## **GP** online services **Support and Resources Guide**



third edition

**GP** practices

**RCGP** guidance and toolkit

Case studies and benefits

**About GP online** services

**Glossary and** terminology

**GP** online services - what patients see



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#### **User information**

#### **Coloured boxes**

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

GP Practices

RCGP
guidance and
toolkit

Case studies
and benefits

About GP
online services

GP online
services what
patients see

HOME

#### 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.

#### **Light grey boxes**

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



















#Expo15NHS **HOME GP** practices **Practice Practice Information for** managers reception team patients **Practice** Accessible **GPs** information nurses Find your NHS Order **FAQ Contact us** HOME local team Choices materials **INDEX** 

## **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 GP online services 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

GP online services is NHS England's programme designed to support GP practices to offer and promote GP online services to patients

What you need to do

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As a practice manager you need to ensure that:

- policies and procedures are in place, with agreed review dates to ensure alignment with any revisions to regulations and/or other changes in local practice
- staff are completely familiar with the policy and procedures in place and understand what they need to do, to register patients who request access to GP online services
- policy documents include the roles and responsibilities of staff
- you keep all staff up to date regarding any version upgrades or changes in policy or processes and how these might potentially impact on their practice.

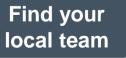
Making the most of online appointments and repeat prescriptions

Offering patients access to detailed online records

Registering patients for GP online services









#### What you need to do 2

As a practice manager you need to:

- include policies in new staff induction packs
- arrange training for all staff on the registration process, including registering patients who may wish to nominate someone for proxy access
- appoint a GP online services 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.

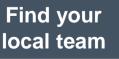
Making the most of online appointments and repeat prescriptions

Offering patients access to detailed online records

Registering patients for GP online services

















## **Identity checking**

**ID** check

Vouching

Vouching with confirmation

HOME

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.

RCGP guidance

#### Identity verification

#### 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 period access services may be pashed for a natient

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 MHS England guide Patient Online Services in Primary Care | Good Practice Guidance or Identity Verification

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)

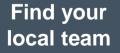
#### Identity verification - supporting material:

- 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

'Identity Verification' eLearning – available here (free registration/ login required)

















#### **ID** documents

- Most patients are able to prove their identity using documentation
- 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 utility bills.

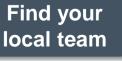
RCGP identity verification quidance

Vouching

Vouching with confirmation

















# Vouching

- Vouching for a patient's identity requires an authorised member of staff, who knows the patient, to verify that no deception is taking place and that the patient is who they claim to be
- 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, as well as for patients registered for a long time but seen less frequently.

RCGP identity verification guidance

ID documents

Vouching with confirmation



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# 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 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.

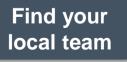
RCGP identity verification guidance

ID documents

Vouching















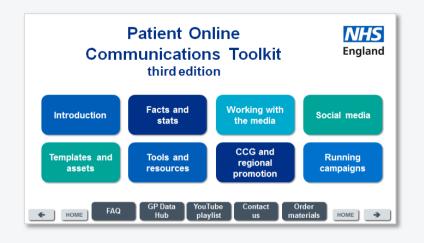


# **GP** online services **Communications Toolkit**

The aim of the Communications toolkit is to help you to effectively:

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

It includes, among other things, suggested content for your website, social media channels and newsletter. You can tailor the information, template articles and patient focused resources to make them relevant to your practice, staff and patients.



**Support and** Resource Guides

**PPG** toolkit

Other support and resource guides are available from the GP online services team. These are suitable for GP practices, CCGs, CSUs, NHS trusts an Patient Participation Groups (PPGs).



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#### Contracts

#### Patient access to GP online services

- Practices are required to offer and promote online services to patients for appointment booking, ordering of repeat prescriptions and access to information in their GP record
- To support the increased use of these services and build on the 2016/17 target of ten per cent, practices were encouraged to aim for twenty per cent of their registered patients to use one or more online services by 31 March 2018
- Practices that actively promote these services are already seeing significant benefits in time saving, safety, reduced DNA rates and improved patient satisfaction

This requirement is included in the GMS contract, PMS and APMS agreements.

**BMA** 

NHS England





#### Practice reception team



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

promotional material and information supporting GP online services.

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

Patients know the service as **GP online services** rather than Patient
Online.

Click on the tiles to hear reception staff talk about their GP online services experience in these YouTube videos.





