

Thaxted Surgery Policy and SOP Activating Patient Access for Patients

1. Introduction

Background

Thaxted Surgery have long provided on-line access to order medication and make appointments using EMIS's "Patient Access", linked from the surgery website. However, since 1 April 2015 all GP practices in England have to provide online access to much more of the patients' medical records.

"Patient Access" has been developed extensively to support this requirement, and now provides much greater functionality, and can allow patients to access information about:

- Medication – acute and repeat
- Immunisations
- Allergies
- Documents (e.g. clinic letters from hospitals)
- Test Results
- Consultations and other coded information.

The surgery can choose which of these aspects to activate.

The purpose of this document is to set out our policy about:

- what aspects of the patient medical record we will make available to patients under "Patient Access",
- what controls we will use to safeguard patient confidentiality

Version Information

This version, version 1, is effective October 2015.

Responsibility & Applicability

This SOP applies predominantly to reception and administration staff, including medical secretaries. However, all staff occasionally book appointments and should have an awareness.

All staff are responsible for any judgement they make about urgency or necessity regarding communications, and where there is any doubt, they are responsible asking a clinician, or the practice manager.

This policy has been developed in consultation with our Patient Participation Group.

2. Guiding Principles

The following are the guiding principles we have used to determine our policy

There is a clear patient desire for on-line access. Nationally, 59% agree that they would be interested in accessing their medical records online. We fully support this, and can see the benefits for both patients and ourselves if patients can access information directly, 24/7, rather than contacting the surgery.

However, there are significant risks that need to be managed, in particular:

- Maintaining patient confidentiality, verifying identity and getting appropriate consent
 - Ensuring access is not inappropriately granted to friends and family, but only to the patient themselves

Signed off by: Sara Carruthers, Practice Manager

Version 1. Effective August 2015.

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- Ensuring patients understand the risks of inadvertently passing on access by sharing and/or storing passwords
 - Access for under 16s
 - Access for patients who lack capacity
- Making sure that patients are able to understand and use their information safely, appropriately and effectively, and do not:
 - receive distressing news in an inappropriate and inhumane manner.
 - discover information likely to cause serious harm to themselves or anyone else
 - discover information about another person who does not consent.

3. Policy Statement

What we will make available

Thaxted surgery currently makes the following aspects of patient records available to patients through EMIS patient access:

- Current Medication – including acute, as well as repeats
- Immunisation
- Allergies
- Documents

At this point, we have not made test results available online. This is because test results are multi-faceted and complex, and can unduly worry patients in the absence of a clinician who can contextualise and interpret them. Should a patient wish to know test results, they are welcome to ring the surgery, where a receptionist will either give them the results directly (if the GP has reviewed them and noted that the patient can be told), or message a GP to call the patient.

Process and checks

Thaxted surgery will validate each patient's identity before switching on any access to medical records for that patient. The patient must present in person, and show the receptionist:

- a passport or driving license
- one other form of address identification – bank statement, tax statement or utility bill less than 3 months old

The receptionist will

- verify that the photograph is recognisably the patient
- verify that the name, date of birth and address matches the patient record

Once satisfied, the receptionist will give the patient a handout sheet (appendix 1) explaining the importance of keeping PIN numbers private.

The receptionist can then switch on the relevant access immediately.

Where the patient is new to patient access, switching on access will result in a pin number and access instructions being printed. The pin number must be handed to the patient directly and immediately, and **not** sent by post or handed to any 3rd party, friend or family member.

Under 16s

Parents and legal guardians of children 12 and under may request limited on-line access for their children in order to:

- book appointments

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- order repeat medication

They will **not** be given access to wider medical records.

Receptionists need to be alert to potential issues around who has parental authority, and, if in any doubt, defer to the doctor or practice manager.

Patients aged 16 and over must request access in their own right, as per an adult. Access will not be granted to parents.

Patients over 12 and under 16 represent a difficult area. While it is clearly convenient and appropriate for some parents to order medication and make appointments on their children's behalf, there are other cases where a "Fraser Competent" child has a confidential relationship with the GP in their own right, and that confidentiality must be guarded. We therefore will not provide access for 12 to 16 year olds – either to the parent, or to the child themselves.

Patients lacking capacity

Where patients lack capacity, access can be granted to an individual with appropriate Legal Power of Attorney. This must be discussed with the practice manager

Patients with Carers

Where patients have carers, they understandably may feel that it is convenient for the carer to be able to access their medical record for various reasons, including:

- booking appointments
- ordering repeat medication
- providing information to (e.g.) the ambulance service and other health and social care professionals in a crisis.

However, the risk to patient confidentiality is too high. Professional carers move on, and the patient may not have a strong understanding of technology and may not close down the access etc. For these reasons, we will not give access to anyone other than the patient themselves, and we will strongly recommend that the patient does not pass on their passwords to carers or anyone else.

Useful references

<http://www.medicalprotection.org/docs/default-source/pdfs/Booklet-PDFs/onlinemedrecordsbooklet.pdf>

<http://www.england.nhs.uk/wp-content/uploads/2014/10/npo-guidance-291014.pdf>