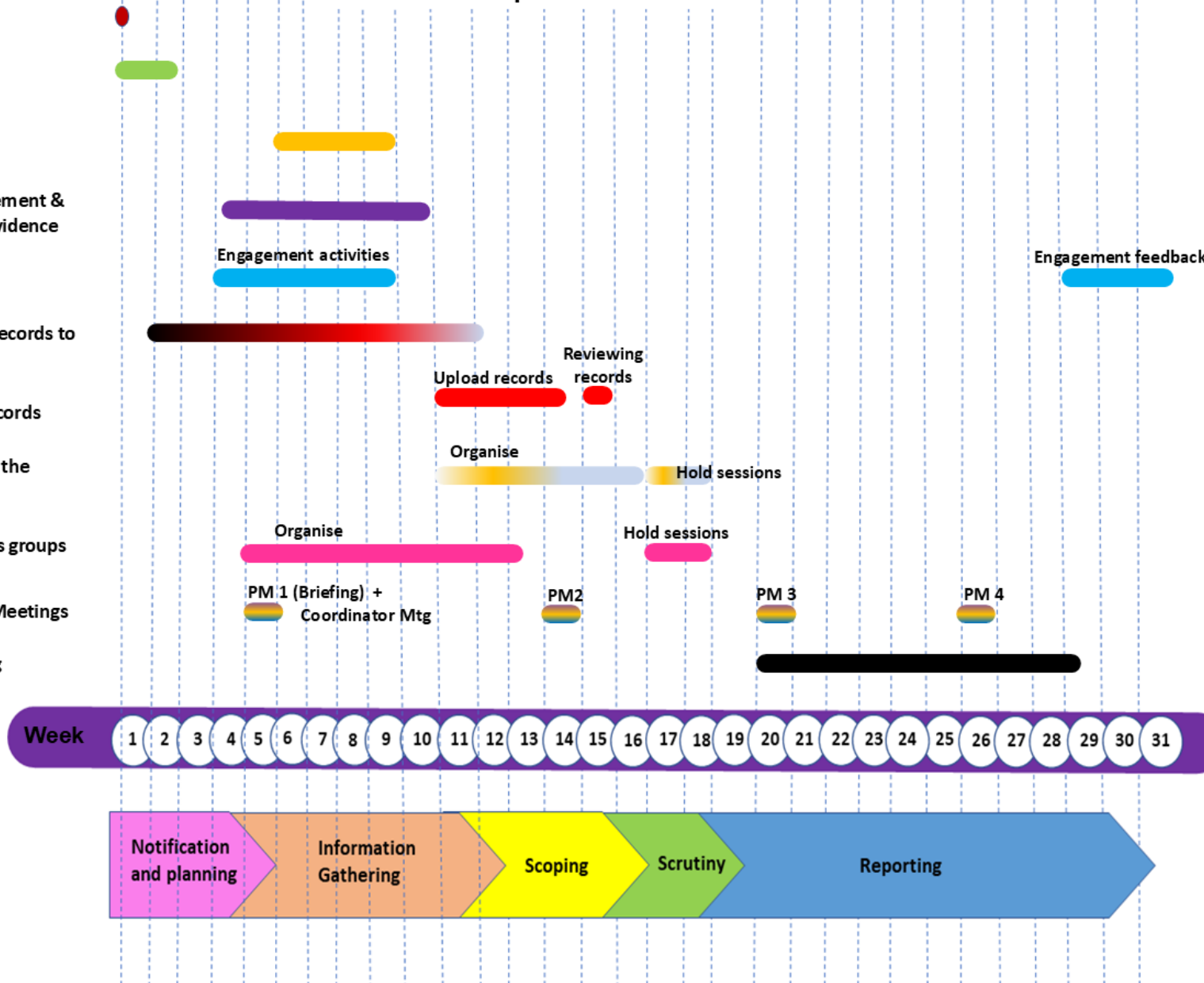


Partnership Meetings



Report Writing





## Overview – Inspection Process









## Week by Week Guide




For each week the guide describes:





- Events and activities which will take place in that week.
- Key actions for the HSCP to undertake that week, either to meet the deadline in that week or to prepare for things which need to be delivered in future weeks.

