RCPCH Invited Reviews

Supporting improvement in child health

Information and Guidance

For coordination by the healthcare organisation of the invited review

August 2025

RCPCH
Royal College of
Paediatrics and Child Health
Leading the way in Children's Health

Contents

1. Introduction

1.1.   This booklet provides information on the Royal College of Paediatrics and Child Health Invited Reviews Programme for the staff nominated by the Healthcare Organisation commissioning the invited review ('HCO') to work with the RCPCH Invited Reviews Service ('IRS') staff in the coordination of a forthcoming invited review.

Glossary of terms and acronyms

Term in Full	Acronym / abbreviation	Notes
Royal College of Paediatrics and Child Health	RCPCH	The organisation being commissioned by the requesting healthcare organisation to undertake the invited review.
Invited reviews programme	IRP	The programme offered by RCPCH
Invited Reviews Service	IRS	The service provided by RCPCH staff.
Healthcare organisation	HCO	The organisation which submits the enquiry or request to RCPCH to undertake an invited review. It is also referred to as 'the Client' in the contract and costings information.

1.2.   The RCPCH IRS staff will request a meeting with you as the coordinator nominated by your HCO to run through this booklet and provide an opportunity for you to ask any questions. The IRS staff are available throughout the duration of the review planning process to provide support.

> Note. That a lead in time to the review visit of approximately 10 weeks is required for the planning and preparation, both for the RCPCH and your HCO.

1.3.   The IRS staff cannot discuss anything relating to the reviews' Terms of Reference with you and would only discuss matters relating to these if you are included in the list of interviewees during your allocated interview.

1.4.   You can find more details about the background to and aims of the Invited Review programme and its processes on our website (www.rcpch.ac.uk/invitedreviews), including the '*Process and Guidance Handbook for Healthcare Organisations*'.

1.5.   For any queries about this document or any aspect of the RCPCH IRP, please contact: invited.reviews@rcpch.ac.uk. If you have any concerns about the service you have received from the RCPCH IRS, in the first instance, please contact invited.reviews@rcpch.ac.uk, explaining why you are unhappy and what action is

needed. Alternatively, or, if you are still dissatisfied, please refer to the RCPCH complaints procedure, the details for which are found at; www.rcpch.ac.uk/contact-us/complaints.

2. The role of the HCO coordinator for the invited review

2.1   Your role as your HCO coordinator relates to three broad areas:

(i)   Overseeing and coordinating the review. Please refer to sections [3, 6](#), [7](#) & [8](#)

(ii)   Providing the background information to be shared by your HCO for the invited review. Please refer to [section 4](#)

(iii)   Coordinating the timetable for the invited review visit. Please refer to [section 5](#)

2.2   You can track the progress of actions required using a planning checklist which the RCPCH IRS staff will provide.

2.3   RCPCH uses SharePoint[1] as its primary secure collaboration tool for sharing and communicating confidential information with external stakeholders and keeping track of the content, versions, and access. The RCPCH IRS staff will provide you with details of the dedicated SharePoint site for this invited review. [Section 3](#) below includes information and guidance on using the SharePoint site for the invited review.

3. Using SharePoint for the invited review

3.1   You will receive an email from the RCPCH IRS staff inviting you to a SharePoint folder(s) for the invited review your HCO has commissioned.

(i)   Clicking 'open' will take you to a sign in screen in your default browser.

