

PATIENT ONLINE SUPPORT AND RESOURCES GUIDE Second edition

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#Patientonline



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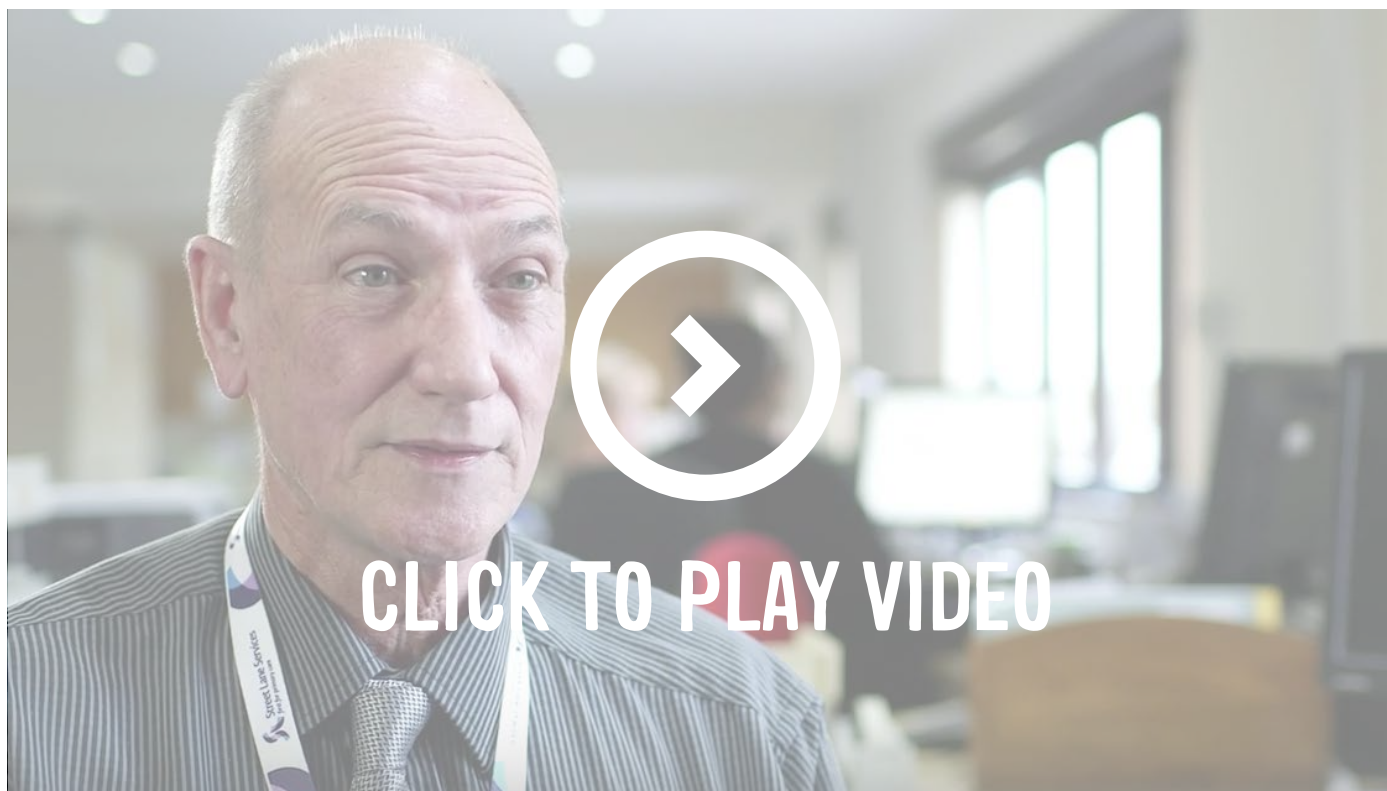
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VIDEO

At Street Lane Practice in Leeds, a total of 2,020 patients have registered for Patient Online services so far. 560 of them have full record access. Watch the video to know more about the benefits of detailed online record access or click [here](#) to read the story.





