

patches

The Next Generation in Online Consultation

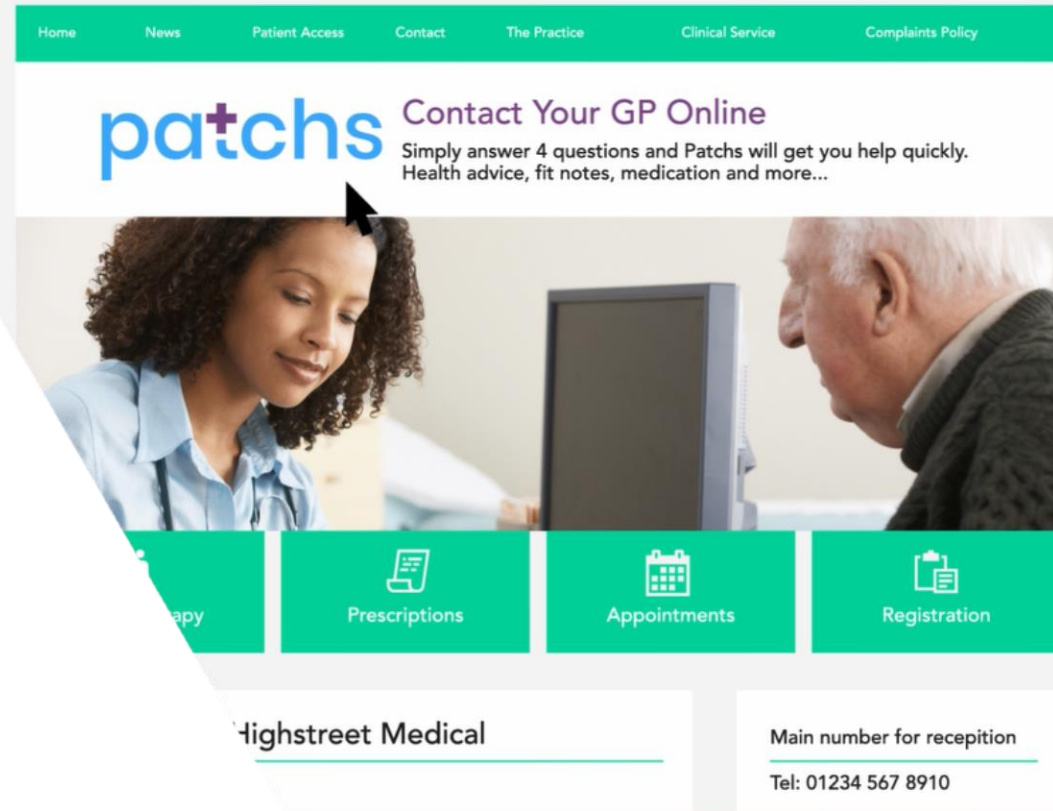
Getting Started with
PATCHS

 advanced



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Introduction

What is PATCHS?

- PATCHS is a next generation online consultation system designed to reduce workload, and improve patient safety and experience.
- PATCHS increases patient accessibility to primary care services whilst allowing practices to effectively manage demand and capacity.

Why Choose PATCHS?

PATCHS has been designed by GPs in collaboration with The University of Manchester. It addresses the problems of other online consultation systems through its:

- **All-in-One Solution:** PATCHS provides Online and Video Consultation, SMS Messaging, Bulk Messaging Triage, Clinical System Integration, Patient Facing Services, and Language Translation.
- **Clinical System Integration:** connects with EMIS, SystemOne, PDS and Docman 10 to automate data flows and reduce manual work.
- **Full Demand Control:** limit the number of requests by type (admin/clinical) by day of the week, time of day, and by staff member. It can also be turned off out of hours or immediately with 1-click.
- **Clinical Questionnaires:** a custom builder and a large library including asthma, mental health, back pain and many more.
- **Federated Working:** practices can easily work as hubs and group practices with 1-click federated working which allows staff to easily switch between practices.

Onboarding: Process Overview

Welcome Email

- Read the email carefully as this details the steps in PATCHS onboarding.
- Respond providing: GP Practice Name, GP Practice Code, GP Practice Administrator Name, and GP practice Administrator Email.
- Complete and return the eLearning User Registration form (spreadsheet) to sign staff up for the service.
- Schedule a convenient time for the kick-off call.

Kick-off Call

- We will go through the onboarding checklist with you and detail a plan for your migration and training
- During the call we will tailor the plans to suit your individual practice needs by choosing which features you would like to use.

