

Aireborough Family Practice



PPG Email Setup and Guidance

A Leeds PPG Network project

December 2023, V3.1

PPG Emails - Background

The Leeds office of the Integrated Care Board in West Yorkshire (ICB in Leeds) has worked closely with members of the Patient Participation Group (PPG) Network to bring email addresses to each PPG in Leeds. This means that each group now has a dedicated email address that can be used to conduct PPG related business.

We believe that having a dedicated email address will ensure that:

- ✓ Patients at your practice know how to get in touch with the group to join or give feedback.
- ✓ Your PPG will have improved communication with other PPG members, the practice, other PPGs (they all have one too), the ICB in Leeds, and local organisations that may support your work.
- ✓ You will receive dedicated 'PPG updates' from the ICB in Leeds in the form of a regular newsletter giving you tips and opportunities to get involved.
- ✓ You can develop your groups 'online presence', if you choose to. This could include creating a social media presence for your PPG as well as signing up for relevant information, and updates from across the country (such as the National Association for Patient Participation, NAPP).
- ✓ Your work is carried out confidentially and securely.

This simple guide over the next few pages outlines:

- Setting up your PPG email
- How to login to your PPG email
- What your PPG email can be used for
- Some things to remember with regards to procedure and using the email address correctly in line with data protection.
- What to do if you're having difficulties with something
- A checklist of things to do to make sure you're getting the most from your email.

PPG email address: PracticeName.PPG@outlook.com

Login: <https://outlook.com/> (bookmark / favourite this page)

*Please note that this document is an evolving guide, we will continue to update this as we receive feedback from practices and PPGs.

We are asking each PPG, with the support of their practice, to follow the steps in this document to set up their PPG email address. We have chosen to use '@outlook.com' addresses as it provides simple and free access to an email account.

It was the original aim to setup NHS Mail address (@nhs.net), however there were some issues with this approach.

As PPG Chairs / members* are not NHS or Practice employees, there would be Information Governance implications around providing them access to NHS Mail, the National Directory, and the additional functionality attached to NHS.net accounts like Teams and Office365 licensing.

Setting the PPG account up on Outlook.com allows simple compatibility with calendars used by staff in the NHS but removes the Information Governance concerns.

The PPG Email project group of the Leeds PPG Network have worked together to develop the information needed to use PPG emails effectively. We have worked with staff from the Information Governance and IT teams to consider different aspects. If the following information is followed and adhered to, we think that the PPG Emails project will be a success.

Guidance contents:

1. Setting up your PPG email
2. Using Your PPG Email
3. Using your PPG Email (Agreement)
4. Let's get going checklist
5. Tips and resources

ACTION: It is essential you read this document fully before using your PPG email.

ACTION: After you have set up your PPG email, we ask that you stop using any other email addresses you might have been using for PPG related work if they are personal email addresses (i.e., have someone's name in it and not specifically for a PPG).

- If you have a dedicated email address for your PPG, that isn't someone's personal account, then you do not need to stop using it, unless you'd prefer to switch to the new one. If you do continue using your existing one, please let adam.stewart1@nhs.net know the address to add to his mailing list.

*Please note that this project gives access to the email to one patient PPG member and one member of the practice. It is designed to be a patient PPG member led email, when that person is available and willing to be involved.

As the PPG is the responsibility of the practice, and therefore is part of the practice, we have agreed that a member of the practice should have access to the email address to provide support to PPGs if needed. This will provide continuity and security for maintaining the account should a PPG member leave or become unavailable.

