Patient Online Support and Resources Guide





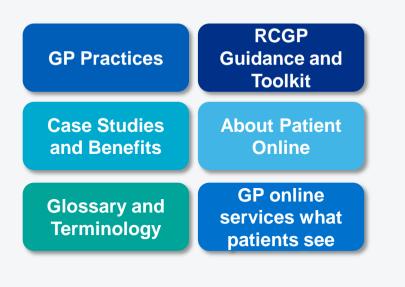


User information

Coloured boxes

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Each colour is a topic. Selecting these boxes moves you to different sections in the Support and Resources guide.



HOME

FAQ

Dark grey boxes

These are hyperlinks to webpages and email addresses which are external to the Support and Resources Guide. You will need to be connected to the internet for these to work.



Depending on your internet connection speed, these links could take several moments to open.

Contact

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Light grey boxes

Order

materials

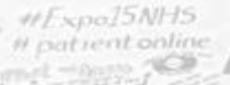
INDEX

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These are navigation boxes and move you about the Support and Resources guide.



GP practices



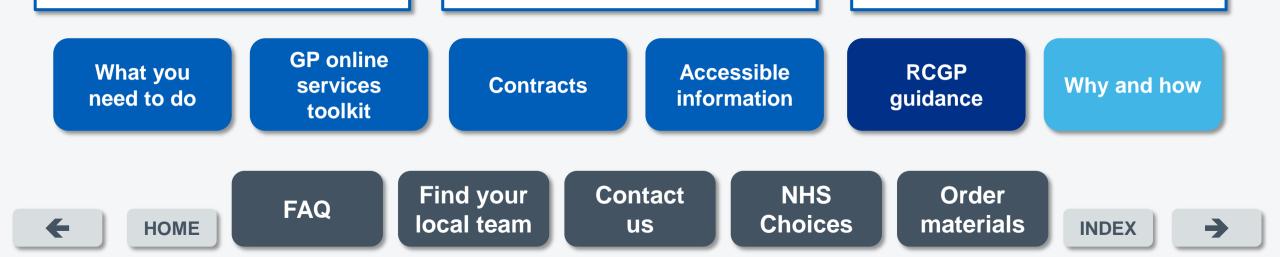






Practice managers

This part of the guide is primarily intended for practice managers although other practice staff, clinical commissioning groups (CCGs) and commissioning support units (CSUs) who are providing support to GP practices implementing Patient Online may also find it useful. GP practices are leading the way in the NHS's ambition to embrace technology as part of its drive to offer modern, convenient and responsive services to patients, their families and carers. Patient Online is NHS England's programme designed to support GP practices to offer and promote online services to patients.



What you need to do 1

Continued

As a practice manager you would need to:

- O ensure that policies and procedures are in place and that staff are completely familiar with these and understand what they need to do to register patients who request access to online services
- O include the roles and responsibilities of staff in policy documents
- O agree policy review dates to ensure that the policies/protocols remain aligned with any revisions to regulations and/or other changes in local practice
- O make all staff aware of any version upgrades or changes in policy or processes and how these might affect what they are doing

Making the most of online appointments and repeat prescriptions

Practice

manager

GP practices

Offering patients access to detailed online records

Registering patients for GP online services

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What you need to do 2

As a practice manager you would need to:

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- O include policies in new staff induction packs
- O arrange training for all staff on the registration process, including registering patients who may wish to nominate someone for proxy access
- O appoint a Patient Online champion or super-user within the practice (e.g. a patient participation group member, member of staff or volunteer to help patients register for online services when they visit the practice.
- include patient information leaflets and online registration forms in new patient packs and invite patients to complete the registration for online services at their first visit

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Making the most of online appointments and repeat prescriptions

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Practice GP manager practices

Identity checking



Vouching

Vouching with confirmation

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There are three approved methods for checking a patient's identity. It is likely that a practice will need to use all three, but may have a preferred method for most patients.

Further information and guidance has been produced by the RCGP – click on the image to go to the webpage.





What is identity verification?

Most general practice services rely on varying levels and methods of identity verification. But access to online services demands a more consistent and robust approach to ensure patient confidentiality while providing them with secure access to personal and sensitive data.

Patients may book an initial appointment online as soon as they have completed a simple online registration process. However, a more secure identity verification process is required before full access to appointment, repeat prescription ordering or record access services may be enabled for a patient.

Every practice is required to verify patient identity documentation, or individually vouch for each patient requesting access to online services. These processes need to be simple, quick, patient-friendly and not overly demanding for the practice. Please see NHS England guide Patient Online Services in Primary Care I (God Practice Guidance on Identity Verification, and Inks below for an overview of the process within the guidance and material.

See below for guidance on how to verify the identity of patients, a checklist and examples of documentation for practices.

Identity verification - guidance for general practice

Identity verification - guidance for general practice (PDF)

Identity verification - supporting material:

- · Identity verification Getting ready checklist | step-by-step guide: Word | PDF
- Identity verification Example practice protocol: Word | PDF
- Example registration form: Word | PDF
 NHS England patient information leaflets
- dentity Verification' eLearning available here (free registration/ login required)

←

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Just as with DBS checks, two forms of documentation must be

- provided as evidence of identity and one of these must contain a photo
- Acceptable documents include passports, photo driving licences and bank statements, but not bills

ID documents

 Most patients are able to prove their identities using documentation RCGP identity verification

Practice

manager

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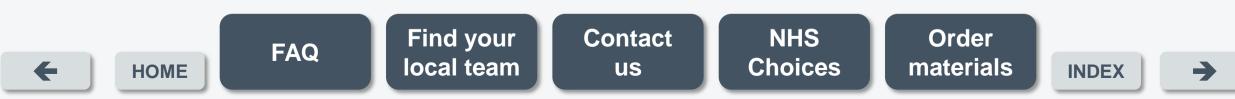
Identity

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Vouching

←

- Vouching for a patient's identity requires an authorised member of staff who knows the patient well enough to verify that they are who they say they are, and that no deception is taking place
- Consideration should be given to how long each patient has been registered with the practice as well as how many times the staff member has met them
- Vouching might therefore be appropriate for patients who have been registered for a short period involving frequent appointments, and also for patients registered for a long time but seen less frequently

RCGP identity verification guidance

ID documents

Vouching with confirmation

Vouching with confirmation

- In a situation where the applicant is not known sufficiently well by an authorised member of staff to vouch for them on this basis, their identity may still be verified by obtaining responses to questions from information held in the medical records
- This should take place discreetly and ideally in the context of a planned appointment. It is extremely important that the questions posed do not incidentally disclose confidential information to the applicant before their identity is verified

RCGP identity verification guidance

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GP online services promotional toolkit

The aim of this toolkit is to help you to:

- promote GP online services to the public
- increase patient awareness so that they are able to use GP online services

This toolkit will support you to raise awareness, providing template articles for your practice website or blog, social media posts for websites such as Facebook and Twitter, and a press release for use with your local media.



