ONLINE APPOINTMENTS AND PRESCRIPTIONS GETTING STARTED

Every practice in England may offer their patients online services that enable patients to book and cancel appointments, order repeat prescriptions and send messages to their practice about their medication. These services are often called transactional services. They are popular with patients and practices because they offer efficiency, convenience and clinical safety. For English practices it is a contractual requirement to offer online transactional services and the patient’s detailed coded record.

This guidance describes how to manage the addition of online services to the way that practices manage appointments and repeat prescriptions. It covers:

• the benefits of implementing online practice transactional services
• how you might like to set up your appointment booking system
• how you might like to set up your prescribing system
• practice organisation and staff training for transactional services
• some of the barriers and difficulties to successful patient uptake of transactional services and how to monitor the success of the system
• how to manage the special circumstances where the practice is asked to allow a third person other than the patient themselves to have access to their online account on their behalf. For example this may be a parent, partner or staff at a residential institution who can then book appointments or request repeat prescriptions.

Why offer online transactional services?

Online booking and cancelling of appointment booking and repeat prescription requests, referred to as transactional services, offer convenience, safety and accessibility to patients and save practices time. Since 1st April 2015 it has been a contractual requirement that English GP practices offer these services to all patients. Practices must also routinely ensure that the number of appointments available to be booked online meets the reasonable needs of their registered patients.

This document provides a general overview of online transactional services and may help you improve the services you offer. If your practice has not yet started to offer transactional services the information in this document will help with planning their implementation.

Box 1: Benefits for patients

• Patients like the ease, convenience and control of making and managing their appointments and requesting prescriptions online from their smartphone, tablet or computer.
• Online services are available when the practice is closed or busy.
• Patients report that they have found it easier to select their preferred GP when booking an appointment and pick from a list of medication on the screen.
• Patients have a messaging function available to them on some systems. They can leave a message, for example to ask about a specific medication item.
• Online access helps patients with sensory difficulties, learning difficulties or reduced mobility.

Box 2: Benefits for practices

• Reduced telephone calls and surgery visits to make, cancel or re-schedule appointments
• Possible savings of staff time.
• Patients can leave a brief message at the time of requesting a prescription, therefore potentially saving more telephone time or appointments.
• Patients may identify errors in their repeat prescription list, perhaps items they no longer take. It, as highlighted through recent published evidence1
• The practice can respond at a suitable time, avoiding exchanges of missed calls.
Practices have found online booking quick and easy to set up. Registration for online booking of appointments is a relatively simple process (See Example registration form) and a good first step towards the introduction of other online services such as repeat prescriptions, messaging and record access (See Online Records Access, getting started). Patients appreciate the convenience of this service and it has several benefits for practices. Online appointment booking can soon become part of the normal business of the practice.

Setting up online transactional services
Consider how you would like to run your online appointment system
Configure your computer system to accept online booking and cancelling of appointments and set up the surgery sessions to suit your practice appointment schedule. This should only take minutes. Your system supplier will have published guidance on how to do this in your system.

Decide which members of the practice team should have appointments available to book online. You may feel that initially you only wish to offer GP slots. Online booking of nurse appointments will be simpler if they already run specific clinics such as for cervical smears, diabetes or flu vaccinations. Information for patients highlighting these clinics could be provided on the practice website or in care plans.

Decide the number and type of appointments to be made available online. You can choose, for example, to make only routine appointments available online so that you retain control of booking into urgent slots. Some practices only allow regular patients to book online. Others restrict appointment booking to patients over 15, at least until the practice is experienced at managing online appointment booking. Another option is to embargo some slots and release them for online booking periodically.

Decide on a maximum number of appointments that a patient may hold over a fixed time period. Many practices limit the number to two or three to prevent individual patients making appointments “just in case” they need them and thereby reducing availability to others. Some system suppliers allow patients to book one appointment through the website before registering for online services.

To avoid inequity with those not using online booking, online appointments may be released at the same time that slots are made available to patients booking by other means such as over the telephone.

Online slots may also be booked manually by a receptionist. As soon as a slot is booked by any means, it becomes unavailable in both the patient view, and receptionist view.

Consider involving your patient participation group in designing the system.

Consider how you would like to run your online prescription service
Configure your computer system to accept online repeat prescribing. Your GP system supplier will have published guidance on how to do that in your system.

Ensure that the new system complements existing services and clinical workflows. It will not entirely replace the existing methods of requesting repeat prescriptions using the right hand side of the prescription at the surgery, or over the telephone.

Uptake of the online service can be rapid although this is dependent how successfully the practice promotes the service. Plan for the change in the amount of time spent in processing requests coming through all channels.

If a patient already has online access, for example to appointments, systems may allow practice staff simply to tick the online repeat prescription functionality for that patient.

Consider the involvement of your patient participation group in designing the system.

Consider any factors that may make online prescription ordering inappropriate for some patients because some patients may have difficulty keeping to allowed quantities of certain prescriptions and the service may not always be appropriate for them.

Establish the roles and training needs of staff
Identify a lead GP and lead staff member whose role it is to plan, design the system, identify and manage risks, ensure training and monitor the system.

Make sure that every member of the practice team who will be working with the service understands the purpose of the system and how it will fit in with and complement current services. Staff training
needs are outlined in box 3. GP system suppliers provide guidance on how to configure and use their systems

RCGP guidance found in the Patient Online Toolkit and NHS England training tools for practices can provide a basis for this.

