Online
Consultations

How to guide

Before you start - how to use this document

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This toolkit has interactive elements

If you see text that looks like me, I'm a hyperlink...

...You can also click on the contents icons in the footer to jump to that section

Contents

Introduction

Welcome to our guide to support GP practice managers, clinicians, commissioners and primary care networks to implement and make the best possible use of online consultations and associated digital tools.

It provides concise, London-specific guidance on all the different aspects of successful online consultations and shares good practice including case studies and examples.

We will update this guide as work on online consultations develops. If you feel we should add information on a particular topic or want to find out more, please contact us on:

✉ **england.londondtt@nhs.net**

What is an online consultation?

Online consultations enable people to contact their GP practice without having to wait on the phone or visit the practice. They offer a quick, convenient and secure way to seek advice.

Gathering information from the patient via an online consultation tool supports practice staff to understand their needs and ensure advice or care is provided by the right person, at the right time and in the right way.

Following changes to GMS, PMS and APMS contracts, as of October 2022 **all directly bookable appointments** must be available online, as well as by phone or in-person. Directly bookable appointments are ones that do not need to go through a triage process, for example, blood tests.

Total triage

A total triage model uses a combination of telephone and online consultations to gather information from every patient rather than allocating appointments irrespective of need. This enables practices to prioritise patients with greatest clinical need and to better match demand to capacity. More complex requests will be better understood and the patient will be booked in for the right type of appointment, while straightforward requests will be dealt with quickly using pre-written responses.

Introduction | Optimising workflows | Collaborative hubs | Patient engagement | Online presence | Managing demand | Procurement of tools | Evaluation | Useful resources

How GP practices are using online consultations, with case studies

Online consultations can be used to:

- report symptoms

- ask about a referral for a test

- submit an administrative request, such as for a fit note

- discuss a test result

- ask about an existing condition or medication

- provide the practice with health data - e.g. smoking status, latest blood pressure readings

- upload photos where appropriate to help with assessment of patients' health conditions

- make an appointment for a video consultation

- highlight a problem that needs a face to face, phone or video consultation with a GP or other member of the practice team.

When online consultation systems are implemented well, both patients and staff tend to report high levels of satisfaction. Patients benefit from the ability to get their issues dealt with much faster and signposting to other services if needed, as well as avoiding long waits on the phone and/or the need to call at specific times of the day.

Benefits to practices include relieving some of the administrative workload of practice staff, and the ability to free up phonelines for vulnerable patients and those who need them.

Several online consultation tools are available to GP practices. All offer similar key functionality. Patients complete an online form on the practice website or via an app, which is submitted electronically. Practice staff triage the forms and provide the most appropriate response. This can be a phone call, video call, an invitation to a face-to-face appointment or a simple text or online message. The patient can also be referred to other services such as community pharmacy or other workforce such as a physiotherapist or social prescriber.
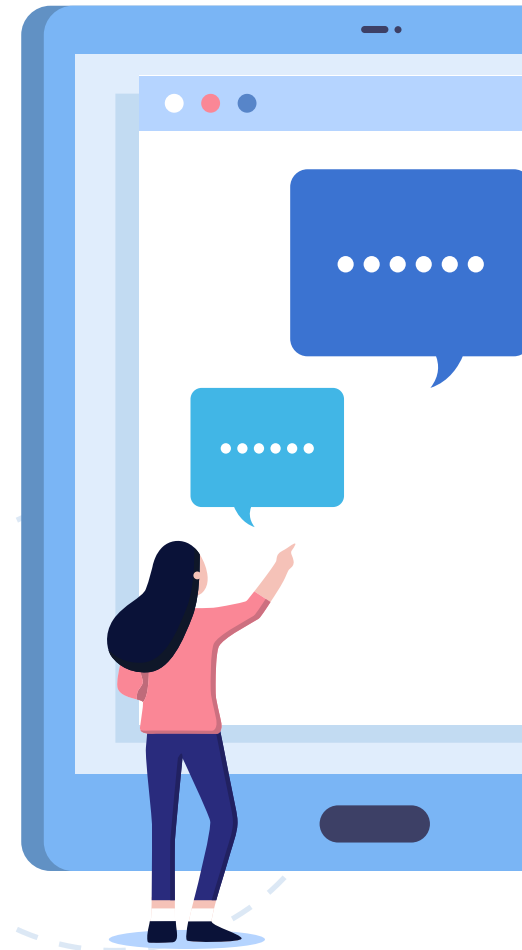
Case studies

The Project Surgery,
Newham

Docklands Medical Centre,
Tower Hamlets

Elsdale Street Surgery,
City and Hackney

Rydal Practice,
Redbridge

Tollgate Medical Centre,
Newham

Key features of online consultation tools

Functionality

GP IT and NHS system integration

✔ Requests come directly into the workflow

✔ The complete record of the online consultation is saved to the patient record

✔ Interoperability to save coded information directly into the patient record

✔ Ability to retrieve patient record when triaging/managing patient's request in the online consultation system

✔ Some online consultation tools have integration with the NHS App so that patients can send a request directly from it, and the list is growing

✔ Integration with NHS login

✔ Ability to support hub working

✔ Single sign-on to enable staff access without the need for separate login details

✔ Ability to verify patient details against Personal Demographics Service (PDS)

Patient journey

✔ Patient can login/create an account

✔ Patient can make an administrative request

✔ Locally customisable online consultation templates/forms

✔ Ability to include attachments/images in online consultation requests

✔ Patient can leave feedback

✔ Ability for staff to input a patient's request or feedback on their behalf

✔ Health or care professional can initiate an online consultation request

✔ Signposting to local services/self-help

✔ Automatic signposting for urgent symptoms/emergencies

✔ Some tools also provide language translation

Key features of online consultation tools (continued)

Management of online consultations

- Patient can be matched to their patient record

- Dashboard/inbox overview to review online consultation activity/status

- Online consultation requests can be assigned to a health or care professional manually

- Online consultation requests can be assigned to a health or care professional automatically

- Ability to link online consultation requests for support with responses

- Ability to send notifications to patients via i) SMS ii) NHS App iii) email iv) other specified

- Automated response to online consultation requests for support from patients

- Automated response to administrative requests from patients

- Ability to automatically prioritise online consultation requests

- Ability to manually prioritise online consultation requests

- Ability to manage pre-written template messages at user and organisation level

- Online consultation access can be turned on/off as required

Video consultations

- Ability to hold video consultations

- Patient can instigate video consultation

- Video consultation coding

- Ability to record video consultations with patient's consent

- Patient support for video consultations

- Ability to support virtual group video consultations

- Ability to switch from telephone to video

- Health or care professional can share their screen during a video consultation

- Health or care professional can view the patient record during video consultation

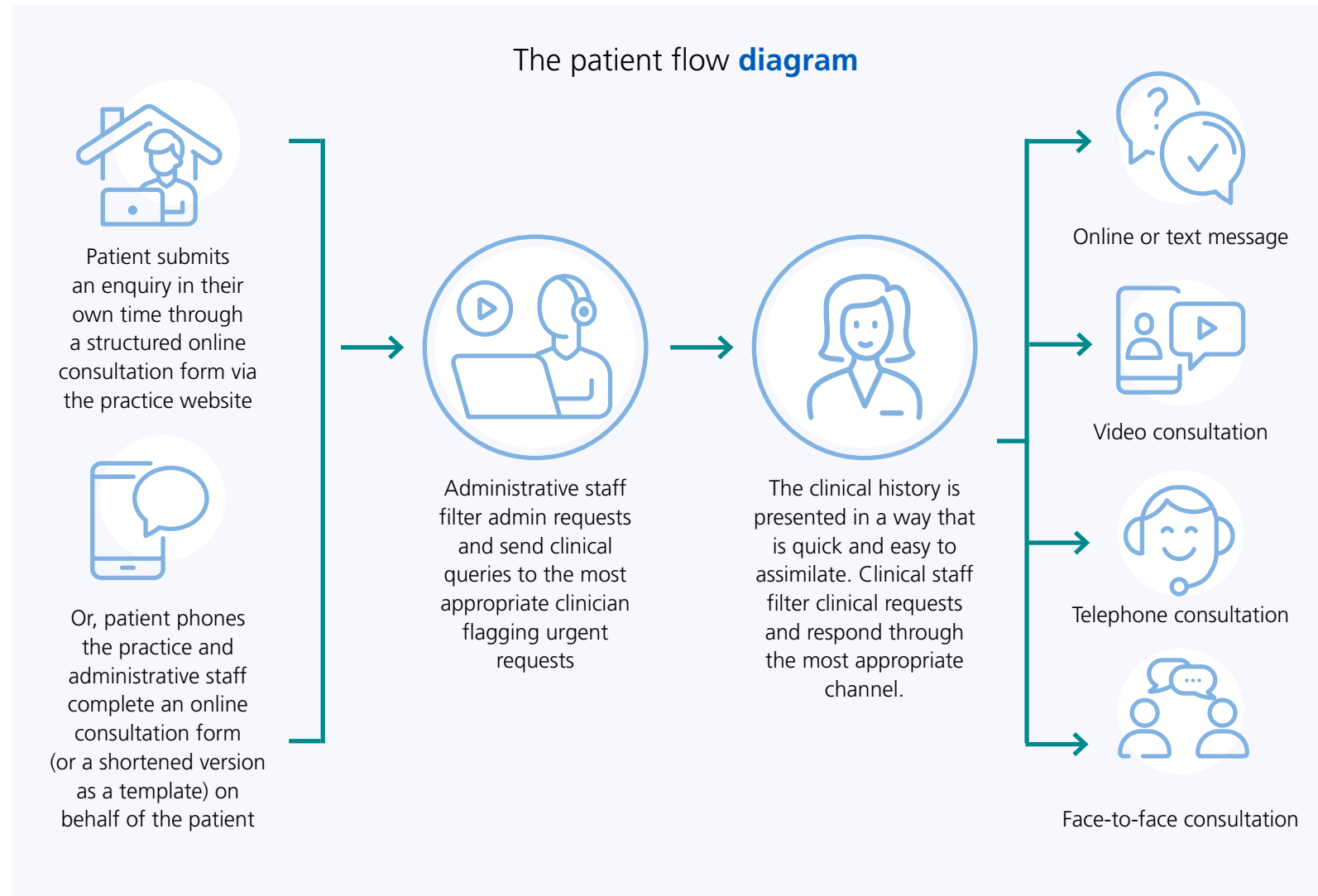- Ability to electronically share files during a video consultation

Other features

- Templated messaging

- Pre-written questionnaires

- Two-way messaging

- Availability of data and reporting

- Patient can self-book appointments

Optimising workflows

This **step by step guide** created by EQUIP in Tower Hamlets can help practices implement and improve the effectiveness of online consultations.

