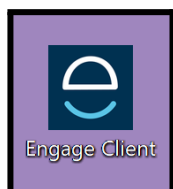
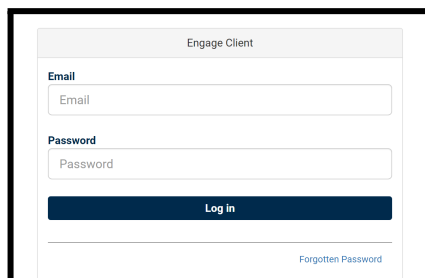


## Basic guide on how to use Engage Consult

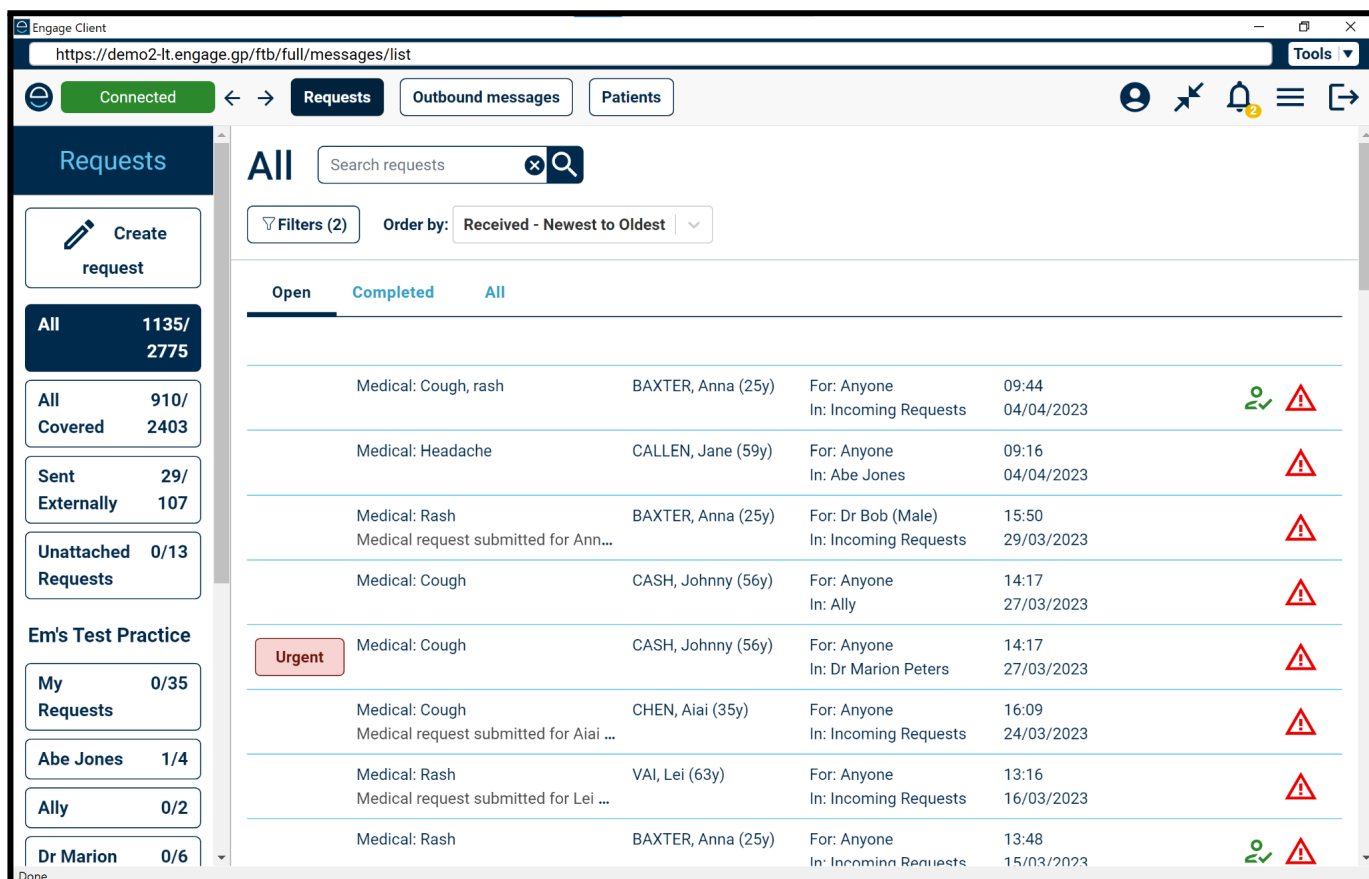
This document assumes you have downloaded and integrated the Engage Client and that you have been added as a staff member for Engage Consult.

