

GP Online Services Guidance

*Online appointments and prescriptions*

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7. **Introduction**

In England patients can book and cancel appointments, request prescriptions and send simple messages to their practice. Practices are familiar with how these services work, but this guidance may be useful if you are looking to improve the way the practice offers these services or are new to working in general practice and want to know more about these GP online transactional services. It describes:

* 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-party to have access to the GP online services 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.

iRef: There is more information about third-party access to the patient’s record in the guidance on “Proxy Access” and “Children and Young People” in the Toolkit.

**Box 1: The benefits of online transactional services**

**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.

**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.
* The practice can respond at a suitable time, avoiding exchanges of missed calls.
1. **Online appointment system**

The steps to consider in planning and operating an online appointment service are:

1. **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. Training materials will be available from your IT system supplier.
2. **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.
3. **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 ringfence some slots and release them for online booking periodically.
4. **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.
5. **If you use a telephone triage or digital consultation system,** consider how they may affect the appointment slots that you need to make available online.
6. **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.
7. **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.
8. **Consider involving your patient participation group** in designing the system.
9. **Online prescription service**

The steps to consider in planning and operating an online prescription service are:

1. **Configure your computer system** to accept online repeat prescribing. Training materials will be available from your IT system supplier.
2. **Ensure that the new system complements existing services** and clinical workflows, including the electronic prescribing system. 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.
3. **Consider the involvement of your patient participation group** in designing the system.
4. **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.
5. **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.

Practice team members will need to understand how the online appointment, prescription and messaging system works and how it affects other practice services such as clinics, influenza vaccinations and medication reviews. They will have to be familiar with the following tasks as their roles require:

1. How to inform patients about using online services and help them register
2. How to verify the identity of patients
3. How to help patients keep their online access secure
4. How to support patients with sensory, intellectual or other needs such as limited IT literacy
5. How to identify a risk of coercion of the patient to allow someone to misuse their online access

i There is guidance on how to register patients for GP Online Services in the Toolkit section on “[Working with Automatic Record Access](https://elearning.rcgp.org.uk/pluginfile.php/179161/mod_book/chapter/764/Working%20with%20record%20access.docx)” and “[Coercion](https://elearning.rcgp.org.uk/pluginfile.php/179161/mod_book/chapter/782/Coercion.docx)” and a [template application form](https://elearning.rcgp.org.uk/pluginfile.php/179161/mod_book/chapter/767/RCGP%20Application%20Form.docx) for practices to adapt.

1. **Recognise and resolve barriers to the use of online services**
2. **Patients may lack access to the internet or the digital skills** to use the system. Organisations such as the Good Things Foundation (<https://www.goodthingsfoundation.org/areas-of-work/digital-inclusion>) 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 (<http://www.barclays.co.uk/digital-confidence/>)
3. **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.
4. **Problems with registration or account activation** may arise because of unsuccessful training by practice staff or problems with obtaining an NHS Login or suitable patient facing services app. 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 problems seem to lie with your computer system.
5. Monitor the system for successes and problems
6. **Keep a log of problems with the system** – encourage team members and patients to report problems and take action to fix them.
7. **Run periodic audits** 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.
8. **NHS Digital provides monthly figures** for uptake and use of GP Online Services nationally and at practice and CCG level. The information is available here - <https://digital.nhs.uk/data-and-information/data-collections-and-data-sets/data-collections/pomi>