

# How to use Patient Access

## A Guide for our Patients





## Register with a letter

*Last Updated : 11-Apr-2019*

### Register with a letter

Ask your practice for a Patient Access registration letter.

**Note:** When you collect the letter from your practice, you'll need to take proof of identity (e.g. your driving licence or passport) with you.

When you have a registration letter, use the steps below to set up your Patient Access account. You can also view our video tutorial on how to register with a letter [here](https://support.patientaccess.com/videos/register-with-a-letter) (<https://support.patientaccess.com/videos/register-with-a-letter>).

1. Go to <https://app.patientaccess.com/registration> (<https://app.patientaccess.com/registration>).
  2. Enter the practice postcode or name of where you are currently registered.
  3. Select **Search**.
  4. Select your practice from the list provided.
  5. Select **Continue**.
  6. Below the question 'Have you received a registration letter from your practice?', select **Yes**.
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7. Enter the Linkage key (which is recorded on the registration letter).
8. Enter the Account ID (which is recorded on the registration letter).
9. Select **Confirm**.
10. Enter your personal details, then select **Continue**.  
**Note:** The personal details must match the details held by your practice.
11. Enter your email address (please note this must be unique to your account), mobile number (optional), and a password of your choice.  
**Note:** Your password must be at least 8 characters in length, contain at least one upper-case letter, one lower-case letter and one number.
12. Select the box to accept the terms and conditions.
13. Select **Register and create account**.  
Your account has been created.

**Note:** Should you need your linkage key or account ID for any reason in the future, they are stored as part of your profile in the Linked practices section of the My account screen.

## Still having a problem?

If you still need help with using Patient Access, you can visit our Support Centre online.







If you want to discuss medical issues, please contact your practice

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## Navigate Patient Access

*Last Updated : 20-Apr-2018*

### Dashboard

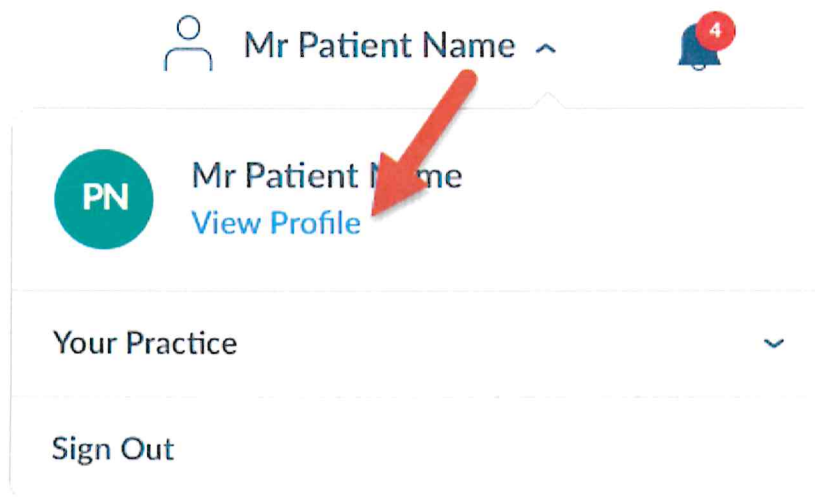
Option	Use to...
 Home	Return to the homepage.
 Appointments	Book, view, cancel or print appointments.
 Repeat Medication	Request repeat medication, or view previous requests. You can also delete a request if required. <b>Note:</b> Acute medication is for information only. Acute medication cannot be requested using Patient Access. Contact your practice.
 Personal Health Record	View data uploaded using third-party applications such as Apple Health.
 Medical Record	Access the various sections of your medical record. You can also filter, where applicable by date, share and export sections of your record.
 Messages	Send, view or delete secure messages between yourself and your practice. <b>Note:</b> This is for non-urgent enquiries only.

