

Online consultation tools research & care navigation guidance

Primary and Community
Transformation & Improvement Team,
NHS England

For support with online consultation tools and care
navigation contact us:

Dominic.Vallely1@nhs.net

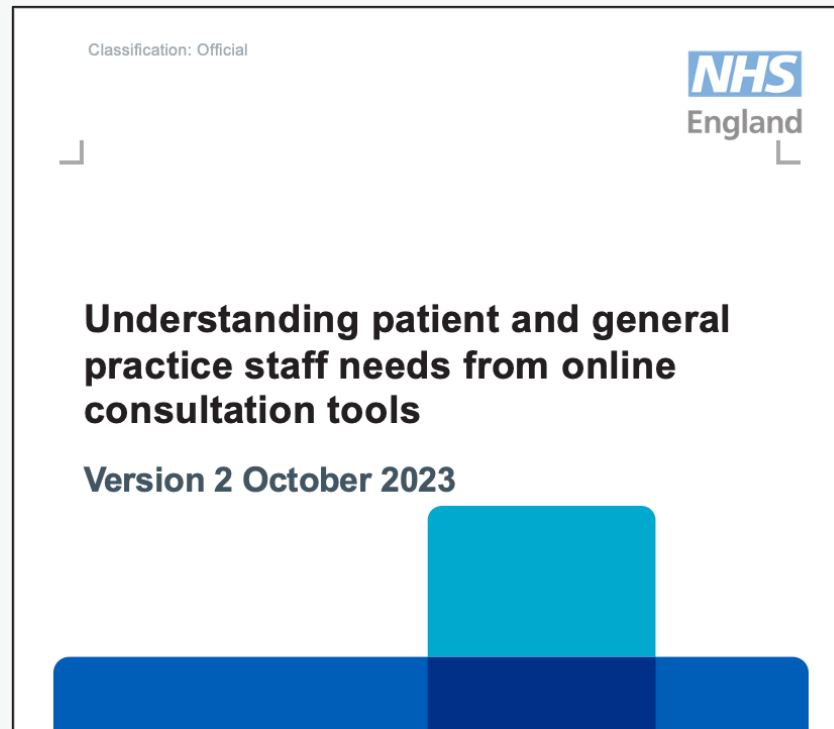
Emmy.Graham@nhs.net

Choosing the right online consultation tool for patients and practice workflow

Quick question

Have you seen or read one or both of these?

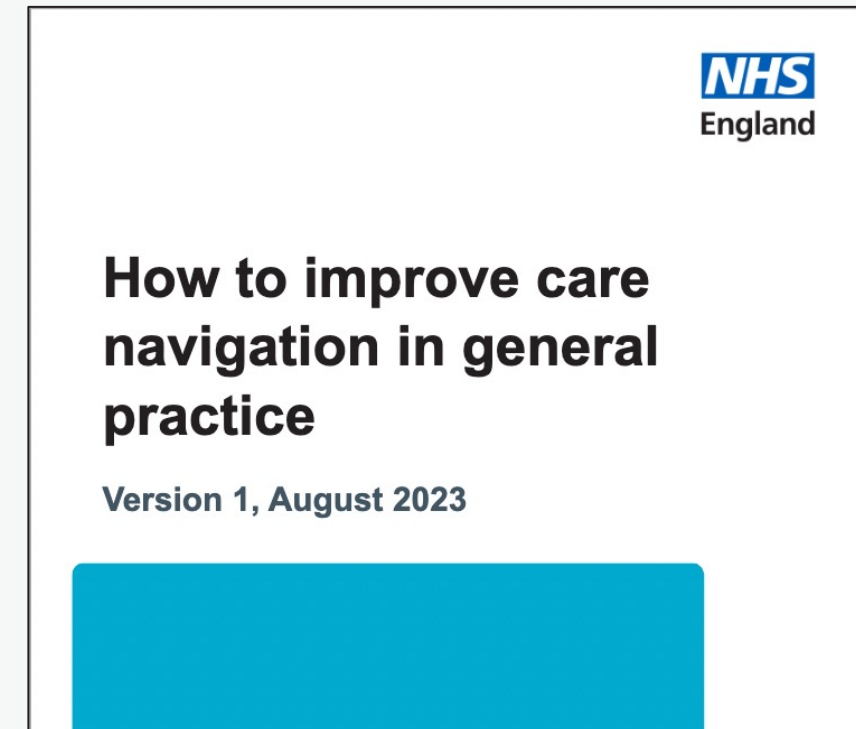
Add neither, care nav or OC in the chat.



