Locala Community Partnerships CIC

NHS

8 September 2020

Dear Practice

RE: Long Term Condition Annual Review Referral Process for Housebound Patients

Long Term Condition (LTC) Annual Reviews are conducted by the Medicines Support Team within Locala. Referrals for these reviews were suspended at the start of the COVID pandemic, in line with national guidance for both community services and general practice. As service recovery commences, the review of the referral process that was initiated pre-COVID has been finalised to enable us to accept referrals from Monday 14th September 2020.

Enclosed are details of the new process and a step by step guide on how to make referrals through SystmOne and EMIS. This will make it much easier to directly refer through SystmOne and will ensure the LTC annual review requirements are captured accurately, whether they are for a blood test to support a LTC review by the practice, or a full review by an appropriate clinician within Locala. The referral process will be more efficient and has been designed to minimise rejected referrals.

Patients should be referred when they are 2 months away from requiring their annual LTC review and prioritised in line with the national QOF guidance.

https://www.england.nhs.uk/coronavirus/wp-content/uploads/sites/52/2020/03/C0713-202021-General-Medical-Services-GMS-contract-Quality-and-Outcomes-Framework-QOF-Guidance.pdf

Patients with multiple LTCs should be referred for all their annual reviews at the same time.

New LTC templates are currently being developed, ensuring they adhere to NICE guidance and provide the relevant codes to support QOF. This will allow us to capture all the necessary data and will be of benefit to all of us.

Many thanks for your support with this. If you have any queries on the attached process, suggestions for improvement or are having trouble referring, please do not hesitate to get in touch.

Yours sincerely

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Process for the Annual Review of Housebound Patients with Long Term Conditions in Kirklees

1.0 Introduction

In January 2018, the Medicines Support Team began to undertake annual long term condition (LTC) reviews on behalf of GP practices for level 2 & 3 housebound patients. All patients on a LTC register must have an LTC review undertaken annually within the QOF year (April to March). Locala Medicines Support Team undertake annual reviews for the following long-term conditions in line with Appendix A:

- Asthma
- CHD
- COPD
- Diabetes including foot checks
- Heart failure
- Hypertension

Moving forward, specialist services and community matrons will undertake annual LTC reviews for those patients (Level 4) who are already on their caseload.

Long term conditions (LTCs) are defined on the Department of Health website as "those conditions that cannot, at present, be cured, but can be controlled by medication and other therapies."

Housebound patients are those patients for which routine clinical appointments in the home setting only is appropriate. It is acknowledged that an individual's needs may change impacting upon their eligibility for a home visits and therefore this needs to be reassessed on a regular basis by GP practice (see appendix B for full criteria).

2.0 Purpose

The purpose of this guidance is to ensure that housebound patients with specific long-term conditions receive an annual review in a consistent, defined manner.

3.0 Scope

This guidance applies to GP Practices, SPOC, ICCT co-ordinators, Locala phlebotomists and the Medicines Support Team for the annual review of patients with long term conditions who are housebound.

4.0 Roles and Responsibilities

4.1 Practice

- Refer housebound patients for their annual review **TWO** months before their due date via e-referral (for practices who use SystmOne see appendix C and for practices who use EMIS see appendix D).
- Complete relevant blood and urinalysis requests on ICE (see appendix E).
- Ensure the patient has been identified as housebound at the time of referral and that the patients are clearly read-coded as house bound.
- Ensure LTC registers are up to date.

- Undertake relevant tests, investigations, prescribing and referral at diagnosis then refer for annual long-term condition review after 1 year.
- Synchronise the dates of LTC annual reviews so that patients with multiple LTCs are referred for all reviews at the same time.
- Review tasks sent following an annual review and take appropriate action including the alteration of treatment and any necessary prescribing as appropriate.
- Participate in MDT discussions for level 4 complex patients as appropriate.
- Provide a direct/bypass number to Locala to flag urgent patient issues which require immediate response.

4.2 SPOC

- Process referrals for LTC annual reviews.

4.3 Phlebotomy

- Undertake relevant blood and diagnostic tests as requested by the GP surgery.
- Communicate with the Medicines Support Team, specialist service or Community Matron once bloods/diagnostics have been completed for patients requiring full annual LTC review.

4.4 Locala Medicines Support Team

- Undertake relevant long term condition reviews for level 2 and 3 patients that have been referred within the financial year within 2 months of the due date.
- Notify the GP practice that an annual review has been completed.
- Complete 98% of annual LTC reviews for patients who have been referred at least 2 months before their due date.
- Flag all patients with any symptoms of concern immediately via telephone to the relevant practitioner.
- Communicate other identified issues to the relevant practitioner within 24 hours via task.
- Participate in MDT discussions with the practice where appropriate.

4.5 Specialist Teams and Matrons

- Undertake relevant Long Term condition reviews for patients on their caseload who have been referred within 2 months of the due date.
- Notify the GP practice that an annual review has been completed.
- Complete 98% of annual LTC Reviews for patients who have been referred at least 2 months before their due date.
- Flag all patients with any symptoms of concern immediately via telephone to

the relevant practitioner.

- Communicate other issues to the relevant practitioner within 24 hours via task.
- Participate in MDT discussions with the practice where appropriate.

5.0 Exclusions

Patients will be excluded if:

- Consent is declined
- They are referred for diagnostic tests for purposes other than as part of Long-Term Condition Annual review. These may be conducted by the Integrated Community Care Team (ICCTs) if referred via the community nursing/ ICCT referral form.
- They are not house-bound
- The patient is referred for an annual review not included on the list

The referral will be assessed. Incomplete or missing information or inappropriate referrals will be rejected back to the referrer. If the practice does not receive a rejection, the referral has been accepted and review will be carried out in due course; there is no need to re-refer.

6.0 Requesting Diagnostic Tests for the practice to undertake their own LTC reviews

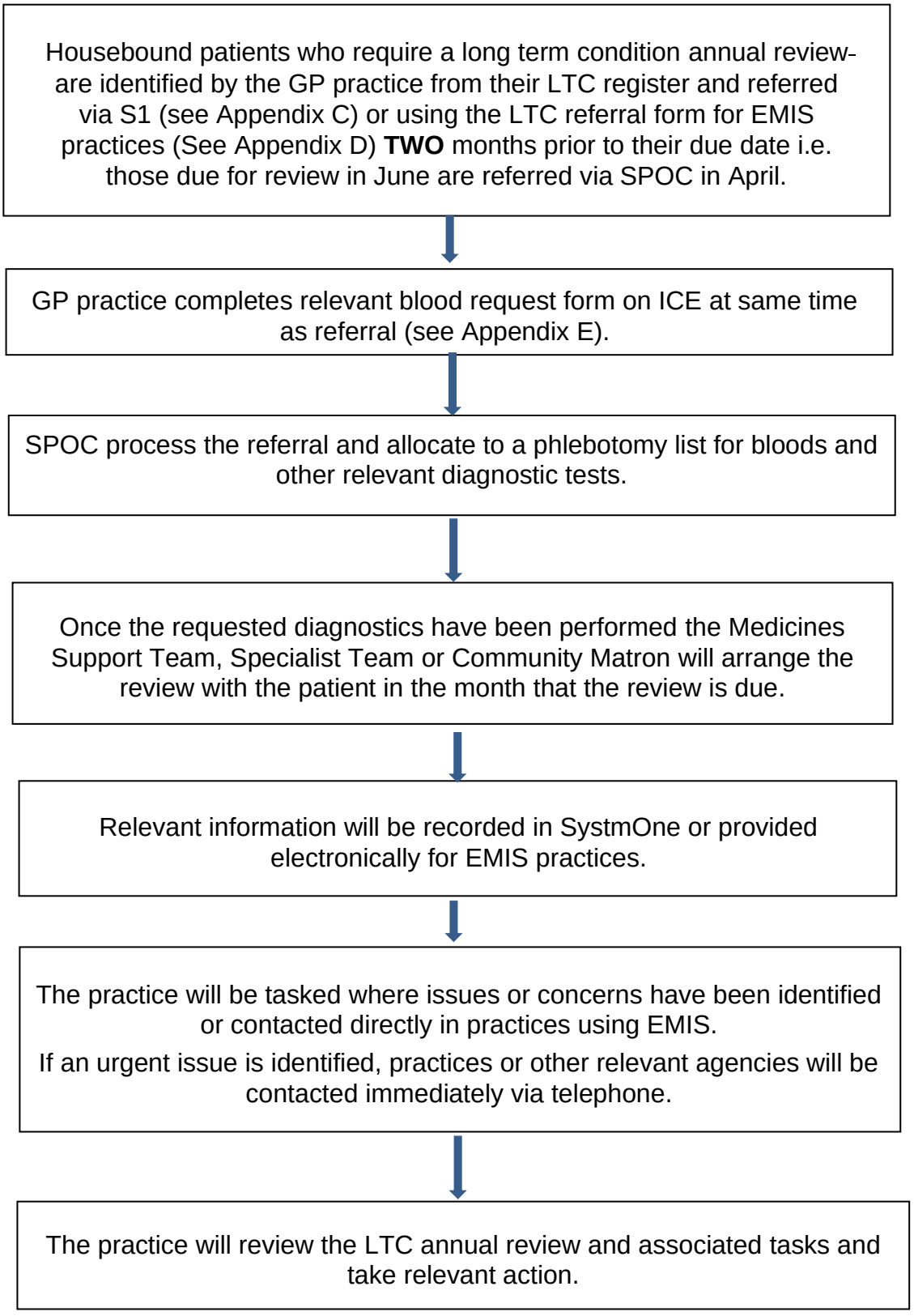
Appropriate physical and pathology investigations can be requested for housebound patients if an annual review is being undertaken by the practice team using the same referral process. Relevant information will be recorded in SystmOne or provided electronically for EMIS practices.

