Engage Consult Online Consultations Implementation Checklist

The following checklist has been created to provide practices with a step by step guide to successfully plan and implement Engage Consult online and video consultations within general practice. This document can be used in conjunction with the [Using Online Consultations In Primary Care Implementation Toolkit](#) to provide ideas and suggestions for the implementation process. The checklist can also be used post implementation to support ongoing practice development.

1. What is your Vision?	Lead	✔❌
Get consensus for change from your practice		
Collaborate with your CCG, Primary Care Network (PCN) and patients to develop the local vision, service requirements, feedback on systems and decide on the delivery model (e.g. practice vs hub)		
Build your working group to lead the change		
Decide what benefits you want to see		
Talk to other practices in your PCN/area and/or use the case study library to learn from what others are doing		
Map out your current processes, current patient journey and current challenges that you are trying to address. What effects are you anticipating online consultations will have on your staff and patients and what might be the unintended consequences?		
Plan how you will meet the needs of those who cannot use online services		

2. Strategy and Technology	Lead	✓❌
Speak to your CCG commissioner and PCN about what support you need for implementing online consultations. Work together to make the best use of resources and share learning		
Download Engage Consult Implementation Workbook		
Decide on your strategic approach. ➢ **Big Bang** – All patients to use online digital triage except where not suitable or where triage is not necessary e.g. screening programmes. This approach has the potential to shift a large proportion of the workload from face to face appointments to online quickly ➢ **Phased** – Gradual introduction by targeting cohorts of patients that would benefit from online triage, building up release whilst undertaking a promotion campaign ➢ **Targeted** – only identify certain groups of patients for online triage/consultation. This may have little impact on practice workload and will benefit less patients than the other two approaches		
Decide if you are installing online consultations as a 'group' approach to handling demand in your PCN		
Experiment with test accounts and watch Engage Consult demonstration videos to understand how the application works		
Involve your local IT leads early and discuss equipment and infrastructure requirements that you may have for example; additional monitors, desktops or laptops		

3. Engage Your Team	Lead	✓ ❌
Assess your readiness for change – talk to staff, your patients and PPG early and frequently: ➢ communicate a clear story for change and expected benefits ➢ get feedback from staff after watching the Engage Consult Demonstration Video ➢ share ideas and co-design the change process ➢ build feedback and discussion into clinical, team and PPG meetings ➢ Case studies indicate that on average an online consultation based on a questionnaire takes 3-6 minutes to process and over 70% can be completed remotely		
Nominate change champions		
Define your success criteria and how you will measure it		
Review roles and responsibilities and skills needed for implementing a total triage online consultation system		
Ensure staff are trained to care navigate/care co-ordinate patients to the most appropriate person, at the most appropriate time in the right place		

4. Redesign Patient & Clinical Pathways	Lead	✓ ❌

	Lead	✓ ❌
Review baseline workload, patterns, and types of demand		
Conduct a capacity and demand audit		
Match to staff rotas and capacity		
Chart team responsibilities and scope of practice (role-based activities)		
Restructure your work routine		
Change your appointment systems to incorporate online consultations effectively		
Design around patient needs and continuity of care		
Make template changes to appointment systems		

5. Agree your New Workflow	Lead	✓ ❌
Map the revised patent journey, removing internal barriers to change i.e. those processes that may conflict with the need for change, to ensure a smooth patient journey		
Decide on the workflow for online consultations		
Build and agree processes with your staff		
Check everyone in the practice knows the workflow and protocol to work to		
Walk through the patient journey with staff and members of your PPG		
Agree your contingency and Business Continuity plans		

Focus on providing a rapid response to meet same day demand		
Agree a response window for handling messages received (start & cut-off times)		

6. Policies and protocols	Lead	✓ ❌
Complete a data privacy impact assessment and update your privacy notice with input from your data protection officer		
Review standard operating procedures or plans for patient populations who you want to be using online consultations. What solutions do you have in place for those patients who you may not want to use online consultations?		
Work with your team to develop your standard operating procedures and protocols e.g. new work flow and consultation processes, templates/codes to use, suitability criteria, ID verification, managing urgent queries, escalation protocol, contingency plans, roles and responsibilities, deliberate misuse policy.		
Review policies on the use of SMS, remote working, role-based access and passwords		
Have a clear process for reporting issues or incidents and clinical governance		