GP

practices

GP online

toolkit

CCG, CSU,

NHS Trusts

toolkit

PPG toolkit

Practice manager

Other toolkits are available for CCGs, CSUs and NHS trusts and Patient Participation Groups (PPGs)

Contracts

GMS contract, **PMS** and **APMS** agreements 2015/16 required GP practices to offer and promote online appointment booking, online ordering of repeat prescriptions and online access to the detailed information in patients' medical records held in coded form. This requirement continues to apply in 2016/17 and in future.

In 2016/17 has also reached an agreement with the British Medical Association (BMA) to work toward a joint ambition of getting at **least 10% of patients in each practice signed up** for online services. In addition, this year's contract (2016/17), requires practices to provide patients with online access to clinical correspondence such as discharge summaries, outpatient appointment letters, and referral letters unless specific requirements of the Data Protection Act 1998 apply to restrict this. Patients should be enabled to have dialogue with the practice as the primary route to discuss such correspondence. (Practices have the facility to make available online only those letters received from a chosen prospective date which will be no later than March 2017.)

BMA

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GP practices

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Practice

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Practice reception team

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You are the first point of contact for patients so it is helpful for you to confidently offer the

promotional material and information supporting Patient Online services.

RECEPTION

←

HOME

You can download materials and templates designed to help practices promote their online services to patients. You can add your own local information to these to suit your practice.

FAQ

Patients they will know this service as <u>GP online services</u> rather than Patient Online.

Click on a tile and you will be taken to the YouTube clip of reception teams experiences of Patient Online.

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Posters and promotion



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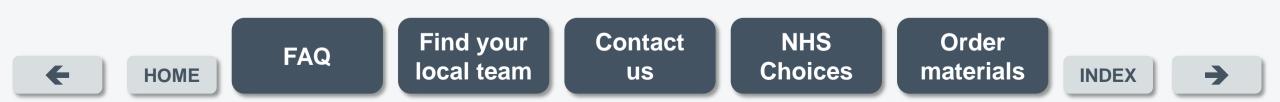
Reception

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Information for patients







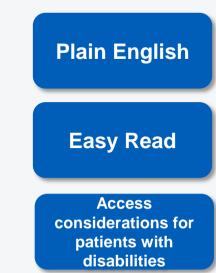
Patient leaflets

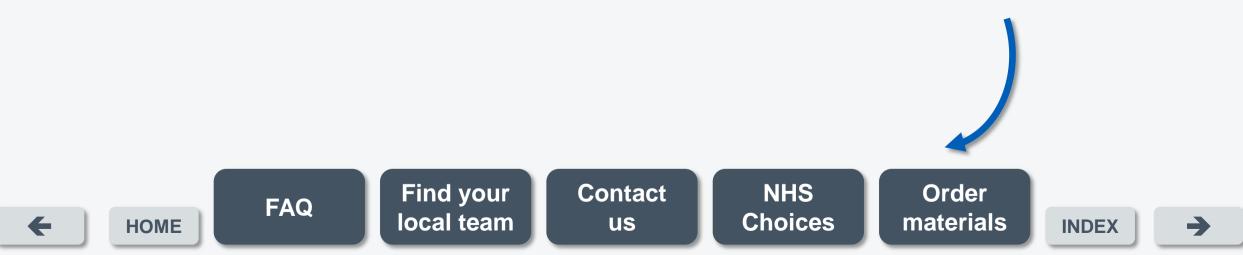
The Patient Online team has designed a series of leaflets to explain about GP online services for patients. There are three types of leaflets available

- Plain English
- Easy read
- Access needs

Materials and templates can be

- Downloaded and you can add your own local information to these to suit your practice
- Viewed by patients on the NHS Choices website
- Ordered from the NHS orderline





Patient GP info practices

Plain English leaflets



Plain English gets its meaning across clearly and concisely to its intended audience.

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The Plain English Campaign

Plain English is writing in a clear and friendly way, keeping the information

- Clear
- Concise
- Jargon-free

Plain English helps you to communicate effectively.

We have produced a series of patient guides in Plain English which explain about GP online services. You can share them with your patients via your website or order paper copies from the NHS orderline. Patient
infoGP
practicesPatient
leafletsAccessible
info



Document: Accessible communication formats

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Easy read leaflets

Wouldn't it be great if you could look at your GP records online? Well, you can! You can also book and cancel appointments at your GP surgery. You can also order repeat prescriptions online.

What you need to know

—

You can already see some of the information in your GP online records, including your medications and allergies.

FAQ

The easy read format was created to help people with learning disabilities understand information easily. Easy read uses simple, straight-forward language and pictures to support the meaning of text.

As well as supporting people with learning disabilities to access information independently, it can be used by a carer to talk through information with someone with learning difficulties so that they can understand it, for example making a decision about using Patient Online services.

Easy read is often also preferred by readers without learning disabilities, as it gives the essential information on a topic without a lot of background information. It can be especially helpful for people who are not fluent in English.

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us

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Adapted from Section 5, Accessible Communications Formats Department of Work and Pensions and Department of Disability Issues

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Plain

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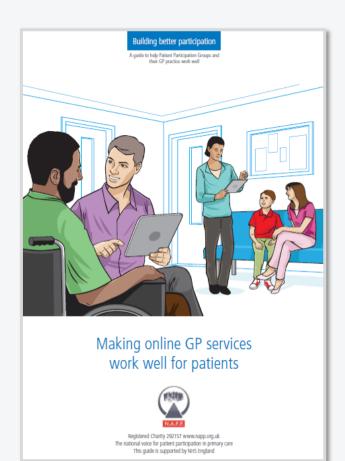
Document: Accessible communication formats



PPG toolkit by NAPP

Find your

local team



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FAQ

NAPP is the National Association of Patient Participation.

