



# Patient Login – Quick-start Guide (Admin)

Version 0.1

# Introduction

## About Patient Login

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**Patient Login** is a new feature within GP Fusion, which allows practices to provide patients with a personalised experience of their website.

The feature was developed in response to the 2013-2014 DES, which requires practices to establish patient online access to practice information systems through enabling and utilising electronic communications for booking/cancelling of appointments and ordering repeat prescriptions, and register patients for online access by issuing passwords and using verification processes.

Patient Login enables practices to invite patients to register for enhanced online services by issuing them with a PIN (which is not personally identifiable) and an activation code. Practices can then opt to restrict the availability of online forms (including appointment booking and repeat prescription ordering) to registered patients only.

This document is intended as a quick-start guide to get practices up and running with Patient Login Admin. A separate user guide is available for patient users, but practices are expected to assume responsibility for any day-to-day support requests arising from patients using the service.

## What are the benefits?

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Patient Login offers a variety of benefits to both practices and patients:

### Benefits to Practices

- Compliance with the 2013-2014 DES and the associated financial rewards.
- Ability to offer patients a personalised experience of the practice website with a variety of time-saving features.
- Ability to verify that only genuine registered patients can register.
- Assurance that no patient identifiable information is stored in plain text - all form details are encrypted using an encryption key based on the user's password.
- Ability to restrict the availability of online forms to Patient Login users only.

### Benefits to Patients

Ability to:

- Capture Patient Profile information for the entire family, which can be used to pre-populate online forms,
- Capture details of frequently used medications, which can auto-populate repeat prescription request forms,
- Set repeat prescription email reminders for specific dates,
- Access restricted content relating to any groups they belong to, such as the PRG.

# Getting Started

## Enabling Patient Login

Patient Login is an optional feature and will only become available within your website once you have signed up to use it. To do this, sign into your website's Administration area and click 'Patient Login' in the Administration menu, followed by 'Enable Patient Login'.

You will be presented with further information about how Patient Login works along with a privacy policy, which you will need to agree to by clicking the check boxes. You will then need to confirm that you wish to enable Patient Login, provide your name and click 'Sign Up'.

### Step 3: Enable Patient Login Facilities

Do you wish to enable Patient Login?

Name of person signing agreement

For audit purposes, please confirm the name of the person signing this agreement.

[Back](#) [Sign Up](#)

This action will trigger an email notification to GP Fusion technical Support stating that you have signed up to use Patient Login. Having enabled the feature, you will be able to:

- Access the Patient Login online help guide
- Create, view and remove patient accounts
- Restrict the availability of online forms to those with Patient Login accounts only
- Manage patient groups – e.g. assigning patients to a particular group such as the PRG and restricting certain content to members of that group
- View statistics and reports on Patient Login activity
- View audit logs of all significant events for each patient, including account removal
- Disable the feature.

# Configuration

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The 'Configuration' section area within Patient Login Admin allows you to restrict the availability of all online forms used within your practice website to those with Patient Log-in accounts only.

To restrict access, click the 'Configuration' button and select 'Yes' using the first drop-down box.

[Patient Login Management »](#)

## Configuration

Here you can change various settings related to Patient Login.

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### 1 Online Form Availability

Allow Online Forms only for Patient Login accounts?

If yes is chosen, online forms will only be available to patients signed in with a Patient PIN.

Show alternative explanatory message?

If the patient is not logged in, a default message will be shown explaining a Patient Login account is required. This message can be overridden with alternative text, if required.

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[Save Form Availability Settings](#)

Once the settings have been saved, any website visitors attempting to access online forms whilst not signed in to Patient Login will be shown a standard message explaining that online forms are only available to Patient Login users, along with a brief description of the benefits of using the feature.

To edit this message, select 'Yes' using the second drop-down box and type your alternative text in the box provided. Click 'Save Form Availability Settings' to apply your changes.

# Managing Patient Accounts

## Creating New Accounts

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To set up a new Patient Login account, click 'Manage Patient Accounts' in the Admin area, followed by 'Invite Patient' on the Patient Index screen.