7. Training	Lead	✓❌
[Complete Assisted or Unassisted Engage Consult Launch process](#)		
Confirm all your staff have completed the [Engage Consult training](#) (video or conference online training meeting)		
Ensure all staff have read and understand the new policies/protocols and understand their new roles and responsibilities		
Have [key messages](#) or a script for staff to use when promoting the service		
Ensure clinicians are comfortable with consulting online. Offer peer to peer reviews, joining webinars run by NHS England, encourage self-audit and review of patient feedback.		
Upskill staff – Care Navigators/Digital Champions/Care Co-Ordinators; Project Management Skills		
Check your clinical staff have familiarised themselves with: ➢ how the online consultations look from patient registration to handling incoming messages ➢ how to review messages (including how serious symptoms are flagged) ➢ how to handle messages – assigning to other users, sending 2- way messaging, instigating video consultation, attaching the message to the clinical system ➢ how to 'cover absent colleagues' ➢ assessing patient's suitability for remote care ➢ how to conduct a video consultation (if applicable) from within the Engage Consult application		
Use [test patients](#)to process real patient scenarios to build confidence in the system		
Ensure all process guidelines are accessible by staff from your shared drive		
Download training guides and toolkits from www.engagehealth.uk		

Update staff induction and training packs, and locum packs with online consultation process information		

8. Promotion	Lead	✓❌
Decide whether you will promote the service before or after going live. Create a communication & engagement plan		
Change your practice automated phone messages with one of the senior partners endorsing the service		
Make the online consultation banner prominent on the website home page, ideally being able to see it as soon as you open your practice website with text explaining how patients are to use the application. Check that the online consultation banner and link are visible when using mobile devices.		
Make the pledged response times obvious and when they apply clear to patient users		
Ensure information on what patients should do if they have an emergency complaint is provided on the website and matches information given in Engage Consult (NHS111/999)		
Market the service with every interaction. How else will you promote it? SMS, posters, leaflets, banners, electronic display screens, demos in the waiting room. Refer to the Engage Consult Communications & Engagement Toolkit for more ideas and tips.		

Promote the benefits of online consultation for patients & staff based on patient/staff pain points ➤ **Improved Access** – timely advice, reduced waiting times, convenience, available for patients to send in messages 24/7/365, avoids unnecessary visits to the practice for routine care and advice. ➤ **Patient Satisfaction** – higher level of satisfaction, feel more at ease, continuity of care, avoiding the waiting room, saves patients time and cost in travel to the practice. Gives patients time to explain their problem without feeling rushed. ➤ **Quality of Care** – Engage Consult picks up conditions that may require an alternative emergency treatment pathway, empowers patients to self-care with links to self-help advice, comprehensive instant medical history triage ➤ **Efficient** – right patient, right time, right place, right professional. Optimises practice skill mix, clinicians have access to the triage and medical history before consultation. Improved data capture and 2-way messaging saves clinician time. ➤ **Supporting Staff** – control over workload, offers flexible working solution to increase staff satisfaction & retention		
Order promotional materials from Engage Health		
Make the most of your PPG/patient groups, using them as champions, write up their experience in your practice newsletter or website		
Encouraging reception staff and clinicians to promote the service to patients is the most successful promotional tool – record a short video clip for your website or waiting room monitors promoting the Engage Consult online service as a patient's first stop when contacting the practice for routine admin & clinical enquiries		
Set up a mechanism for monitoring feedback from staff and patients – You Said We Did responses to feedback about Engage Consult & usage figures promoted in your newsletter/website/waiting room(s)		

9. Set your launch date	Lead	✓✗
Agree a go live date and appoint an implementation lead to provide oversight and a point of contact		
Pick a week with no planned staff absences		
Ensure you have capacity to meet expected demand of the service		
Ensure staff rosters include time set aside to respond to online consultation enquiries		
Collect pre-Go Live data to aid comparisons of before and after implementation: appointment and phone call volumes, time spent consulting, appointment waiting times,		
Ensure all pre-launch information has been updated within the MyEHS application, and all staff responsible for handling messages have activated their accounts with valid passwords		
Ensure that the desktop application has been downloaded to all PCs and laptops within the practice		
Review your practice clinical registers to identify cohorts of patients that will benefit from accessing online consultations e.g. those registered with a disability, carers, hearing impairment and those residing in care or residential homes.		

10. Monitor impact	Lead	✓ ❌
Track performance using reports function within Engage Consult		
Share impact and usage figures with staff and patients		
Map demand patterns to capacity		
Monitor phone call and appointment waiting times		
Get daily feedback from staff and patients – is it meeting your expectations?		
Monitor impact on workloads for admin and clinical staff		
Assess effectiveness of processes/protocols, and make changes under review using the Plan Do Study Act principle		
Share information with PCN/group to facilitate further opportunities for system efficiencies		
Share learning in team, PCN meetings and with your local CCG Leads for online consultation		
Book a review meeting with your Engage Consult lead 6-8 weeks post launch, are any improvements needed? Catch bad habits early, set up peer-peer support		
Contact your Engage Consult Lead if you need further training, support, to report any issues or make system changes to adapt the offer to meet your local need		