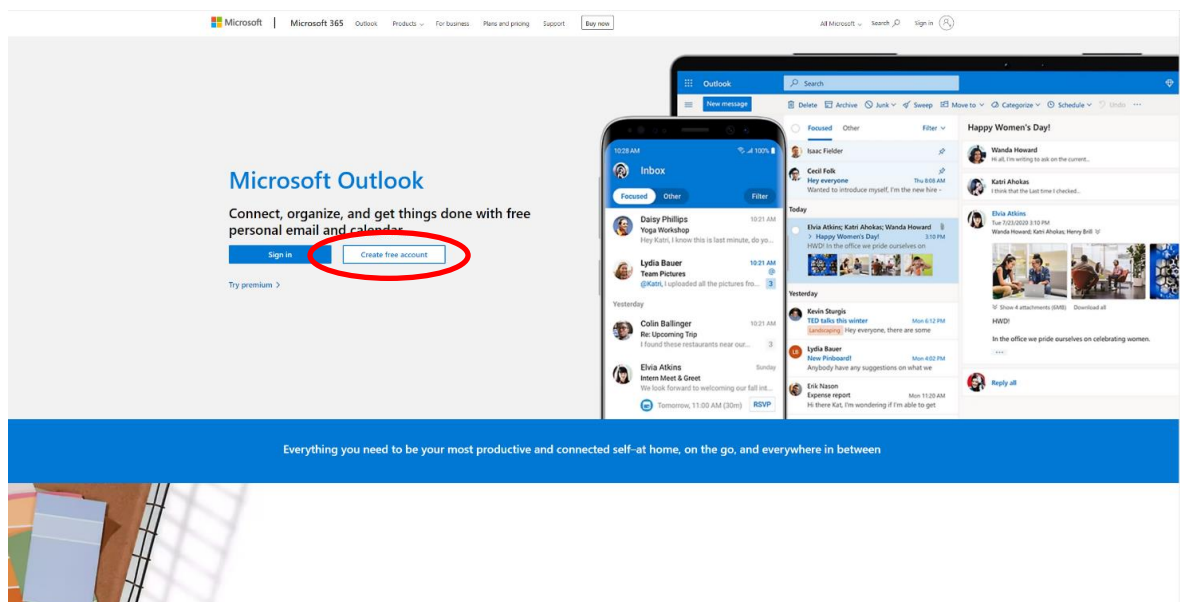
Setting up your PPG email

It was the original intention to setup the PPG email addresses for each group ahead of rolling them out. However, security related issues stopped us being able to roll them out in this way.

We are asking each PPG to follow the steps below to set up their PPG email address. We have chosen to use '@outlook.com' addresses as it provides simple and free access to an email account. It will also be compatible with calendars used by staff in the NHS.

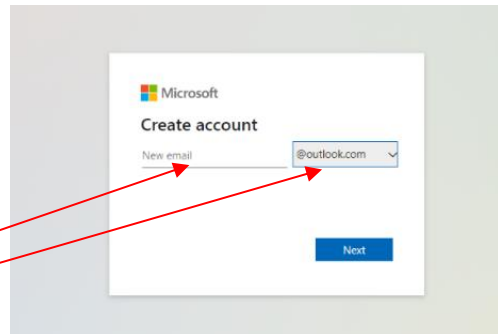
You will need access to the internet, using either Google Chrome, Microsoft Edge, Safari or Mozilla FireFox as your web browser (please note that you cannot use Internet Explorer, it is out of date and no longer supported).

1. To begin, visit: <https://outlook.live.com>



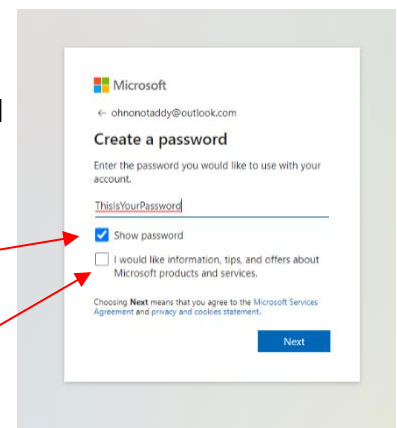
You should see the above page (correct as of December 2023). Click the 'create free account' button.

2. You will then be taken to the next screen which will ask you to enter an email address, please enter the allocated **PracticeName.PPG** into the appropriate box and select @outlook.com



3. The next screen will ask you to create a password. The password should be at least 12 characters and a combination of upper and lowercase letters, numbers and a symbol (such as: ! ? £ % &)

- a. If you want to make sure you have entered the password correctly, click the 'show password' button to reveal what you have typed.
- b. Be sure to untick the second box about receiving emails from Microsoft (this is just to keep things simple in your inbox).
- c. Make sure you make a note of the password somewhere safe, and be sure to let the other person with access know about it.



