



**Morecambe Bay**  
Clinical Commissioning Group



Healthier  
**Lancashire &  
South Cumbria**

University Hospitals  
of Morecambe Bay  
NHS Foundation Trust



**Advice & Guidance**

## **The Morecambe Bay Solution**

**Dr George Dingle**

**Clinical Lead Advice & Guidance, Primary Care Lead Digital Health**

**27<sup>th</sup> November 2018**

**NHS**

**Morecambe Bay**  
Clinical Commissioning Group



Healthier  
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**NHS**

**Advice & Guidance**

**A bespoke, locally-developed, secure, easy to use, web-based messaging system which allows GPs to have timely dialogue with local specialists about specific patients and their conditions**

## What did we do and why?

- **Unsuccessful pilot using existing national functionality**
- **Lessons learnt**
- **Small team, collaborative, low budget approach**
- **Bespoke local solution created**
- **New pilot**
- **Pilot evaluation – formalised to full service**

## Advice & Guidance

### It's about.....

- **Providing a really easy to use electronic system connecting GPs with local specialist colleagues to discuss our patients specific cases**
- **GPs learn from the dialogue and patients benefit from timely specialist advice**
- **We use the system for elective care (ie non urgent care)**
- **If a system is easy to use and is well liked by its users it will be used**
- **Communication in real time terms between GP and specialist improves patient care in a variety of ways**
- **The system is also secure and collects data allowing monitoring of impact on patient care**

# COMMUNICATION BETWEEN CLINICIANS.....IMPROVES PATIENTS' JOURNEYS

Key objective – to improve **integrated working and communication** between primary and secondary care



But other benefits include **reduction in need for outpatient appointments, promotes team-working, empowers GP's and is a powerful educational tool**



A quick walk-through of the IT system.....

# Easy access from EMIS consultation screen.....

EMIS Web Health Care System - GARSTANG MEDICAL PRACTICE - 2641

MICKEY, Mouse (M)

Summary Consultations Medication Problems Investigations Care History Diary Documents Referrals Growth Charts New Consultation

Save Next Problem Confidentiality Sharing Online Visibility

09-Nov-2017 17:34  
DINGLE, George Edward (Dr)  
GP Surgery  
Garstang Medical Practice

Run Template Book Appointment Create Task Medication Regime Review Add Fit Note Spell check

Print Configure Search

Report Management - 11 SCR - 13 Test Requests - 60 Referrals - 14 (14) Documents - 1 GP2GP - 9 (9) Registration - 491 (118) Lab Reports - 1 (1) Tasks - 6 [1 more](#)

Active MICKEY, Mouse (Mr) Born 01-Jan-2005 (12y 10m) Gender Male NHS No. Unknown Usual GP ASHCROFT, Margaret (Dr)

View -> My Record

My Record  
All Records

External Views  
Summary Care Record  
**Advice and Guidance**

Consultation 1. <No Problem>

Date	Procedure	GP Surgery (Garstang Medical Practice)	EVANS, Susan (Mrs)
02-Nov-2017	History	Has never had a reaction to previous flu vaccines • Has never had a reaction to any vaccination • Has no severe allergies to eggs • Patient feels well • Side effects of vaccination discussed	
	Assessment	Needs influenza immunisation	
26-Oct-2017	Procedure	Minor surgery done - injection Manufacturer: xx, Expiry Date: 28-Oct-2017, Batch Number: xx, Injection site: Left arm • Steroid injection into lateral epicondyle tendon of humerus Laterality: Left • Informed consent for procedure • Risk of Infection • Risk of Haemorrhage/Haematoma • Risk of Late Tendon Damage • Risk of Nerve Damage	

Latest Contacts

Summary Detailed

Summary  
Diary  
Clinical...  
Diary... 11-Oct-2006  
Diary... 31-Dec-2008  
Problems  
Active Problems  
Care plan  
Seasonal influenza vac...  
Hypothyroidism  
Infectious and parasiti...  
Administration  
Medication  
Acute  
Dermol 500  
Inactivated Influenza (Split Virion)  
Leflunomide • Paracetamol  
Allergies  
Allergy to bananas

NHS Clinical Practitioner | DINGLE, George Edward (Dr) | Organisation: GARSTANG MEDICAL PRACTICE | Location: Garstang Medical Practice | In Consultation Alerts

# The new conversation page.....key patient details automatically pulled across from EMIS GP system

## New Conversation

To start a new request for advice and guidance, enter the patient's information below, select a specialty and then enter your query. When you hit 'Send' your question will be sent instantly to available care providers in the selected specialty.

### 1. Patient Details

Patient Name:	<input type="text"/>	NHS Number:	<input type="text"/>
Date of Birth:	<input type="text"/>	Gender:	<input type="text"/>

### 2. Message Details

Specialty:	<input type="text"/>	Request telephone conversation:	<input type="radio"/> Yes <input type="radio"/> No
------------	----------------------	---------------------------------	--

[Change Telephone Availability](#)

### 3. Message Content

 [Add attachment](#)

Send Message

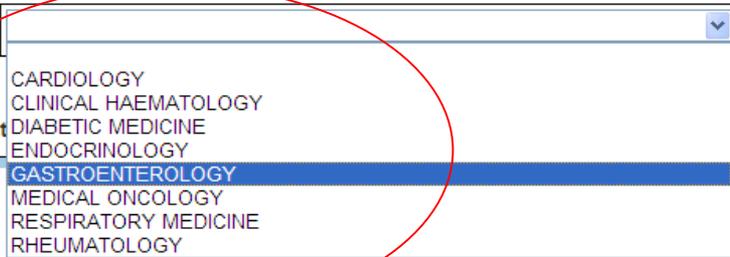
# Select a speciality from list.....

To start a new request for advice and guidance; enter the patient's information below, select a treatment function and then enter your query. When you hit 'Send' your question will be sent instantly to available care providers in the selected treatment function.

## 1. Patient Details

Patient Name:	xxxxxxxxxxxxxxxxxxxx	NHS Number:	123456789
Date of Birth:	1/1/12	Gender:	Transgender

## 2. Message Details

Treatment Function:		Request telephone conversation:	<input type="radio"/> Yes <input checked="" type="radio"/> No
---------------------	--	---------------------------------	---

[Change Telephone Availability](#)

## 3. Message Content

 [Add attachment](#)

Send Message

# Type message and send.....

## New Conversation

To start a new request for advice and guidance, enter the patient's information below, select a specialty and then enter your query. When you hit 'Send' your question will be sent instantly to available care providers in the selected specialty.

