

Guide for volunteers: helping someone set up their NHS App

As a volunteer helping someone set up their NHS App, your role is to provide guidance while respecting privacy and confidentiality. This guide will help you walk someone through how to set up the NHS App in a community hub, library or other support setting.

You can help a person register for the NHS App using their smartphone or tablet, or by going to the NHS website on a tablet, laptop or computer, where they can use the online version of the NHS App at <https://www.nhs.uk/nhs-services/nhs-login/>.

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Data protection considerations

As a volunteer, you must understand and adhere to key data protection principles:

- **Don't handle devices:** Guide verbally rather than physically handling their devices
- **Never view or handle personal data:** Make sure you don't see passwords or personal medical information
- **Be aware of your surroundings:** Ensure screens aren't visible to others

Safeguarding considerations

As a volunteer helping potentially vulnerable individuals:

- **Verify capacity:** Ensure the person understands what they're doing and can make informed decisions about their NHS account
- **Report concerns:** Always follow your organisation's safeguarding policy and procedures, and remember that safeguarding is everyone's responsibility
- **Avoid coercion:** Never pressure someone into creating an account
- **Maintain boundaries:** Your role is to guide, not to take control of the process

Explaining what the NHS App does

Help them understand what the benefits of using the NHS App are, including that they can:

- Request repeat prescriptions without contacting their GP surgery
- View their appointment notes, test results and medications securely
- View their appointments and referrals
- Submit a form if they want to request a document or test results
- Receive messages from their trusted healthcare providers
- Find trusted health information
- Use NHS 111 online services

Note, the services available can depend on whether the GP surgery has enabled them.

Let those concerned with data protection know that the NHS App is secure. It meets all standards required by data protection regulation, such as GDPR, by the National Data Guardian and by the Government Digital Services 'Digital by Default' Design Standards.

Eligibility requirements

Confirm users are:

- 13 years or older
- registered with a GP surgery in England or the Isle of Man

Note:

- those aged 13-15 need to contact their GP surgery for access to GP online services before they can use the NHS App.
- those registered at a surgery provided by Defence Medical Services (DMS) cannot currently use the NHS App.

Explain that they need to set up an NHS login account

You can then guide the person to set up their NHS account, also known as an NHS login. An NHS login account can be used to log in to a variety of health and care services.

Explain that once set up, they can log in to their NHS login account both in the NHS App and on the NHS website, where they can access the same services that are in the App.

Note: If someone has already set up an NHS login account to access another online NHS service, such as the Patient Access app, they can use the same email and phone number to access the NHS App - they don't need to set up a new NHS login account.

Explain that they need to verify their identity

For full access all services in the NHS App, explain that they need to verify who they are to connect their NHS account to their GP surgery. Without verification, they can only access some services such as NHS service finder and Health A to Z.

To set up an NHS account online with you, they will need:

- their own email address - if someone doesn't have, or shares, an email address, you can help them to set up a free account with an email provider
- a mobile phone number - the same number can be used for different accounts
- a mobile phone, tablet, laptop or desktop device with a camera
- an approved form of photo ID (see list below)

Acceptable Forms of ID:

Explain that they can use one of the following forms of photo ID to verify their identity:

- Passport
- UK driving licence (full or provisional)
- European driving license (full)
- European national identity card
- UK application registration card (ARC)
- CitizenCard

The ID should be valid (in-date) but can be accepted if it expired less than 12 months ago.

If they don't have these requirements, refer them to a GP surgery

If someone faces significant difficulties or blockers setting up their NHS account, such as if they:

- don't have the required ID
- don't have a postcode and need their NHS number to complete set-up
- experience technical issues that you can't solve
- need additional support due to accessibility needs
- are unsure about any aspect of the registration process

Let them know they can visit their GP surgery for direct assistance or call their practice to request the necessary registration details.

If they don't have the required ID, their GP surgery will then send them a 'Patient Online Details' document. This is a letter, email or text message containing the below 3 pieces of information:

- The ODS code of their GP surgery (also known as an Organisation Code or Practice ID)
- An Account ID
- A linkage key or passphrase - note, the key/passphrase expires after 2 weeks

Once they have this information, they can return and you can proceed with the guidance using the sections 'Setting up an NHS account' and 'Verify identity without ID'.

Setting up an NHS account

1. Download the NHS App

- Help them to open the App Store (iOS) or Google Play Store (Android)
- Search for "NHS App" and select to install it

Or direct them to the NHS account section on the NHS website: <https://www.nhs.uk/nhs-services/nhs-login/>

2. Create an NHS account

- Help them to enter their email address and continue
- Help them to create a secure password - refer to the instructions on screen to make sure the password is secure
- Ensure they accept the NHS login terms and conditions
- A security code will be sent to their email - help them locate and enter this code
- Help them to enter their mobile phone number
- A security code will be sent to their phone - help them to enter this code

3. Find your NHS record

1. If they **do** know their NHS number (this can be found on letters from the NHS or prescriptions), help them enter their NHS number
2. If they **don't** know their NHS number, help them enter their name and postcode
3. Help them enter their date of birth

4. Proceed to verify their identity

They may not see a prompt asking them to do this, if using the NHS App, please guide them to interact with some features such as 'prescriptions' and it should then come up on screen.

If the user is verifying their identity without photo ID, please skip to the next section.

Verifying identity with photo ID

This must be done on a device with a camera.

If the person you're helping has photosensitive epilepsy or anything that would make it hard for them to observe flashing coloured lights, please guide them to use the video verification method.