This **e-learning resource** can support general practice administrative staff to design their process for sorting, signposting and delivering administrative triage while maintaining an inclusive approach to managing demand and workloads.

The patient flow diagram (opposite) shows the recommended total triage model for practices. It enables requests to be triaged consistently and appropriately, and care to be provided to the person in a way that meets their needs.

The patient flow **diagram**

Patient submits an enquiry in their own time through a structured online consultation form via the practice website

Or, patient phones the practice and administrative staff complete an online consultation form (or a shortened version as a template) on behalf of the patient

Administrative staff filter admin requests and send clinical queries to the most appropriate clinician flagging urgent requests

The clinical history is presented in a way that is quick and easy to assimilate. Clinical staff filter clinical requests and respond through the most appropriate channel.

Online or text message

Video consultation

Telephone consultation

Face-to-face consultation

Making the most of the support available

When patients are involved in planning and implementing online consultations from the start, any issues can be picked up early and changes made as a result. It will also help to build trust and potentially recruit patient champions for the new system. **This case study from Somerset** has useful ideas for patient and staff engagement. A good service, which is easy to use, has clear patient benefits and is well communicated, will quickly win support and uptake. Patients who do not wish or are unable to use digital tools also need to be catered for.

If your practice has a Patient Participation Group (PPG), the patients who attend it will be an invaluable source of input and insight for you as you seek to implement new workflows, explore receptiveness to online consultation tools, and meet the needs of non-digital patients. They may also be able to guide you on how to engage with different patient groups and build acceptance of the new system.

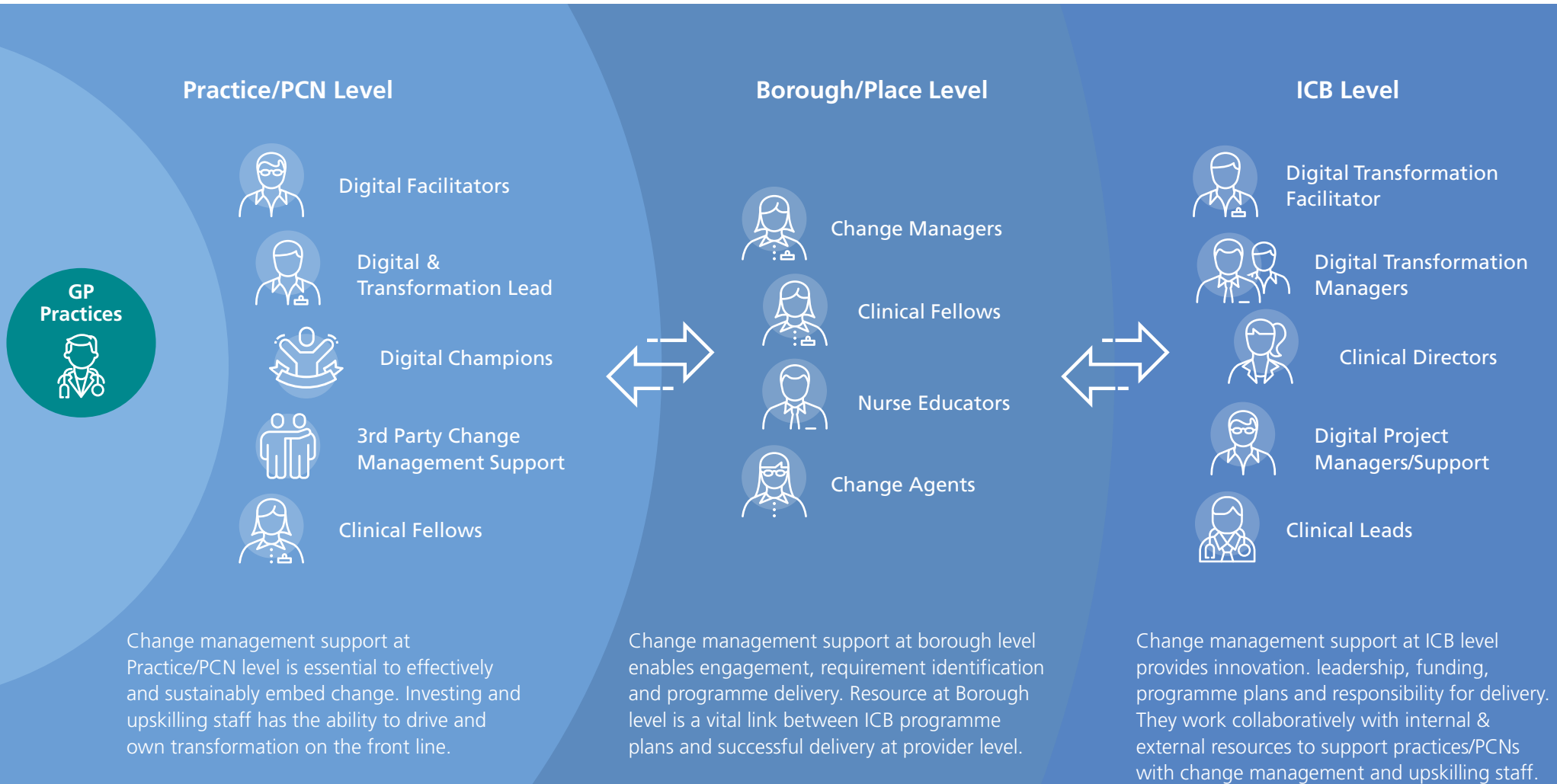## Roles supporting digital transformation

Across London, people in many different change management roles are working together to deliver effective, sustainable change across primary care and the wider health system: see the diagram on the next page.

Although each role and level has slightly different responsibilities, all support wider and/or improved utilisation of digital tools and efficient integration of the tools. We encourage you to engage with your integrated care board (ICB) about how you can make use of the services provided by these change leads.

Digital champions at practice/PCN level are invaluable in leading change. They will help advocate for and promote the implementation of online and video consultations as well as other critical primary care processes. They can help to address local issues and resistance to bring about positive change, working with suppliers, cascading training, and coaching clinical and non-clinical staff in new ways of working.

Roles supporting digital transformation

Practice/PCN Level

GP Practices

- Digital Facilitators
- Digital & Transformation Lead
- Digital Champions
- 3rd Party Change Management Support
- Clinical Fellows

Change management support at Practice/PCN level is essential to effectively and sustainably embed change. Investing and upskilling staff has the ability to drive and own transformation on the front line.

Borough/Place Level

- Change Managers
- Clinical Fellows
- Nurse Educators
- Change Agents

Change management support at borough level enables engagement, requirement identification and programme delivery. Resource at Borough level is a vital link between ICB programme plans and successful delivery at provider level.

ICB Level

- Digital Transformation Facilitator
- Digital Transformation Managers
- Clinical Directors
- Digital Project Managers/Support
- Clinical Leads

Change management support at ICB level provides innovation. leadership, funding, programme plans and responsibility for delivery. They work collaboratively with internal & external resources to support practices/PCNs with change management and upskilling staff.

Training for staff

Your online consultation supplier will provide training resources such as user guides, webinars, and videos to demonstrate how to deploy and use the online consultation tool. Suppliers will also explain the process for reporting incidents or issues and provide you with a point of contact. You can discuss with them any further training requirements you have, to make it more bespoke.

The London Digital First team has created a **repository** where online consultation suppliers have provided training tools.

It is important that all practice staff complete training on the online consultation system so they understand it and can use the technology effectively. An ongoing programme of training will ensure consistency and continuity despite staff changes. You may want to schedule:

> training as part of inductions

> refreshers and updates

> audits for adherence to protocols and variations in practice

> discussions at team meetings

> appraisal and feedback.

You may want to run team simulations using 'test' patients and real scenarios to understand workflows and test the end-to-end process. It is also useful to encourage staff to submit their own online consultation requests so they understand the system from a patient perspective.

Training for staff (continued)

Tips

Provide team and peer-led training (confident users support others) and a go-to person for support/queries. This can evolve into a network of digital health champions.

Ensure everyone is clear about their roles and responsibilities, and specifically acknowledge the new role for administrative staff in encouraging people to use online consultations and completing the form for patients.

Include your wider clinical workforce in training e.g. pharmacist, nurse.

Ask about digital confidence and development needs, and adapt training where appropriate.

Encourage staff to provide feedback on training and processes.

