

Partners Playbook

Practice Copilot Pack

A free, practical starter kit for GP partners in England

Inside

The NHSmail rules in plain English, a reliable prompt formula, twelve copy-and-paste workflows and a final human-review checklist.

Reviewed 9 August 2026

Independent guidance - not endorsed by or affiliated with NHS England or Microsoft. General information, not legal advice.

Start here: know which Copilot you have

The word Copilot covers different products. Your account and licence determine what the tool can access and which features are available.

COPILOT CHAT	MICROSOFT 365 COPILOT
Included for NHS.net Connect users. Primarily a web-grounded chat. Give it source material deliberately by pasting text or uploading a file.	The licensed product. Works inside Microsoft 365 apps and can use work content the user already has permission to access.
Best starting point: everyday administrative work.	Extra responsibility: permissions, labels and organisational readiness.

Is Copilot just ChatGPT inside Microsoft 365?

Not quite. Copilot is a Microsoft product. It can use AI models from OpenAI and other providers, while Microsoft adds the account, security, permissions, web search and Microsoft 365 connections around them.

If you are not sure

- Open m365.cloud.microsoft/chat while signed in with your nhs.net account.
- Ask your Local Administrator which Copilot licence is assigned to you.
- Do not assume that seeing a Copilot button means you have the licensed product.

The rules first

NHSmail policy allows Copilot for administrative and business support, including clinical administration involving sensitive information. It must not be used to make clinical decisions or for activity requiring clinical judgement.

The practical boundary

Treat Copilot as a capable administrator, never as a clinician. If the task needs a clinical opinion, decision or explanation, stop and leave that part for the responsible clinician.

Three standing obligations

- Check every output before it is used or shared.
- Label AI-assisted content as required by the NHSmail policy.
- Follow your organisation's local policy where it is more specific.

Use sensitive information deliberately

- Sign in with the correct nhs.net account and confirm enterprise protection is active.
- Use the minimum personal or sensitive information necessary for the administrative task.
- Do not copy material into this PDF or the Partners Playbook website; add permitted source material only inside the protected NHS Copilot environment.
- Remember that prompts and responses are retained and auditable within the NHS tenant.

Before anything leaves the practice

Check names, facts, dates, figures, sources, tone, recipients and the clinical-judgement boundary. Record who checked the final version and when.

A reliable prompt formula

A good prompt is a short working brief. Build it from these six parts.

1. ROLE AND CONTEXT	You are helping a GP partner in England with an administrative task.
2. TASK	State the exact output you need and what decision or action it should support.
3. AUDIENCE	Say who will read it and what they already know.
4. SOURCE	Paste or upload the source and tell Copilot not to add unsupported facts.
5. FORMAT	Specify tone, length, headings, bullets, tables or placeholders.
6. CHECKS	Tell it what must be verified and where clinical judgement must be left blank.

The default safety ending

Do not invent facts. Mark anything that needs a current source as [VERIFY]. Stay on the administrative side of the task and leave anything requiring clinical judgement for the responsible clinician. End with a short 'Checks before use' list and the line: AI-assisted draft - checked by: _____ Date: _____

A useful habit

For complex tasks, start with: Before you do anything else, ask me up to five short questions that would help you do this well. Wait for my answers, then complete the task.

PROMPT 1 OF 12 - GETTING STARTED

Make Copilot ask first

Use it for: Any task where you would normally have to write a long brief.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
The outcome, audience, deadline, preferred format and any source you expect it to use.	Patient or staff identifiers, clinical details, or confidential material that is not necessary to frame the task.	Its questions cover purpose, audience, source material, deadline and who will review the result.

COPY-AND-PASTE PROMPT

Before you do anything else, ask me up to five short questions that would help you do this task well. Wait for my answers, then complete the task.

The task: [describe what you need, for example: draft a letter to patients about our new appointment system]

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

PROMPT 2 OF 12 - GETTING STARTED

Set the scene for the whole chat

Use it for: The first message of any working session.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
Approximate practice size, relevant staff groups, the task audience and any local policy that matters.	Names, NHS numbers, identifiable cases or exact confidential figures unless the later task genuinely requires them.	It uses English general-practice terminology and flags anything that needs a current authoritative source.

COPY-AND-PASTE PROMPT

You are helping the managing partner of an NHS GP practice in England with practice administration. Our practice has [number] patients, [number] GPs and [number] other staff. Use UK terminology and keep NHS England policy and UK employment law in mind. When you are not certain something is current, say so and tell me what I should verify. My first task: [task]

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

PROMPT 3 OF 12 - MEETINGS

Minutes from rough notes

Use it for: Turning scribbles into formal minutes in one pass.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
Attendees, apologies, rough notes, confirmed decisions, action owners and genuine deadlines.	Identifiable patient, complaint or significant-event details; use the minimum information needed for the record.	Attendance, decisions, action owners and dates against the original notes before the minutes are circulated.

