Patient Services Registration User Guide

Version 2

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Patient Services - Registration User Guide

Introduction

Each of your patients' needs to register for an online account to get full access to all of the online services you have enabled.

Once you have registered a patient for online services, a registration letter is printed or emailed to the patient. Your patients must then go to the Patient Services website to complete their registration.

This guide explains how to register your patients for online services.

> 📒 **Note** - Patients need a valid email address to register for online services.

Creating a Patient Online Account

To create an online account for a patient:

1. From Registration , select the patient required.
2. Now select the Online Services tab.

3. From **Preferred Email Address**, select an existing email address or select **Add** , enter a new email address for the patient in **Contact**, tick **Verified** and then select **OK** to save and close (this email address is used to send confirmation and reminder messages to your patient).
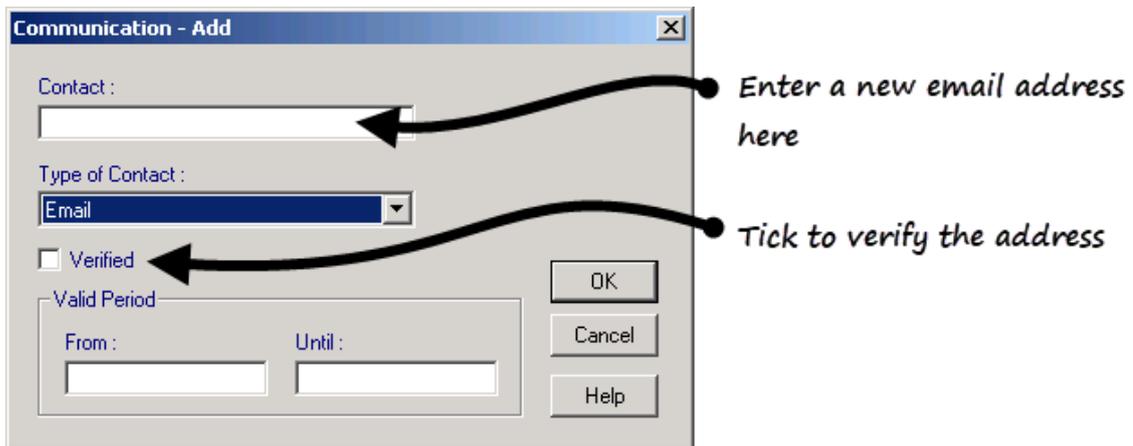
The patient is not required to have a recorded email address, however without a verified email recorded when you select **Create Online Account** the following message is displayed:

'*Without a preferred e-mail address, a Registered Online Service User will not be able to complete their online registration for the service. Do you still want to continue?*

Select:

– **Yes** to continue the online account creation, or

– **No** to return to the **Online Services** tab without creating an online account.

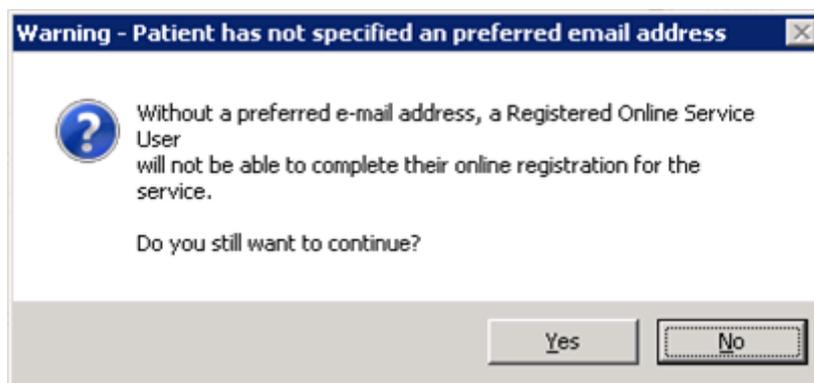🗀 **Note** - Patient Services does not send communications via email or SMS unless the communication details have been verified. If the patient has more than one email address, the contact that is displayed when you select **OK** is the contact used by Patient Services. This is known as the 'preferred' contact.

4. Choose or add a verified SMS Number. To add a mobile number select **Add** [Add], enter a new mobile number for the patient in **Contact**, tick **Verified** and then select **OK** to save and close (this mobile number is used to send confirmation and reminder messages to the patient).