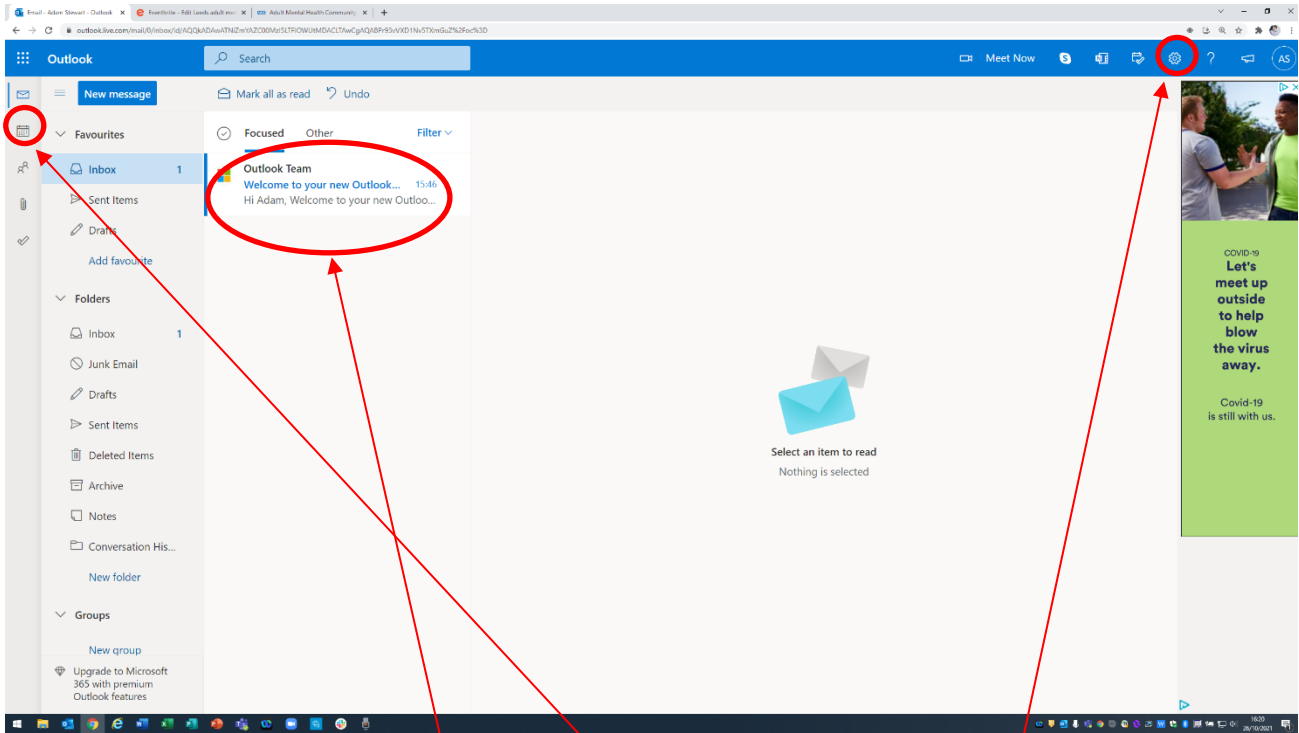
4. The next screen will be asking for your first and last name. Please enter the name of your surgery:
 - a. First name: **Practice Name**
 - b. Last name: PPG
5. You will then be asked to select the country and enter a birthdate. Please select:
 - a. Country / region: United Kingdom
 - b. Birthdate: January 1, 1997
6. After this you will be able to login to your account using your details, as above (repeated below).