Weeks	
<div data-bbox="98 508 130 560">1</div> <div data-bbox="84 633 134 672"></div> <div data-bbox="75 1059 143 1124"></div> <div data-bbox="67 1444 153 1500"></div> <div data-bbox="54 1886 156 1960"></div>	<p><b>Events/activities this week:</b></p> <ul style="list-style-type: none"> <li>• <b>Notification</b> – On the <b>Monday of week 1</b>, the HSCP receives a letter from the Care Inspectorate and Healthcare Improvement Scotland giving formal notification of the start of the inspection. Letters are sent to: <ul style="list-style-type: none"> <li>○ Chief Officer of the HSCP</li> <li>○ Chief Executive of the Local Authority</li> <li>○ Chief Executive of the NHS Board</li> </ul> <p>Copied to:</p> <ul style="list-style-type: none"> <li>○ Chief Social Work Officer</li> <li>○ Chair of the IJB or equivalent</li> <li>○ NHS Liaison Coordinator</li> <li>○ Executive Nurse Director NHS</li> </ul> </li> </ul> <p><b>Key Actions for the HSCP</b></p> <ul style="list-style-type: none"> <li>• You should identify an inspection coordinator. Contact details for the inspection coordinator need to be confirmed to the inspection team no later than <b>Friday of week 2</b>. We ask that the coordinator is someone with a level of seniority who can access partnership resources, collaborate effectively with the inspection team and make key decisions. The coordinator will also be able to put us in touch with key staff, people and carers who will be able to support our engagement with people and unpaid carers. This <b>coordinator profile</b> provides more detail of the role to help you select the right person.</li> <li>• You may wish to inform stakeholders about our inspection as soon as possible. As part of our engagement with people and carers, we will be scoping services and groups operating in the partnership area. From week 3, the inspection team will begin contacting third and independent sector services and groups, and from week 4 statutory services and groups, which support people in your area. We will be asking them to assist us in contacting people and carers who would be willing to talk with us. To help us with this, please provide us with a list of the most significant services and groups in your area who work with or provide support to people with a learning disability. We ask for up to 20 of the most significant services, rather than all of them. The list may include services provided directly by the partnership, contracted services, voluntary and community organisations, peer support groups and carer and advocacy organisations. Please submit this on the <b>Provider and services template</b> by 5pm on <b>Thursday of week 3</b>.</li> </ul>







- You should make sure that relevant managers with responsibility for social care and health records are asked to consider what they need to do to begin preparing the record reading sample as soon as possible. The Pre-Inspection Return needs to be completed and returned to the inspection team by **12pm on Friday of week 6**. See **Review of records sampling guidance**


Week	
<b>2</b>  	<b>Events/activities this week:</b> <ul style="list-style-type: none"> <li>The inspection team continues to prepare for the engagement phase.</li> <li>The HSCP will confirm contact details for the inspection coordinator to the inspection team by <b>Friday of week 2</b>.</li> <li>Soon after the inspection team receives the inspection coordinator's contact details, the Strategic support officer (SSO) will email the inspection coordinator and the inspection lead will follow up with a telephone call/MS Teams meeting to introduce themselves.</li> </ul>
Week	
<b>3</b>  	<b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>The inspection coordinator should take time to read the partnership guide.</li> <li>The HSCP returns the <b>Provider and services template</b> by 5pm on <b>Thursday of this week</b>.</li> <li>The inspection team will begin to make contact with local third and independent sector services and groups with the aim of identifying people and unpaid carers who wish to participate in the inspection.</li> </ul>
Week	
<b>4</b>  	<b>Events/activities this week:</b> <ul style="list-style-type: none"> <li>The inspection team will make contact with local services and groups with the aim of identifying people and unpaid carers who wish to participate in the inspection.</li> </ul> <b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>The inspection coordinator will begin to identify participants and work with the inspection team's strategic support officer (SSO) to arrange the following meetings which take place in <b>week 5</b>: <ul style="list-style-type: none"> <li>Partnership Meeting 1 (Briefing) - this meeting provides an inspection overview. It allows key leaders in the HSCP to meet members of the inspection team and provides an opportunity for them to ask questions about the focus of the inspection and the inspection process <b>Partnership Meetings</b>.</li> </ul> </li> </ul>