INTRODUCTION

Welcome to the second edition of NHS England's Patient Online Support and Resources Guide.

We had a great response to the first edition and it is encouraging to see Patient Online services being implemented in GP practices nationwide. In this second edition we have added additional resources to help enhance already existing services and included case studies to highlight some of the inspiring achievements being realised by GP practices across the country.

The Patient Online team



Foreword

At Cropsredy we have been offering online repeat prescription ordering for about ten years, first through our website and then via the clinical system, which we find safer and more efficient.

Appointment booking and GP record viewing came about six years ago after consultation with patients and our whole practice team. The sky hasn't fallen in; we have increasing numbers of patients using transactions and a steady number able to look at their full GP record.

As a patient, I am very happy to book an online appointment for myself at a time when I have my home commitments to hand and a choice of slots in front of me. I want to be able to check my vaccination record before I plan my holiday or check what my GP told me at the last consultation when I was a bit nervous and can't exactly remember what she said. I would also like to be able to share my GP record with hospital staff if the circumstances arose.

Not every patient finds this an appealing system. Those not using it can benefit from fewer people calling the surgery and staff who have more time to help.

This is not the future anymore. It is with us now and we have the opportunity to improve the way we work for the benefit of our patients and our practice teams. Why wouldn't you do it?

Lynne Jones
Practice Manager Cropsredy Surgery



WHO IS THIS GUIDE FOR AND WHY IS IT IMPORTANT?

This guide is intended for GPs, practice staff, clinical commissioning groups (CCGs) and commissioning support units (CSUs) who are providing support to GP practices implementing Patient Online.

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.

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





WHAT DO I NEED TO DO?

The General Medical Services ([GMS](#)) contract and Personal Medical Services ([PMS](#)) agreement 2015/16 include the requirement for GP practices to offer patients access to detailed coded data in their GP records by 31 March 2016. GP practices also need to continue to offer and promote online services such as booking of appointments and ordering of repeat prescriptions.





WHAT DO I NEED TO DO?

GP practices must, as outlined in the 2015/16 General Medical Services contract and Personal Medical Services agreement, already promote and offer patients the facility to:

- Book, view, amend, cancel and print appointments online.
- Order repeat prescriptions for medicines or appliances online (this includes viewing and printing of any medicines or appliances for which the patient has a repeat prescription).

Additionally:

- A practice must consider whether it is necessary, in order to meet the reasonable needs of registered patients, to increase the proportion of appointments which are available for patients to book online and take appropriate action.

For online access to detailed coded data in GP records:

- Develop policies and processes ensuring 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 staff should 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 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.

The [Royal College of General Practitioners](#) guidance contains downloadable resources such as registration, consent forms and patient information leaflets. These can be localised for use within practices.



DETAILED CODED DATA

This is the coded data set that practices are required to display. For clarity – all this detailed coded data will be viewable from the day GP records started. Some of the information in the list will depend on what your clinical system is able to routinely display.



Demographic



Immunisations



Procedure codes (medical or surgical) and codes in consultation (signs, symptoms)



Allergies/adverse reactions



Results (numerical values and normal range)



Codes showing referral made or letters received (no attachments)



Medication (dose, quantity and last issued date)



Values (BP, PERF)



Problems/diagnoses



Other codes (ethnicity, QOF)



NOT REQUIRED FROM DETAILED CODED DATA

The following categories of data will not be displayed.



Free text

- Codes
- Results
- Consultations



Letters and attachments



Administrative items

- Diary entries/recalls
- Special notes/warnings
- Tasks/emails/internal messages



SUPPORT AND RESOURCES



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The guidance, practical support and tools provided in this section will help practices fulfil the Patient Online requirements of the General Medical Services ([GMS](#)) contract and Personal Medical Services ([PMS](#)) agreement 2015/16.