PPG email address: PracticeName.PPG@outlook.com

Click this link to login: <https://outlook.com/> (bookmark / favourite)

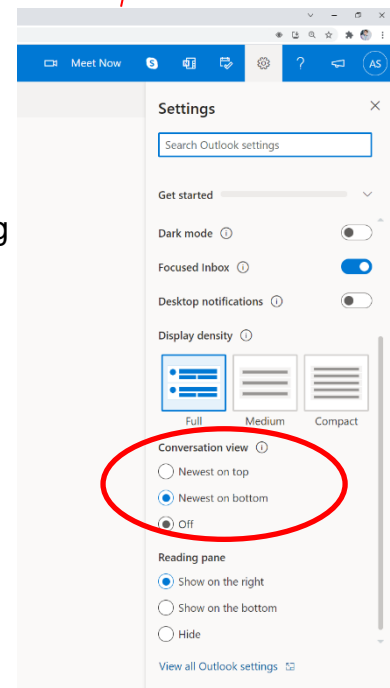
1. Using your PPG email

When you login to your account using the details provided above, you will be met with the following screen.



From here you will be able to:

- Access and respond to emails you receive.
- Access and book meetings / reminders in your calendar
- Change and update your settings.
 - We recommend going to your settings and turning off 'Conversations'. This will make your emails appear as separate emails rather than a part of a conversation, making them easier to read and manage. You can view the settings by clicking on the cog icon in the top right of the image above (see image to the right).



2. Using your PPG email (agreement)

We want to make sure that PPG emails are used in the best way that they can. The PPG email project group has come up with some guidance, below, that we require all users of PPG emails to agree and adhere to.

Any users who do not follow the guidance as below may be personally responsible for any data breach concerns (if applicable).

Agreement

As a designated PPG email user, I will:

- Not share the details of the PPG email with anyone except the Practice Manager (or PPG lead for the practice), and only if needed.
- Not share the password with anyone other than the practice lead for PPGs.
- Change the password if I'm a new member accessing the PPG email account and share with the practice lead accordingly.
- Adhere to the General Data Protection Regulations (GDPR) and Privacy and Electronic Communications Regulations (PECR), which means that I will:
 - Ensure people know why they are being contacted.
 - Understand how their contact information will be used (if held on a mailing list)
 - Give people the option to unsubscribe / stop receiving communications on request.
 - Contact the involvement team, at the ICB in Leeds if I am unsure (wyicb-leeds.comms@nhs.net or call 0113 221 7777)
- Only contact people who have agreed to be contacted (signed up to receive updates or be on a mailing list or contacted you directly via the PPG email).
- Not use the email address for anything other than PPG business.
- Respond to any emails in an appropriate and polite manner.
- Be objective and fact based in my communications.
- Communicate only what I am confident about, seeking help from staff at the practice if I am unsure.
- Forward any emails I receive that I am unsure about to the practice manager (or PPG practice contact)
- Direct emails to the most appropriate person to address when it is suitable to do so.
- Not disclose any confidential information I view with anyone other than practice staff, or within the permissions given by the patient (i.e., they may want you to anonymously discuss the issue in a PPG meeting).
- Ensure the [task list](#) in this document is complete before using the PPG email.

Let's get going checklist!

Before you start using your PPG email there are a few tasks that we ask you complete to help get the best use from your PPG email. Head to [Tips and Resources](#) in this document if you're not sure about some of the features.

This is to help you use different features of your new email address.

Complete this checklist as soon as possible (click in the box to check it off)

Checklist

- Set up your PPG email using the details and guidance as above.

- Add adam.stewart1@nhs.net to your address book (People menu).

- Email your PPG members, informing them of the new email address and that this is the means to contact the chair and to discuss PPG business (please CC: adam.stewart1@nhs.net this is so he can add the now 'live' email address to his list).

- Add your PPG members email addresses to a new contact list called 'PPG Members'

- Add PracticeName.PPG@outlook.com with [accompanying brief](#) to the practice website (an example can be found in the next section), the practice contact can help with this.

- Email adam.stewart1@nhs.net from your PPG email including a link to the practice website page that displays updated information about contacting the PPG and the PPG email address.

- Using the calendar feature, book in your upcoming PPG meetings, and invite your PPG members to the meeting.

Tips and resources

Here are the first of a series of useful tips and resources to help you get started using your PPG email.

Please edit as needed to make these resources relevant to you practice and PPG.

