Help Centre articles

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Contents

1 What is the document purpose?

This document contains all of the existing Help Centre articles present on the Zesty Patient Portal.

2 Appointments articles

2.1 How do I add an appointment to my calendar?

You can add an appointment to your calendar once you have logged in. You can do this by selecting the relevant appointment in the **My Appointments** list and using the **Add to my calendar** feature. To see how it's done you can follow the steps below:

If you are not already on the **My Appointments** page you can access this by:

- Selecting the **Menu** icon in the top right corner of the screen
- Selecting **My Appointments** from the menu

Now we are on the **My Appointments** list you can add an appointment to your calendar as follows:

- Find the appointment that you would like to add to your calendar and select **Manage** or **View**
- In the appointments details screen select **Add to my calendar**
- From the menu list that appears select the appropriate calendar option
- This will then download a file or open the appropriate page to add the appointment to your calendar

2.2 How do I cancel an appointment? – Integrated trusts only

Once you have logged in you can do this be selecting the appropriate appointment in the **My Appointments** list and using the **Change date or time** feature. To see how it's done, you can follow the steps below:

If you do not have the **My Appointments** list displayed:

- Select the **Menu** icon in the top right corner
- Select **My Appointments** from the menu

Once on the **My Appointments** page:

- In the **My Appointments** list, find the appointment you want to cancel
- Then select **Manage**
- In the appointments detail screen select **Cancel Appointment**

- You will then be presented with an information page confirming that you would like to cancel your appointment. If agreeable click **Yes, cancel my appointment**
- You are then presented with options asking you to explain why you want to cancel the appointment. Select the appropriate option
- You are then presented with a further confirmation screen. If agreeable select **Yes, I want to cancel my appointment**
- You will then be presented with a page confirming your cancellation

Note

To accompany the appointment cancellation, you are also sent an SMS text message advising you that you have a new letter from us. By selecting the link in the SMS text message, you can view the letter confirming the cancellation of the appointment.

You can only cancel certain types of appointments online. We will be extending the range of appointments that can be cancelled over time.

2.3 How do I change the date or time of an appointment? – Integrated trusts only

Once you have logged in you can do this by selecting the relevant appointment in the **My Appointments** list and using the **Change date or time** feature. To see how this is done you can follow the steps below:

If you do not have the **My Appointments** page displayed, you can:

- Select the **Menu** icon in the top right corner
- Select **My Appointments** from the menu

Now on the **My Appointments** page:

- Find the appointment you want to change and select **Manage**
- In the appointment detail screen select **Change date or time**
- You will be presented with a screen providing information about changing your appointment. If agreeable select **Yes, change appointment**
- You will then be presented with different months that have availability for you with the number of available appointments displayed below
- Select the appropriate **Month**
- Select the appropriate **Day**
- Select the appropriate **Time**
- You are then presented with a confirmation screen from which you can either **Confirm new appointment** or **Cancel, keep original appointment**
- If you confirm that you would like to change your appointment you will be presented with a confirmation page which will display your new appointment date and time

Notes

You will also be sent an SMS text message as a confirmation of the change.

There are some appointments (such as electronic referrals) that cannot be changed automatically and require input from our team. If you are changing an appointment that does require input from us, you will be told about this during the change to your appointment. You will then receive further communication once we have completed the requested action.

You can only change certain appointment types online currently. We will be extending the range of appointment types that can be changed online over time.

2.4   How do I view my appointments?

If you want to view your appointments, you can easily do so after logging in. They will either be shown as the first page you see after log in, if not, you can access them via the **My Appointments** page.

To log in and view appointments, you can do as follows:

- Go to the **Patient Portal Login** page
- Input your **email address** and **password**
- Select **Log In**
- Select the mobile phone to which you want a code to be sent
- You will then be presented with the **Please enter your code** page. Enter the 5 digit number that has been sent to you via SMS text message (this can sometimes take a short while to come through)
- Once you have entered the 5 digit number select **Next**

You should then be presented with the summary of your appointment for today and those that are upcoming.

From here you can **Manage** or **View** your appointments and review letters that are available. You can also view previous appointments using the **Yesterday or older** section.

What if I don't see appointments directly after logging in?

If you don't see your appointments once you've logged in, you can easily find them. To do this:

- Select the **Menu** icon in the top right corner
- Select **My Appointments** from the menu

You should now be able to see your appointments for today and the future.

Note

Not all historic appointments will be presented in the **Yesterday or older** section. This list is limited by when we started to display appointments online, and also by those appointment types that are currently set to display online.

2.5   Why can't I see all my appointments?

When you log in and go to view **My Appointments** you can see your appointments that are **Today and upcoming** or **Yesterday or older**. However, you may not see all of your appointments. This is because not all historic appointments are available online. Only those appointments made since we started to display appointments online will be shown.

There are also a number of appointment types that will not be displayed online, for a host of different operational and clinical reasons.