These regulations require GP practices to offer patients online access to detailed coded data in their GP records by 31 March 2016 as well as continuing to offer and promote online services, such as, booking appointments and ordering repeat prescriptions.

These regulations are subject to the necessary GP systems and software being made available to practices by NHS England.



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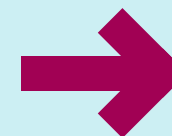
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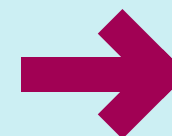
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The Patient Online team has developed guidance for practices to ensure staff are able make the most of the Patient Online services and provide patients with valuable and efficient service.

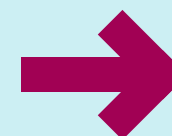
Patient Online: **REGISTERING PATIENTS FOR** **GP ONLINE SERVICES**



Patient Online: **OFFERING PATIENTS ACCESS** **TO DETAILED ONLINE RECORDS**



Patient Online: **MAKING THE MOST OF ONLINE** **APPOINTMENTS AND REPEAT PRESCRIPTIONS**





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PROMOTIONAL MATERIALS FOR PATIENTS

You can download the following 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.



➤ Leaflet

➤ Poster

Renew your prescription online

➤ Poster

View your GP record online wherever you are

➤ Poster

Book GP appointments online at any time

➤ Appointment cards

➤ Content for digital signage boards



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PATIENT INFORMATION LEAFLETS

You can download the following materials which have been designed to help patients understand the services available to them and how to make the most of them. Patients can also be directed to www.nhs.uk/patientonline for a full overview of these services.



Protecting your GP online records

Did you know that you can now look at your GP records, book appointments at your GP surgery and order repeat prescriptions online?

You can already go online and see some of the information in your GP records, including your medications and allergies. During the next year, you will be able to see even more. This will include illnesses, immunisations and test results. Each GP surgery will make this information available at different times, as their computer systems become ready.

Just like online banking, you can look at your GP records on a computer, a tablet or a smartphone, using a website or an app.

If you would like to start using online services, see the Getting Started with GP Online Services guide for more information. Information on how to get started is also available online at www.nhs.uk/patientonline or from your surgery or on their website.

Your surgery has a responsibility to look after your GP records. You must also take care online and make sure that your personal information is not seen by anyone who should not see it.

Keeping your username and password safe

When you register to use GP online services, your surgery will give you a username and password, which you will use to log in. You should not share your login details with others. To protect your information from other people:

- You should keep your password secret and it is best not to write it down. If you must write it down, keep a reminder of the password, not the password itself. This should be kept in a secure place.
- If you think someone has seen your password, you should change it as soon as possible. You may want to call your surgery if you are not able to change it right away, for example, when you do not have access to the internet.
- You should not share your user name or password. No one should force you to show them your login details, you have the right to say no. If someone forces you, tell your surgery as soon as possible.

➤ **Leaflet 1**
Getting started with GP online services

➤ **Leaflet 2**
Protecting your GP online records

➤ **Leaflet 3**
What you need to know about your GP online records

➤ **Leaflet 4**
Coming soon

➤ **Leaflet 5**
Coming soon

➤ **Leaflet 6**
Coming soon



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FREQUENTLY ASKED QUESTIONS (FAQS)

The Patient Online team regularly receives questions from patients and GP practices about the programme. Click on the links below to download the answers to the most frequently asked questions:

FAQS
PATIENTS

FAQS
GP PRACTICES

If you have any additional queries, please contact us via
england.patient-online@nhs.net



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ROYAL COLLEGE OF GENERAL PRACTITIONERS GUIDANCE

The Royal College of General Practitioners (RCGP) and the Patient Online team worked closely together to develop the resources practices need to get patients online. These include practical tools, checklists, forms and sample policies, such as:

- **Getting started with records access**
- **Identity verification**
- **Coercion**
- **Proxy access**

Guidance and practical tools

You will find lots of useful information and practical tools on the following topics:

- **Records access** – getting ready checklist with a step-by-step guide
- **Sample leaflet** – provide to patients to explain their responsibilities and some of the issues they may need to consider
- **Example form** – for patients to use to request access to online services
- **Identity verification** – getting ready checklist with a step-by-step guide
- **Identity verification** – example practice protocol

You can access the complete RCGP guidance and materials [here](#). We are currently working on additional guidance.