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[1]   SharePoint uses the Office 365 cloud which is ISO 27001 certified (highest security standard) and has servers located in the EU, complying with Chapter V of the GDPR. Users require a password and username to log in to the site, making it compliant with UK data protection GDPR legislation (in that it allows the secure and safe transfer of personal and sensitive data.
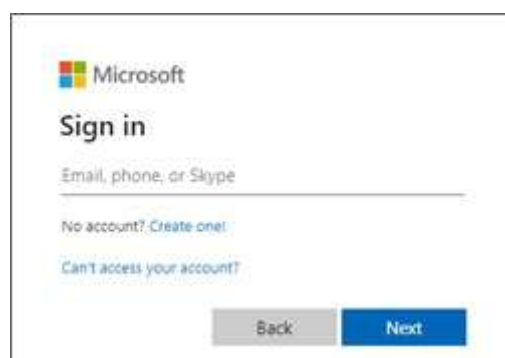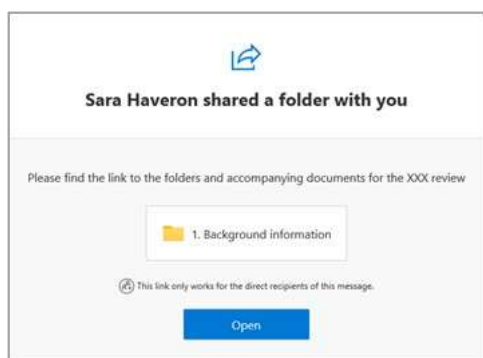
(ii)   You will likely be using an NHS or your organisation's email address, which may already be linked to a Microsoft account - simply log in using this email address and click 'Next'.

(iii)   You may receive a code to your email address to input on the next screen to log on to your SharePoint folder(s).

(iv)   Once logged in, you will see the folder(s) and files, which you will need access to for the review as set out in the table below.

> Note. Not all the documents referred to in the table will be available the first time you log on; the RCPCH IRS staff will upload documents as they become relevant at each stage of the coordination and planning process.

Folder title	Contents	Confidential Yes / No	Default access permissions of HCO staff
RCPCH Invited Reviews Programme Information & Guidance	RCPCH Invited Reviews Handbook for Healthcare Organisations	No	Coordinator and other staff
	Information for participants & interviewees in a RCPCH invited review		
	Information and Guidance for coordination by the healthcare organisation of the invited review (this document)		
Invited Review se- up	Invited Review Proposal	yes	Medical Director/Chief Medical Officer and/or staff nominated by them
	Copy of invited review request proforma submitted by HCO to RCPCH		

Folder title	Contents	Confidential Yes / No	Default access permissions of HCO staff
	New Customer form	yes	Coordinator & Medical Director/Chief Medical Officer (and/or staff nominated by them)
	Checklist for HCO coordination of the invited review	no	
	Invited Review details	yes	
	Details of the RCPCH invited review team	yes	
Review planning	Terms of Reference	yes	Medical Director/Chief Medical Officer and/or staff nominated by them
	Invited Review Timetable- for HCO to populate	yes	Coordinator & Medical Director/Chief Medical Officer (and/or staff nominated by them)
Supporting information to be provided by HCO	All documents which the HCO provides in advance of the invited review are uploaded into this folder- see section 4 for details	yes	Coordinator & Medical Director/Chief Medical Officer (and/or staff nominated by them)
Documents from HCO after the invited review	Any documents referred to during the invited review will be uploaded by the HCO not this folder	yes	Coordinator & Medical Director/Chief Medical Officer (and/or staff nominated by them)

4. Providing background information for the invited review

4.1. Collating the relevant information

4.1.1   Your Medical Director/Chief Medical Officer or person nominated by them should provide clinical oversight and responsibility and work with you regarding what information to provide in support of the invited review.

4.1.2   The information to be provided may include elements of self-assessment regarding how the service is provided, collation of relevant information and summaries, and information requested by the RCPCH invited review team. It may also, where agreed with your Medical Director/Chief Medical Officer (or person nominated by them) include information put forward by your HCO staff and other participating in the invited review ('interviewees').

> Note. Interviewees should not provide information directly to the Invited Reviews Service or the review team. Your HCO should inform them of the mechanism it has set up to enable them to provide this, which you can subsequently upload to the dedicated SharePoint site in the same way as all the information to be provided for the invited review (see 3.3 below).