<https://future.nhs.uk/connect.ti/DigitalPC/viewdocument?docid=173457381>

Available via Future NHS - search for the title above

Designing or improving care navigation processes and workflow



<https://www.england.nhs.uk/gp/national-general-practice-improvement-programme/resources/>



Our ask – to share this research

1. **Cascade and share across systems.**
2. **Arrange a briefing:** we're happy to come along.
3. **Remind teams GPIIP support offers can provide hands on support** with designing or improving care navigation.
4. **Contact us:** for support or to give feedback
Dominic.vallely1@nhs.net
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5. **Introduce us:** we'd like to speak to practices introducing or upgrading their care navigation. We'd also like to speak to practices using Anima, Doctrin or Rapid tools.

Who we need to reach

- ICB teams leading OC tool tenders, shortlisting, procurement
- Clinical leads in ICSs, PCNs and practices
- Digital leads in ICSs, PCNs and practices
- Digital inclusion leads
- Accelerators

Improving patient online journeys, improved care navigation and expanding capacity are at the heart of PCARP

1. Goal

Improvement in patient experience / practice experience of general practice

2. Model

Modern general practice model

A fairer, safer, more sustainable model for general practice

3. Plan

Primary Care Access Recovery Plan (PCARP)

4. Critical enablers

GP websites

Highly usable and accessible patient journeys for key tasks

NHS App

Supporting self-service + better integration with practice workflow

Digital Services For Integrated Care (DSIC)

Better digital tools for practices; telephony, online consultation, booking and comms tools

Pharmacy First

Re-distributing workload away from general practice

ARRS / workforce

To increase capacity

5. Transformation support

General practice improvement programme (GPIP)

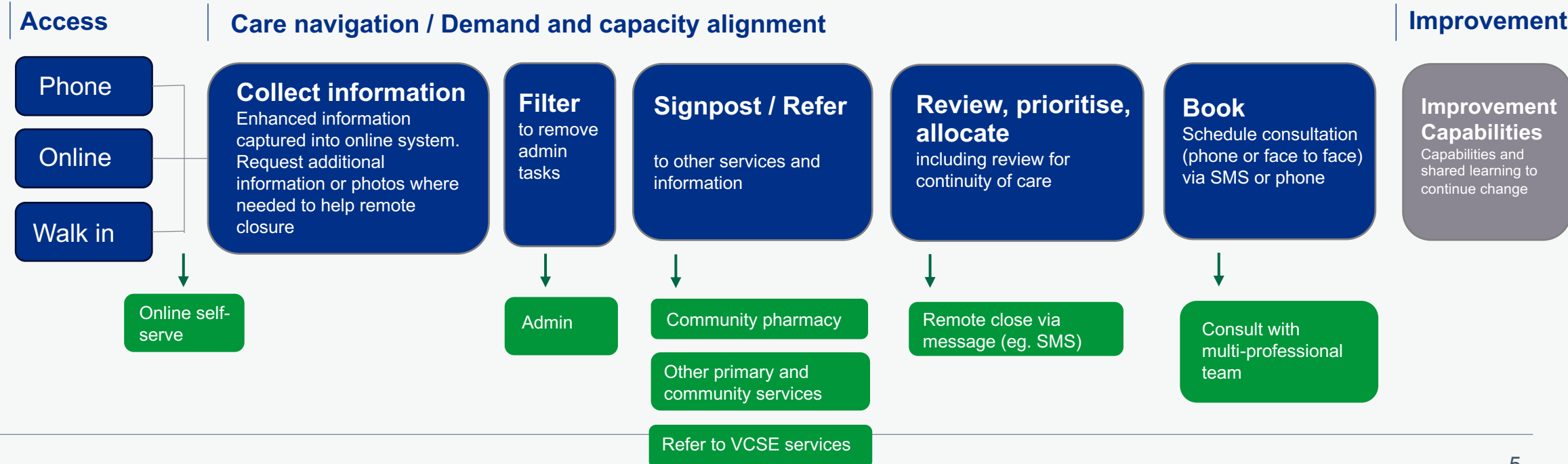
‘Hands on’ support for practices and PCNs to improve telephony journeys, online journeys, improve care navigation and better align capacity with demand

