

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 has a "Same day response time". If a request is submitted during (or before) this time most Practices state that they will send a response on the same day. Often they reply within a couple of hours. Generally, Practices do not offer online consultation services at the weekend. When registering to use Engage Consult the "Same day response time" will be displayed for your individual Practice.

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.

April 2020

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.

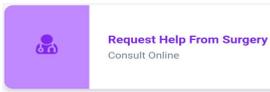
To Register the Care Home Account with Engage Consult

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.



You will see a number of coloured boxes. Click on the “Request Help from Surgery” button.



Practices are able to adjust the wording and colour so it may look slightly different.

Click on the button to Sign Up. If it is not immediately available click on Login, this will also take you to the Sign Up option. The Login or Sign Up page can also be accessed via the 3 small lines in the top right hand corner of the login page.

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.

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.

NHS Jane Watson's Surgery

Register Account
Please enter your email address

Email

Use email address as my username

We will only use email for notifications system. We will NEVER use email to discuss medical issues. By entering your email you are consenting to receiving notifications from the system.

Continue

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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.

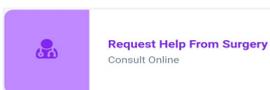
To add a resident to the Engage Consult service

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.

You will see a number of coloured boxes.

Click on the "Request Help from Surgery" button. Practices are able to adjust the wording and colour so it may look slightly different.



Step 2

Using your Care Home's approved login details, add username and password, then click on "Login".

NHS Blue Medical Practice

Online Services Login

Username

Password

Login

Sign Up Here

Forgotten Password

Access to this computer/system and any information it contains is limited to authorised users only. Legal action may be taken against unauthorised use of, or unauthorised access to, this computer/system and/or any information it contains, including pursuant to the Computer Misuse Act 1990. If you are an authorised user, by proceeding to access and use this computer/system and/or the information it contains, you are accepting any terms of use, notices and policies which are contained or referenced within it or which have otherwise been drawn to your attention as an authorised user.

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Step 3

If asked, follow the instructions to show you are not a robot!

Step 4

In the example below, the username is Care Home Manager. To add a new resident click on "Add Someone Else". This is where you add your resident's details.

NHS Blue Medical Practice
Care Home Manager

Who would you like to access services for?

Care Home Manager (Self)

Add Someone Else

Step 5

Enter the resident's details. Working through the next 3 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 6

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

NHS Blue Medical Practice
Care Home Manager

Add Patient

What is your relationship to the patient?

Parent

Carer

Step 7

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.

In this example The Care Home Manager added Ben Jones under her username. She can now click on Ben Jones to access the online consultation service for him.

NHS Blue Medical Practice
Care Home Manager

Who would you like to access services for?

A patient has been successfully added

Care Home Manager (Self)

Ben Jones (Carer)

Add Someone Else



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 click on the patient's name to bring up the list of service options. At the bottom of the list there is an option called "Patient Info". Click on this to view the resident's details. At the bottom of this page there is a button to "Delete Patient". Click on this to remove the resident from the Engage Consult list of active residents.

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 coloured boxes. Click on the "Request Help from Surgery" button. Practices are able to adjust the wording and colour 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.



NHS Blue Medical Practice

Online Services Login

Username

Password

Login

Sign Up Here

Forgotten Password

Access to this computer/system and any information it contains is limited to authorised users only. Legal action may be taken against unauthorised use of, or unauthorised access to, this computer/system and/or any information it contains, including pursuant to the Computer Misuse Act 1990. If you are an authorised user, by proceeding to access and use this computer/system and/or the information it contains, you are accepting any terms of use, notices and policies which are contained or referenced within it or which have otherwise been drawn to your attention as an authorised user.

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Step 3

Select the patient from the list. In the example below the Care Home Manager has logged in and is accessing services for Ben Jones.

NHS Blue Medical Practice
Care Home Manager

Who would you like to access services for?

Care Home Manager (Self)

Ben Jones (Carer)

Add Someone Else

Step 4

Choose the service you want to access on behalf of the patient. The Practice decides which options to list here, choose the most appropriate.

Step 5

Please read, consider and tick the Terms of Service statements and press continue.

Step 6

Enter the best telephone number for the GP to contact you on if necessary. This should be the Care Home number and not a personal mobile phone.

Step 7

Click on the option which best describes your query. (Next page)



NHS Blue Medical Practice
Care Home Manager - Acting for Ben Jones

Requesting help from the surgery
What best describes your request?

Administrative Query Or Question

A Medical Problem 

 Please note: We are now outside the time where we offer a same day response, if you continue with your request for a consultation about a medical problem you must confirm that you understand that *we will not look at or respond to your request until our next usual working day.*

[Show same day response times for this service >](#)

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.

The example above shows a request made outside the "Same day response time". The request will be accepted by the Practice but may not be processed until the next working day.

Step 8

To submit a medical request click on the most appropriate service you would like help with. In the example below "Care Home Requests" is added as an option (The Practice is able to decide on which options they add to this section)

NHS Blue Medical Practice
Care Home Manager - Acting for Ben Jones

Requesting help from the surgery
Who would you like help from?

Anyone

Duty Doctor - For Same-Day Response

Practice Nurse

Practice Pharmacist - Medication Reviews

Follow Up Appointment Requests

Fit Note

Care Home Requests

Step 9

When asked to give your availability, click on "Yes that's fine". This question is aimed at individual patients.



Step 10

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.

NHS Blue Medical Practice
Care Home Manager - Acting for Ben Jones

Requesting help from the surgery
Would you like to attach a file to your request? This could be a document or a photograph.

Yes, upload file

No, Thanks

Step 11

You are now asked to complete the online medical history regarding the reported medical problem. Please click on this option.

Step 12

The Instant Medical History questionnaire will take you through a series of linked questions relevant to the problem you have reported. You will have lots of time to consider your response, so please answer these questions carefully as they will form a report which will be filed in the residents medical records at the Practice.

Step 13

At the end of the medical history 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)



movement. Mid back pain after injury or accident. Mid back pain worsened by coughing or sneezing. Mid back pain associated with chest pain and nausea. Swelling of the neck, arm, or hand. He reported: Pain only in the mid back.

Lumbo-Sacral Spine
He reported: First consult for back pain.

Neurological
He denied: Numbness, burning or tingling in arms, legs or face. Muscle weakness. Trouble walking.

Questionnaire Completion
The questionnaire was completed.

Additional information or errors in the above

Download Report

Accept and Continue

Step 14

The next screen confirms the telephone number you have given and states that 2 way messaging is the preferred option. DO NOT tick the box "Please contact me by telephone only" as this disables the messaging service.

Step 15

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). You will find your message from the Practice by clicking on the 3 small white lines in the top right hand corner of the blue bar. 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.

April 2020