Posters promotion

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# Posters and promotion



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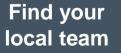
Information for patients

FREE to order from the NHS orderline









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# Information for patients

Reception team GP practices

Posters Accessible info

Patient leaflets

PPG toolkit Access considerations for patients with disabilities



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#### **Patient leaflets**

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

Plain English

HOME

- Easy read
- Access needs guides for GP staff.

#### Materials and templates can be:

- Downloaded and can be tailored with your own local information
- Viewed by patients on the NHS Choices website
- Ordered free from the NHS orderline.

**Plain English** 

**Easy Read** 

Access considerations for patients with disabilities













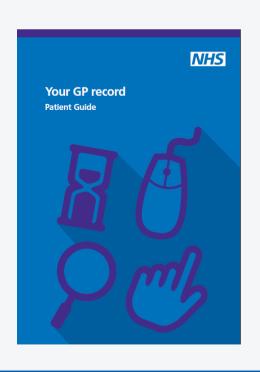




#### Our plain English leaflets

Patient GP practices

Patient Accessible info



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

HOME

The Plain English Campaign

Plain English helps you to communicate effectively, in a clear and friendly way, keeping the information

- Clear
- Concise
- Jargon-free

We have produced a series of patient guides in plain English to explain the different GP online services and how to use them.

You can share these guides with your patients on your website and by using paper copies (which are available free, from the NHS orderline).

Easy read

Access considerations for patients with disabilities

Document:
Accessible
communication
formats

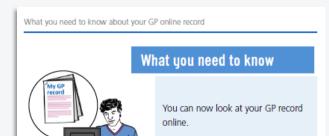




## **Easy read leaflets**

Patient GP practices

Patient Accessible info



You can see information in your GP record like your medications, allergies, test results, immunisations



You can also book and cancel appointments, and order repeat prescriptions online.

HOME

To help people with learning disabilities to understand the information easily, our easy read guides use simple, straightforward language and pictures to support the meaning of the text.

To make an informed decision about using GP online services, people with learning disabilities can access the information independently, or, talk through the information with a carer.

The easy read guides are often preferred by readers without learning disabilities too, as they give the essential information without a lot of background information. They can be especially helpful for people who are not fluent in English.

#### Plain English

Access considerations for patients with disabilities

Document:
Accessible
communication
formats



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





## PPG toolkit by NAPP

Patient info

GP practices

Promo toolkit



HOME

NAPP is the National Association of Patient Participation.

Their aim is for every GP practice to have an effective Patient Participation Group (PPG) based on the mutual interests of the primary care team and patients of the practice.

Your PPG can actively help introduce new programmes, such as GP online services, offering patient-to-patient support and sharing their own experiences.

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

**NAPP** 

**PPG** toolkit





# Access considerations for patients with disabilities

Patient GP practices

Patient Accessible info

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

The Access Needs Group recently developed four new guides to support GP staff to help patients with:

- sight loss
- hearing loss
- autism
- learning disabilities

HOME

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

Our Access Needs Guides will help you to provide practical support and advice to anyone who wants to book their appointments, order repeat prescriptions and view their GP record, online.

www.england.nhs.uk/patient-online/support/

National Autistic Society

Action on Hearing Loss

**RNIB** 

Change





#### **GPs**

Most GP practices in England now offer patients access to all of the GP online services. These are booking and cancelling appointments, ordering repeat prescriptions and viewing the detailed coded information in the medical record. Some practices have extended this, to 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 GP online services would create. The benefits are briefly discussed in a different section of this guide and in more detail in our Benefits Support and Resources Guide.

#### Your responsibility

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, GMS/PMS/APMS agreements have required GP practices to offer and promote GP online services to patients since their introduction in 2014.

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

RCGP guidance

Benefits support and resource guide





#### **Practice nurses 1**

**Continued** 

Practice nurses and practice nursing teams are ideally placed to promote GP online services with patients as they have regular contact with patients with long term conditions. Potentially, these patients could benefit the most from access to online services, using them to 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 access to their GP online record including test results and, if appropriate
- suggest patients sign up for online test results, (describing the benefit to them after blood test for example)

- explain that access to previous test results will help them monitor and self-manage their condition
- signpost 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



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Order materials



#### **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 you ask and patient requesting access to their online GP record, to bring in their identity documents when they come to see you
- Once you have checked those and are satisfied, ask reception to print a password and pin for the patient
- Remember to 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
- Help patients to understand how they can use GP online services to manage their health by using and referring to patient benefits and case studies

Why and how



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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.