If you have any suggestions or feedback, please don't hesitate to get in touch.

Building a contact / mailing list

It is likely that you will want to build a distribution list of interested patients who want to stay in touch with the PPG and find out what you've been up to.

We recommend doing this as it creates a good base for you when you want to carry out an activity and you want to let people know about it.

To do this, people need to 'agree' or 'sign-up' to be on your list. This can be done by you asking and them agreeing, or by them requesting to be on your mailing list.

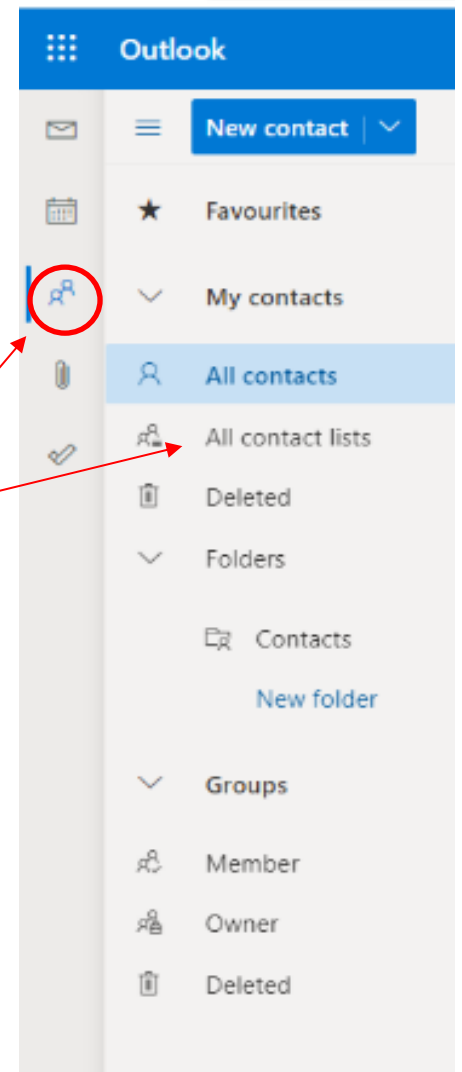
Use the 'People' tab (on the far left of the symbols) to add people to your PPG email address book.

You can also create 'contact lists'. If you had a newsletter, for example, you could add everyone who wants to receive an email newsletter to that list so you can contact them all at once!

We recommend promoting the opportunity to join the mailing list at all opportunities.

Please note that you can't contact all patients for PPG related activity via options such as MJOG (text messaging service) unless people have agreed to be contacted (but you can occasionally let them know about the PPG using text messaging, see the [PPG Toolkit](#) for guidance on that).

Do not store people's contact name and email anywhere other than within the built-in 'People' tab (for example, don't store in an Excel spreadsheet as well, it's easier to have one list to manage).



Writing an email

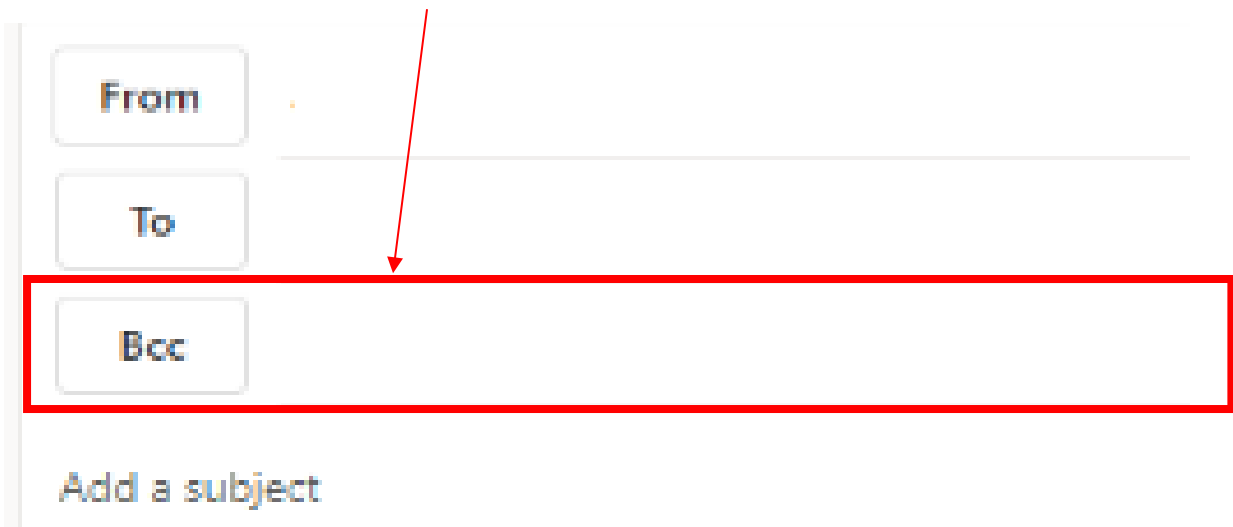
When you are writing an email, there are some things to bear in mind:

- Bcc (blind copy):
 - This is essential. When you are writing to a mailing list you must make sure that all email addresses are added into the 'Bcc' line where you enter email addresses. This means that people who receive your email will not see the email addresses of others. This a crucial part of data protection.

To 'Bcc' people into your email, first select 'New Message' as you would normally. Then when you are presented with a blank email as in the below image, select the 'Bcc' button on the far right of the screen in the top right corner.



This will create a 'Bcc' address bar underneath the regular 'To' address bar. Simply add your email addresses into the 'Bcc' bar and not the 'To' one.



- Email content guidance
 - Try to keep your emails simple and clear.
 - Try to keep sentences relatively short in length (15-20 words) to make them easy to read.
 - Make sure any acronyms are spelt out before being used, for example “Integrated Care Board (ICB) in Leeds” or “We are your Patient Participation Group (PPG) for the practice.”
 - If you are referring to something that can be found online, it’s helpful to include a weblink.
 - If you are asking people to do something (fill in a survey, respond to the email) make it clear in your ask – you could even mark it as an **ACTION**.
 - If you have a bit to cover in your email, break up the content with headings.
 - To help with accessibility, avoid using italics or underlining anywhere in your email (underlining in hyperlinks is fine)
 - Make sure your font colour is black and is at least 12pts in Arial.
- Attachments
 - You can include attachments as needed (such as PDFs or Word documents). Include both if you can, some people won’t have access to Word and others won’t be able to use PDFs. These documents need to be as accessible as possible (easy to read, plain English etc.).
 - Think about what you’re sending and what you’re asking people to do with them. Would some people prefer a printed copy to read it and make notes?

Unsubscribing

As a result of GDPR, you are required to give people the opportunity to unsubscribe from any communications / mailing lists on all communications*. It doesn’t need to be anything complicated or long-winded. The below is a good example:

“We are sending you this email because you agreed to receive updates about the work of the Patient Participation Group (PPG) at **Practice Name Surgery**. You can unsubscribe any time by replying to this email with the word ‘unsubscribe’.”

*This refers to all communications that are to a mailing list or group of people (such as for a newsletter). If you are talking to someone in a one-to-one email exchange when they have contacted you, this isn’t required as the consent to be communicated to is agreed by the person emailing you. Similarly, it is unnecessary for PPG members.

If someone unsubscribes, you must remove them from your list immediately and not send any further communications unless they request it or email you directly.

Promoting your email address

The ICB in Leeds will be keeping a log of all PPG email addresses so they can contact you directly about opportunities that we hope your PPG will be able to support. It is important that you add your PPG email address to your practice website, so your patients know how to share their feedback and get more involved in shaping how the practice delivers services.

We will also be adding all PPG email address to the Leeds Health and Care Partnership (HCP) website here: <https://www.healthandcareleeds.org/have-your-say/shape-the-future/find-out-about-other-involvement-work/ppg/ppg-emails/contact-list/>

We've provided an example of some text you might want to add to your site, feel free to make it work for your practice:

“The Patient Participation Group (PPG) is here to work with the patients and staff of **Practice Name Surgery** to ensure that the practice delivers the best care everyone registered.

