Patient Online
Support and Resources Guide
third edition

GP Practices
RCGP Guidance and Toolkit
Case Studies and Benefits
About Patient Online
Glossary and Terminology
GP online services - what patients see
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 Patient Online
- Glossary and Terminology
- GP online services what patients see

**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.

- FAQ
- Find your local team
- Contact us
- Order materials

- NHS Choices

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.
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

As a practice manager you would need to:

- 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
- include the roles and responsibilities of staff 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
- make all staff aware of any version upgrades or changes in policy or processes and how these might affect what they are doing
What you need to do

As a practice manager you would 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 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
Identity checking

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
ID documents

• Most patients are able to prove their identities 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 bills
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.
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.
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.

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.)
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 Patient Online services.

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.

Patients they will know this service as **GP online services** rather than Patient Online.

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

Posters and leaflets

Appointments cards

Balloons and bunting

FREE to order from the NHS orderline
Information for patients

- Patient leaflets
- PPG toolkit
- Access considerations for patients with disabilities

FAQ | Find your local team | Contact us | NHS Choices | Order materials

HOME | INDEX
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.
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.

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

*The Plain English Campaign*
Easy read leaflets

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.

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

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.

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, 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.
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

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- 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
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
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.
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.

- Identity verification
- Registration for online services
- Patient centred care
- Appointments
- Records access
- Coercion
- Proxy access
- Information governance
- Promoting Patient Online

These eLearning courses are available at www.elearning.rcgp.org.uk/patientonline
Case studies and benefits

Practice case studies

Patient case studies

Time saving calculator
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.

Written case studies

A collection of video case studies are available on the NHS England website (see above), and on the Patient Online YouTube playlist.
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

"Makes me feel like I'm in control"

"GP online services gave me privacy"

"An important tool in my self-care"

"I can find it out myself"

"Great benefit for carers"

"A partnership between me and the doctor"

These videos are available on the Patient Online YouTube playlist and the NHS Choices website.

Benefit

These can take a moment or two to open
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.

<table>
<thead>
<tr>
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<th>Appointment bookings</th>
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<th>Repeat prescriptions</th>
<th>Test results</th>
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<td>Year</td>
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* based on a 7.5 hour working day

How many **DAYS** could Patient Online save your practice?
GP online services delivered by Patient Online

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

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
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

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.
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.
In general practice today

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.

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.
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.

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

Test results
Records access

These can take a moment or two to open
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.

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.
Glossary and terminology

- Glossary
- Terminology
- Acronyms and abbreviations
<table>
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<tr>
<th>Glossary terms</th>
<th>Coercion</th>
<th>Digital clinical champion(s)</th>
<th>Identity management (also referred to as ID Verification)</th>
<th>Implementation lead</th>
<th>Summary information</th>
<th>Proxy access</th>
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<tr>
<td>Coercion</td>
<td>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.</td>
<td>Health professionals providing clinical advice and guidance to aid national implementation of the Patient Online programme.</td>
<td>The process of checking that a patient wishing to register for online services is who they say they are.</td>
<td>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.</td>
<td>Summary in patients’ GP records (e.g. allergies, adverse reactions and medications) as outlined on the GMS contract.</td>
<td>Access to a patient record, with the patient’s consent, by somebody other than the patient (e.g. patient’s relative)</td>
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### Terminology

<table>
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<tr>
<th><strong>Beacon Sites</strong></th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Case study (-ies)</strong></td>
<td>Descriptive research using direct observations, interviews and protocols that looks at how practices and patients use online services.</td>
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<tr>
<td><strong>Clinical system supplier(s)</strong></td>
<td>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.</td>
</tr>
</tbody>
</table>
### Acronyms and abbreviations

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
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<tr>
<td>APMS</td>
<td>Alternative provider medical services</td>
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<td>CCGs</td>
<td>Clinical commissioning groups</td>
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<td>CSUs</td>
<td>Commissioning support units</td>
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<td>EPS</td>
<td>Electronic Prescription Service</td>
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<td>EMIS</td>
<td>GP practice IT system provider</td>
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<tr>
<td>FAQs</td>
<td>Frequently asked questions</td>
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<td>GP</td>
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<td>GPSoC</td>
<td>GP Systems of Choice</td>
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<td>INPS</td>
<td>GP practice IT system provider</td>
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<tr>
<td>LMCs</td>
<td>Local medical committees</td>
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<tr>
<td>Microtest</td>
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<td>NAPP</td>
<td>National Association of Patient Participation</td>
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<td>NHS</td>
<td>National Health Service</td>
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<td>PC</td>
<td>Personal computer</td>
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<td>PAERS</td>
<td>GP practice IT system provider</td>
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<td>Personal Medical Services</td>
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<td>PPGs</td>
<td>Patient participation groups</td>
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<tr>
<td>RCGP</td>
<td>Royal College of General Practitioners</td>
</tr>
<tr>
<td>TPP</td>
<td>GP practice IT system provider</td>
</tr>
</tbody>
</table>
Patients can access GP online services through both websites and smartphone apps. This is to make it convenient for the patient and to let them get online and use GP online services in their easiest way for them.

**Websites**

**Apps for tablets and smartphones**

- **Android**
- **Apple**
EMIS – Patient Access

https://patient.emisaccess.co.uk/

App - Patient Access

More about Patient Access

FAQ
Find your local team
Contact us
NHS Choices
Order materials
https://myvisiononline.co.uk/vpp/login.jsp

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.

Already registered? Sign in below.

- Practice ID:
- Username:
- Password:

For help signing in click here

Need to Register?
Click here to register for Vision Online Services.

Using this service you can
- Book and manage appointments
- Order your prescriptions
- View your medication history and allergies
Microtest – The Waiting Room

https://thewaiting-room.net/

The Waiting Room

Welcome to The Waiting Room

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: [ ]
Password: [ ]

If you would like to access these facilities for yourself or someone else, you can register an account using the button below.

Register

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 cookies. To get more details on how we use these cookies on our website please click "More information".
TPP - SystmOnline

https://systmonline.tpp-uk.com/

App - SystmOnline

More about SystmOnline

Patient screens
Evergreen Life (formerly i-Patient)

https://e-life.co.uk/r

App – Evergreen Life

More about Evergreen Life

available for use with EMIS
Find your local team

What is an implementation lead (IL)

What is a digital clinical champion (DCC)
Implementation leads provide tailored information and support on a range of subjects, such as:

- 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 contacts

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

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

We would like to hear from you
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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EMIS – patient access
Evergreen Life

Glossary and terminology
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GP online services delivered by patient online
GP online services what patients see
GPs
GP Online services promotional toolkit

How we can support you
i-Patient
ID documents
Identity checking
In general practice today
Implementation leads (ILs)
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Microtest – the waiting room

Patient case studies
Patient leaflets
Plain English leaflets
Posters and promotion
PPG toolkit

Practice managers
Practice nurses
Practice reception team

Terminology
Time saving calculator
TPP – systmonline
RCGP guidance and toolkit

Vision – vision online
Vouching
Vouching with confirmation

What you need to do
Why patients want it
Why the NHS is doing it
Why and how

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