

March 2022 Live Partner Collaboration Session Summary

Date of session: 2.3.22

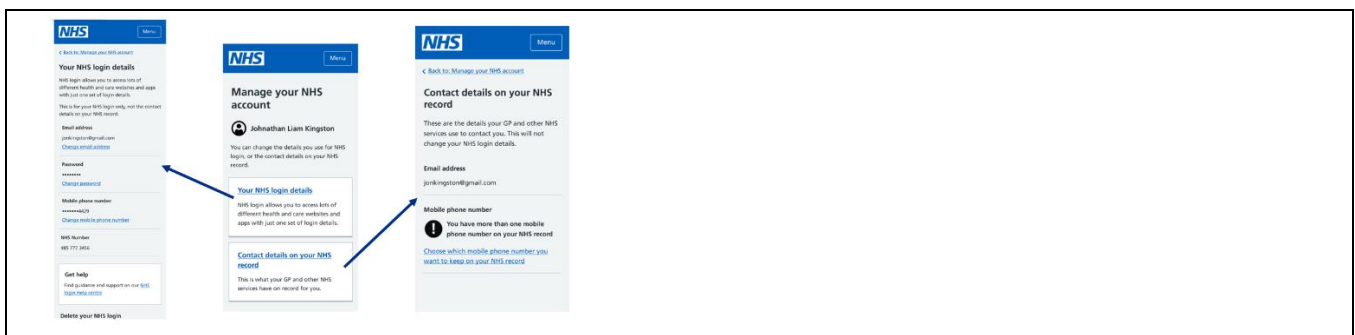
Attendees: NHS login team & Live Partners

Update

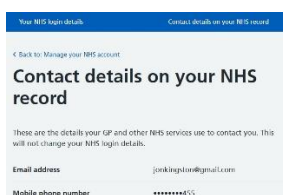
- Richard McStay, Lead Delivery Manager, gave an update on;
 - Roadmap – this is being worked on and will be shared next time, but we have funding for the next 3 yrs. and there is lots of work being done to make sure the system is robust and secure for the growing volumes of users and partner services
 - Partner Statistics – apologies for the delay on this, we are working on the online version and will give an update at the next meeting

Account Settings

- This work is to improve users NHS record i.e. what is on PDS and held at their GP
- Problem** - Users could only update their NHS record details if interrupted in the NHS login journey and then only every 6 mths.
- Solution** – So we've restructured account settings and introduced a section which allows users to update their NHS record contact details
- Value** - Users will be able to update their NHS record details at any time. They can now update or delete contact details
- Hayden Gilmore, product owner, demonstrated this with several videos and user journeys of users now having the option to update either their NHS login details and/or their NHS record – with a short explanation about what each is under each option call to action.



- If user has the same phone or email for both login and NHS record- their details will be displayed. Or else, the user is presented with one the three different scenarios for email and phone details:
 - User has no phone or email on their NHS record
 - User has a phone or email on their NHS record but it is different to their NHS login phone or email (login and PDS mismatch)
 - User has multiple active phone/email entries on their NHS record



- If the information is different on their GP record to their NHS login record or if there is now email or phone number on their NHS record, we are asking them if they want to up date them and use their NHS login

email or mobile phone (whichever is different on both records) for their NHS record, as NHS login is the most up to date information.

- In many cases in PDS users can have multiple emails or mobile numbers so this gives them the option to choose one
- Key difference now is they can do this at anytime.
- In short....
 - Users will have a settings page with separate sections for login and NHS record details, with useful descriptions of each
 - Users will be able to change their NHS record contact details at any time, instead of only getting a chance to do so via the interrupt journey
 - Users will be able to change both- login and NHS record details in one place without needing to contact their GP
 - Users are informed of possible delays of changes to GP records
 - Pages of the journey are dynamic and descriptive, based on the journey the user has taken. Makes it clear if they are adding or amending details, which details they have chosen to use
- **Benefit to Partner:**
 - **Users who change GP can update their contact details via this method.**
 - **Users information will be more up to date in PDS for better matching/searches**

What's Next

- Work will focus on;
 - Asking users at the end of the journey if they want to update GP details, allowing users to add more information onto their GP record that isn't there
 - A lot of internal work to make sure that the service runs quicker and reduction of the error codes
 - Moving demographics to beginning of the PYI journey for the user to check
 - Work looking at the user case for P0 to P5 uplift when entering into a different service to the one they got their P0 from – do they realise this?