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REGIONAL AND LOCAL SUPPORT

Implementation leads

Clinical commissioning groups (CCGs), local medical committees (LMCs), commissioning support units (CSUs), practices, regional and area teams can ask implementation leads for tailored information 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 will focus on engagement with GP practices in designated geographical areas whilst continuing to develop relationships with area teams and CCGs.

Find your nearest local implementation lead and digital clinical champion [here](#). Contact us [here](#) for details on local area teams available to assist.

The Patient Online programme's website has readily available information and offers a private and secure online environment. This allows us to communicate, collaborate and share information with our stakeholders via 'contact us' and 'leave a reply' sections.



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NHS England is providing support to practices through a network of locally-based implementation leads and digital clinical champions.

Click on your region





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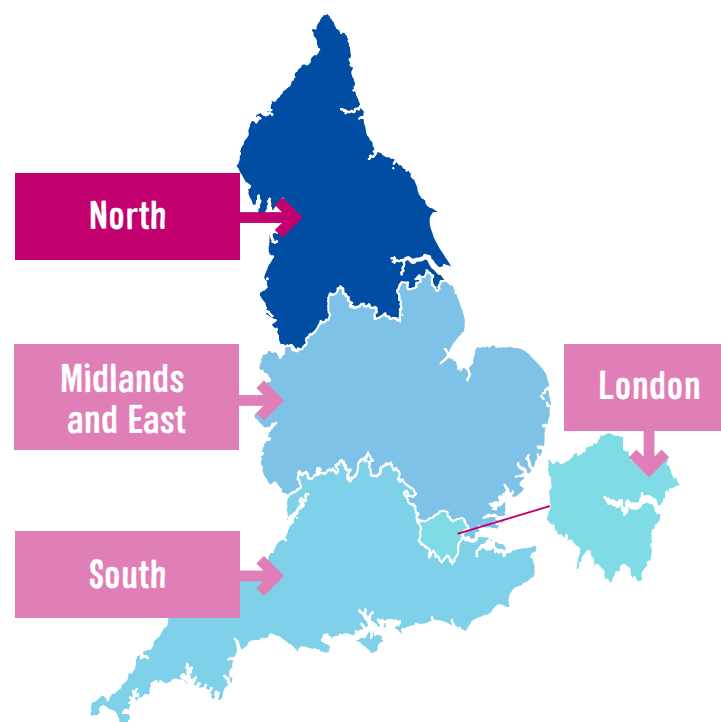
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Click on your region



Digital clinical champions

x

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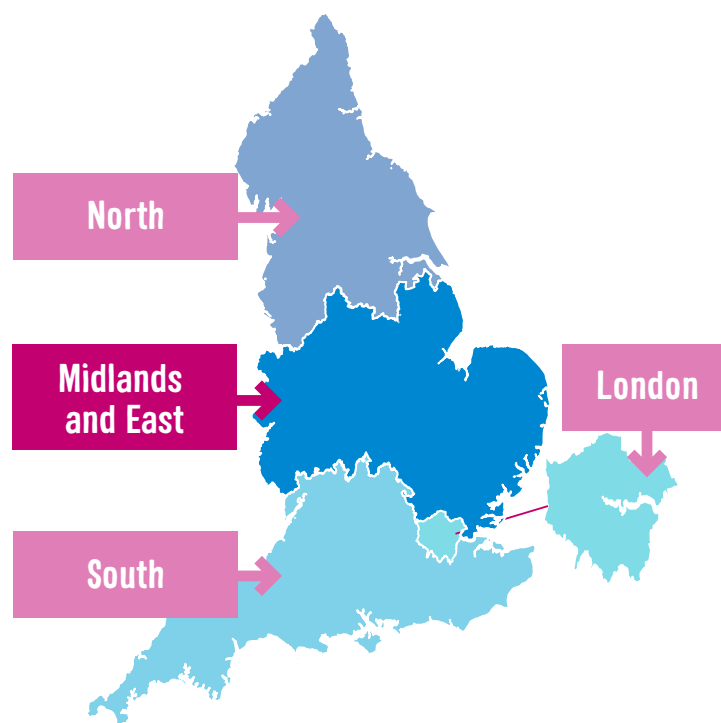
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Digital clinical champions

