INFORMATION FOR PATIENTS ABOUT PATIENT ONLINE

Patients need to be well informed to make the best use of Online Access. It is particularly important that they know how to keep their access secure so that they can protect their privacy, interpret the clinical data in their GP record. Practices are best placed to promote their online access and provide patients with the information they need.

This guidance will help you create a communication plan to inform patients about Patient Online and use it safely and effectively to support their health care. The information may be communicated through leaflets, posters, waiting room information screens, the practice website or with the help of your patient participation group or local agencies such as community pharmacies, libraries, post offices and voluntary agencies.

Promoting online access
- Reasons why the practice may want to promote online access
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Since 31 March 2016 English practices have been contractually required to promote and offer online access to "all information from the patient's medical record which is held in coded form" as well as the usual transactional services. The requirement has not changed since then. By June 2018 almost 6% of patients in England had online record access.

Promoting Online patient

Patients need to be well informed to make the best use of patients' online access. It is particularly important that they know how to keep their access secure so that they can protect their privacy, how to use the practice appointment and prescribing services, and to interpret the clinical data in their GP record. Using online access has benefits for the practice as well. It follows that practices are best

placed to promote their online access and provide patients with the information they need.
- Online access can bring benefits to the practice which more than make up for the effort of promoting online access successfully.
- Online appointment and prescription services reduce reception time spent on providing these services.
- Online appointment and prescription services are more accurate and less prone to misunderstandings and mistakes than verbal communication.
- Practices control which appointments are available online.
- Online record access enables patients to be better informed about their health, it can help improve health literacy and promises better outcomes, particularly for long term conditions.
- Online access to laboratory results and hospital correspondence reduces that time required to inform patients about their results and hospital reports and it may reduce the number of consultations. It helps patients prepare for consultations and enables the discussion to focus on the most important topics to the patient and the health professional with less time spent on introducing new information. It may reduce the need for patients to telephone the practice for results or for consultations when the results are normal.
- Patients may identify errors or gaps in their record or prescription list and help the practice improve their record.
- It enables English practices meet their contractual requirement to promote and offer online access to patients.

Benefits for patients

The promotion of online access to patients is based on raising awareness that the services exist and the benefits that patients can expect from using them. Consider targeting patients who are most likely to

benefit such as those with long-term conditions or on repeat prescriptions.

- Patients like the convenience of booking and cancelling appointments, and requesting repeat prescriptions online at any time of the day, on any day of the year.
- Online patient services such as appointments and prescription requests are more accurate because the patient can see the details on the screen. As a result, they are less prone to misunderstandings and mistakes than traditional methods of communication such as visiting the practice or using the telephone.
- For some patients with sensory impairment, learning disabilities or limited mobility online access provides an accessible way of communicating with the practice.
- Record access enables patients to become more involved in their health care, to be more prepared for consultations with health professionals, better able to make informed choices about their health care.
- Patients can share access to their record with health professionals outside the practice, improving collaborative care where patients are receiving care at other health organisations.
- Improved record visibility and access can improve trust between the practice and patients.
- Carers with proxy access for the patient they are caring for can gain the same benefits.
- Patients with long-term conditions, and their carers, are especially likely to benefit from online record access.
- Patients undergoing investigations can use online access to view results and advice, removing the need to phone or visit the practice.

Digital exclusion

There is also a good introduction to Patient Online provided by Good Things Foundation through their Learn My Way website. They specialise in supporting people who are unable to use computers or the internet.

The Good Things Foundation coordinate a network of 5,000 local learning centres where patients can learn to use computers and the internet safely.

Sources of promotional materials

NHS England have produced an extensive range of promotional tools which include template articles for your website or blog, social media posts for websites such as Facebook and Twitter, and a press release for use with your local media, posters, leaflets, appointment cards and balloons and content for waiting room screens.

- You can view and download PDF versions of free patient leaflets and promotional materials about Patient Online produced by NHS England at here and order paper copies for patients by following the Orderline link on the NHS England webpage.

The NHS England Patient Online team have produced a useful leaflet for patients that will introduce them to online access. It describes what they can use it for and how to apply to the practice for access.

Suppliers of Patient Online Access systems also provide promotional materials:
- EMIS
- TPP
- INPS
- Microtest
- Evergreen

Information for patients who apply for Patient Online

It is helpful to have a standard leaflet that can be given to patients when they ask about or apply for online access and made available in the waiting room and on the practice website. NHS England have produced a series of leaflets for patients to introduce online access. These are in PDF format that is not easily edited. They will help describe online access to patients in general terms covering the registration process including identity verification, transactional services and records access, access security and advice for patients who are considering allowing someone else to access their record or appointments and prescribing record and describe how to protect the security of their online access.
- Patient information guides
- GP online services - easy read guides
- Young People's Access to GP online services

When a patient first applies for online access it is helpful to provide patients with information about the registration process, what online access offers and how patients should use it safely and responsibly. Every practice configures their online access differently. Consider producing your

own information leaflet that explains how your system works, tailored to the services the practice provides.