Setup PATCHS

- The GP practice administrator will receive an email inviting them to create their PATCHS practice and create their own user account.
- They can then set up integration with the clinical system, the PATCHS configurations, and invite other members of staff. Please review the following slide detailing the setup process for guidance.

Training

- To learn the PATCHS functionality and best practices for implementation we advise all members of staff to conduct training prior to Go Live.
- We have a variety of training tools tailored to your needs from in-person 1-1 training to eLearning and the [PATCHS Help Centre](#). These are detailed in the Training section of this guide.

Go Live

- Add the PATCHS banner to your practice website, allowing patients to organically start making online consultation requests.
- Promote PATCHS: message your patients and add message to your telephone system.

Onboarding: Setting Up PATCHS

Step 1: Add your practice details including: Practice Name, Telephone Number, Opening Hours, PCN, CCG.

You can also configure standard messaging for patients, such as, the maximum time they should expect to wait for a response and the message patients see on the homepage.

Step 1
Enter practice details

Step 2
Set up your account

Step 3
Invite staff to use PATCHS

Add Practice

Practice name*
TPP Test Practice 4

GP practice email address used to receive electronic correspondence*
tpp4@nhs.net

Opening hours (please also include days of the week e.g. Monday-Friday 8AM-6.30PM)*
9 - 5

Country*
England

PCN*
QA Medical Practice abc

PCN not found

Clinical System*
SystemOne

Landing page message
Some local message

Submit

Unique code which shows in the web address for your practice*
tpptestpractice4

Practice phone number*
01222434234

Number of working hours after which the patient should call the practice if they haven't received a response from you (e.g. 24 hours)*
24

Organisation Code*
tpp4

CCG
SALFORD

All questions marked * are required.

Step 2: Next you create your own account as an administrator and set your role.

If you are a GP, you should set it as your role here and add your GMC number.

Step 1
Enter practice details

Step 2
Set up your account

Step 3
Invite staff to use PATCHS

Personal Details

Role*
GP

GMC Number*
122222

All fields marked with * are required.

Register

Skip

Step 3: Finally, you can invite other members of staff. You can enter their NHS email address and their role and then press the 'Invite' button.

Once you have invited members of staff you click 'Complete' to finish registering your practice.

Step 1
Enter practice details

Step 2
Set up your account

Step 3
Invite staff to use PATCHS

Invite your colleagues to create a PATCHS account

Registered Staff

NAME	EMAIL	ROLE	OUT OF OFFICE	EMIS USERNAME	REMOVE
Emis2 Emis2	emis2@nhs.net	GP	<input type="checkbox"/>	emis2	✕
Emis2 Emis2	emis2@nhs.net	PATCHS Admin			