COPY-AND-PASTE PROMPT

I will paste rough notes from our partners' meeting. Turn them into formal minutes with: attendees and apologies; numbered items, each with a short summary of the discussion; decisions clearly marked; and an action table at the end with columns for action, owner and deadline. Use initials rather than full names. Stick strictly to what is in my notes and do not add anything.

The notes: [paste your notes]

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

PROMPT 4 OF 12 - MEETINGS

An agenda that runs to time

Use it for: The monthly partners' meeting.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
Meeting length, standing items, decisions needed, paper owners and any immovable deadlines.	Identifiable complaint, patient or staff-case details in agenda titles or papers sent more widely than necessary.	The timings add up, decision items come early, and every paper or preparation task has an owner.

COPY-AND-PASTE PROMPT

Draft an agenda for our monthly partners' meeting, which lasts 90 minutes. Standing items: finance update, staffing, complaints and significant events, contract and QOF progress, premises, any other business. This month we also need to decide on [topic]. Put the decision items early, give every item a realistic time allocation, and note what preparation each item needs and from whom.

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

PROMPT 5 OF 12 - STAFF AND HR

A job advert worth applying to

Use it for: Vacancies you need filled quickly.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
Approved role, hours, pay range, location, responsibilities, application route and closing date.	Invented benefits, discriminatory criteria, unapproved pay promises or a person's private contact details.	Hours, pay, duties and dates are accurate, essential criteria are defensible, and the final advert has HR approval.

COPY-AND-PASTE PROMPT

Draft a job advert for a [role] at our GP practice in [town]: [hours] hours a week, salary [range]. Structure it as: a warm two-line opening; a short paragraph about the practice that I can edit; key responsibilities as bullet points; a person specification split into essential and desirable; and how to apply by [closing date]. Professional but human in tone. Do not invent facts about the practice. Leave square brackets wherever you need information from me.

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

PROMPT 6 OF 12 - STAFF AND HR

A policy first draft

Use it for: Getting a policy from blank page to reviewable.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
The current local policy, named owner, review cycle and the authoritative legal or NHS sources to follow.	Real incident details, unsupported legal wording or claims that a draft has already been approved.	Sources are current, responsibilities match real workflows, and the appropriate governance lead signs it off.

COPY-AND-PASTE PROMPT

Draft a [policy name] policy for a GP practice in England, with sections for purpose, scope, responsibilities, procedure and review date. Wherever the right wording depends on current employment law or NHS guidance, do not guess. Insert a clearly marked note telling me what to verify and where. This is a first draft for internal review, not a finished policy.

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

PROMPT 7 OF 12 - PATIENT COMMUNICATIONS

Plain-English rewrite

Use it for: Announcements, posters and website updates.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
Approved facts, the action patients should take, relevant dates and the correct contact route.	Patient information, internal discussion, unsupported promises or jargon that has not been explained.	Every fact, date, number and action remains correct; test the reading level and the text-message character count.

COPY-AND-PASTE PROMPT

Rewrite this practice announcement for patients: reading age of about 11, friendly but clear, under 150 words, no jargon. Keep every fact exactly as I wrote it and change only the language. Then give me a second version as a text message of under 320 characters.

The announcement: [paste]

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

PROMPT 8 OF 12 - PATIENT COMMUNICATIONS

A complaint acknowledgement with the right tone

Use it for: The first response, before the clinical account is ready.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
An anonymised summary, the concerns being acknowledged, the response process and a realistic next-contact date.	Names, NHS numbers, unnecessary identifiers, a clinical explanation, findings not yet established or promises outside policy.	Tone, facts and timescales; ensure the responsible GP completes clinical sections and an authorised person reviews the letter.

COPY-AND-PASTE PROMPT

I will paste an anonymised summary of a patient complaint. Draft a first-response letter that acknowledges the complaint, shows empathy without admitting fault, sets out our understanding of the concerns, and explains how we will look into it and when they will hear from us. Wherever a clinical explanation belongs, insert the placeholder [CLINICAL RESPONSE - responsible GP to complete] rather than writing it yourself.

The summary, with names and identifiers removed: [paste]

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

PROMPT 9 OF 12 - DOCUMENTS AND DATA

Digest a long document

Use it for: Contract updates, ICB papers and anything over ten pages.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
The complete current document and the practice question you need the summary to answer.	Unrelated attachments or confidential information that is not needed to understand the document.	Figures, dates, deadlines and section references against the source, including material the summary may have omitted.

COPY-AND-PASTE PROMPT

Here is a long document. Summarise it for a GP partner: first, five bullet points on what it says; then the three things most likely to affect a practice's workload or income, each with a pointer to the part of the document it comes from; finally, any dates or deadlines it contains.

