**Online access reports**

“**Online access status**” will show which of your regular registered patients have an online account

Table

Description automatically generated

We have included only **EMIS Number** in the Patient Details table (which is sufficient to identify any patient that you wish to look at further), but you could add more columns (e.g. name) if you wish.

The Online Users table has four columns, with the following options

**Service User’s account status**:

Live = in use

Active = set up but not in use

Archived = not used for over 12 months

blank = no online access

**Service User Association**:

Self = patient has access to their own record

Proxy = someone else has access to the patient’s record

**Online services client**:

The service providers with whom the patient has an account (they may have several)

**Service User’s record access level**:

Off = no access to coded data

Core = meds & allergies only

Detailed = some/all of the available sections, will likely be different for each patient

*If you wish to add criteria to the report, see the next two pages*

You may wish to amend the “**Online access status”** report, to remove the patients who do not have an online account, for example.

Edit the report and select the Criteria link in the Online Users table:

Graphical user interface, text, application

Description automatically generated

These are the options available for each of the columns included in this report:

Graphical user interface, application

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**Service user’s account status:**

Live = in use

Active = available, but patient needs to link account to practice

Inactive = ID verification required

Archive = inactive for 12 months or more

Graphical user interface, application

Description automatically generated

**Service User Association:**

Self = patient has access to their own record

Proxy = someone other than the patient  
 has access to the patient’s record  
 *(instead of or as well as the patient having Self access)*

Graphical user interface, application, Word

Description automatically generated

**Online services client:**

A list of the available providers

The report will show all the providers with whom the patient has an account if none are selected.

Graphical user interface, application

Description automatically generated

Graphical user interface, text, application

Description automatically generated

**Service user’s record access level:**

Off = no access to coded data

Core summary care record = Meds and Allergies only

Detailed coded record = some/all coded data  
 (and none/some/all free text)

*Legacy = previous settings*  
 *(this option is unlikely to exist in most practice systems now)*

The “**Online access level**” report will show how much data each regular registered patient can see

Graphical user interface

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This is a small portion of the full report – you will need to Export to CSV to view and manipulate the full data.

Calendar

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*[we have amended the column header text to allow the screenshot to fit!]*

The following is an example, but the principle is true for the five columns in each section:

Lab Results columns B-F

Documents columns G-K

Immunisations columns L-P

Problems columns Q-U

Consultations columns V-Z

**Consultations:**

Filter column V (“Service user has access to Consultations”) by TRUE only

Column W (“Consultations from date enabled”)

FALSE = patient has access to coded data in all their consultations

TRUE = patient has access to coded data in consultations from  
 the date shown in column X (“Consultations from date”)

Column Y (“Consultations freetext filter enabled”)

FALSE = patient cannot see free text within any consultation

TRUE = patient can see free text within consultations from  
 the date shown in column Z (“Consultations freetext from date”)