Their aim is to see an effective Patient Participation Group (PPG) in every GP practice and that each group is based on the mutual interests of the primary care team and patients of the practice.

NAPP has produced this short guide to support patients and practices get the most out of GP online services.

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PPG toolkit

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practices

Patient

info

Promo

Access considerations for patients with disabilities



As with other aspects of GP services, it is essential that the information and communication needs of patients are recognised in order for them to have equitable access.

Advice and guidance has been developed with four of the leading charities who support patients with disabilities.

This highlights the specific access needs of certain groups of individuals and outlines potential solutions specifically for:

- People with sensory impairments (including visual impairments, hearing impairments and dual sensory impairments) and/or
- People with learning disabilities and/or
- People with autism spectrum disorder.

Having a disability must never mean exclusion from online services. Quite the opposite, online services can make access easier and deliver new opportunities. National Autistic Society

Action on Hearing Loss

RNIB

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GPs

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Most GP practices in England are now offering all online services to their patients. These are booking and cancelling appointments, ordering repeat prescriptions and viewing the detailed coded information in the medical record. Some practices have extended this and provide online access to the full medical record.

Feedback from practices highlights the benefits which are now being realised even from those who raised some concerns over the potential workload that online services would create. The benefits are discussed in other sections of this guide.

FAQ

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Your responsibility

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us

GPs have an important role in the provision of online services to their patients. This includes both a legal and a contractual responsibility. In legal terms the practice is a data controller as defined in the Data Protection Act 1998.

Contractually, GP practices are required to offer and promote online services to patients since this was introduced in the 2014 GMS/PMS/APMS agreements.

Decisions about granting online access to records to individual patients lie with the GP. This means that all policies and procedures that practice staff are required to comply with are approved by the appropriate clinical lead/group.

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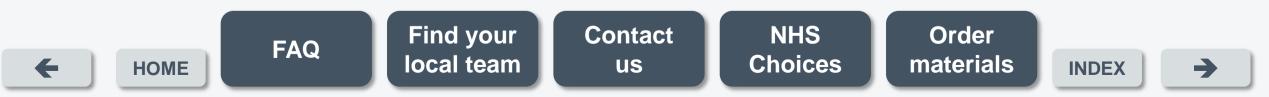
RCGP guidance

Practice nurses 1

Practice nurses and practice nursing teams are ideally placed to promote online services with patients as they have the most regular contact with patients with long term conditions. In most cases these patients could benefit the most from access to online services, as these services will support them in their self-management. You can:

- register patients for transactional services at any consultation (ordering repeat prescriptions and booking appointments online)
- at the same time assess the patients' suitability for accessing their record including test results and if appropriate
- suggest patients sign up for online test results, (describing the benefit to them after blood test for instance)

- explain that access to previous test results will help them monitor and self-manage their condition
- sign post patients to validated information about their condition to support self-management
- spend a short period of time elaborating on the benefits, i.e. record their own health data and live more independently and safely in their own homes



GP practices

Practice nurses 2

Registration of long term condition patients

- If the patient is known to you and you can evidence that, you can use the 'vouch for' method of ID verification as part of the registration process for online services, particularly transactional services (i.e. online booking of appointments and online ordering of repeat prescriptions)
- We recommend that for access to records, you request that the patient to bring in their identity documents when they come to see you
- You can check those and then ask reception to print the password and pin for the patient
- Do discuss security issues with patients, following practice protocol (for example not to share their password)

Promotion to patients

- Provide information and leaflets available free to order through the NHS orderline to patients
- Refer to the benefits and case studies on this site to help patients understand how they can help themselves

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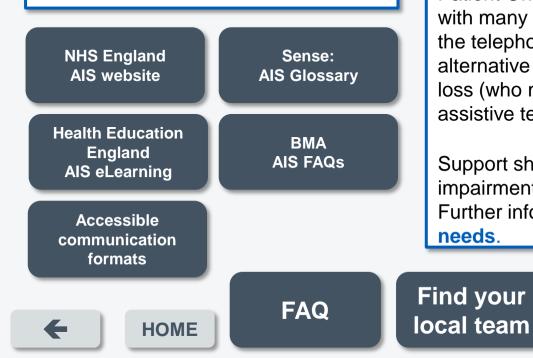
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Accessible Information Standard

Accessible Information Standard (AIS) guidance tools, support and resources are available from

- NHS England
- Sense
- Health Education England
- BMA
- The Department of Work and Pensions and Department of Disability Issues.



From 01 August 2016 onwards, all organisations that provide NHS care or adult social care are legally required to follow the **Accessible Information Standard** (AIS).

The Standard requires providers, including GP practices, to identify, record, flag, share and meet the information and communication needs of patients and carers with a disability, impairment or sensory loss.

Patient Online offers a practical, cost-effective way of communicating with many people with such needs, for example as an alternative to the telephone for people who are deaf or have hearing loss, and an alternative to printed letters for people who are blind or have visual loss (who may be able to access electronic information using assistive technology).

Support should be provided to enable people with a disability, impairment or sensory loss to access Patient Online services. Further information is in the section on **patients with additional needs**.

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Plain English

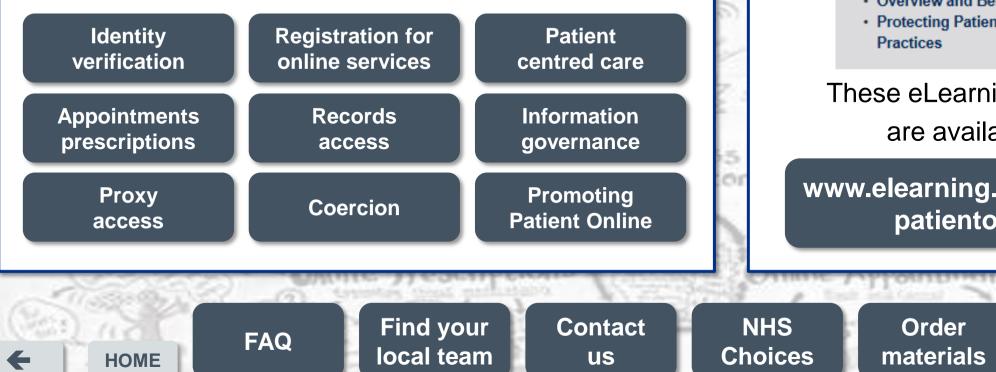
Easy read

Access considerations for patients with disabilities

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RCGP guidance and toolkit

The **Royal College of General Practitioners** guidance contains best practice advice, eLearning and downloadable resources, which you can add your local information to inform patients about your practice. Below are the nine guidance topics.





