

## Communications and Engagement Toolkit

Introduction	2
Updating the Practice Website	2
Updating the Telephone Messages	2
Training Staff	3
Understanding the Patients' Perspective	3
Promoting Engage Consult to Patients	3
Specific Patient Cohorts	3
Promotional Media	4
On the Phone	4
Social Media	5
On your Website	5
Newsletters	6
Printed Materials	6
SMS	6
Reception Monitors	7
Involve the PPG	7
Appendix A - Example Telephone Messages	7
Appendix B - Social Media Messages	8
Appendix C - Sample Website Text	8
Appendix D - Sample FAQs	9
Appendix E - Top 10 tips for promoting Engage Consult	12
Appendix F - Top 10 tips for video consultation	15

## Introduction

Key to making a success of any change is ensuring that the people affected by the change are kept well informed of the change. If you want online consultations to be a success at your practice then you need to plan how you're going to communicate the benefits of the service, particularly to staff and patients. From our experience deploying many instances of the service we know the following three things will have the greatest impact on whether the service is used:

1. Make sure the banner for online consultations on your website is very obvious and very easy for patients to find. This is as important for how your website appears on mobile devices as it is if you're looking at it on a large monitor.
2. Update your telephone messages to include information about online consultations.
3. Make sure your staff are trained to use the Engage Consult client and understand how to use it.
4. Make sure your staff understand how to use the service as a patient.
5. Get your staff to promote using the service to your patients.

While the first four items on this list are relatively easy to achieve, the final item will take more time and effort. With this in mind the majority of this document is aimed at helping you achieve the final item on the list (while not ignoring the other items).

## Updating the Practice Website

The key point about this is to make sure that when patients arrive at the practice website, regardless of what device they're using (mobile or large monitor) they can see the banner to click on straight away.

Instructions for how to put the banner onto your website are provided but you'll need to make sure the person or company that manages your website puts the banner in a good position.

## Updating the Telephone Messages

If your telephone system allows you to play messages to patients then you should include messages about Engage Consult. The key messages you should consider (if you have them) are:

- The welcome message

- The queue entry message
- The on hold message

You may not have all of these. Some examples of how you might communicate the availability of online consultations are included in Appendix A at the end of this document.

## Training Staff

Making sure staff know how to use the service is critical to the success of any service. If people know how to use it, and feel confident using it, they're more likely to derive a benefit from it which in turn means they'll be more willing to use it. In turn they'll encourage patients and carers to use it.

Engage Health provides training during the implementation process which is focussed on making sure each role knows how to use the service to their benefit. Remember to add training as part of your induction for new members of staff and also that Engage Health can provide training at any time while you're using Engage Consult. There are also training videos available [here](#).

## Understanding the Patients' Perspective

If staff are going to actively promote a service to patients they need to understand how it works from the patients' perspective. As part of the deployment you'll be provided with a link to a test site which staff can use to send online consultations as if they're the patient. This way they'll get to understand it from their perspective. There's also a video available which shows the patient journey available [here](#).

We provide some key messages which staff can use when they're talking to patients about the service. Of course, you don't have to use these but they're there if you want to.

## Promoting Engage Consult to Patients

### Specific Patient Cohorts

Consider if there are particular patient cohorts that might benefit from being able to send an electronic request rather than having to phone or come in to the surgery.

- If you have any care or residential homes (including homes for people with learning disabilities) in your area talk to them about using online consultations. Some practices are seeing significant efficiencies when care homes use the service. Best of all it saves the care home and the practice time.

- Patients with hearing impairments.
- Patients with limited mobility or that are housebound.
- When it's cold and icy are there particular cohorts of patients that might prefer to use the service.
- Would patients with anxiety issues prefer to use online consultations. Some patients like to use the service because they can take more time to consider their answers to the questions and don't feel rushed.
- People whose first language isn't English can benefit by having a friend or relative help them complete an online request.
- If a patient with a skin condition, burn or rash phones, think about asking them to send an online consultation with a photo attached.

### Promotional Media

There are various ways you can promote the service to patients:

1. Face to face
2. On the phone
3. Social media
4. On your Website
5. Newsletters
6. Printed Materials
7. SMS
8. Reception Monitors

### Face to Face

There will be occasions when you can promote the service to patients face to face. For example if patients are enquiring about registering for access to your clinical system online you could tell them about online consultations.

If patients are being seen by a clinician who has to refer them elsewhere it might be appropriate for them to mention using online consultations so next time they can make sure the patient sees the right person first time.