x

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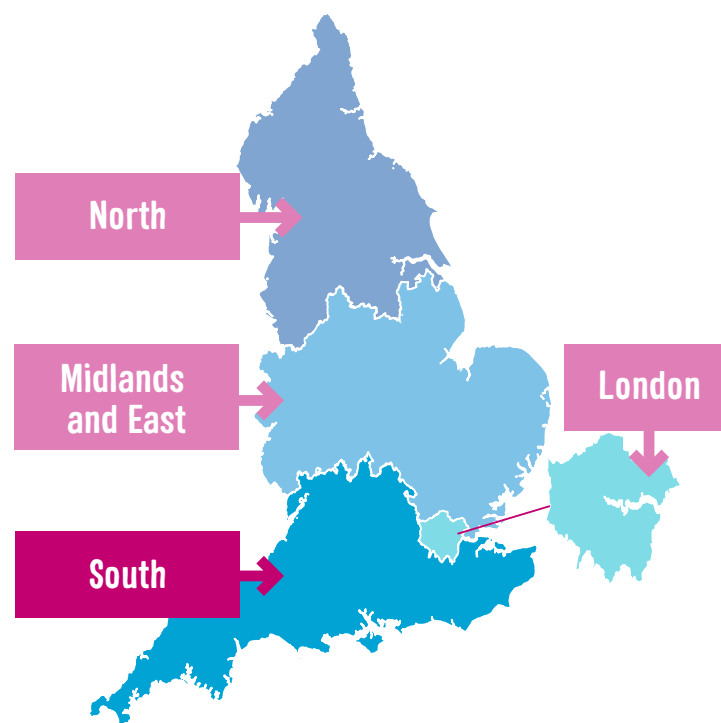
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Digital clinical champions x

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SUPPLIER SPECIFIC GUIDANCE

Clinical system suppliers who are able to provide the necessary technology to support the implementation of Patient Online services in GP practices are listed below.

➤ EMIS

➤ INPS

➤ MICROTEST

➤ TPP





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SO FAR





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This section provides information about accelerator sites which have been testing and sharing ways to improve online services for patients.

It provides a summary of learning so far, a selection of case studies, accelerator site findings and sample processes and materials they use. An overview of the evidence regarding the benefits of online access is also included.





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CASE STUDIES

The Patient Online team is currently working closely with selected GP practices across England and in this section we will highlight what we learned from them. We will cover every aspect of the Patient Online programme from practical information on how to register a patient to suggestions of what your practice can do to promote the programme. There will be video case studies with testimonials from both patients and GP practices as well as written case studies that will highlight the benefits of GP online services.

To find out more about what we've learned so far, have a look at our [case studies](#) from 2014/2015.