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Identity

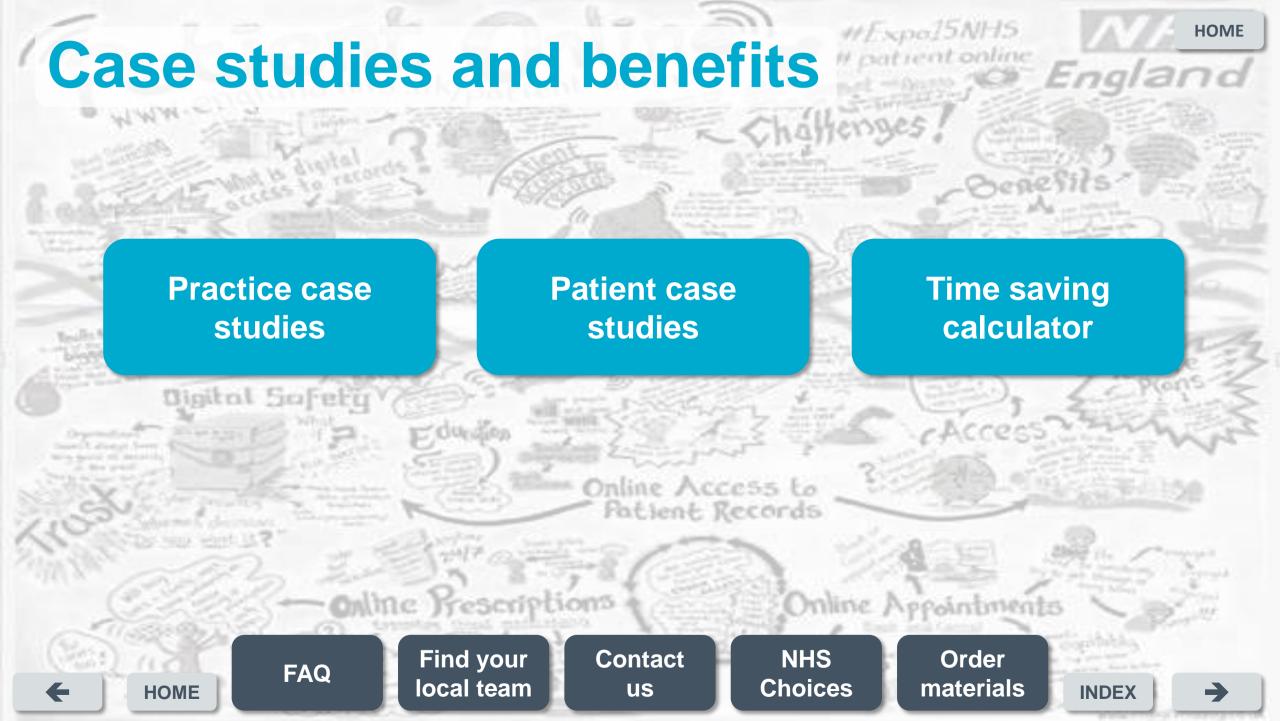
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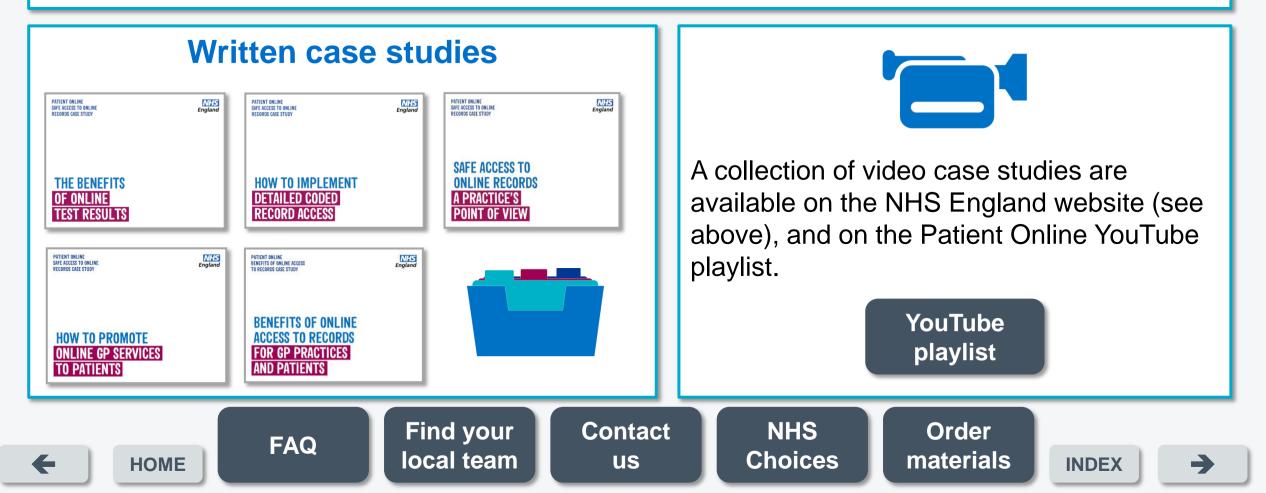
GPs

HOMF



Practice case studies

A collection of both written and video case studies are available. These detail the experiences of GPs, practice managers, reception and admin teams, and patients while using GP online services.



Benefit

Case

studies

Patient case studies

These six patients explain why they find GP online services useful.

Click on a tile and you will be taken to the YouTube clip

These can take a moment or two to open

playlist These videos are available on the

YouTube

Patient Online YouTube playlist and the NHS Choices website

Benefit

Patients

want it?

"Makes me feel like I'm in "GP online services gave "An important tool in my self-care" control" me privacy" and Learned youril yours "Great benefit for carers"

"A partnership between me

"I can find it out myself" and the doctor"

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Order materials

Time saving calculator

	Enter the average minutes taken to process in the box below	Enter the average number each day in the box below
Appointment bookings		
Appointment cancellations		
Repeat prescriptions		
Test results		

How many DAYS could Patient Online save your practice?