Encourage staff to promote and demonstrate online consultations to patients.

Create template answers to common queries so that a quick and consistent response can be given to patients.

Ensure practice staff regularly review patient feedback about online consultations **(see also page 21).**
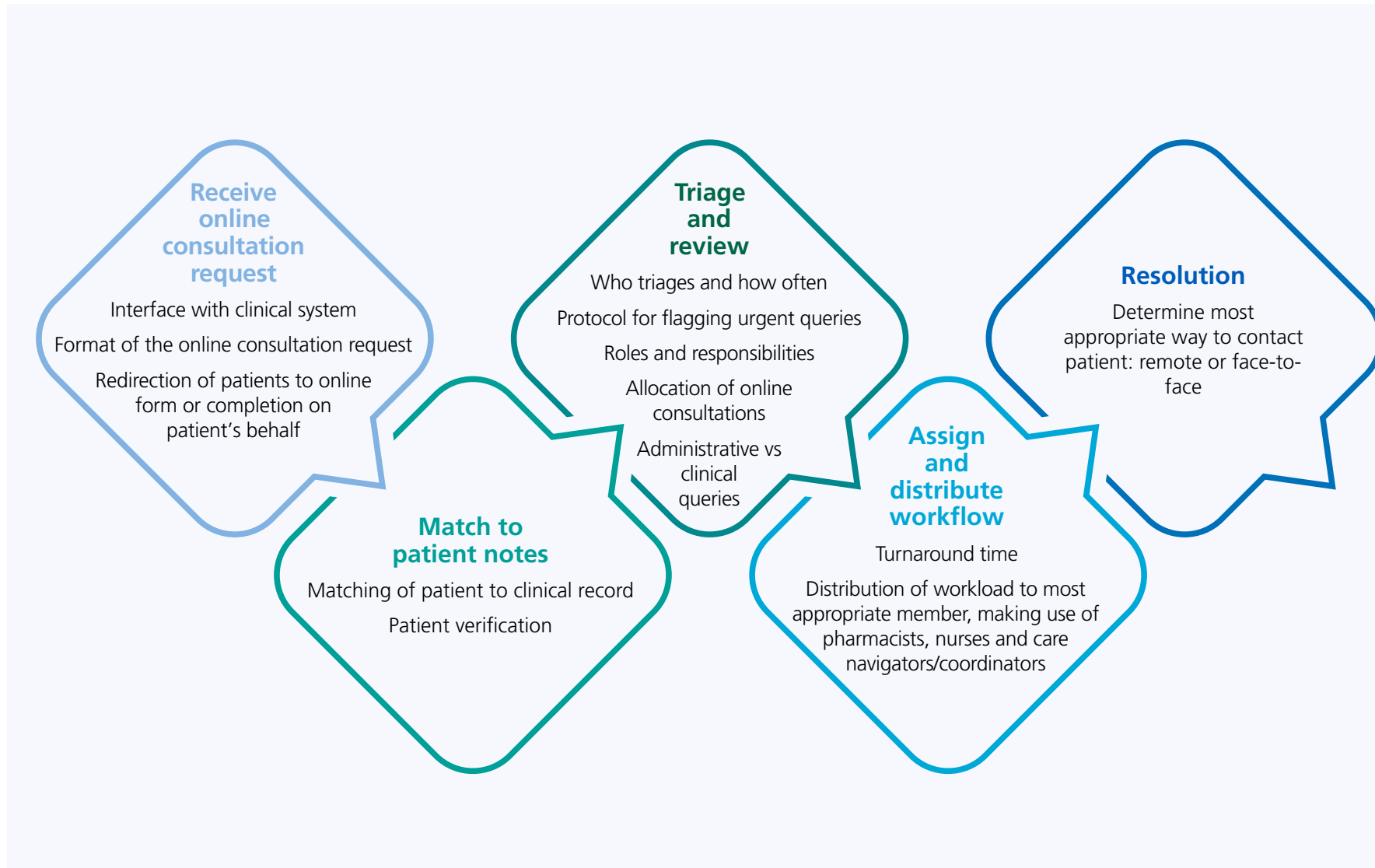
Workflow

It is important to have a robust process for managing online consultations. **Redesigning** the workflow and patient journey can help practices to better understand demand, activity and capacity, as well as the impact on administrative workload and patient experience. The general flow of a patient's journey is outlined in the diagram opposite, along with some key factors to consider.
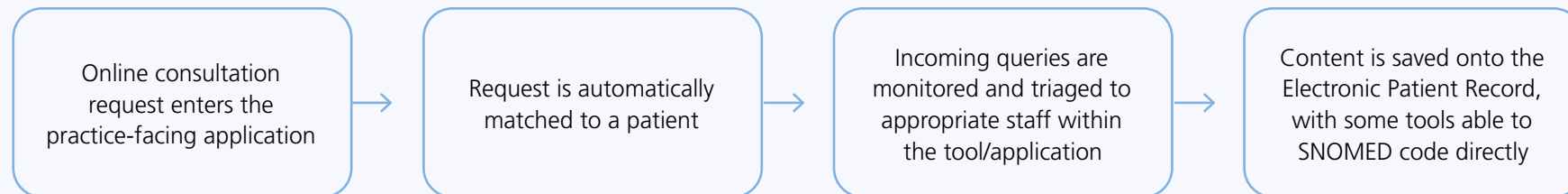
Examples of workflows

Speak to your online consultation supplier and digital champions in the first instance to understand how you can get the most from your software. It's also advisable to test the patient journey. On the next page are some examples of workflows used by practices.
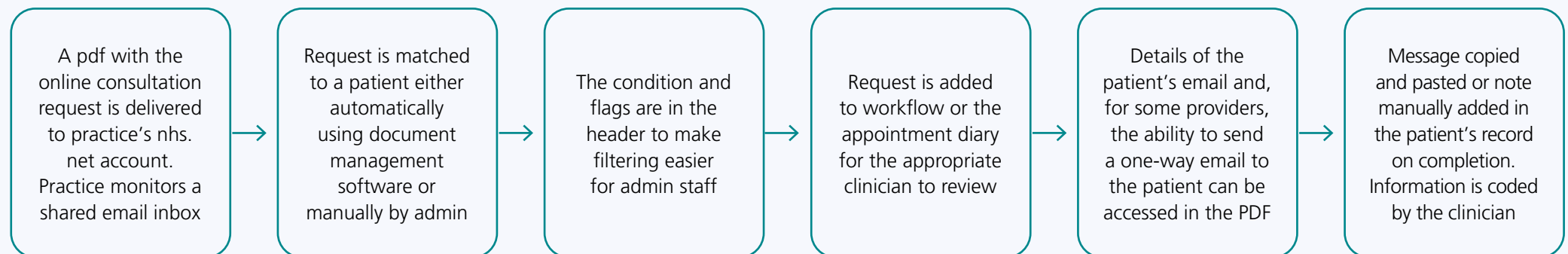
Receive online consultation request
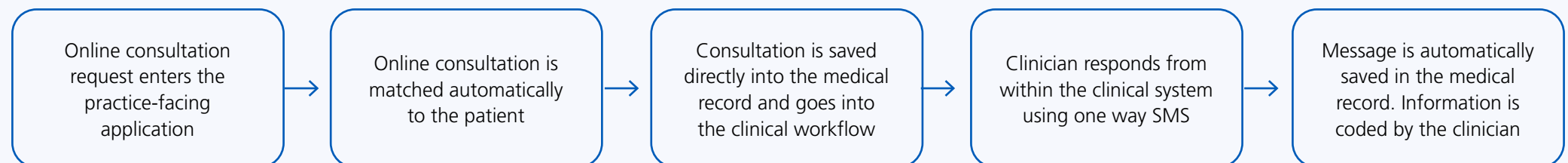
Interface with clinical system

Format of the online consultation request

Redirection of patients to online form or completion on patient's behalf

Match to patient notes

Matching of patient to clinical record

Patient verification

Triage and review

Who triages and how often

Protocol for flagging urgent queries

Roles and responsibilities

Allocation of online consultations

Administrative vs clinical queries

Assign and distribute workflow

Turnaround time

Distribution of workload to most appropriate member, making use of pharmacists, nurses and care navigators/coordinators

Resolution

Determine most appropriate way to contact patient: remote or face-to-face

Examples of workflows

Example 1:

| Online consultation request enters the practice-facing application | → | Request is automatically matched to a patient | → | Incoming queries are monitored and triaged to appropriate staff within the tool/application | → | Content is saved onto the Electronic Patient Record, with some tools able to SNOMED code directly |

Example 2:

| A pdf with the online consultation request is delivered to practice's nhs. net account. Practice monitors a shared email inbox | → | Request is matched to a patient either automatically using document management software or manually by admin | → | The condition and flags are in the header to make filtering easier for admin staff | → | Request is added to workflow or the appointment diary for the appropriate clinician to review | → | Details of the patient's email and, for some providers, the ability to send a one-way email to the patient can be accessed in the PDF | → | Message copied and pasted or note manually added in the patient's record on completion. Information is coded by the clinician |

Example 3:

| Online consultation request enters the practice-facing application | → | Online consultation is matched automatically to the patient | → | Consultation is saved directly into the medical record and goes into the clinical workflow | → | Clinician responds from within the clinical system using one way SMS | → | Message is automatically saved in the medical record. Information is coded by the clinician |

How to optimise your workflow

> Use a shared inbox so all staff members can pick up submissions.

> Allocate sufficient staff (clinical and administrative) to process online consultations so clinically urgent requests are managed in good time.