Care navigation supported by highly usable and well-integrated digital tools is the heart of modern general practice

Objectives



Modern general practice model



Understanding patient and general practice staff needs from online consultation tools

*Based on research with
165 general practice staff
in 26 practices*

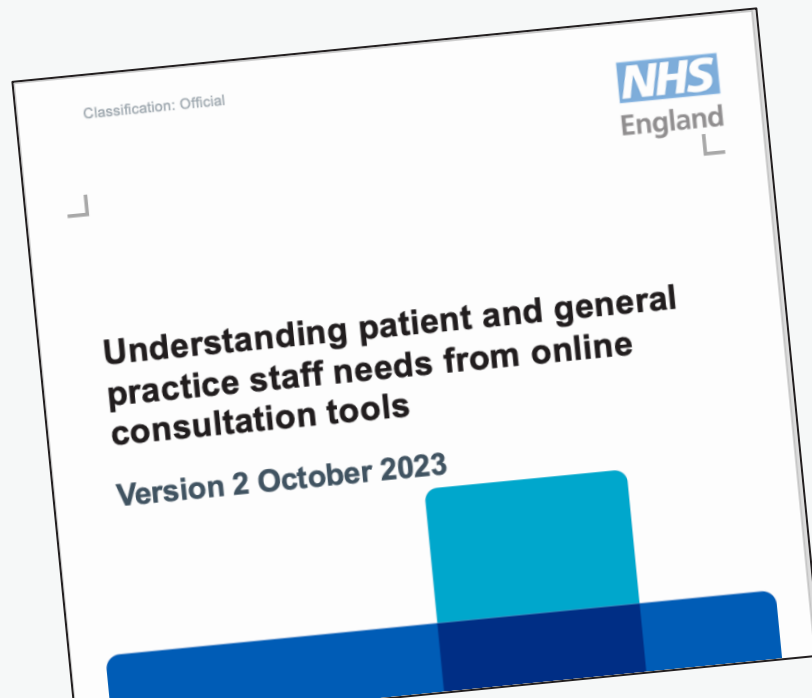
*and 152 patients testing
15 online consultation
tools*

Four sections

1. Patient needs
2. General practice staff workflow needs
3. Detailed comparison of 15 online consultation tools
4. Information about advanced functions

Benchmarking of 15 online consultation tools

- | | |
|-----------------------|---------------------|
| • Accurx | • Engage |
| • Anima | • Footfall |
| • Ask First | • Forms 4 Health |
| • AskMyGP | • iPlato / MyGP app |
| • Doctorlink | • Klinik |
| • Doctrin | • Patchs |
| • eConsult | • Rapid Health |
| • EMIS online consult | |