Appointment bookings					
	Time saved				
	hours : minutes	working days*			
Day					
Week					
Month					
Year					

	Time saved			Time s	Time saved	
	hours : minutes	working days*		hours : minutes	working days*	
Day			Day			
Neek			Week			
onth			Month			
Year			Year			

NHS England

working days*

Appointment cancellations

hours : minutes

Dav

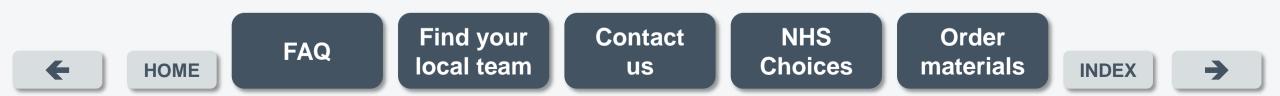
Week

Year

Time saved

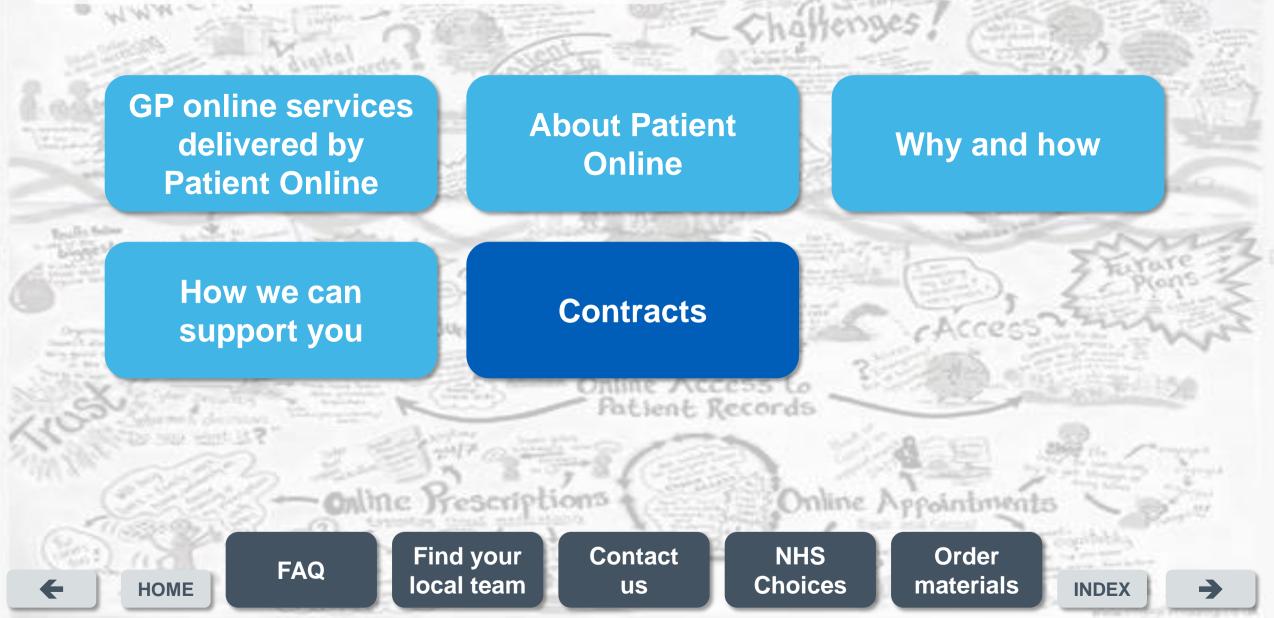
The time saving calculator is an excel spreadsheet which allows you to enter average times and numbers per day.

> Then see how much time could be released for other things over a day, week, month and year.



Time saving

calculator



About Patient Online

#Expo15NHS # patient online



GP online services delivered by Patient Online

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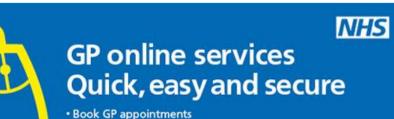
us



The programme is called Patient Online. All information for GP practices, CCGs, CSUs and NHS trusts will be labelled this way.

#PatientOnline http://www.england.nhs.uk/ourwork/pe/patient-online/ http://elearning.rcgp.org.uk/patientonline

FAQ



Reception

team

About

Book GP appointments
Order repeat prescriptions
Access your GP records

When we communicate with patients we use 'GP online services'. Our research showed that people don't think of themselves as patients, unless they are in a hospital.

#GPOnlineServices

www.nhs.uk/gponlineservices

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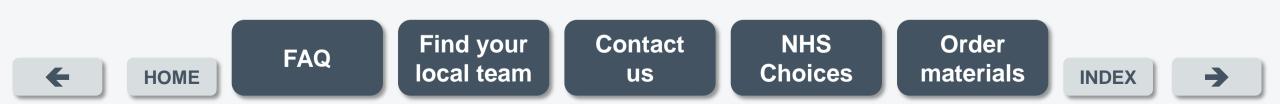
About Patient Online



ՄՄՄ	

Patient online is an NHS England programme designed to support GP practices with the provision and promotion of online services to patients, including

- access to detailed coded information in records,
- appointment booking, and
- ordering of repeat prescriptions.



Why patients want it

Why the NHS is doing it

In general practice today

Why patients want it



Patients have been telling us that they are ready and want the opportunity to take more control of their health and wellbeing.



Digital technology has the power to change the relationship between patients and their GP practice, just as it has changed relationships in other walks of life, such as managing finances or shopping.

It can make services more convenient, personal and efficient.

About Patient Online

Why the NHS is doing it

In general practice today

Patient case studies



Why the NHS is doing it

The NHS's ambition is to embrace technology as part of its drive to offer modern, convenient and responsive services to patients, their families and carers. GP practices are leading the way.



About Patient

Online

Why patients

In general practice today

Find your

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us

Today, the majority of GP practices already offer online services, including appointment booking, ordering of repeat prescriptions, and access to the detailed information in GP records. GP practices will increasingly expand online services over the few years.

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By 31 March 2017, at least 10% of patients in a practice should be able to access online GP records and be able to view detailed coded data on medication, allergies, illnesses, immunisations and test results.

These online services will be offered in addition to the traditional ways of communicating with a GP practice such as telephone and face-to-face interactions.