Invite Staff

Email*

Role*
Select

Invite

Invited Staff

EMAIL	ROLE	REMOVE	RESEND
emis2rec@nhs.net	Receptionist	✕	✉

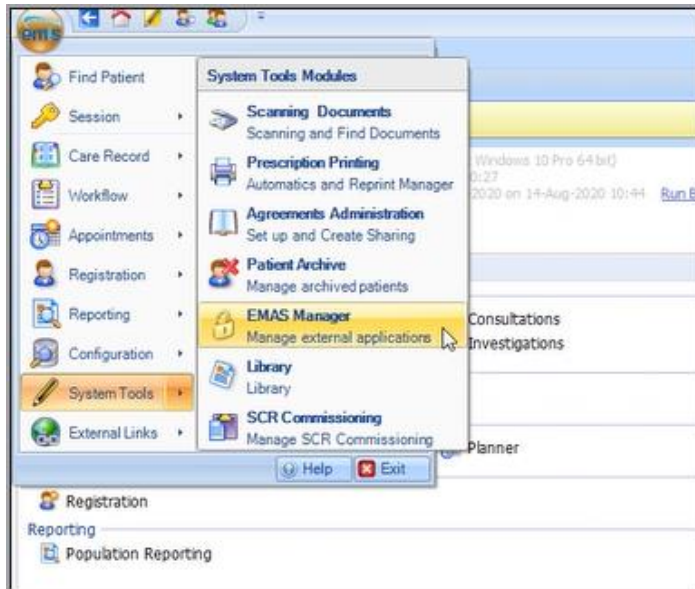
Complete

Onboarding: EMIS Practices

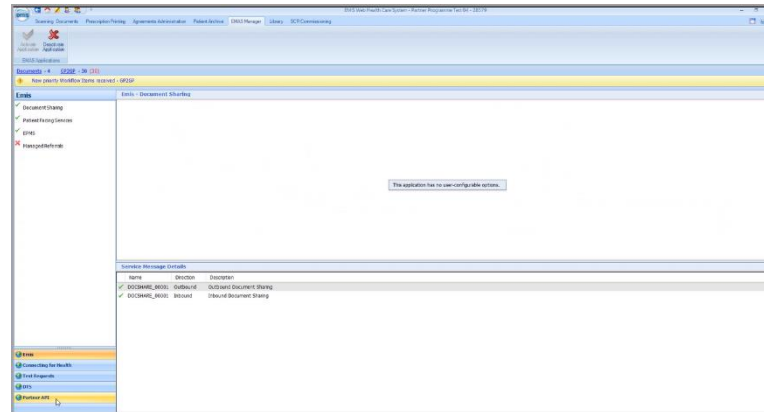
Enabling EMIS Integration

To start using the PATCHS EMIS clinical system integration it must first be enabled in EMIS.

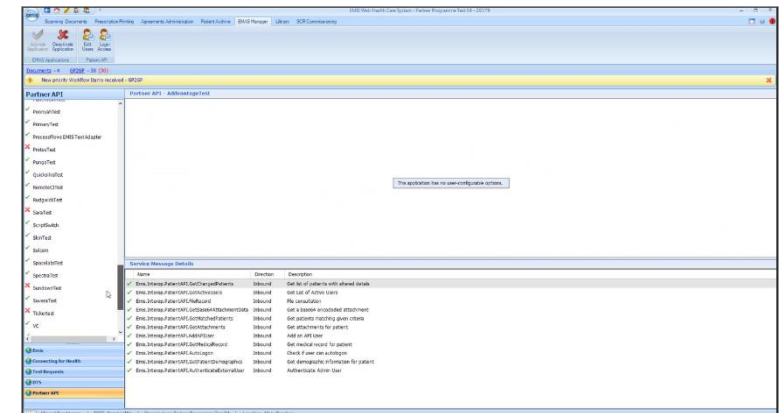
Step 1: Log into EMIS and select the menu button in the top-left corner. Then select 'System Tools' and load the EMAS Manager.



Step 2: Select the 'Partner API' option in the bottom-left corner.



Step 3: Select PATCHS from the Partner API list on the left, and then click the 'Activate Application' button in the top-left corner. Check that the staff access is enabled and this completes the EMIS integration process.

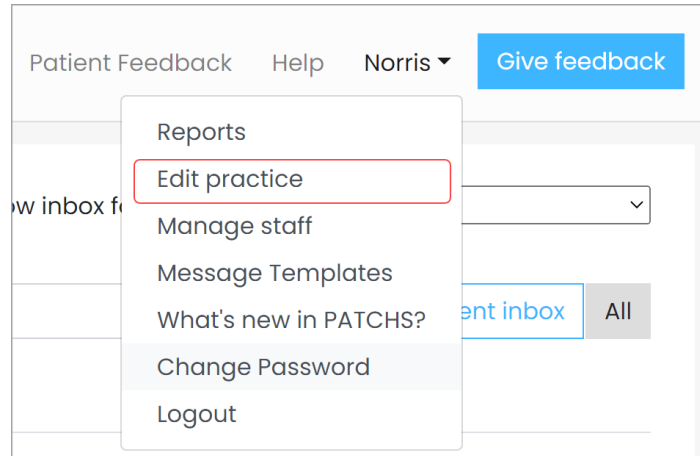


Onboarding: TPP Practices

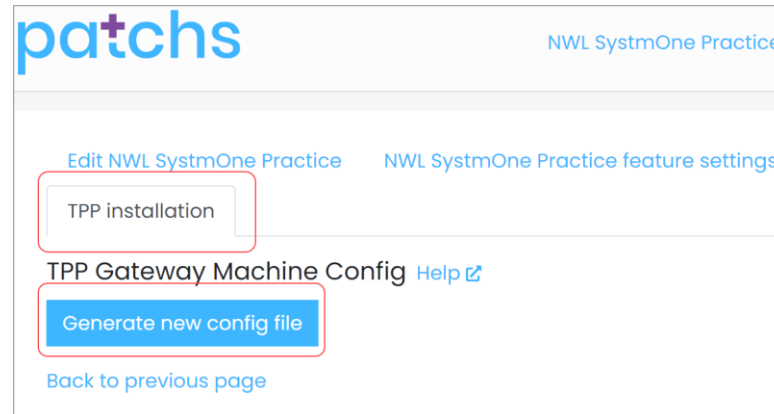
Setting up the TPP Agent

To start using the PATCHS TPP clinical system integration you must first download software (TPP Agent) to your TPP Gateway computer.