4.1.3   Your HCO is expected to make staff participating in the invited review aware of the relevant information it has shared for the invited review, and it is recommended that your HCO holds a copy centrally. This will help facilitate any requests from interviewees/relevant staff in your HCO to examine it, which you should discuss with. your Medical Director/Chief Medical Officer or person nominated by them for agreement, and clarification of responsibilities and process.

4.2. How to share the background information with the RCPCH IRS

4.2.1   You should upload the background documentation which has been agreed with your Medical Director/Chief Medical Officer or person nominated by them to the SharePoint site dedicated to this review. The documentation should be uploaded in named sub-folders to facilitate navigation.

(i)   We recommend that you upload documentation to the SharePoint site as soon it is ready– there is no need to upload all the information at the same time.

(ii)   All background documentation should be uploaded no later than four weeks before the first day of the review visit.

Please see section 3 above for information on using SharePoint for the invited review and Appendix A for information on uploading documentation to SharePoint, if you are unfamiliar with the process.

Please do not send any documentation by email to the RCPCH IRS or review team members. Please refer to Appendix B for information on IT issues and, if discuss any technical difficulties you encounter with the SharePoint site with IRS staff.

4.2.2   Naming conventions for uploading files to the 'Supporting information provided by HCO' folder:

(i)   File names should make it clear, when the document was created. what it is and the status (Date – Subject – Document status). Please try to avoid:

> Terms like 'general' and 'misc', and make sure that the name is explanatory but concise.
> Including initials, abbreviation or any code that would not be obvious to other users, where possible.
> Using special characters such as ! ? % * $ £ & as these may cause problems when searching for a document – these can also cause problems if not recognised by software. Full stops and commas should not be used within the title.

(ii)   When including a number in a file name always give it as a two-digit number (e.g., 01, 02, 03). This will help you to sort files in order when sorting by name in SharePoint.

(iii)   When uploading to the SharePoint site, please note that any spaces within titles are represented by '%20' when they are converted to a URL, making the file path harder to read. Using an underscore or capitalise the first letter of each word instead should avoid this.

4.2.3   Documentation may be referred to during the review visit which was not uploaded in advance. If this arises, the RCPCH IRS staff or your Medical Director/Chief Medical Officer (or person nominated by them) will advise you. The deadline for uploading documentation after the review visit is five working days.

4.2.4   You should ensure that all documentation uploaded to SharePoint is anonymised where possible. Your HCO should take account of its legal responsibilities towards the confidentiality of patients and staff and consider all relevant legal advice and statutory duties, including its requirements in respect of its Caldicott Guardian. These responsibilities are detailed in sections 4.8.5 (ii) and 4.8.6 of the RCPCH '*Process and Guidance Handbook for Healthcare Organisations*'. All documentation received by the RCPCH, for the purposes of the invited review, is taken to be compliant with the healthcare organisation's obligations outlined in this handbook.

4.3. Review of clinical notes

4.3.1   This may be undertaken by the RCPCH Invited Review Team as a standalone clinical record invited review or as part of a service review.

4.3.2   The review team will need access to the clinical records pertaining to the episodes of care which are to be reviewed, which may include imaging, drug charts and MDT/M&M minutes where these patients were discussed. Your Medical Director/Chief Medical Officer or person nominated by them should provide guidance and oversight.

4.3.3   For onsite reviews, any paper notes should be available in the room to be provided. If there are electronic notes, it is recommended that a HCO member of staff is available for the duration to ensure the review team can access these.

4.3.4   If it is agreed between RCPXH and your HCO that the clinical records are to be shared with the review team electronically rather than being made accessible on site, discussions will take place regarding how this information can be shared securely

5.   Coordinating the timetable for the invited review visit

5.1.   Preparing the timetable

5.1.1.   The template for you to use will be available on the SharePoint site and the RCPCH IRS staff will liaise with you regarding start and finish times once travel arrangements are made and to accommodate any interviews to be undertaken remotely via MS Teams.