The rest of this guidance offers a list of pieces of information that you may wish to include in your practice information leaflets.

Registration process for online access

- A patient may register for appointment services immediately without verifying their identity. Your system may allow them to do this online.
- The patient must verify their identity before access to prescribing or medical records. Explain how the practice prefers to verify identities of applicants for online access.
- Patients may be asked to provide documents that will verify your identity. These will include one photo ID such as a driving licence or passport and another which might be a bank statement, secondary or higher education certificate, proof of age card issued under the Proof of Age Standards Scheme, or a credit card or telephone contract statement.
- Patients must verify their identity and receive their login credentials and passwords face-to-face at the surgery at the same time or arrange for the credentials to be emailed to a verified personal email address. They should not verify their identity and return later to collect the login details.
- If they already have access to prescribing and want to add record access they must confirm their identity again.
- Registering for record access may take some time because of the time it takes for the practice to check the record for harmful or third party information. They will be told how long it may take when they apply. It will vary depending on the workload of the practice and the number of applicants for record access outstanding at the time.
- The patient must complete the registration forms which includes confirming that they have read the practice information leaflet and agree to the terms of usage of online access within it.
- When registration is complete the patient will be given a letter with their login details. They should change the password as soon as they can.

How to use of online access

Appointments

- *Scope of online appointments* - Explain how the practice appointment system works and where online access fits in, particularly if patients can book telephone consultations or triage online.
- *Booking and cancelling appointments* - Give clear advice about how to book and cancel appointments. Ask patients to use their online access to cancel appointments as soon as they know that they will not be able to attend the appointment or no longer need it so that it can be made available for someone else.
- *Triage and urgent requests* - Many practices are moving on telephone triage calls for appointments. Patients need to know when an online appointment can be used instead, usually for routine review appointments. Explain with whom the patient may make an appointment
- *Limitations on booked appointments* - If the number of future appointments the patient can book is limited, explain why.
- *Continuity of care* - Encourage patients to book appointments with their usual doctor or nurse to encourage continuity of care.

Prescriptions

- *Dispensing interval* - How long it takes for a prescription to be ready to collect from the practice or community pharmacy after it has been dispensed.
- *Electronic prescribing service* - Ask the patient to sign up to the electronic prescription service (EPS) and nominate a pharmacy.
- *Early or frequent requests* - Some online access systems allow patients to request repeat prescriptions before they are due or request prescriptions that are not on their repeat prescription list. Patients should be advised that they will be asked to explain why they are ordering a new prescription earlier than expected and that the online access should not be used to request a new prescription without a consultation.

Record access

- *Privacy risk* - It must be made clear to patients that once they have access, the privacy of that information in Patient Online is their responsibility. If they choose to share their login credentials or the information with other people, they do so at their own risk. Patients should be encouraged to inform the practice if anyone puts them under pressure to share

access to their record.

- *Data security* - Patients should know how to protect the computer screen while accessing their GP services and understand the need to log off from the browser when they have finished. They should know what to do if they lose their password or suspect that someone has access to it without their consent. They should change their password immediately. If they can't do this for some reason, then the patient should contact the practice so that staff can remove online access until the patient is able to reset their password. Staff members therefore need to know how to manage password resets for patients and how and when to remove online access to safeguard patient confidentiality.

- *Level of record access* – This may vary from the detailed coded record to include consultation notes and scanned documents. It may be a standard choice by the practice for all patients or may be set according to the needs and wishes of individual patients.

- *Detailed coded record* – The detailed coded record represents the headlines of the data in their record. It includes information about illnesses and diagnoses, operations, physical examination, lifestyle, screening tests, medication, allergies and adverse drug reactions, vaccinations and immunisations, laboratory and radiology test results and other major investigations.

- *Person-centred care* - Patients can use record access to understand and manage their own health, in particular they can check information that will help them prepare for consultations. Access to test results and hospital reports before consultations can be very useful.

- *Health literacy* - Full use of record access requires an adequate level of health literacy focused on the patient's health problems. Medical records are technical documents that use medical terminology such as diagnoses and laboratory tests that the patient may not recognise or understand. There are several good websites that provide clear and unbiased information about terms that the patient may come across in the record. Patients should remember that the explanations are not personalised to their circumstances and it may be helpful to discuss anything that they are not sure of with their nurse or doctor.

- *Redaction* - Some data may be redacted or hidden from online access by the practice if it is thought to be in the patient's best interests

or is confidential information about a third party. Records should be checked for harmful or confidential third-party data should be redacted before record access is switched on and as it is added to the record in future.