### 1. Patient Details

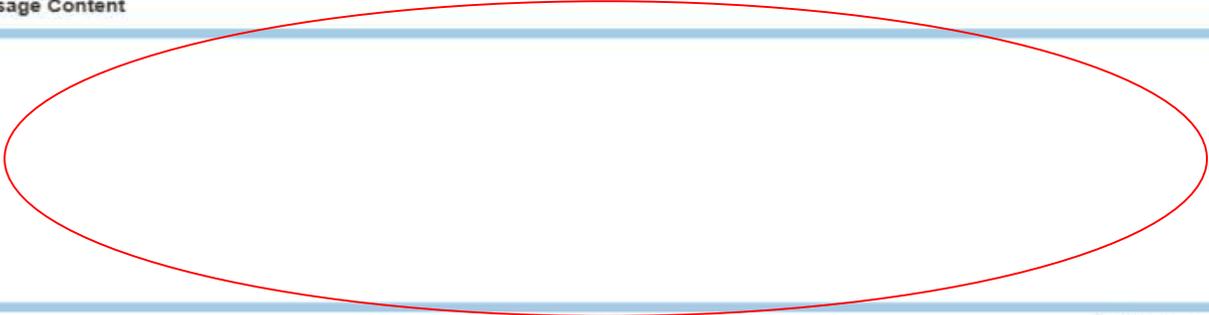
Patient Name:	<input type="text"/>	NHS Number:	<input type="text"/>
Date of Birth:	<input type="text"/>	Gender:	<input type="text"/>

### 2. Message Details

Specialty:	<input type="text"/>	Request telephone conversation:	<input type="radio"/> Yes <input type="radio"/> No
------------	----------------------	---------------------------------	--

[Change Telephone Availability](#)

### 3. Message Content



[Add attachment](#)

Send Message

# Add attachment functionality if you wish (ECG's, photos of rashes).....

## New Conversation

To start a new request for advice and guidance, enter the patient's information below, select a specialty and then enter your query. When you hit 'Send' your question will be sent instantly to available care providers in the selected specialty.

### 1. Patient Details

Patient Name:	<input type="text"/>	NHS Number:	<input type="text"/>
Date of Birth:	<input type="text"/>	Gender:	<input type="text"/>

### 2. Message Details

Specialty:	<input type="text"/>	Request telephone conversation:	<input type="radio"/> Yes <input type="radio"/> No
------------	----------------------	---------------------------------	--

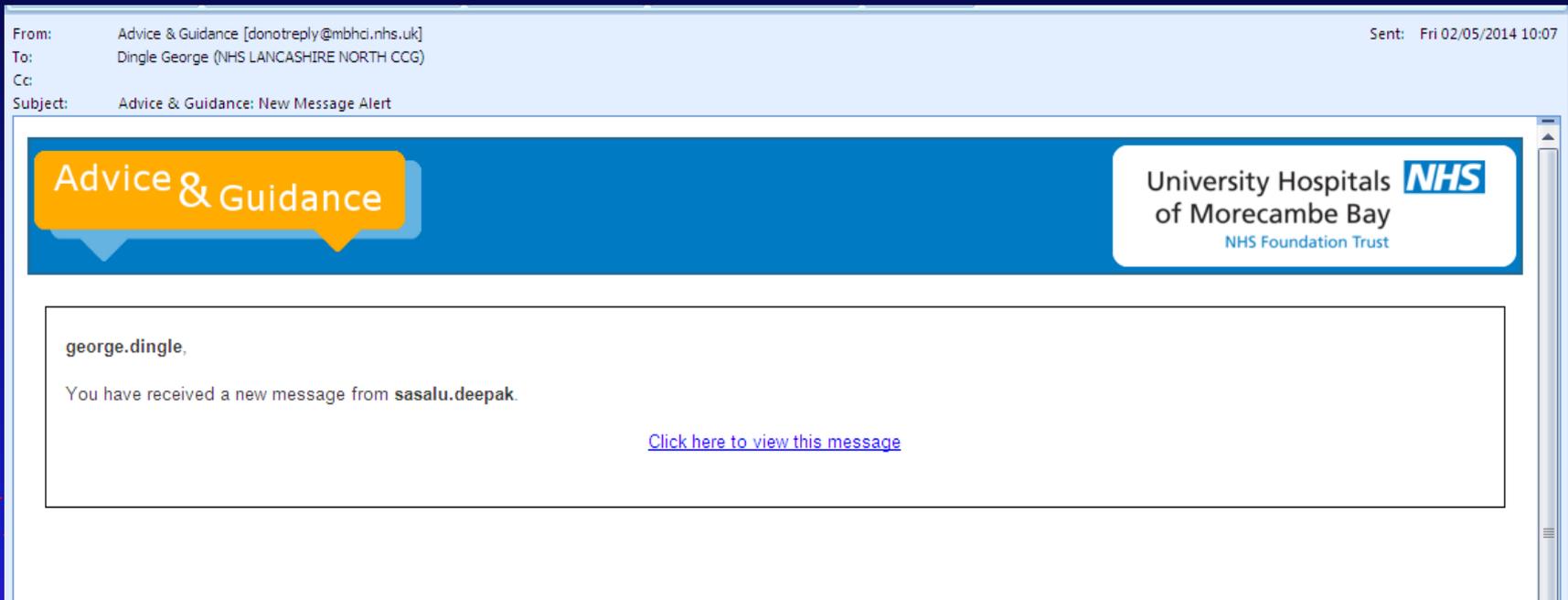
[Change Telephone Availability](#)

### 3. Message Content

 [Add attachment](#)

Send Message

Instant notification to your local consultant's email to inform them there is an advice request and also similar notification to GP of message reply



Quick link within email directing user straight to relevant advice conversation

# The conversation page.....easy to follow graphics with colour coding for contributors to the conversation

## Conversation

Patient Name: **Test Patient**      DOB: **01/01/1970**      Gender: **Male**      NHS No.: **NHS1234567890**

Specialty: ENT      Initiated: 16/01/2013 12:51:47      Status: New Message

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Mauris sagittis justo at velit sagittis suscipit. Aliquam erat volutpat. Nam pretium auctor diam, ac dapibus tellus viverra non. Fusce tincidunt, tortor nec porta ultrices, augue diam suscipit diam, id malesuada felis mauris tempor tortor.

Sent by matt.heys Jan 16 2013 12:52PM

Donec tellus mi, placerat ac cursus eu, ornare iaculis diam. Proin vitae neque id erat ornare condimentum sit amet dignissim metus. Vestibulum a nulla ut dui iaculis sollicitudin dictum nec libero. Vivamus pharetra imperdiet enim, eu mollis sapien elementum vitae.

Sent by marc.hadwin Jan 16 2013 2:01PM

Send a response / close the conversation

 [Add attachment](#)

# Closing the conversation, record drops into EMIS EPR

**Advice & Guidance**

University Hospitals **NHS**  
of Morecambe Bay  
NHS Foundation Trust

Home : Conversation Login

### Conversation

<b>Patient's Name:</b> John Smith	<b>DOB:</b> 01/01/1970
<b>NHS Number:</b> NHS123-456-7890	<b>Sex:</b> Male

**Subject: Neurology - Initiated: 14/11/2012 13:54 - Status: Open (Responded)**

Patient is presenting with symptoms of severe migrains sporadically. Patient has a history of migrains and states that three close family members have been diagnosed with brain tumours in the last 5 years. Patient has mentioned they are under a particularly high level of stress at the moment both at work and at home.

I've advised the patient to try to reducing their stress levels however given the family history of brain tumours, should I refer to UHMB for further investigation?

Sent by Matt Heys (GP12345 Fiction Practice, Lancaster) 14/11/2012 13:54

Given the family history I would advise refering the patient to the neurology department as a routine referral to conduct further investigations.