Enter a new mobile number here

Tick to verify the address
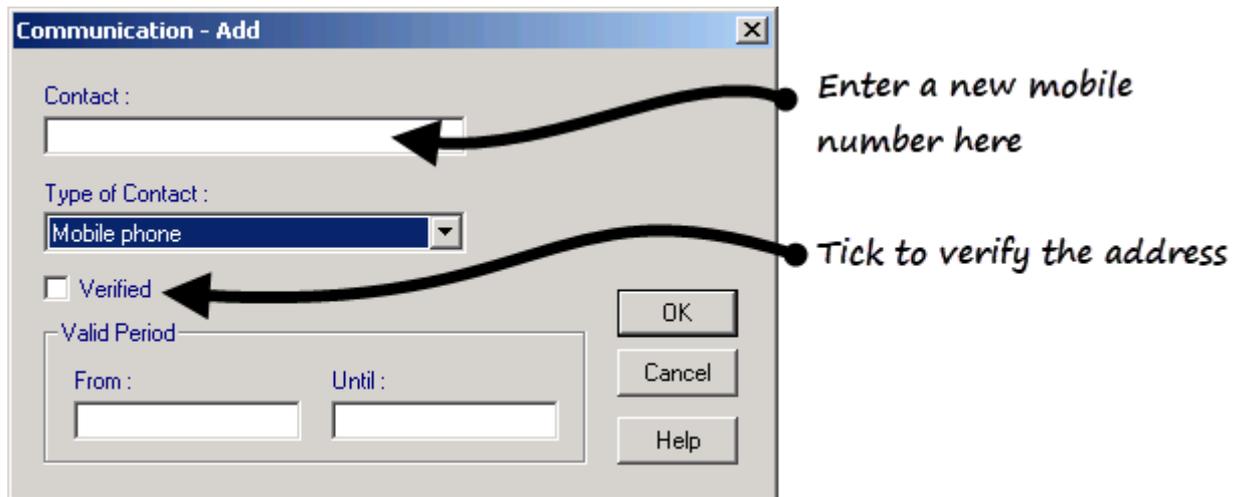
5. Select **Create Online Account**, Microsoft Word is launched with a letter containing the patient's Online Registration Details. The Registration Letter contains two sets of online registration details and should be kept by your patients ready for registration to the national Patient Facing Service.

6. Check the details, print out the letter and hand it to the patient. If there is a verified email address a pdf copy of the letter is also emailed to the patient.

7. The **Online Services** tab is updated to show that the account has been **Created**.
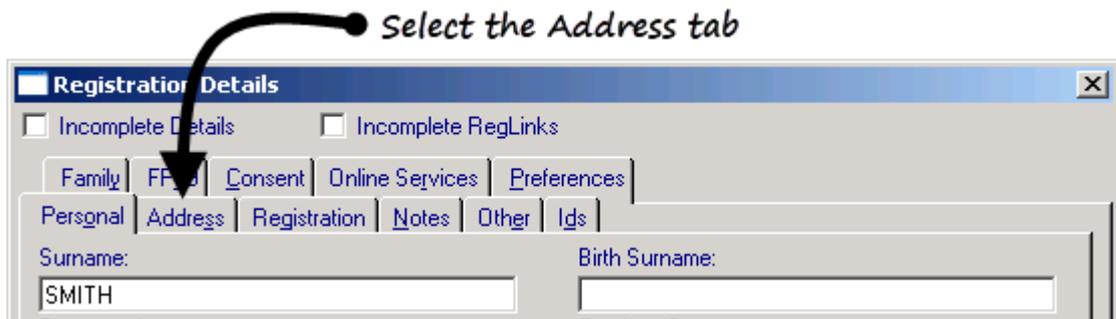

Created is indicated
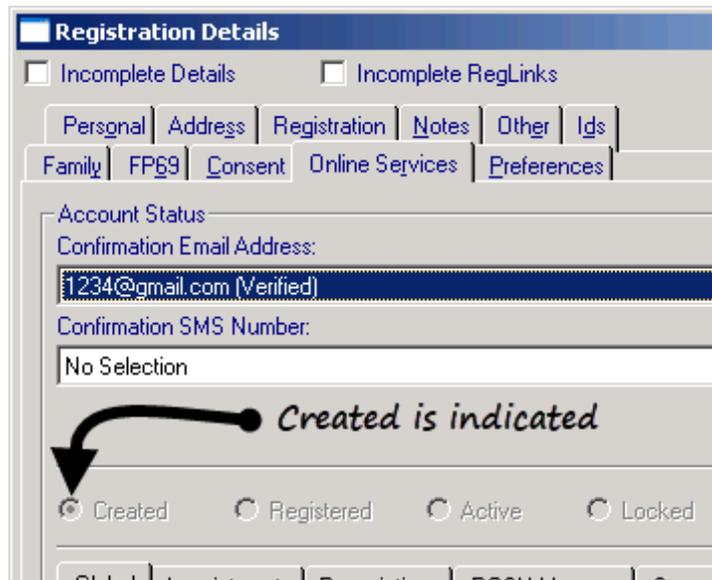
8. Select **OK** to close.

⚠ **Important** - Patients wanting to set up more than one account should be advised to use different email addresses due to potential breaches in confidentiality.

Adding Communication Details

1. From **Registration,** select the patient required and then select their **Address** tab.

Select the Address tab
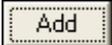
2. Select **Add** [Add] to add a contact for the patient. Contact details can be added to the main address, ie land line number, or as a contact for the patient, ie Mobile or email.