7.0 Contact

Any queries relating to Level 2 & 3 Annual Long Term Condition Review requests should be discussed directly with the Medicines Support Team. They can be contacted via medicines@locala.org.uk or by ringing 03030034541.

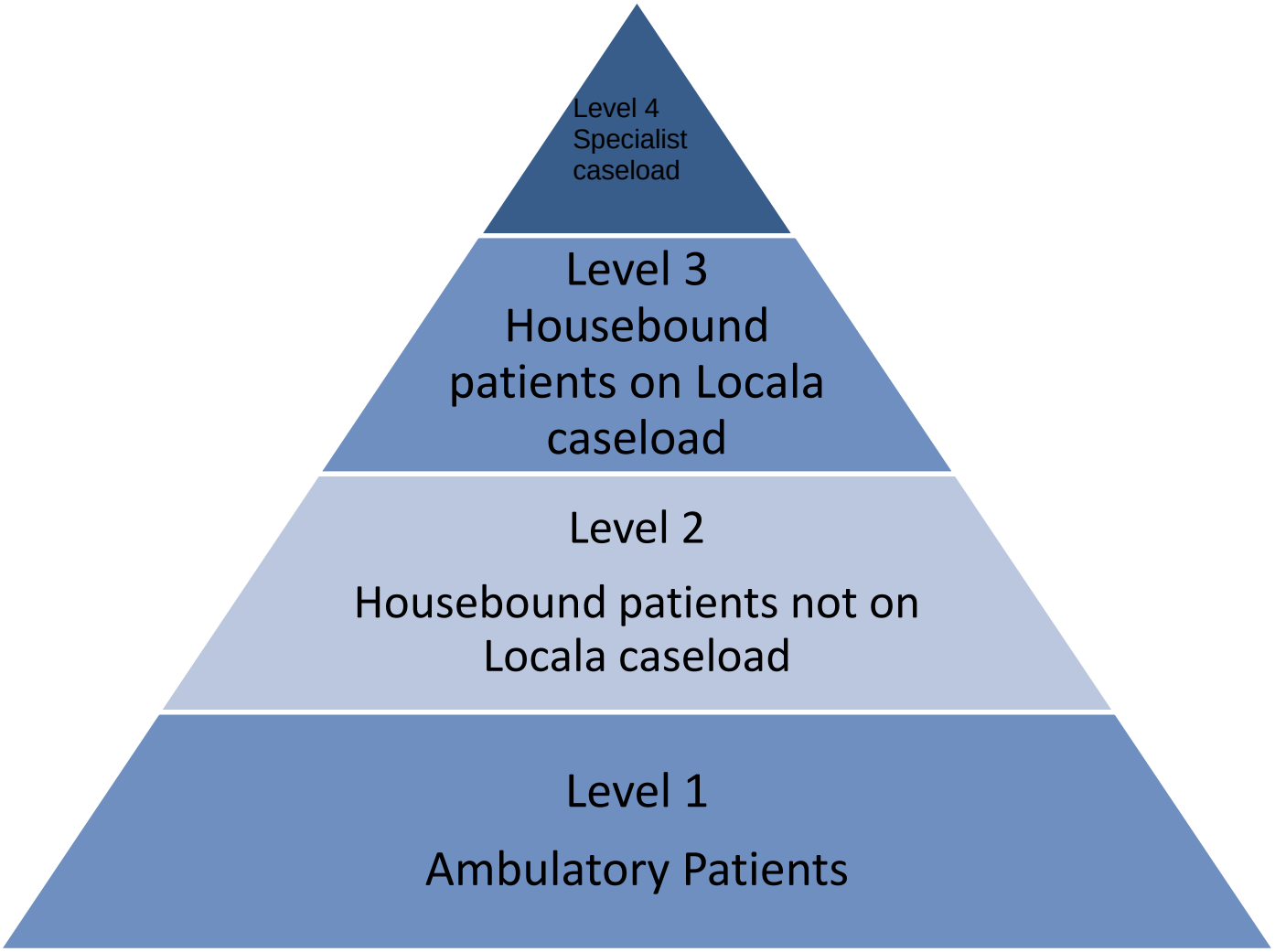
8.0 Process

Long Term Condition Annual Review for Housebound Patients

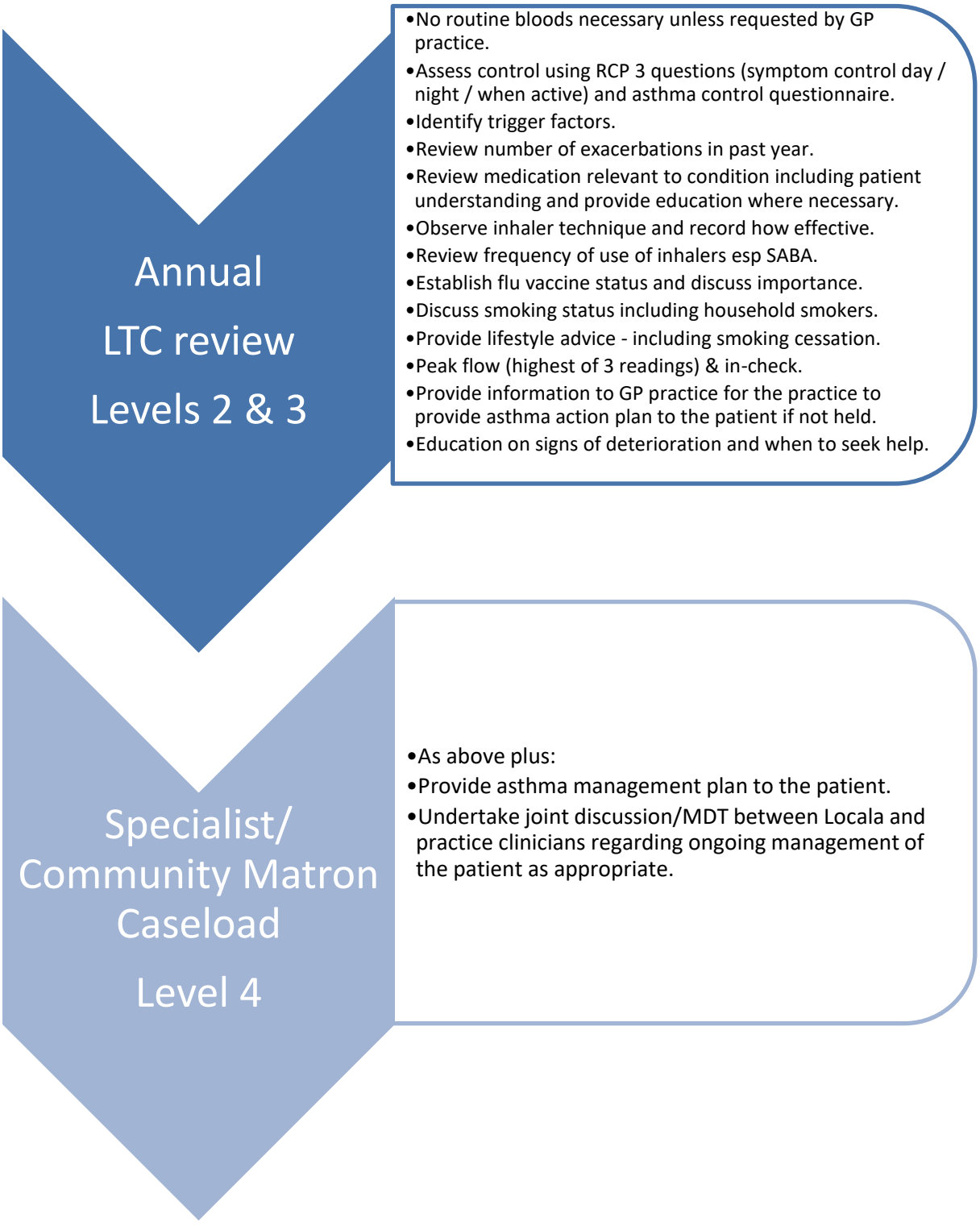


APPENDIX A

Long Term Condition Annual Review Criteria for Housebound Patients



Asthma


Annual
LTC review
Levels 2 & 3
•No routine bloods necessary unless requested by GP practice.
•Assess control using RCP 3 questions (symptom control day / night / when active) and asthma control questionnaire.
•Identify trigger factors.
•Review number of exacerbations in past year.
•Review medication relevant to condition including patient understanding and provide education where necessary.
•Observe inhaler technique and record how effective.
•Review frequency of use of inhalers esp SABA.
•Establish flu vaccine status and discuss importance.
•Discuss smoking status including household smokers.
•Provide lifestyle advice - including smoking cessation.
•Peak flow (highest of 3 readings) & in-check.
•Provide information to GP practice for the practice to provide asthma action plan to the patient if not held.
•Education on signs of deterioration and when to seek help.
Specialist/ Community Matron Caseload
Level 4
•As above plus:
•Provide asthma management plan to the patient.
•Undertake joint discussion/MDT between Locala and practice clinicians regarding ongoing management of the patient as appropriate.

Coronary Heart Disease

Annual LTC review Levels 2 & 3

- Review blood/urine tests as requested by the practice (U+E's,eGFR, lipid profile,HbA1c, urine ACR)
- Undertake general observations - pulse, sitting and standing BP.
- Identify any chest pain (at rest/ activity).
- Establish use of GTN spray.
- Identify symptoms including dizziness, paroxysmal nocturnal dyspnoea, general dyspnoea (exertion and rest), oedema, orthopnea.
- Provide lifestyle advice - including smoking status and cessation advice, exercise status and advice, alcohol intake.
- Establish weight, BMI and dietary advice.
- Review medication relevant to condition including patient understanding and provide education where necessary.
- Establishe flu vaccine status and discuss importance.
- Provide education on signs of deterioration and when to seek help.

Specialist/ Community Matron Caseload Level 4

- As above plus:
- Acknowledge coronary heart disease management plan if held.
- Undertake joint discussion/MDT between Locala and practice clinicians regarding ongoing management of the patient.

COPD

Annual LTC review Levels 2 & 3

- MRC breathlessness scale.
- Establish number of exacerbations in last year.
- Review oxygen saturation levels.
- Review inhaler use and technique.
- Provide education on signs of deterioration and when to seek help.
- Document home oxygen use.