### Homepage

Section	View
Upcoming appointments	Your next appointment (or select <b>View all</b> to view every future appointment you have booked and any past appointments). You can also select <b>New booking</b> to book a further appointment.
Medication requests	Any requests that are 'In Progress' (or select <b>View all</b> to view all current and previous requests). You can also select <b>New request</b> to request further medication.

Messages	New/unread message from your practice in response to a query you have raised (or click <b>View all</b> to view all messages). You can also select <b>New message</b> to send a new message.
Nominated pharmacy	Add or edit your nominated pharmacy.
Trending topics	Trending topics and articles from <b>patient.info</b> ( <a href="https://patient.info/">https://patient.info/</a> )


## View Profile




*The View Profile option, which is visible once your name is selected*

Section	Use to...
View Profile	<p>Update your <b>account details</b>, i.e. email address, phone number and password.</p> <p>Update your <b>contact details</b>, i.e. address (if enabled).</p> <p>View, nominate or edit your <b>nominated pharmacy</b> to identify where you would like to collect your medication.</p> <p>View the available <b>services</b> that your practice provide, and view which services you have enabled.</p>
Sign Out	Sign out of your Patient Access account.

## Help & Support

Option	Use to...
 <b>Help &amp; Support</b>	Access the support centre which contains training guidance on using Patient Access and common queries.

## Notifications

Option	Use to...
	<p>View notifications which alert you of unread messages, new services, missing contact details, other important information.</p> <p><b>Note:</b> Once you have read the notifications, you can choose to <b>Clear All</b> in the top right-hand corner.</p>

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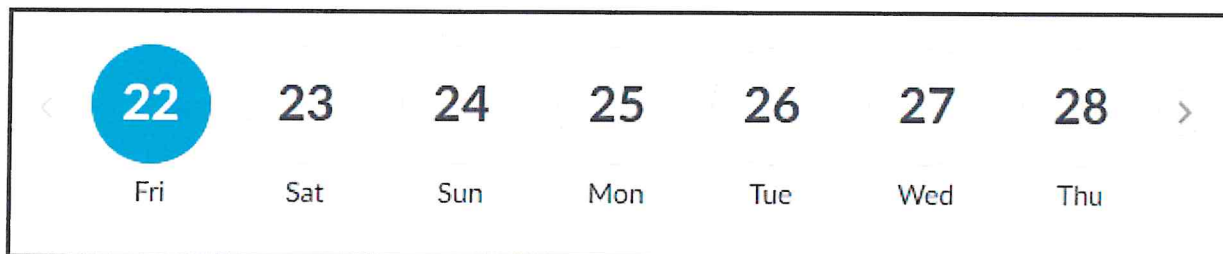


## Book appointment

*Last Updated : 19-Apr-2018*

If you would like to book an appointment, follow the steps below. You can also view our video tutorial on how to book an appointment [here \(https://support.patientaccess.com/videos/book-appointment\)](https://support.patientaccess.com/videos/book-appointment).

1. Do one of the following:
  - Select **New booking** from the Upcoming appointments section of the homepage.
  - Select **Appointments** from the dashboard, then select **Book new appointment**.
2. Select **Filters**, if required, to choose the practice member you would like to book the appointment with from the list provided. Alternatively, leave as 'No preference'.
3. Select the date for the appointment, or use the arrows left and right to see more available dates.



4. Select the appropriate time.
5. Add the reason for the appointment.
6. Select **Book appointment**.

The appointment has been booked.

**Note:** You can choose to print or export/add the appointment to your calendar at this point by scrolling down.

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## Cancel appointment

*Last Updated : 20-Apr-2018*

If you need to cancel an appointment, follow the steps below. You can also view our video tutorial on how to cancel appointments [here \(https://support.patientaccess.com/videos/cancel-appointment\)](https://support.patientaccess.com/videos/cancel-appointment).

Do one of the following:

Cancel directly from the Upcoming appointments section of the homepage.

1. Select the appointment from the Upcoming appointments section.
2. Select **Cancel appointment**.
3. Enter the reason for cancelling the appointment.
4. Select **Cancel appointment**.

