

Online Services (NHS App) Update 07.02.2024

Online services are the patient's electronic record that they can see on the NHS app. From March 2023 we will need photo ID (e.g., Passport, Driving License) to allow a patient access to these records and we can only promote the NHS App. **By law we cannot scan, photocopy, or save identity documents.**

For Patients over the age of 16 we can allow them and someone who they have consented to (in writing) access to medical records

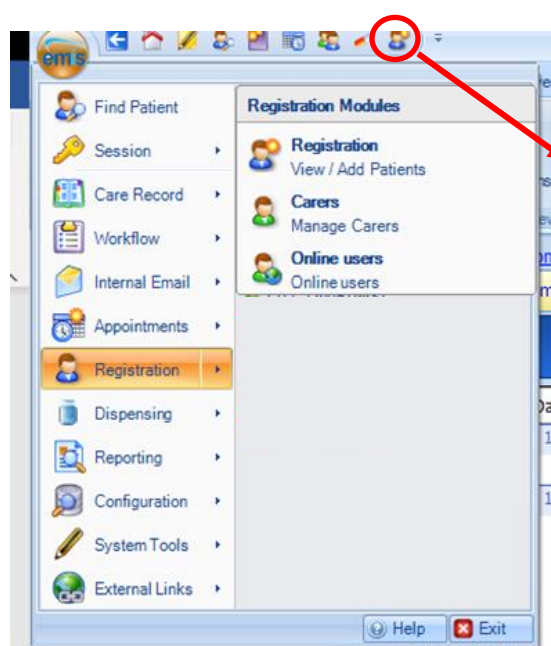
For Children, we can allow parents access to the child's record (Proxy Access) up until the age of 11. Once the child is over 11, we will need consent from them in writing for the parents/carer to have proxy access.

UPDATE – Anyone on the NHS app will now be able to see everything on their record including documents and consultations.

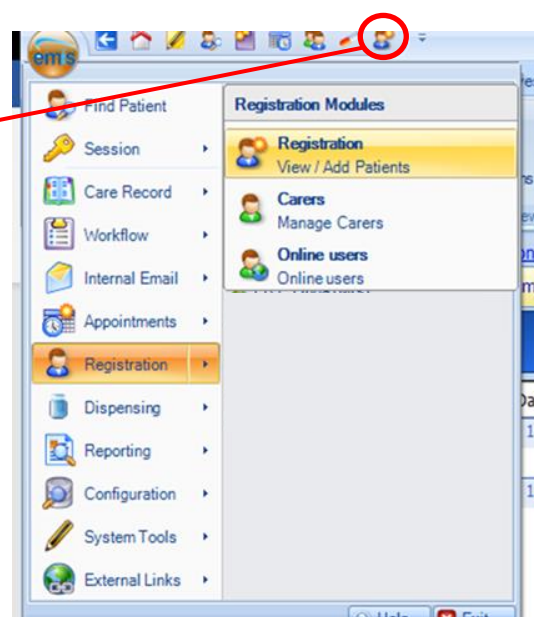
How to Add Online Services:

As we need to see the person who wants access to online services to verify their ID they will need to fill out the new **paper form**. The paper form will have all the information you need including what type of Identity Document was seen and who verified it.

Paper form: Create a new consultation (**on the date the ID was seen**) in EMIS and type in that ID has been seen for online services. Press **save** and start the online services process shown below. This online services form can then be put with the registration forms for scanning. **Photocopies of ID are not allowed under any circumstances.**



Log into EMIS and either use the menu options or the **Man** with the exploding head to go onto the registrations page on EMIS. You should then see this page as shown below.



EMIS Web Health Care System - Clarendon and Midpoint Surgery - 14138

Registration - Cases - Online users

Add Patient - Edit Patient - Deactivate Patient - Patient Management - Confidentiality - Sharing Consent - Identity verification - Registration - Upload GP Registration - Patient Type Configuration - Storage Administration - GPS

SOB - 14 - Referrals - 4 (X) - Documents - 5 - Registration - 1943 (NO) - Tabs - 18 (X)

New priority Workflow items received - Medicine Management

Active - PAK, Peter (Mr) - Born: 13-Dec-1999 (23y) - Gender: Male - NHS No.: Unknown - Usual GP: CONSTANTINOU, Anna (Dr)