Sent by Marc Hadwin (Royal Lancaster Infirmary) 14/11/2012 14:32

**Send a response / close the conversation**

 [Add attachment](#)

Morecambe Bay Health Informatics © 2012

Automatic feedback pro-forma activates on closing conversation to allow monitoring / audit of the impact and user experience of service (quick and snappy, GP's don't mind doing this)

Home : [Inbox](#) : Conversation Logged in as: [matt.heys](#) ([Logout](#))

**Conversation**

Patient Name: **Test Patient**

Specialty: ENT    Initiated: 16/01/2013

Lorem ipsum dolor sit amet, consetetur elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et dolor sit amet, consectetur adipiscing elit, sed diam nonummy nibh euismod tincidunt, tortor nec porta ultricies. Sent by matt.heys Jan 16 2013

Donec tellus mi, placerat ac cursus libero. Vivamus pharetra imperdiet. Sent by matt.heys Jan 16 2013 2:01PM

Send a response / close the conversation

### GP Feedback

Please complete the following feedback form regarding this conversation:

How straightforward did you find the process of requesting advice and guidance?	<input type="text" value="Easy"/>
How useful did you find the advice you received?	<input type="text" value="Really useful"/>
Comments about usefulness:	<input type="text"/>
Has the advice given altered your management of the patient?	<input checked="" type="radio"/> Yes <input type="radio"/> No
If yes, how?	<input type="text"/>
Have you gone on to refer this patient as a formal outpatient referral?	<input type="radio"/> Yes <input checked="" type="radio"/> No <input type="radio"/> N/A - Referral already in progress
How do you think you would have dealt with this case if this advice and guidance service was not available?	<input type="text" value="Refer to outpatients"/>
If other, please provide details:	<input type="text"/>
Do you have any other suggestions to improve this service?	<input type="text"/>

NHS1234567890

ibus tellus viverra non. Fusce

iaculis sollicitudin dictum nec

Sent by matt.heys Jan 16 2013 2:01PM

Morecambe Bay Health Informatics © 2013



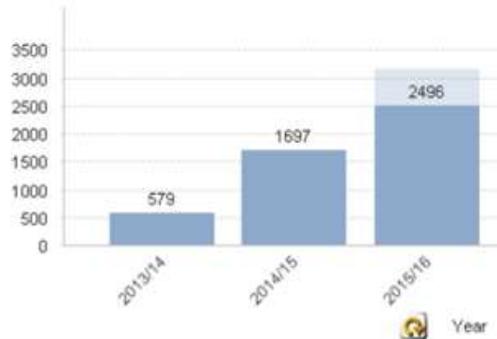
Last reload: 14/01/2016 09:01

Search

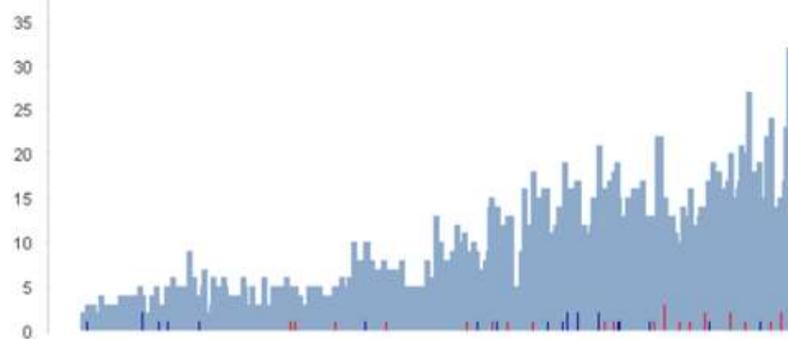
Current Selections

2015/16 2014/15 2013/14  
 Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar

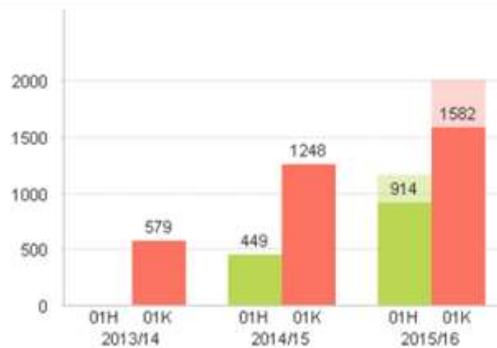
Requests Made (Year view)



Requests Made (Daily view)



CCG



Organisations/Specialties using

Specialty	2013/14			2014/15			2015/16		
	Users	Convs	Est	Users	Convs	Est	Users	Convs	Est
CLINICAL HAEMATOLOGY	52	121		139	319		150	416	111
GASTROENTEROLOGY	43	108		99	230		123	280	75
RHEUMATOLOGY	52	127		97	208		114	271	72
RADIOLOGY	0	0		90	321		104	474	127
CARDIOLOGY	31	66		91	188		99	196	52
PAEDIATRICS	0	0		53	91		83	150	40
RESPIRATORY MEDICINE	22	34		43	63		68	92	25
DIABETIC MEDICINE & ENDOCRINOLOGY	50	108		61	128		66	156	42
UROLOGY	0	0		0	0		59	108	29
BIOCHEMISTRY	0	0		55	101		54	88	24
GYNAECOLOGY	0	0		0	0		52	82	22
ENT	0	0		3	3		29	39	10
MEDICAL ONCOLOGY	8	10		29	36		26	38	10
TRAUMA & ORTHOPAEDICS (CUMBRIA CCG ...	0	0		0	0		26	45	12
CARE OF THE ELDERLY	0	0		0	0		20	25	7
GYNAECOLOGY - COLPOSCOPY	0	0		0	0		6	7	2
PALLIATIVE CARE - MON TO FRIDAY - REPO...	4	5		9	9		6	24	6
XX - DO NOT USE - DERMATOLOGY	0	0		0	0		2	5	1

01H 01K

Specialty

- BIOCHEMISTRY 189
- CARDIOLOGY 450
- CARE OF THE ELDERLY 25
- CLINICAL HAEMATOLOGY 856
- DIABETIC MEDICINE & ENDOCRINOLOGY 392
- ENT 42
- GASTROENTEROLOGY 618
- GYNAECOLOGY 82
- GYNAECOLOGY - COLPOSCOPY 7
- MEDICAL ONCOLOGY 84
- PAEDIATRICS 241
- PALLIATIVE CARE - MON TO FRIDAY - REPO... 38
- RADIOLOGY 795
- RESPIRATORY MEDICINE 189
- RHEUMATOLOGY 606
- TRAUMA & ORTHOPAEDICS (CUMBRIA CCG ... 45
- UROLOGY 108
- XX - DO NOT USE - DERMATOLOGY 5