Cancel from the Appointments section.

1. Select **Appointments** from the dashboard.
2. Locate and select the appointment you wish to cancel, or select  
... in the top right-hand corner of the upcoming appointment.
3. Select **Cancel appointment**.
4. Enter the reason for cancelling the appointment.
5. Select **Cancel appointment**.

The appointment has been cancelled.

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## Print appointment or add to calendar

*Last Updated : 19-Apr-2018*

### Print appointment

If you would like to print the details of an upcoming appointment, follow the steps below.

1. Select **Appointments** from the dashboard.
2. Locate and select the appointment you wish to print.
3. Select **Print**.

The appointment details are printed.

**Note:** You cannot print a past appointment.

### Add to calendar

If you use an online calendar, e.g. Google calendar, and would like to add an upcoming appointment to the calendar, follow the steps below.

1. Select **Appointments** from the dashboard.
2. Locate and select the appointment you wish to add to the calendar.
3. Select either **Export as calendar event** or **Add to Google calendar**.

The appointment has been added to the calendar.

**Note:** You cannot add a past appointment to a calendar.

### Alternatively...

You can also use the **...** option for upcoming appointments which you may wish to print, export/add or cancel.

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## Request repeat medication

*Last Updated : 20-Apr-2018*

Important points to note:

- You can only request repeat medication through Patient Access.
- Acute medication is for information only (if more is required, contact your practice).
- Repeat dispensing items (when a clinician has, for example, authorised 10 issues of medication over 10 months) should be collected direct from your nominated pharmacy at the appropriate intervals. Only when the number of authorised issues has expired (for example, all 10 issues have been collected), should you contact your practice direct for further guidance. These items should *not* be requested through Patient Access.

### Request repeat medication

If you would like to request repeat medication, follow the steps below. You can also view our video tutorial on how to request a repeat medication [here](https://support.patientaccess.com/videos/request-repeat-medication) (<https://support.patientaccess.com/videos/request-repeat-medication>).

Request new

1. Do one of the following:

- Select **New request** from the Medication requests section of the homepage.
- Select **Repeat Medication** from the dashboard.

2. Select  to add the medication(s) you would like to request.

All selected medications can be viewed on the right-hand side of the screen.

3. Select **Request**.

4. Enter a message for your GP if applicable.

**Note:** This field is optional, mandatory or disabled depending on your practice.

5. Select **Confirm request**.

6. Select one of the following:

- **Nominate pharmacy** (to locate and select a pharmacy, if you have not configured a nominated pharmacy (<https://support.patientaccess.com/repeat-prescriptions/nominate-pharmacy>), who will be sent the prescription electronically).  
**Note:** In this scenario, the prescription does NOT need to be collected from your practice. The medication can be collected directly from your pharmacy, once approved by your practice.
- **Not now** (to collect the prescription from your practice).

7. Your prescription request has been sent.

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## View medication requests

Last Updated : 20-Apr-2018

**Medication requests**

New request

Requested on 10 Apr 2018

Aspirin 75mg tablets

You have 1 pending requests [View all](#)

*The Medication requests section of the homepage*

The most recent (in progress) request will be displayed in the Medication requests section of the homepage. Select **View all** or select **Repeat Medication** from the dashboard to view all requests. The requests are split between:

- **Your medication** - current requests that are being dealt with by your practice, and other medications you can request.

**Your medication** Requests

- **Requests** - pending or historic requests that have either been accepted or rejected.

Your medication **Requests**

**Note:** You can cancel a request, if required, in the Requests section. Access Repeat Medication > Requests, select the pending request, then follow the instructions on-screen.

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## Cancel a medication request

*Last Updated : 20-Apr-2018*

You can cancel a medication request you have made through Patient Access, as long as the request is still in progress and hasn't already been accepted or rejected.