1. Demographics 2. Address 3. Online Services 4. Family / Relationship Links 5. Status History 6. Audit history

Personal Details

Name: PAK, Peter (Mr)
 Date of Birth: 13-Dec-1999 (23y)
 Gender: Male
 NHS Number: Unknown
 Marital Status:
 Ethnicity: White: English or Welsh or Scottish or Northern Irish or British - Englan...
 Country of Birth: Born in England
 Date of Entry to UK:
 Main Language:
 Religion:
 Alt. Correspondence Format:
 Patient Type: Dummy

Contact Details

Home Address: Clarendon Surgery
 2 Cockham Road
 Haslemere
 Berkshire
 SL6 8AH
 Home Tel No:
 Work Tel No:
 Mobile Tel No: (07538) 857740
 Fax Number:
 Video Conferencing Details:
 Primary Email Address: peter.chadwell@bris.net

Patient Details

Usual GP: CONSTANTINOU, Anna (Dr)
 Hospital Number:
 Records At: Clarendon
 Old NHS Number:
 Practice Information:
 Branch Surgery:
 Dispensing: No
 Transport Needs:
 Advocacy Needs:

PAK, Peter (Mr)
 Men ACN and Y Vaccination
 1st MMR vaccination
 COVID-19: Eligible for vaccination

From this page you need to go to the Online Services tab as circled above. This will take you to the page as shown below. (Please note this pt is brown on the tab instead of blue as they are a dummy patient)

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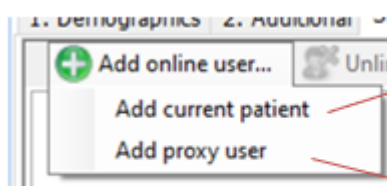
1. Demographics 2. Address 3. Online Services 4. Family / Relationship Links 5. Status History 6. Audit history

Add online user

Relationship:
 NHS status:
 Account status:

PAK, Peter (Mr)
 Men ACN and Y Vaccination
 1st MMR vaccination
 COVID-19: Eligible for vaccination

This is the online services tab from here you need to **add online user**. This will bring up two options:

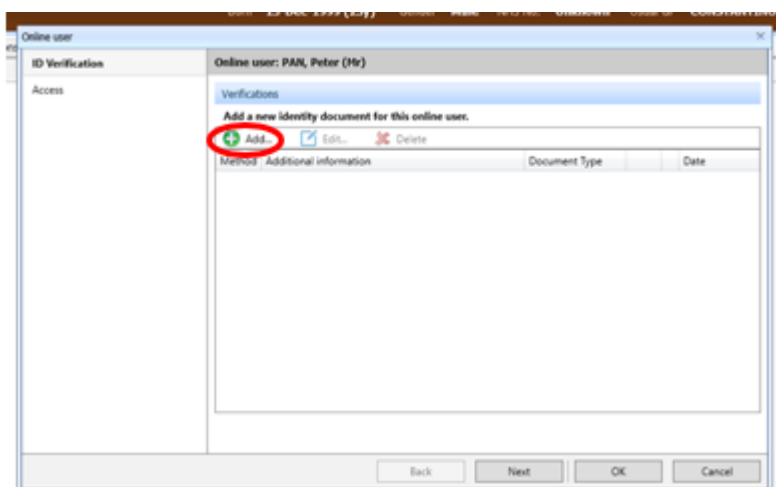


This is for the actual Pt who wants access to their electronic records.

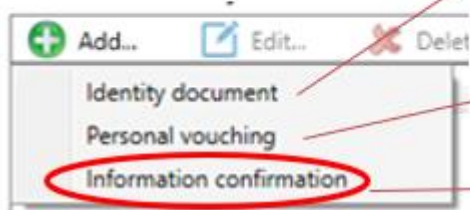
This for people who are not the patient but have been given consent (**In Writing**) by the patient to have access to their electronic record.

Add Current Patient:

Once you have clicked on add current patient the screen shown below will pop up.



Once you have this screen click on the **add button**. This will give you 3 options to choose from



Identity document – Add/upload an ID document provided by the patient. We do not use this option as ID should not be saved onto the Pt's notes only documented it has been seen in the consultations.

Personal Vouching – Vouch for the patient if they are known to you. This is not the one we should be using for online services.

Information Confirmation – Record details of an identity document, e.g., passport and number, without having to scan and upload the document. **This is the one we should be using for all patients.**

Press the **information confirmation** button to get to the next part shown below.