NHS England AIS website

BMA AIS FAQs

Health Education England AIS eLearning

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Accessible communication formats

From 01 August 2016 onwards, 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.

GP online services 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 GP online services. Further information is in the section on **patients with additional needs**.

Information for patients

**Plain English** 

Easy read

Access considerations for patients with disabilities





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# RCGP guidance and toolkit

Identity Practice HOME manager

The Royal College of General Practitioners guidance contains best practice advice, eLearning and downloadable resources, which you can tailor with your local information to inform patients about your practice.

The nine guidance topics are:

Identity verification

Registration for online services

Patient centred care

**Appointments prescriptions** 

Records access

Information governance

Proxy access

HOME

Coercion

**Promoting Patient Online** 

 ELearning Sections (Free registration/login required) Coercion · Identity Verification Proxv Access Children & Young People Overview and Benefits · Protecting Patients and **Practices** Use the link below to access these eLearning courses www.elearning.rcgp.org.uk/ patientonline



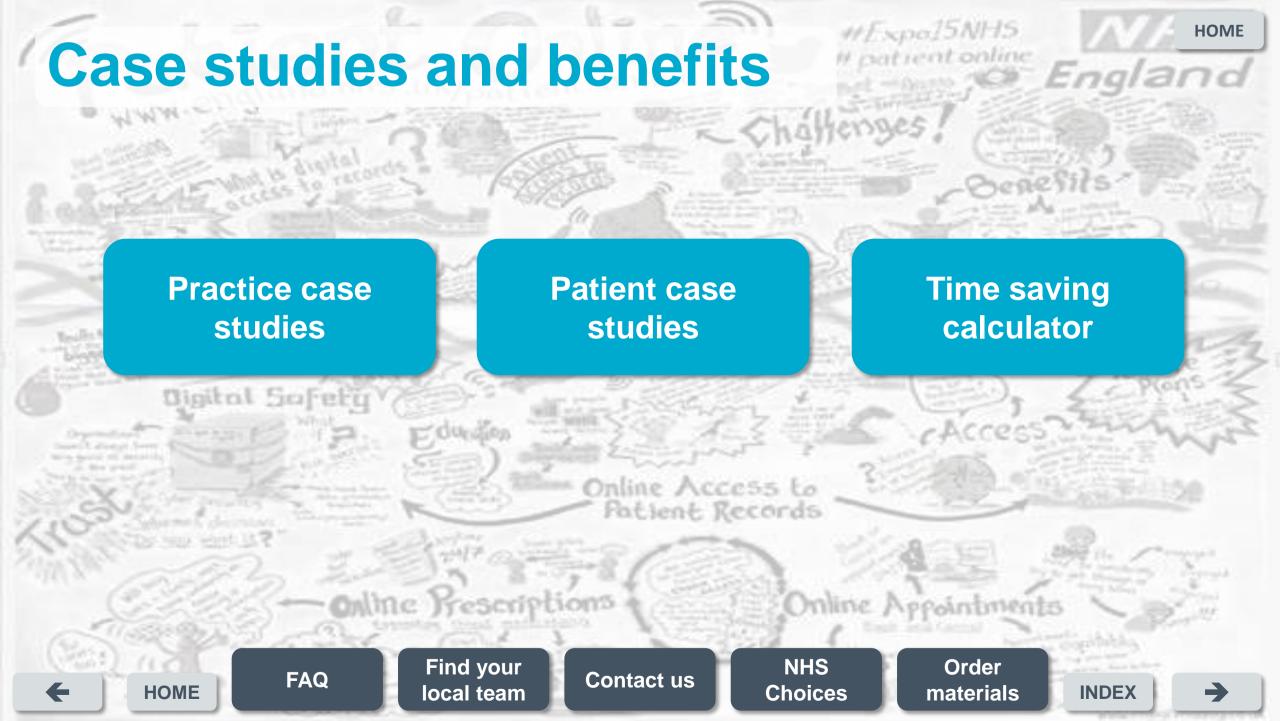
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#### Practice case studies

A collection of both written and video case studies are available below. These detail GP's, practice manager's, reception and admin team's, and patient's experiences of using GP online services.

Case studies

#### Written case studies



**HOW TO PROMOTE** 

TO PATIENTS

ONLINE GP SERVICES

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NHS



PATIENT ONLINE SAFE ACCESS TO ONLINE RECORDS CASE STUDY SAFE ACCESS TO ONLINE RECORDS A PRACTICE'S POINT OF VIEW



A collection of video case studies are available on the NHS England website (see above) and on the GP online services YouTube playlist.