Consultant   
 Duration group   
 GP code   
 Radiology/Requests

< Undo > Re-do X Clear All



Last reload: 14/01/2016 09:01

Search

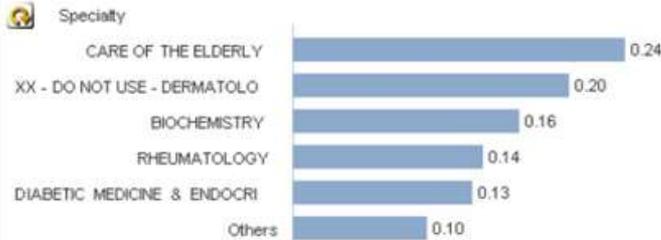
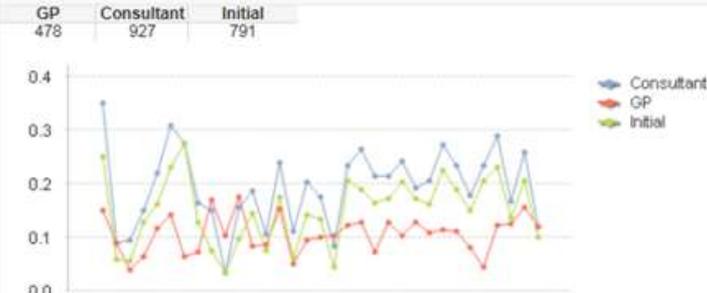
Current Selections

2015/16 2014/15 2013/14  
Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar

380 Conversations open

Duration	#	Awaiting 1st	Awaiting GP	Awaiting Cons	Awaiting Spc Own	Thanks?
	<b>380</b>	<b>3</b>	<b>295</b>	<b>7</b>	<b>34</b>	<b>41</b>
00 - 01 day	13	0	9	0	4	0
01 - 07 days	62	1	36	1	17	7
07 - 14 days	20	0	18	0	0	2
14 - 28 days	33	0	25	3	0	5
28 - 90 days	55	1	40	2	9	3
90 - 365 days	113	1	99	1	3	9
over 1 year old	84	0	68	0	1	15

Breaches & average number of breaches per conversation



GP breaches

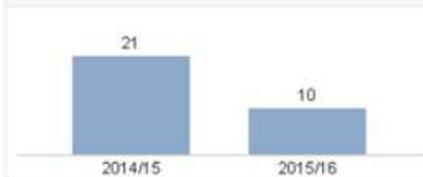
Monthly initial response (Avg 3.67 days)



Forced Closures



Telephone requests



Average messages per conversation



01H 01K

Specialty

- BIOCHEMISTRY 189
- CARDIOLOGY 450
- CARE OF THE ELDERLY 25
- CLINICAL HAEMATOLOGY 856
- DIABETIC MEDICINE & ENDOCRINOLOGY 392
- ENT 42
- GASTROENTEROLOGY 618
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- UROLOGY 108
- XX - DO NOT USE - DERMATOLOGY 5

Consultant

Duration group

GP code

RadiologyRequests

Last reload: 14/01/2016 09:01

Search

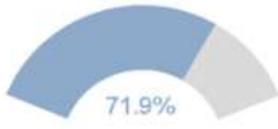
Current Selections

2015/16 2014/15 2013/14

Apr May Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar



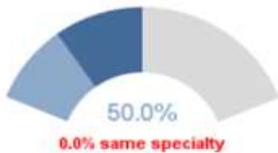
Resulting treatment changed



Change to initial treatment following use of Advice & Guidance

Before A&G	After A&G	Total	Admit	Carry out further investigations	Manage patient's care myself	Other	Radiology test sanctioned	Refer to outpatients	Seek advice from another
Admit		42	10	3	7	2	3	15	2
Carry out further investigations		299	1	113	86	25	11	56	7
Manage patient's care myself		267	-	8	194	12	1	39	13
Other		257	2	14	54	139	7	32	9
Refer to outpatients		2492	3	449	874	124	177	830	35
Seek advice from another source		995	4	122	553	85	18	160	53

IP referral within 6 months\*



by Organisation or Specialty

Specialty	Convs	Treatment changed	IP referral within 6 months	Same specialty
CLINICAL HAEMATOLOGY	856	71.3%	11.0%	0.0%
RADIOLOGY	795	81.8%	10.2%	0.0%
GASTROENTEROLOGY	618	65.5%	11.7%	4.2%
RHEUMATOLOGY	606	69.3%	9.7%	0.0%
CARDIOLOGY	450	76.4%	11.6%	0.0%
DIABETIC MEDICINE & ENDOCRINOLOGY	392	73.0%	9.4%	0.0%
PAEDIATRICS	241	61.4%	1.7%	1.2%
BIOCHEMISTRY	189	84.7%	5.8%	0.0%
RESPIRATORY MEDICINE	189	64.0%	9.5%	0.0%
UROLOGY	108	63.0%	4.6%	0.0%
MEDICAL ONCOLOGY	84	66.7%	16.7%	0.0%
GYNAECOLOGY	82	69.5%	6.1%	0.0%
TRAUMA & ORTHOPAEDICS (CUMBRIA)	45	68.9%	4.4%	0.0%
ENT	42	40.5%	4.8%	0.0%
PALLIATIVE CARE - MON TO FRIDAY - REPO...	38	89.5%	15.8%	13.2%
CARE OF THE ELDERLY	25	68.0%	28.0%	0.0%
GYNAECOLOGY - COLPOSCOPY	7	85.7%	14.3%	0.0%
XX - DO NOT USE - DERMATOLOGY	5	60.0%	20.0%	0.0%

42 patients would have been admitted and after Advice & Guidance, 10 patients were still admitted.

A further 11 had further investigation but were subsequently admitted within 6 months (0 of the further patients were referred to IP under the same specialty.)

01H

01K

Specialty

<input type="checkbox"/> BIOCHEMISTRY	189
<input type="checkbox"/> CARDIOLOGY	450
<input type="checkbox"/> CARE OF THE ELDERLY	25
<input type="checkbox"/> CLINICAL HAEMATOLOGY	856
<input type="checkbox"/> DIABETIC MEDICINE & ENDOCRINOLOGY	392
<input type="checkbox"/> ENT	42
<input type="checkbox"/> GASTROENTEROLOGY	618
<input type="checkbox"/> GYNAECOLOGY	82
<input type="checkbox"/> GYNAECOLOGY - COLPOSCOPY	7
<input type="checkbox"/> MEDICAL ONCOLOGY	84
<input type="checkbox"/> PAEDIATRICS	241
<input type="checkbox"/> PALLIATIVE CARE - MON TO FRIDAY - REPO...	38
<input type="checkbox"/> RADIOLOGY	795
<input type="checkbox"/> RESPIRATORY MEDICINE	189
<input type="checkbox"/> RHEUMATOLOGY	606
<input type="checkbox"/> TRAUMA & ORTHOPAEDICS (CUMBRIA CCG ...	45
<input type="checkbox"/> UROLOGY	108
<input type="checkbox"/> XX - DO NOT USE - DERMATOLOGY	5