- *Approachable practice* - Ensure that patients feel confident to report any questions they have about their record content. There may be things they do not understand in the record, omissions, mistakes, or something that they find upsetting or with which they disagree. Their comments should be discussed openly and honestly, and changes made to the record if appropriate. The practice is under no obligation to change the record unless you think that the change is correct. If you refuse to make a change at the request of a patient, it is reasonable to add a note that the patient asked for the entry to be changed or added. There is more information about the right of patients under the General Data Protection Regulation 2018 to have personal data rectified on the ICO website.

- *Confidential third-party information* - If the patient sees confidential information about a third party in the record they should log out of Patient Online immediately and inform the practice as soon as possible. The practice will need to investigate swiftly and thoroughly and will need to consider whether the error is isolated or whether it could have occurred in more than one record. In such situations practices will need to follow the Information Commissioner's guidelines and also to seek specialist advice, such as from the GMC or their medical defence organisations. Having identified the source and extent of the problem, the Information Commissioner's guidelines and the GPs' professional duty of candour require the practice to inform the patient(s) affected, apologise and provide a full explanation of what has happened and what steps will be taken to resolve the problem. There is more information about how to report a breach of personal data to the Information Commissioner on the ICO website.

- *Sharing with health professionals* - Depending on system functionality, patients may be able to use their phone or tablet to show elements of their record to other health professionals outside the practice or give specific health professionals 24-hour access to their GP record.

- *Legal, insurance, financial and employment reports* - Patients should be advised not to use paper

printouts or direct copies of the information that is displayed in Patient Online in place of legal, insurance, insurance, financial or employment reports or applications.

- *Personal health record* - Some Patient Online systems also have functionality that allows patients to record their own health data and view it alongside the GP record. Some also allow the data to be copied into the GP record.

Access delegated to a proxy

- Online systems may allow proxy access where a third party, who may or may not be registered with the practice, to be given login details to have online access to the patients' transactional services and/or record. This can be very useful in certain circumstances.
- If the patient chooses to share access to their online GP account with someone else (their proxy), there are advantages for the patient if the practice gives the proxy their own login credentials including a separate password.
- The GP record may contain very sensitive information that they wish to keep private. Even the prescribing record may reveal confidential information about them. The patient should check through their entire online record to ensure that there is nothing there that they would not want their proxy to see. Patients must have complete trust in anyone who they allow to have access to their online account. If they are in any doubt they should not share, or they should ask the practice to redact any sensitive data where it is possible.
- The practice will also be able to ensure that the proxy has all the information about how make good use of online access, including how to keep it secure, the implications of data quality and for parents, the practice policy about parental responsibility and the competence of young people to make their own decisions about who can access their record.
- There are many circumstances where this can be helpful. It may be convenient for someone else to book appointments or request prescriptions for them. It may help a carer understand and help to manage their health.
- Online access for the proxy should not be configured to allow greater access than is necessary to carry out the actions, such as booking appointments or requesting prescriptions, that the patient wishes their proxy to perform. Depending on the patient's needs, online access may be configured

to allow a proxy to do one or more of the following:
- Book and cancel appointments
- Order repeat prescriptions
- Access the detailed coded GP record
- Access the full GP record
- The practice may have a policy defining which people may apply for proxy access such as close family members, carers, parents or nursing home staff.
- If the patient has employed a carer and wants to remove their access when they no longer employ them, proxy access can be easily withdrawn. The patient may also limit the online access to just booking appointments or requesting prescriptions, even if the patient has full record access. There may also be an audit trail accessible to the practice or the patient of who has accessed the patient's record if the GP system has this functionality.
- It is safer to restrict proxy access to specific individuals, rather than a group or organisation. If an individual with their own login details leaves the organisation their access can be switched off without interfering with others' access and the audit trail should always be clear about who has had access to the patient's records. If an organisation has a single set of login details, neither the practice nor the patient have good control over who can access the patient's record.
- Some patients lack the capacity to choose or consent to a third person acting as their proxy, but the practice may agree to a carer having proxy access in the absence of informed consent by the patient if it is clearly in the patients best interest. An example is a close family member with Power of Attorney for Health and Welfare or a guardianship.

NHS England has produced a set of patient guides relating to proxy access and carers.
- [GP online services for carers including young carers](#)
- [Giving another person online access to your GP services](#)
- [Giving employed carers access to your GP online services](#)

Safe and responsible use of online access
Maintain the security of the online access
The security of online access to GP practice services and records is very important and it is the patient's responsibility to maintain it. To achieve

this they must do the following:

- Protect their login details so that nobody else can gain access to their record.
- Passwords should be easy to remember or stored in a safe place, such as an encrypted password app. They should not be based on something that is easy to guess.
- If they lose the details or suspect that someone else has seen them, they should change their password immediately and inform the practice.
- Use a password, PIN or fingerprint or face recognition system to protect access to a private computer, tablet or smartphone that they use to access their online access.
- Log out of their browser when they have finished using online access, especially if they have used a public computer.
- Ensure that nobody can see their record on the screen over their shoulder while they are accessing their GP online account.
- Take precautions to avoid cyberattack, using antivirus software, an effective firewall and safe internet browsing whenever possible.
- They must keep and dispose of all information that they download or print from their record securely.
- People with visual impairment, who use audio electronic readers need to be careful to avoid being overheard, especially in public places.
- There is more information about this in *Keeping Your Health and Social Care Records Safe and Secure* from the British Computer Society and Department of Health (2013) and *Protecting your online GP records* from NHS England (2016).