> Ensure there are enough administrative staff available, including at peak times, to answer phones and manage front reception for patients who are unable to use online consultations.

> Consider having a dedicated team to manage online consultations and allocate them to the most appropriate person (if within the scope of the practice):

> > pharmacy requests to the prescribing pharmacist

> > asthma/COPD/diabetes-related requests to the specialist health professional

> > admin issues to administrative staff

> > only requests which require the expertise of a doctor to the GP.

> Have a contingency plan so submissions are still responded to in a timely way if staff are absent or there is technical failure, usability/access issues etc.
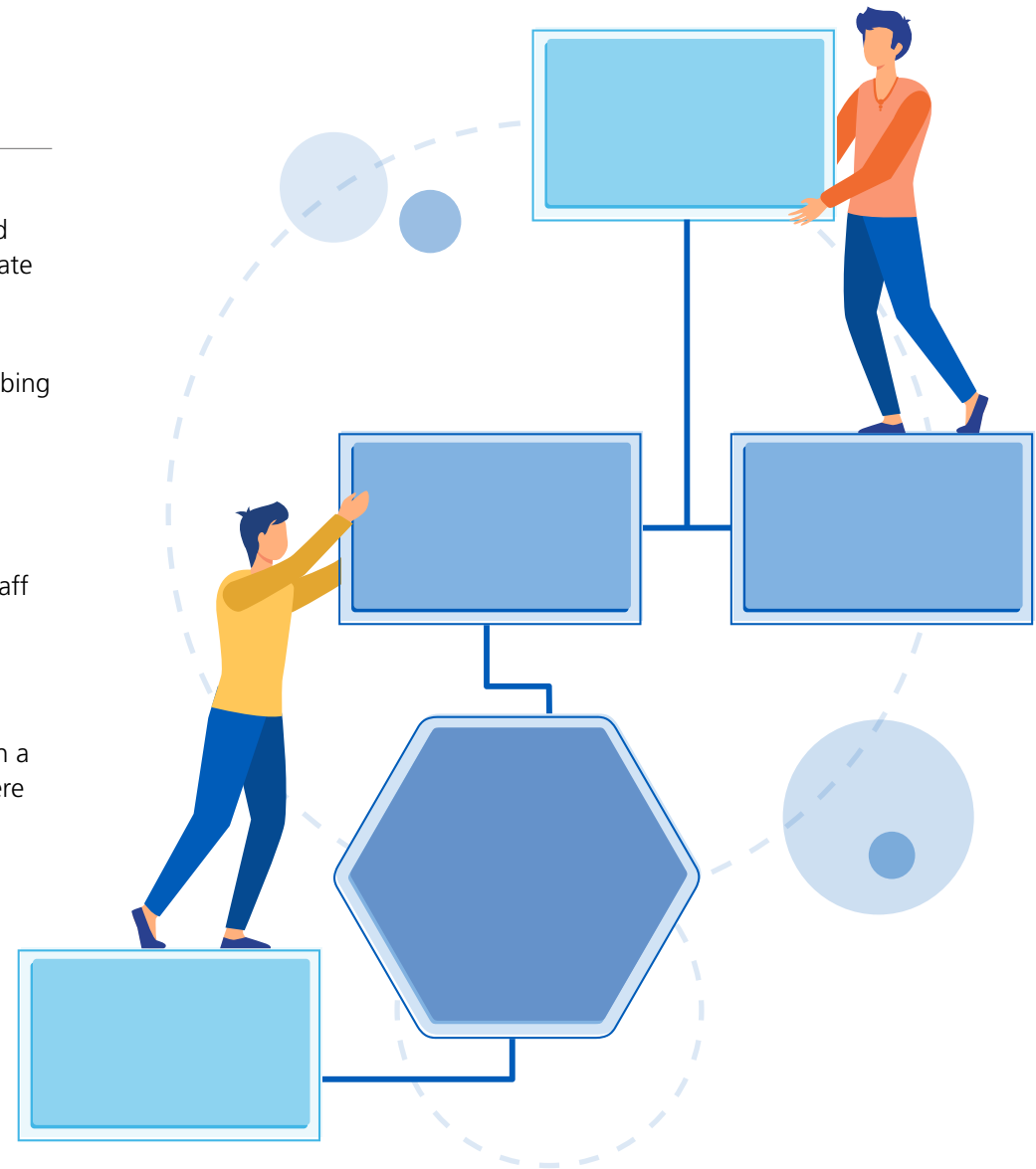
Guidance on patient navigation – with thanks to Putneymead Group Practice

Principles

The information on this and the following page is based on a guide designed by Putneymead Group Medical Practice for their staff which has been very successful at helping reception staff and practice managers direct online consultations to the right person with ease.

1. **Right time:** base urgency on clinical need, ensuring those with urgent problems get help as quickly as they can. Please ask a clinician if you are ever unsure.

2. **Right person:** wherever possible, honour a patient's request for continuity. If their issue is a follow-up, please open the notes to see which clinician has seen them about the issue.

3. **Right place:** could the patient's issue be better dealt with by someone else in the team? Consider nurse, physiotherapist, counsellor, social prescriber, minor injuries unit or pharmacist before booking with a GP.

4. **Right message:** always let the patient know what you have done (even if it is nothing yet!) so they know that their request is being dealt with.

Minor conditions suitable for self-care (so patient could be redirected to a pharmacist)
> Mild irritant dermatitis
> Dandruff
> Diarrhoea (adults)
> Dry eyes/sore tired eyes
> Earwax
> Excessive sweating
> Head lice
> Indigestion and heartburn
> Infrequent constipation
> Infrequent migraine
> Insect bites and stings
> Mild acne
> Mild dry skin

> Sunburn due to excessive sun exposure
> Sun protection
> Mild to moderate hayfever/seasonal rhinitis
> Minor burns and scalds
> Minor conditions associated with pain, discomfort and/or fever (e.g. aches and sprains, headache, period pain, back pain)
> Mouth ulcers
> Nappy rash
> Oral thrush
> Prevention of dental caries
> Ringworm/athlete's foot
> Teething/mild toothache
> Threadworms

> Travel sickness
> Warts and verrucae

Self-limiting conditions (i.e. often get better on their own)
> Acute sore throat
> Infrequent cold sores of the lip
> Conjunctivitis
> Coughs and colds and nasal congestion
> Cradle cap
> Haemorrhoids
> Infant colic
> Mild cystitis

Items of limited clinical effectiveness
> Probiotics
> Vitamins and minerals

Who might be more vulnerable to having an urgent problem?

> Infants <6 months or children with chronic illness, previously premature or who have failed to respond to treatment

> Older people

> People with suppressed immune systems (e.g. on chemotherapy)

> Pregnant women

> Those who have recently had surgery

> Those with unstable chronic disease (e.g. uncontrolled diabetes or COPD)

> People who are homeless

> Those who the practice has already flagged as vulnerable (see 'Vulnerable adult' alert on their notes, or 'child protection register')

> Those on the Learning Disability or Severe Mental Illness registers.

Guidance on patient navigation (continued)

Central chest pain	Unwell child/elderly person with fever, vomiting or pain	Adult with fever	Any minor injury	Lumps	**Direct access physio:** Chronic back pain or new/ongoing limb pain that can wait
Severe difficulty breathing	Unwell child <3m old	Problem after an operation	Burn/scald	Skin complaints (request photo)	**Direct access counselling:** Non-urgent, non-complex mental health
Facial swelling (severe) allergic reaction	Pregnancy: pain/ bleeding or reduced movement	Any infection (e.g. ear, eye, skin, urine, chest)	Laceration	Problems with genitals/ breasts	**Dentist:** redirect any dental issues to a **dental service**
Possible stroke: face, arm or leg weakness, speech or balance difficulties	Abuse or assault	Allergic reaction non-severe (e.g. itchy rash)	Possible fracture	*New/worsening abdominal pain	**Sexual health:** **www.shl.uk**
Severe head injury	Unable to urinate	Unwell with flu	Foreign body	*New/worsening pelvic pain	**Pharmacist:** In-house: medication queries, acute issues and reviews
Uncontrolled bleeding	New severe or worsening abdominal pain	Patient or carer significant concern	(Can also see any minor ailments if no appointment availability here)	"Vulnerable" patients, learning disabilities or communications difficulties	**Community pharmacy:** (see suitable conditions **on page 16)**. However, allow patients to continue with a request to speak to/see a clinician as this may be the advice they received from the pharmacist.
Suspected poisoning or overdose	New severe headache	Fall		Patient request for F2F appointment	
Semi or unconscious	Severe psychological distress (including suicidal thoughts)	BP >180/110			
Fitting/seizure	Sudden visual disturbance	Swollen or painful leg			
Collapse	Urgent requests from external professionals e.g. district nurses	Visit request			
Call 999 Alert GP	**Urgent appointment** (Even if full) Alert GP to urgency	**Same day appointment** (Use routine slot if available, urgent slot if not)	Offer appointment in urgent treatment centre/ minor injuries unit (except for children <2 years)	Consider **direct to F2F appointment** *Same day	

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Collaborative hubs

How can collaborative hubs support online consultations?

At a collaborative hub, remote triage, online, telephone and/or video consultations are managed centrally by clinicians and administrators working on behalf of a number of practices.

The collaborative hub model supports the delivery of online consultations by enabling patients to consult online with these clinicians.

Collaborative hubs are a way to share workload, resources, bring in additional capacity and optimise the use of people with different skills such as the ARRS roles, community providers and other workforce across a PCN or wider.