Consultant

Duration group

GP code

RadiologyRequests

< Undo

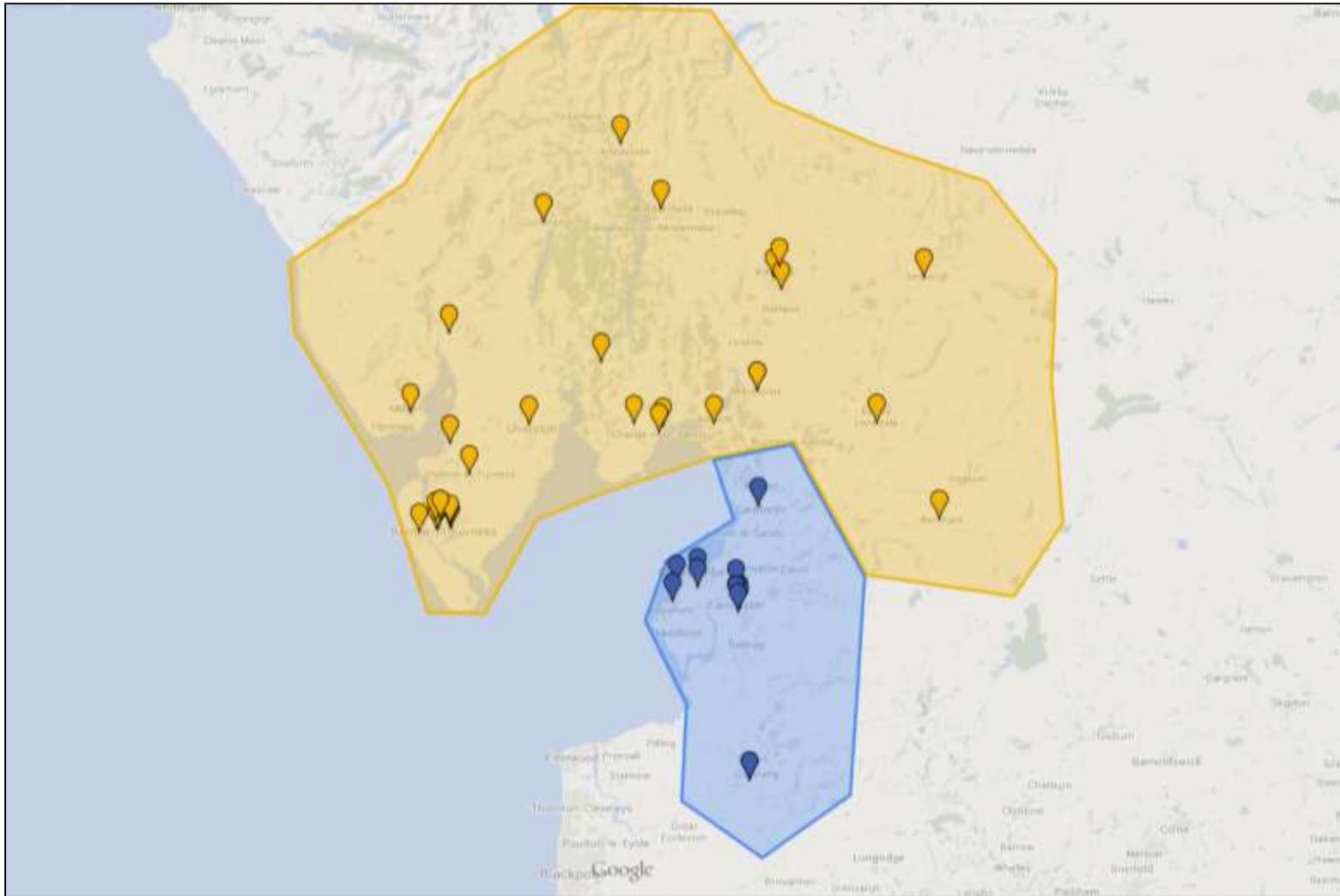
> Re-do

X Clear All



# Current Coverage

Advice & Guidance



Lancashire North  
Clinical Commissioning Group

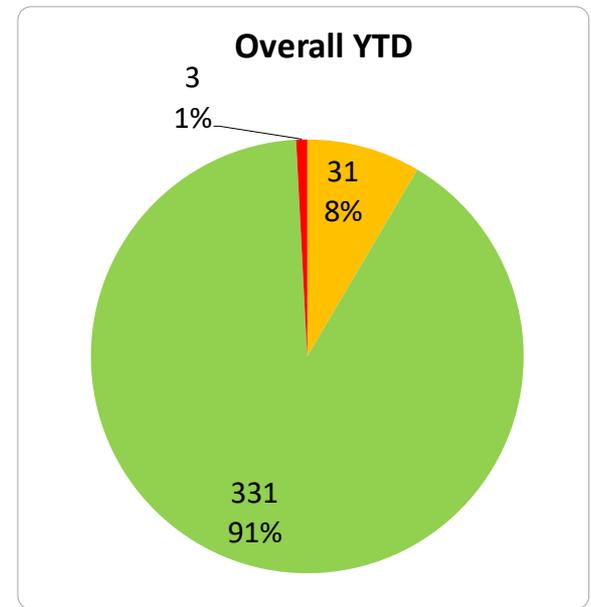
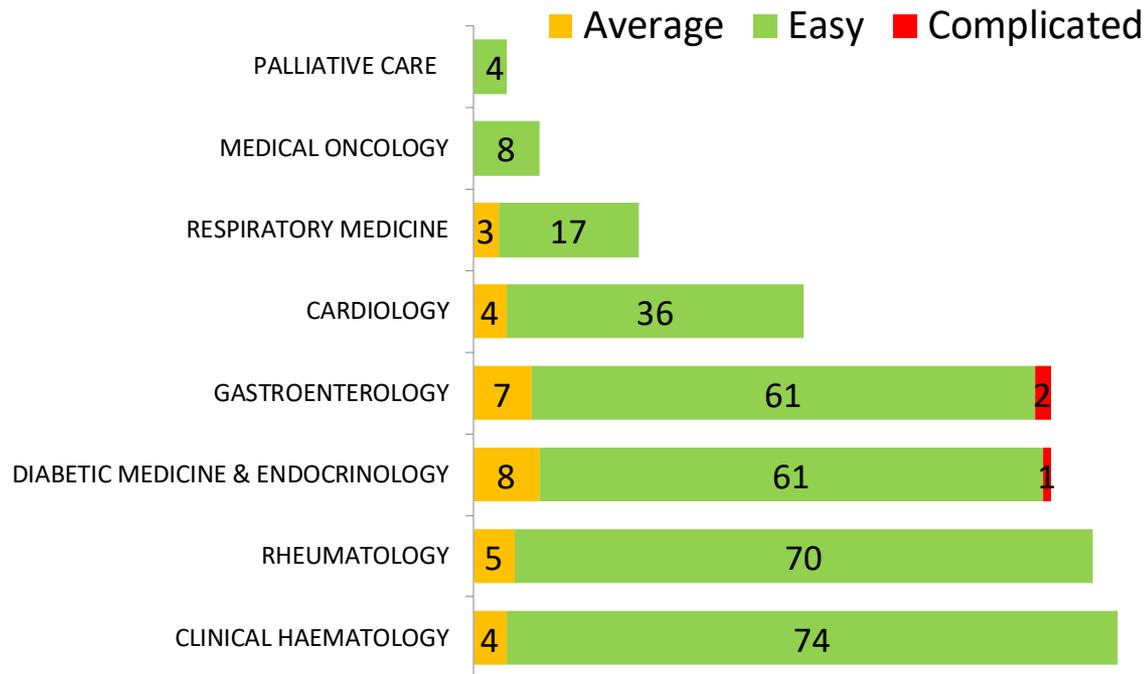


