

## Engage Consult - Online Consultation Service

### A Guide for Care and Residential Homes

#### Section 1

#### Introduction

Engage Consult is an online consultation service which is provided free of charge to residents in Care or Residential Homes who are patients of GP Practices signed up to use the service. It allows Care or Residential Homes to submit online non-emergency medical and administrative requests to the resident's GP Practice. The GP Practice will provide a timely response either via the secure messaging service or by phone, from the most appropriate person. This could be from the GP, nurse practitioner, administrator or other team member.

The Engage Consult service is provided by the resident's medical practice. The system can be adjusted to fit practice needs, therefore before starting to use Engage Consult, please contact the Practice Manager to discuss the Practice's preferred options for use. Please note that not all Practices use Engage Consult.

In this document the term Care Home refers to Care Homes and Residential Homes.

How does it work?

- Individual medical or administrative queries can be sent directly to the resident's GP Practice via the Engage Consult website using a secure online messaging service. These queries can include requests for medical advice from a GP or other clinician, administrative queries such as medication requests and reviews, or advice from the Practice administrative team. Requests can be submitted at any time of day or night. New medical symptoms can be recorded via a series of questions to enable a thorough record of the patient's medical problem. If necessary a photograph or document can be attached to support the information given, for example to show skin rashes or to send letters and reports.
- A 2 way messaging service allows the practice to respond online. If necessary the Practice will phone the Care Home to discuss the request.
- Each Practice will display their response times once you have submitted a request. Often they reply within a couple of hours. Generally, Practices do not offer online consultation services at the weekend.

It is preferable to submit your request as early as possible so that the GP Practice can provide a prompt response. Many Care Homes submit their requests during the night shift so that Practices are able to action the request first thing in the morning.

Please note

- Engage Consult must not be used for medical emergencies such as chest pain, loss of consciousness or profuse bleeding.
- If you submit your request outside the "Same day response time" you may not receive a response until the next working day. This is at the discretion of the Practice.
- When using Engage Consult it is not acceptable for staff to use their own personal devices such as mobile phones, tablets or laptops to submit information, take or store photographs, download the consultation or reply to messages. Please ensure that any device used is registered for Care Home use only.

What are the advantages for the Care Home?

- Engage Consult can enable a Care Home to receive a prompt response to a medical query so that if necessary, treatment can be started quickly thus reducing the escalation of symptoms. It is hoped that, when used efficiently, it can help to reduce the risk of A&E attendance and hospital admission.
- Greatly improved communication between the Care Home and Practice. A huge reduction in the amount of time spent on phone calls allowing more time to be spent directly with residents.
- The request can be made at a time which is convenient to the Care Home. For example it can be submitted overnight so that it is with the Practice when it opens in the morning. There is no need to ring the Practice at 8.00am. The response from the Practice will be sent out within the agreed response time and can be accessed by the Care Home at a suitable time.
- Any message sent or received through Engage Consult, including the medical questionnaire (Instant Medical History), can be saved and/or printed and

transferred to the resident's records.

- The Engage Consult service provides an audit trail of activity by the Care Home and clarifies when a response was sent by the Practice.

## Consent

When a patient moves into a Care Home there are registration procedures for the patient to give consent for the Care Home to act on their behalf with regard to their medical care. In a Residential Home or for residents receiving Respite Care, the arrangement may differ. Consent may already be documented at the resident's GP Practice, but if not, it must be confirmed with the Practice in advance as it will be checked when you submit your online request.

## How to use this Guide

This guide is divided into 4 sections. You may choose to use specific sections with different staff groups. Each section can be printed as a separate document.

- Section 1 - Introduction
- Section 2 - Registering the Care Home as an Engage Consult User.
- Section 3 - How to add or remove a resident from your Engage Consult Account.
- Section 4 - How to send a request to a resident's GP practice

If you have a technical problem with Engage Consult please report it to the Practice you are trying to contact. They may be able to resolve your query, but if not they will forward it to the Engage Health Support Team.

The Engage Consult programme is frequently evaluated and improvements made. If this guide becomes out of date please contact your GP Practice to ask them to request the most recent version.

## Section 2

### Registering the Care Home as an Engage Consult User.

To set up the service you need to decide on your username and registration details. Each resident who is registered to that specific GP Practice is added individually, and any online request for them is submitted under that username and password. The username can be the Care Home Manager's name and date of birth, it could be a specific team name or the Care Home name with an agreed date of birth.