YouTube playlist

Our Benefits Support and Resources Guide provides real-life examples of best practice that you can adopt to

promote GP online services to your patients, as well as case studies that highlight the benefits of the service for patients and practices.





BENEFITS OF ONLINE

ACCESS TO RECORDS

FOR GP PRACTICES

AND PATIENTS

PATIENT ONLINE RENEFITS OF ONLINE ACCESS





#### 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

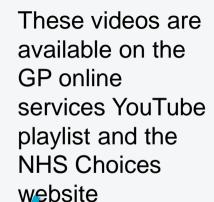
These can take a moment or two to open



















# Time saving calculator



working days\*

Enter the average average minutes taken to process each day in the box below in the box below

Appointment bookings
Appointment cancellations
Repeat prescriptions
Test results

How many *DAYS* could Patient Online save your practice?

HOME

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

Repeat prescriptions					
	Time saved				
	hours : minutes	working days*			
Day	/				
Weel	c				
Month	1				
Yea	r				

Test results			
	Time saved		
	hours : minutes	working days*	
Day			
Week			
Month			
Year			

Appointment cancellations

hours : minutes

Week

Month

Year

Time saved

Time saving calculator

The time saving calculator is an excel spreadsheet in which you enter the average time spent on a daily task and how frequently you do that task. It will then show you how much time could be released for other things over a day, week, month and year with uptake of GP online services.





<sup>\*</sup> based on a 7:30 working day



#### **About GP online services**







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GP online services 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
- booking and/or cancelling of appointments
- ordering of repeat prescriptions.

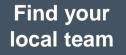
Why patients want it

Why the NHS is doing it

In general practice today

















#### Why patients want it







HOME

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 our relationships in other walks of life, such as managing finances or shopping.

It can make services more convenient, personal and efficient.

About GP online services

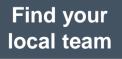
Why the NHS is doing it

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 GP** online services

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In general practice today





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## In general practice today

The vast majority of GP practices (97%) 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 next few years.



By 31 March 2018 at least 10% of patients in most practices were able to access their GP online record and view detailed coded data on medication, allergies, illnesses, immunisations and test results.

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

**About GP** online services

> Why patients want it

Why the NHS is doing it



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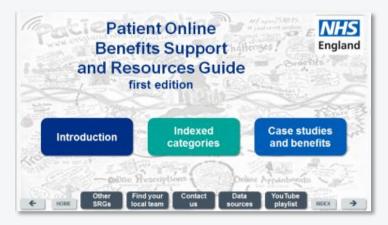


## Why and how

Reception team About

Benefit

Practice nurses



The Good Practice Support and Resources Guide brings together experiences from other practices on the benefits they found from implementing detailed coded records and best practice tips on how they achieved this.

Register patients

Test results

Book and cancel appointments

For practice nurse teams

Repeat prescriptions

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

These can take a moment or two to open

HOME



**Test results** 



**Records access** 

YouTube playlist



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## How we can support you

NHS England has an experienced support team including implementation leads, digital clinical champions (DCCs) digital nurse advisors and engagement support managers who are able to present at meetings, conferences, or other events in support of GP online services. 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.