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NHS Foundation Trust



## Advice & Guidance

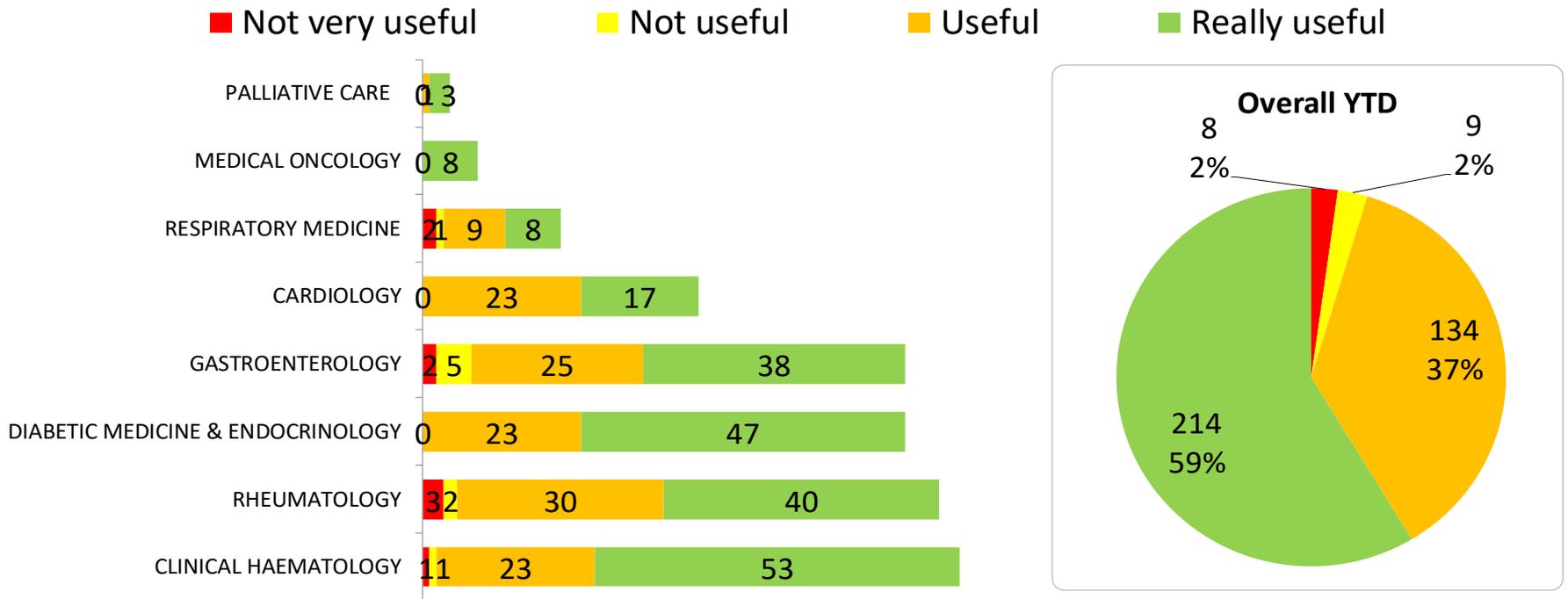
### How straightforward did you find the service?



- 91% of GP's reported the system as 'easy' to use

## Advice & Guidance

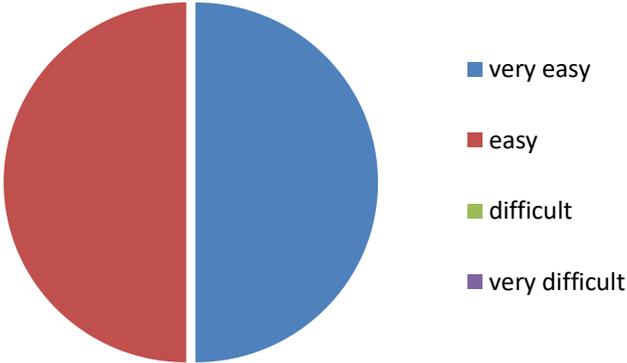
### How useful did you find the advice you received?



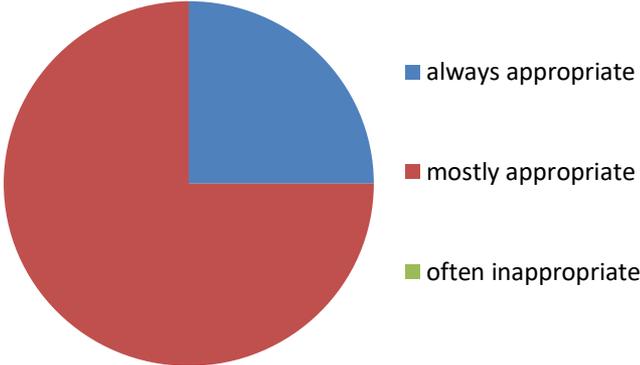
- 96% of GP's reported advice received as 'really useful' or 'useful'

# Consultant feedback.....

### Ease of use



### Appropriateness of request



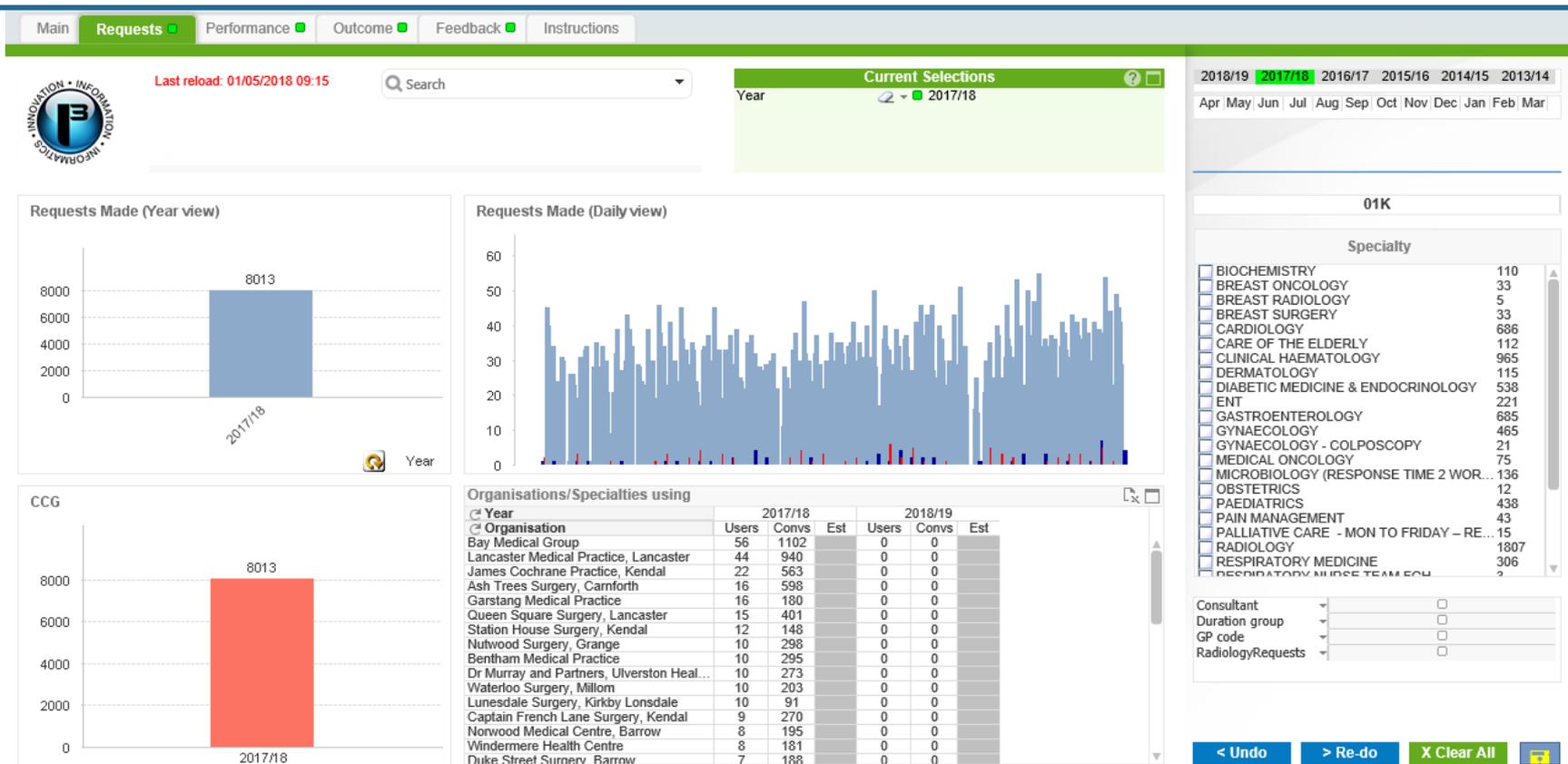
“Prevents people from coming into hospital”