Understanding user needs around reading and language

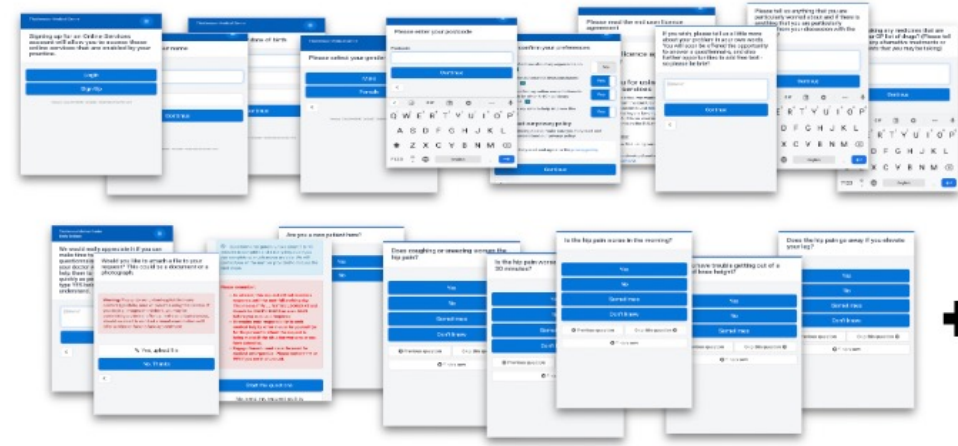
Reading is a significant challenge for many patients. 'Reading and comprehension challenges' vary between tools

- **The volume of copy** to read and comprehend is a significant burden for many. The nature of algorithmic systems makes this a very significant burden for participants using these systems
- **'Medical jargon' used** that is unclear to users (in especially in algorithmic forms, for example 'talking therapies' 'abdominal aortic aneurysm')
- **The reading age** of copy is highly variable
- **The clarity of copy** is highly variable



EMIS OC:
Landing page with 93 conditions/symptoms to read, understand, compare and decide.

78 screens - Engage



++

4 screens - Forms4Health



Note: Number of steps is taken from a standardised medical scenario applied to a selection of OC systems in an UX expert review in the discovery phase.

Understanding user needs around question sets and length

For a (standardised) scenario the number of questions a user needs to consider and respond vary considerably

Accurx	Klinik	eConsult
<p>Please describe the medical problem.</p> <p>If you are filling this in on behalf of someone else, please make that clear.</p> <p>+ Attach a photo (optional)</p> <p>How long have these symptoms or concerns been going on?</p> <p>Have they got better or worse?</p> <p>Is there anything you are particularly worried about? (Optional)</p> <p>How would you like us to help?</p> <p>Please enter any times during opening hours when we cannot contact you (Optional)</p> <p><i>Note: practices may also send a form to a minority of patients (e.g. Florey medical questionnaires) to request further information to support care navigation and triage.</i></p>	<p>Touch the body map at the location of your main symptom</p> <p>Duration of symptoms (from condition onset)</p> <p>Sex registered at birth</p> <p>Age</p> <p>Select your primary symptoms (from condition onset)</p> <p>Symptoms in the selected location</p> <p>General symptoms</p> <p>Symptoms in a different location</p> <p>Do you have any of the following symptoms?</p> <p>The situations below may suggest a more urgent care need. Does any describe your current state?</p> <p>Pain (Hip pain, Pain on movement, Pain at rest):</p> <p>Describe your symptom with more detail: When did it begin? How and in what situation did it manifest? Has the symptom changed since it begun? If so, how?</p> <p>Difficulty walking:</p> <p>Describe your symptom with more detail: When did it begin? How and in what situation did it manifest? Has the symptom changed since it begun? If so, how?</p> <p>Limited movement:</p> <p>Describe your symptom with more detail: When did it begin? How and in what situation did it manifest? Has the symptom changed since it begun? If so, how?</p>	<p>Find the problem you want to ask about. Search by condition, symptom or topic.</p> <p>Before you contact your practice, have you considered other ways to get help?</p> <p>Who are you submitting this request for?</p> <p>Are you a registered patient at the following practice?</p> <p>Tell us your sex</p> <p>Tell us your date of birth</p> <p>Please tell us in a few words how we can help.</p> <p>Have you tried anything for this?</p> <p>Is there any particular help you would like?</p> <p>Please describe your symptoms.</p> <p>Did you injure your hip(s)?</p> <p>How long have you had your current symptoms?</p> <p>Are you able to put your full weight on your leg(s) and take 4 steps without help?</p> <p>Do you have hip pain that wakes you up at night?</p> <p>Which hip(s) is the problem?</p> <p>Is your hip(s) painful?</p> <p>How bad is your hip pain?</p> <p>How does your hip pain affect you?</p> <p>Is your hip(s) swollen?</p> <p>Is your hip(s) red or hot to touch?</p> <p>Have you had a temperature of 38 degrees C (100.4 degrees F) or above during this illness?</p> <p>Have you had any uncontrollable shivering?</p>