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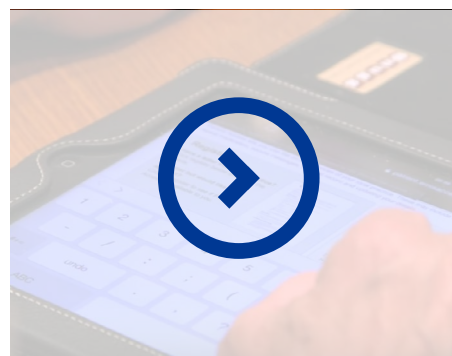
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CASE STUDIES (CONTINUED)



Street Lane Practice in Leeds



Kirkburton Health Centre

PATIENT ONLINE
BENEFITS OF ONLINE ACCESS
TO RECORDS CASE STUDY

NHS
England

**BENEFITS OF ONLINE
ACCESS TO RECORDS
FOR GP PRACTICES
AND PATIENTS**

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COMING SOON



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ACCELERATOR SITES FINDINGS

A number of GP practices are at the forefront of digital improvements, with widespread deployment of online systems. They demonstrate a clear commitment to adopting and adapting new technology to benefit patients and their own ways of working within their practices.

To bring together this knowledge and enhance learning across the country, the Patient Online programme is working with those sites that wish to share their expertise and learning with others. The practices vary in size and type, and are geographically spread across England in both urban and rural areas.

Through working with implementation leads, the practices have shared their experiences of implementing the changed ways of working. Please see the selected case studies provided with this guide and visit www.england.nhs.uk/ourwork/pe/patient-online/ for further information and updates.

A number of these accelerator sites have also engaged their patient participation groups (PPGs) to gather their views on online services and identify their support requirements.



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Summary of learning so far from the accelerator sites

Learning is ongoing, but the following has emerged so far:

- Practices that promote and enable record access, as well as appointment booking and repeat prescription ordering online, have found a very positive response from many patients, particularly those with long term conditions who are in frequent contact with the practice.
- Practices have found that patients have managed their online services well, over 95% of practices now offer access to summary information.
- This service will be available for any patients who wish to use it; not all patients will want to use electronic systems. Some patients are concerned that those without smartphones, PCs, laptops, tablets and internet connection will be at a disadvantage in booking appointments.
- Practices who offer a higher proportion of their appointments online find the systems work more easily and effectively.
- Patients have said they found access to their summary information (e.g. allergies) helpful when completing forms provided by the health service.



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ACCELERATOR SITES FINDINGS (CONTINUED)

- When the development of online patient access is linked to other GP system functions, such as electronic prescription service (EPS), the process becomes more streamlined and hugely benefits the patients.
- Most practices find shared examples from other practices their most useful resources.
- The practices that use a wide range of promotional tools, including waiting room TVs, their website, prescription notes, newsletters, and business card format reminders, are successfully increasing the number of patients who sign up for online services.
- Some clinical system suppliers' software is not yet available or does not work appropriately, which has slowed progress for those practices.





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LEARNING FROM GP PRACTICES WHO HAVE ADOPTED ONLINE SERVICES

Online appointment booking and repeat prescriptions – top tips

The Patient Online team has interviewed staff from GP practices across the country who have already adopted online services. They have shared their top tips to maximise transactional services online, increase detailed record access and provided their views on these services.





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Online appointment booking and repeat prescriptions – top tips

X

Offer high percentage of appointments online

Review the appointments that are currently being offered over the telephone or face-to-face which could be made available online. It is important to be able to offer a high percentage of appointments and a range of appointment types as part of the online services offering.

Encourage patients during consultation

Consultations provide a great opportunity for GPs to encourage patients to opt-in to GP online services.

Offer to new patients

The registration of new patients is a great

opportunity to get patients online. Consider devising a system whereby log in details for online services are issued at the point of registration. However, some patients may want the opportunity to opt-out if they wish.

Limit taking prescriptions over the phone

Consider removing the facility to take prescription requests (with a few exceptions e.g. for vulnerable patients) over the telephone. This method has been a major success factor in increasing the numbers of patients ordering repeat medications online. Although, this is not a mandatory requirement,

and will require cultural change for both practices and patients, it is undoubtedly a safer and quicker process for both.

Staff training

It is important to be prepared; ensure your processes are in place and staff are trained before the implementation of online services begins.

Clear promotion to patients

The implementation of a clear campaign can be very effective at promoting transactional services. Examples of campaign channels include, Facebook, Twitter, TV screens, T-Shirts, answering machines.