You will need a contact email address, preferably a generic mailbox which is easily accessible to appropriate staff members. This is where you will receive notifications to tell you to login to Engage Consult to receive your response from the Practice. One email address can be used for several usernames, the email received specifies which username account the message is relevant to.

The request can be sent at any time and the response received within Practice working hours. For your staff to be able to access the service over a 24 hour period, several senior staff members across different shifts patterns must be able to access the system under the same username. Please note that staff using Engage Consult will have access to confidential medical information and must adhere to patient consent procedures. It is recommended that the Senior Manager has responsibility for setting and authorizing use of login details, and for resetting passwords. It is recommended that there is a register of those staff who have knowledge of the username and password, and these login details are not shared within the wider team. Within the Engage Consult service there is a free text section at the end of each request where staff members should record their own name. This enables an audit trail of activity.

Please note that it is possible to add the same patient under more than one username. This is not advised, there is the risk that messages and advice will be missed.

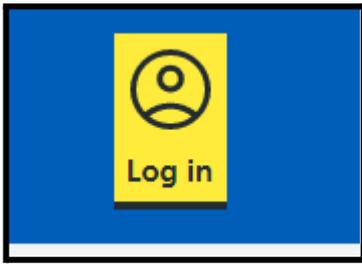
Consent. Please ensure that the Practice Manager knows that the username you are acting under is from your Care Home. They will need to verify this relationship to ensure that all consent requirements are fulfilled.

### To Register the Care Home Account with Engage Consult

#### **Step 1**

Visit the resident's GP Practice website and Click on the Online Consultation banner or Engage Consult logo. This will vary according to the Practice.

Click to 'Log in' in the right hand corner.



Click to use Engage Consult account.



### Step 2

Sign Up under the chosen username, please refer to the above information. Remember that to access the reply from the Practice there must always be somebody on duty with login details to retrieve the response.

**What is your name?**

Forename

Surname

**Continue**

Click Continue. Please enter the date of birth you have associated with that username, a gender, and the exact postcode of the Care Home.

### Step 3

You are asked to enter a phone number for Care Home use only.

### Step 4

Work through the following screen ticking the boxes and accepting the End User Licensing Agreement Policy.

### Step 5

Enter the email address you wish to use for Engage Consult. This must be a mailbox which is easily accessible to all staff members who will be signing into Engage Consult. It must not be an individual's email account.

Note: Please untick the box "Use email address as my username" and add the username you have chosen. This username needs to be unique. When you press "Continue", an email will be sent to this email address with a one time activation passcode.

### Step 6

Collect the one time activation passcode from the email inbox you have specified. Use this to create your own memorable password and make a record of it.

### Step 7

If you or your team forget your password you will be asked a set of questions about memorable information. Please enter the details as requested. The same set of questions is asked 3 times. Only the Care Home Manager should reset the password. Answers to these memorable questions must not be shared with the team.

You have now completed your Engage Consult Registration. The next step is to add your residents under the username you have created. Please ensure that the Practice you are working with is aware of the username you will be using and has associated it with the Care Home and the necessary consent processes.

## Section 3

### How to add or remove a resident from your Engage Consult Account.

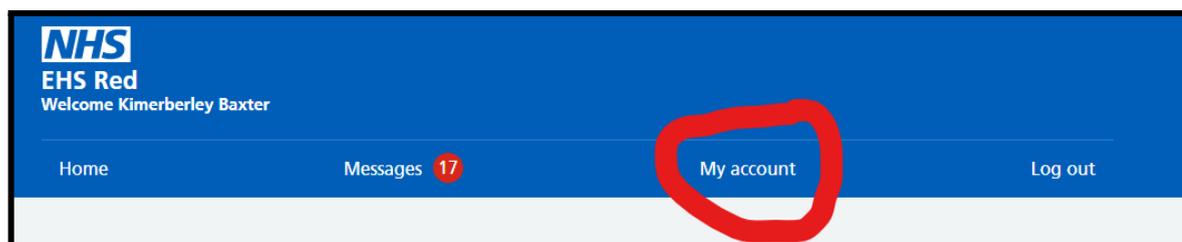
Your Care Home has an Engage Consult Account with the GP Practice responsible for the health care of one or more of your residents. Individual residents should be added under the username created for the senior carers who will be contacting the Practice on their behalf.