[Patient Login Management](#) »

### Patient Index



Here, you can view, create, edit and remove patient accounts:

- To create a new patient account, click 'Invite Patient'.
- To edit existing accounts, click on the blue arrow next to the patient's PIN in the grid below.
- To retrieve a patient's account details using their PIN or email address; click 'Show Search'.

#### Patient Logins

Click 'Invite Patient' to create a new Patient Login.

Invite Patient

Show Search

You will then need to enter and confirm a valid email address for the patient and click 'Create Invitation':

[Patient Login Management](#) » [Patient Index](#) »

### Invite Patient



Please provide a valid e-mail address for the Patient.

A **Patient PIN** and **activation code** will then be created, which can be used by the Patient to register.

An automated e-mail will be sent to the Patient with instructions, but the information can also be printed out and handed to the Patient once the invitation record has been created.

The Patient will have 14 days to register, after which a new Patient PIN will need to be created.

#### Patient Contact Details

Patient e-mail address

Confirm patient e-mail address

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Create Invitation

A PIN and activation code will be automatically created for the patient and emailed to the address they have supplied, along with a set of activation instructions. This information can also be printed and handed to the patient after creating the invitation record by clicking 'Print Patient PIN Details' on the Invite Patient screen.

The patient will be given a period of two weeks to activate their account before the account details are deleted and a new invitation record will need to be created.

Once a patient invitation record has been created, it will appear in the 'Patient Logins' table on the Patient Index screen. This also displays details of the account status (whether it has been activated by the patient or is still pending activation), any groups the patient is a member of (e.g. the Patient Reference Group) and any profiles the patient has set up within their account:

[Patient Login Management](#) »

## Patient Index



Here, you can view, create, edit and remove patient accounts:

- To create a new patient account, click 'Invite Patient'.
- To edit existing accounts, click on the blue arrow next to the patient's PIN in the grid below.
- To retrieve a patient's account details using their PIN or email address; click 'Show Search'.

Patient Logins				<a href="#">Invite Patient</a>	<a href="#">Show Search</a>
Click 'Invite Patient' to create a new Patient Login.					
Patient PIN	Status	Group[s]	Profiles		
<a href="#">07551484</a>	Active	-	-	<a href="#">→</a>	
<a href="#">17285248</a>	Active	Test Group 2	-	<a href="#">→</a>	
<a href="#">17766150</a>	Active	-	2 patient profiles	<a href="#">→</a>	
<a href="#">27688887</a>	Active	-	-	<a href="#">→</a>	
<a href="#">41372413</a>	Pending <i>14 day(s) left to register</i>	-	-	<a href="#">→</a>	
<a href="#">42487456</a>	Active	-	-	<a href="#">→</a>	
<a href="#">61614633</a>	Pending <i>-17 day(s) left to register</i>	-	-	<a href="#">→</a>	
<a href="#">70366671</a>	Active	-	-	<a href="#">→</a>	
<a href="#">74848167</a>	Active	-	-	<a href="#">→</a>	
<a href="#">82643030</a>	Active	-	-	<a href="#">→</a>	

1 2

## Viewing Patient Details

To view details of an individual patient's account, click on the blue arrow alongside their PIN in the right-hand column of the 'Patient Logins' table:

Patient Logins				<a href="#">Invite Patient</a>	<a href="#">Show Search</a>
Patient PIN	Status	Group[s]	Profiles		
<a href="#">07551484</a>	Active	-	-	<a href="#">→</a>	
<a href="#">17285248</a>	Active	Test Group 2	-	<a href="#">→</a>	

In addition to the details displayed in the Patient Index, the 'Patient Details' screen provides the date the PIN was activated and the account last used, the number of medications and repeat prescriptions captured and the number of forms and surveys submitted by that patient.

At the bottom of the Patient Details screen is a table displaying details of the patient's group membership. (See 'Managing Patient Groups' for further information on group membership).

