NHS
England

Patient Online:
REGISTERING PATIENTS
FOR GP ONLINE SERVICES

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Equality and Health Inequalities Statement

Promoting equality and addressing health inequalities are at the heart of NHS England's values. Throughout the development of the policies and processes cited in this document, we have:

↗ Given due regard to the need to eliminate discrimination, harassment and victimisation, to advance equality of opportunity, and to foster good relations between people who share a relevant protected characteristic (as cited under the Equality Act 2010) and those who do not share it; and

↗ Given regard to the need to reduce inequalities between patients in access to, and outcomes from healthcare services and to ensure services are provided in an integrated way where this might reduce health inequalities.

Registering Patients for online services

This guide is designed to provide GP practices with practical support and guidance when patients request access to online services. It is intended as a generic guide and there may be differences in the actual process according to the GP system supplier that the practice uses. There are a range of resources already available for online services and links to these are provided within this document.

It is important that GP practices have robust policies and processes in place for registering patients to access GP online services. This helps to ensure that those patients who are requesting the services are entitled to them and that staff are aware of, and understand, their responsibilities. This is particularly important when giving patients online access to their GP records.

Most GP practices in England now offer online access for patients to view their medications, allergies and adverse reactions, along with booking appointments and ordering repeat prescriptions. Typically, registration for these services has been handled by reception staff or an appointed person within the practice administration team. Some of the processes in this guide may have already been undertaken at the time of initial registration such as when:

↗ a new patient is registered at the practice

↗ a registered patient requests online services

↗ services have been promoted by the practice

If GP practices have not already verified the identity of the patient using the methods described in **Online services: Identity Verification Guidance** then, it is a good opportunity to do this before giving access to more detailed coded information from their GP record.

Practice nurses, with their team, are ideally placed for promoting online access as they have regular contact with patients with long term conditions. These patients could benefit most from using online services and practice nurses could support the decision making process for granting access to detailed coded records. The practice nurse may be able to act as the appointed person for these groups of patients as determined by the practice and confirmed in the written policy.

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What does the GMS contract and PMS agreement say to GP practices?

The 2015/16 **GMS/PMS regulations** states that GP practices must now share detailed coded information contained within the record. As this may contain sensitive information or references to third parties, the record should be reviewed prior to the patient being given access. Further guidance on this can be found in **Patient Online: offering patients access to detailed online records.**

Getting ready – What do GP practices need to do?

Policies and processes

- ↗ Ensure that policies and processes are in place and that staff are aware of these and understand what they need to do to register patients who request access to online services.

- ↗ The roles and responsibilities of practice staff should to be included in policy documents.

- ↗ Agree policy review dates to ensure that the policies/protocols remain aligned with any revisions to regulations and/or other changes in local practice.

- ↗ Ensure all staff are made aware of any version upgrades or changes in policy or processes and how these might affect what they are doing.

- ↗ Include policies in new staff induction packs.

- ↗ Ensure that all staff receive training on the registration process, including registering patients who may wish to nominate someone for proxy access.

- ↗ Appoint a Patient Online champion or super-user within the practice (e.g. a patient participant 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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The **Royal College of General Practitioners guidance** contains downloadable resources such as registration and consent forms and patient information leaflets. These can be localised for use within GP practices.

GP system supplier

The clinical system suppliers have developed technical guides for practice staff to configure their GP system supplier for online services and how to enable these services at an individual patient level. These are available from the supplier websites.

> **EMIS**

> **INPS**

> **MICROTEST**

> **TPP**

Roles and responsibilities

Registration for online services is usually administered by reception staff or an appointed person within the practice administration team.

Reception/administration:

➡ Provide patients with the **patient information leaflet** and a **registration form**. At this stage some GP practices have also chosen to ask the patient to complete a **record access questionnaire**. The questionnaire responses help in deciding whether the patient is suitable for record access.

➡ Ask the patient to read the information leaflet prior to completing the registration form (and questionnaire if used). This is to ensure that they understand their responsibilities when using online services.

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→ The patient returns the completed registration form (and questionnaire if used) to reception with their relevant ID. If the patient does not have the required ID, vouching can be used as an alternative option or the patient can choose to complete the registration at a later date when they can provide the documents. Details of the acceptable methods of identity verification are provided in **Online services: Identity Verification Guidance**.

→ If a patient requests to view detailed coded information or their full GP record including notes and letters, staff should refer the request to the appointed person, as detailed in the practice policy, for the record to be reviewed prior to granting access. This may mean that the registration cannot be completed immediately and this would need to be explained to the patient.

→ Once all the appropriate checks have been completed, the patient can be registered on the clinical system for online access and given their username and unique password. This is usually in printed form from the GP system supplier once the registration has been entered.

Clinician or appointed person:

→ If access to detailed coded information or the full GP record is to be given to the patient, the appointed person should review the record to ensure that it is appropriate to give access. Information that should not be shared includes third party data and any codes that may be considered sensitive for the patient. Further information about reviewing the record prior to granting access can be found in **Patient Online: offering patients access to detailed online records**.

→ The appointed person confirms the outcome of the record review to the staff member managing the registration request. Where access is granted, the registration process is then completed. If access is not granted or there are concerns that require discussion, the patient will be invited to speak to the GP or authorised clinical representative.

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Other things to consider

↗ Parents and/or carers may request access to a patient's GP record. **The proxy access - guidance for general practice** advises GP practices about who can request access and the assurances that need to be in place before it is granted.

↗ If the practice requires patients to complete a questionnaire prior to registering them for online services, an appointed member of staff must check the responses. If there are any concerns about providing access from the responses given, the appointed person should contact the patient to discuss these.

↗ In order to save time for patients, some GP practices have added information about online services and how to register, with all associated documentation, to their practice website. Patients can complete any forms that are required in advance and take these to the practice along with their ID documentation.

Useful documents:

> **COERCION GUIDANCE**

> **CHILDREN AND YOUNG PEOPLE GUIDANCE**

> **INFORMATION GOVERNANCE GUIDANCE**

↗ We are currently working on additional guidance.