

North Devon Local Health Community

Implementation Checklist for Choose and Book

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Version Control

Version No.	Date	Changes
0.1	29 April 2005	First draft
0.2	4 May 2005	Minor amendments

1 Implementation Summary

1.1 Introduction to Choose and Book Implementation

1.1.1 The purpose of this checklist is allow all stakeholders involved in the implementation of the fully integrated Electronic Booking Service a self audit on their readiness to commence the project.

1.1.2 The stakeholders include:

- GPs and GP Practices (GP)
- Barnstaple PCT IT Department (IT)
- Training department (Trainers)
- Northern Devon Healthcare Trust (NDHT)
- PCT C&B Project team (PCT PT)
- GP System Suppliers; (GP SS)
- NHS Connections for Health (NCfH)
- Patient Administration System Suppliers (PAS)

1.2 Implementation Guidelines

1.2.1 **Figure 1** provides the draft implementation guidelines for Choose and Book.

Figure 1 – Implementation Guidelines

Topic area	Ref	Readiness criteria	Responsibility	Complete	Notes
Training	1.1	Have all the GPs been trained on the Choose and Book software?			
	1.2	Have all the Medical Secretaries been trained on the Choose and Book software?			
	1.3	Have other practice staff been trained on the Choose & Book software?			
	1.4	Have all other aspects of IT training been taken account of within each practice?			
Smartcards	2.1	Have all GPs been issued with a Smartcard?			
	2.2	Have all Medical Secretaries been issued with a Smartcard?			
	2.3	Have all other practice staff been issued with a Smartcard?			
	2.4	Do all GPs know their PIN number?			
	2.5	Do all Medical Secretaries know their PIN number?			

Topic area	Ref	Readiness criteria	Responsibility	Complete	Notes
Smartcards	2.6	Do all other practice staff know their PIN number?			
	2.7	Have all the GPs tested their PIN number and successfully logged into the Spine?			
	2.8	Have all the Medical Secretaries tested their PIN number and successfully logged into the Spine?			
	2.9	Have all other practice staff tested their PIN number and successfully logged into the Spine?			
	2.10	Is there a 'sponsor' identified with the practice?			
	2.11	Has the practice been issued with a copy of the PCT RA policy?			
PCs & Printers	3.1	Is there a printer connected to the practice network that can be used to print the Appointment Prescriptions on?			
	3.2	Is there plain A4 paper available for printing the Appointment Prescriptions on?			
	3.3	Do all the PCs that are likely to be used for doing C&B on have a Smartcard reader?			
	3.4	Has the Identity Agent software been loaded onto all PCs?			

Topic area	Ref	Readiness criteria	Responsibility	Complete	Notes
Publicity & leaflets	4.1	Does the practice have a supply of the Choose & Book patient leaflets?			
	4.2	Does the practice have a supply of the Confidentiality FAQ sheets to provide to the practice staff and if necessary to the patients?			
	4.3	Does the practice have a supply of the Consent sheets to provide to the practice staff and if necessary to the patients?			
	4.4	Does the practice have a supply of the patient questionnaire sheets to provide to the patients?			
	4.5	Does the practice have a supply of C&B posters for displaying in the waiting areas?			
	4.6	Are the secondary care clinicians fully aware of the C&B agenda?			
	4.7	Are the secondary care administrative staff fully aware of the C&B agenda?			
Bookable Services	5.1	Are all the practice staff aware of which services at North Devon Healthcare Trust are available to be electronically book?			
	5.2	Are the practice staff aware that any bookings made for 2 week wait or urgent appointments must be made while the patient is present in the surgery?			

Topic area	Ref	Readiness criteria	Responsibility	Complete	Notes
Support issues	6.1	Are the practice staff aware of the support arrangements that are in place for the initial deployment of EBS within their surgery?			
	6.2	Are the practice in possession of a copy of the support arrangements document?			
	6.3	Are the practice staff willing to share their experiences with using the C&B system with members of the Barnstaple project team and other practices within the PCT?			
	6.4	Has a 'super user' been identified within each practice?			
Technical Readiness	7.1	Has the 'End Point Registration' been completed for the NDHT PAS?			
	7.2	Has the 'End Point Registration' been completed for the each GP Practice server?			
Clinical Engagement	8.1	Have all the GPs within the PCT been offered the opportunity to hear about C&B?			
	8.2	Is the Practice Manager fully aware of the implementation timetable and agreed to the dates?			

Topic area	Ref	Readiness criteria	Responsibility	Complete	Notes
Indirectly Bookable Services	9.1	Have the procedures been put in place at NDH to receive and book appointments?			
Booking Management Service	10.1	Has the BMS been set-up?			
	10.2	Are out-of-hours covered?			
Directory of Services	11.1	Is the DoS complete for a number of specialities?			
	11.2	Are the GP practices aware which specialities are bookable?			