

Orbit360 SMC process video transcript

- 00:00 Supporting Medical Colleague (SMC) role
There is no audio on this video
- 00:09 The role of the Supporting Medical Colleague (SMC) in the process is to help the doctor reflect on their feedback – both positive and negative.
As the SMC you will:
-Verify the list of colleagues that the doctor has selected, you should ensure that the list represents colleagues from across the doctor's whole practice
-Review the doctor's report
-Provide feedback to the doctor on the report
-Release the report to the doctor
There is no obligation to accept the request, you can decline to be an SMC by following the link in the email notification.
- 00:44 Once selected as a Supporting Medical Colleague (SMC) you will receive an email notification. If you have an Orbit360 account, you can use your existing credentials (as long as the doctor has entered the email address associated with your current Orbit360 account), otherwise you need to create a new account by setting a password following the link in the email notification. If you have been selected as an SMC using a different email to your original account, you can request that these profiles are 'merged' – further guidance around this can be found on our FAQ page.
- 01:11 This short video will show you the SMC process in Orbit360 if you are an SMC when a doctor has initiated both patient and colleague feedback (using the Chrome browser).
- 01:30 Once logged into the Orbit360 system, you will need to go to your 'SMC actions' tab.
- 01:43 From here, you will need to review the SMC request via the 'Action' button.
- 01:54 You will need to accept/decline the SMC request. The comment box is not mandatory, but we do recommend you add a comment if you have declined the request.
- 02:21 You can see that the request has been accepted.
- 02:28 The doctor will need to enter a colleague list.
If they have done this prior to you accepting the SMC request, a button to action this will appear under the 'Colleague list' heading. Otherwise you will receive a notification when this is submitted and available to review after accepting the SMC request.
- 02:45 You can review the colleague list via the 'Action' button.
You should ensure the doctor's colleague list represents colleagues from across the doctor's whole practice before approving their list.
Once you have approved the list, Orbit360 will automatically send the questionnaire to the nominated colleagues.
- 03:13 If you are happy with the list you will need to select 'Approve' next to every name and then select 'Submit Responses'.
If you are not happy with the list and want to decline any names then approve the ones you want and select decline for the others. You will need to add a comment at the bottom explaining why you declined some names. Select 'Submit Responses' and this will send the list back to the doctor. They will also receive an email which will show the comment you added.
The doctor will then review, amend/enter new colleagues and then re-submit to you. Any names that were declined will be removed from their list.
- 04:05 Here you can see the Dr is reviewing the list again.
- 04:16 You will then need to approve the list again and once approved with 15 or more colleagues, Orbit360 will automatically send the questionnaire to the nominated colleagues.
- 04:28 Here you can see the doctor has entered new colleagues for you to approve.
- 04:49 Here you can see that the doctor has not yet downloaded the patient forms so the 'patient responses' progress bar does not appear.

- 05:00 You can monitor the progress at any time and looking at the progress bars now, you can see the doctor has downloaded their patient forms and begun to obtain both patient and colleague feedback.
- 05:10 You can see that the doctor has not met their threshold yet.
- 05:20 Here you can see the thresholds have now been met but the doctor has not released their report to you yet.
- 05:30 The report will become available to you if it has met one of these conditions:
- The doctor has met their thresholds and the closing date has passed
 - The doctor has decided to release their report 'early'. In this scenario the doctor will have met the thresholds and is happy to release straight away, rather than wait for their closing date.
- 05:47 Here you can see the progress bars are complete – the doctor has obtained the minimum responses required for both patient and colleague feedback and have reached their closing date or requested the early release of their report. They will no longer be able to collect further responses.
- 06:08 You can view the feedback by clicking the 'Action' button underneath the 'Review feedback' column – this will open a webpage containing the report with the doctor's feedback (depending on your computer/laptop).
- 06:25 You should examine the feedback and decide whether:
- This is universally good feedback
 - There are minor areas that may indicate developmental needs
 - There are many areas where the feedback is less than good
 - There are one or more areas that may surprise or upset the doctor
 - There are one or more comments that are personal, rude or defamatory
- 07:18 Within the report you will see the collated data. It also shows you graphs that display the average responses and allows you to compare these against 'All Wales'.
- 07:32 You can also download the report – this will open a PDF version of the report.
- 07:40 Once you are happy that the report can be released to the doctor, use the 'release' button. Following this, this doctor will be able to download their report from the 'Completed Reports' page on their Orbit360 account.
- 08:16 You have to tick the 'Declaration' box to confirm you are happy to release the report to the doctor and that it doesn't contain anything inappropriate.
Should you have any concerns, please contact the Orbit360 team prior to releasing the report to the doctor.
- 08:36 Concerns in the feedback could include comments that are personal, rude or defamatory. Remember that some doctors are upset if they do not score in the top category for everything and may be offended or upset that they are not seen as perfect.
- 08:55 The feedback may be released to the doctor after a brief conversation offering to discuss the feedback - this conversation should focus on the doctor's perception of the feedback and what, if any, development/changes need to be made. We do recommend that feedback is reflected upon as a whole, rather than focusing on individual responses. Remind the doctor to record their reflections in the appropriate section of their MARS account.
- 09:22 Once you release the report, the doctor moves to your 'SMC History' tab.
- 09:31 In your 'SMC History' tab you will see any doctors you have acted as an SMC for previously, but you will not be able to access the report once complete.
- 09:41 Additionally, if at any time during the process a doctor you support is 'paused', they will appear in your 'SMC paused list'. You will be unable to action anything while the doctor's surveys are paused.
- 09:53 When reactivated, the doctor's feedback will resume and they will appear on your SMC list again so you can continue with supporting the colleague/patient feedback process.

- 10:08 If you have accepted a request to act as a Supporting Medical Colleague (SMC) but you can no longer continue with this role, you should contact the Orbit360 team. We will then support the doctor in continuing the process with an alternative SMC.
There could be an instance where you have a duplicate account as you have set up a profile in Orbit360 but then are selected as an SMC by a doctor using a different email address. These profiles can be 'merged' into one account (unless you wanted to keep them separate from each other). Further information on merging profiles is found on our FAQ page.
- 10:42 If you have any questions about the Supporting Medical Colleague (SMC) role, please get in touch with your Designated Body or the Orbit360 team via email: HEIW.Orbit360@wales.nhs.uk
For a full list of FAQs please visit www.orbit360faq.heiw.wales and choose 'Supporting Medical Colleague'.
Created by the Revalidation Support Unit, Health Education and Improvement Wales.