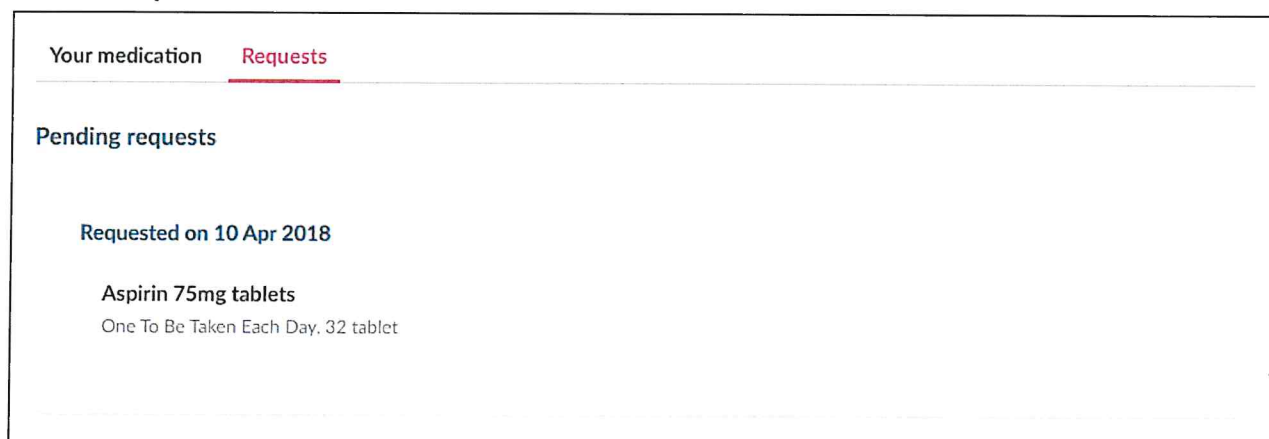
If you would like to cancel a medication request, follow the steps below. You can also view our video tutorial on how to cancel a medication request [here](https://support.patientaccess.com/videos/cancel-a-medication-request)

(<https://support.patientaccess.com/videos/cancel-a-medication-request>).



*The Your medications section of Repeat Medication*

1. Access **Repeat Medication** on the dashboard.
2. Select **Requests**.



3. Select the pending request in question.
4. Select **Cancel Request**.
5. Add a reason for the cancellation, then select **Confirm cancellation**.

The request is cancelled.

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## View your medical record

*Last Updated : 30-May-2018*

**Note:** Certain services, such as viewing your medical record, nominating a pharmacy, changing contact details and messaging, are only available to practices in England and certain parts of Northern Ireland at this time. Your practice decides which of the available services they make available to their patients.

If you have medical record enabled, there will be a medical record section on the Patient Access dashboard once you've signed in. To view your medical record, simply select **Medical Record** from the dashboard to expand the selection, then select the area you would like to view.

Depending on what your practice have enabled you may be able to see your:

- Problems
- Medications
- Test results
- Documents
- Consultations
- Immunisations
- Allergies

**Note:** What you see and do on Patient Access is controlled by your practice and they decide which areas of your medical record you can see. If you'd like to see more of your medical record, speak to your practice about this.

### Viewing options

#### Filter

Select Filter: **Show all** in any area of the medical record, other than Problems and Medications, to just display data between particular dates or a particular range.

Select from:

- To and From specific dates.
- This Month.
- Last Month.
- This Year.
- Last Year.

Select Filter: **Show all**, select the required dates or option, then **Apply filter**. To remove the filter and show all data, simply click x at the end of the date range displayed.

Share

## Select **Share**



in any area of the medical record, other than documents, to temporarily share your record with family and friends or healthcare professionals. Documents cannot be shared.

**Note:** You can also access the option to **share your record**

(<https://support.patientaccess.com/medical-record-viewer/share-your-medical-record>) by selecting **Medical Record** on the dashboard to expand the selection, then **Share Record**.

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## Grid or list view

In any area of the medical record, other than Test Results, you can select from either a grid view



(default setting) or a list view



. This simply changes the way the data in your medical record is displayed online and can be changed at any time.

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