Online services: Getting started with online appointments
Guidance for general practice

Why get started with online booking of appointments?

Online booking offers patient empowerment and helps to fit health services around people’s lives. It is also a GMS contractual requirement for practices to offer patients the opportunity to book appointments online and from 1st April 2015, to routinely consider whether the proportion of appointments that can be booked online needs to be increased to meet the reasonable needs of their registered patients, and, if so, take such action accordingly.

For practices, who have not yet started offering an online appointment booking service, this introductory guide gives a general overview of online booking and helps with planning its introduction.

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 is a good initial step towards the introduction of other online services such as repeat prescriptions and messaging (See Getting started with records access guidance for general practice). 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.

The benefits for practices and patients

Benefits for practices
- Reduced telephone calls and surgery visits to make, cancel or re-schedule appointments
- Possible savings of staff time.

Benefits for patients
- Patients like the ease, convenience and control of making and managing their appointments online
- Patients report that they have found it easier to select their preferred GP
- Online services are available when the practice is closed or busy
- Apps for modular devices will make access to booking appointments easy and convenient.

Setting up patient online access for booking appointments

Key considerations in setting up the system include the following, which are explained in detail below:
- System configuration
- The roles and needs of staff
- Clear protocol for registering new patients to the system
- Promotion of the initiative to patients
- Barriers to use of online services
- Monitoring and problem solving
System configuration: Setting up patient online access for booking appointments

- Configure your computer system to accept online booking of appointments and set up the surgery sessions as required by your system. This should only take minutes. Your system supplier will have published guidance on how to do that in your system. Some system suppliers allow patients to book one appointment through the website and before registering for online services.
- Decide which members of the practice team should have online appointments. You may feel that initially you only wish to book GP slots.
- Decide the number of slots to be made available for online access, when they should be available and for whom. You can choose, for example, to make only routine appointments available online so that you retain control of booking into urgent slots. Decide whether only regular patients or all patients will be able to book online. Decide whether you will make online booking available to under 16s.
- 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.
- To provide equity, online appointments could be released at the same time slots are made available to patients booking by other means such as over the telephone.
- Slots available to book online 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.
- Online booking of nurse appointments will be simpler if they already run specific clinics such as for cervical smears or diabetes. Information for patients to highlight these clinics could be provided on the practice website.
- Consider the involvement of your patient participation group in designing the system.
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 briefings should include:
  - How the system works
  - How to help patients register
  - How to verify the identity of patients
  - How to support patients with sensory, intellectual or other needs such as limited IT literacy (the NHS Accessibility Information Standard (ISB 1605) is currently in development)
  - 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.

Staff briefings should be based on your system supplier’s guidance. System user groups will have helpful tips.

Clear protocol for registering new patients to the system

- Your system supplier will provide guidance on the registration and account activation process. This may include an SMS reminder option.
- 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 for general practice.
- Personal details of how to log in to the online service, including passwords must only be given to the patient themselves, except in specific circumstances (see “Special Circumstances” below for further guidance).
- Once the patient activates the account, the service can be used.
- Once your system is agreed, a registration checklist may help receptionists (Patient Online: Records Access Getting ready checklist | step-by-step guide).

Promotion of the initiative to patients

- The usual methods of promoting new practice services should be employed including 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 needs (e.g. visual difficulties, see below) or disabilities.
- 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.
**Barriers to use of online services**

- Patients may lack access to the internet or the skills or confidence to use the system. Organisations such as the Tinder Foundation are involved in the NHS programme of widening digital participation by individuals and through community working. The *Tinder Foundation* offers help to people with limited 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 practice training or problems with the computer system. Your system provider may offer guidance on this, for example on SMS or email reminders to activate the account.
- 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.

**Monitoring the system**

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.

**The roles and training needs of staff**
Special circumstances

Proxy access

This means access to online GP services by someone other than the patient, on their behalf. This may include people with parental responsibility for a child or carers. Please refer to Proxy access guidance for general practice.

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. The risk is low especially if the patient is only allowing access for booking appointments. However, there are particular risks of disclosure of an appointment booked or a prescription requested by a Fraser-competent young person. Please visit NSPCC Gillick competency and Fraser guidelines.

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. Staff members also need to be mindful of coercion of the patient (see below).

Coercion

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.

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 for general practice and e-learning module on coercion.

Further information and resources:

- Example registration form
- GMS contractual requirement
- Patient Online: The Road Map
- GMC Confidentiality Guidance
- BCS/NHS: Keeping your online health and social care records safe and secure
- NHS England Accessible Information Standard
- NSPCC Gillick competency and Fraser guidelines
- Tinder Foundation
- RCGP Guidance Documents
  - Coercion guidance for general practice
  - Getting started with records access guidance for general practice
  - Identity verification guidance for general practice
  - Proxy access guidance for general practice

Further reading:

- De Lusignan S, Mold F, Sheikh A et al. (BMJ Open 2014): Patients’ online access to their electronic health records and linked online services: a systematic interpretative review