The document: [paste the text, or upload the file]

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes /
No

PROMPT 10 OF 12 - DOCUMENTS AND DATA

The Excel formula, explained

Use it for: Rotas, finance sheets and search results you manage in Excel.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
The sheet layout, relevant cell ranges, a dummy example and the result you expect for that example.	Patient-identifiable rows, real payroll details or a full workbook when a small fictional example is enough.	Test known examples, blank cells and copied rows; verify ranges, absolute references and any locale-specific separators.

COPY-AND-PASTE PROMPT

I manage our practice rota in Excel. I want a formula that [describe what you want, for example: counts how many sessions each GP is rostered for in a month from a grid of initials]. Give me the formula, tell me exactly which cell to put it in, and explain how it works in plain English so I can adjust it myself later.

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

PROMPT 11 OF 12 - PLANNING AND COMPLIANCE

An outline business case

Use it for: Anything you need the partnership to agree to.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
The problem, realistic options, cost assumptions, expected benefit, timescale and decision criteria.	Identifiable staff or patient data, invented supplier prices, unsupported savings or a pre-decided recommendation.	Arithmetic, assumptions, sources, risks and conflicts of interest; leave the final recommendation to the partners.

COPY-AND-PASTE PROMPT

Build an outline business case for [proposal, for example: recruiting a clinical pharmacist through the ARRS scheme]. Sections: the current problem; the options, including doing nothing; the costs, written as a list of questions for me to answer; the expected benefits; the risks and how we would reduce them; and a recommendation section left blank for the partners. Ask me your cost questions first, then produce the outline.

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes /
No

PROMPT 12 OF 12 - PLANNING AND COMPLIANCE

A CQC preparation checklist

Use it for: Getting ahead of an assessment.

PREPARE FIRST	DO NOT INCLUDE	CHECK BEFORE USE
The current CQC framework, your evidence map, named owners and the date each item was last reviewed.	Fabricated evidence, unsupported claims of compliance or identifiable examples where anonymised evidence will do.	Every quality statement is current, cited evidence actually exists, and gaps have an owner and completion date.

COPY-AND-PASTE PROMPT

Create a preparation checklist for a CQC assessment of a GP practice under the well-led key question. Organise it by CQC's quality statements and, for each one, suggest the kind of evidence a practice could show. CQC's approach changes over time, so start the checklist with a note reminding me to check the current framework on [cqc.org.uk](https://www.cqc.org.uk) before relying on it.

Human review

Checked by: _____ Date: _____ AI-assisted content labelled: Yes / No

Blank prompt brief

Use this page before opening Copilot. Keep the brief generic; add permitted source material only after signing in with your nhs.net account.

OUTCOME	What do I need Copilot to produce?
AUDIENCE	Who will read or use it?
SOURCE	What approved material will I paste or upload?
FORMAT	Tone, length, headings, table or other structure?
BOUNDARY	What must be left for a clinician or professional adviser?
CHECKER	Who will check the final output?

Turn the brief into a prompt

You are helping a GP partner in England with an administrative and business-support task.

Task: [outcome]

Audience: [audience]

Source: [what I will paste or upload]

Format: [tone, length and structure]

Before you start, ask me up to five short questions if essential information is missing. Do not invent facts. Mark current or unsupported points [VERIFY]. Do not make clinical decisions. End with 'Checks before use' and an AI-assisted draft label.

Final review checklist

Complete this before an AI-assisted output is circulated, published, filed or used to support a decision.

- ☐ I used the correct nhs.net work account and followed local policy.
- ☐ The task stayed within administrative and business support.
- ☐ No clinical decision, explanation or judgement was delegated to Copilot.
- ☐ Only the minimum necessary personal or sensitive information was used.
- ☐ Names, dates, figures, deadlines and contact details match the source.
- ☐ Legal, contractual, NHS and CQC claims were checked against current authoritative sources.
- ☐ The output does not invent evidence, commitments, benefits, prices or savings.
- ☐ Tone, reading level and recipients are appropriate.
- ☐ The AI-assisted content is labelled where required.
- ☐ A named person has approved the final version.

Sign-off

Checked by: _____ Role: _____ Date: _____

Sources and further reading

NHSmail support - Introduction to M365 Copilot Chat

<https://support.nhs.net/knowledge-base/introduction-to-m365-copilot-chat/>

NHSmail support - M365 Copilot Acceptable Use Policy

<https://support.nhs.net/knowledge-base/m365-copilot-acceptable-use-policy/>

NHSmail support - Which version of Copilot is right for me?

<https://support.nhs.net/knowledge-base/which-version-of-copilot-is-right-for-me/>

Microsoft Learn - Data, privacy and security for Microsoft 365 Copilot

<https://learn.microsoft.com/en-us/copilot/microsoft-365/microsoft-365-copilot-privacy>

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