- REview nebuliser use if relevant.
- Document non-invasive ventilation.
- Establish flu vaccine status and discuss importance.
- Provide lifestyle advice - Smoking status and cessation advice.
- Establish BMI and provide dietary advice if necessary.
- Review medication relevant to condition including patient understanding and provide education where necessary.
- Check Pulmonary rehab has been offered if appropriate.
- NB FEV is no longer included in LTC review.

Specialist/ Community Matron Caseload Level 4

- As above plus:
- Support emotional / psychological needs
- Acknowledge COPD management plan if held
- Undertake joint discussion/MDT between Locala and practice clinicians regarding ongoing management of the patient

Diabetes

Annual LTC review Levels 2 & 3

- Review Blood/urine tests as requested by practice (HbA1c, U+E's incl eGR, urine ACR & lipids).
- Assess CVD risk using Qrisk2 if appropriate.
- Document BP (sitting and standing) and review BP control.
- Assess frailty if appropriate.
- Review past glucose readings if measured and HbA1c.
- Confirm retinal screen been undertaken.
- Perform foot screen if able and not under podiatry for foot checks.
- If on insulin- observe injection sites and provide advice.
- Review medication relevant to condition including patient understanding and provide education where necessary.
- Review frequency of hypos and undertake hypo management discussion.
- Establish flu vaccine status and discuss importance.
- Provide lifestyle advice - including smoking status and cessation advice, exercise status and advice, alcohol intake.
- Record BMI and provide dietary advice as appropriate.
- Provide education on signs of deterioration and when to seek help.

Specialist/ Community Matron Caseload Level 4

- As above plus:
- Support emotional / psychological needs.
- Provide DAFNE / DESMOND referral.
- Acknowledge diabetes self-management plan if held.
- Undertake joint discussion/MDT between Locala and practice clinicians regarding ongoing management of the patient.

Heart Failure

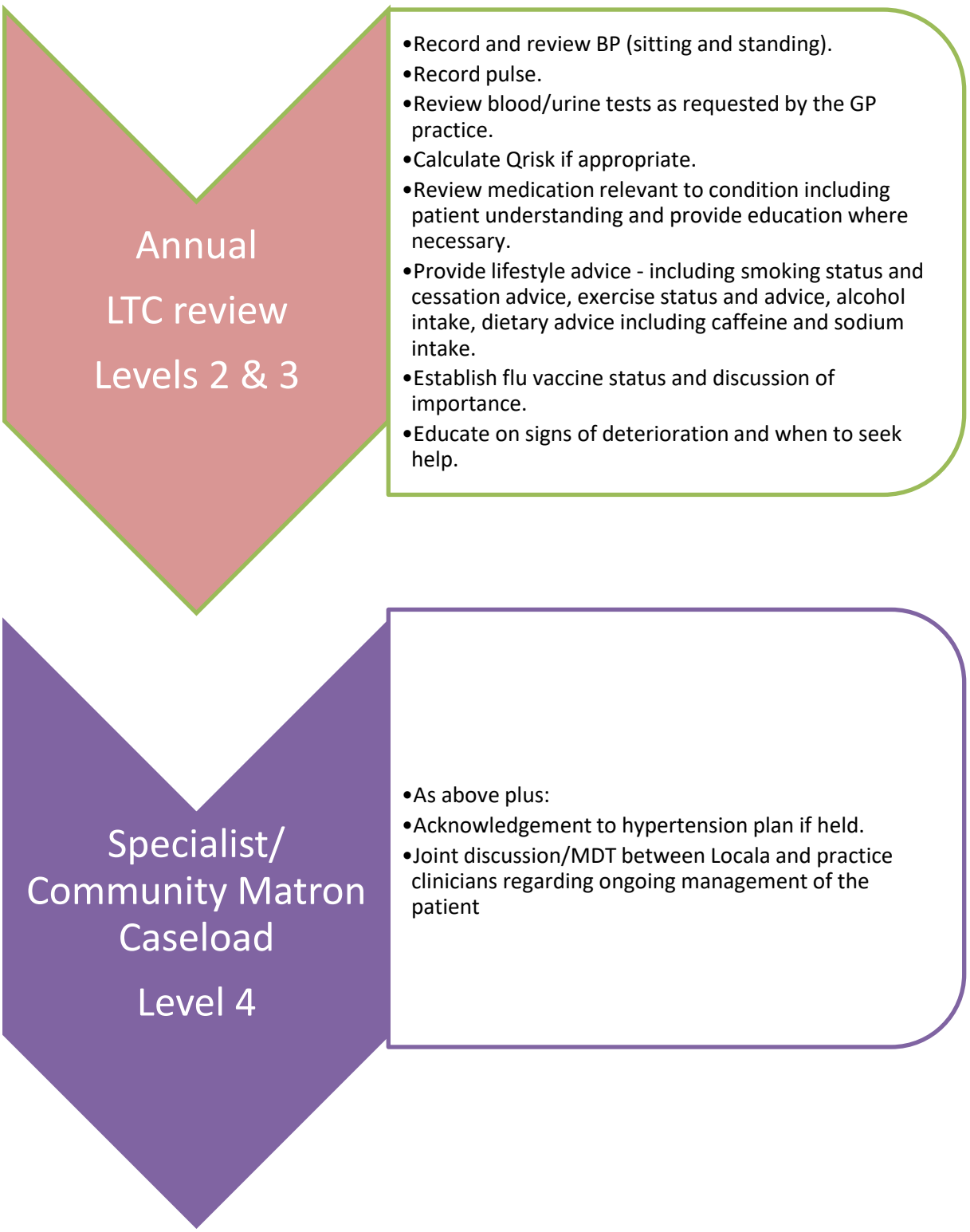
Annual LTC review Levels 2 & 3

- Review blood/urine tests as requested by practice (U&Es, eGFR, HbA1C, lipids if not on statin, urine forACR).
- Undertake general observations - BP sitting and standing, pulse (rate and rhythm).
- Check NYHA classification.
- Review whther the patient has symptoms of syncope or pre-syncope.
- Record symptoms - general dyspnoea (exertion and rest), cough, orthopnoea, paroxysmal nocturnal dyspnoea, oedema and site, fatigue, palpitations, chest pain.
- Review medication relevant to condition including patient understanding and provide education where necessary.
- Provide lifestyle advice - including smoking status and cessation advice, exercise status and advice, alcohol intake.
- Record BMI, weight and provide dietary advice.
- Establish flu vaccine status and discuss importance.
- Provide education on signs of deterioration and when to seek help.