New ID Types

- Leah Thompson, new product owner who has replaced Martin Fell, talked about now accepting more ID types as part of verification, which went live yesterday.
- **Problem:**
 - Although we accept BRP (British Residents Permit) as a valid ID type, we do not give the users an option to select this in the front end.
 - We also don't tell users that we accept this photo ID type unless they are rejected due to photo ID issues, or they find the article on the help centre.
- **Solution:**
 - Tell users up front what types of ID we accept and allow them to select this ID type.
 - We also can use this opportunity to rework and refine the photo ID upload pages to future proof them as/when any other ID types are released or if we decide to accept other ID types.
 - Plus have taken off the list of ID's as user research showed that this was overwhelming.
 - The link to POL has also been moved to after the call to action button at the bottom as users where clicking on it in the previous version to carry on the journey as normal

New ID Types

Previously:

- Users confused
- Users read the button and then go up to select ID type from the list
- Users selecting POL route as it is the first link they see

Now:

- More informative
- No confusion over main CTA
- Removed the overwhelming list of ID types

New ID Types

Previously:

- Users unsure if they will be asked to take 2 photos
- Users not keen on bothering to take a photo if there is another seemingly easier option to complete this step (POL)
- Users frustrated when POL isn't as easy as it seemed

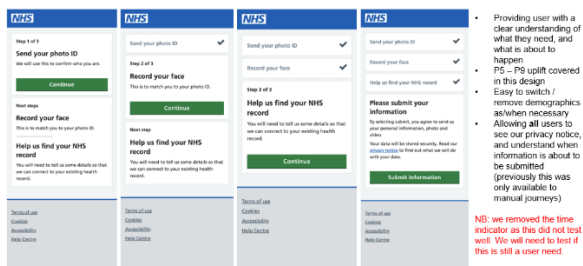
Now:

- Removed step 1 of 3 subtle as new steps pages explain this
- Clearer refined options – reducing unnecessary information for those who don't need it
- Less cognitive load for the users
- Clear explanation as to what to do if no ID
- Explaining up front what is necessary in order to do POL route

User Steps

- Problem:**
 - User feedback showed there was some frustration with users not knowing where they were up to in the PYI journey.
 - Further evidence was suggesting some users were forgetting the information we tell them at the start of PYI about what they need to complete the journey.
- Solution:**
 - Re-design the user journey to incorporate a page which informs users of their progress.
- Progress:**
 - Will be in production end of March/ start of April

User steps



POL users to PYI

- **Problem:**
 - Previously, any user who had been through POL and had their POL credentials invalidated would not be able to use the PYI journey.
- **Solution:**
 - Updates throughout the POL journey to allow for a user to switch back to PYI
- **Progress:** LIVE

Triaging Changes

- **The Problem:**
 - Users encounter issues when they are trying to complete PYI.
 - This can be for a number of reasons but usually it is because the device the user is on, cannot support PYI or automation.
- **Solution:**
 - NHS login has a number of checks in place which can identify whether a device is compatible with PYI
 - We think that by completing all of these checks up front we will be able to either fail the user earlier in the journey or push them onto the optimal journey for their device type.

HMPO (Her Majesties Passport Office)

- **The Problem:**
 - Users struggle to take a photo of their passport that doesn't have problems like glare / blur / information being cut off etc.
 - Users with accessibility needs, such as those with mobility impairments struggle to take a picture of their ID.
- **Objective:**
 - Explore the benefits of implementing a HMPO passport check in to PYI as an additional option to uploading a photo of ID.
- **Progress:**
 - Kicked off the relationship with HMPO again
 - Initial meeting to understand their current position and ability to support us

Partner User Research

- Janet Morgan, Lead Partner Researcher, asked partners if they would like to share or conduct some user researcher with NHS login exploring the user journey from and back to a partner service
- **Objectives:**
 - In order to explore users understanding of NHS login, what they were using, the benefits of using it, how they can use it in the future
- **Outcomes;**
 - To help improve the users understanding of NHS login on a partner service

- To encourage them to use it
- To help please get in touch at Janet.morgan10@nhs.net or support.nhslogin@nhs.net

Q&A

- Presented POL TO PYI changes so users who fail PYI can now go into POL. Simon asked does this solve our issue of people moving overseas and not having a GP anymore.
 - Richard McStay said yes.
- Diane Pulikoden from PHR asked - Getting requests from users of PHR for proxy. They have a work around at the moment but is it on the roadmap?
 - Richard McStay - We're constantly considering it but its a huge risk. Have done 2 discovery pieces on it but there is no policy in place or a strong enough user case/UR feedback to justify it. NHSX have it on the roadmap to address