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

#### **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

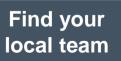
Webinars





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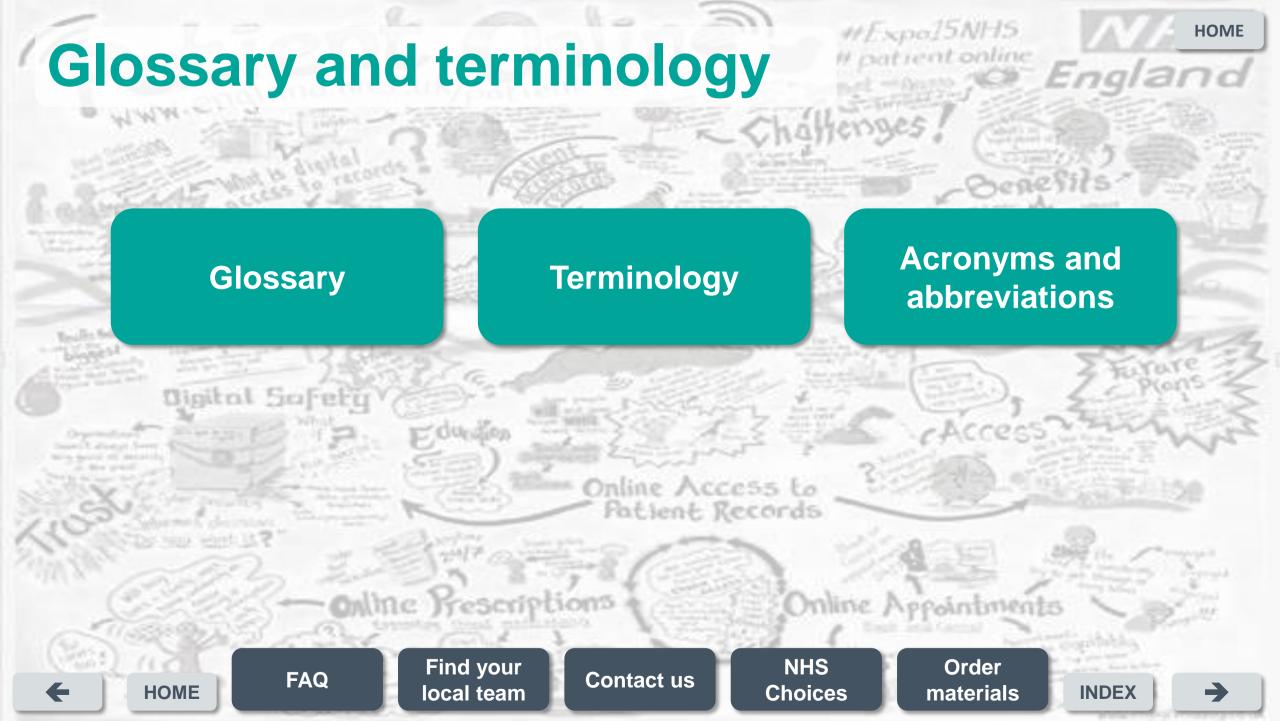


Order materials







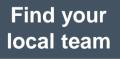


# Glossary

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)	

















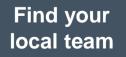
# **Terminology**

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.	



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Order materials



# **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		

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		
TPP	GP practice IT system provider		











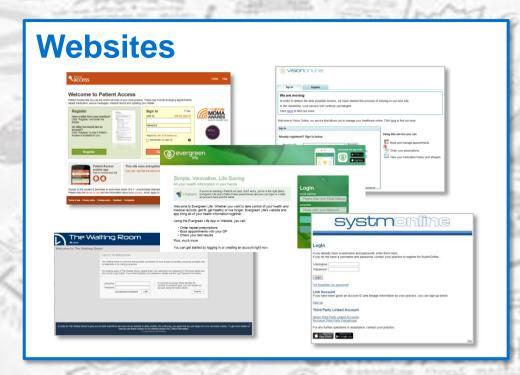




### GP Online Services - what patients see

Patients can access GP online services through both, websites and smartphone apps.

This makes it convenient for the patient, enabling them to get online and use GP online services in the way that is easiest for them.



Apps for tablets and **smartphones** 

**Android** 

**Apple** 





**Patient Access** 

**Vision Online** 

The Waiting Room

**SystmOnline** 

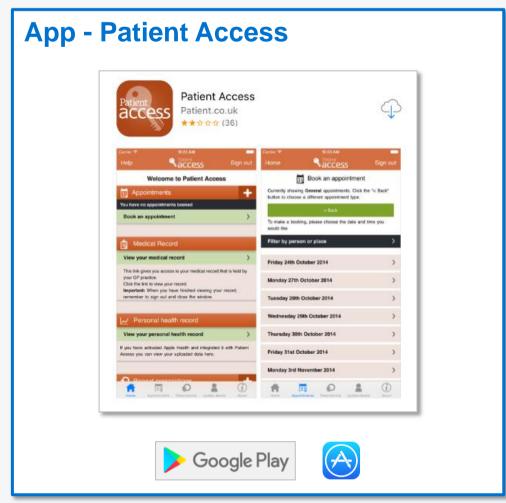
i-Patient





#### **EMIS – Patient Access**

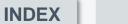




More about Patient Access







#### **Vision – Vision Online**

#### https://myvisiononline.co.uk/vpp/login.jsp VISIONONLINE Register Sign In We are moving In order to deliver the best possible service, we have started the process of moving to our new site. In the meantime, your service will continue unchanged. Click here to find out more. Welcome to Vision Online, our service that allows you to manage your healthcare online. Click here to find out more. Sian In Using this service you can Already registered? Sign in below. Book and manage appointments Practice ID: Search Order your prescriptions Username: Forgotten username? View your medication history and allergies Password: Forgotten password? Sign In For help signing in click here Need to Register? Click here to register for Vision Online Services.