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What the GPs said about online appointments and prescriptions

“There’s nothing to be afraid of. The whole set up process is simple. Just do it!”

“Big thing for us is that it is a whole team effort - if you don’t do it as a team it becomes responsibility of the receptionist”

“Start really promoting early - the sooner you do it the better it is”

“We’ve seen phone calls reduce significantly”

“Get the PPG on your side”



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Slowly open up detailed record access

The majority of practices who have already implemented online services have slowly built in the availability of detailed online record access.

Staff champion/ patient champion

Patients who champion the practice and are happy to help gain the confidence of new patients are thought of as a common denominator for many high performing practices.

Offer basic access automatically

Practice staff automatically offer basic access and then review if full access is appropriate, which can then be provided directly.

Efficiency in systems

Create templates that can be used internally by staff to ensure new processes are simple, quick and easy to implement.

Strong leadership

Managerial and clinical leadership is key to ensuring that patients are provided with a great service and for identifying ways in which the service can be improved.

Clear promotion to patients

It is important to understand when the patient interacts with the practice so you can advertise the availability of online services e.g. an online access pop up appearing as soon as the patient lands on the practice website.



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“It takes around 10 minutes to look through a request online – on paper it is very time consuming”

“Decide what your protocol is, keep it simple”

“Offering records access is more time consuming but only initially”

“If this wasn’t switched on we couldn’t manage and would need at least another member of staff!”

“Took a planned approach to online services – done in manageable chunks”

“Makes for richer consultation and discussion”



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BENEFITS OF PATIENT ONLINE

The evidence for the benefits of online interactions between patients and their general practices continues to grow.

Sources for this include published articles and reports, such as Making Time in General Practice, written by the Primary Care Foundation and NHS Alliance and published in October 2015. This report looks at how the workload crisis in England's 8,000 GP practices can be tackled by making time. Amongst other things, it explores the array of benefits offered by new technology and GP online services.

This section also includes the evidence review that underpinned the Department of Health's information strategy, The Power of Information, published in May 2012. Further evidence has been gathered from across the country, including from the Patient Online accelerator sites.

The benefits identified to date are summarised on the following pages.





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Online access helps to improve access to care services, making them more convenient, with streamlined transfers between different points of care. In turn, this contributes to improvements in levels of patient satisfaction and more efficient delivery of services, supporting better use of clinical time.



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Better information can empower patients and carers, leading to increased health knowledge and health literacy. In turn, this can improve levels of patient satisfaction and wellbeing. Accessing GP records means that patients can review up-to-date and relevant information pre- or post-consultation (including out of hours). This increases meaningful interaction and more shared decision-making between patients and their health professionals and encourages patient ownership of their own health and care.



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Online services, information sharing and transactions support increased patient safety, including fewer mistakes, duplications, complaints and erroneous drug doses.



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The use of online services can support improved business processes, helping to reduce the administrative workload of practice staff. Time released by such efficiencies will be available to support increased productivity and improvements to other aspects of care services, such as better quality reception services and a better experience for patients, particularly those who still prefer to or need to use the phone.



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Online appointment booking can improve and speed up access to clinical expertise, leading to higher levels of patient satisfaction and enhanced health and wellbeing.



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Online booking services can improve communication between patients and their practices, leading to higher levels of convenience and patient satisfaction.



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An increase in the number of patients booking, cancelling and amending appointments online can reduce phone calls to practices. Benefits for patients and staff include increased patient satisfaction and greater operational efficiencies for the practice.



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The use of online booking services can decrease waiting times for appointments by reducing the number of people who do not turn up for their appointment.



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Increased use of online repeat prescription services can lead to reduced travel time for patients, more convenience and higher levels of patient satisfaction. Additionally, it can result in a decrease in the quantity of drugs required to be held in stock, reducing cost outlay for pharmacies.



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Patient satisfaction and wellbeing is increased by their ability to make more informed decisions about their health and care, facilitated by access to personal health records.



