

choose and book

Implementation checklist: Secondary care medical secretaries

The Choose and Book team have developed an implementation toolkit to help NHS organisations establish the necessary IT and managerial systems to make Choose and Book a reality. This includes tailored guidance to suit you, whether you are a GP or practice manager, consultant or medical secretary, or involved in management, IT or support. This checklist is designed for secondary care medical secretaries.

Get Started

- Attend a locally organised awareness session and familiarise yourself with the material available which explains Choose and Book. Be aware of the link between electronic booking and choice, and the big changes it will make to how the clinical team works.
- Register to use Choose and Book by liaising with the Choose and Book team and your team leader. They will explain the level of access you will have to the system, and will provide you with the smartcard required to access Choose and Book on the PC. Local support will be available to answer any questions and help you get started, and you should ask your team leader who to contact if you need help with any issues.

Changes to process

- Recognise the changes in culture and ways of working, which Choose and Book will necessitate and work out how best to use the system within the team you work in.
- Arrange with your team leader and the local Choose and Book team to undergo appropriate training on how to use the system. There may also be various local training materials available through the local training manager. The online training tool is also available for you to refresh your training at any time you choose to do so.
- If you have any problems logging into Choose and Book on your PC, contact your local IT department.

Using the system

- Check the referral worklists for your consultant(s) on a daily basis to ensure they are alerted to referrals coming through.
- You may be required to print off patient referrals for the consultant(s) as determined by local processes. It will not be possible to do this unless you were allocated the correct level of access at time of registration. Please contact the local Choose and Book team if:
 - You are able to see referrals for services which you would not expect to see.
 - You become aware of the absence of referrals for a service which you would expect to see.
- If local processes require it, respond to referrals in consultants' absence based on their written instructions.

For the full toolkit and other checklists see www.chooseandbook.nhs.uk/implementation