## To add a resident to the Engage Consult service

### Step 1

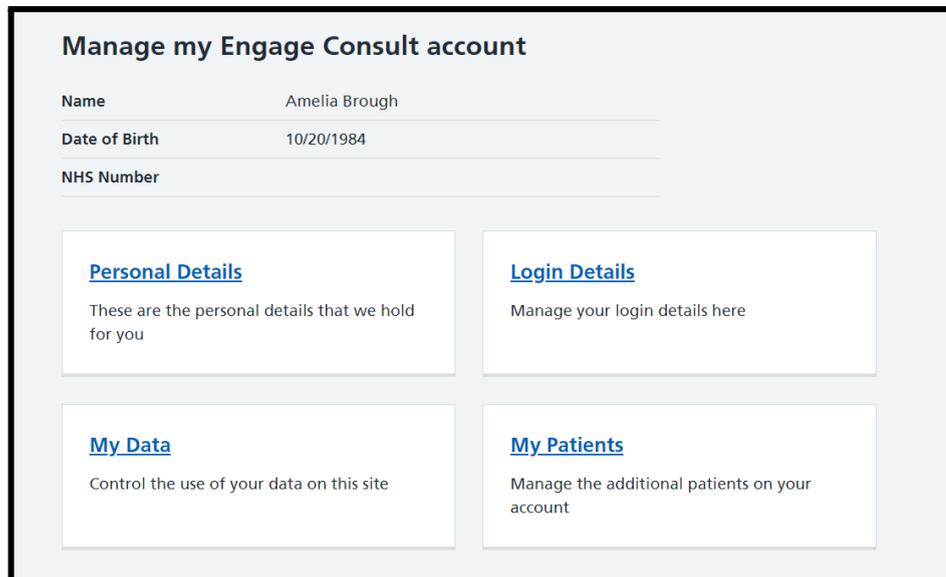
Visit the resident's GP Practice website and Click on the Online Consultation banner or Engage Consult logo. This will vary according to the Practice. Login to your account.

Select 'My account'.



### Step 2

Select 'My patients'.



### Step 3

Select 'I'd like to add a new patient'. This is where you add your resident's details.

## My patients

When you submit a medical consultation, admin query or health data, for someone else as a parent or carer, they will automatically be added to your Engage Consult account.

### Which patient would you like to manage?

- Lewis Allen
- Jenny Johnson
- Lei Vai
- Amelia Brough
- Baxter Lei
- I'd like to add a new patient

Continue

### Step 4

Enter the resident's details. Working through the next screens add name, date of birth and gender. The Practice uses the resident's details to verify them against their medical records, please ensure that details are accurate. Do not use nicknames or abbreviations.

### Step 5

When asked "What is your relationship to the patient", you are signing up as their carer.

### Step 6

Your resident has been added to the list of people who the registered user (senior carers) can act on behalf of. To initiate an online consultation click on the resident's name. So click no the enquiry is not for yourself.

### Is this enquiry for yourself?

- Yes
- No

Continue

Then select who the enquiry is about.

## Who is your enquiry about?

- Lewis Allen
- Jenny Johnson
- Lei Vai
- Amelia Brough
- Baxter Lei
- Someone else

**Continue**

How to remove a resident from the Engage Consult service.

If a resident leaves the Care Home or passes away, their name can be removed from the Engage Consult list of active residents. To do this login and select 'My account' then select 'My patients'. Select the patient you would like to remove and then select 'I want to remove this patient from my account'.

Deleting a resident does not have any effect on the medical information stored at the GP Practice. If you wish to reinstate this resident to the Engage Consult service you will need to enter their details again as instructed above.

## Section 4

### How to send a request to a GP Practice via the Engage Consult Online Service

Engage Consult is an online consultation service. It allows Care Homes to submit non-emergency medical and administrative requests to the resident's GP practice. The GP practice will provide an efficient and timely response from the most appropriate team member, this could be the GP, advanced nurse practitioner or from a practice administrator.

Your Care Home has already signed up to access this service for the residents who are registered with a Practice who use Engage Consult.

It is preferable to submit your request as early as possible so that the Practice can provide a prompt response.