We can't do that without hearing from you, the patients. If you would like to share your experiences, are interested in joining the PPG as a member, or want to find out more about future opportunities to have your say about how our practice delivers primary care services then please join our mailing list. All you need to do is drop us an email on PracticeName.PPG@outlook.com. You can unsubscribe at any time.

Please note that PPGs cannot deal with formal complaints, please use our complaints procedure, which you can find here: [include link to how to make a complaint](#). They can also not carry out inquiries or get in touch with a particular member of staff at your practice.

Anything you send via the PPG email will be viewed by a member of the group, who is a usually a patient themselves. Please only send what you are comfortable sharing.”

Receiving confidential / personal information

If you include the statement above with your PPG email address, you are setting expectations should a patient get in touch with a formal complaint or include personal information.

If you receive personal information that is beyond someone sharing their experiences and it isn't felt appropriate to be handled by the PPG, you must forward the email to the Practice Manager (or nominated member of staff) and reply to the sender telling them you have done this, and you will be deleting their original email and that it will be picked up by the practice (if appropriate).

Limitations with your email

Your PPG email address will be brand new once you've set it up. For security reasons and to prevent spammers, Outlook has some built-in limitation tools that are placed on new accounts when they are set up. These tend to disappear through regular use once Outlook is sure you're not a spammer:

Contacts limit

When you first get started you will find that any emails addressed to a lot of people will not be successful. To start with, you will need to send emails to no more than **nine** people in one go. If you want to send the email to more than nine people, you will have to send the same email multiple times. This limit usually goes after a month or so.

Send limit

Like your contact limit, you may only be able to send a smaller number of emails to start with. This is around 10-12 emails a day in the first instance. This limit will go after time, usually within the first couple of weeks, up to a month.

Verification

You may be asked to verify your email account if you send a lot of emails daily when the account is still new. To check you're not a spammer Outlook may ask you to verify your account. To verify your account, follow this link and select the 'verify' button:

<https://support.microsoft.com/en-us/office/how-to-verify-your-outlook-com-account-0b493d5c-9390-45ca-81b6-1bb1314caba9>

Backup / security

You will likely be asked at some point to add a backup email address or phone number in case you lose your password. Make sure whichever email you use is one you have easy access to. You will need to enter a verification code from that address when it asks for that prompt.

Social media

With an email address, you might be considering setting up social media accounts to promote the work you are doing in your group, or to start an online community / dialogue via platforms such as Facebook or Twitter. We encourage you to explore this and think about how you can use these platforms to help your PPG.

We would recommend looking at our training slides on social media training (Sessions 4a and 4b) which are available on our website here:

<https://webarchive.nationalarchives.gov.uk/ukgwa/20220902102524/https://www.leedsccg.nhs.uk/get-involved/getting-more-involved/training/>

If you are planning to use social media, please discuss with your PPG and practice about how this will work and what you will use it for. Some guiding principles:

- You are representing the practice and your PPG. Social media for PPGs can only be used for PPG / practice business, no personal agenda, or personal opinions.
- You will likely receive feedback and comments not necessarily related to the topic.
 - Think about how you capture this feedback so it can be used to help develop services. It might be a good idea to setup a simple spreadsheet to capture the comments anonymously. Checkout the PPG resources page on the Leeds Health and Care Partnership website for a simple template: <https://www.healthandcareleeds.org/have-your-say/shape-the-future/ppg/resources/>
 - Don't engage with those conversations if you do not have a clear, factual answer.
 - Respond to the comment acknowledging the feedback and stating that you will forward to the practice staff:
 - "Hi, thanks for your feedback. I can't respond to this myself, but I will forward to the practice. If you have a complaint, I advise you contact the practice directly."
- It's important to try make your social media engaging, using the different tools each platform has (using images, polls, videos etc.) which can be good for getting people involved.
- What could you use it for?
 - Sharing events and surveys to get more people involved.
 - Showing photos and videos of events taking place (with appropriate consent).
 - Live stream your meetings so people can watch discussions take place.
 - Keep conversations going between your patients and the practice.
 - Share other opportunities by local partners / organisations in the area.