Please refer to [Appendix C](#) for information on opening and editing the timetable

5.1.2.   Your Medical Director/Chief Medical officer (or person nominated by them) will work with you regarding who is to be invited to participate in the invited review through interviews. Once you have the list of interviewees, it is recommended that you contact them for availability at the earliest opportunity and start to populate the timetable template. Appendix 4 of the '*Process and Guidance Handbook for Healthcare Organisations*', includes a list of potential interviewees.

5.1.3.   Please note the following regarding the order of the timetable and timings:

(i)   The first session should be timetabled as the introductory session with the Medical Director/Chief Medical Officer and those invited by them.

(ii)   The final session is scheduled for the review team to provide feedback to the Chief Executive, Medical/Nursing Director and any individuals invited by them. A 45-minute slot is scheduled after the final interview and just before this session

for review team private discussion.

(iii) The order of interviewees does not matter for the purposes of the invited review; it is recommended that this is based on interviewee availability and circumstances. It may be possible for an alternative date to accommodate any interviewees who are unavailable during the review visit. This will depend on the availability of the review team; Please speak to the IRS staff.

(iv) Interviews can be individual, pairs or small groups- Please check with interviewees which is their preference and accommodate all requests for individual interviews. Individual interviews are normally allocated 30-minute slots and 45 minutes for pairs/group interviews.

(v) Allow 10 minutes between interview slots for the review team to debrief, prepare for the next interview and take comfort breaks. Breaks for lunch and refreshments are also built in.

(vi) Build into the timetable a short tour of the relevant facilities for the review team, which must be accompanied by appropriate member(s) of staff.

(vii) If the review visit is to include on-site presence across more than one site, please allow sufficient time for the review team to travel between locations.

(viii) The feedback session must be scheduled after all the interviews. Additionally, after the final interview and before the feedback session, a minimum of one hour must be built in to give the review team time to prepare the feedback.

5.2. Facilities for the interviews

(i) A room should be made available for the interviews to take place, large enough to accommodate the review team and interviewees. Please ensure that:

   ➢ It has Wifi connection

   ➢ Water is made available for interviewees and the review team.

(ii) A waiting area is required for interviewees prior to their interview. Please leave a copy of the Terms of Reference for the review here and clearly mark it 'not to be removed.'

(iii) For any interviews which are to be conducted remotely (see 5.3 below), you may also need to book a room on the site from where interviewees are to join their remote interviews.

5.3. Interviews to be conducted remotely

(i) For any interviews which are to be conducted remotely, online MS Teams videoconferencing is used. For these interviews, you will need to create a separate MS Teams meeting for each interview, send it to the interviewees concerned as a calendar invite. Also write by email confirming the date and time of the interview (and location if you have booked a room), include the MS Teams

link and phone dial in details. You can also include in the email (if not already done so) the information outlined below in section 6.

> Note. To protect confidentiality, it is recommended that you do not provide each interviewee with the complete timetable or any of the MS Teams links other than that for their own interview slot.

(ii)   Do not send the calendar invite to the RCPCH IRS staff; instead, copy and paste the MS Teams link into the timetable next to the relevant interview slot.

(iii)   You will not be needed to personally start each MS Teams meeting, so it is important to make sure you add the RCPCH IRS staff as a co-organiser to each MS Teams meeting so they are able to manage the meeting(s). Meeting co-organisers are displayed as additional organisers in the meeting participant list and have most of the capabilities of the meeting organiser. They can bypass the lobby, admit people from the lobby during a meeting, and end a meeting.

Please refer to Appendix C for further information.

6.   Communicating with interviewees

6.1   Once the date and time is confirmed with each interviewee, it is recommended that you send as a calendar invite and as an email. In the email, you can also include (if not already done so OR as a reminder) the following information:

(i)   The final dated PDF of Terms of Reference.

(ii)   The booklet 'Information for participants & interviewees in a RCPCH invited review.' This is available on the SharePoint site in the folder 'RCPCH Invited Reviews Programme Information & Guidance' and can be downloaded.