### Step One: Open the Engage Client and your clinical system

Click on the icon to open up the Engage Client and have your clinical system open and ensure you are logged in.

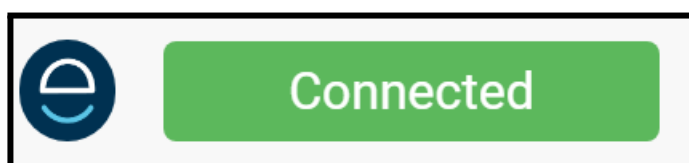
Engage Client login form with fields for Email and Password, a Log in button, and a link for Forgotten Password.



The screenshot shows the Engage Client dashboard. The top navigation bar includes 'Requests', 'Outbound messages', and 'Patients'. The left sidebar shows a 'Requests' section with a 'Create request' button and a list of request counts: All (1135/2775), All Covered (910/2403), Sent Externally (29/107), Unattached Requests (0/13), Em's Test Practice (My Requests 0/35, Abe Jones 1/4, Ally 0/2, Dr Marion 0/6). The main content area displays a table of requests with columns for Open, Completed, and All. The table lists various medical requests with details such as patient name, age, medical condition, and status.

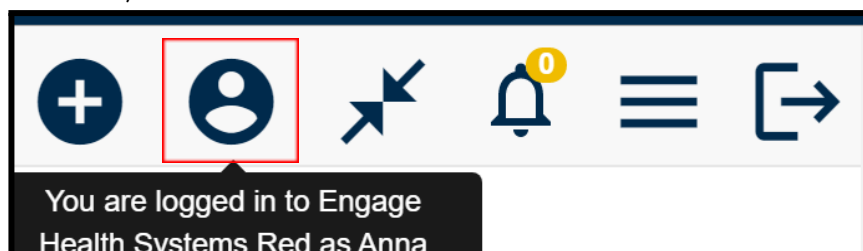
Open	Completed	All
Medical: Cough, rash	BAXTER, Anna (25y)	For: Anyone In: Incoming Requests
Medical: Headache	CALLEN, Jane (59y)	For: Anyone In: Abe Jones
Medical: Rash Medical request submitted for Ann...	BAXTER, Anna (25y)	For: Dr Bob (Male) In: Incoming Requests
Medical: Cough	CASH, Johnny (56y)	For: Anyone In: Ally
<b>Urgent</b> Medical: Cough	CASH, Johnny (56y)	For: Anyone In: Dr Marion Peters
Medical: Cough Medical request submitted for Aiai ...	CHEN, Aiai (35y)	For: Anyone In: Incoming Requests
Medical: Rash Medical request submitted for Lei ...	VAI, Lei (63y)	For: Anyone In: Incoming Requests
Medical: Rash	BAXTER, Anna (25y)	For: Anyone In: Incoming Requests

Ensure you are connected to the clinical system in the left hand corner if not follow the steps [here](#) and select your clinical system.