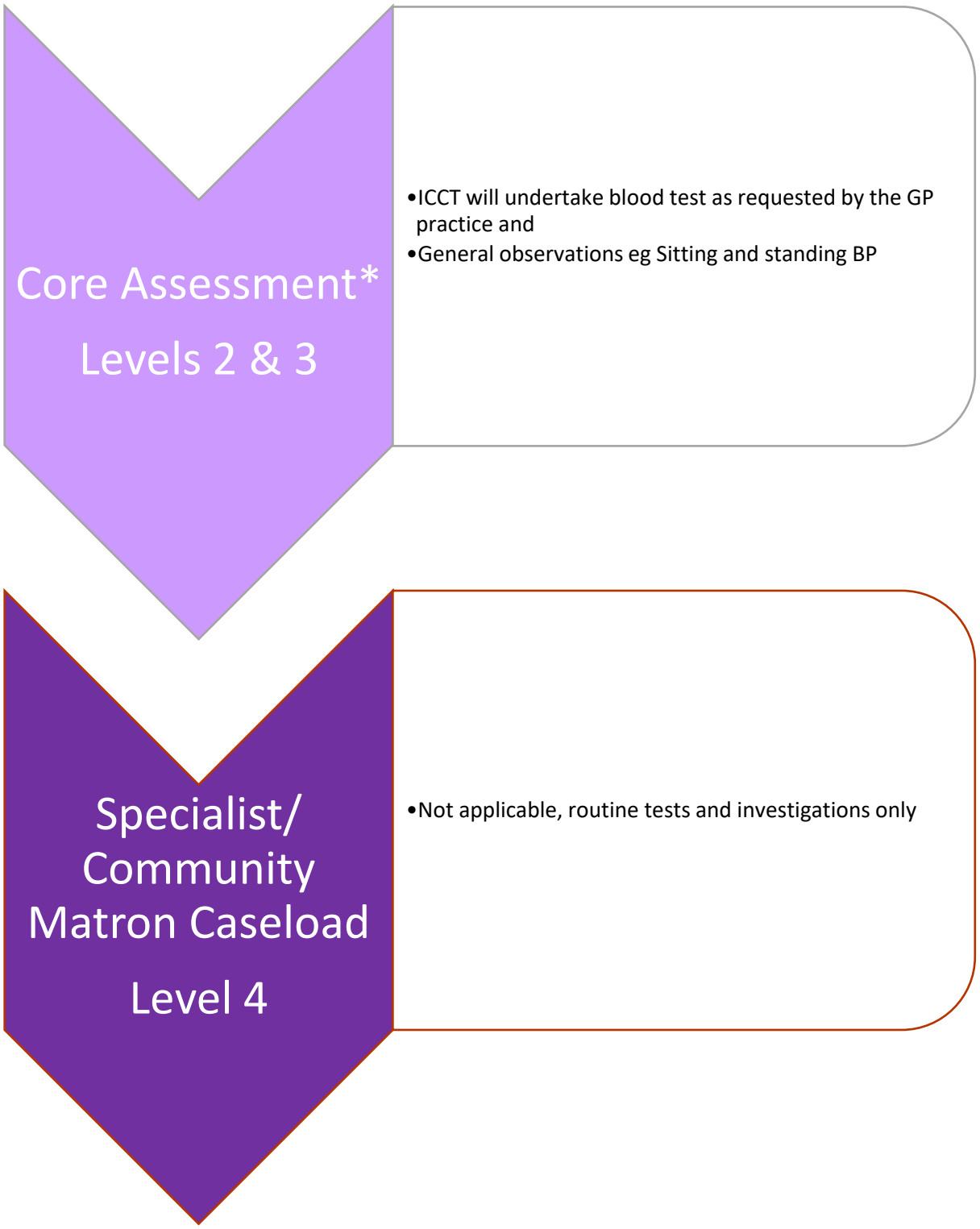
Specialist/ Community Matron Caseload Level 4

- As above plus:
- Acknowledge heart failure management plan if held.
- Provide joint discussion/MDT between Locala and practice clinicians regarding ongoing management of the patient.

Hypertension



Stroke/TIA



*Locala will only undertake the routine physical investigations and blood investigations listed that are associated with stroke/TIA e.g. bloods, blood pressure if referred via ICCTs rather than for an annual review.

Mental Health Reviews

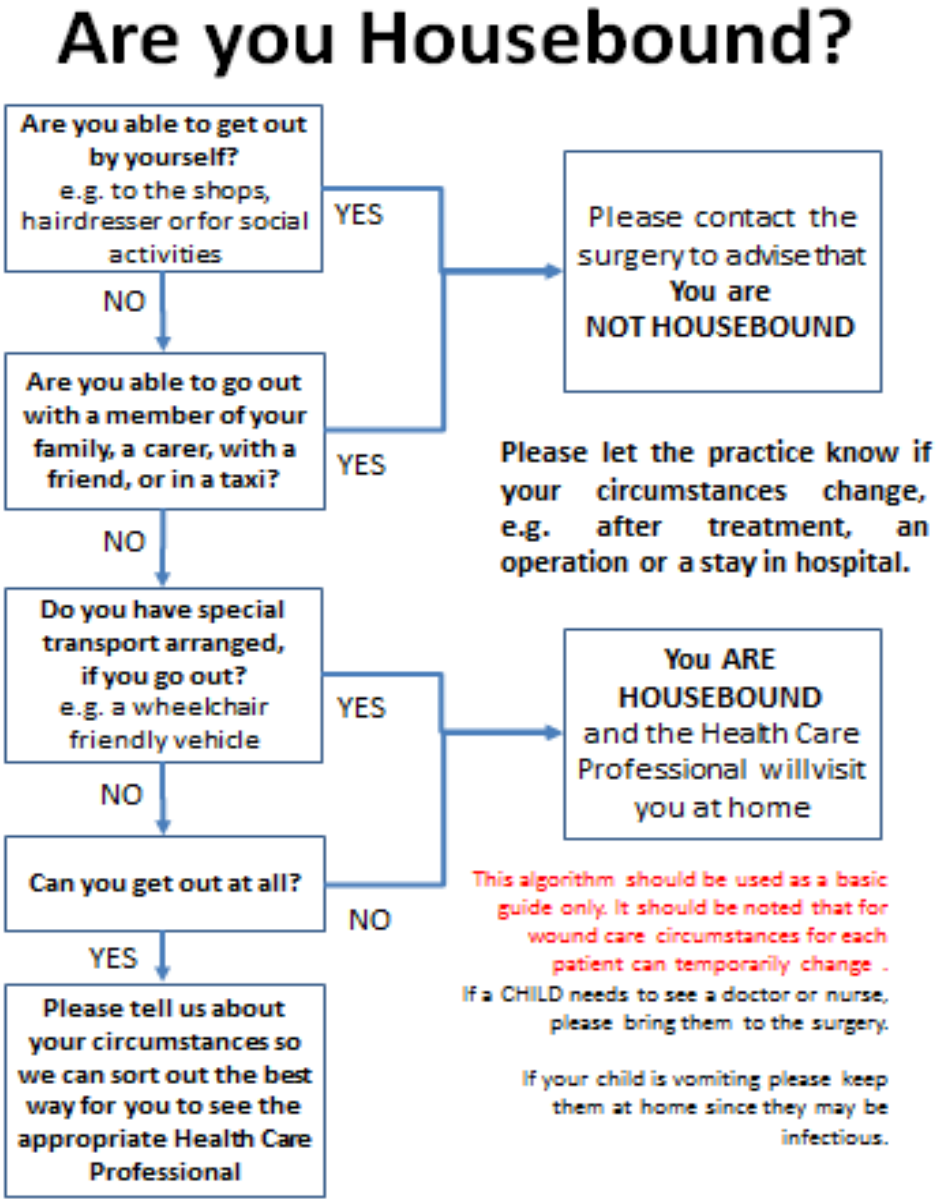
Mental health:
Mental health reviews such as depression, bipolar, psychosis – subject to discussion between the practice team and SWYPFT are not part of Care Closer to Home delivery.