(iii)   The RCPCH review team biographies, which will have been shared with you.

(iv)   According to what you have agreed with your Medical Director/Chief Medical Officer, information about what documents your HCO has shared with RCPCH for the invited review and the mechanism by which interviewees can submit information which they wish to be considered for the invited review (see section 4.1 above.

> Note. That RCPCH considers participation in the invited review to be on a voluntary basis. It encourages those who are invited for interview, to participate and highlights that it aims to provide a safe space for active listening and supports input

from and the perspectives of those involved in delivering care in the service concerned.

7. Considerations for logistics and IT

7.1 It is recommended that you consider the actions set out in the table below for the forthcoming invited review:

Actions for considerations	On site	Online via MS Teams
Book hotel for review team or advise RCPCH Invited Reviews Service to do and what the allocated budget is	Y	N
Named person to meet review team and contact number provided	Y	N
Meeting room suitable size to accommodate review team plus interviewees and in which ensures private discussion	Y	N
If multiple sites involved, suitable room booked at each and a named person to meet the review team	Y	N
Waiting area for interviewees	Y	N
Tea/coffee/water for interviewees *(if coming to site for their MS Teams interview)*	Y	Y*
Tea/coffee/water and lunch for review team	Y	N
Room for interviewees to dial in for interview with suitable IT equipment set up for MS Teams. Room must ensure confidentiality of discussion so ensure cannot be heard outside of the room and avoid rooms in which individual will be visible.	N	Y
Ensure computer/laptop provided onsite for use by interviewees allows access to MS Teams and that VPN settings permit the use of audio and video capabilities. You may need to check with your IT support services. Please see Appendix 3 for information on how to test a device for MS Teams capability.	N	Y

8. Providing feedback on your experiences of the RCPCH IRS

8.1   As part of its commitment to continuous quality improvement, the RCPCH IRS seeks feedback from both HCOs and reviewers via surveys.

8.2   After RCPCH has issued the invited review report to your HCO, the IRS will send you as the HCO coordinator a request to circulate the relevant survey links to senior management team members involved in the invited review, interviewees and participants. A template email will also be provided to assist you.

8.3   The privacy notice relating to the collection of review-related data can be found at: https://www.rcpch.ac.uk/rcpch-invited-reviews-feedback-survey-privacy-policy.

# Appendix A: Information on uploading documents to SharePoint

Accessing folders

(i)   Click on the folder to open it, right click to see a menu for further actions

(ii)   To go back a stage, click on the document's header or the left-pointing arrow at the very top of your screen.
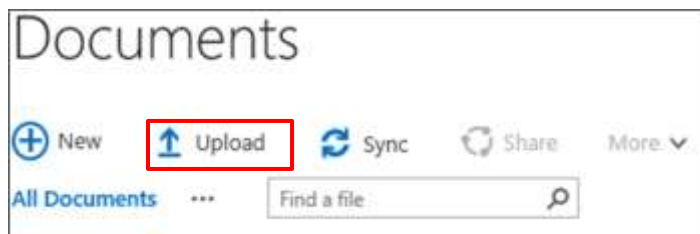
Uploading files to SharePoint

(i)   You can usually drag files from your computer and drop/upload them to the SharePoint site.

(ii)   To upload files to the 'Supporting information provided by HCO' folder:

➢   Open SharePoint by following the provided link and navigate to the 'Background information' folder.

➢   On your computer select Start Windows   and then type 'File Explorer'.