  	<ul style="list-style-type: none"> <li>○ Coordinator's Meeting - this allows the inspection lead, depute inspection lead, engagement lead and strategic support officer (SSO) to meet with the inspection coordinator to go through the arrangements that need to be put in place for the inspection to run smoothly.</li> <li>• Partnership Meeting 1 and the coordinator's meeting are commonly held on the same day with the briefing meeting taking up the first part of the agenda and then the coordinator's meeting taking place after a short break.</li> <li>• The inspection coordinator should check that appropriate people within the HSCP are aware of the work that needs to be done to progress the review of records sample and that this work is beginning (<b>refer to Review of records sampling guidance</b>)</li> <li>• The inspection coordinator should start considering how to distribute the staff survey link to staff in <b>week 6</b>. The staff survey will need to be circulated to staff in partnership services which support people with a learning disability, including third sector and independent sector services.</li> </ul>
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Week	
<p><b>5</b></p>    	<p><b>Events/activities this week:</b></p> <ul style="list-style-type: none"> <li>• Partnership Meeting 1 (Briefing) - this meeting provides an inspection overview. It allows key leaders in the HSCP to meet members of the inspection team and provides an opportunity for them to ask questions about the focus of the inspection and the inspection process.</li> <li>• Coordinator's Meeting - this allows the inspection lead, depute inspection lead, engagement lead and strategic support officer (SSO) to meet with the inspection coordinator to go through the arrangements that need to be put in place for the inspection to run smoothly.</li> <li>• Partnership Meeting 1 and the coordinator's meeting are commonly held on the same day with the briefing meeting taking up the first part of the agenda and then the coordinator's meeting taking place after a short break.</li> <li>• The inspection team will also provide a link to the online staff survey in preparation for opening the survey to staff at the beginning of <b>week 6</b>.</li> <li>• The inspection team will continue to have conversations with local services and groups with the aim of identifying people and carers who wish to participate.</li> </ul> <p><b>Key Actions for the HSCP</b></p> <p>The inspection coordinator should:</p> <ul style="list-style-type: none"> <li>• Continue working on how to distribute the staff survey link to staff in <b>week 6</b>. The staff survey will need to be circulated to partnership services which support</li> </ul>



















     	<p><b>Key Actions for the HSCP</b></p> <ul style="list-style-type: none"> <li>• The inspection coordinator emails the staff survey link to relevant health and social staff as soon as possible.</li> <li>• The inspection coordinator updates the inspection team strategic support officer (SSO) as to the number of staff who have been sent the link in order to allow the return rate to be monitored.</li> <li>• The completed Pre-Inspection Return (PIR) is uploaded to the secure data sharing platform by <b>12 noon on Friday</b>.</li> <li>• The inspection coordinator begins identifying participants and times for partnership meetings. <ul style="list-style-type: none"> <li>○ Partnership meeting 2 - <b>Thursday week 14</b></li> <li>○ Partnership meeting 3 - <b>Wednesday week 20</b></li> <li>○ Partnership meeting 4 – <b>Wednesday week 26</b></li> </ul> </li> <li>• The inspection coordinator continues: <ul style="list-style-type: none"> <li>○ Preparing the position statement and supporting evidence.</li> <li>○ Making arrangements for the HSCP to prepare (and if required, upload) records to be reviewed by the inspection team.</li> <li>○ Identifying participants and making arrangements for the scrutiny focus groups.</li> </ul> </li> </ul>
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Week	
<p><b>7</b></p> 	<p><b>Events/activities this week</b></p> <ul style="list-style-type: none"> <li>• People and carer questionnaires are open for people and carers to complete until the end of <b>week 10</b>.</li> <li>• Inspection team provides telephone support for the people and carer questionnaires on 0131 623 4614:  Monday and Wednesday: 2 – 4pm Tuesday and Friday: 10am – 12pm Thursday: 4 – 6pm</li> <li>• Inspection team agrees timetable for engagement conversations and focus groups with local services and groups.</li> <li>• Potential early engagement conversations with people and carers (remote).</li> </ul>