[Patient Login Management](#) » [Patient Index](#) »

### Patient Details

#### Patient PIN

Patient PIN	07551484
Account Status	Active
Date PIN Activated	11 Jul 2013
Date Account Last Used	20 Aug 2013 23:51
Patient Group(s)	Asthma Group

#### Patient Profile Details

# Patient Profile(s)	0 patient profiles
# Medications Captured	0 medications
# Repeat Prescription Reminders Captured	0 reminders
Form(s) submitted	1
Survey(s) submitted	0

[Home](#)

[Delete Patient](#)

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## Deleting Patient Accounts

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To delete a patient's account, click on the blue arrow alongside their details in the Patient Index and click 'Delete Patient' under the Patient Profile Details. You will be prompted to confirm the removal of the account.

## Retrieving Patients' Account Details

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If a patient has mislaid their account details, you can retrieve them using either their PIN or their registered email address.

*(N.B. if both the PIN and email address are mislaid you will need to create a new account for the patient – the existing account will be automatically deleted after 6 months).*

To retrieve account details, click 'Show Search' at the top of the Patient Index table:

Patient Logins				Invite Patient	Show Search
Click 'Invite Patient' to create a new Patient Login.					
Patient PIN	Status	Group[s]	Profiles		
<a href="#">07551484</a>	Active	-	-		<a href="#">→</a>
<a href="#">17285248</a>	Active	Test Group 2	-		<a href="#">→</a>

Enter the PIN, email address and/or select whether or not the account has been activated, then click 'Search'.

*(N.B. you will need to enter the PIN and/or email address in their entirety for search results to be returned).*

Patient Logins				Invite Patient	Hide Search
Click 'Invite Patient' to create a new Patient Login.					
Patient Pin	<input type="text"/>	Email	<input type="text"/>	Search	Clear
Activated?	<input type="text"/>				



# Managing Patient Groups


Patient Login allows you to set up 'Patient Groups' such as a Patient Reference Group, and restrict certain areas of your website's content to members of that group only.

## Creating New Groups



To set up a new patient group, click 'Manage Patient Groups' followed by 'Create Group' in the Patient Group Index.

[Patient Login Management](#) »

### Patient Group Index

 Here, you can create patient user groups (e.g. Patient Reference Group) and restrict certain content to members of that group.

- To create a Group, click 'Create Group'.
- To change details of a Group, click on the group name in the list below.

Patient Groups			<a href="#">Create Group</a>	<a href="#">Show Search</a>
 To add a new Group, click 'Create Group'.				
Group Name	# Patients	# Permissions		
<a href="#">Patient Reference Group</a>	0 member(s)	0		

Enter a name for the group on the Group Details screen and click 'Save Group'.

[Patient Login Management](#) » [Patient Group Index](#) »

### Patient Group Details

Group Details

Group Name

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[Save Group](#)


Having saved the new group, a table will appear listing all Patient Login users and indicating whether they are members of the group:














Group Membership		Restricted Resources	
Group Membership			Show Search
Patient PIN	Status	Is Member?	
07551484	Active	✘ Not a member.	<a href="#">Toggle Membership</a>
17285248	Active	✘ Not a member.	<a href="#">Toggle Membership</a>
17766150	Active	✘ Not a member.	<a href="#">Toggle Membership</a>
27688887	Active	✘ Not a member.	<a href="#">Toggle Membership</a>
41372413	Not yet activated	✘ Not a member.	<a href="#">Toggle Membership</a>
42487456	Active	✘ Not a member.	<a href="#">Toggle Membership</a>
61614633	Not yet activated	✘ Not a member.	<a href="#">Toggle Membership</a>
70366671	Active	✘ Not a member.	<a href="#">Toggle Membership</a>
74848167	Active	✘ Not a member.	<a href="#">Toggle Membership</a>
82643030	Active	✘ Not a member.	<a href="#">Toggle Membership</a>
1	2		

To assign a patient to the group, click the ‘Toggle Membership’ link alongside the patient’s listing in the table.


A list of the content restricted to this group can be viewed by clicking on the ‘Restricted Resources’ tab.


## Restricting Content to a Group

To restrict any of your website’s content-managed pages to a particular user group, visit Manage Content/Manage Pages and click on the ‘Edit Item’ icon  alongside the name of the page you wish to restrict.

