# engage
## HEALTH SYSTEMS

# Engage Consult Checklist for Practice Implementation Planning Meeting

This checklist sets out the key decisions a practice team needs to consider when they're launching Engage Consult. You should aim to complete this before the Implementation Meeting.

| Questions to consider | Practice decision |
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| **1.  Monitoring and Evaluation** | |
| a.  What does the practice hope to achieve by implementing online consultations (OLC)? | |
| b.  Are there any specific measurable targets? How will these be reported? | |
| c.  What baseline statistics need to be reported to enable b. above? | |
| d.  What information needs to be recorded about how the request is dealt with?  Should the practice use an OLC template to ensure this information is recorded consistently? | |
| e.  How often will operation be reviewed? | |
| **2.  Roles and Responsibilities** | |
| a.  Who is the Clinical Change Leader / Deputy? What are their responsibilities? | |
| b.  Who is the Admin Change Leader / Deputy? What are their responsibilities? | |

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| c. Who should have access to configure the system? | |
| d. Who needs access to the Engage desktop app to process messages? | |
| **3. Communications and Engagement** | |
| a. Internal communications to practice staff – what is the best way to ensure everyone is involved and knows what they need to do?  Do all staff understand how to promote the service to patients and any particular scenarios/conditions you'd like patients to use it for. | |
| b. How will OLC be promoted to the practice population? (e.g. telephone message, website, NHS Choices, posters, leaflets, waiting room promotion, SMS, FaceBook, newsletter, right hand side of scripts) When will promotion start? Which patients should be targeted? | |
| c. What changes need to be made to the practice's phone system messages to incorporate OLC.  For example, updating the welcome message, queue entry message, and on hold message to encourage patients to use OLC. | |
| d. Do you have TVs in your reception that you can play the OLC video on?  If so, when will you update these. | |
| e. Does the practice need to develop or adapt its own materials?  (Engage Health will provide appointment cards, leaflets, posters, and a roll up banner for reception) | |

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| f. How will the PPG be consulted? What role will they have in supporting implementation / engagement of the wider practice population? | |
| g. How can the CCG Comms and Engagement team help? | |
| h. Do local services need to be consulted? e.g. re options for signposting to their services | |
| i. How will patient / staff feedback be gathered? | |
| j. Do you have any nursing, care, or residential homes that could make use of the system? | |
| k. Update your new patient registration process/pack to include information about using OLC. | |
| l. Have you made the link to the test system available to all staff so they know what the patient experience is when they're promoting the system to patients. Do they have access to the video showing the patient journey. | |

| 4. Operation and workflow | |
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| a. Who / which team will process incoming messages? | |
| b. Who / which team decides where the requests should be directed? | |

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| c. | Which type of request should be directed to which team / personnel? | |
| d. | How frequently will incoming messages be checked? | |
| e. | Who is responsible for verifying patient ID? | |
| f. | Who is responsible for checking all requests have been dealt with? | |
| g. | Within what time limit will requests be forwarded to someone for action? | |
| h. | How are clinical requests to be shared among the clinicians? (e.g. Duty doctor, usual GP, or Triage team?) | |
| i. | How will doctors action requests they deal with? | |
| j. | How will any follow up appointments be made? | |
| k. | How will other outcomes be dealt with and communicated to the patient? | |
| l. | How many slots (and of what length) will be booked out each session for OLC? | |
| m. | Has the staff induction been updated to include OLC? | |

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| n. Have all relevant policies and procedures been reviewed and updated? (for example, data protection impact assessment, equality impact assessment, clinical safety assessment, standard operating procedures, and clinical protocols) | |

| 5. System configuration | |
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| a. What (if any) additional local services should be added to the Portal? (e.g. links to online services or other local services that patients can self refer to). | |
| b. How should services be prioritised / displayed on the Portal? | |
| c. How does the practice want to use practice configurable questions and where should these be placed in the question flow? | |
| d. What alerts / signposting do the practice what to include in relation to specific symptoms? (e.g. Chest pain ... call 999, toothache....contact your dentist)? | |
| e. What, if any, additional text needs to be displayed against alerts? | |