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Case studies

Collaborative hub case study
Brent

Collaborative hub evaluation
Lambeth

First4Health case study
Newham

Benefits of collaborative hubs

> Remove burden from practices with limited capacity, particularly smaller sites.

> Ability to expand/share workforce and for staff to work seamlessly from any site creating built-in business continuity.

> Increase closure rate of online consultations.

> Reduce response times.

> Improve patient experience when using online consultations.

> Reduce patient complaint rates.

> Improve staff morale due to a more manageable workload.

> Improve GP and locum retention rates.

Tips for making best use of a collaborative hub

Tips

To avoid extra work being referred back to the practice, collaborative hub clinicians need to be able to access patient records, refer, order tests and prescribe electronically.

Agreed standard operating procedures, clinical protocols and a single source of guidelines, referral forms and local services, reduce clinical risk and allow standardisation of the service.

Having technically knowledgeable administrators and clinicians is key for troubleshooting.

Consider adding a vulnerable patient option to your phoneline to reduce phone call volume, e.g. "Press 1 to be sent an online consultation link or hold to speak to a staff member" and "Press 2 if you are a vulnerable patient and need the support of a receptionist."

Set up a channel for internal communication, such as a chat on MS Teams. Staff can use this to update on progress and highlight any issues.

Patient engagement

Building patient awareness and confidence

Online consultations represent a big shift in how patients engage with healthcare professionals. Some patients may need in-person training and guidance to use them. Others may not have the technology or ability or indeed any interest in doing so. Resources such as the **Inclusive Access Toolkit**, which was piloted in Humberside and North Yorkshire, can support practices to build patient awareness and confidence in using online consultations.

Practices should encourage all patients (or their parents/guardians/carers) to use online triage except where they are unable to do so.

This set of **frequently asked questions**, developed for Elizabeth Avenue Group Practice, may also help.

Tips

Ask patients about their communication preferences and needs to ensure you provide an inclusive and equitable service.

Encourage all staff to promote the use of online consultations at each interaction with patients. E.g. consider using an answer phone message or an agreed script for administrative staff to redirect patients to the online form rather than queuing on the phone; if completing a form on the patient's behalf, ensure staff are familiar with how to do this from a patient's perspective.

Co-produce communications and proactively raise awareness with local diverse and inclusive patient communities.

Use practice, patient and community champions as trusted digital facilitators to provide additional support.

Patient engagement (continued)

Patient feedback

A discussion with your patient participation group, if you have one, can show you whether patients are aware of the availability of online consultations, and how easy the tool is to find and use.

Members of your PPG or other patients can also act as patient champions, testing the system, providing feedback and helping to develop processes, as well as demonstrating to other patients how it works.

Other routes for feedback from patients include surveys, reviews on websites such as Trustpilot, and social media.

Healthwatch

There is a local **Healthwatch** in every area of England. They listen to and share the views of local people to help improve health and care services. As an independent statutory body, they use feedback to better understand the challenges facing the NHS to ensure that both patient experience and standards of care are improved.

Healthwatch research shows that, while remote consultations may be a convenient option for most people, specific groups can experience barriers which inadvertently exclude them. These include deprived communities, people who do not read or write English, and people with learning disabilities.

Healthwatch reports on using remote consultations (right) give valuable insight into people's experiences, and what they do and don't like about online consultations.

Case studies

The Doctor Will Zoom You Now: Getting the most out of the virtual health and care experience – Healthwatch (Jun-Jul 2020)

Accessing your GP remotely – Healthwatch Barnet (Aug 2021)

GP Access Report – Healthwatch Bexley (Nov 2021)

Contacting your GP surgery online – Healthwatch North West London (Feb 2022)

Tips

Set up a mechanism for gathering feedback from patients. This could be a patient feedback form on the website, a follow-up text message upon submission of an online form or informal feedback by patients to practice staff.

Regularly review patient feedback collated by the online consultation supplier system and act on the findings.

Introduction | Optimising workflows | Collaborative hubs | Patient engagement | Online presence | Managing demand | Procurement of tools | Evaluation | Useful resources

Your practice's online presence

The **NHS Long Term Plan** says "People will be empowered, and their experience of health and care will be transformed, by the ability to access, manage and contribute to digital tools, information and services." One key theme is enabling people to access virtual services and information. Practice websites have an important part to play in this. Another is creating a digital NHS 'front door' through the NHS App to connect people with healthcare professionals at the click of a button.

Your website has a crucial role in raising awareness of online consultations and making it easy for people to find and use them.

Website requirements

The **GP contract regulations for 2020** put into law the requirement for all GP practices to have an up-to-date, accessible, and informative online presence, such as a website, and an nhs.uk GP profile page. Practices must review the information available on their website or profile at least once every 12 months. The following **information** must always be kept up to date:

> addresses of practice premises

> telephone numbers

> any other ways that patients access services, such as the link to the practice's online services and video consultations.

Some additional requirements and regulations were introduced in the **GP Contract for 2021-22** (see Annex C).

These include:

> signposting on the practice website to the symptom checker at **111.nhs.uk** and self-care information available at **www.nhs.uk**

> offering and promoting to patients (and those acting on their behalf) access to an online consultation tool and to video consultations

> having prominent links on the website to an online consultation system and other online services on offer

> providing an online facility for patients to inform the practice of their address, contact details or other demographic information and any updates to them. The practice's online consultation tool is one way of doing this.

Further changes in the **GP Contract for 2022-23,** as mentioned in the introduction, include the requirement that practices make all their **directly bookable appointments available online,** as well as by phone or in-person.

Evidence from patients shows that easily understood, up to date information on highly usable practice websites can:

> reduce the number of phone calls to the practice and demand for appointments

> ensure patients are signposted to the correct place for their needs, saving their and practice time

> improve patient satisfaction and experience of using the GP practice, making it more likely they will use digital tools

> reduce the burden on administrative and clinical staff, while empowering patients to manage their health and care

> remove access barriers for patients with disabilities, language barriers, etc, as well as making your website legally compliant

> reduce the risk of adding digital inequalities to existing health inequalities.
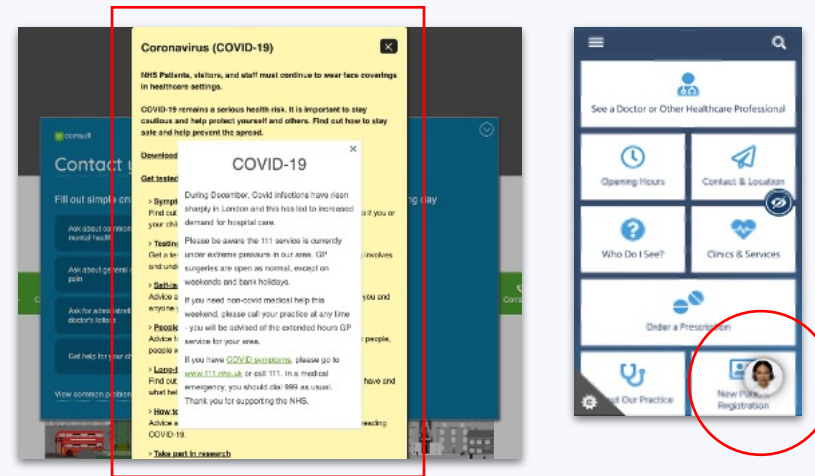
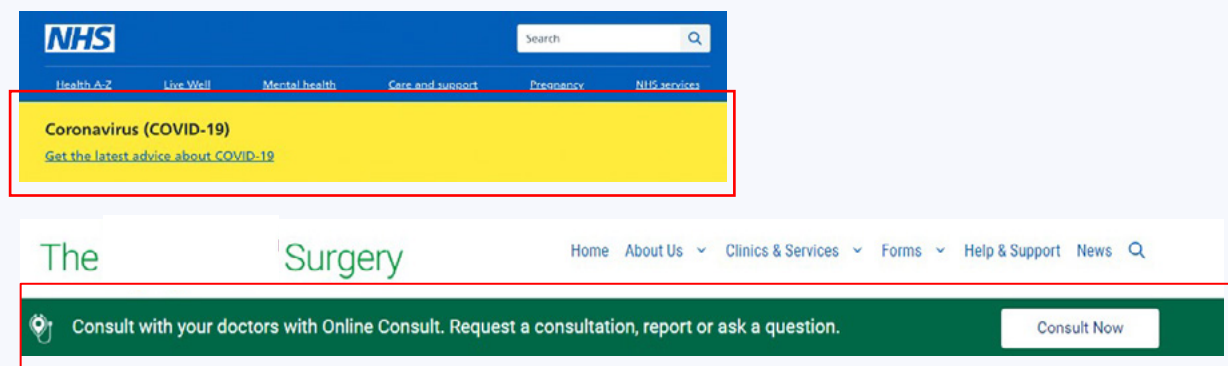# Delivering website requirements – guidance on promoting online consultations

81% of 102 patients looking at 10 GP website templates could not find the online consultation form easily or at all, user research found. It also established that 83% of patients did not understand the term 'online consultation', and many did not realise it involved completing an online form.

Opposite and on the next two pages are are common issues people experience with practice websites along with recommendations to improve usability.

1. Overlays or pop-ups obscure the website homepage and make it difficult for patients to find the online consultations section.

Recommendation: NHS design guidance recommends embedding critically important information within the webpage.