Select Add to add a contact
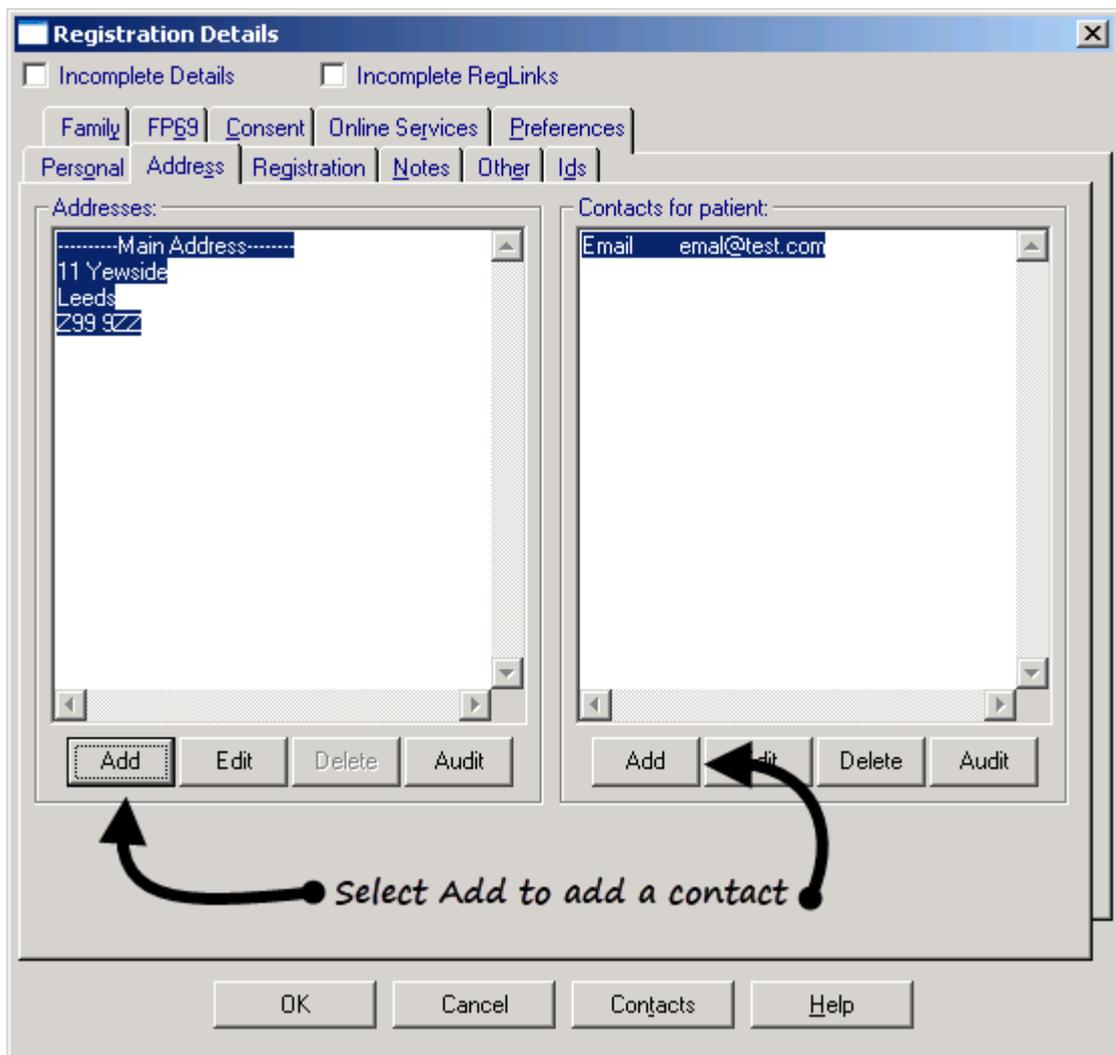
3. The **Communication - Add** screen is displayed

4. Complete as required:

- **Contact** - Enter the contact details, eg email address or mobile phone number.

- **Type of Contact -** Select the type of contact you are adding, eg Email or Mobile phone.

- **Verified** - Tick to confirm you have verified the details.

  🗁 **Note** – Communication details must be verified to enable email and SMS communication to the patient from the Patient Services website.

5. Select **OK** to save and then select **OK** again to close the patient **Registration** screen.

   🗁 **Note** – If, following Online Registration, the email address is removed; your patient is unable to log in.