“Best invention in this area in a very long time”

“Works exceptionally well”

# Requests

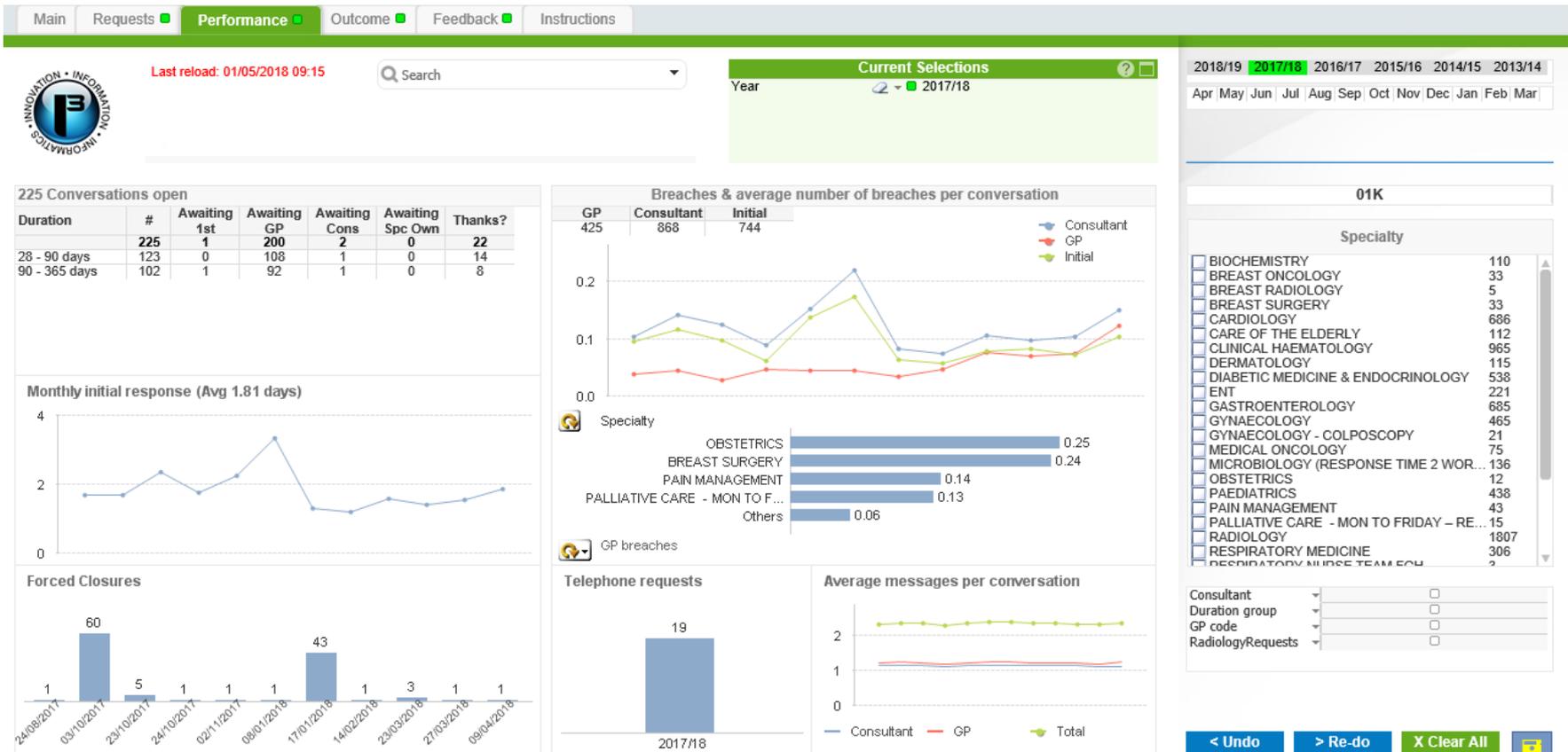
8013 Conversations  
Up from 5332 in 2016/17