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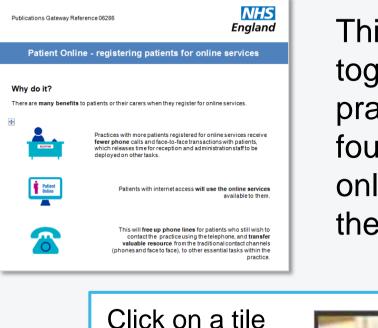
About Patient Online

Why patients want it

Why the NHS is doing it

Why and how

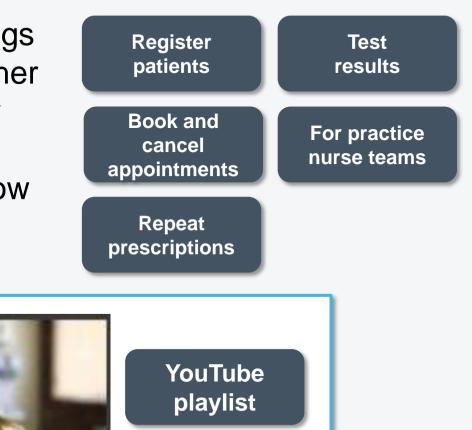




This series of fact sheets brings together experiences from other practices on the benefits they found from implementing GP online services and tips on how they achieved this.

Contact

us



Click on a tile and you will be taken to the YouTube clip

These can take a moment or two to open

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FAQ



Test results

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local team



Records access

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Order materials



How we can support you

This guide provides links to resources and guidance which have been developed to help practices successfully deliver online services to their patients.

NHS England also has an experienced support team including **implementation leads**, **digital clinical champions** (DCCs) and engagement support managers who are able to present at meetings, conferences, or other events in support of Patient Online. Implementation leads and DCCs are regionally based and are in regular contact with practices and CCGs in their area. Visits can also be arranged on request to the implementation lead in your area.

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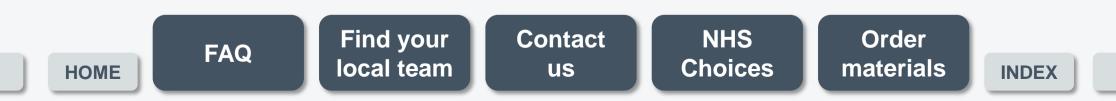
Webinars

A series of webinars focusing on topics that practices, CCGs and CSUs have asked for and include checking records, children's access and governance and clinical correspondence.

Webinars are held during the lunchtime period and are published on the NHS England website. Find your local team

Webinars

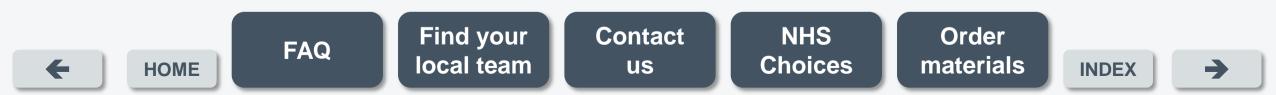




#Expol5NHS HOME **Glossary and terminology** Acronyms and **Terminology** Glossary abbreviations Digital SofeFg Access Online Access to Patient Records ine Frescriptions Appointments **Find your** NHS Contact Order FAQ local team Choices materials us 4 HOME **INDEX**

Glossary

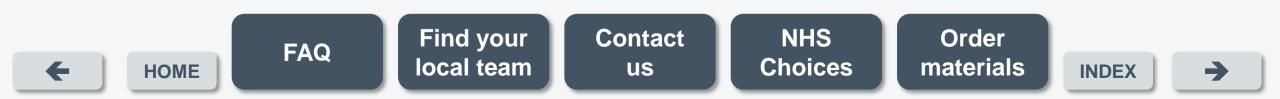
Coercion	Act of governing the actions of another by force or by threat, in order to overwhelm and compel that individual to act against their will.	
Digital clinical champion(s)	Health professionals providing clinical advice and guidance to aid national implementation of the Patient Online programme.	
Identity management (also referred to as ID Verification)	The process of checking that a patient wishing to register for online services is who they say they are.	
Implementation lead	NHS England staff with experience of change management appointed to provide support to health bodies/organisations (e.g. CCGs, CSUs) to influence national uptake of the Patient Online service.	
Summary information	Summary in patients' GP records (e.g. allergies, adverse reactions and medications) as outlined on the GMS contract.	
Proxy access	Access to a patient record, with the patient's consent, by somebody other than the patient (e.g. patient's relative)	



Terminology

Beacon Sites	GP practices experienced in offering online services to patients. NHS England is working with them to learn from their experiences and use them as exemplars for national roll-out of the Patient Online programme.
Case study (-ies)	Descriptive research using direct observations, interviews and protocols that looks at how practices and patients use online services.
Clinical system supplier(s)	IT providers (such as EMIS, INPS, Microtest, Paers, TPP) who are providing the IT systems that GP practices use and are making necessary developments to their systems to meet the needs of the patient online programme.

Glossary terms

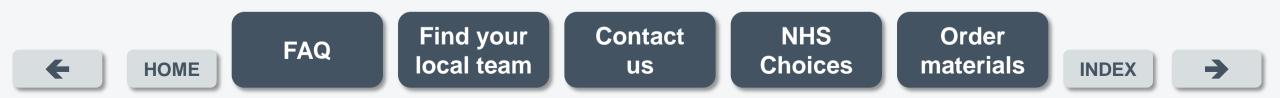


Acronyms and abbreviations

APMS	Alternative provider medical services	
CCGs	Clinical commissioning groups	
CSUs	Commissioning support units	
EPS	Electronic Prescription Service	
EMIS	GP practice IT system provider	
FAQs	Frequently asked questions	
GP	General practitioner	
GMS	General Medical Services	
GPSoC	GP Systems of Choice	
INPS	GP practice IT system provider	

I		
LMCs	Local medical committees	
Microtest	GP practice IT system provider	
NAPP	National Association of Patient Participation	
NHS	National Health Service	
PC	Personal computer	
PAERS	GP practice IT system provider	
PMS	Personal Medical Services	
PPGs	Patient participation groups	
RCGP	Royal College of General Practitioners	
ТРР	GP practice IT system provider	