Dementia:
Older People's mental health reviews, such as dementia are the responsibility of SWYPFT. Locala acknowledges that a number of these patients will also be under the care of Locala clinicians and the interventions required as part of an annual dementia review will be discussed and agreed between providers and the practice team where this falls within Care Closer to Home delivery to ensure a seamless patient contact. Dementia reviews form part of the recognised national Mental Health clusters under which SWYPFT operate and will be delivered through this review process.

Appendix B Housebound Definition:

- A patient who routinely receives a home visit by the GP / Practice Nurse / other Health Services
- A patient who has been discharged from hospital and is temporarily deemed to be temporarily housebound because of the risk of a fall / infection / other risks that may hinder healing

A person is classified as housebound if the GP **routinely** carries out a home visit to them. In the event that a person has a short term issue preventing them from attending the surgery this would be discussed with Locala and an agreement should be reached for both parties to make a provision that best meets that patient's needs on a case by case basis. Patients that are able to leave their home with minimal assistance are **not** regarded as being housebound, please refer to the housebound patient definition flowchart for further guidance.



Long Term Condition Referral Process

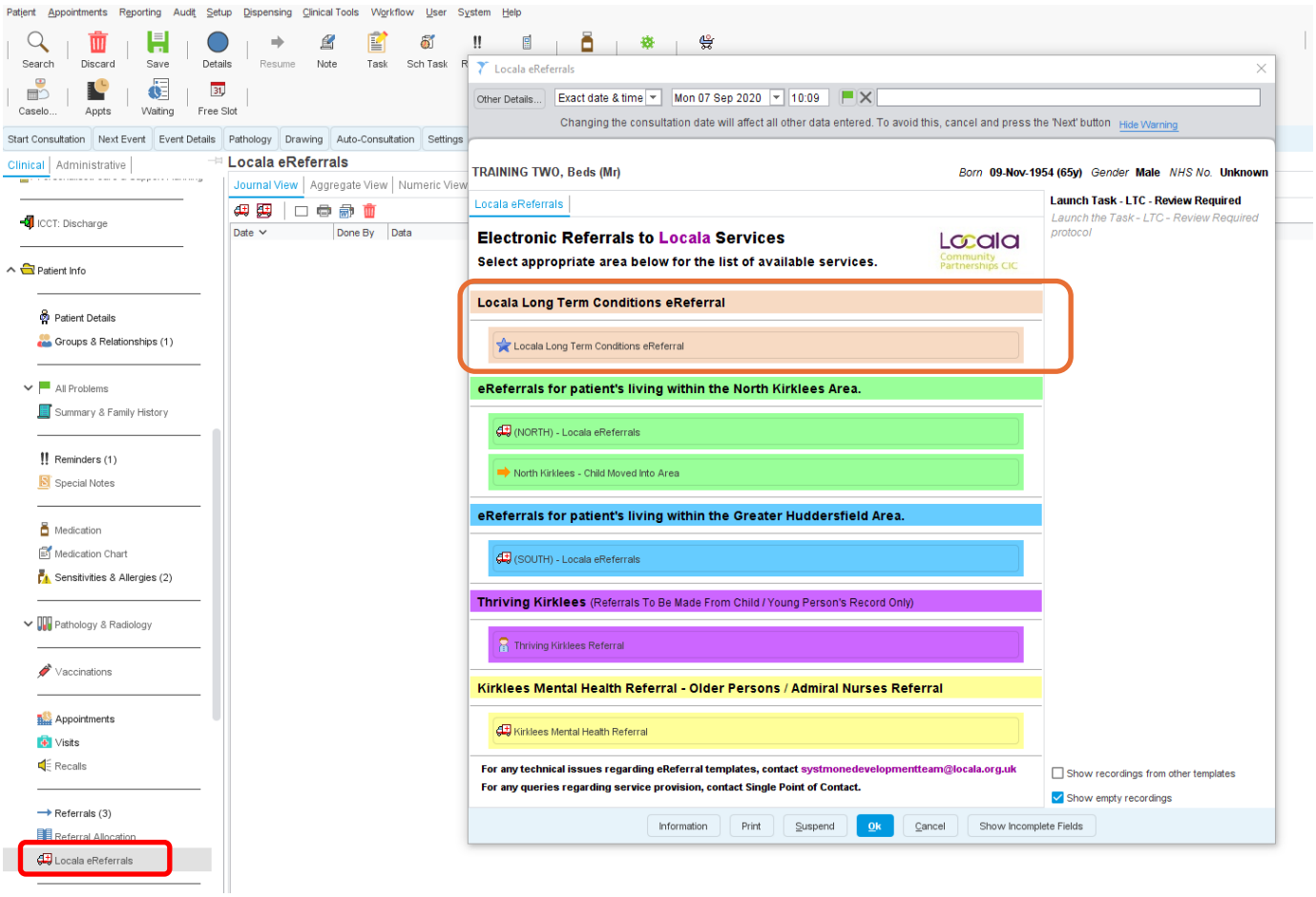
Locala CIC

SystmOne - Locala Long Term Condition Referral

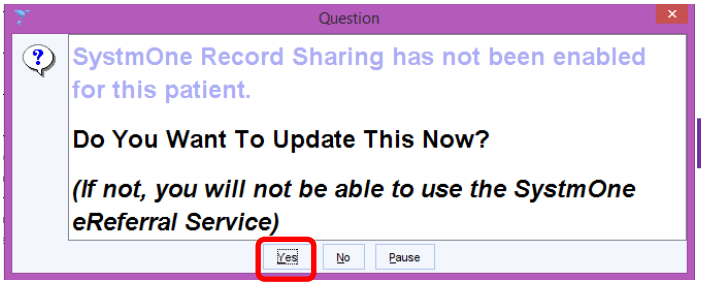
The following guidance document explains the new Long Term Conditions (LTC) Annual Review referral process for GP practices who use SystmOne. The process has been developed to be as simple as possible and straight forward to navigate.

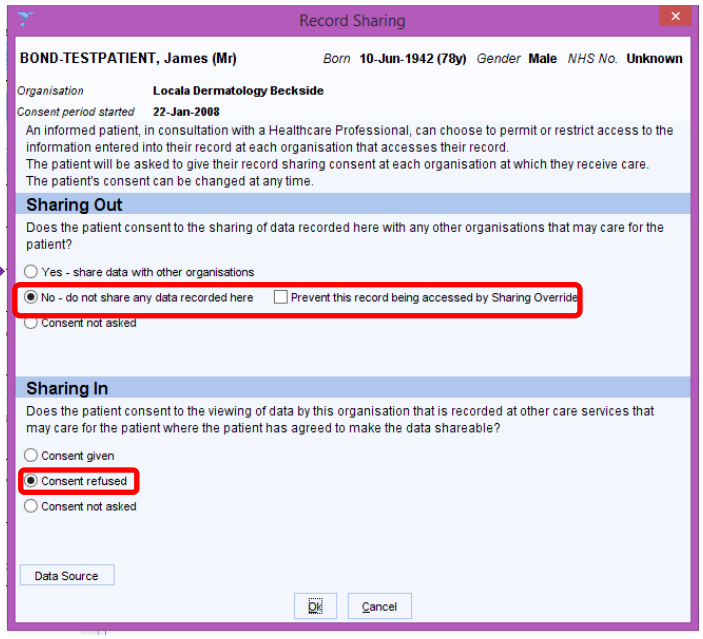
E-referral:

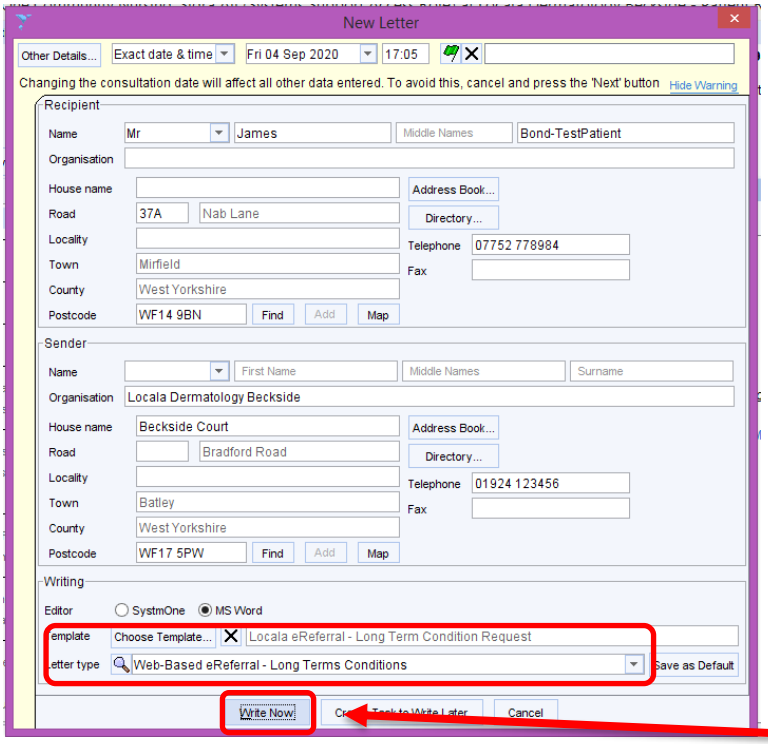
In the patient's record, select **'Locala eReferrals'** from the clinical tree, as per usual process. You will notice a new referral button specifically for Long Term Condition Annual Review Referrals, highlighted in the screen shot below. Select this to proceed.

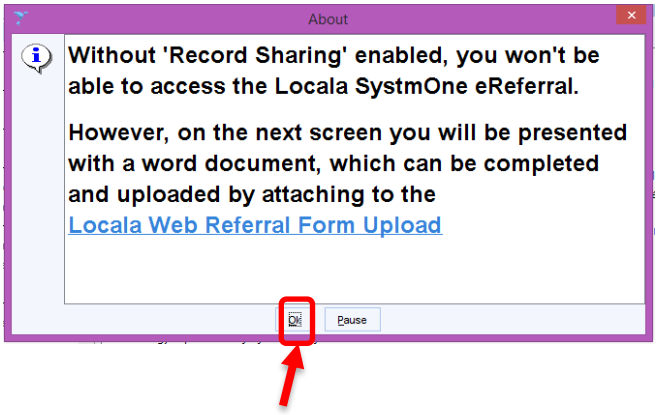


If a sharing consent has not previously been enabled for this patient, the system will prompt you to enable this (with patient consent) to allow you to proceed. However, if sharing consent has been declined, you will be prompted to refer the patient through a letter format instead, demonstrated in the screen shots below.





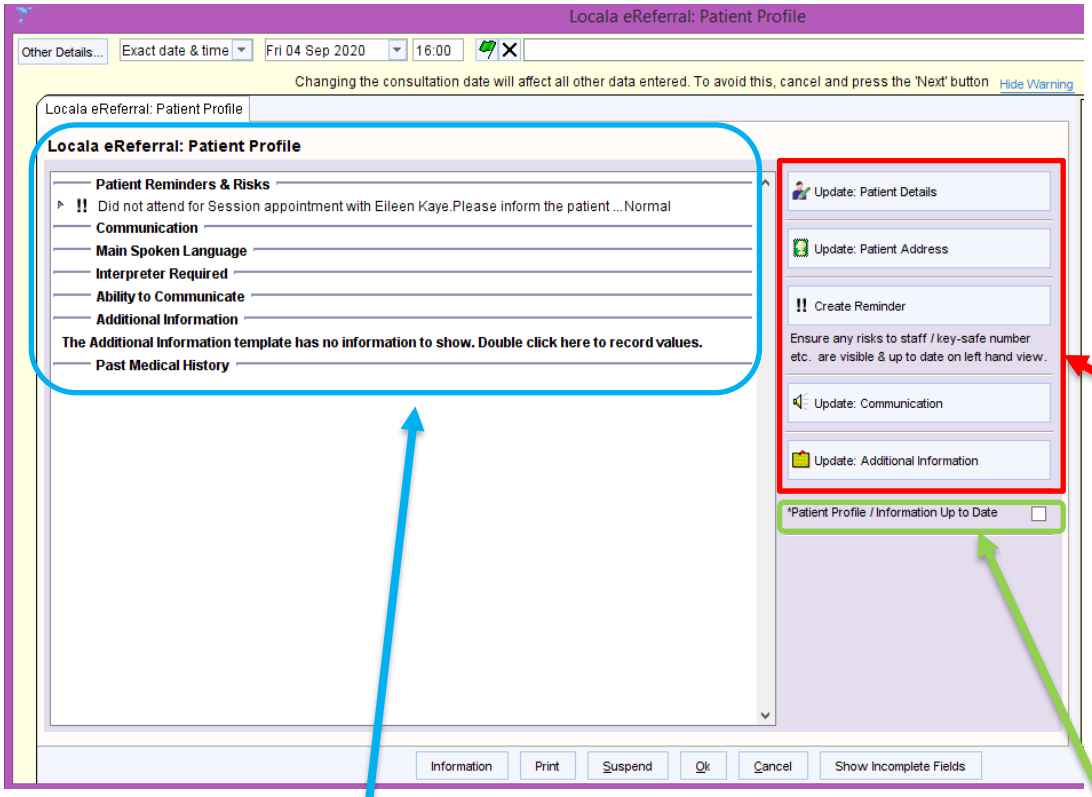




If the patient declined the sharing out consent, instructions to an alternative referral route will appear as shown above. Select write now to complete via web-referral and follow the link in the prompt to proceed.

Long Term Condition Annual Review eReferral Template:

The LTC eReferral template is separated into two sections. The first section relates to the '**Patient's Profile'** (shown in the screen shot below).



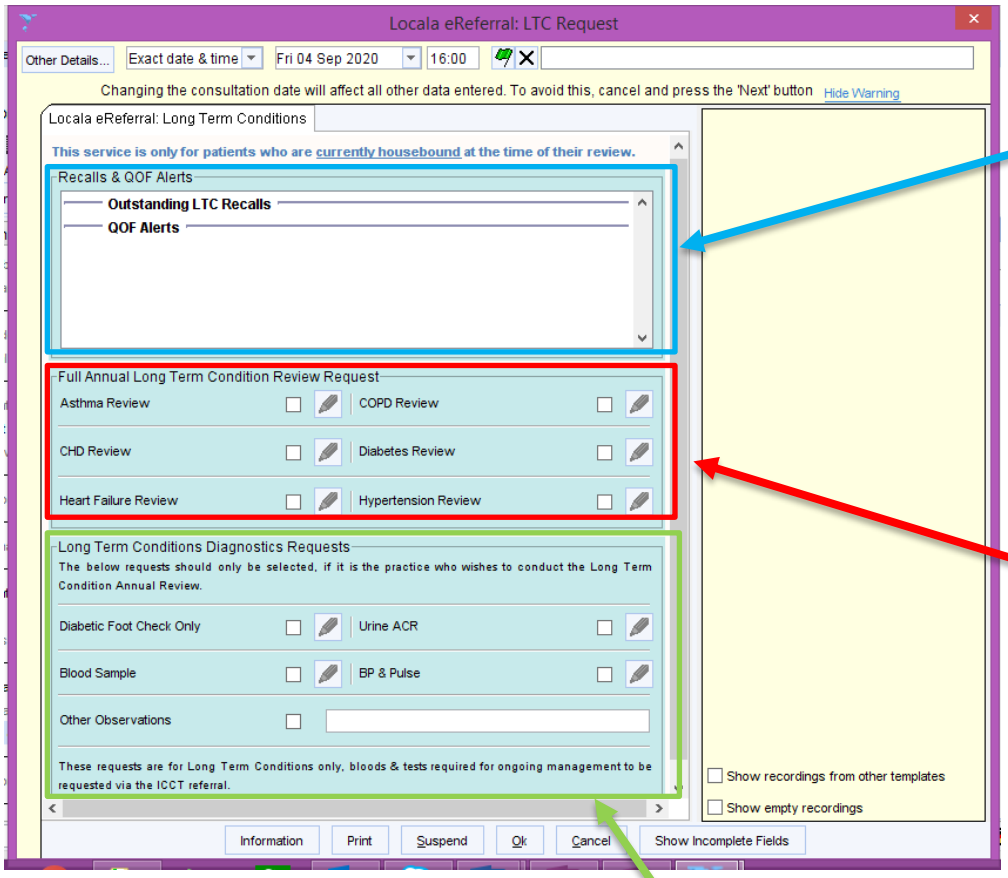
If any patient details require updating you can use the quick action buttons here to directly update the relevant information.

Here you will be able to see an overview of the patient's general details, including any reminders on their SystmOne record and their previous medical history.