The screenshot shows the 'Online user' application window. The 'ID Verification' tab is active, and the 'Verifications' section is selected. A modal dialog titled 'Information confirmation' is open. It displays 'Online user: PAN, Peter (Mr)' and asks to 'Select the member of staff who confirmed this online user's identity'. The 'Confirmed by' field shows 'STEADMAN, Lauren (Miss)' with a user icon. There is a text area for 'Additional information'. At the bottom of the dialog, the 'Save' button is circled in red. The main window has 'Back', 'Next', 'OK', and 'Cancel' buttons at the bottom.

As you would have seen the copy of the ID on the text message you are the person to confirm the Pts identity, so you do not need to change this part.

In the additional information section type in what photo ID has been seen e.g., passport, driving license, Pass Card.

once you have completed this press **save** to get to the next part.

The screenshot shows the 'Online user' application window after saving the information. The 'ID Verification' and 'Access' sections now have green checkmarks. The 'Verifications' section shows a table with one entry: 'Information confirmation' with a 'View' link and a date of '27-Feb-2023'. The 'Next' button at the bottom is circled in red.

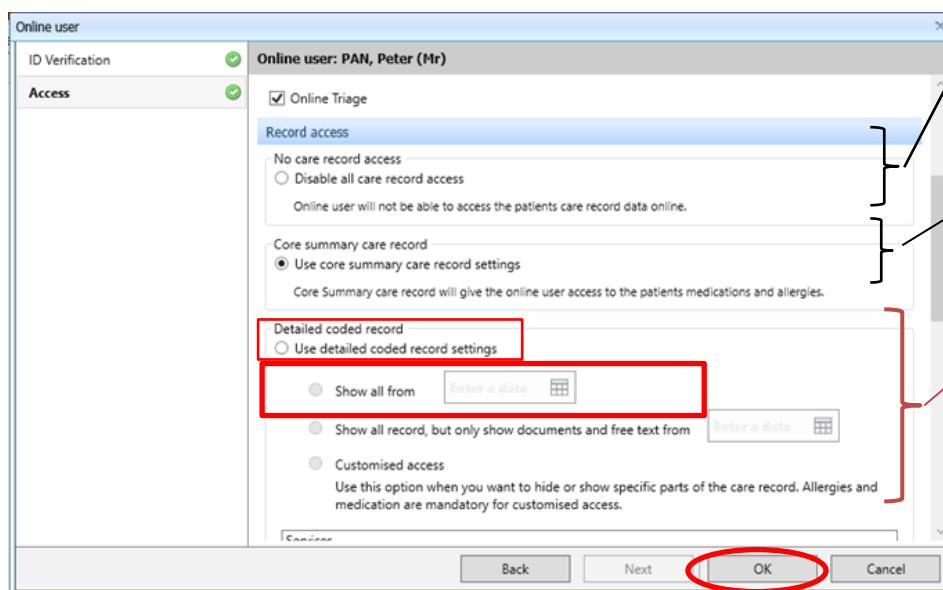
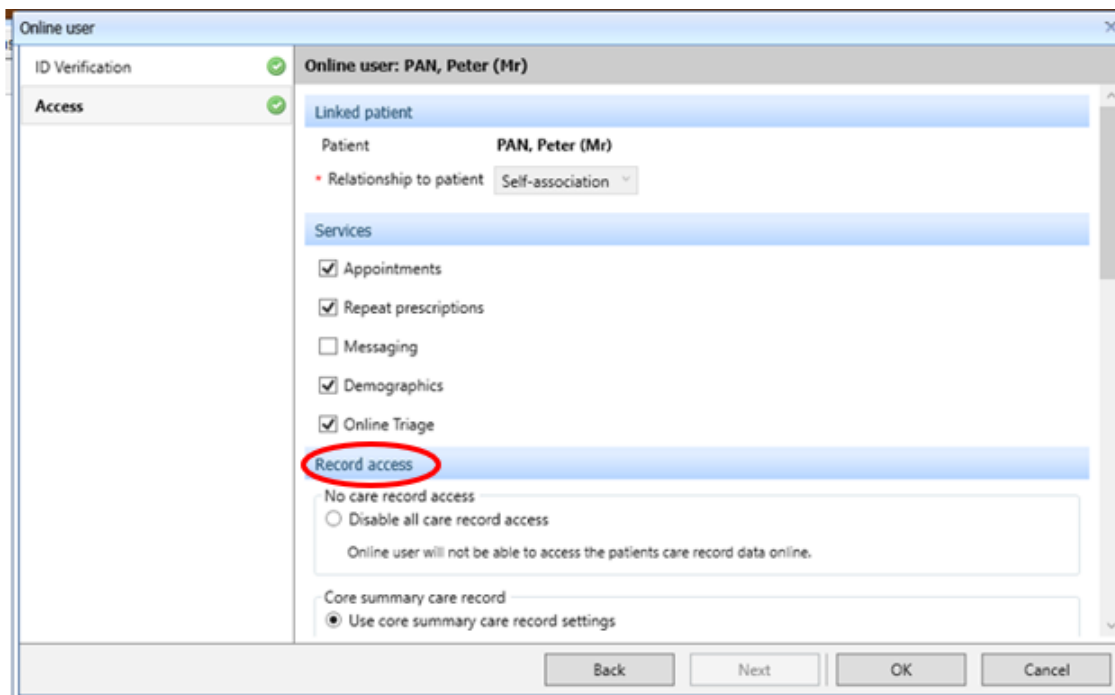
Method	Additional information	Document Type	Date
Information confirmation			27-Feb-2023