     	<ul style="list-style-type: none"> <li>• Inspection team selects the initial random sample of people whose records will be reviewed from those identified on the Pre-Inspection Return (<b>refer to Review of records sampling guidance</b>)</li> </ul> <p><b>Key Actions for the HSCP</b></p> <ul style="list-style-type: none"> <li>• The inspection coordinator continues: <ul style="list-style-type: none"> <li>○ Preparing the position statement and supporting evidence.</li> <li>○ Making arrangements for the HSCP to prepare (and if required, upload) records to be reviewed by the inspection team.</li> <li>○ Identifying participants and making arrangements for the scrutiny focus groups</li> <li>○ Working to confirm arrangements and participants for partnership meetings 2,3 and 4.</li> </ul> </li> </ul>
<b>Week</b>	
<p><b>8</b></p>                  	<p><b>Events/activities this week</b></p> <ul style="list-style-type: none"> <li>• Engagement questionnaire remains open.</li> <li>• Inspection team continues to provide telephone support for engagement questionnaire on 0131 623 4614:   Monday and Wednesday: 2 – 4pm  Tuesday and Friday: 10am – 12pm  Thursday: 4 – 6pm</li> <li>• Engagement conversations and focus groups take place with the support of local services and groups.</li> <li>• The inspection team will upload the <b>Initial Case Tracker</b> spreadsheet to the secure data sharing platform for the HSCP to access by <b>5pm on Monday this week</b>. This identifies the people selected randomly for the record reading sample to allow the HSCP to cross-reference and provide information on unpaid carer support and health inputs. (<b>Review of records sampling guidance</b>).</li> </ul> <p><b>Key Actions for the HSCP</b></p> <ul style="list-style-type: none"> <li>• The HSCP will immediately begin completing the initial case tracker spreadsheet to provide information on unpaid carers and health inputs for people selected in the random sample. The completed initial case tracker template needs to be completed and uploaded to the secure data sharing platform by <b>midday on Friday of week 10</b>.</li> <li>• The inspection coordinator continues: <ul style="list-style-type: none"> <li>○ Preparing the position statement and supporting evidence.</li> <li>○ Planning how the partnership will prepare (and if required, upload) records to be read remotely or onsite by the inspection team.</li> <li>○ Identifying participants and making arrangements for the scrutiny focus groups</li> </ul> </li> </ul>








	<ul style="list-style-type: none"> <li>Working to confirm arrangements and participants for partnership meetings 2,3 and 4.</li> </ul>
Week	
<p><b>9</b></p>      	<p><b>Events/activities this week</b></p> <ul style="list-style-type: none"> <li>Staff survey closes (Friday).</li> <li>Engagement questionnaires remain open.</li> <li>Inspection team continues to provide telephone support for engagement questionnaires:  Monday and Wednesday: 2 – 4pm Tuesday and Friday: 10am – 12pm Thursday: 4 – 6pm</li> <li>Engagement conversations and focus groups take place with the support of local services and groups.</li> <li>If the inspection team feel they would like to speak to further people and carers identified on the Pre-Inspection Return (PIR), they will raise this for discussion with the partnership this week.</li> </ul> <p><b>Key Actions for the HSCP</b></p> <ul style="list-style-type: none"> <li>HSCP continues to complete the initial case tracker to provide health inputs for people in the initial random sample. This needs to be completed and uploaded to the secure data sharing platform by <b>midday on Friday week 10</b>.</li> <li>The inspection coordinator reviews progress on the position statement and supporting evidence: and arrangements to prepare (and if required, upload) records to be reviewed by the inspection team. These need to be completed in <b>week 11</b> (position statement) and <b>week 14</b> (records).</li> <li>The inspection coordinator continues: <ul style="list-style-type: none"> <li>Identifying participants and making arrangements for the scrutiny focus groups. The SSO will supply a timetable template which the HSCP will populate.</li> <li>Working with the inspection team's Strategic Support Officer (SSO) to confirm arrangements and participants for partnership meetings 2,3 and 4.</li> </ul> </li> </ul>
Week	
<p><b>10</b></p> 	<p><b>Events/activities this week</b></p> <ul style="list-style-type: none"> <li>Engagement questionnaires close (Friday).</li> <li>Inspection team continues to provide telephone support for engagement until questionnaires close:</li> </ul>