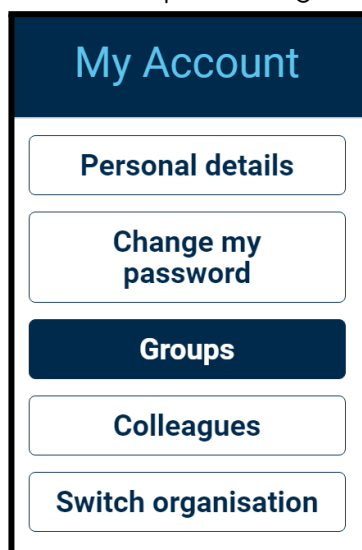


## Step Two: Cover any relevant groups and colleagues needed

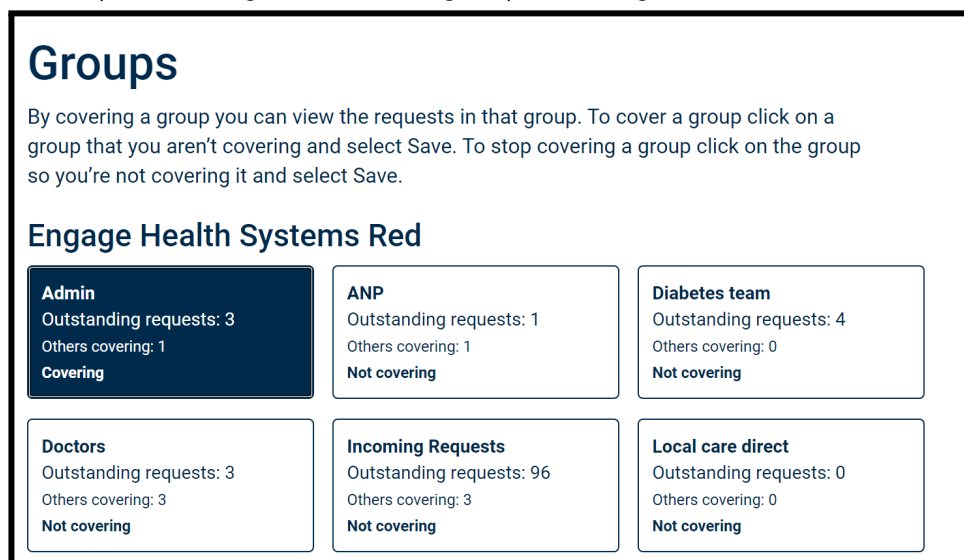
Click on your account



Select Groups/Colleagues



From here you can cover any relevant groups you need to and any colleagues this will allow you to see requests assigned to these groups/colleagues.



When you select the group/colleague to cover it will turn blue and say 'Covering'. Ensure to click save at the bottom to save your choices.

You can now see below 'Admin' has been added to the request list to give you visibility of requests assigned to that group.

## Request Views

All16/140

All Covered0/7

Engage Health Systems Red

My Requests0/4

Admin0/3



All requests - Is every single request associated with your practice.

All covered - is any groups/colleagues you are covering requests



My requests- Is requests just assigned to yourself

### Step Three: Sorting, filtering and searching for requests

When requests come in from patients it will tell you the request type, the problem reported and the patients details.

Medical: Cough, rash	BAXTER, Anna (25y)	For: Anyone In: Incoming Requests	09:44 04/04/2023	 
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You can [search requests](#) by typing in the box below.

You can [filter requests](#) by...

- Conditions
- Waiting for patient - If you have selected you are waiting for the patient to get back to you
- Groups & Colleagues
- Alert shown - If an alert was shown to the patient or not
- Request type - Medical, Admin, Health data or outbound

Edit active filters

☐ Conditions
☐ Groups & Colleagues
☐ Alert shown

☐ Waiting for patient
☐ Request Type

Close

You can also order the requests by the following..

Order by:

Priority

then by:

Received - Newest to Oldest

Received - Newest to Oldest
Received - Oldest to Newest
Updated - Newest to Oldest
Updated - Oldest to Newest
Unread First
Priority

Apply

## Step Four: Matching patients in the clinical system and verifying patients

When a request gets sent through to the Engage Client you need to match them in the clinical system and make sure they are who they say they are.  
So when you click to view a request it will prompt you to link the patient with your clinical system.

# Link with patient in SystmOne

Is this the correct patient?

BROUGH, Amelia, Oct 20, 1984

**BROUGH, Amelia**

**38yrs (20-Oct-1984)**

NHS #: 9651614862


1 Tithe Barn Road, Stockton-On-Tees, Cleveland, TS19 8SY

**Yes, this looks like the right patient**

**I don't see the correct patient, let me try a different search**

You can then select if that is the correct patient or if you need to search again.

Then select 'Identity Matched'.



