### **Annex B Template mobilisation plan for practice merger**

| **Area** | **Action required** | **Due date** | **Who** | **Comments/issues** | **Key contacts** | **Status** |
| --- | --- | --- | --- | --- | --- | --- |
| **1. Patients** | | | | | | |
| 1.1 Communication | Draft letter for patients |  | Practice | Letters to include details of:   * Neighbouring practices, * PALS / Health Watch * FAQs such as   + Next steps,   + Contact details of new practice   + Background new practice - Introduction   + Prescriptions   + Referrals |  |  |
| Distribution of letter to patients |  | Practice | Practice to arrange distribution |  |  |
| Telephone message to be put onto practice telephone. |  | Practice |  |  |  |
| Notice on doors & local pharmacy |  | Practice |  |  |  |
| Consider welcome message / patient group work |  | Practice | Practice to consider:   * Patient group invite * Welcome Leaflet * Poster |  |  |
| 1.2 Records | Medical records |  | Practice |  |  |  |
| 1.3 Clinical Overview | Share Plan with Medical Director |  | Commissioner |  |  |  |
|  | | | | | | |
| 2.1 Communication | Inform staff of current situation and options. |  | Practice |  |  |  |
|  | | | | | | |
| * 1. Lease | Ensure premises lease are in place |  | Practice |  |  |  |
|  | | | | | | |
| * 1. IT Plan | * IT Plan |  | Practice |  |  |  |
| 4.2 BSU Transfer of Patients | * BSU/ LASCA – merger of registered patients |  | Practice | Practice need to confirm pooled list or GP List  Any changes in GP performers need to be notified to PCSE using PCSE online by those performers  Update practice information  Agreed dates |  |  |
|  | | | | | | |
| 5.1 OTMG / RRMG | Letter to Practice 3to confirm approval for merger |  | ??? |  |  |  |
| 5.2 Practices | Letter/email to neighbouring practices to inform of merger confirmation |  | Practice |  |  |  |
| 5.3 Overview and Scrutiny | Liaise with overview and scrutiny to confirm merger date. |  | Practice |  |  |  |
| 5.4 LMC | Communication with LMC to confirm merger date. |  | Practice |  |  |  |
| 5.5 PCT comms team | Email to comms to inform them of potential media interest |  | Practice /Commissioner |  |  |  |
| 5.6 FT/ s Provider arm | District Nurses/Health Visitors to be notified to liaise with patients on caseload. |  | Practice |  |  |  |
| Palliative care manager to be informed to liaise with nurses. |  | Practice |  |  |  |
| Common Mental Illness – all mental health workers to be notified and liaise with patients. |  | Practice |  |  |  |
| Severe and Enduring Mental Health |  | Practice |  |  |  |
| Mental Health Trust |  | Practice |  |  |  |
| Midwifery |  | Practice |  |  |  |
| Business Managers at FT’s to be informed |  | Practice /Commissioner | Patients Discharged from Hospital  Local Hospitals and Trust  Mental health trust  Ambulance Service |  |  |
| 5.7 PALS | Inform PALS and complaints of merger |  | Practice | Inform of contact details for practice |  |  |
| 5.8 BSU | Need to update lists/practice information |  | Commissioner |  |  |  |
| Inform courier services |  | Practice |  |  |  |
| 5.9 CCG | Need Email to ICB to cascade to Directors. |  | Practice |  |  |  |
| 5.10 OOH | Need to notify OOH - NHS111 |  | Practice |  |  |  |
| 5.11 Regional Team | Notify directors of the NHS ICB team |  | Commissioner |  |  |  |
| 5.12 Notify other agencies | Local Pharmacies |  | Practice |  |  |  |
| Local Hospitals |
| Business Services agency (BSA) |
| SHA |
| PCSE | Check performers aligned to new practice with appropriate online submissions to PCSE |  |  |
|  | | | | | | |
| 6.1 Contract | Need to prepare contract schedule to reflect contract termination / merger contract value |  | Finance | Finance to prepare and agree sign off with practice  Capitation list size 31st March |  |  |
|  |  |  |  |  |  |  |
| 6.2 Exeter / QMAS | Administer closure of contract on Exeter system/QMAS |  | Commissioner |  |  |  |
|  |  |  |  |  |  |
| Practice to print off copy of population manager |  | Practice |  |  |  |
| 6.3 Bank Accounts | Payments and recoveries |  | Practice | To confirm:   * New / same bank accounts * If new bank account confirm term for old account staying open for payments and recoveries |  |  |
|  | | | | | | |
| 7.1 Contractual | Contract Variation to add all Partners to contract |  | Commissioner | Date to be confirmed |  |  |
| Confirm Practice agreement in place |  | Practice / Commissioner |  |  |  |
| Termination notice |  | Commissioner |  |  |  |
| Confirmation of provider name |  | Practice | To confirm if name is staying the same or changing |  |  |
| 7.2 BSU | BSU/LASCA to add end date to the Exeter contract and transfer patients |  | Commissioner | BSU to update contract details and transfer patients |  |  |
| Check performers aligned to new practice and appropriate PCSE online submitted |  | Commissioner |  |  |  |
| 1. ACTIONS FROM PATIENT ENGAGEMENT | | | | | | |
| 8.1 Appointments | Capacity of appointments |  | Practice | * Two new GPs appointed at Practice 1; * Following merger existing clinics to be reviewed to consider better allocation across the two sites; * Following merger cross site working to be implemented for clinicians, and; * Following merger structural changes to be made at Practice 2 site to accommodate more clinical sessions to increase appointment availability. |  |  |
| Continuity of GP |  | Practice | * The practices have discussed with patients that they will still be able to see their doctor although it may be at either Practice 1 or Practice 2. The practice will monitor continuity of care throughout the merger. |  |  |
| 8.2 Adequate facilities | Telephone System |  | Practice | * The practice has informed patients that there will be one improved telephone system which will be based at Practice 1 with multiple lines to improve access to the practice. |  |  |
| Capacity of waiting room |  | Practice | * Following merger existing clinics to be reviewed to consider better allocation across the two sites; * Following merger cross site working to be implemented for clinicians, |  |  |
| 8.3 Staffing | Concerns for staff |  | Practice | * The practice have informed patients that the merger will be a significant change for all, we plan to work will all of the staff to ensure a smooth positive change with benefits for our staff and patients. |  |  |