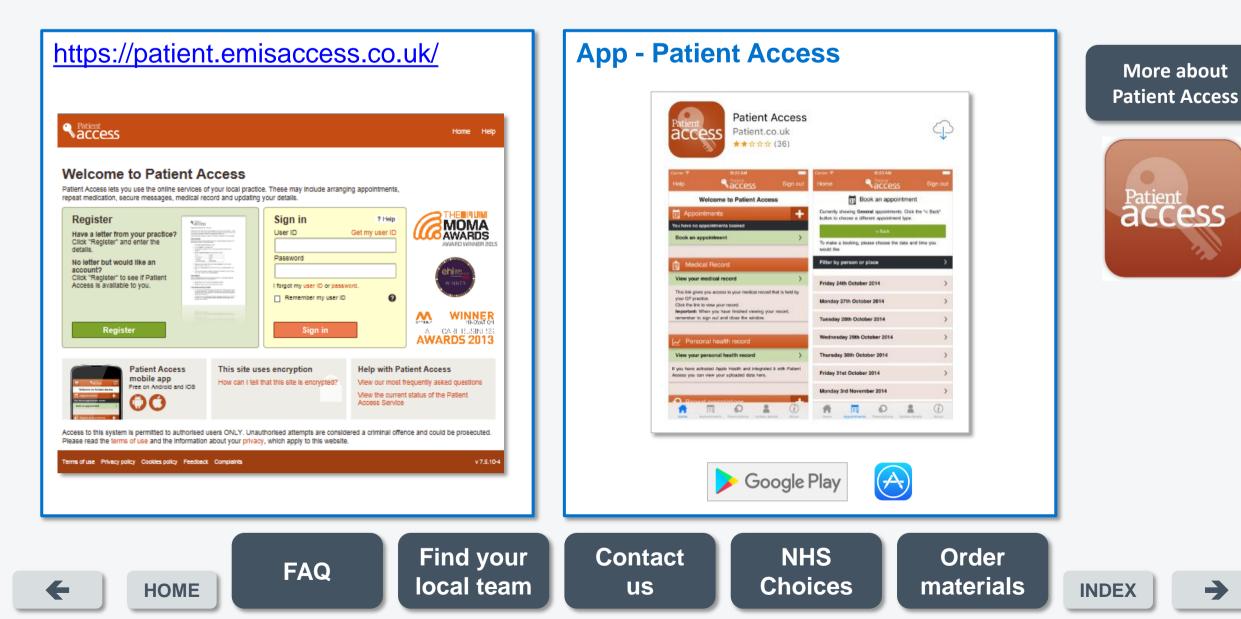
Glossary terms



HOMF GP Online Services - what patients see England Patients can access GP online services through both websites and smartphone apps. **Patient** This is to make it convenient for the patient and to let them get online and use GP online Access services in they easiest way for them. **Vision Online Apps for tablets and smartphones** Websites The Waiting Room Google Play Android **SystmOnline** svstmonline **Apple i-Patient Find your** Contact NHS Order FAQ local team Choices materials us HOME **INDEX** —

Patient screens

EMIS – Patient Access



Vision – Vision Online

https://myvisiononline.co.uk/vpp/login.jsp

	Register			
In the meantime, Click <u>here</u> to find	r the best possible serv your service will contin out more.	ice, we have started the process ue unchanged. ows you to manage your healthcare		
Sign In Already registered Practice ID: Username: Password:	I? Sign in below.	Search Forgotten username? Forgotten password?	Using this service you can Book and manage appointments Order your prescriptions View your medication history and allergies	
For help signing in a	click <u>here</u>	Sign In	,,	

More about Vision Online



→

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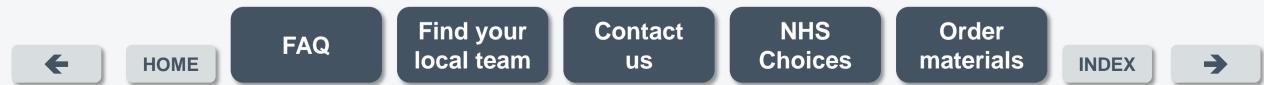
Microtest – The Waiting Room

https://thewaiting-room.net/

A Home	aiting Room	O Help -	Room 2
Welcome to The Waiting F	Log in to The Waiting Room The Waiting Room is a service that provides convenient 24 hour access to facilities previously available only by telephone or by visiting a practice. For existing users of The Waiting Room, please enter your username and password in the boxes below and click on the Login button. If you have forgotten your password, please use the Lost Password link below. Username:		he Waiting F
In order for The Waiting Room to give	you the best experience we have set our website to allow cookies. By continuing, you agree that you are happy for us to use these cook how we use these cookies on our website please click "More Information" Accept More Information	cies. To get more details on	