More about Vision Online





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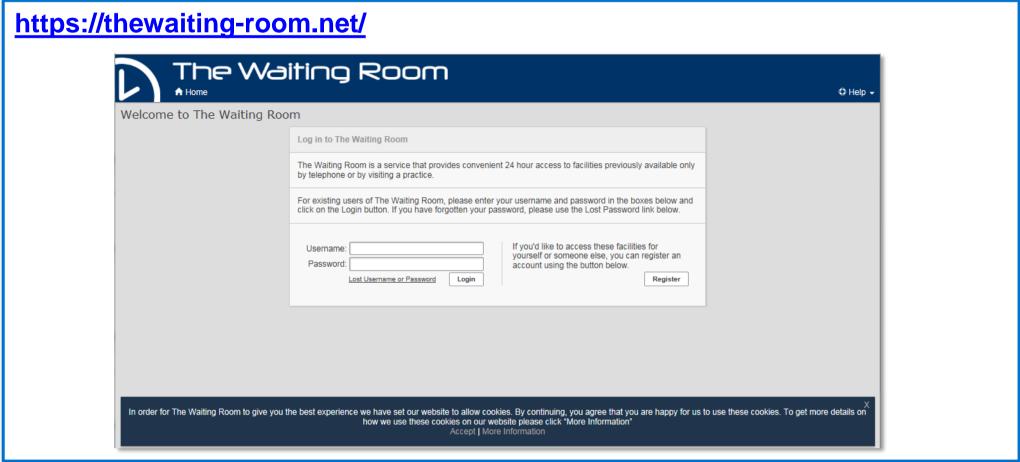
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### Microtest - The Waiting Room



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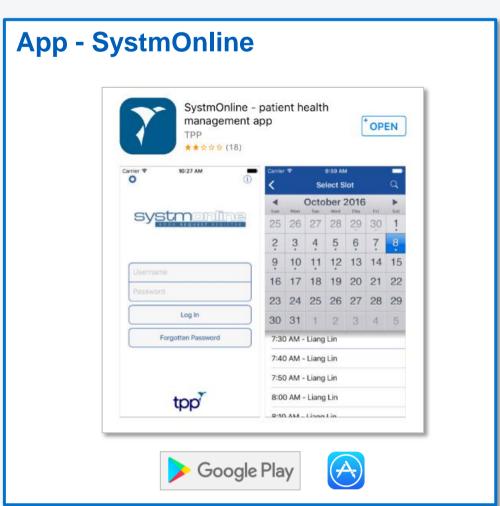
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## **TPP - SystmOnline**





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### **Evergreen Life** (formerly i-Patient)





More about Evergreen Life



available for use with EMIS



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# Implementation leads

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

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efficient use of online appointments



business processes for patients to access their detailed coded information

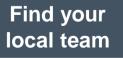


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business processes for ordering repeat prescriptions online.

















# Digital clinical champions

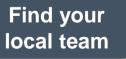
 Digital clinical champions (DCCs) are doctors and nurses from across the NHS who have experience of GP online services

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 They focus on engagement with GP practices in designated geographical areas while continuing to develop relationships with area teams and CCGs.

















#### Local team contacts

REGION	NAME	EMAIL	MOBILE
North	Pam Jenkins	pamela.jenkins1@nhs.net	07918 336 005
North	Kay Renwick	kay.renwick@nhs.net	07768 535 904
Midlands and East	Kayleigh Buckley	kayleighbuckley@nhs.net	07710 152 881
Midlands and East	Tristan Stanton	Tristan.stanton@nhs.net	07710 152445
London	Shona Ash	S.ash@nhs.net	07900 712 995
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



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#### Contact us





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

#### We would like to hear from you

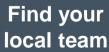
NHS England value your opinions and experiences. We want to ensure that your views are heard across all parts of the healthcare system, at all levels, and are therefore committed to working and engaging with GPs, practice staff, clinical commissioning groups and commissioning support units.

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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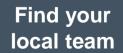
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**Vouching with confirmation** 

What you need to do
Why patients want it
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