This is how the screen will come up after you have pressed save on the previous section.

Press **Next** to get to the next page Access.

Access:

When you get to this page you do not need to do anything except scroll down to Record Access.



No care record access: Does not allow the Pt to see any of their care record. **Do not use this one.**

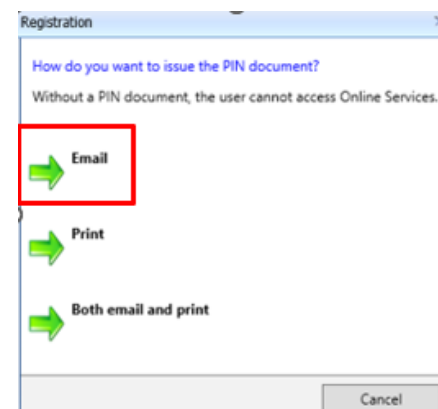
Core Summary record: Only gives access to the Pt's medications and allergies. **Do not use this one.**

Detailed Coded Record: **This is the one we use.**

For this part you need to select two things:

- Use detailed Coded record Settings.
- **Show all from.** The date we are using for this is the 31.10.23.

Once you have completed this press **OK**. This will bring up a pop up that allows you to email the Pt their pin to access online services. This is now complete.



Add Proxy User:

Once you have clicked add proxy user you will need to do the online user trace. Type in the family name, given name and gender (from the drop-down selection) and press **find**.

If they are an online user or one of our patients, it will show below.

Online user trace

Select an existing online user.

Trace criteria

Family name: mouse Given name: mickey Gender: Male Find

Date of birth: Enter a date Postcode: Account ID:

Online user (1) Local patients (1)

Name / Address	Account ID	Sex	Date of birth	Account Status
MOUSE, Mickey (Mr) Moon House, Cheese Lane, Hollywood. SL6 2LP	35102014136	Male	06-Aug-1972	Live

If you don't see the online user you're looking for, you can create a new account for them.

Link Cancel

If you find the online user, you are looking for click on them and then press **link**. If you do not, then **create a new account** for them. The create a new account will ask for their details e.g., name, gender, email address. Once you have pressed link or create a new account you will see the screen below.

Online user

ID Verification Access Legal basis

Online user: MOUSE, Mickey (Mr)

Verifications

Add a new identity document for this online user.

Add... Edit... Delete

Method	Additional information	Document Type	Date
Information confirmation auto setup		View	23-Dec-2021
Information confirmation testing information seen		View	28-Feb-2022
Information confirmation test		View	28-Feb-2022
Personal vouching test		View	15-Jan-2023

Back Next OK Cancel

If they are a new online user e.g., you just created their account, or they are one of our patients who does not use their own online services you will need photo ID. You do not need it scanned/saved onto the notes just documented that it has been seen in the consultations. **This is done the same way as adding the current patient's access by using the information conformation section.** Once you have completed that then you can press **next** to go to Access.

If they already have identity documents like MM then press **next** to go to Access.

Access:

Online user: MOUSE, Mickey (Mr)

Linked patient

Patient: PANL Peter (Mr)

Relationship to patient: Friend

Services

- ☒ Appointments Requested
- ☒ Repeat prescriptions Requested
- ☐ Messaging
- ☒ Demographics Requested
- ☒ Online Triage Requested

Record access

No care record access

☐ Disable all care record access

Online user will not be able to access the patients care record data online.