➢   Select the files you want to copy and drag them to the space within the SharePoint 'Background information' folder.
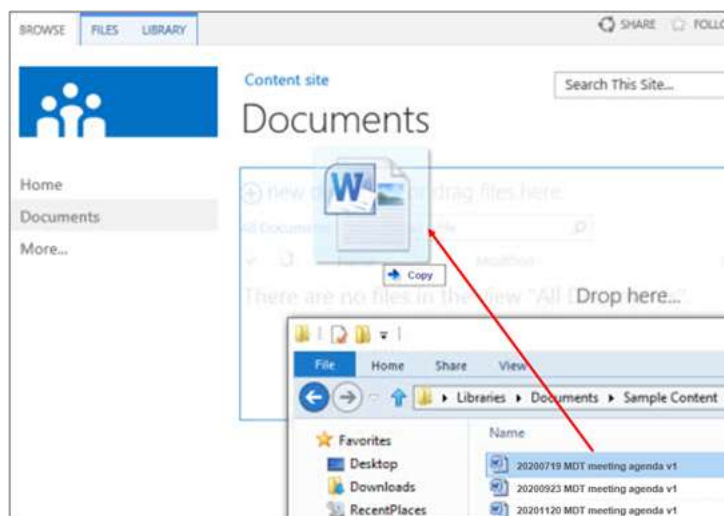
➢   Your files will appear in the designated folder; however, depending on the number and size of files you have copied across, it may take a few minutes for them to appear in SharePoint – you should see the below message, which indicates that the files are in the process of uploading.
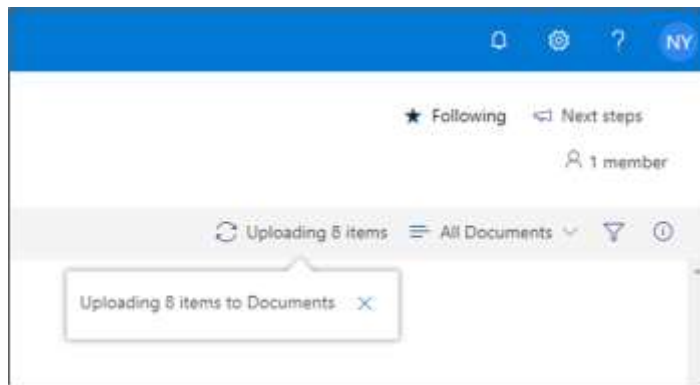
> Note. 'Drag and drop' works best with the new version of Microsoft Edge or Google Chrome internet browsers. For other browsers, you can use the Upload command as an alternative method (as illustrated below).

Upload errors

Uploading errors will likely result in the files/documents not being able to be opened/viewed. The following may contribute to upload errors:

(i) Long path and file names: SharePoint can support up to 400 characters for the total file and path length.

(ii) File formats not supported: you are uploading documentation which has been created, or saved, in the most recent version of Microsoft Office. Newer versions of Office add new features that may not be available with older versions of Office. New versions can read documents created by older version, but older versions can't read newer documents. For example:
- If you are using Microsoft Office Word 2007 or Word 2010, you can open .docx or .docm files that were created in Word 2016 and 2013.
- Excel 2016 saves files in an .xlsx format, while Excel 2003 only reads .xls format.

(iii) Corrupt files: if the file opened previously, but now doesn't, there could be a problem with a corrupt file, or the format is not compatible with any of your apps. Make sure when you save a file, you try to open it to make sure it was saved correctly. For example, if a spreadsheet is opened as a .xls, make sure it is saved as an .xls file.

Appendix B: Information on IT issues

Making a test call in MS Teams

To make a test call to see how your mic, speaker, and camera are working:

(i) In the top right-hand corner of MS Teams, next to the circle with your profile picture or initials, click on the three dots. A drop-down menu will appear. On the drop-down menu click Settings.

(ii) A pop-up menu under settings will appear, click Devices and choose Make a test call under Audio devices.

(iii) Follow the instructions from Test Call Bot and record a short message. The message will play back for you. After that, you'll get a summary of the test call, and you can go to your device settings to make changes.

(iv) If you wish to have a test call at any stage with a member of the Invited Reviews Service, we would be happy to arrange this.

If you wish to have a test call at any stage with a member of the Invited Reviews Service, we would be happy to arrange this.