Add Patient Identity Verification Details

When a patient asks to register for online services, you must ask them to provide a form of identification. Once viewed, you must record that you verified their identity on their patient record in both of the following ways:
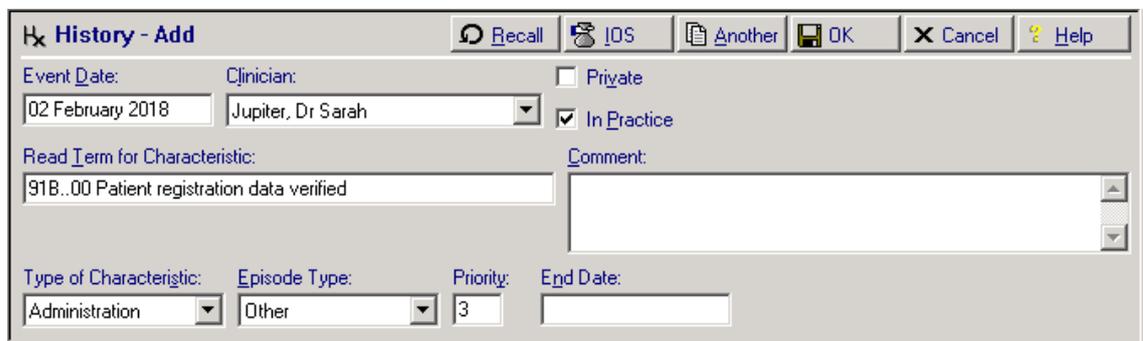
Record a patient registration data verified history entry

1. From **Consultation Manager** , select the patient required.

2. In **Read Term - Add**, type #91B and press enter.

3. 91B..00 Patient registration data verified is displayed, select **OK** to invoke the **History - Add** form.

4. On the **History - Add** form, add comments and change the **Priority** if your practice protocols dictate.

5. Select **OK** to save.

   📁 **Note** - You can add **91B.00 Patient registration data verified** if you can vouch for a patient who does not have documentation. You should record that the patient has been vouched for in the free text notes.

Record an Identification entry

Identification is a screen for recording the type of identification presented by the patient within Registration. If identification is not recorded it is not possible to complete the creation of the online account.

Select either:

- **Registration** , select the patient required, select **Online Services** tab and then select **Identification**.

or,

- **Consultation Manager** , select the patient required, select **List** and then **Identification**.

1. The **Identification Type** screen is displayed:

2. Select **Add** to add details.

3. The **Identification - Add** screen is displayed.

4. Complete as required:

- **Date** - Completes with today's date. Select to display a calendar and select the date the identification was presented if required.

- **Type** - Select from the available list:

    – **Personal Vouch**

    – **Information confirmation**

    – **Passport**

    – **Driving Licence**

    – **Birth Certificate**

    – **Bank Statement**

    – **Utility Bill**

    – **Other**

- **Staff** - Select the staff member that checked the identification from the available list, this initially defaults to the person currently logged in.

- **Freetext** - Enter any free text comments required.

□ **Note** - If a patient provides another form of ID in the future, rather than edit the existing information, you should add a new entry.

Registration Status of Patient's Online Account

There are four online account statuses within **Registration**, they are:

- **Created**
- **Registered**
- **Active**
- **Locked**

Online Account Created

When the patient has supplied their email address, the online account has been created in **Registration** and the **Registration Letter** generated and given to the patient, their status is shown as **Created**.
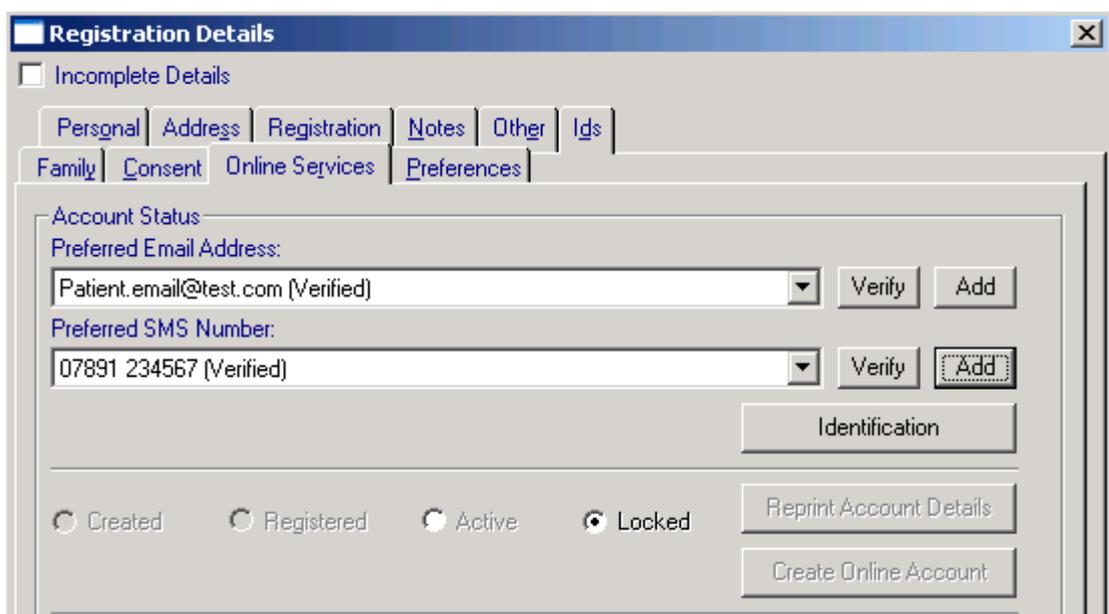
Online Account Registered

When the patient has completed the online registration process, creating a username and password, but not activating the account by confirming the email, the status is shown as **Registered.**

Online Account Active

When the patient has activated their online account by following the link in the confirmation email, the account status is shown as **Active**.