Core summary care record

☐ Use core summary care record settings

Core Summary care record will give the online user access to the patients medications and allergies.

Back Next OK Cancel

This is how it will look when you first go onto this page.

You will need to add the **relationship to patient** from one of the choices from the drop-down box. In this case MM is PP friend

The next thing you will need to do is the record access. To get there you just need to scroll down until it looks like this.

Online user: MOUSE, Mickey (Mr)

Record access

No care record access

☐ Disable all care record access

Online user will not be able to access the patients care record data online.

Core summary care record

☐ Use core summary care record settings

Core Summary care record will give the online user access to the patients medications and allergies.

Detailed coded record

☒ Use detailed coded record settings

☒ Show all from 31-Oct-2023

☐ Show all record, but only show documents and free text from Enter a date

☐ Customised access

Use this option when you want to hide or show specific parts of the care record. Allergies and medication are mandatory for customised access.

Services

- ☒ Allergies (Mandatory) Requested
- ☒ Medication (Mandatory) Requested

Back Next OK Cancel

This part is the same as adding online services to the Current Patient
Click the **detailed coded record** and click the **show all from** and add the date **31.10.23**.

Once this has been done press the **next** button to go to legal basis.

Legal Basis:

This is to ensure that we are legally allowed to give access to the Pt's (In this case Peter Pan) electronic record to the proxy user (in this case Mickey Mouse). **You must fill out this section for the proxy access to go through.** The page will look like this:

Online user: MOUSE, Mickey (Mr)

Legal basis

Access to the following services on PAN, Peter (Mr)'s account have been requested. Legal basis is needed for MOUSE, Mickey (Mr) to access these services.

- Appointments ☐ Allow access ☐ Reject ☒ Decide later
- Repeat prescriptions ☐ Allow access ☐ Reject ☒ Decide later
- Demographics ☐ Allow access ☐ Reject ☒ Decide later
- Online Triage ☐ Allow access ☐ Reject ☒ Decide later
- Detailed coded record ☐ Allow access ☐ Reject ☒ Decide later
 - Allergies
 - Medication
 - Laboratory test results
 - Immunisations
 - Problems

[What is legal basis?](#)

Previously added legal basis

Legal basis type	Method	Additional information	Date
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For the First Part you allow the proxy user access to the parts shown above by clicking the **allow access** boxes.

You will then need to press the **update legal basis** button. This will then allow us to explain why we are giving proxy access. Once pressed this page will come up:

Online user: MOUSE, Mickey (Mr)

Add legal basis

Legal basis options.

• Legal basis type

• Method

Date

The **legal basis type** is the reason we can legally give proxy access.

Method is the way we received the consent to allow proxy access.

• Legal basis type

• Method

The **Legal Basis type** will only come up with one option – **Explicit Consent**. This means we have consent (with proof) from the patient to allow proxy access. **Press the explicit consent from the drop-down box.**

Legal basis options.

* Legal basis type: Explicit consent

* Method: Verbal

Next Cancel

For **Method** it will come up with two options – **Written and Verbal**. We will be selecting **Verbal**. This is because with written we will have to add a document that we will scan on anyway. This avoids duplication of work.

Once this has been completed press **next** so it will take you to the page shown below:

Additional information

letter dated 28.02.23 received from pt consenting to MM having access to account

Previous Save Cancel

In this additional information box, you need to write in that we have received written consent from the patient to allow proxy access and the date. You can write it however you would like but we need to make sure it has we received a letter of written consent and what date is on the letter.

This letter will then need to be put into the scanning tray to be scanned. (Admin- Only needs to be filed onto Pt notes)

Once this is complete press **save**, it will take you to the page below.

Online user: HOUSE, Mickey (Mr)

Legal basis

No legal basis required.

Previously added legal basis

Legal basis type	Method	Additional information	Date
Explicit consent	Verbal	letter dated 28.02.23 received from pt con...	28-Feb-2023

Back Next OK Cancel

For this page all you need to do is press **OK** and send the Email for the PIN to the Proxy User.

Registration

How do you want to issue the PIN document?

Without a PIN document, the user cannot access Online Services.

Email

Print

Both email and print

Cancel

Once you have sent pressed **email** the Proxy user will receive the Pin to the Current Patients Online Services. This is now complete.