	<p>Have you used any medication or other treatment for your ailment?</p> <p>Describe what kind of medication have you used or other treatments you have had for your ailment.</p> <p>Have clinical staff already seen you or treated this health problem?</p> <p>Times NOT suitable for you</p>	<p>Do you have pain in your lower back?</p> <p>Do you have any weakness in your leg(s) that was not there before?</p> <p>Do you have any pins and needles or tingling in your leg(s)?</p> <p>Do you have pain in your groin(s)?</p> <p>Do you have pain in your thigh(s)?</p> <p>Have you had a problem with your hip(s) before?</p> <p>Please tell us what happened when you had a problem with your hip(s) before and if you saw a doctor or nurse about it.</p> <p>Have you had any unexplained weight loss in the last 3 months?</p> <p>Have you had any surgery to the problem hip(s) in the past 2 weeks?</p> <p>On the next screen you'll be able to upload photos related to your request.</p> <p>Is there anything else you would like to tell us that we have not asked?</p> <p>Do you drink alcohol?</p> <p>Do you smoke?</p> <p>Do you have any allergies?</p> <p>For example, medications, creams or food.</p> <p>Are you, or is there a chance you might be, pregnant?</p> <p>Have you given birth in the last 12 weeks?</p> <p>Have you had a miscarriage in the last 12 weeks?</p> <p>Have you had a termination in the last 12 weeks?</p> <p>Are you breastfeeding?</p> <p>Have you or anyone in your household had COVID in the last 1 month?</p>
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Figure 12: Question set for patients to answer within three online consultation tools for the same symptoms

Understanding accessibility and compliance with WCAG accessibility standards

	Total fails	Fail: High priority	Fail: Medium priority
Footfall	5	1	4
eConsult	6	5	1
Patches	9	5	4
AskFirst	10	7	3
Doctrin	12	7	5
iPlato	12	7	5
Accurx	12	8	4
Anima	14	8	6
askmyGP	12	9	3
Rapid	15	9	6
Forms4Health	17	9	8
Doctorlink	12	10	2
Engage Consult	17	10	7
EMIS Online Consult	25	17	8
Klinik	34	26	8

Note: Table show results of independent accessibility testing against WCAG AA standards

Findings are summarised in four comparison tables

Report contacts four comparison tables:

- Functionality for patients
- Usability for patients
- Workflow functions for practices
- Advanced workflow functions for practices

	Accurx	Footfall	AskMyGP	Klinik	eConsult - With inbox	eConsult - No inbox	Engage	Ask First	EMIS Online Consult	Forms 4 Health	Doctorlink	iPlato - myGP app	Patchs	Doctrin	Anima	Rapid Health
Usability for patients																
Access channel - patient can access via web and via NHS App / one of those channels / none or other app																
Patient account - no account required / account required and uses NHS login in / account required does not offer NHS login																
Ease of reading - question set meets / does not meet NHS recommended reading age when tested																
Ease of expression - patient has a place in "request clinical help" journey to express needs in free text format. Yes / No																
Journey length - number of questions in standardised clinical request (hip pain scenario)																
Average completion time - average time to complete in user testing - under 5 minutes / 5-10 minutes / over 10 minutes																
Completion rate - from user testing - 100% completed / 75-99% completed / fewer than 75% completed																
Response time and channel information - info at start of clinical form and confirmation screen or email / one of those / none of these																
Accessibility : tool met WCAC AA when tested - in full / moderate number of fails / high number of fails																
Tool uses NHS design patterns - yes / no																
Text alerts in response to clinical request : patient receives reply or is alerted to reply by text / patient choose response channel or text by default / practice chooses channel																
Deeplinked journeys - patient can click link and jump into right task that patient wants to achieve (and not have to go via a menu). Yes has this function / No																

Note: Light blue means the tool meets the criteria in full, mid-blue means the tool meets the criteria partially. Dark Blue means the tool does not meet the criteria. Note: some criteria only have two options meets / does not meet.