You might want to let parents with young families know about the service or people who have mobility issues. Working people can find it difficult to visit the practice, or get time off to attend, so being able to make sure they need to attend by sending an online consultation first can be seen as a benefit by them.

### On the Phone

One of the best times to promote online consultation is when someone rings the practice for an appointment. So it's a good idea to brief staff answering the phone to offer online consultation. For example...

"We can offer you an appointment next Wednesday but you can start an online consultation straight away by visiting our website. One of our GPs and/or nurses will review the information you give us and respond (today)."

"We can offer you an appointment today but next time you might like to try an online consultation which can save you coming into the practice. One of our GPs and/or nurses will review the information you give us and respond (the same day)."

If your patients experience a long waiting time on the phone and they complain it can be an ideal opportunity to tell them about online consultations. If someone phones in but doesn't want to talk to your reception team about their condition they might be happy to send an online consultation instead.

### Social Media

If you have social media accounts for the practice, use them to promote online consultations prior to its launch and after. After all, if someone's using social media they know how to use online services and will probably appreciate being able to use them. There are some examples of what you might say on social media in Appendix B.

### On your Website

Include a news article about online consultations before it launches and consider more news articles in the months following launch with stories about how patients have benefited from using online consultations.

Have a link from your Appointments page asking people to send an online consultation first. Have some text on your New Patient Registration page explaining that you use online consultations and encourage patients to use it to contact the practice.

Create a Frequently Asked Questions page and link people to it. See Appendix D for some sample questions and answers.

Prior to launching, put some text on your homepage where the banner will be, explaining what you're doing and what the service is for. Link to the FAQs you've created. When you launch, have some text next to the banner explaining what it is and how to use it.

See Appendix C for sample text for your website.

## Newsletters

If you have a newsletter, add something to it before launch, and have stories about how patients have benefited from it after launch. Here's a suggested newsletter article:

### Save Time and Consult with us Online

Patients can now consult our practice online as part of a new service which could save time and a journey. The service is free and confidential.

You can input your symptoms online and will **receive a response from our practice - usually that day, if a request is received within the Online Consultation daily response window**, and will be either given advice, directed to other sources of support such as the pharmacy, receive a telephone consultation or, if necessary, booked in for an appointment. You'll also have access to reliable and trustworthy self-help generic information 24 hours a day, 7 days a week that may help you to avoid an appointment altogether. You can also use the service to request **test results, sick notes, referral letters and medical reports**.

To use online consultation please go to [www. \(insert web address\)](#)

## Printed Materials

Print off the leaflets on the support portal to hand out. Make sure these are prominent and available to patients. Actively hand these out to patients when patients turn up for an appointment or are speaking to your receptionists.

Include a leaflet with all printed correspondence you send to patients. Put leaflets in your new patient registration pack.

## SMS

Send a SMS to patients when you launch and for a few weeks after to tell them about the service. A lot of patients will probably have smartphones so will be able to access the service directly from their phone. Here's a sample text message:

You can now consult with our GP Practice online. Input your symptoms and get a response the same day. It's simple, safe and personal. Click here (insert service link)

## Reception Monitors

We provide a video for you to add to your reception monitors so patients in your waiting area can watch it while they're waiting. It's been designed so there's no need for people to be able to hear it.

## Involve the PPG

Get the PPG involved. Hold a special meeting for members to learn about the new service. Ask if members could:

- use the service themselves and give feedback to the practice
- develop an online champion who can support others to use the service
- promote the service to patients through events, demonstrations, develop appropriate publicity
- include questions to evaluate online consultation/measure awareness in any PPG survey

## Appendix A - Example Telephone Messages

### Welcome Message

Quite often practices now have a care navigation message as part of the welcome message and within that there's usually a point where the message states that if the patient doesn't want to talk to the staff about their problem/condition then they don't need to. Consider adapting this part of the message to ask patients to send an online consultation instead.

... if you don't want to tell our team what's wrong with you please consider sending an online consultation instead. This will be reviewed by appropriately qualified member of staff and we'll get back to you in an appropriate time.

### Queue Entry Message

If you've got one of these messages it probably goes along the lines of explaining to patients that all your staff are busy and you'll answer their call as soon as possible. Consider changing the message to suggest the patient try using online consultations instead.

All our receptionists are busy at the moment. We now offer online consultations which you can send to us 24 hours a day and it will be reviewed as soon as possible but no later than the next working day. Please visit our website and click on the link to send us a consultation or ask our receptionists if you want more information about using this service.

