Care Navigation Templates

How to use these templates

Receptionists will only be able to navigate patients when they have the relevant information, so it is important that all health professionals in the GP practice help to encourage patients to use their receptionist team wisely.

Complete these templates with the relevant professional, staff member, Practice Manager, receptionist and lead GP. These templates are intended to support staff managing the phone lines and front desk so should be easy to read, understand and use.

These versions include example text that will vary between GP practices, so it is important to complete them with your staff and ensure they suit your local context, procedures and circumstances.

Once these templates have been co-developed, clinical staff and local partner services should feed back to the reception team if they find there are instances of inappropriate care navigation which has failed to best serve the patient's needs. These templates can then be reviewed and updated with the most appropriate guidance and actions.

Staff should be reassured that the patient will get to the right person, even if they have been navigated to someone else by the reception team. The new health staff in your GP practice are highly skilled professionals and will always call on the GP if they think that is best for the patient.

Use the section on "Frequently Asked Questions" to collate ongoing questions from all staff and local services about the procedures as they arise which the whole team should then review and consider at regular intervals to improve processes to ensure safety, effectiveness and efficiency.

Care Navigation Template – Primary Care Mental Health Nurse

GP practice _____

1. **What job title or name will you use for the staff member?**

- Primary Care Mental Health Nurse? Mental Health Nurse? Use their name?

2. **Key words for receptionist/call handler to look out for:**

- Anxiety
- Depression
- Sleeping problems
- Bereavement or loss of a loved one
- Medication (anti-depressants)

3. **If a patient walks in requesting an appointment:**

- Do not ask them for a reason for their visit
- Ask if they know who they would like to see
- If they say no advise of the options available or offer a leaflet explaining the health professionals or offer a GP appointment

4. **Appointment types:**

- An appointment time of X minutes should be offered for all mental health patients
- When should you offer a phone appointment or a video call (Near Me/Attend Anywhere) appointment?

5. **What kind of concerns should go to a GP?**

- Suicidal thoughts
- Children and teenagers (anyone under 18)

6. **If a patient is not comfortable telling you the reason for their call:**

- Direct the appointment straight to the GP but write in the slot note that the patient was asked, so the GP can explain there are now additional people in the GP practice who can help

7. **Follow-up appointments:**

- If the patient requires a follow-up, check with the Mental Health Nurse and book them in

8. **Frequently asked questions and answers:**

- Q
- A

Care Navigation Template – Advanced Physiotherapy Practitioner (APP)

GP Practice_____

1. **What job title or name will you use for the staff member?**

- Advanced physiotherapist? Name?

2. **Key words for the receptionist/call handler to look out for:**

- Had a fall
- Joint pains
- Difficulty walking or moving

3. **If a patient walks in requesting an appointment:**

- Do not ask them for a reason for their visit
- Ask if they know who they would like to see
- If they say no advise of the options available or offer a leaflet explaining the health professionals or offer a GP appointment

4. **Appointment types:**

- An appointment time of X minutes should be offered for all APP appointments
- When should you offer a phone appointment or a video call (Near Me/Attend Anywhere) appointment?

5. **What kind of concerns should go to a GP?**

- Multiple concerns about different health issues
- Follow-up appointments
- Children and teenagers (anyone under 18)

6. **If a patient is not comfortable telling you the reason for their call:**

- direct the appointment straight to the GP but write in the slot note that the patient was asked, so the GP can explain there are additional people now in the GP practice who can help

7. **Follow-up appointments:**

- If the patient requires a follow-up, check with the APP and book them in

Care Navigation Template – Advanced Nurse Practitioner (ANP)

GP Practice _____

1. **What job title or name will you use for the staff member?**
- Try not to say ANP unless the patient says this first – use the full term

2. **What type of appointment will your ANP see?**
- x
- x

3. **If a patient walks in requesting an appointment:**
- Do not ask them for a reason for their visit
- Ask if they know who they would like to see
- If they say no advise of the options available or offer a leaflet explaining the health professionals or offer a GP appointment

4. **Appointment types:**
- An appointment time of X minutes should be offered for all Advanced Nurse Practitioner appointments
- When should you offer a triage appointment: x x x x x
- When should you offer a phone appointment or a video call (Near Me/Attend Anywhere) appointment?

5. **What kind of concerns should go to a GP?**
- Multiple concerns about different health issues
- Follow-up appointments
- Children and teenagers (anyone under 18)

6. **If a patient is not comfortable telling you the reason for their call:**
- Direct the appointment straight to the GP but write in the slot that the patient was asked, so the GP can explain there are additional people now in the GP practice who can help

7. **Follow-up appointments:**
- If the patient requires a follow-up, check with the ANP and book them in

8. **Frequently asked questions and answers:**
- Q “Is this the same as the practice nurse?”
- A

Care Navigation Templates – Services outside the GP practice

The following templates may be used to help patients see the right person at the right time. These templates should be completed with your local services, for example:

a) **Community pharmacies**
b) **Opticians**
c) **Dentists**

When discussing with the staff member be sure to agree on some signposting guidelines that suit both the GP practice and the patient. If a patient is correctly signposted by the receptionist, but the service uncovers some further complications – agree what steps should be followed. For example:

Patient X spoke to the receptionist and explained she had a urine infection. The patient was 25 and noted she had no other medical issues. The receptionist suggested she may prefer to go straight to her pharmacy. When she visited the pharmacy, it turned out the patient was six months pregnant so could not receive treatment there. She was given a 'situation, background, assessment and recommendation (SBAR)' form completed by the pharmacist that said she should see her GP within three days. The pharmacist also agreed with the GP practice that if this should happen, she would also send an SBAR directly to them. The reception team were contacted and booked the patient the next available appointment.

When creating these guidelines, you should gather the following information to create a comprehensive navigation tool for your reception team. See the example from Forth Valley below:

Service name	Opening times	Useful information	Signposting patients
Forth Valley Pharmacy	Mon Fri: 8am to 6pm Sat: 8am to 5pm Sun: 8am to 2pm	On Thursdays the pharmacy has a locum and therefore will be unlikely to provide Pharmacy First Service as the pharmacist hasn't been trained	Pharmacist agrees to see all patients sent by the practice – if there are any issues the pharmacist will send the patient back and call the practice

Draft Examples

Another option for patients is to see someone outside of the GP practice. Other professionals that may have additional training and better equipment than GPs or nurses deal with many health concerns. These include the services below.

Pharmacy First – must complete with your community pharmacist for all potential conditions, click the link here for the latest Pharmacy First Signposting Guidance for practices that you can also use to develop your procedures.

1. **If the patient says they have a UTI:**
   - Are they female?
   - Are they under the age of 65?
   - Do they have any other complex conditions such as x XXXXXXXX

   = the patient may prefer to visit their local pharmacy for free treatment

2. **If the patient says they have vaginal thrush:**
   - Is the patient under 65 and over the age of X?
   - Is this a new case?

   = the patient may prefer to visit their local pharmacy for free treatment

3. **If the patient says they have XXX**

   = xxx

Optician - must be complete with your local optician.

1. **If the patient says they have sore or red eyes:**
   - Are they under x
   - Do they have any complex medical needs?
   - The patient may prefer to see their local optician
   - Explain that the doctor has no equipment and no specialist training to look at eyes

Dentist – must be complete with your local dentist

1. **If the patient mentions any issues with their teeth:**
   - Check there are no other medical concerns such as sore heads
   - Explain to the patient that the doctor has no equipment and no training to examine teeth and the patient may prefer to see their local dentist