Patient screens

More about

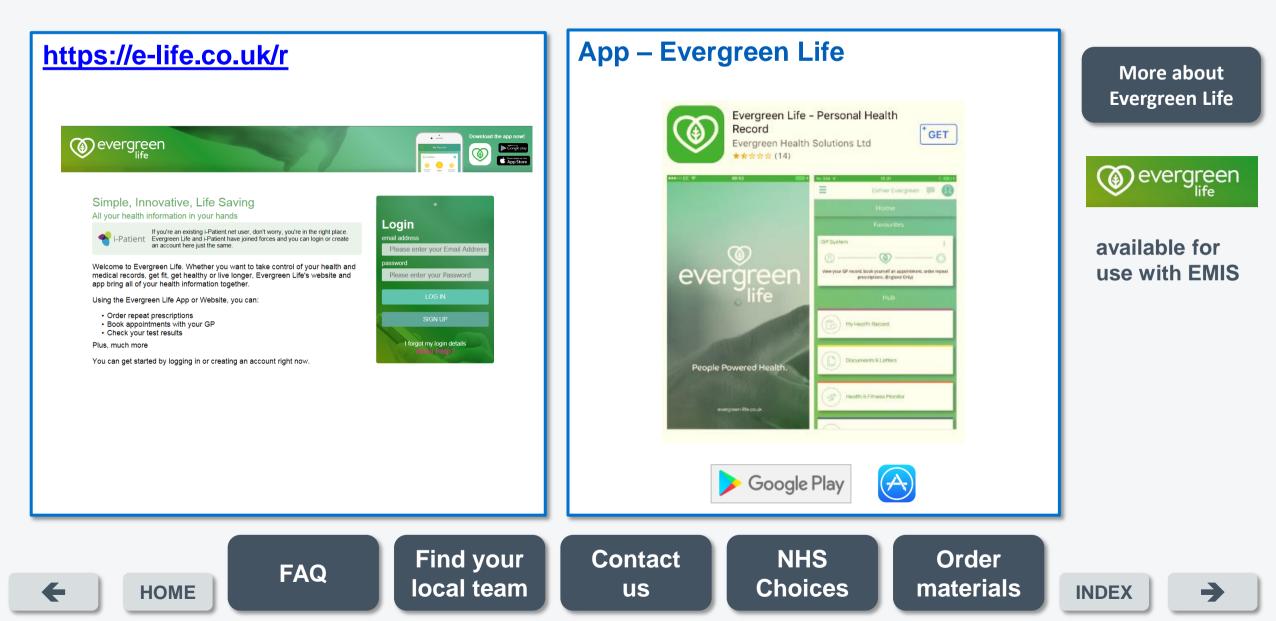


Patient screens

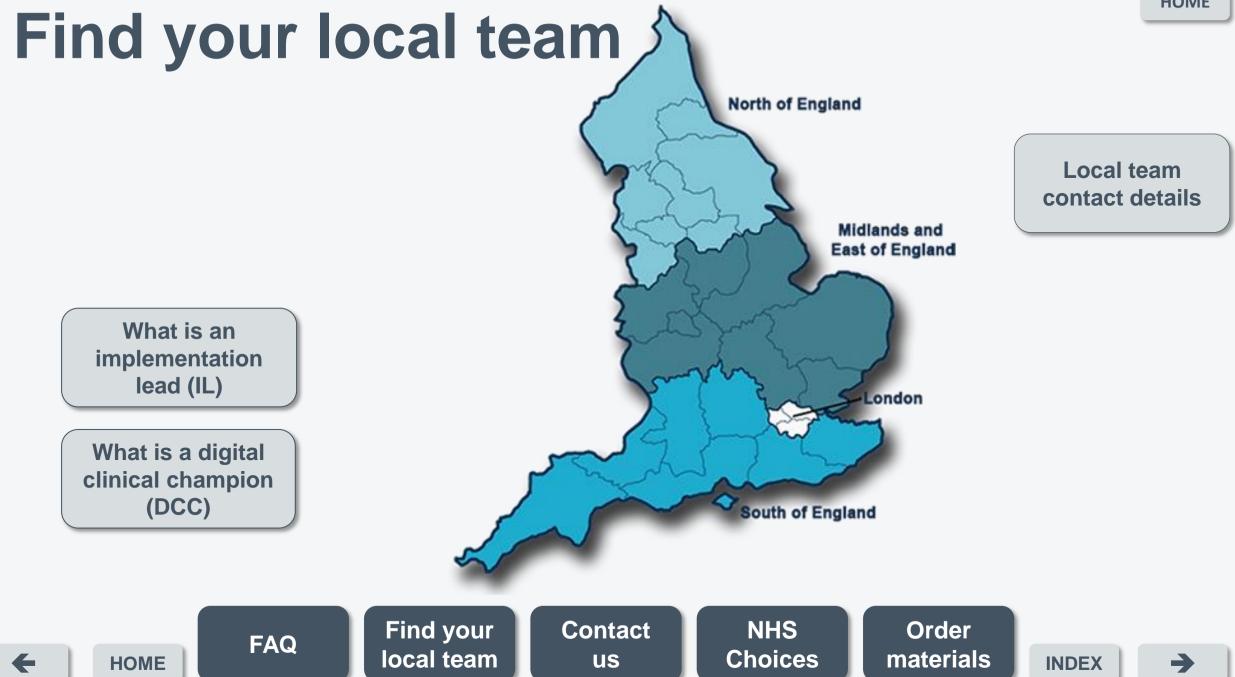
TPP - SystmOnline

https://systmonline.tpp-uk.com/	App - SystmOnline	More about
<image/> <text><form><form><form><form><form><text><text><text><text><text><text></text></text></text></text></text></text></form></form></form></form></form></text>	SystmOnline - patient health TP ******** ******** ******** ******** ******** ************************************	SystmOnline
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Evergreen Life (formerly i-Patient)



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Implementation leads

Implementation leads provide tailored information and support on a range of subjects, such as:

Local team contact details

Local team



efficient use of online appointments



business processes for patients to access their detailed coded information

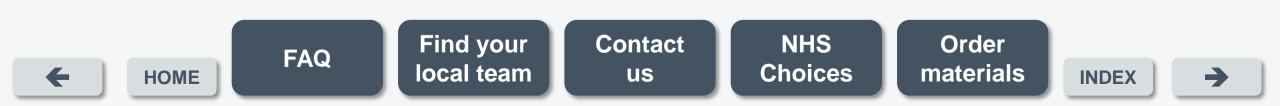


business processes for ordering repeat prescriptions online



Digital clinical champions

- Digital clinical champions (DCCs) are doctors and nurses from across the NHS who have experience of Patient Online services.
- They focus on engagement with GP practices in designated geographical areas whilst continuing to develop relationships with area teams and CCGs.



Local team contact details

Local team contacts

REGION	NAME	EMAIL	MOBILE
North	Kayleigh Buckley	kayleighbuckley@nhs.net	07710 152 881
North	Pam Jenkins	pamela.jenkins1@nhs.net	07918 336 005
North	Kay Renwick	kay.renwick@nhs.net	07768 535 904
Midlands and East	Martin Foster	martin.foster3@nhs.net	07710 152 750
Midlands and East	Alan Oliver	alan.oliver1@nhs.net	07918 335 997
Midlands and East	Tristan Stanton	tristan.stanton@nhs.net	07710 152 930
London	Jane Nicholls	jane.nicholls6@nhs.net	07710 152 891
London	Ruth Adekoya	ruth.adekoya@nhs.net	07918 368 362
London	Patrick Johnson	patrick.johnson@nhs.net	07730 376 405
South	Emma Halliday	emma.halliday1@nhs.net	07557 744 917
South	Louise Croney	louise.croney@nhs.net	07730 379 275



Contact us

HOME



Please contact us if you need support, advice or guidance with patient online.

We would like to hear from you

Choices

NHS England value your opinions and experiences. We want to ensure that your views are being heard across all parts of the healthcare system, at all levels, and are therefore committed to working and engaging with GPs, practice staff, clinical commissioning groups and commissioning support groups.

We believe that this is essential for creating and delivering better health and care services.

We are continually striving to improve Patient Online and welcome any thoughts, feedback or questions that you may have for us.

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local team

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RCGP guidance and toolkit

<u>Vision – vision online</u> <u>Vouching</u> <u>Vouching with confirmation</u>

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