## On Hold Message

Change this message to ask patients to consider using online consultations instead.

We're sorry we haven't answered your call yet. We'll get to you as soon as possible. In the meantime did you know you can now consult with us online. You can send us a consultation 24 hours a day and it will be reviewed as soon as possible, but no later than the next working day. Please visit our website and click on the link to send us a consultation or ask our receptionists if you want more information about using this service.

## Appendix B - Social Media Messages

If you use social media it's a great way to get the message out to the people who are likely to use online services. Here are some example messages:

- Can't get a GP appointment? Use online consultation to get same day online advice and treatment
- If you shop online you can consult online
- Fed up with waiting to see your GP? Use online consultation to get same day advice and treatment from your GP Practice
- Be prepared as summer approaches use online consultation to get same day online advice and treatment from your GP Practice
- No time to visit your GP? Use online consultation to get same day online advice and treatment from your GP Practice
- Need medical advice or treatment before the bank holiday? Use online consultation to get same day advice and treatment
- Busy at work or Uni? Use online consultation to get same day online medical advice and treatment from your GP Practice

You can also adapt some of the messages you put on your website for social media.

## Appendix C - Sample Website Text

If your practice hasn't used an online consultation service before it can be helpful to patients if they know why you've introduced one. You can adapt this message for pre launch and after launch:

### Online Consultations

We've introduced an online consultation service so you don't always need to come into the practice to get our medical expertise. Why not save time and try



our new online service. You can input your symptoms online and will **receive a response from the practice - usually that day, if a request is received within the Online Consultation daily request times**. You will also have access to reliable and trustworthy self-help generic information 24 hours a day, 7 days a week that may help you to avoid an appointment altogether. You can also use the service to request **test results, sick notes, referral letters and medical reports**.

Online Consultation – It's Simple, Safe and Personal

### Appointments page

You don't always need to come into the practice to get our medical expertise. Why not save time and try our new online service. You can input your symptoms online and will **receive a response from the practice- usually that day, if a request is received within the Online Consultation daily request times**, and are either given advice, directed to other sources of support such as the pharmacy, receive a telephone consultation or if necessary booked in for an appointment. You will also have access to reliable and trustworthy self-help generic information 24 hours a day, 7 days a week that may help you to avoid an appointment altogether. You can also use the service to request **test results, sick notes, referral letters and medical reports**.

It's easy to get started, just try it and you might save yourself time and a journey. Click on this link to try the service (**insert service link**)

### Registration Page

As part of our service we offer online consultation. You can input your symptoms online and will **receive a response - usually that day, if a request is received within the Online Consultation daily request times**. You will either be given advice, directed to other sources of support such as the pharmacy, receive a telephone consultation or if necessary booked in for an appointment. You will also have access to reliable and trustworthy self-help generic information 24 hours a day, 7 days a week that may help you to avoid an appointment altogether. You can also use the service to request **test results, sick notes, referral letters and medical reports**. It's easy to get started, just try it and you might save yourself time and a journey. Click on this link to try the service (**insert service link**)

### News page

#### Consult with us Online

Did you know you can now consult with our GP Practice online? You can input your symptoms online and will **receive a response - usually that day, if a request is received within the Online Consultation daily request times**. You will

either be given advice, directed to other sources of support such as the pharmacy, receive a telephone consultation or if necessary booked in for an appointment. You will also have access to reliable and trustworthy self-help generic information 24 hours a day, 7 days a week. You can also use the service to contact us about **test results, sick notes, referral letters and medical reports**. It's easy to get started, just try it and you might save yourself time and a journey. Click on this link to try the service ([insert service link](#))

## Appendix D - Sample FAQs

### What are Online Consultations?

Online Consultations is a secure service provided by your practice that gives patients the opportunity to request help for a non-emergency medical problem or other practice matter at any time, even when the practice is closed. You'll usually receive a response the same day but sometimes it might not be until the next working day. This means that if you wish to contact the practice out of hours, on a Sunday for instance, with a request which does not require an immediate or emergency response, you can send your request and you will be contacted once the practice is next open and the request has been reviewed.