   	<p>Monday and Wednesday: 2 – 4pm Tuesday and Friday: 10am – 12pm Thursday: 4 – 6pm</p> <ul style="list-style-type: none"> <li>Engagement conversations and focus groups (mop up if required).</li> </ul> <p><b>Key Actions for the HSCP</b></p> <ul style="list-style-type: none"> <li>HSCP uploads completed <b>Initial Case Tracker</b> to the secure data sharing platform by <b>midday on Friday</b>. (refer to <b>Review of records sampling guidance</b>).</li> <li>Inspection coordinator checks that position statement and supporting evidence will be ready to upload by noon on <b>Monday week 11</b>.</li> <li>The inspection coordinator continues: <ul style="list-style-type: none"> <li>Identifying participants and making arrangements for the scrutiny focus groups.</li> <li>Working to confirm arrangements and participants for partnership meetings 2,3 and 4.</li> </ul> </li> </ul>
<b>Week</b>	
<b>11</b>    	<p><b>Events/activities this week</b></p> <ul style="list-style-type: none"> <li>Inspection team uploads the <b>Final Case Tracker</b> to the secure data sharing platform by <b>5pm on Monday</b> to confirm people in the main and reserve samples. If additional resampling is needed because the initial random sample did not identify people with both health and social care needs, the inspection team will request the minimum amount of resampling required to produce effective main and reserve samples.</li> <li>Inspection team will also upload individuals who have been selected in advance for the ‘team around the person’ process to enable the partnership to begin preparations for the sessions with these people, their carers and the staff who have supported them in weeks <b>17 and 18</b> (refer to the <b>TATP coordinator guidance</b> and the <b>TATP scrutiny timetable</b>)</li> </ul> <p><b>Key Actions for the HSCP</b></p> <ul style="list-style-type: none"> <li>From Tuesday HSCP begins preparing records for people identified on the final case tracker as part of the main or reserve samples. If resampling is necessary additional people will be added to the final case tracker as they are identified. If the review of records is to be carried out remotely, uploading of records needs to be completed by <b>midday on Wed week 14</b>. If inspectors are to have direct access to the partnership’s recording systems, arrangements must be in place for this access to be available by 9am on <b>Thursday of week 14</b>. Any paper records should be available to the inspectors for 8am on <b>Monday of week 15</b>.</li> <li>The HSCP should review the sample and the people selected for the ‘team around the person’ exercise and confirm they are appropriate <b>by midday on Friday this week</b></li> </ul>





   	<ul style="list-style-type: none"> <li>HSCP uploads its completed position statement and supporting evidence to Care Inspectorate secure SharePoint site <b>by midday on Monday this week</b></li> <li>HSCP confirms participants and arrangements for partnership meetings</li> <li>The inspection coordinator reviews progress on arrangements for the scrutiny and partnership meetings to ensure that it can confirm scrutiny focus groups timetable by <b>midday, Friday week 13.</b></li> <li>The inspection coordinator begins to arrange the staff MDT sessions for the 'team around the person' sessions, with a draft timetable to be ready by <b>midday, Friday week 13. (refer to the TATP scrutiny timetable)</b></li> </ul>
<b>Week</b>	
<b>12</b>    	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>If resampling has been required, the inspection team will confirm when the final case tracker has been uploaded to the secure data sharing platform by <b>midday on Monday</b></li> </ul> <b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>The inspection coordinator continues to finalise participants for scrutiny focus groups (<b>refer to Scrutiny focus groups</b>).</li> <li>HSCP continues preparing (and if required, uploading) records for people identified on the final case tracker as part of the main or reserve samples.</li> <li>The inspection coordinator begins to arrange the staff MDT sessions for the 'team around the person' sessions, with a draft timetable to be ready by <b>12 noon, Friday week 13.</b></li> </ul>
<b>Week</b>	
<b>13</b>  	<b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>The inspection coordinator uploads the timetable (names, designations and email addresses) for scrutiny focus groups and draft timetable for 'team around the person' MDT sessions to the inspection team by <b>12 noon on Friday (TATP scrutiny timetable).</b></li> <li>HSCP continues preparing (and if required, uploading) records for people identified on the final case tracker as part of the main or reserve samples.</li> </ul>
<b>Week</b>	
<b>14</b>  	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>Partnership meeting 2 (Thurs).</li> <li>The inspection team issues invites for scrutiny focus groups.</li> </ul>