Box 3: Staff training needs
Practice team members will need to be able to carry out the following tasks as their roles require:
• Understand how the online appointment, prescription and messaging system works
• How it affects other practice services such as clinics, influenza vaccinations and medication reviews
• How to inform patients about using online services and help them register
• How to verify the identity of patients
• How to help patients keep their online access secure
• How to support patients with sensory, intellectual or other needs such as limited IT literacy
• How to identify risk of coercion (please see Special Circumstances below)
• How to manage proxy access (please see Special Circumstances below)
• How to address patient concerns.

Develop a clear protocol for registering new patients to the system

Your system supplier will provide guidance on how you can use the computer system to register new applicants and activate their new account. The system may include an SMS reminder option to warn patients of forthcoming appointments.

Patients may register for appointment services immediately without verifying their identity. Your computer system may allow patients to do this online.

The RCGP Patient Online toolkit offers further guidance on registration processes and online services, and a registration form template.

Patients new to online access must register in person so that their identity can be verified and they can be given their account details directly. Please refer to the Identity Verification guidance in the Toolkit. Personal details including passwords for login in to the online service must only be given to the patient themselves after their identity has been verified, except in specific circumstances (see Special Circumstances below for further guidance).

Once the patient activates the account, they will be able to book their first appointment online.

Box 4: Methods of identity verification
There are three valid ways to verify the identity of the person who is asking for online access for transactional services or records access:
• Most patients can prove their identities presenting two forms of documentary evidence: one must include a photo that clearly matches the patient and confirmation of the address of the patient that you have on your records. Acceptable documents include passports, photo driving licences and bank statements, but not bills. A full list of acceptable documents as published by the Cabinet Office.
• There will always be some patients (e.g. temporary residents, travelers or young people living with their parents) who do not have acceptable identity evidence. In these cases, 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, may be able to vouch for their identity. Practices must judge each patient on a case-by-case basis while ensuring that the agreed policy takes into account the duration of registration and frequency of patient contact.
• If neither of these two methods of verification are possible, consider using information in the patient’s health record to verify the identity of the applicant. A trained member of staff may be able to satisfy themselves of the applicant’s identity by obtaining responses to questions from information held in the medical records. This should take place discreetly and ideally in 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.

Promote patient online services to patients

Promoting patient online should be done through the usual practice routes including placing information on the practice website and on waiting room screens, in practice booklets and newsletters and on prescriptions. Posters in the waiting room may help and the patient participation group may be able to help to spread the word. Don’t forget the needs of patients with sensory difficulties or other disabilities and whose first language is not English.

To cater for all patient needs you may need to provide large print notices, braille and easy to read material. For further advice about this please visit NHS England Accessible Information Standard.
Recognise and resolve barriers to the use of online services

Uptake of online appointments by patients is usually good. By the end of March 2017 over 11 million patients in England were registered for booking appointments online. In March 2017 over 1 million appointments were booked online. However, there are barriers that individual patients face that the practice may be able to help overcome, such as making more types of appointments available to book online.

Patients may lack access to the internet or the digital skills to use the system. Organisations such as the Good Things Foundation are involved in the NHS programme of widening digital participation by individuals and through community working. Barclays Bank is one of the major commercial providers of training in digital skills.

Patients may be unaware of the system. Effective promotion of the system is important and may need to be revisited if there is poor uptake.

Problems with registration or account activation may arise because of unsuccessful training by practice staff or problems with the computer system. A careful assessment of the need for further staff training may help overcome low uptake. Your system supplier’s support team may be able to help if the problems seem to lie with your computer system.

Monitor the system for successes and problems

Keep a log of issues with the system – encourage team members and patients to report problems and take action to fix them. Think about how you could make this straightforward for patients. You can track uptake and use of your online services through NHS Digital’s GP Data Hub.

Run periodic reports to identify whether patients who have registered for the online appointment booking service are using it to book their appointments. If not look into why this might be, consider patient questionnaires.

Special circumstances

Proxy access

This is access to online GP services by someone other than the patient, usually acting on the patient’s behalf with the patient’s explicit consent.

Patients may choose to share online access login details with family, friends, carers and advocates (including care home staff). If the practice is aware that a patient is considering this course of action, they should make sure that they are aware of the risks associated with doing so. Staff members should be mindful of coercion of the patient (see below). The risk may appear to be low especially if the patient only has access for booking appointments but there are particular risks of disclosure of an appointment booked or a prescription requested by a competent young person where parents have proxy access.

The NSPCC has clear advice about making decisions about whether a child is mature enough to make decisions.

Some clinical systems allow patients to see “comments” made by staff when appointments are made and these may be visible to patients booking online. Staff should be alerted to this possibility to avoid inappropriate comments or breaches of confidentiality.

So even if the proxy is to be given access to appointment booking and no other online services, practices should give every nominated proxy their own personal login details. This offers two main advantages:

- The proxy access can be restricted to only allow appointment booking or prescription requesting without record access even if the patient has full record access.
- It is also possible for the practice to remove the proxy access without affecting the patient’s access if that is needed in the future.

The patient should complete a consent form to request proxy access for a named individual and the identity of the patient and the proxy should be verified before the proxy is given access details.

Please refer to Proxy Access guidance in the Patient Online Toolkit for more information to help the practice decide when and how to respond to requests for proxy access.

Safeguarding

Some patients who use online practice services could be vulnerable to coercion by another person who wants access to their record. Coercion might result in patients sharing, possibly private and personal, information against their will, or withholding important information through fear of it being disclosed.
All practice staff involved in informing patients about, or registering them for online practice services, must be aware of the potential impact of coercion, and what signs to look out for to identify patients who might be subject to it. For more complete information please refer to Coercion guidance in the toolkit.