Unpacking care navigation process and workflow

Contact	Filter, review, prioritise, allocate and book							Consult	
Contact channel / format	1. Admin filter	2. Red flag check	3. Review patient request	4. Signpost or refer	5. Review wider context	6. Deciding urgency or priority	7. Resolve, signpost , refer or book	8. Prepare to consult with patient	9. Consult with patient

Figure 20: Steps in care navigation and triage processes identified in research with general practice staff

We'd like to speak to practices using Anima, Rapid, Doctrin and any practice groups or PCNs moving to shared triage.

Comparing key workflow functions

- Operating hours
- Staff OC form
- Patient ID matching
- Red flag questions
- Key triage questions asked
- Shared worklist / inbox
- Routing rules
- Message patient
- Message with attachments
- Canned responses
- Library of medical forms
- Form builder tool
- Save to patient record
- Usability for patient

	Accurx	Footfall	AskMyGP	Klinik	eConsult - With Inbox	eConsult - No Inbox	Engage	Ask First	EMIS Online Consult	Forms 4 Health	Doctorlink	iPlato - myGP app	Patchs	Doctrin	Anima	Rapid Health
Core workflow tools for practices																
OPERATING HOURS: Outside of core hours practices can set different times for admin and clinical forms / Practice can set one set of operating times / not able to set any open-close times																
STAFF OC FORM - has back office OC form + identifies patient automatically / has back office form / no back office form																
PATIENT ID MATCHED: patient ID is automatically matched when online OC form received into system - yes / no																
RED FLAG QUESTIONS: OC form includes red flag questions and re-direct advice																
KEY TRIAGE QUESTIONS ASKED: question set includes key questions for triage - yes / no																
SHARED WORKLIST / INBOX: OC tool has shared inbox and functions to assign and transfer work between people, roles and teams																
ROUTING RULES : Practice can set rules about which type of forms can be sent direct to different inboxes, teams or roles.																
MESSAGE PATIENT : practice can message patient within the workflow / cannot message within workflow																
MESSAGE TO ATTACHMENTS : practice can add attachments, links to information and questionnaires / can attach some / can attach none																
CANNED RESPONSES: has library of responses to conditions and can create own / can create own library and send / not able to create library																
LIBRARY OF MEDICAL FORMS: has large library of medically approved forms / has small library of forms / no forms																
FORM BUILDER TOOL: practice can create forms for use in care navigation and triage / can't create forms																
SAVE TO PATIENT RECORD - direct sent as structured information workflow / Sent as pdf to workflow for review and accept into patient record. / practice has to cut and paste																

Note: Light blue means the tool meets the criteria in full, mid-blue means the tool meets the criteria partially. Dark Blue means the tool does not meet the two options meets / does not meet.



Choosing highly usable and well-integrated online consultation tools to support well-designed care navigation workflows delivers significant benefits

- **Provide patients with equitable access and choice of contact channels;** enabling patients to choose channels and times to contact GP surgeries that suit their needs at that point
- **Support practice staff to collect structured information about patients' clinical needs;** to support better assessment of need and urgency which facilitates allocation of clinical resources
- **Support care navigation processes;** by providing tools and functions to review, assess, prioritise and allocate patient requests to teams, roles and individuals at different stages of care navigation, triage and booking
- **Support effective and equitable allocation of clinical skills and time;** to match patient need to the appropriate clinician, within the right time frame, using an appropriate consultation modality (written, phone, video, face-to-face)
- **Reduce practice burden;** by increasing workflow efficiency and releasing time for general practice staff



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