## I am seeing error messages when I try to access SharePoint

(i) There are many scenarios that can prompt a message such as "Access Denied" or "You need permission to access this site". The most common cause is that permissions for the user or administrator are configured incorrectly or not configured at all.

(ii) Please contact the Invited Reviews Service at invited.reviews@rcpch.ac.uk for further assistance in accessing the folders/files you need.

Appendix C: Technical information on timetables and online interview set-up

Opening and editing the interview timetable

The draft template timetable in the SharePoint 'Reference & Actions' sub-folder is opened for editing and populating by two routes:

(i)   Left click on the file name within SharePoint to edit and populate the timetable template directly in your browser via Microsoft 365 (Word online).

(ii)   Right click on the file name within SharePoint and select 'open in app.' This opens Word on your device rather than in the browser and you will be able to make your edits working in traditional Word (if installed on your device).
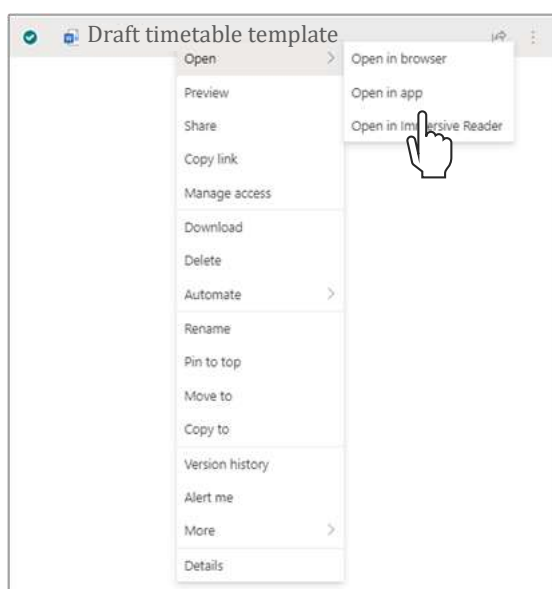
(iii) In both routes (i) and (ii), your edits to the draft timetable will save automatically as autosave is switched on.
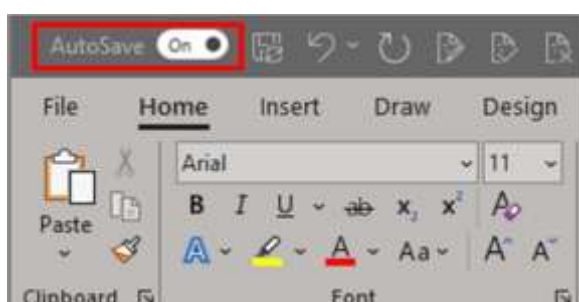
Note. We recommend that you do not download a copy of the timetable template to make edits as these will not be able to be seen by the RCPCH Invited Review Service. Even if you save it to your local folders and re-upload to SharePoint for the Invited Review Service to see, it may cause confusion regarding versions.

(iv) Insert a comment to raise a point, query or start a discussion by selecting the section of text in the timetable, go to Review > New Comment, type your comment and click the tick. You can also:

- ➢ Edit your comments by clicking on the pencil icon in the comment box
- ➢ Reply to a comment raised by the RCPCH Invited Reviews Service - go to the comment and select Reply.
- ➢ Delete a comment – right click the comment and choose Delete Comment.

Creating and sharing MS Teams calendar invites for online interviews

As noted in section 5.3 above, for any interviews which are to be conducted remotely online via MS Teams, you will need to create a separate MS Teams meeting for each interview, and

(i) Send it to the interviewees concerned as a calendar invite. Also write by email confirming the date and time of the interview (and location if you have booked a room), include the MS Teams link and phone dial in details.

(ii) Do not send the calendar invite to the RCPCH IRS staff; instead, copy and paste the MS Teams link into the timetable next to the relevant interview slot, including the associated meeting ID and passcode (in case tech difficulties arise and the review team in need to dial in by phone).