# Performance

Advice & Guidance

Average of 1.81 days for conversation response



# Outcomes

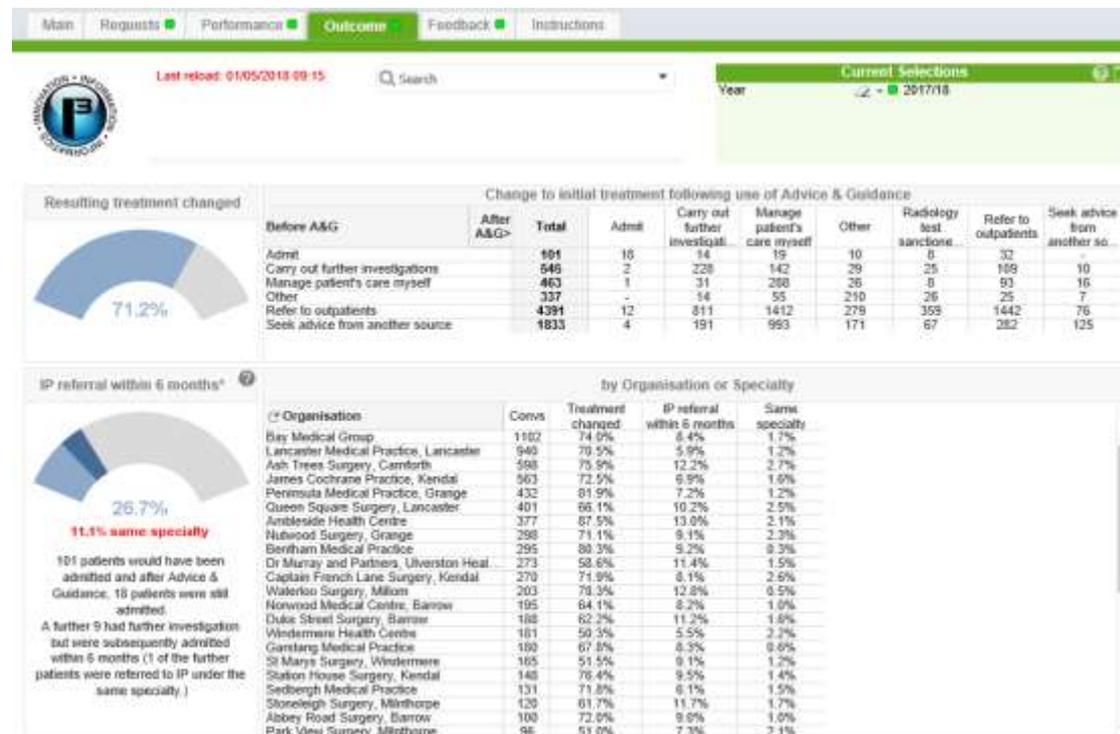
## Key Outcomes

71.2% of Conversations changed the patients Pathway

2408 Outpatient Referrals avoided

4391 → 1442

64 GP Admissions Avoided



94.8% of users say A&G is easy to use

92% of Advice given rated as Useful or Really Useful

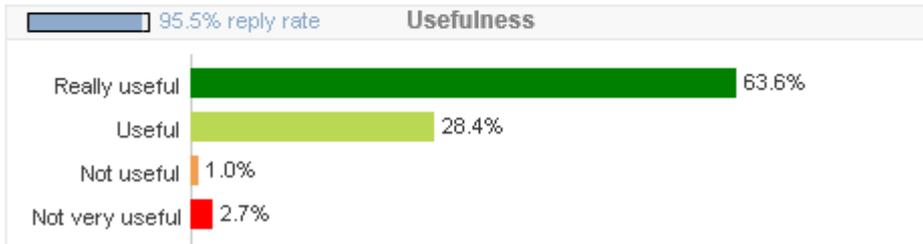
Main Requests Performance Outcome **Feedback** Instructions

Last reload: 01/05/2018 09:15

Search

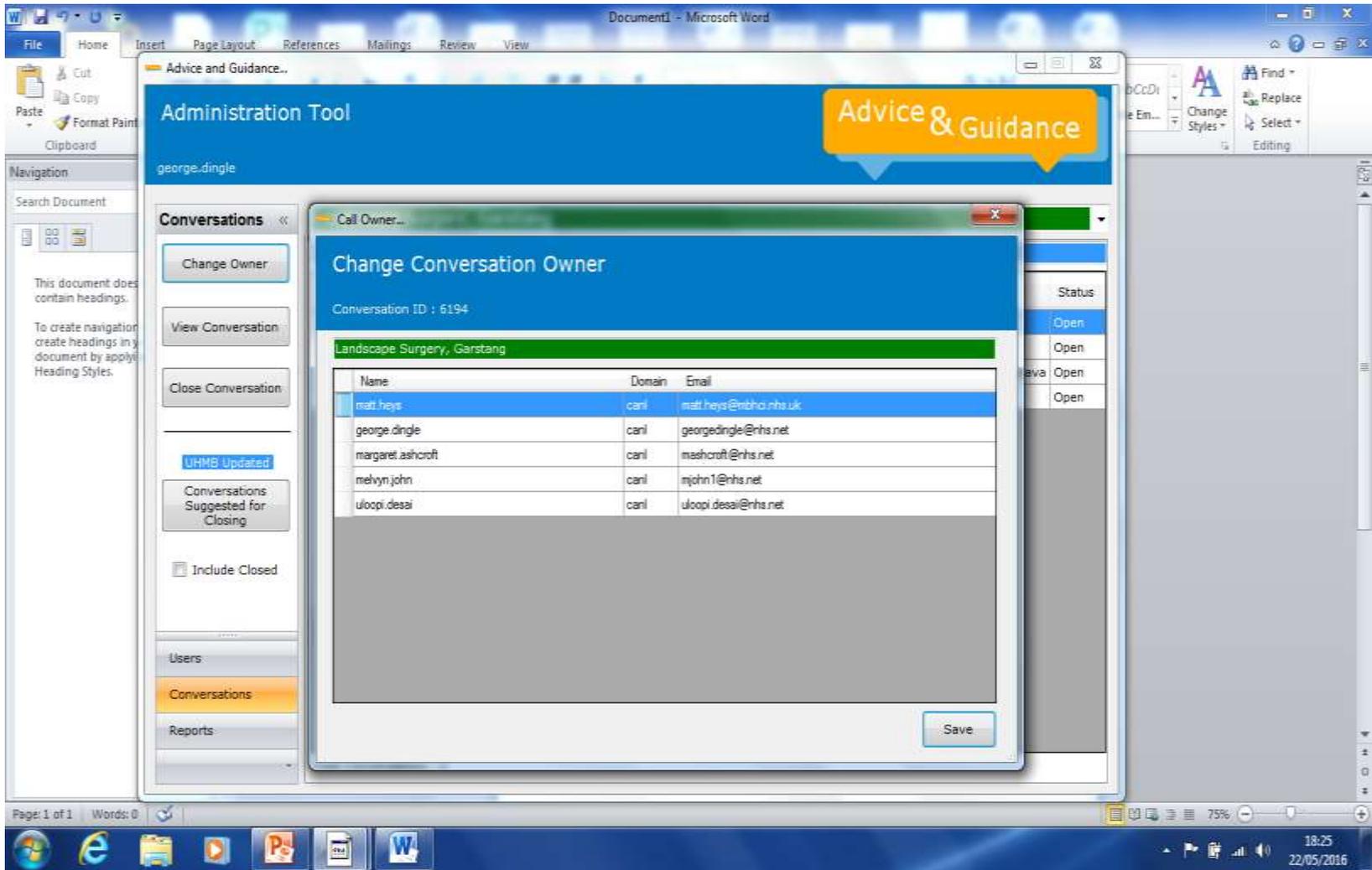
Current Selections

Year 2017/18



## What has happened since the original pilot?

- **23 specialties**
- **Automated breach / reminder alerts**
- **Expansion across nurses**
- **Proposed expansion across STP footprint**
- **Admin tool**





## Advice & Guidance

### What were the key elements towards success?

- **Strong clinical leadership from the frontline, selling the vision**
- **Realistic, manageable cost**
- **Simplicity / Ease of use – connectivity with host EPR's, notifications**
- **Data Capture**
- **An eye on scalability / spread**
- **No mandate for use**



**Morecambe Bay**  
Clinical Commissioning Group



Healthier  
**Lancashire &  
South Cumbria**

University Hospitals  
of Morecambe Bay  
NHS Foundation Trust



**Advice & Guidance**

**What next?.....**