Online Account Locked

After 5 unsuccessful log in attempts the patient's online account is locked temporarily for 60 minutes. The patient's account status in **Registration Details – Online Services** is changed from **Active** to **Locked**:


> 📒 **Note** - After the 60 minute lock period, the patient's online account is unlocked automatically and the status changed back to **Active.** See Unlock User Account for instructions on how to unlock the patient's online account manually.

Unlock User Account

To unlock a patient's online account manually:

1. From **Registration**, select the patient required.

2. Select **Registration Details - Online Services** and select **Active** to unlock the patient's online account:

Click Active to unlock the patient's online account
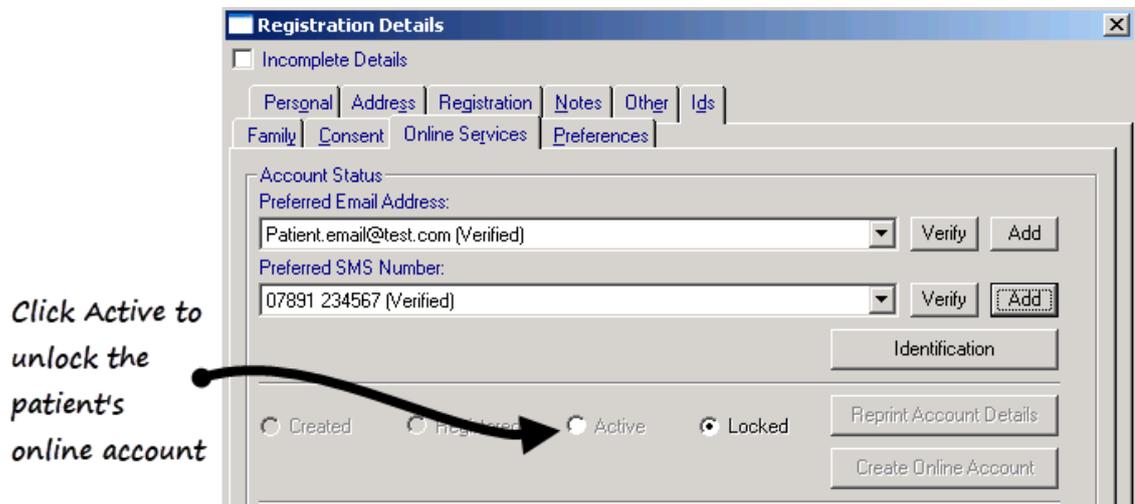
3. Now, select **OK** to save and close.

Disabling Online Services

You can disable a patient's online services globally or by specific module if:

- The patient chooses to opt out of online services or a specific module, or
- The service is being abused by the patient

Online Appointments functionality is disabled automatically for a patient if they exceed the practice's online DNA limit.

To disable a specific patient's access to all or a selection of online services:

1. From **Registration** , select the patient you require.
2. Select their **Online Services** tab.
3. Remove the tick from **Enabled** to disable the following:

- **Global –** This disables all services available to the Account. The patient is unable to log in.
- **Appointments -** This stops the patient being able to book appointments online.
- **Repeats -** This stops the patient being able to order repeat prescriptions online.
- **Acutes -** This stops the patient being able to order acute prescriptions online.
- **Patient Messaging** - This stops the patient being able to send messages to the surgery via their online account.
- **Summary Data (England and Wales Only)** - This stops the patient being able to view their summary data online.
- **Detailed Coded Record (England and Wales Only)** - This stops the patient being able to view their detailed coded medical record online.
- **Pharmacy Nomination - View** - This stops the patient being able to view their nominated pharmacy.
- **Pharmacy Nomination - Update (England only)** - This stops the patient being able to update their Electronic Prescription Service (EPS) nominated pharmacy.

If a service has been disabled, it is no longer visible when a patient logs in.

4. Select **OK**, to save and close.

Online DNA Limit Exceeded - Online Appointment Access Disabled

If you have opted to block online appointments for patients with over a certain number of Did Not Attend (DNA) appointments, when they exceed the limit the following is displayed:

- In **Registration - Online Services - Appointments** the tick is automatically removed from **Enabled** within the Appointments tab, *'User has exceeded the maximum number of DNAs allowed'* is automatically displayed in **Notes**.
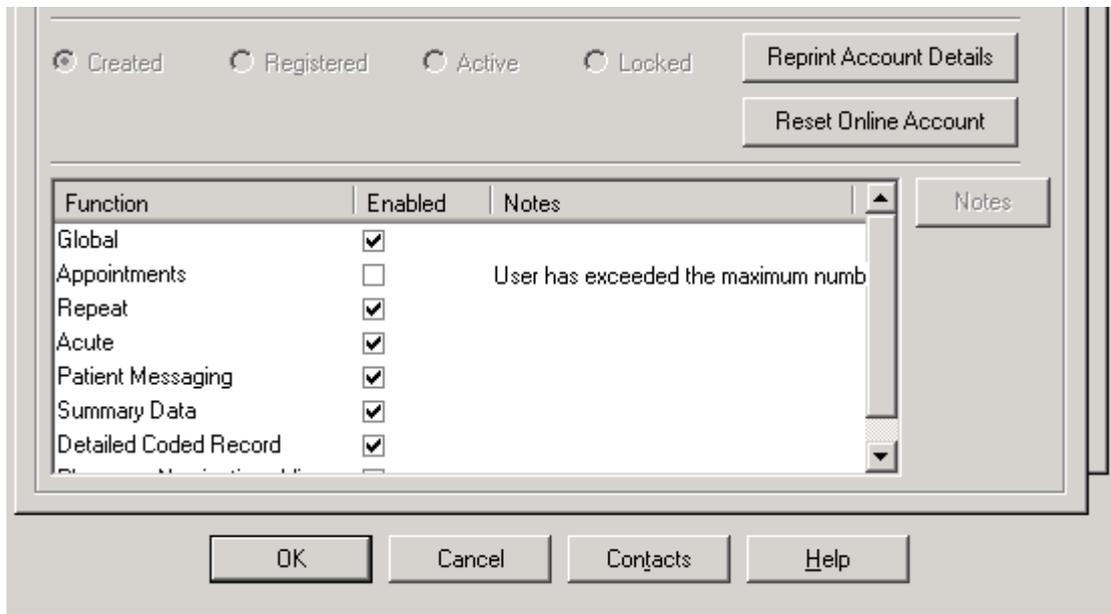

The next time the patient logs into Patient Services, links to Appointments are not displayed. The patient cannot access the Appointments module until their DNA numbers are outside of the criteria set in **Vision Online Services Appointments Configuration**, see *Did Not Attends* http://www.inpshelp.co.uk/DLM560/Control_Panel/index.htm#72563 for details.

Re-Enable Online Services

To re-enable an online service:

1. From **Registration** , select the patient and select the **Online Services** tab.

2. Tick **Enabled** for either **Global**, if all services have been disabled, or the specific service that has been disabled.

3. The **Online Services - Consent Type** screen is displayed:
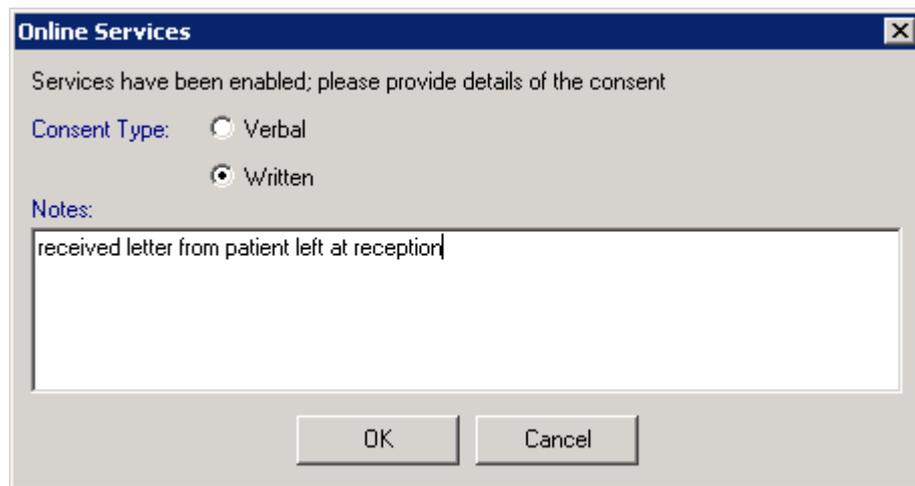

4. Select as appropriate to record either:

   - **Verbal** - For spoken consent
   - **Written** - For consent given in writing

5. Enter any free text comments in **Notes**.

6. Select **OK** to save and close.

   📒 **Note** - This creates an entry in the **Event Log**, not the patient record.

Re-Printing an Online Services Registration Letter

You can reprint an online services Registration Letter should your patient mislay their original:

1. From **Registration**, select the patient you require.

2. Select **Online Services**.

3. Now, select **Reprint Account Details**.
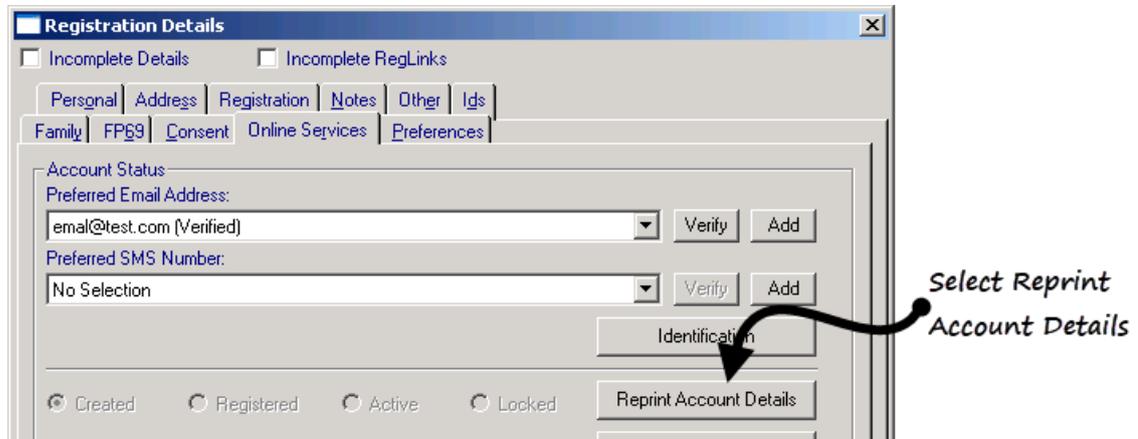
4. You are offered the methods of reprint, tick as required from:

   - **Open Registration Letter for Printing**

   - **Send Registration Letter content to preferred Email address**

5. Select **OK** to accept.

6. Print if appropriate.

7. Select **OK** to close.

Searching for Patients with an Online Account

You can create an ad-hoc search to identify patients with an online account. You can also filter by registration status.
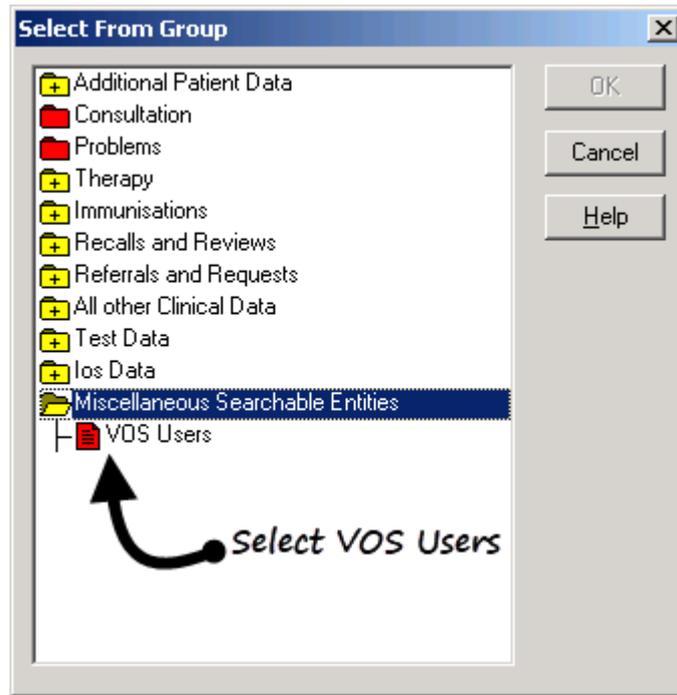
1. From the Vision front screen, select **Reporting - Search and Reports**

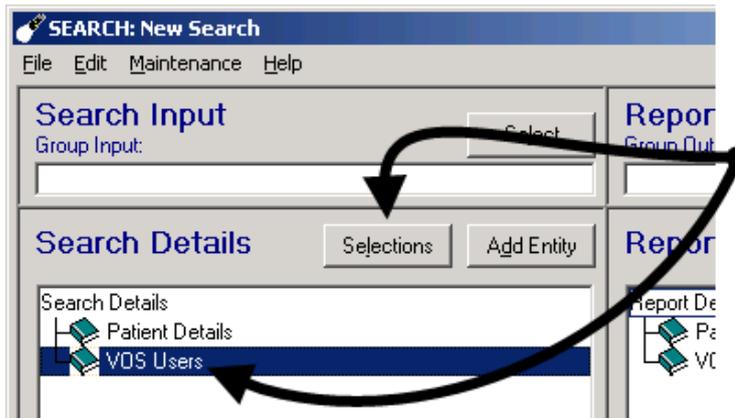**2.** Select **New Ad-Hoc Search** to open the ad-hoc search screen:

3. Select **Add Entity** above the **Search Details** panel to open the **Select from Group** screen:

4. Now, double click the **Miscellaneous Searchable Entities** folder and select
   VOS Users.

5. Select **OK**.

6. To select the criteria for your search, highlight **VOS Users** in **Search
   Details** and select **Selections.**

7. The **Criteria Select** screen is displayed, select your criteria using the
   following options:

   - **Inactive -** Select **Inactive = Yes** to find patients whose online account
     has been disabled.

   - **Input Operator -** A particular user(s) can be selected if required.