Identity matched

And choose from the options how you have confirmed the individual's identity and then select 'Confirm Identity'. Please note for Account holders you will only need to do this process for the first request they send through however for Guest users you will need to verify them everytime.

## Vouch for this patient

Claimed ID: BROUGH, Amelia - 20/10/1984

Linked to patient ID 9651614862

[Open patient record in clinical system](#)

This user is an **unverified** Engage Consult account holder. Before you vouch for this patient's identity please take steps to ensure that there is a legitimate relationship between the account holder and the patient, as any subsequent contact with them will automatically appear as 'Vouched'. If you are at all unsure, just select cancel.

By vouching for this patient, you are confirming that this on-line identity is being used by the individual concerned. How have you achieved this?

- ☒ I telephoned them to confirm their identity
- ☐ Checked against information held on PCS SystemOne
- ☐ I know them personally
- ☐ I completed a documentation check
- ☐ Additional comments in the request consistent with my knowledge of patient
- ☐ Other

[Confirm Identity](#)

[Remove Link](#)

[Cancel](#)

## Step Five: Dealing with requests

You will see the request type whether that's Admin or Medical and if they have filled out a medical questionnaire you will see a report at the bottom of the request with what they have reported. You can also click the tabs to look at a certain aspect of that request such as 'Notes'.

Assigning requests to groups/colleagues see details [here](#).

You can send messages to the patient see details [here](#).


You can start video consultations with the patient see details [here](#).

How to prioritise requests [here](#).

## Medical request for BROUGH, Amelia

Born: 20-Oct-1984 Sex: Female Gender: Female Tel: NHS Number: 9651614862

Request sent by BAXTER, Anna Would like help from: Anyone

 Patient link has been successfully verified

Identity verified

Routine | v

Contact patient | v

Action | v

☐ Waiting for patient

Full Request

Request Details

Notes

Messages

Attachments


Readings

>

Alert shown

Attached to clinical record

 2-way messaging enabled

 Message from Anna Baxter - read

Anna Baxter - Em's Test Practice at 13:08 on 21st Feb, 2023

Medical request submitted for Amelia Brough. Problems reported: rash

 BROUGH, Amelia

Born 20-Oct-1984 Sex Female Gender Female

### Photos/Attachments

User consented to the sending and storing of this photograph(s) / document(s) for the purpose of their care.

 Sunburn.jpg 

### ICE/Custom Questions

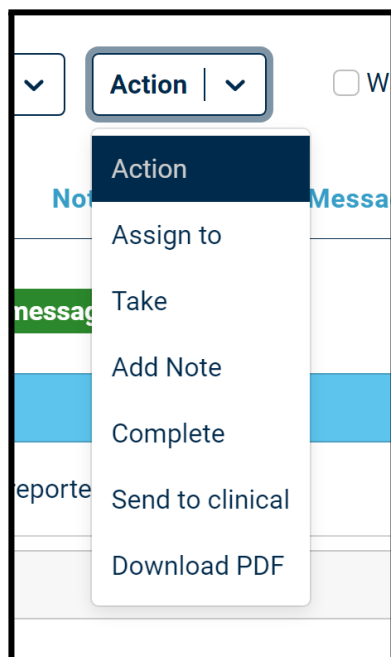
How long have these symptoms or concerns been going on? Have they got better or worse?

For a week now and getting worse

### Step Six: Completing and uploading requests to the clinical system

Once you have dealt with the request and it's ready to complete you can send it to the clinical system and complete the request.

Go to Action and select Send to Clinical.



You can select and deselect what you want sent to the clinical system

## Send to Clinical

Only checked items will appear in the clinical record

Information that will also be added to the clinical record:

Fields preceded by an asterisk (\*) are required

### Heading\*

Engage Consult: Medical Request

### Title

Problems Reported: rash

### Detail

Complete

Send to clinical

Send to clinical and complete

Then select Send to Clinical and Complete which will upload the online consultation to the clinical system and mark the request as completed.

**Send to Clinical and Complete**

See below support articles on more Advanced features you can utilise on Engage Consult:

[Outbound patient messaging](#)

[Bulk Messaging by SMS](#)

[Intelligent Request Routing](#)