Delivering website requirements – guidance on promoting online consultations (continued)

2. **There is no single, simple invitation to use online consultations and this significantly impacts patients' ability to do so. Using the supplier's name can be confusing, especially when it looks like an advert.**
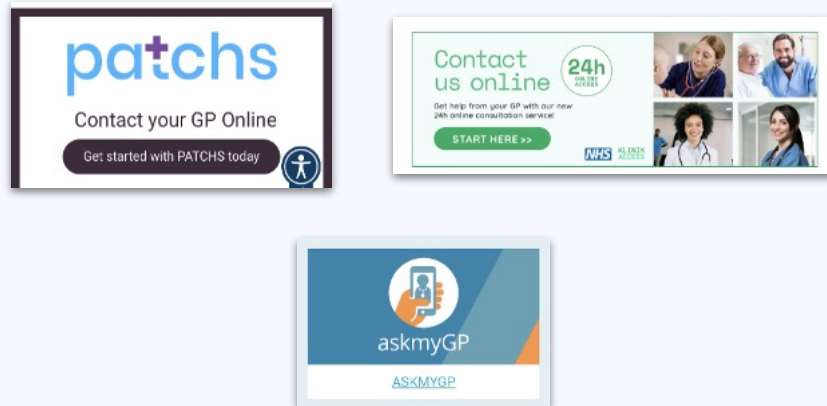

Recommendations:

> Patients often search for how to book an appointment. Try to integrate content on online consultations so it comes up as part of the contacts page and booking tools. For example, it is a good idea to link to online consultations from the appointments section.

> Use consistent wording for online consultations to make it easy for patients, e.g. 'contact your doctors online'

> Avoiding using supplier banners or brand names for online consultation tools – patients think they are adverts or do not understand what they are.

3. **Information about online consultations is not always prominent on the website. Links to the form can often be in a long, unstructured page or embedded in other sections. This makes them hard to find, particularly for those with literacy challenges.**

Recommendations:

> Use clear, bold signage to online consultation tools directly on the homepage. You can also signpost as part of the main menu or via a search box function. Consider which pages are the most visited and signpost people to online consultations from there too.
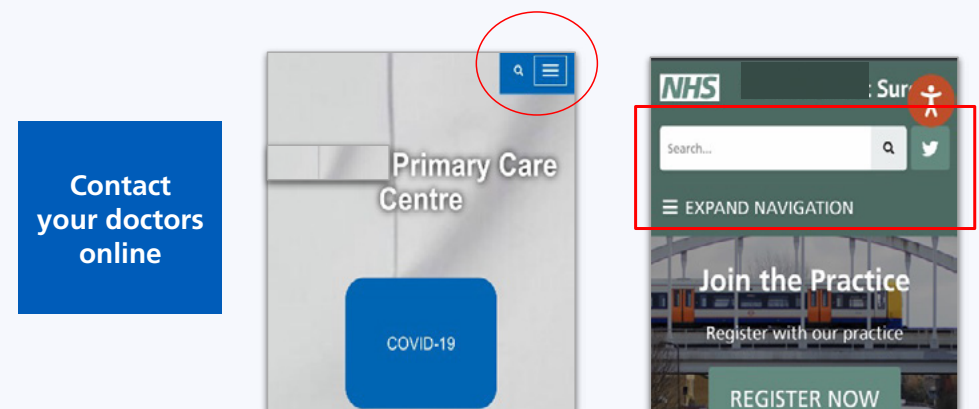
Delivering website requirements – guidance on promoting online consultations (continued)

> Key information and important buttons or links should be clear and in the upper half of the webpage that is immediately visible.
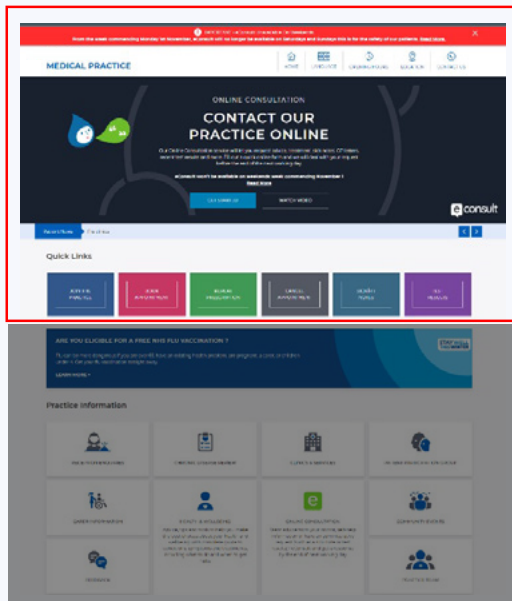
> Outline what an online consultation is, how it works and what to expect. Patient-facing videos can be helpful.

> Ensure the website is optimised for mobile phones and tablets. Check with suppliers that all elements of the site can be viewed on a mobile width screen. Ask patients to test this.

> Use analytics to identify pages that have the least traffic and consider removing them.

4. **Not all GP practice websites' ways of reaching online consultations are fully compliant with Web Content Accessibility Guidelines (WCAG) AA accessibility requirements. It is a legal requirement for NHS organisations to comply with accessibility standards.**

Recommendation: Test and independently audit compliance with the WCAG AA standards. Ask patients with low or moderate digital confidence and literacy to test this for you. Here is some useful information on getting started with accessibility and on getting an accessibility audit.

5. **It can be unclear when patients should use the phone, online consultation forms or direct appointment-booking apps.**

Recommendations:

> Explain how patients should interact with their GP practice:

> > if they have an urgent need

> > if they have a non-urgent need

> > if they need help after hours (when to call 111, 999, visit an urgent treatment centre or access extended hours or the emergency department).

> Promote the use of the NHS App which gives patients access to a range of NHS services, such as booking and cancelling appointments, viewing their GP health record, ordering repeat prescriptions and finding services near them.

> Promote the use of the NHS 111 website at 111.nhs.uk which has a symptom checker.

Guidance on the NHS App

The NHS App, which launched in 2019, has over 30 million users and in 2022 was used by patients to view GP records more than 65 million times and to order more than 22 million repeat prescriptions. It provides a simple and secure way for people to access a range of NHS services on their smartphone or tablet, so they can manage their care at a time and from a place that is convenient for them. The functionality for patients to view and manage hospital appointments on the app is being rolled out across the country. The NHS England Transformation Directorate development roadmap for the NHS App can be found **here.**

Key functionality of the NHS App

Patients can:

- Submit online consultations/book appointments
- Gain access to the NHS Covid pass
- View their GP health records securely
- Order repeat prescriptions and view, set or change their nominated pharmacy, where prescriptions are to be sent
- Manage first hospital or clinic appointments with a specialist, when they are referred by their GP

Further information on NHS App features can be found **here**

Benefits of the NHS App

- 24/7 access from anywhere
- Patients can better manage appointments, reducing DNA rates
- Patients and practice staff spend less time on tasks such as ordering repeat prescriptions
- Patients can access their GP record to view test results and GP consultations, reducing telephone calls to the practice

Using the NHS App

- The NHS has produced training and guidance for GP practices on the NHS App that can be found **here**
- The latest NHS App release notes can be found **here**

Promoting the NHS App

- Resources to help promote the NHS App to your patients are available **here**
- **Video:** How to register with the NHS App
- **Video:** Why I use the NHS App

# Guidance on the NHS App (continued)

NHS App dashboard

The **NHS App dashboard** enables you to see how many patients are using the NHS App and includes figures on registrations, prescription requests, appointment bookings and cancellations. It displays data broken down by ICB, GP practice, and other geographical areas. To request access, please visit **apps.model.nhs.uk/ register.**

Online consultations in the NHS App

Online consultations are now available within the NHS App for GP practices which use certain providers – and NHS England is working to integrate consultation tools provided by other suppliers too. Integration allows patients to complete an online consultation form directly via the NHS App. All personal details are pulled from the NHS record and the online form is submitted directly to the patient's registered GP practice.

Promoting the NHS App

GP practices should encourage patients to download the NHS App to access online services such as online consultations and to switch on notifications so they can receive important reminders and alerts from the practice and other healthcare services. Please make use of **resources** to support promotion of the NHS App such as this **promotional video.**
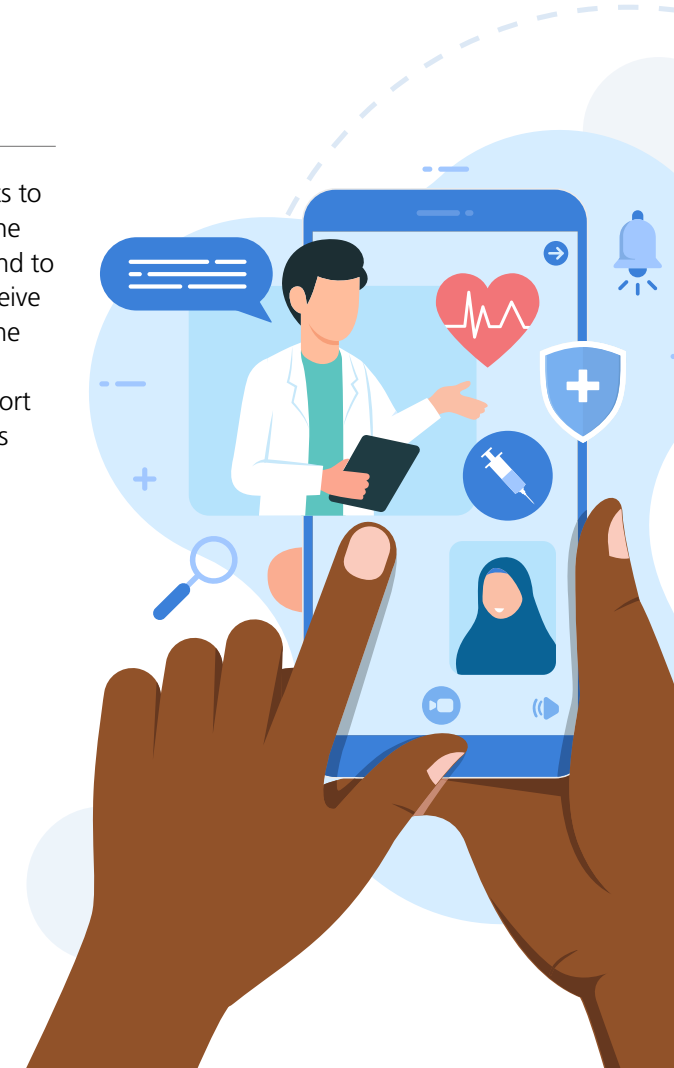
Ideas for keeping your website up to date

Maintaining website content requires ongoing copywriting skills, staff time and resources. PCNs, ICBs and GP federations in some areas have purchased a single web platform to support multiple practices, enabling them to:

> create individual pages of content once for replication on all practice websites

> create suggested content that is shared with practices to customise as they wish

> create unique pages for individual practices

> view analytics at a practice, PCN, ICB or GP federation level, such as user journey, utilisation of online services etc.