Step 1: On the TPP Gateway computer, in PATCHS, click on your username in the navigation bar. From the dropdown, select 'Edit Practice'.

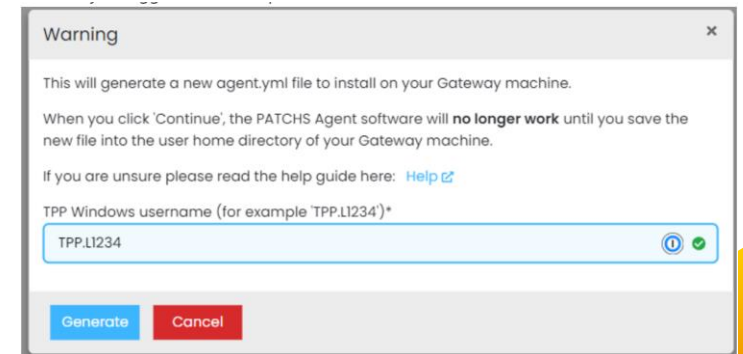


Step 2: From the 'Edit Practice' page select the 'TPP Installation' tab, Click the 'Generate new config file' button.



Step 3: Type in the TPP windows username on the gateway machine (e.g. 'TPP.L1234'). [If you do not know the username please contact your technology team]. Then click 'Generate' and you should see a green 'Success' notification appear in the top-right of the screen, and the file will be downloaded to your computer. Please save the file to this address:

C:\Users\[name of their windows user]\agent.yml



Key Features

PATCHS is a next generation online consultation system including all the features a modern practice needs to run efficiently.

It has been designed in a modular way to make it fully customisable. Features can be enabled/disabled at any time to tailor the solution to your practice's specific needs. These are some of the key features and associated help links.

Feature	Description	Key Help Links
Online Consultation	Allow patients to contact the GP practice online for support.	Submitting a Request Responding to a Request
Video Consultation	Conduct video consultations with your patients using PATCHS' inbuilt system.	Conducting a VC
Ad-hoc and Bulk SMS Messaging	Initiate messages with specific patients or target cohorts	Ad-hoc SMS Messaging Bulk Messaging
Clinical System Integration	Auto-register patients and file consultations directly into the clinical system in 1-click with no manual work	Auto-Registration Auto-Filing
Demand Management	Limit the number of patient requests by type, day of week, and hour. Switch PATCHS off out of hours.	Request Limiter
Booked Slots	Schedule routine requests for convenient times in the future to spread demand	Booked Slots
Patient Facing Services	Enable patients to use NHS Login, book appointments and order prescriptions	Booking Appointments Medication Requests

Key Features

Feature	Description	Key Help Links
Artificial Intelligence Triage	Increase efficiency by automating the triage process with PATCHS AI tirage algorithms.	Urgency AI Assign AI
Signposting	Automatically direct low risk requests to NHS self-help advice and local services	Signpost Panels Signpost AI
Clinical Questionnaires	Select from a library of clinical questionnaires or build your own and add Snomed codes	Templates Patient Views Creating Questionnaires
Language Translation	Support patients who speak English as a Second Language with PATCHS automated translation	Translate
Reporting Dashboard	Analyse your patient usage to optimise your offering and fulfil reporting requirements	Dashboard CCG Reporting
Toolbar	Allows users to easily switch between PATCHS and the clinical system and directly message patients in 1-click.	PATCHS Toolbar Docman Toolbar

Training

- A dedicated transformation success manager will guide each practice through the implementation process. You can email/call them with questions and ask for guidance throughout the deployment.
- They will tailor a Change Management and Training Plan to ensure PATCHS meets your specific needs and to minimise disruption.

eLearning

Provides structured online learning paths for clinical and non-clinical staff.

Staff can learn in their own time, minimising disruption, and Practice Managers can monitor progress.

Seminar Training

Group sessions with Subject Matter Experts, structured to suit clinical and non-clinical staff.

