

Service overview



Reduce recall admin by 90%

Cut your weekly workload from
51 hours down to just 3.



Free up 10–15% of appointments

Minimise call-backs and missed requirements by automatically
optimising patient invites.



Maximise your claims

Easily identify high-value Enhanced Services
and ensure every claim is captured.



100% accurate, every time

Improve patient outcomes with automated checks
that ensure nothing is ever missed.

Features

- Sync with Clinical System (Optum/EMIS or SystmOne) via IM1
- Automatically Identify test & appointment requirements for all patients for all recalls (including Patient specific e.g. PSA tests), customisable per practice and incorporating blood test results. Delivered in an annual format per patient, or monthly overview for Practice admins.
- Invite patients for relevant appointments with clear invite histories for organising, via Practice Toolkit with customisable templates or external messaging system e.g. Accurx/iPlato/Engage health Systems/Hero Health.
- Manage appointments, overdue, changed or problem patients easily from one place.
- Easy reporting, KPIs of recalls and claims registers.

Why Practice Toolkit?

- Created by GPs – focused to work for Practices how they want it to.
- Real Support straight away, with a human sharing screen to resolve any queries – no more vague ticket responses 4 days later.
- Beneficial to all practices – well organised recalls takes a lot of admin time, free that time up for other practice needs. Can a human accurately process 10,000 patient needs individually for 12 months in less than 12 minutes?

What Practice Toolkit does not do

- Does not provide clinical decision-making or diagnosis, only presents relevant information for that.
- Does not replace the Practice's clinical system – this remains the single source of truth
- Does not remove the practice's responsibility for clinical governance, data quality, or patient safety

Service users and access

The service is accessed via a modern web browser (unique user logins & 2FA applies) and requires no local installation.

Staff/User access to each practice account is controlled by the Practice directly through role-based permissions.



*Streamlining the neverending recall process, ALL recalls in one place,
integration with EMIS. Excellent system clean well structured design.
Versatile and customisable features.*

Onboarding and implementation

Onboarding is intentionally simple, delivered in a supported methodology via teams sessions, and has been fully achieved with full customisation within 45 minutes.

Onboarding typically includes:

- Initial service configuration – guided by Practice Toolkit team, to invite relevant Practice staff, sync patient data via IM1, Selection of Optimisation options (e.g. Medication Review or Patient Birthday anchor months, or appointment tolerance windows for reviews undertaken recently)
- Guided setup of recall logic – guided by Practice Toolkit team, all templates based on NICE Guidelines, any adaptations to these for Practice preference is supported and which recalls to activate/process against patient data.
- Support during first use of patient invitations – to help identify the optimal efficiency approach, batch messaging to call or book online with embedded links.

Typical onboarding is completed within 90 minutes, often just by the lead Recall Admin +/- Practice Manager at their preference.

Support and service management

Support is unlimited and provided 9-5 on normal working days via phone, email, chat or sharescreen.

24/7 Access to a comprehensive Knowledge Base with step-by-step guidance, videos and training.

Security and data handling

Practice Toolkit processes patient-identifiable data provided by the customer for the purpose of recall management and patient communication.

The service is hosted on secure cloud infrastructure and designed to comply with UK GDPR and NHS data protection requirements. Detailed security and hosting information is available [here](#).

Availability and resilience

The service is designed for high availability during GP working hours. It uses resilient cloud infrastructure, monitoring, and backup processes to minimise service disruption.

Service availability and response commitments are defined through service level agreements per G-Cloud 15.

Exit and Off-boarding

No additional or hidden costs when off-boarding. On termination of the service:

- Patient data is still held in Clinical System, so no need for export and any shared records are fully purged upon termination.

Change management

Support provided to Practices to help manage change within the Practice as a result of onboarding.

The service is updated regularly to improve functionality, security, and performance. Changes are managed to minimise disruption and communicated where they may impact users.



*Each week we don't use this, we're missing 500 quid of enhanced services,
not to mention what my team could be freed up to do*

See how you can transform your practice