### What kind of question can I ask?

You can ask anything that doesn't require an immediate emergency response. There are generally two categories of question:

1. An admin or other query, for instance: "have you sent the letter for my referral yet" or "I haven't heard about my appointment with the diabetic nurse yet, can you help?"
2. A request for help with a non-emergency medical problem. If you select this option you will be asked to enter the reason you are requesting help e.g. sore throat, back pain etc. and then you'll be asked a series of relevant medical questions. The answers to these questions will provide very useful information to help the GP or practice nurse decide what to do next in order to help you best.

### What happens if I cannot find a suitable subject?

In the unlikely event that you're unable to find a match for the problem that you enter, you'll be prompted to send a simple message about your issue. You'll then be contacted to discuss your request as though you'd completed a questionnaire.

### Why is this service better than just speaking to the doctor or nurse?

Giving the GP or practice nurse the opportunity to review and think about your problem and list of symptoms before discussing it with you will enable your

doctor or nurse to be better prepared and can lead to a more efficient resolution of your problem. There's also evidence that providing the information and being stimulated to think about the medical issue by the questionnaire is a positive experience for patients.

### How do I know how long the questionnaire will take?

It's difficult to predict how long individual questionnaires will take to complete as each question you're asked depends on the answer you gave to previous questions. Most questionnaires are completed within 5 to 10 minutes, however, if your problem is particularly complex you may find that it takes longer than this; please bear with the process though as the information will be very useful both to you and the GP or practice nurse who'll be treating you.

### Why can't I have a response by email?

The NHS doesn't encourage the use of email between medical professionals and patients as personal email addresses outside of the NHS are not necessarily secure, this means that your information may not remain private. We take your privacy very seriously. It is true that some patients have private arrangements with their doctors which means that they use email, this is entirely between you and your doctor.

The online consultation service we use provides a messaging system so that you can have a secure and private electronic discussion with your general practice instead. You need to create an account with the service to make this option available to you and the practice.

### What happens to the information gathered?

Any information gathered is sent directly to your practice. This will then be handled within the practice in the same way as any other information patients provide and will be subject to the usual privacy and security rules. The information you enter, in a totally anonymised fashion, may be used for service improvement however it will not be released to any third parties or be kept in an identifiable format.

### I have heard that doctors are encouraging people to "self-care" and I wonder if online consultation can help with this?

We would always encourage people to search out information to help themselves with medical problems where appropriate. We'll provide links to established and reliable sources of medical information which you may decide to use either to help with an existing medical problem or to deal with a new medical problem. Online consultation provides an efficient method of asking for non-emergency medical help from your General Practice so, if you do

decide to self-manage a problem you can do so, safe in the knowledge that should you wish to ask for help or advice you'll be able to get a response.

**Does the service use artificial intelligence to decide on a course of action?**

No. The consultation you send is always reviewed and assessed by an appropriately qualified member of our team. If you send an administrative consultation this will be one of our administrative team who may then discuss this with a clinician (e.g. if you ask when your repeat prescription will be ready they may need to check with a doctor). If you send a medical consultation this will always be assessed by an appropriately qualified clinician.

**Am I able to ask for a response from a particular GP or nurse?**

Generally, yes. Most practices who use Online Consultation list the GPs and other staff who are available and there's an option for you to choose who you would like advice from. Obviously, it's impossible to always guarantee a response from a named individual as they may not be available. In the event that the person who you have asked for is unable to respond then you will hear from the practice anyway.

**How do you know the identity of the person sending a message?**

Practice staff will identify patients and their carers when they review the information sent to the practice, which includes patient (and carer) identifiable data - name, date of birth and phone number, comparing this against that held in the patient record, along with other useful information such as the problem identified or additional comments made in the submission. If they feel they need to contact the patient or carer to verify the patient's identity, they will. This is no different to current practice and is taken very seriously. If at any time the practice staff are unsure of the identity of the person being spoken to, they will be asked to attend the practice in person.

## Appendix E - Top Ten Tips for Promoting Engage-Consult

### 1 Website & Banner Placement: Top

- Ensure the online consultation banner is prominent on the homepage of your website.
- Check that the banner is clearly visible from all mobile devices
- Ensure that there is some text alongside the banner explaining to patients what to use the service for and a link to the 'Patient User Guides'
- Write an article for your website listing the benefits for patients of using the service over the more traditional ways of contacting the practice
- Move your practice telephone contact details from the home page to a 'contact us' page

- Use the EC Patient Portal to add links to other local services, online repeat prescription ordering and for completing your online web forms

## 2 Staff promotion:

Your staff are your greatest asset. The reception and admin teams will have the most daily contact with your patients so use them to promote Engage Consult at every interaction with a patient whose care could have been provided online. Take the opportunity to thank patients for using the application at every interaction.