Content-managed pages			Add Page				
Use the icons to move, edit or remove pages.							
#	Name	Visible In Navigation?					
1	<a href="#">Home Visits</a>	<input checked="" type="checkbox"/> Shown in navigation					
2	<a href="#">Our Staff</a>	<input checked="" type="checkbox"/> Shown in navigation					
3	<a href="#">Clinics</a>	<input checked="" type="checkbox"/> Shown in navigation					

The 'User Group Visibility' table at the bottom of the page shows which groups currently have access to this page. To restrict access to a particular group only, click on 'Restrict Access' alongside the name of the group in the table. You will subsequently be able to remove access from that group and grant access to other groups.





 This data is visible to all users.

User Group Visibility			
Group Name	# Members	Access	
<a href="#">Asthma Group</a>	0	 Visible to all	<a href="#">Restrict Access</a>
<a href="#">Patient Reference Group</a>	0	 Visible to all	<a href="#">Restrict Access</a>





## Adding Members to a Group

To assign individual patients to particular user groups, visit Patient Login/Manage Patient Accounts, then click on the blue arrow alongside the patient's listing in the Patient Index.

The table at the bottom of the Patient Details page shows which groups the patient currently belongs to. To add the patient to a new group, click on the 'Toggle Membership' link alongside the group's listing in the table:

Group Membership <a href="#">Audit Log</a>		
Linked User Groups		<a href="#">Show Search</a>
Group Name	Linked?	
 <a href="#">Asthma Group</a>	 No - Patient is not member of group.	<a href="#">Toggle Membership</a>
 <a href="#">Patient Reference Group</a>	 No - Patient is not member of group.	<a href="#">Toggle Membership</a>

The table will then show that the patient has joined the group:

Group Membership <a href="#">Audit Log</a>		
Linked User Groups		<a href="#">Show Search</a>
Group Name	Linked?	
 <a href="#">Asthma Group</a>	 Yes - Patient is member of group.	<a href="#">Toggle Membership</a>
 <a href="#">Patient Reference Group</a>	 No - Patient is not member of group.	<a href="#">Toggle Membership</a>

# Statistics and audit logs

Patient Log-in allows you to obtain usage statistics and details of important interactions with the system at any time.

## Viewing statistics

Clicking 'Statistics' will present you with a summary of current Patient Login usage figures, including the number of:

- Active patient accounts
- Accounts requiring activation
- Accounts active in the last week, month, 3 months, 6 months and 12 months
- Active repeat prescription reminders
- Patient Profiles
- Patient Groups

## Using the Audit Log

Visiting 'Audit Log' will allow you to view details of all important interactions with the Patient Login system. Clicking on the magnifying glass icon alongside each listing will enable you to access more detailed information on each individual interaction.

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### Audit Log



Here, you can view details of all important interactions with the Patient Login system, including the nature of the interaction (e.g. 'patient signed in'), the date it occurred and the patient PIN if applicable.

Audit Log - 360 record(s)			Show Search
Date / Time	Event Type	Patient PIN	
19 Sep 2013 12:44	Patient - Activation code sent by e-mail	41372413	
19 Sep 2013 12:44	Admin - Patient Invited to Register	41372413	
19 Sep 2013 12:34	Patient - account deleted by Admin	30740531	
19 Sep 2013 12:34	Admin - Patient Deleted		
12 Sep 2013 17:20	Patient - signed in	30740531	
12 Sep 2013 11:59	Patient - signed in	30740531	

# Disabling Patient Login

Should you wish to remove the Patient Login feature from your practice website, you can do so at any time by visiting Patient Login/Disable Patient Login, selecting 'Yes' using the drop-down, then clicking 'Confirm':

## Disable Patient Login

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Do you wish to disable Patient Login?

[Back](#)

[Confirm](#)

Once disabled, the administration facilities will disappear, and patients will no longer be able to sign into the website using their Patient PIN and password. All data will remain on the GP Fusion web server such that if Patient Login is re-enabled in the future, it will still be available. All data can be completely and permanently deleted on request.