

**PATIENT ONLINE
SAFE ACCESS TO ONLINE
RECORDS CASE STUDY**



HOW TO IMPLEMENT

DETAILED CODED

RECORD ACCESS

Boughton Health Centre in Chester started offering detailed coded record access to their 12,500 patients in February 2015. With rigorous planning, a neat flow chart and regular training sessions, clinicians and admin staff all have a clear part to play in the process.



The project of getting the practice ready for detailed coded record access was driven by practice manager Rachel. "I got enthusiastic at a conference in the summer of 2014, after meeting Lynne Jones, a practice manager from Banbury who had been offering full record access for a while," Rachel says. "At first, not everybody at our practice was keen. This changed when we attended a presentation organised by our local CCG, where GP Amir Hannan from Tameside and one of his patients Ingrid Brindle talked about the benefits of online record access. Afterwards, even the most cautious of our partners changed his mind."

How to get started

"It took us a few weeks to get all our policies and procedures in place," Rachel says. In that time, the practice developed their documents, flow chart and marketing materials, trained all staff and liaised with their patient participation group, with whom they also trialled record access. "For any practice implementing record access now, this stage will be a lot easier as standard guidance and good practice examples are now freely available."



Here's how they did it:

Make the most of available guidance

"Talking to other practice managers that already had detailed record access in place, made it more manageable and achievable for myself," Rachel says. "They happily shared their information leaflets and other documentation, which gave me something to start with."

Rachel also consulted the available NHS England guidance in the [Support and Resources guide](#) as well as on the [RCGP's website](#). "This created a clear view of what was needed."

Agree on lead roles

"Establish roles and responsibilities within the entire practice team," Rachel says. "To make sure everything was working from a clinical perspective too, I felt it was important to have a GP IT lead involved."

GP Ed took up this responsibility. "I've been overseeing documentation that the management and administrative team have put together," he says. "I looked out for things that non-medical staff might

not notice, such as certain questions in the patient questionnaire (Appendix A). From a clinical point of view it's important to identify particularly vulnerable patients that may not be suited for record access."

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The practice designed a clear flow chart (Appendix B) describing every stage from the moment patients request access to their medical record to the moment this access is granted, or not. "We wanted to make sure that medical staff would not have an increase in their workload," Ed says. "GPs now get an electronic task when patients have asked for record access. We then have a look at their notes and check the codes. It is very straight-forward and with the system up and running, it has very little impact on actual GP work."



“It is very straight-forward and with the system up and running, it has very little impact on actual GP work”

Engage with your PPG

“We engaged early on with our patient participation group and talked about online record access during our PPG meetings,” Rachel says. “In December 2014 we also started a consultation with them. They helped us with the leaflets, the process, the consent form and the promotional materials to make sure our messages were on-point.”

The PPG members were also the first to test online record access, before Boughton Health Centre went live in February 2015. “Our PPG also contacted another PPG that was already familiar with online record access,” Rachel says. “This experience helped them promote online record access in the waiting room in the first weeks after we switched it on.”

Train your staff

In the run-up to the launch of detailed record access, all staff members were trained. “We had separate training sessions for the clinicians and for the admin team,” Rachel says. The clinical team trialled record access with test patients to master what to do and be aware of what patients would be able to see. Admin and reception staff got special training too. “As they are the ones engaging with the patients, it is important they fully understand detailed record access. Amongst other things, we established a ‘patient dialogue’.”

To keep staff updated, the practice has regular coffee mornings and feedback sessions where they discuss detailed coded record access. “We also have regular refresher training sessions with the clinicians to raise awareness of promoting online GP services to patients at every opportunity, particularly to patients in their long term condition’s review appointment,” Rachel says.



The workload and benefits

“When we started offering access to detailed coded records, we had a lot of interest from patients,” Rachel says. The requests spiked the two first months with just over 100 patients asking for it. “Because of the initial interest it took us a bit longer than 21 days before we were able to grant access,” Rachel says. The practice now has a monthly average of 37 patients asking for online record access. “We inform patients they will have access in about two weeks’ time and why it will take this time, which they find acceptable. It’s important to agree on a realistic turn-around.”

There is currently no contractual obligation to respond within a particular timeframe. However, it should be without undue delay. Subject to this being formalised, NHS England’s view would take this to mean no longer than 21 calendar days from the date of the patient requesting online record access to this being granted by the practice.

The time and effort spent at the beginning of the process pays off. “We have not had

any issues with online record access,” GP Ed says. “Our leaflet, questionnaire and flow chart seem to work well.” When it comes to workload now, staff do notice a difference. “Online record access doesn’t seem to have increased our workload,” Ed says. “It has helped reduce telephone demand and appointments. If patients with record access come to see me now, they already know what they want to talk about which makes our consultations more efficient.” Reception staff also report less calls to the practice for test results and lots of repeat prescriptions ordered online.

