

Patient Charter Implementation Checklist

A practical working checklist for Practice Managers following the updated NHS England *You and Your General Practice* guidance.

Practice: _____ Date: _____
Completed by: _____ Signature: _____

How to use: Tick each check when completed. Record the responsible person, due date or evidence reference. Mark actions that do not apply to your local arrangements.

01 Website and patient information

Action / check	Done	Owner / date / evidence
Check the practice homepage links directly to the current NHS England You and Your General Practice document.	☐	
Remove links to outdated versions and review appointment, contact and online consultation webpages.	☐	
Check leaflets, posters, waiting-room screens and other patient information for outdated instructions.	☐	
Explain clearly how patients can contact the practice online, by telephone and in person.	☐	
Check that information is accessible, understandable and suitable for patients who need additional support.	☐	

02 Urgent requests and online access

Action / check	Done	Owner / date / evidence
Confirm online consultation availability for non-urgent requests against current contractual requirements.	☐	
Check that online consultation systems do not impose inappropriate submission caps during required hours.	☐	
Clearly explain whether urgent requests should be made online, by telephone or in person.	☐	
Review online form warnings and acknowledgement messages, including advice for worsening symptoms.	☐	
Test the patient journey on a mobile device and desktop; identify any confusing instructions.	☐	

03 Triage and response arrangements

Action / check	Done	Owner / date / evidence
Confirm how clinically urgent requests are identified, escalated and actioned on the same day.	☐	
Check non-urgent requests receive an appropriate response about next steps by the end of the next working day.	☐	
Review whether patients are ever told simply to contact the practice again another day.	☐	
Check staff understand that responding to a request does not always mean providing an appointment immediately.	☐	
Review how requests are tracked, handed over and escalated when staff are absent or demand is high.	☐	

04 Staff awareness and consistency

Action / check	Done	Owner / date / evidence
Brief reception, care navigation, administration and clinical teams on the updated charter.	☐	
Update relevant SOPs, induction material, scripts and patient communication templates.	☐	
Check all contact routes give consistent advice about urgent requests and response times.	☐	
Confirm staff know how to support patients who cannot or prefer not to use digital channels.	☐	
Record completion of staff briefings and any further training needs.	☐	

05 Feedback, concerns and complaints

Action / check	Done	Owner / date / evidence
Confirm a nominated person coordinates feedback and concerns, with clear escalation arrangements.	☐	
Check patients can find information about feedback and formal complaints.	☐	
Review how feedback is recorded, acknowledged, followed up and escalated.	☐	
Identify recurring themes and document resulting changes or improvement actions.	☐	
Agree how relevant learning is shared with staff and the Patient Participation Group.	☐	

06 Assurance and follow-up

Action / check	Done	Owner / date / evidence
Allocate an owner and target date for each outstanding action.	☐	
Retain evidence of website updates, SOP changes and staff communications.	☐	
Sample urgent and non-urgent requests to check that actual practice matches published information.	☐	
Monitor patient feedback for confusion about access routes and response expectations.	☐	
Schedule a follow-up review and revisit arrangements after material process or guidance changes.	☐	

Review summary and next steps

Priority actions:

Lead / accountable person:

Target completion date:

Evidence / follow-up review:

Need a helping hand?

Need support implementing the updated patient charter?

Locum PM can help your practice review patient access arrangements, identify gaps, update processes and support your team through the changes.

Get in touch: www.LocumPM.co.uk

Reference: NHS England, *You and Your General Practice* — <https://www.england.nhs.uk/long-read/you-and-your-general-practice/>
This is a practice assurance aid, not a substitute for checking the current charter, GP contract and NHS England implementation guidance.