Option A - Using photo ID with face scan

1. Take a photo of their ID - the image needs to be of the physical ID, not a printout or screen. Make sure you've not covered any part of the page, you can clearly see all information and there's no shine from a light or window.
2. Complete an automated face scan to match with the photo ID when prompted:
 1. Make sure the user puts their face in the centre of the circle on screen

2. Tell them not to talk during the scan and to keep their eyes open
3. Ensure you (the volunteer) are not in view during the face scan

Option B - Using photo ID with video verification

1. Take a photo of their ID - the image needs to be of the physical ID, not a printout or screen. Make sure you've not covered any part of the page, you can clearly see all information and there's no shine from a light or window.
2. Record a short video of the person saying 4 random numbers (or signing 4 numbers in British Sign Language or writing 4 numbers down and showing them to the screen).
 - This can be done using the device's camera, or you can instruct the person to take a video on another device and send it as an attachment using their email - then log in to their email on the computer and add the attached video to set up the account.
 - Make sure you (the volunteer) are not in view or telling the user what to do during the video.

They will receive an email confirmation when they have been verified. If the verification check has failed, they'll receive a rejection email stating the reason why it has failed. This can take 24 hours or longer over weekends to receive. You may need to complete setting up their NHS login account another day, once they have received this email.

Verify identity without photo ID

If someone doesn't have suitable photo ID, they can still verify their identity. To do this, they will need to contact their GP surgery to request an online account.

When they have these details, arrange for them to come back in or for them to follow the below instructions:

1. Download the NHS App or go to the NHS website
<https://www.nhs.uk/nhs-services/nhs-login/>
2. Create an NHS account as described above (email, password, verification codes)
3. During the verification process, when asked if they have photo ID select "No, I do not have photo ID."
4. Then, select "Yes - I use online services"
5. Select "Yes - I have all 3 details"
6. Enter the ODS code, account ID and linkage key/passphrase
7. Enter their full name and date of birth

Final steps

Log out: Ensure they've logged out properly if using a shared computer.

Log in again: If they've received their email confirming their identity has been verified, ask them to confirm they're comfortable with the process of logging in.

Set up a passkey: When the user logs in again, they will be prompted to set up a passkey. Passkeys provide the strongest protection against phishing and hacking attempts. You can learn more about them on <https://help.login.nhs.uk/manage/passkeys>. However, if the person you're helping has low digital skills, they might want to skip this step. If they are using a shared or library device, they should **not** set a passkey up.

Turn biometrics on: Check if those using their own device can set up fingerprint, facial or iris recognition to log in to their NHS App, in their device settings, and under 'App settings' in the 'Profile' section of the App, instead of using a password and security code each time.

Turn notifications on: Guide them to turn on 'Notifications' in their device settings, and under 'App settings' in the 'Profile' section of the NHS App, to be alerted to new messages. Note, if more than one person signs in to the App on one device, notifications will only appear for one NHS account, but the notification will not state which account it is for.

Let them know they can manage health services for someone else: If someone cares for a person who is registered at the same GP surgery, they can contact the practice to request to also use the NHS App on behalf of the person they care for. This is also known as proxy access or a linked account.

Remind them of other NHS App features: They may only be able to see their GP records to a set date, ask them to contact their GP practice to request see their full digitised records.

Let them know how to get further support: Remind them they can access help through the App's help function at the top right of the screen or at nhs.uk/nhs-app.

Do not keep any personal information and documents: Make sure you have not kept any personal information and check that all personal documents have been collected

Volunteer support tips and accessibility considerations

- Don't take or keep notes containing personal information
- Respect privacy: Position yourself so you can guide without seeing sensitive information
- Allow plenty of time as the verification process can take several minutes to complete
- Ensure stable internet connection before starting
- Keep leaflets handy; the NHS App toolkit has helpful leaflets people can take home
- Explain to those with visual impairments that the NHS App and website are compatible with screen readers
- Remember that not all users have strong digital literacy or confidence
- If you get stuck in the login process, please use the login help centre <https://help.login.nhs.uk/>

Glossary

NHS App - Run and owned by the NHS, it is a free app that gives anyone aged 13 and over in England and the Isle of Man access to a range of online health services. It can be downloaded to a smartphone or tablet from the App Store or Google Play Store.

NHS account - A secure account patients use for NHS online services. Patients can log into their account on the NHS App on a smartphone or tablet, or through a web browser on a computer. Both routes give access to the same services.

NHS login - The service that allows people to access a range of health and care websites and apps with one set of login details (their NHS account details).

Biometrics - Some devices, and apps used on them, can be unlocked using a physical characteristic instead of a password, such as a fingerprint, face or iris identification.

GDPR (General Data Protection Regulation) - The legal framework that governs how personal data is collected, stored and used.

Linkage key/passphrase - A unique code provided by a GP surgery to securely link a patient's NHS login account to their medical record.

ODS code (Organisation Data Service code) - A unique code that identifies a GP surgery. Also referred to as an Organisation Code or Practice ID.

Patient Access app - A separate third-party app offering online GP NHS services.

Personal data - Any information that could identify a person, such as their name, date of birth, address, NHS number or medical record.

Proxy access/linked account – Allow people to use the NHS App to manage health services on behalf of someone they care for, if they are both registered at the same GP surgery, with the surgery's permission.

Two-factor authentication (security code) - A security step where a one-time code is sent to an email or phone number to confirm the person logging in is who they say they are.