If/ once the patient's details are up to date, tick this box to proceed.

Once you have confirmed the above, select the 'Ok' button to continue with the referral process.

The final section of the referral relates to the LTC request, shown in the template below.



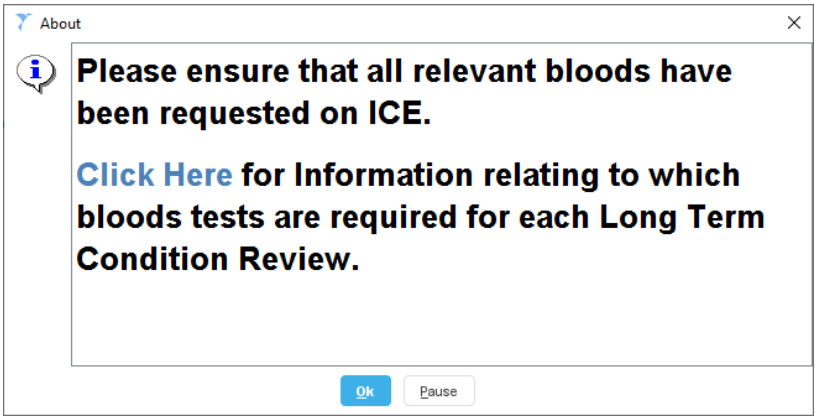
Here you will be able to see a view of any outstanding LTC Recalls and QOF alerts recorded on SystmOne.

You can select the LTC annual review you wish Locala to complete from the option list here. By using the little pencil icon you have the option to add any further notes related to your request.

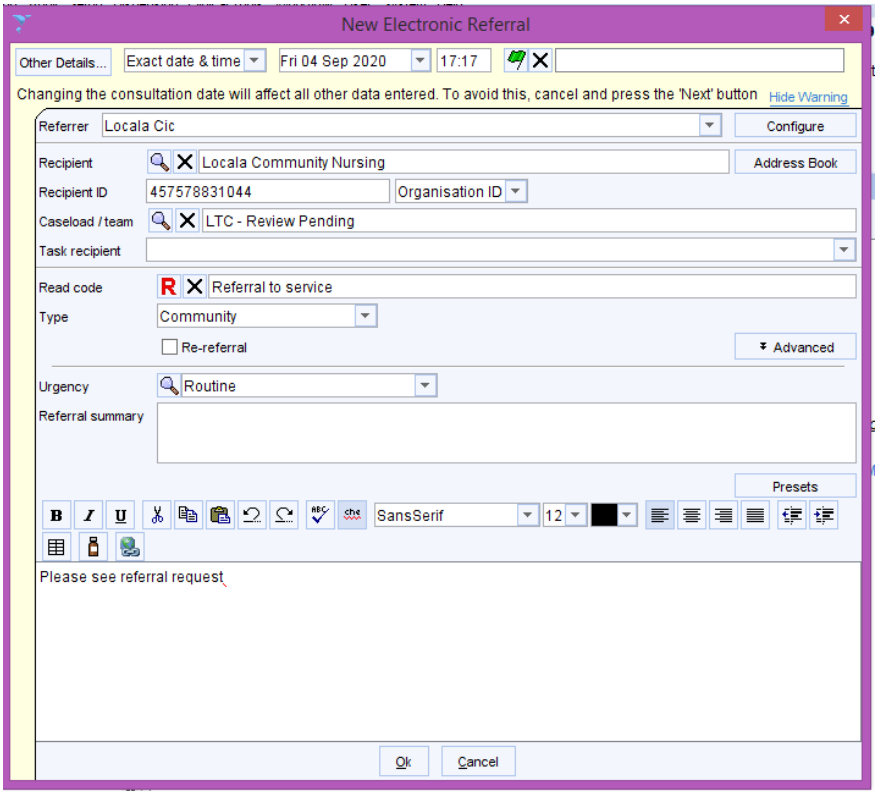
If you wish to conduct the patient's LTC review within the GP Practice and would like Locala to perform any diagnostic tests related to the LTC review – select from the options listed here or specify any alternatives in the space provided.

Once you have completed this, select 'Ok' at the bottom of the template, to proceed.

Please note – if any pathology tests are required either on their own or as part of the selected LTC Review, a prompt will appear as a reminder to add the related blood/ microbiology form to ICE. There is also a support link which provides information on the blood tests required for each review.

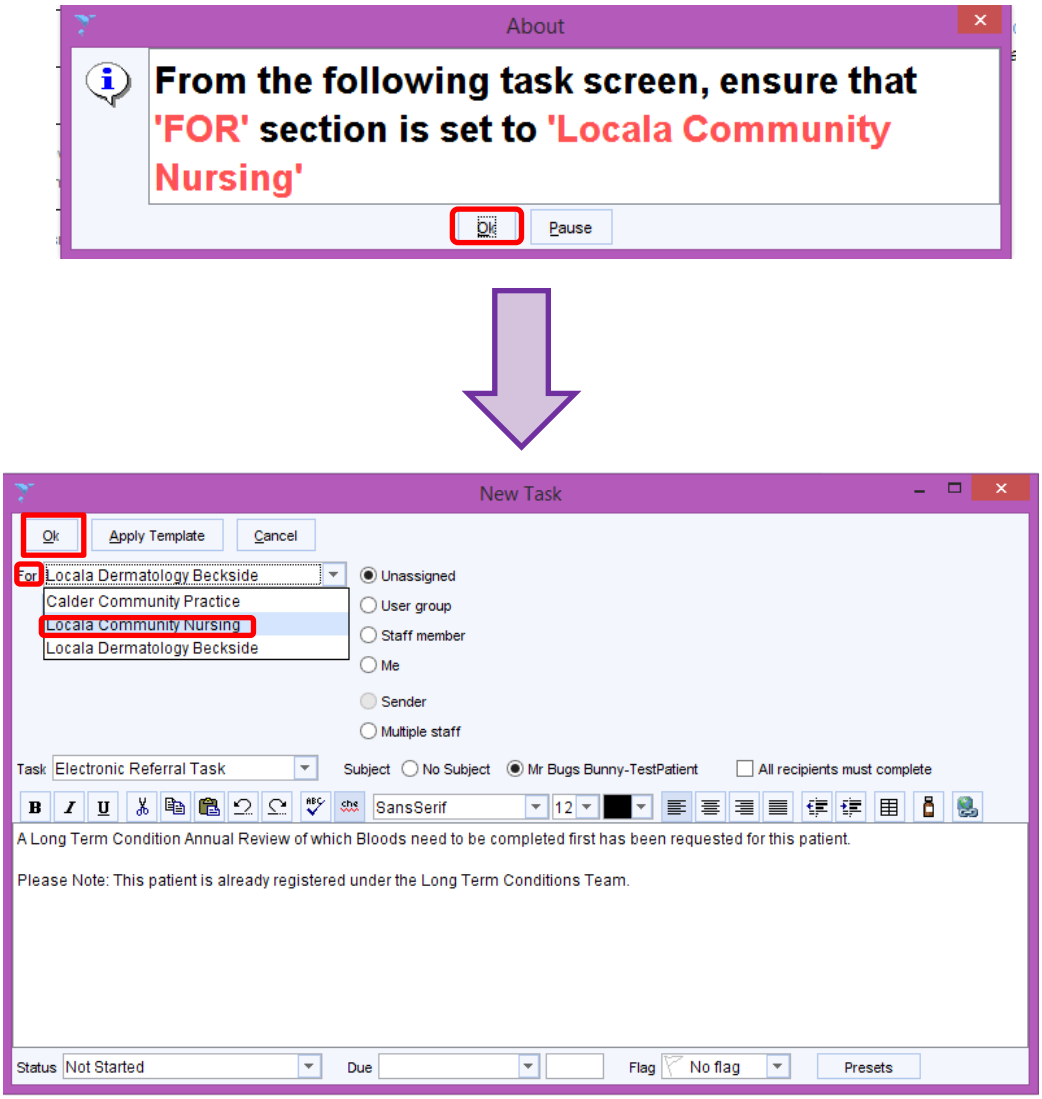


Select the 'Ok' button to proceed to the final part of the referral process. If the patient is a new referral to the LTC Team, the following referral template will appear select 'Ok' to proceed. Once you save the patient's record the referral will automatically be sent to Locala for processing.



If the patient is already registered with/ has an active referral for the LTC Team, a task will be sent to Locala to notify them that a referral has been received for processing. This will ensure no duplicate registrations within the service.