Appointments and prescribing services

- There may be a practice limit on how many future appointments a patient may hold at one time.
- Encourage patients to book appointments with their usual doctor or practice nurse.
- Patients should use the online system to cancel an appointment as soon as they know they will not use it.
- They should use the messaging service to explain early requests for repeat prescriptions or requests for medication not on their repeat list.

Data Quality

- The information in the patient's record may contain items that the patient does not understand, thinks are mistaken or that may upset them.

- The patient's record may contain things that the patient is not expecting. There are several reasons why this may happen. This patient should inform the practice if they any information in their record that they think is wrong or find upsetting.
- This may happen if the patient has forgotten the event in their record, if there is an error in the record, if they fail to recognise a medical term that is synonymous with a lay term that they know (e.g. acute myocardial infarction instead of heart attack), if they disagree with a diagnosis or if incorrect information has been added to the record by the practice, or a patient's previous practice and has persisted through GP2GP record transfer.
- The record may also contain confidential third party information that has not been spotted and redacted in the check carried out before the patient registered.
- If any of these situations arise, the patient should let the practice know about it. The practice will be keen to listen and discuss the matter with them as soon it is possible to arrange an appointment. The practice may explain the information, redact or remove the data; however, patients cannot demand that an item they disagree with is removed from the record.
- If the patient has been able to see confidential information about another person, the practice will inform the other person as soon as possible.

Safeguarding

- Patients may be coerced unwillingly into allowing other people to have access to their online records. Even when they have shared their login details willingly or arranged for formal proxy access where the other person has their own personal log in details, online access may be misused or abused.
- If the practice suspects that the patient has been coerced to allow another person to access their online record against their wishes, it is best refuse to allow proxy access until the suspicion has been clarified.
- If a patient is worried that this might happen in the future or has experienced coercion, a failure to respect their privacy or misuse of the system, they should discuss it with the practice immediately. The practice may switch off access until the matter is resolved if that is a safe option. The practice may redact data if there is something that the patient is keen to keep private.

- It is much better for a third person to have their own account and login details. Proxy access can be switched off without the patient losing their online access.
- Proxy access may be limited to specific services if the patient wishes.
- The proxy should be fully informed about how to use the service responsibly.
- The patient and the proxy must verify their identity to the practice and complete a consent form before the proxy is given login details. There is a consent form template in the Patient Online toolkit that you can use.

There is more information about proxy access and safeguarding in the guidance on Coercion, Proxy Access, Children and Young People, and Safe Patient Online Record Access the toolkit.

Accessible Information

Since 2016, GPs have been required to comply with the Accessible Information Standard which requires health and social care organisations.

NHS England aims to improve the provision of accessible information and communication support to patients, service users, carers and parents with a disability, impairment or sensory loss. This includes those with learning disabilities, those who are blind or with a visual loss, deaf, significant hearing impairment or deafblind. This list however could be much broader and include those affected by stroke for example.

As set out in the Health and Social Care Act 2012, compliance with information standards is mandatory upon NHS and adult social care bodies, and providers of NHS and adult social care. Practices have to comply with the AIS by July 2016.

There is more information about the Accessible Information Standard in a BJGP editorial and on the BMA website.

Patient Online is very useful for patients who need accessible information. It can reduce the need to telephone or visit the practice and talk to a receptionist.

Digital information is accessible to visually impaired who may be able to display or print large font versions of the information or use a screen reader that are readily available on computers and smartphones. Using headphones or earbuds

patients can access the information without asking someone to read it to them, helping to maintain the privacy of their health information.

The Royal National Institute for the Blind have published a video of Hugh Huddy presenting to GPs on the value of digital information for patients who are visually impaired.

Downloaded patient information leaflets can be run through translation software for people who prefer information in another language so consider putting all patient information leaflets on the practice website.

NHS England has published patient information leaflets about Patient Online that you can download and put onto your website. There are easy read versions of the same information on the same webpage.

Advising patients with Patient Online record access to check that their communication needs are recorded, if they have particular preferences in how they receive information from the practice. The first step in meeting patients' accessible information needs is to find out and record what they need. A patient with record access is able to check and ask for their disability and preferred means of receiving information is recorded.