Ask your staff to help patients to create accounts or submit online forms as part of your total triage process. Consider asking patients who are calling in for telephone triage to create an Engage Consult account and submit an online medical questionnaire before being added to the doctors call back list. This will provide the doctor with useful information before the call-back.

Don't forget there will be a cohort of patients that cannot or will not use online applications, therefore use your staff to help patients to submit their message using 'proxy' access as an alternative option.

## 3 Practice Telephone Messages:

- Ask your senior partner to record your telephone message
- Make the online consultation message clear at the start of your welcome message.
- When giving the website address do this slowly & repeat so patients have time to note the address
- Call queuing message - remind patients to use EC for all admin and medical messages to save them time waiting in a phone queue
- Include in the message advising patients to use EC to send in any admin enquiries

## 4 Promotion, Promotion, Promotion:

- Practice Newsletter
- Add patient user guidance to your website
- Use your TV waiting room media to display messages about the 'new' online consultation process
- Review your waiting room notice boards and walls. Remove outdated material, do a display about online consultation using the EC logos & banners that you have on your website
- Put the EC pull up banner in a prominent position in your waiting area
- If your practice provides patient wifi access add something to the landing page with a link to your website

- Update your new patient information pack with information on the new consultation process
- Don't do one campaign to promote the service, repeat the messages throughout the year as part of your engagement plan

## 5 Improved Patient Medical Information:

When asking patients to get back in touch, tell them to use Engage Consult to provide you with this information. You can also ask patients to use the 'Upload Health Data' option for blood pressure recordings daily if doing hypertension checks rather than patients uploading or bringing in documents.

To encourage your patients to complete the medical questionnaire consider moving the ICE/custom questions to 'after the questionnaire' in Engage Consult settings.

## 6 Social media:

- Update your practice Facebook page to promote EC
- Post updates on Twitter and LinkedIn
- Start a 'blog' on your website
- Share EHS posts on your practice's social media platforms

## 7 SMS/MJOG messaging:

Review your registers and send out targeted promotional activity to patients with;

- long term conditions
- a physical disability
- deaf & hard of hearing
- anxiety and stress related illness
- carers

If you are responsible for a care home and their residents then ask them to use EC to send in their clinical messages and use video consultation for MDT/ward rounds or patient consultations.

## 8 Respond promptly to messages:

Patient satisfaction will ultimately drive use. Doing what it says on the tin i.e. responding more quickly to requests from patients and keeping to the promised times in your response window will all have positive effects on your patients satisfaction. The patient will get the right advice, from the right professional at the right time.

## 9 Patient Voices:

Engage with your Patient Participation Group as early as possible in your implementation process. Ask if they would help to promote the system; patient testimonials are a powerful way of encouraging others to use the system.

Consider contacting patients from your long term conditions registers or disabled patients who have used EC online for feedback that can be used on your website or practice newsletters.

Support patients who are struggling to use online services to create accounts and sign up to the NHS App, making sending in messages to the practice quicker and easier. Address any patient concerns or problems encountered in using the system quickly.

#### 10 Email Signatures & Letterheads:

- Update your practice email signatures and out of office messages to promote your online consultation.
- Add EC details to letterheads

## Appendix F - Top Ten Tips Video Consultation

1. Ensure that you are familiar with the Engage Consult Video application. The Engage Consult report contains information rich clinical data that will save you time during the consultation, so reading the report before commencing the video consultation is very important
2. Make sure you have a good connection. Test the sound and video quality before commencing your video consultations, it is advised to have your screen in the landscape format and not portrait.
3. Put a ***'do not disturb, video consultation in progress'*** sign on your consulting room/office door
4. Check who you are speaking to and how they would like to be addressed. Check with the patient that they can see and hear you clearly. Ensure that you have alternative contact details should there be any technical difficulties
5. Keep eye contact wherever possible and ensure that you demonstrate that you are listening carefully to the patient even when taking notes
6. Watch out for verbal and non-verbal cues from the patient
7. Allow time for the patient to ask questions
8. Summarise the conversation and repeat back to the patient to ensure they are clear about the discussion, offering the patient the opportunity



to clarify if needed your assumptions and for you to 'safety net' the consultation

9. Explain the 'next steps' to the patient, and thank them for attending the consultation
10. Complete your comprehensive consultation notes within the clinical system. Note if there was a carer or chaperone present at the video consultation within the medical notes