To help patients even further with their online care, the practice made sure their website contained all the latest information and verified links.

“We’ve also added a jargon buster to our website so that it will assist patients in understanding medical terminology and abbreviations,” Rachel says. “As a practice, we’ve always placed a focus on self-help/care so for us, online record access was the next natural step.”

About the practice

Boughton Health Centre is a large practice in Chester, where 7 GPs and 9 nurses look after 12,500 patients. More than 6 years ago, the practice started offering online services and since February 2015, patients can request to see their full online GP records. Just over 3,000 patients are signed up for online services and almost 500 can view their records online.

APPENDIX A

Patient leaflet created by Boughton Health Centre
and handed to all patients requesting online access to their medical records

Patient Access has been in use in the surgery for some years now and many of our patients are happily using it to book appointments and order repeat prescriptions over the internet.

We have extended the facilities offered using this system so that patients may view their electronic medical records through Patient Access.

When registering for this access, 2 forms of documentation must be provided as evidence of identity. One of these must contain a photo and the other your address.

Q. What will I be able to see?

- Results e.g. blood pressure, blood tests, records of X-rays
- Vaccinations and immunisations

- Medications
- Letters to and from the doctor
- Allergies, active problems
- Consultations
- Examination dates, investigations and outcomes

Q. Can I alter the record?

No. This is a 'read only' facility. You can however, print off details to take to e.g. a hospital appointment. If you think that there is something that needs to be changed, you will need to contact the surgery.

Q. What are the advantages for me?

- If you are waiting for results you will see them as soon as they are added to your record and you will not have to ring the surgery.
- You can look up your list of immunisations

- You will be able to view your record at home, overseas, in hospital as an in- or out-patient (e.g. to share with hospital staff), or whenever you want access and have an internet connection.

Q. Is it secure?

- Yes, it will be your responsibility to keep your login details and password safe and secure.
- If you know or suspect that your record has been accessed by someone that you have not agreed should see it, then you should change your password immediately.
- If you can't do this for some reason, we recommend that you contact the practice so that they can remove online access until you are able to reset your password.

- If you print out any information from your record, it is also your responsibility to keep this secure. If you are at all worried about keeping printed copies safe, we recommend that you do not make copies at all.

Q. Can you turn it off?

Yes. As with the current arrangement, we can turn off the access in part or altogether.

Q. Where can I get more information?

More information can be found at www.boughtonhealthcentre.co.uk or you can email the surgery with your questions on boughton.healthcentre@nhs.net and we will respond as soon as possible. Please do not ring the surgery as this will block the telephone lines for patients who may have urgent medical problems.

Things To Consider

Forgotten history – There may be something you have forgotten about in your record that you might find upsetting.

Abnormal results or bad news – When viewing test results or letters, you may see something that you find upsetting. This may occur before you have spoken to

your doctor or while the surgery is closed and you cannot contact them.

Choosing to share your information with someone – It's up to you whether or not you share your information with others – perhaps family members or carers. It's your choice, but also your responsibility to keep the information safe and secure.

Coercion – If you think you may be pressured into revealing details from your patient record to someone else against your will, it is best that you do not register for access at this time.

Misunderstood information – Your medical record is designed to be used by clinical professionals to ensure that you receive the best possible care. Some of the information within

your medical record may be highly technical, written by specialists and not easily understood. If you require further clarification, please contact the surgery for a clearer explanation.

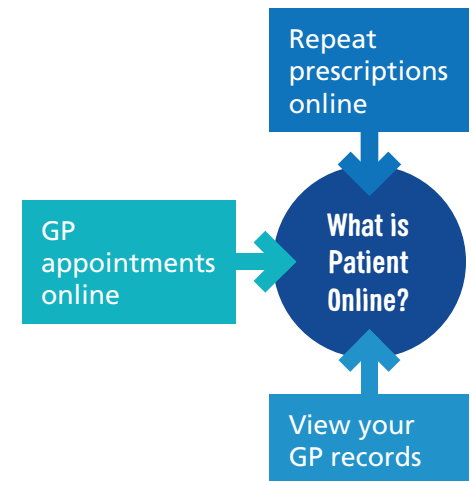
Information about someone else – If you spot something in the record that is not about you or notice any other errors, please log out of the system immediately and contact the practice as soon as possible.



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Patient Access Patient Leaflet



APPENDIX B

Online record access flow chart,
created by and used at Boughton Health Centre (Chester), which is an EMIS practice