Resources:

Creating a high usable and accessible GP website – NHS England

Tips

Make sure your website is easy to navigate for patients

Review the most frequent patient requests you get by phone and see if you can signpost to these services on your website to reduce traffic on practice phonelines

Display self-care resources for patients prominently on your home page

Use back-end analytics to understand patient interaction with websites, e.g. online consultation utilisation, most frequently visited pages, dwell time, abandonment rate etc.

Guidance on social media

Social media is now part of everyday life. Statista's online survey shows **84%** of the UK population are social media users as of January 2023. Although GP practices have lots of ways to communicate with their patients, social media can help you get important information and content out to patients quickly.

A well-maintained social media account can reduce demand on GP practices by providing:

> easy access to information about the practice, such as bank holiday opening hours, online services and vaccination clinics

> information and resources on how to manage health and wellbeing better

> instant urgent communications, such as practice closures or issues with phonelines, that would otherwise incur costs via SMS

> potentially, peer support for patients with specific conditions in moderated spaces.

It is important to note that social media should be integrated into a wider organisational communications and engagement strategy to avoid digital exclusion.

If you do not have your own Facebook page, Facebook may automatically create a profile for your GP practice, without you being aware of it. This could create risks for the reputation of the practice.

By having a managed social media presence, you can respond to comments and feedback, help resolve issues and gain crucial feedback from patients to support continued improvements. If your practice is unable to monitor and respond to comments swiftly, it is possible to switch them off though this obviously removes the opportunity to learn from patient feedback via this route.

The COVID-19 pandemic highlighted the benefits of a virtual presence and making use of different ways of reaching patients such as via Facebook, Twitter, LinkedIn, YouTube, TikTok and Instagram.

| TikTok | Facebook | YouTube | Instagram | Twitter | LinkedIn |

6 w's of Social Media

Why?

> Why do you want to use social media?

> What do you hope to achieve?

> What are your social media goals and outcomes?

Who?

> Who is the target audience that you want to communicate with?

> Who is going to be responsible for managing social media pages?

What?

> What do you want to communicate through your social media platform?

> What is considered a successful social media platform for your practice?

Which?

> Which social media platforms do you want to use? e.g. Facebook, Twitter, Instagram

Where?

> Where will patients find out about your social media channels?

When?

> When will you post on social media?

> Do you know what time your audience is most likely to see new posts?

> When do you plan on responding to incoming direct messages and comments?

Guidance on social media (continued)

Getting started on social media

Think about why you want to do it and what you want to get out of it.

> Review examples of engaging content from other practices to see what works well.

> Identify who can manage the practice's social media accounts – you need at least two people who are trained, and clear guidance to support them.

> Make sure to keep an eye on the practice's social media, checking it on a weekly basis.

> Promote your social media page(s) within the practice and on the website.

> Use social media analytics to gain a deeper understanding of user interaction with posts.

> Never post confidential material on social media.

> Never argue with patients.

> Don't bombard people with lots of posts – one or two a week is fine.

Tips to improve engagement with online consultations through social media

> Promote and signpost patients to your online consultation tool. Use videos and animations to maximise engagement.

> Use the page to engage directly with patients and gather their feedback on the service.

Resources:

Doctors' use of social media – GMC guidance

Primary care social media Toolkit – Redmoor Health

Introduction to social media for GP practices – First Practice Management blog

Ethics of social media use – BMA

Social media for general practices – eGPlearning

Managing demand

Business intelligence tools

General practice is facing unprecedented demand. Having up to date, meaningful and concise information easily available to frontline clinical staff and managers is key to supporting services to cope with these pressures. Online consultations can help to manage workflow. In addition, business intelligence (BI) tools are simple to use, present data clearly and can strengthen both practices' understanding of their local population's health and their ability to manage capacity in a more agile way.

Integrating the BI tool with the practice's GP IT system will enable you to see live dashboards showing demand, capacity, DNAs, etc. This will allow alignment of workforce rotas and identify key gaps in capacity and opportunities to redistribute workload. The tools also provide insight into the types of patients accessing services, the types of services they are using, and how often they attend. This can help shape local strategies and management.

There are a number of different BI tools for practices. Such tools can show:

> consultation data and rates

> referral data and averages

> medications data - acute and repeat

> test request rates

> analysis of workload.

If you are interested in using BI tools, speak to your PCN clinical director or your ICB digital lead.

Procurement of online consultation tools – for commissioners

There is a framework agreement for online and video consultation solutions (DFOCVC) which commissioners are required to use for procurement. It is effectively a shortlist of pre-qualified suppliers. The latest list of suppliers can be found in the **digital care services catalogue.**

This new framework simplifies arrangements for suppliers by creating a single set of consistent requirements and standards for online and video consultation tools. It gives commissioners improved clarity on the product(s) being offered by different suppliers and compliance with overarching standards. The framework also supports greater integration between GP clinical systems and online/video consultation systems. Online consultations and video consultations are treated as separate capabilities and suppliers can offer one or the other or both, and within this there are more opportunities to differentiate products on the functionality they provide.
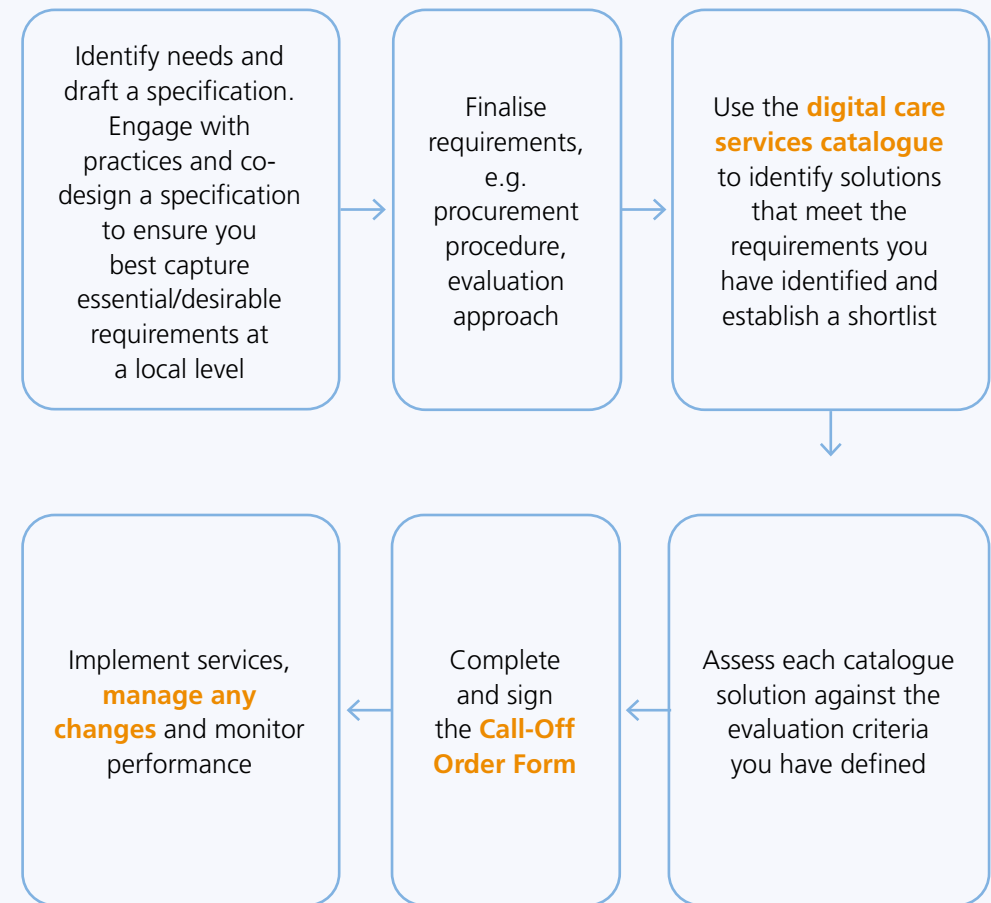
Procurement process

The National Commercial and Procurement Hub offers expert procurement advice at no cost to commissioners. It is a mandatory condition of the online consultations fund that commissioners procure an approved supplier system.

Practices are not expected to research or procure products; the responsibility lies with the commissioners, who must collaborate with their practices and PCNs to understand their technology requirements and then develop a procurement specification with support from the centrally funded procurement hub. Drawing on the hub's experience and supplier knowledge will be helpful when designing and delivering online consultations.