Guidance on online consultation use, best practice, likely impacts on practices, engagement with patients ...

PATCHS Help Centre

Go-to place for staff and patients with questions. Provides a large repository of information about functionality, best practice, how to guides, FAQs, and videos.

Webinars

Monthly webinars demonstrate new functionality and best practice, providing a great opportunity for update and refresher training.

User Groups

Staff and patients can join regular user groups for in-depth discussions.

1-1 Training

2 hours long remote session per practice covering all the key aspects of the system and information for go live.

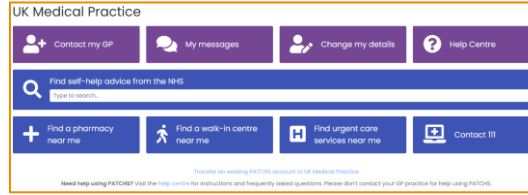
PATCHS Patient Journey



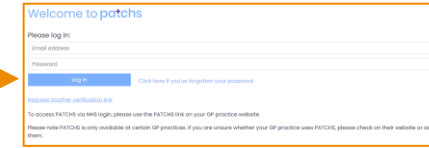
A patient has an issue and wants support from their GP practice.



The patient goes to their GP practice website and clicks on the PATCHS banner.



Patients are presented with options to Contact GP, Review Messages, Editing Details, Check Symptoms, and to find local services.

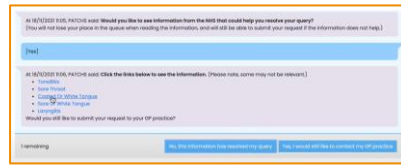


Choosing to contact their GP, they then Register, login using a PATCHS account or NHS Login, or continue without an account

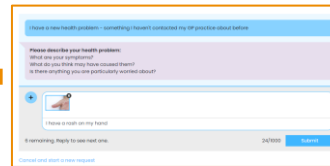


Patients then select if they are submitting a request for themselves or someone they care for (proxy)

If enabled, the Signpost AI may then ask the patient to complete relevant clinical questionnaires to gather additional information.



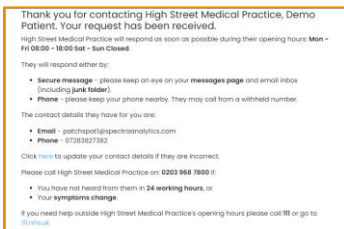
If enabled, the Signpost AI will then present relevant NHS self-help links to the patient, where upon the patient can choose to continue or cancel the request.



They then answer a few simple open-ended questions using free-text, adding images/ document at any time as required.

They are first asked if they are experiencing any 'Red Flag' symptoms. If so, they are directed to call 999 or visit A&E.

Patients then select the type of request they want help with (New Health Problem, Existing Health Problem, Repeat Medication, Admin or Other)



The patient is told how they will receive a response and the wait time. They are told to call the practice if the issue changes or if they have not heard back.

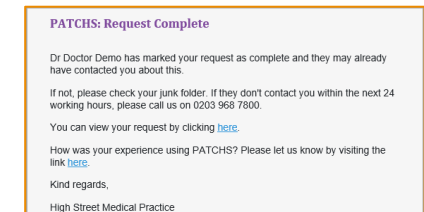


The practice reviews the request and either initiates a 2-way conversation for follow-up questions, provides advice, or arranges a consultation (telephone, video, face-to-face)

If the practice starts a conversation the patient will receive an email or SMS telling them to log into PATCHS to respond



Once the consultation is complete the patient receives a notification it is closed. They can then provide additional feedback on their experience



GP Practice Workflow

Reception review (within 1 hour of submission)

Mark urgency

Reply to patient (within 2 hours of submission)