   - **VOS Registration Status** - Select from **Active**, **Created**, **Locked**,
     Registered.
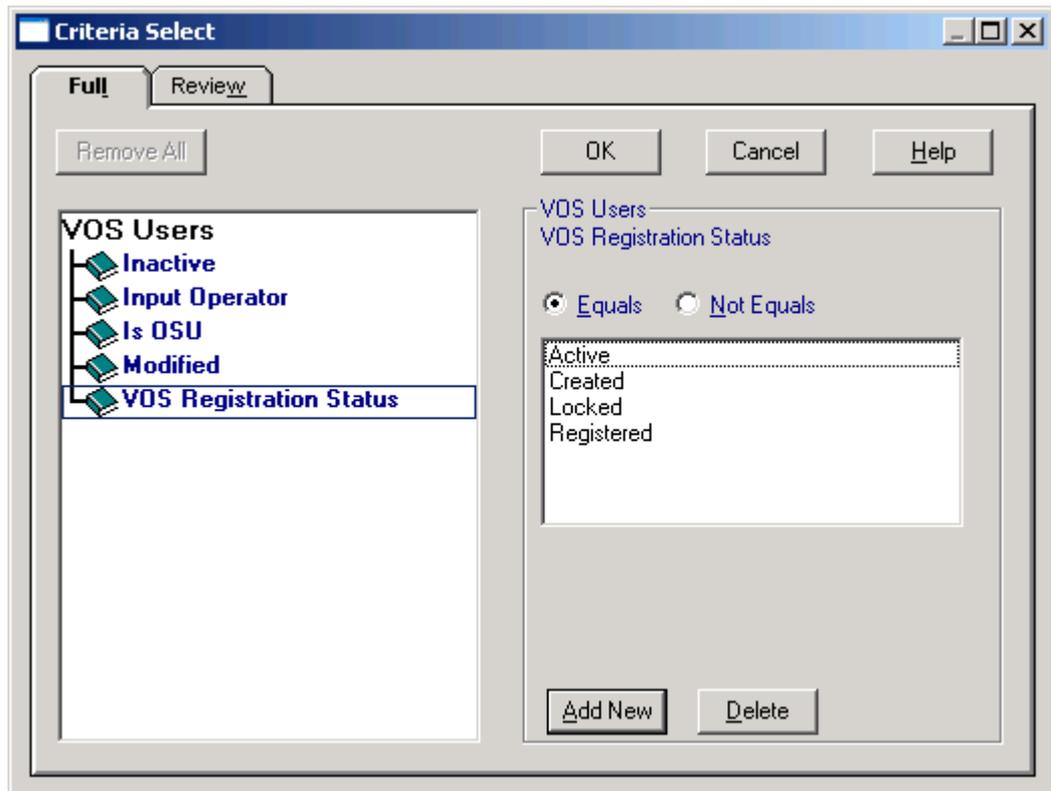
8. Select **Run** to display the search results.

Printing a Standard Report

1. Select **Standard Report** from the **Report Output** drop-down list.

Select Summary Report
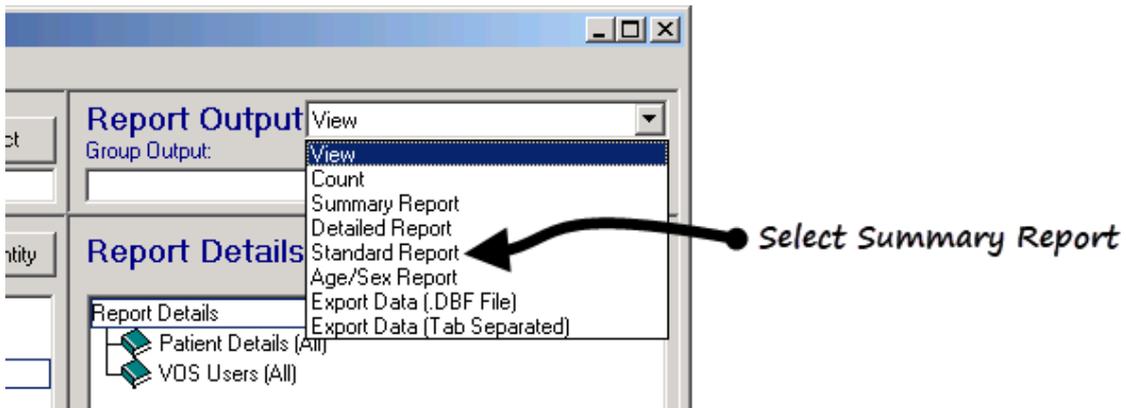
2. Now, select **Run** to create the report, or if the search has previously been run, select **File – Report on Last Search** which uses the previous run to produce the report.

3. Select **Print** to print.

Re-entered Online Patient Email Address

If a registered online patient's email address is not recorded in the system, they are asked to re-enter their email address when logging in to their online account. However, be vigilant when updating from the PDS mismatch screen that you do not unintentionally remove email addresses.

When the patient has re-entered their email address it is updated in the following two places:

- **Registration Details** - Online Services tab, in Confirmation Email Address
- **Contacts for patient** in the Address tab.

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