The diagram opposite provides a set of high-level steps that a buyer should follow for a successful procurement. This guidance on **executing a procurement** has additional details.

Tips

Identify needs and draft a specification. Engage with practices and co-design a specification to ensure you best capture essential/desirable requirements at a local level

→

Finalise requirements, e.g. procurement procedure, evaluation approach

→

Use the **digital care services catalogue** to identify solutions that meet the requirements you have identified and establish a shortlist

↓

Implement services, **manage any changes** and monitor performance

←

Complete and sign the **Call-Off Order Form**

←

Assess each catalogue solution against the evaluation criteria you have defined

Introduction | Optimising workflows | Collaborative hubs | Patient engagement | Online presence | Managing demand | Procurement of tools | Evaluation | Useful resources

Tips on procurement of online consultation tools

Hold early supplier engagement events. Pre-procurement supplier presentations are a good opportunity to create discussion and open up possibilities.

Note that solutions can take over six months to embed. It is important that you engage with practices early on so you're ready to implement as soon as you've completed the procurement process and the supplier starts to mobilise.

Involve PCNs, practices and local stakeholders in developing the service specification to ensure buy in, shared objectives and procurement at scale.

Learn from others who have been through the process.

Be clear on your roadmap and what you want from an online consultation tool as this will ensure the supplier adapts their system to meet your needs.

Evaluating and developing your use of digital tools

London Region Online Consultation Dashboard

NHS England - London has co-produced a digital access dashboard to show ICBs, GP practices, PCNs and other analysts how widely digital tools are deployed and used in London. This will enable targeted support for practices which have further to go with implementation of digital tools. Users of the dashboard can see trends at both a regional and local level, which will facilitate conversations.

What can you do with the data?

Datasets are received directly from the online consultation supplier and refreshed on a weekly basis. The dashboard contains different data sources to provide an overview of digital access, such as:

> access to and utilisation of remote consultations, mapped to different demographics such as age/gender/ethnicity

> NHS App registrations

> access to view coded records online

> online repeat prescription ordering

> GP patient experience survey results.

Online consultation activity for London can be shown for ICB, borough, PCN and individual GP practices across a selected time period. The dashboard also visually displays trends in activity.

London region has at least eight suppliers providing online consultation services to circa 1200 practices serving its population. These include, but are not limited to: Accurx, askmyGP, AT Medics (Dr. IQ), eConsult, Egton, FootFall, Patchs and Sensley. The graph on the next page shows the change in online consultation usage per week.

The biggest challenge for online consultation tools across London is utilisation, with 65% of practices reporting fewer than 50 online consultations a week. More than 20% of practices report between 100 and 500+ online consultations a week.

Dashboard data on uptake of online consultation tools, week by week

Group ● 0 ● 1-19.9 ● 20-49.9 ● 50-99.9 ● 100-199.9 ● 200-299.9 ● 300-499.9 ● 500+

Count of Practices (in Utilisation Group)

05/09/2022, 12/09/2022, 19/09/2022, 26/09/2022, 03/10/2022, 10/10/2022, 17/10/2022, 24/10/2022, 31/10/2022, 07/10/2022, 14/11/2022, 21/11/2022, 28/11/2022, 05/12/2022, 12/12/2022, 19/12/2022, 26/12/2022, 02/01/2023, 09/01/2023, 16/01/2023, 23/01/2023, 30/01/2023, 06/02/2023, 13/02/2023

Introduction   Optimising workflows   Collaborative hubs   Patient engagement   Online presence   Managing demand   Procurement of tools   Evaluation   Useful resources

Digital Journey Planner

The **Digital Journey Planner** (DJP), developed by **Redmoor Health** with the NHS England Digital First Primary Care team, is a web-based self-assessment tool to help practices identify their current use and understanding of digital tools, discover new digital opportunities and technologies, solve issues and map a clear path to getting the best out of digital technology for the practice and patients.

It aims to empower staff working in general practice. It is not designed to be a measure of performance.

How does it work?

You access the DJP by creating an account using your practice ODS code **here.** The tool is based around subject-specific modules, each using a step-by-step approach: baseline, learn and improve.

Each module consists of assessment questions and should take no more than 30 minutes to complete. It generates an action plan based on your answers. After implementation, you can complete the module again to see how your score has improved.

Modules

The first module launched is **'Patient Communications'** which has help and advice on practice websites, social media and messaging. NHS England has approved and purchased this module which is therefore free for all GP practices in England to use.

The **'GP Online Services'** module focuses on patient-facing services such as registering patients online, appointments, online access to care records and prescriptions, as well as proxy access. The 'Online Consultations' module supports practices to plan their online consultation system, prepare their team for delivery and communicate with patients about how to use it effectively. Both modules require subscription to Redmoor's enhanced level of service.

DJP Resources

> More information and webinars on the **Digital Journey Planner**

> London region **Digital Journey Planner Webinar** - 31 March 2022

> **Digital Journey Planner FAQs**

The assessment stage - Baseline

- Improve your collective knowledge through information, hints and tips for good practice and benefits

- Different staff can contribute to the assessment, save and exit

- Some learning resources are displayed along the way

Gather the knowledge - Learn

- Questions identify key building blocks of digital progress

- Each section will describe benefits for practice and patients

- Improvement plan is for practices to use internally with staff or share with commissioners and regulators

Create your action plan - Improve

- Use the report to assess your digital progress

- Agree priorities for your practice and your patients

- Visualise utilisation within your practice and collectively agree improvement areas

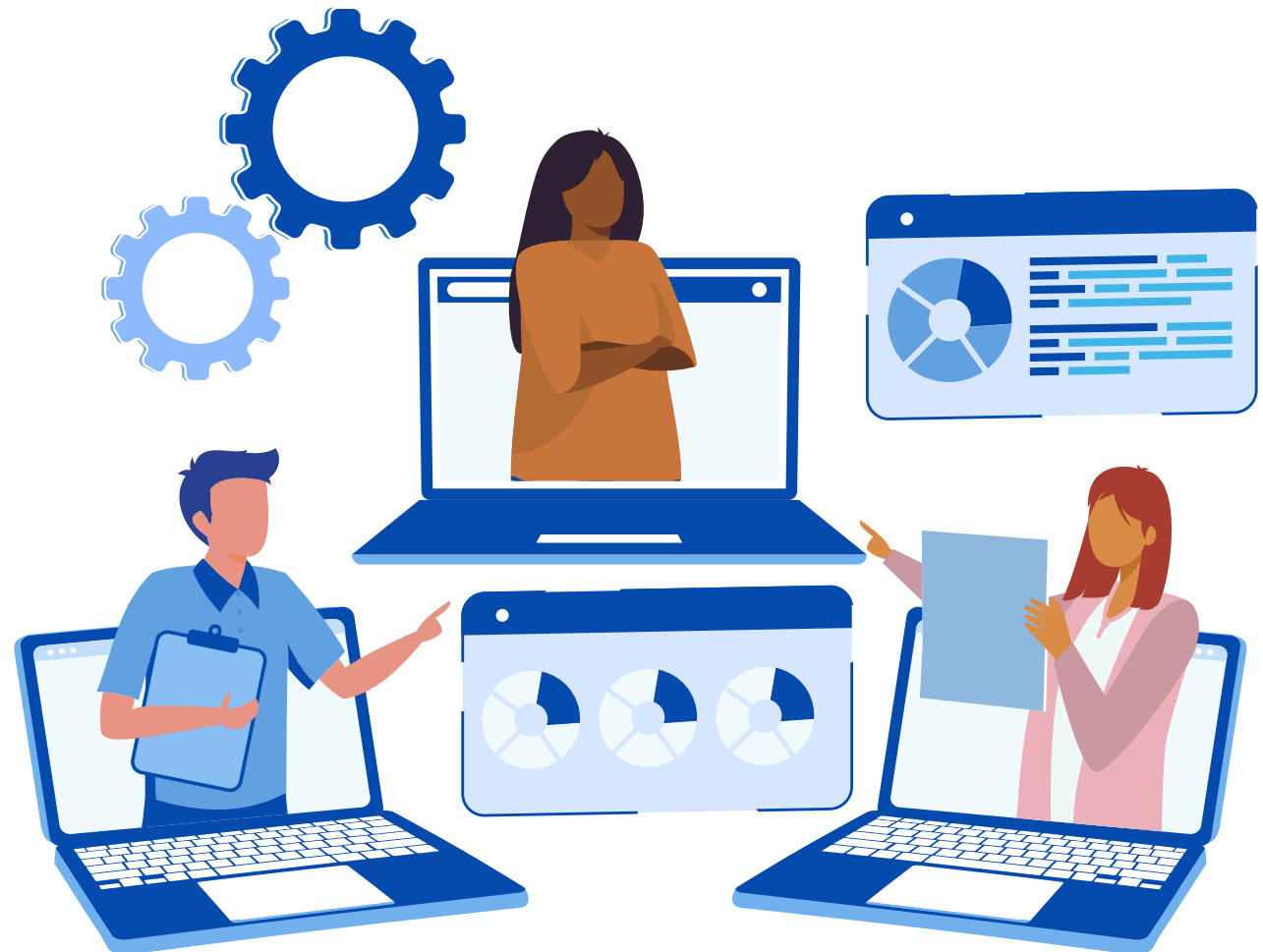- Identify resources needed to implement

Useful resources

Resources:

Using consultations in primary care implementation toolkit – NHS England

Checklist for choosing an online consultation platform – BMA

Remote consultations guidance documents – RCGP

Dealing with increased demand for online consultations – Redmoor Health