If a new referral is initiated when a patient has already been referred and is awaiting a LTC annual review, SystmOne will automatically prompt you to send a task rather than a new referral (as shown below). A task with pre- populated text will appear for you to amend as appropriate. Amend the **'For'** section of the task to **'Locala Community Nursing'** and press 'Ok'. Once you save the patient's record the task will be sent to Locala for action.

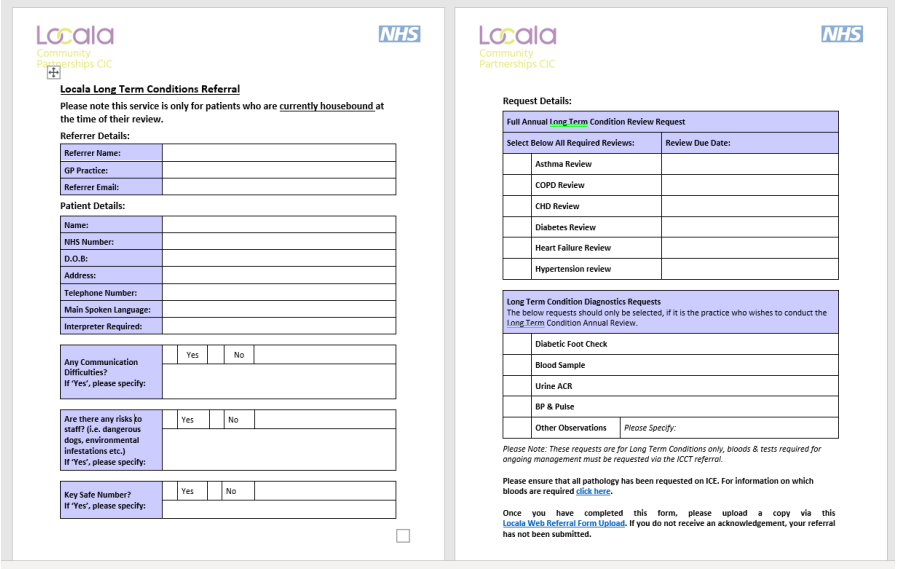


The task will be received by the Medicines Support Team and processed as appropriate.

Appendix D

EMIS - Locala Long Term Condition Referral

In order to improve the referral process for an EMIS GP Practice, a word referral document has been produced and will be shared with GP practices who use EMIS. This can be uploaded into the EMIS System to enable relevant fields to be populated by the patient record to speed up the time taken to refer.



Locala Community Partnerships CIC — NHS

Locala Long Term Conditions Referral

Please note this service is only for patients who are currently housebound at the time of their review.

Referrer Details:

Referrer Name:	
GP Practice:	
Referrer Email:	

Patient Details:

Name:	
NHS Number:	
D.O.B:	
Address:	
Telephone Number:	
Main Spoken Language:	
Interpreter Required:	

Any Communication Difficulties? If 'Yes', please specify:		Yes		No
Are there any risks to staff? (i.e. dangerous dogs, environmental infestations etc.) If 'Yes', please specify:		Yes		No
Key Safe Number? If 'Yes', please specify:		Yes		No

Locala Community Partnerships CIC — NHS

Request Details:

Full Annual Long Term Condition Review Request		
Select Below All Required Reviews:		Review Due Date:
	Asthma Review	
	COPD Review	
	CHD Review	
	Diabetes Review	
	Heart Failure Review	
	Hypertension review	

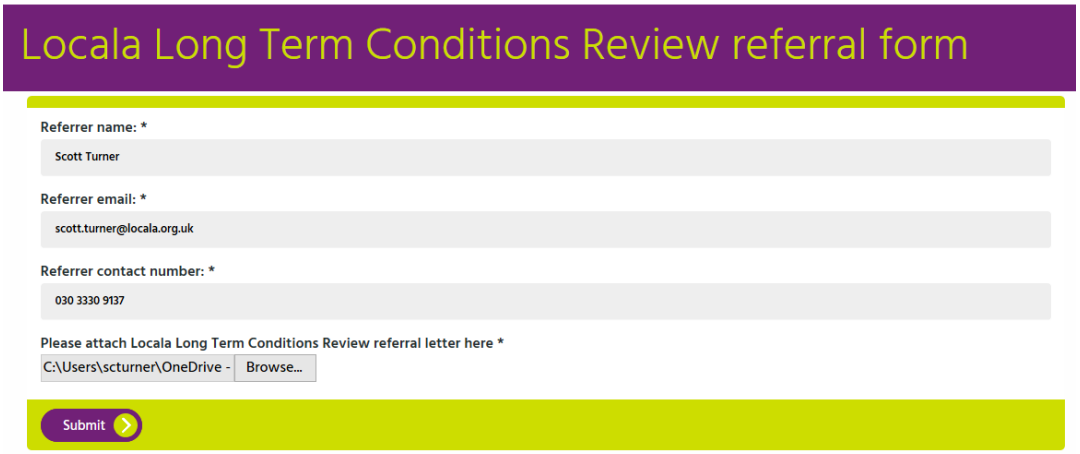
Long Term Condition Diagnostics Requests The below requests should only be selected, if it is the practice who wishes to conduct the Long Term Condition Annual Review.		
	Diabetic Foot Check	
	Blood Sample	
	Urine ACR	
	BP & Pulse	
	Other Observations	*Please Specify:*

Please Note: These requests are for Long Term Conditions only, bloods & tests required for ongoing management must be requested via the ICCT referral.

Please ensure that all pathology has been requested on ICE. For information on which bloods are required click here.

Once you have completed this form, please upload a copy via this Locala Web Referral Form Upload. If you do not receive an acknowledgement, your referral has not been submitted.

Once this form has been completed, you will complete the referral process, by accessing https://www.locala.org.uk/locala-long-term-conditions-review-referral-form/ and using the 'Browse…' button to attach the referral which has been exported from EMIS. Once uploaded, select 'Submit' to send the referral.



Locala Long Term Conditions Review referral form

Referrer name: *

Scott Turner

Referrer email: *

scott.turner@locala.org.uk

Referrer contact number: *

030 3330 9137

Please attach Locala Long Term Conditions Review referral letter here *

C:\Users\scturner\OneDrive - Browse...

Submit

Locala Long Term Conditions Referral Form

For practices who use EMIS

Please note this service is only for patients who are <u>currently housebound</u> at the time of their review.

Referrer Details:

Referrer Name:	
GP Practice:	
Referrer Email:	

Patient Details:

Name:	
NHS Number:	
D.O.B:	
Address:	
Telephone Number:	
Main Spoken Language:	
Interpreter Required:	

Any Communication Difficulties? If 'Yes', please specify:		Yes		No	

Are there any risks to staff? (i.e. dangerous dogs, environmental infestations etc.) If 'Yes', please specify:		Yes		No	

Key Safe Number? If 'Yes', please specify:		Yes		No	

Request Details:

Full Annual Long Term Condition Review Request		
Select Below All Required Reviews:		**Review Due Date:**
	Asthma Review	
	COPD Review	
	CHD Review	
	Diabetes Review	
	Heart Failure Review	
	Hypertension review	

Long Term Condition Diagnostics Request The below requests should only be selected if it is the practice who wishes to conduct the Long Term Condition Annual Review.		
	Diabetic Foot Check - *For low risk patients only. Patients with known moderate/high risk or known active diabetic foot problems should be referred to podiatry if not already under their care*	
	Blood Sample	
	Urine ACR	
	BP & Pulse	
	Other Observations	*Please Specify:*

Please Note: This referral form is for Long Term Conditions only. Bloods & tests required for ongoing management must be requested via the ICCT referral.

Please ensure that all pathology has been requested on ICE. For information on which bloods are required click here.

Once you have completed this form, please upload a copy via Locala Web Referral Form Upload. If you do not receive an acknowledgement, your referral has not been submitted.

Appendix E – Blood Test Requests

The following blood tests will be reviewed as part of the LTC annual review if requested by the practice

Long Term Condition	Blood Tests/ Urinalysis Required for Review	Optional (at practice discretion)
Hypertension	**U&Es** **eGFR** **Lipid profile**	**Urine ACR** **HbA1c** **LFTs if new statin**
COPD	**None**	
CHD	**U&Es** **eGFR** **Lipid profile**	**LFTs if new statin** **HbA1c** **Urine ACR** **FBC**
Asthma	**None**	
Diabetes	**HbA1c** **U+Es** **eGFR** **Urine ACR** **Lipid profile**	**LFTs if new statin** **FBC**
Heart failure	**U&Es** **eGFR**	**Urine ACR** **LFTs if new statin** **Lipid profile** **HbA1c** **FBC**