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NHS Mandate:

The government set out its commitment to enabling patients to view their online health record by March 2016 in the NHS Mandate.

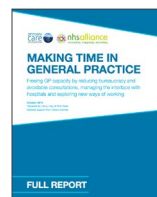


Business Plan:

Putting Patients First: the NHS England business plan for 2014/15 – 2016/17.



Making time in General Practice; Freeing GP capacity by reducing bureaucracy and avoidable consultations, managing the interface with hospitals and exploring new ways of working:



Report by the Primary Care Foundation and NHS Alliance, 2015.

Five Year Forward View:

The NHS Five Year Forward View was published on 23 October 2014 and sets out a vision for the future of the NHS.



Personalised Health 2020:

Using Data and Technology to Transform Outcomes for Patients and Citizens.



Patient Online: The Road Map, RCGP, 2013:

The programme of work described in the Road Map established what could realistically be offered now and what might be offered in the future.





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The power of information: putting all of us in control of the health and care information we need:

Department of Health, 2012.
The Government's ten-year framework for transforming information for health and care.



A blueprint for building the new deal for general practice in England:

A comprehensive plan from the RCGP on building the new deal for general practice in England.



GMS guidance and audit requirements:

Guidance for practices that hold a GMS contract.



Quality first: Managing workload to deliver safe patient care:

BMA guidance to help practices ensure that the safe provision of core services to patients remains a core priority for GPs.



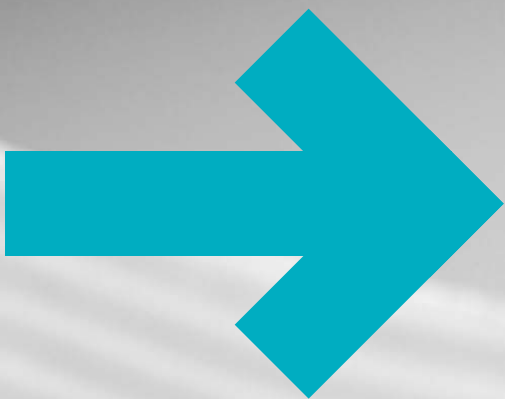
GP Systems of Choice (GPSoc):

The scheme through which the NHS funds the provision of GP clinical IT systems in England.





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ABOUT THE PATIENT ONLINE PROGRAMME

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.

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.

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.

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

By 31 March 2016, online GP records should include 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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NHS England is also supporting practices to deliver these commitments by:

- working closely with clinical and non-clinical practice staff and professional organisations to develop guidance and training materials for GP practices
- working with GP practices to ensure that staff have access to the guidance, tools and information they need
- putting practices in touch with those who are already successfully offering online services
- supporting a number of 'beacon sites' to lead the way in demonstrating how online services may help patients and GP practices. Beacon sites are practices currently offering full record access to patients. These sites are found across the country
- developing case studies about practices who have already adopted online services





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Together with our stakeholders, we will:

- listen to patients and involve them throughout the programme, ensuring we respond to their needs
- develop new ways of working to allow easier patient access to GP practice services online
- develop patient guidance to ensure available services can be easily used

In the meantime, we would like to hear about your experiences to date and listen to your views. We are committed to working and engaging with patients, carers, healthcare staff and the public. Your views are essential for creating and delivering better health and care services.

**Please get in touch:
england.patient-online@nhs.net**





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1. Acronyms and Abbreviations

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

In Practice Systems GP practice IT system provider

LMCs Local medical committees

Microtest GP practice IT system provider

NHS National Health Service

PC Personal computer

PMS Personal Medical Services

PPGs Patient participation groups

RCGP Royal College of General Practitioners

TPP GP practice IT system provider



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2. Terminology

Accelerator site(s)

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, Microtest, TPP SystmOne, INPS) 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.

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 parent or carer).



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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.

Please email:
england.patient-online@nhs.net