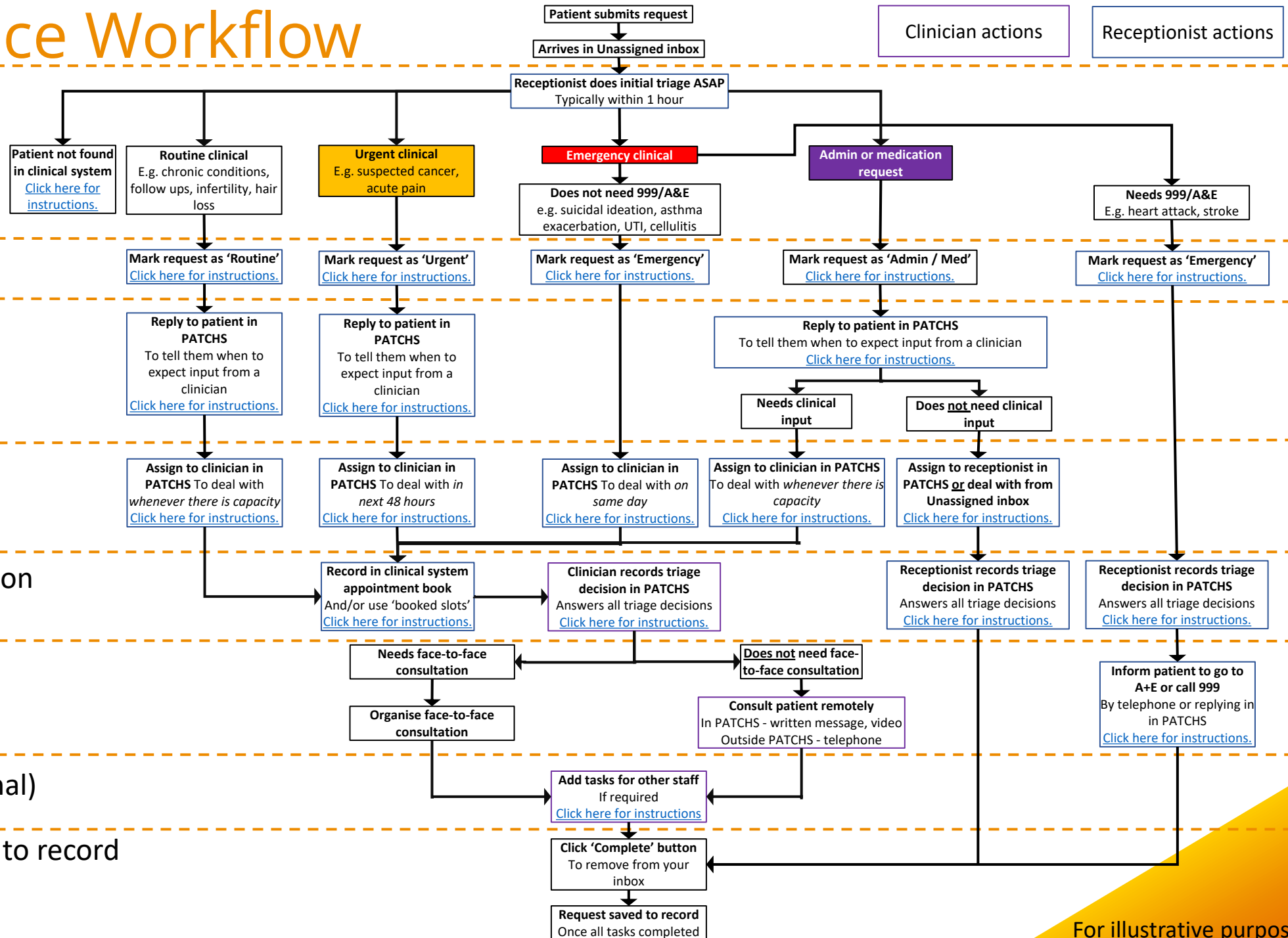
Assign to staff

Record triage decision

Consult patient

Assign tasks (optional)

Complete and save to record



For illustrative purposes only

Resources

Visit the PATCHS Help Centre (<https://help.patchs.ai/>) for all the latest guidance and help articles. Here are some of the key topics:

> Setting up PATCHS at your practice

- > [Registering your practice](#)
- > [Inviting Staff](#)
- > [Adding the PATCHS banner to your website](#)
- > [Register a test patient in PATCHS](#)
- > [Installing PATCHS on your TPP Gateway machine](#)
- > [Enabling PATCHS in the EMIS Partner API](#)
- > [PATCHS Toolbar](#)

> Promoting PATCHS to your Patients

- > [How to promote PATCHS to your patients](#)
- > [Receptionist scripts](#)
- > [Changing your telephone message](#)
- > [Sending bulk messages to patients](#)
- > [Patient welcome packs](#)

> Organising your Practice to use PATCHS

- > [Launching PATCHS at your practice](#)
- > [Key principles of using PATCHS](#)
- > [How to spread demand](#)
- > [Demand Control](#)
- > [How many PATCHS slots to offer](#)

> Clinical Safety

- > [Red Flag Symptoms](#)

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Thank You



A Provider You Can Trust