#### Please note

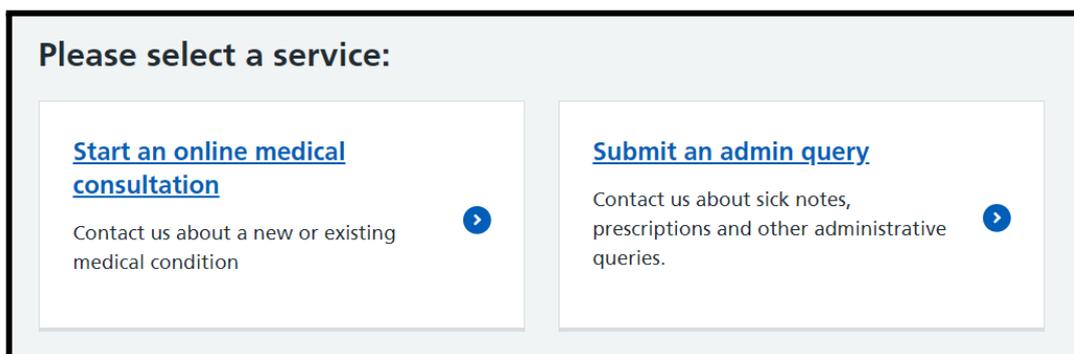
- Engage Consult must not be used for medical emergencies such as chest pain, loss of consciousness or profuse bleeding.
- Check the "Same day response time" for the practice you want to contact. If you submit your request outside these hours the Practice may not respond until the next working day. This is at the discretion of the Practice.

#### How to submit a request

##### Step 1

Visit the resident's GP Practice website and Click on the Online Consultation banner or Engage Consult logo. This will vary according to the Practice.

You will see a number of boxes. Click on the most appropriate service. Practices are able to adjust the wording so it may look slightly different.

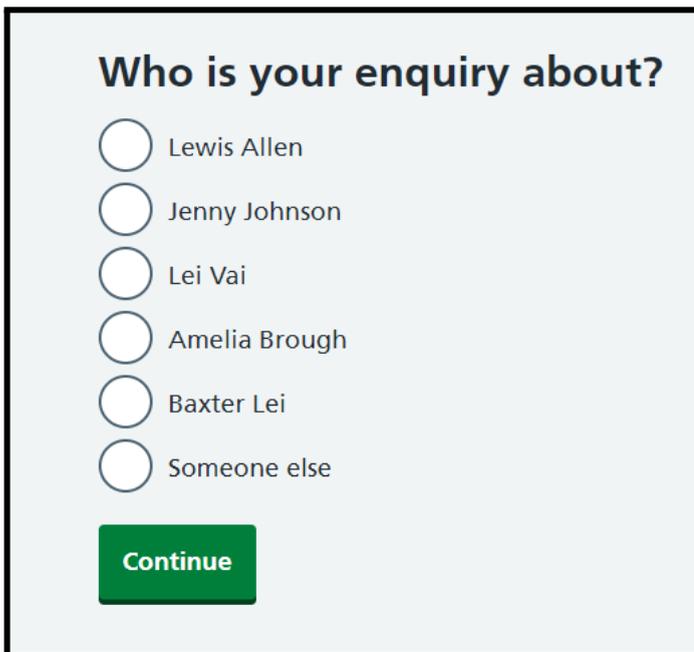


### Step 2

Using your Care Home's approved login details, type in the username and password, then click on "Login". Do not attempt to Sign Up and register yourself as a new user. A username has already been allocated to the resident by your Care Home Manager.

### Step 3

Choose the service you want to access on behalf of the patient. Then select who the enquiry is for.



**Who is your enquiry about?**

Lewis Allen

Jenny Johnson

Lei Vai

Amelia Brough

Baxter Lei

Someone else

**Continue**

### Step 4

If submitting an administrative request please click on the button, follow the instructions and type in your request. Add your name and job title in the box below. Press "Submit".

Requests can be made at any time of day but each Practice has a "Same day response time" after which they will not guarantee to respond within the same working day. If in doubt, check the response time for the Practice you are contacting.

### Step 5

To submit a medical request click on the most appropriate service you would like help with.

Over the next few screens you are asked for information about the particular problem you would like help with. Please complete them as accurately as possible. You will also receive a pop up screen to alert you to the fact that the online consultation service

should not be used for urgent medical problems or emergencies.

At the end of these questions you have the opportunity to attach a document or photograph to support the information you have given. Please ensure that any photographs are taken with a device belonging to the Care Home, do not use a personal mobile phone.

### **Step 6**

At the end of questionnaire you will see a copy of the medical report. This can be printed or saved as a pdf document, and added to the resident's records.

In the "Additional information..." box below the medical history please record your name and job title. This shows who submitted the request under the given username. (Next page)

### **Step 8**

On receipt of the request, the Practice will send an automated email to the email address recorded against that account. It states the exact time that the request was received by the Practice.

### **How to access the Response from the Practice**

When the Practice sends a response to the request you submitted, you will receive a notification email to say that there is a message waiting in the Engage Consult mailbox.

Log into Engage Consult to collect your response (this is accessed via the Practice website). The Practice is notified when you have accessed your message. You are able to reply via the online service but only in response to the message you have received.