	<p><b>Key Actions for the HSCP</b></p> <ul style="list-style-type: none"> <li>• The HSCP completes preparation of records for people identified on the final case tracker. Files requiring to be uploaded should be completed by <b>midday on Wednesday this week</b>. If inspectors are to have direct access to the partnership's recording systems, this needs to be in place for all inspectors by <b>9am on Thursday this week</b>. Arrangements must be in place for any paper records to be reviewed on site to be delivered and signed over by the coordinator to the inspection team by <b>8am on Monday week 15</b>.</li> <li>• <b>Thursday morning</b> – partnership provides training to inspection team in using their electronic systems.</li> <li>• The HSCP confirms contact details of social work and health staff to support review of records process by <b>midday on Wednesday this week</b>.</li> </ul>
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Week	
<p><b>15</b></p>     	<p><b>Events/activities this week</b></p> <ul style="list-style-type: none"> <li>• The inspection team reviews people's records (<b>Monday-Wednesday</b>).</li> <li>• The template and guidance we use for reviewing records can be found on the Care Inspectorate website, following the provided link and titled 'Record review template and guidance'</li> <li>• Any paper records to be reviewed onsite are delivered to the agreed record reading venue by <b>8am on Monday morning</b>.</li> <li>• HSCP ensures identified social work and health staff are available to answer any questions the inspection team has about records.</li> <li>• While reviewing records the inspection team will review the people who have been identified previously in week 11 for the team around the person process and inform the HSCP of any changes by <b>2pm on Thursday</b>.</li> </ul> <p><b>Key Actions for the HSCP</b></p> <ul style="list-style-type: none"> <li>• From <b>Thursday</b> this week to <b>Wednesday week 16</b>, the inspection coordinator will work with the strategic support officer to finalise arrangements for 'team around the person' sessions with people, their unpaid carers and the staff teams who support them. 'Team around the person' sessions will take place in <b>weeks 17 and 18</b>.</li> </ul>

Week	
<b>16</b>	<b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>• Inspection Coordinator uploads the final version of the timetable with details of the scrutiny focus groups and 'Team around the person' sessions by <b>midday on Wednesday of this week.</b></li> </ul>
Week	
<b>17</b>  	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>• 'Team around the person' sessions.</li> <li>• Scrutiny focus groups.</li> </ul> <b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>• The inspection coordinator supports the successful delivery of 'team around the person' sessions and scrutiny sessions.</li> </ul>
Week	
<b>18</b>  	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>• Team around the person sessions continue.</li> <li>• Scrutiny focus groups continue.</li> </ul> <b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>• The inspection coordinator supports the successful delivery of 'team around the person' sessions and scrutiny sessions</li> </ul>
Week	
<b>19</b> 	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>• Inspection team analyses evidence.</li> <li>• Inspection team begins to develop its evaluations for each quality indicator using the 6 point evaluation scale. See <b>Evaluation Criteria.</b></li> </ul>
Week	
<b>20</b>  	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>• Develop draft report.</li> <li>• Partnership meeting 3 (Wednesday).</li> </ul>

Week	
<b>21</b> 	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>Develop draft report.</li> </ul>
Week	
<b>22</b> 	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>Care Inspectorate/Healthcare Improvement Scotland quality assurance of inspection report.</li> </ul>
Week	
<b>23</b> 	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>Care Inspectorate/Healthcare Improvement Scotland quality assurance of inspection report.</li> </ul>
Week	
<b>24</b> 	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>Care Inspectorate/Healthcare Improvement Scotland quality assurance of inspection report.</li> </ul>
Week	
<b>25</b> 	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>Care Inspectorate/Healthcare Improvement Scotland quality assurance of inspection report.</li> </ul>

Week	
<b>26</b>   	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>Report shared with partnership for factual accuracy (<b>Monday</b>).</li> <li>Partnership meeting 4 (<b>Wednesday</b>).</li> </ul> <b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>HSCP returns draft report highlighting any factual inaccuracies (by <b>Friday, 5pm</b>).</li> </ul>
Week	
<b>27</b> 	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>Final report produced.</li> </ul>

Week	
<b>28</b> 	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>• Embargoed final report (Tuesday)</li> </ul>
Week	
<b>29</b>  	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>• Final report published (Tuesday).</li> <li>• Inspection team arrange to provide feedback to people experiencing care who spoke with us during the inspection. Process of feeding back may run into weeks 30 and 31.</li> <li>• HSCP has six weeks to return improvement plan.</li> </ul>
Week	
<b>30</b> 	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>• Inspection team continue providing feedback to people and unpaid carers who spoke with us during the inspection.</li> </ul>
Week	
<b>31</b>  	<b>Events/activities this week</b> <ul style="list-style-type: none"> <li>• Inspection team may continue providing feedback to people and unpaid carers who spoke with us during the inspection.</li> <li>• Request for improvement plan by Wednesday week 35</li> <li>• Post inspection questionnaire issued (HSCP has 2 weeks to complete and return).</li> </ul>
Week	
<b>33</b> 	<b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>• HSCP returns post inspection questionnaire (Tuesday)</li> </ul>
Week	
<b>35</b> 	<b>Key Actions for the HSCP</b> <ul style="list-style-type: none"> <li>• HSCP returns improvement plan (Wednesday)</li> </ul>