(iii) Once you have created and invited the relevant people to each MS Teams meeting, in either Outlook or in the MS Teams Application, add the RCPCH IRS staff as a co-organiser for each meeting as follows:

- ➢ Access the calendar you set up the meeting through in the MS Teams Application by opening MS Teams and choosing the calendar icon on the lefthand panel (#1 in below image).
- ➢ Find and open the meeting invite by right clicking on the invite and selecting Edit (#2 in below image) – this will open the invite so you can view the people you have already invited, make edits to the invite etc.
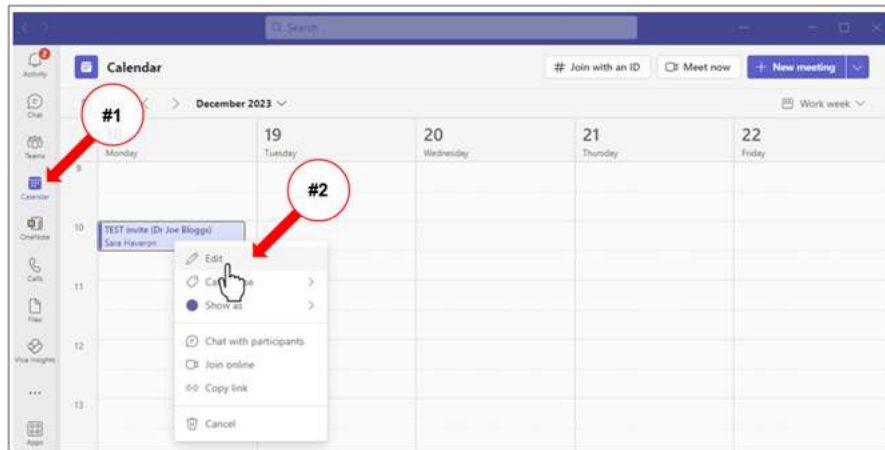
> ➢ Select the three dots for more options and then click on Meeting options (#3 in below image). This will open the meeting invite in your internet browser (e.g., Chrome, Firefox, Microsoft Edge).
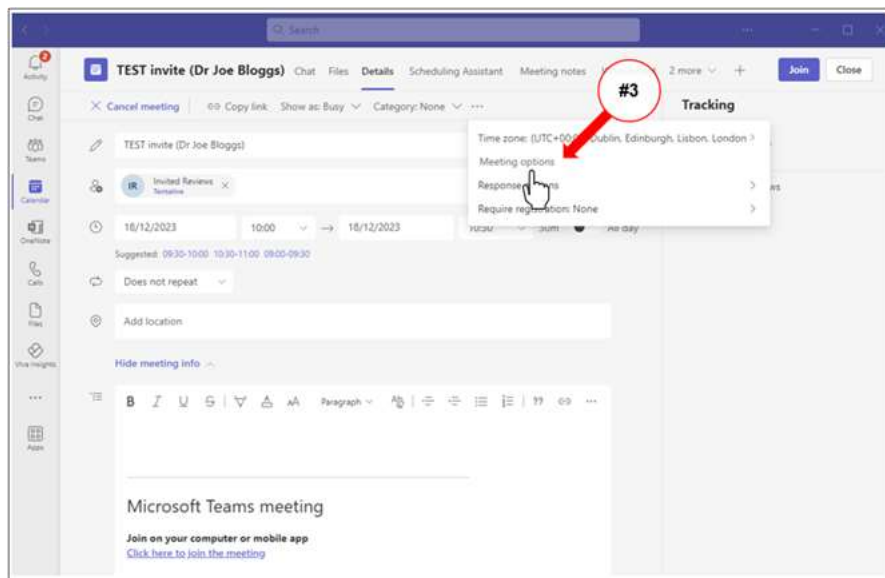
> ➢ Once in your browser, on the meeting options page, next to Choose co-organisers, select the down arrow and select the name of the RCPCH Invited Review Manager to add them as a co-organiser (#4 in below image).

➢ Select Save (#5 in above image) and repeat for each invite.