### **7.11.52 – 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 |  | ICB |  |  |  |
| **2 COMMUNICATIONS** | | | | | | |
| 2.1 Communication | Inform staff of current situation and options. |  | Practice |  |  |  |
| **3 PREMESIS** | | | | | | |
| * 1. Lease | Ensure premises lease are in place |  | Practice |  |  |  |
| 1. **IT/ DIGITAL** | | | | | | |
| * 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 NPL3 form  Update practice information  Agreed dates |  |  |
| 1. **COMMUNICATIONS** | | | | | | |
| 5.1 OTMG / RRMG | Letter to Practice 3to confirm approval for merger |  | Practice |  |  |  |
| 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 /ICB |  |  |  |
| 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 /ICB | 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 |  | ICB |  |  |  |
| Inform courier services |  | Practice |  |  |  |
| 5.9 CCG | Need Email to CCG to cascade to Directors. |  | Practice |  |  |  |
| 5.10 OOH | Need to notify OOH - NHS111 |  | Practice |  |  |  |
| 5.11 Regional Team | Notify directors of regional NHS England team |  | ICB |  |  |  |
| 5.12 Notify other agencies | Local Pharmacies |  | Practice |  |  |  |
| Local Hospitals |
| Business Services agency (BSA) |
|  |
| PCSE | Check performers aligned to new practice and appropriate NPL3 forms submitted 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 |  | ICB |  |  |  |
|  |  |  |  |  |  |
| 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 |  |  |
| 1. **CONTRACTUAL** | | | | | | |
| 7.1 Contractual | Contract Variation to add all Partners to contract |  | ICB | Date to be confirmed |  |  |
| Confirm Practice agreement in place |  | Practice / ICB |  |  |  |
| Termination notice |  | ICB |  |  |  |
| 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 |  | ICB | BSU to update contract details and transfer patients |  |  |
| Check performers aligned to new practice and appropriate NPL3 forms submitted |  | ICB |  |  |  |
| 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. |  |  |