Over time we are looking to make as many types of appointment available as possible.

2.6   How do I get notified about my appointments?

Every time you receive a digital appointment letter, we will also send you an SMS text message to let you know that you have a new letter. The SMS text message will include a link to the letter.

You can then simply log in and view your letter by following the link in the SMS text message.

Note

You will not receive a notification via SMS text message if you have opted out of receiving SMS text messages.

3   Letters & Documents

3.1   I got an error page when trying to look at a letter, what do I do?

The reason for receiving this error page is that the wrong account has been logged into when trying to view a letter.

When an SMS is sent to a patient concerning a letter, the link can only be opened in their account. In cases where one mobile phone number is shared by more than one patient, sometimes the incorrect patient logs on and will not be able to view the letter. This causes the error page to be displayed as the logged in patient does not have permission to access that letter.

An easy way to ascertain if this is the case, is to check the first name on the SMS that was received and ensure that this matches with the account you are logging on with.

3.2   What letters and documents are available?

When you register, you will be able to view and download selected outpatient appointment letters containing appointment date and time and other useful appointment information. However, you may not see all of your outpatient appointment letters. This is because not all historic letters are available online. Only those letters that were generated since we started to display appointments online will be available.

There are also a number of outpatient appointment letters that will not be displayed online for a host of clinical and operational reasons.

Over time, we are looking to make as many outpatient appointment letters available as possible.

3.3   How do I download letters?

When you have logged in and you are viewing a letter, you can download it as a PDF and store the letter or print it.

There are different ways to access, view and then download your letters. In this example, we'll walkthrough how you can do this by going through **My Letters**:

If you are not viewing **My Letters** you can:

- Select the **Menu** from the top right
- From the menu select **My Letters**

You are then presented with a list of letters. From here you can:

- Scroll through the list
- Select the required letter

Once you have selected the letter that you would like to download:

- Select **Create PDF**
- Then select **Download PDF**

The PDF is typically downloaded to your default download location on your device. It is worth noting that you can navigate back to where you were, to do this:

- Select the **letters** arrow in the top left corner

3.4   How do I print letters?

When you have logged in and you are viewing a letter, you can print it.

There are different ways to access, view and then print your letters. In this example, we'll walkthrough how you can do this by going through **My Letters**:

If you are not viewing **My Letters** you can:

- Select the **Menu** from the top right
- From the menu select **My Letters**

You are then presented with a list of letters. From here you can:

- Scroll through the list
- Select the required letter

Once you have selected the letter that you would like to print:

- Select **Create PDF**
- Then select **Download PDF**

The PDF is typically downloaded to your default download location on your device. Locate this file and follow your device settings to print the document.

It is worth noting that you can navigate back to where you were, to do this:

- Select the **Letters** arrow in the top left corner

3.5 How do I remove the 'starred' setting from a letter?

When a letter has been **starred**, similar to a **favourite**, you can easily remove the option by viewing the **starred** letter and selecting the yellow star icon.

To see how it's done, you can follow the steps below:

From the **All Letters** list:

- Select the relevant starred document
- Select the yellow star icon in the top right of the document

The star icon changes to an outline and is no longer yellow.

The letter is no longer **starred** and will not appear in the starred letters list.

3.6 How do I set and view a starred letter?

When you are viewing a letter, you can set it as **starred**. This is very similar to the idea of setting a **favourite.** Having marked a letter as **starred**, you can view only **starred** letters in one list.

There are different ways to access, view and then mark a letter as **starred**. In this example, we'll walkthrough how you can do this**:**

If you are not viewing **My Letters** you can:

- Select the **Menu** icon in the top right corner
- From the **Menu**, select **My Letters**

You are presented with a list of letters. From here you can:

- Scroll through the list
- Select the required letter

The letter is displayed. From here:

- Select the **Star** icon

The letter will now become **starred.**

How do I view starred letters only?

When you've marked a letter as **starred**, it is simple to view a list of these **starred** letters:

From the **My Letters** view:

- Select the menu drop down - e.g. "All Letters"
- Select **starred** from the drop down

The list of **starred** letters should now be displayed.

3.7   How do I view appointment letters?

When you have logged in you can view appointment letters in a few ways. Either from **My Letters, My Appointments** or from **Appointment detail.** Each method can be seen below:

My Letters

If you are not viewing **My Letters** you can:

- Select the **Menu** icon in the top right
- From the menu, select **My Letters**

Now, you are presented with a list of all letters. From here you can:

- Scroll through the list
- Select the required letter

It is worth noting that you can navigate back to where you were by selecting the **Letters** arrow on the top left corner of the letter page.

From my appointments list

In the **My Appointments** list, if any letters related to an appointment have not yet been read, you'll see a **new letter available** link at the bottom of the appointment detail. You can then select the link and view the letter(s).

The steps below show you how it's done:

- Select the **menu** icon in the top right corner
- From the **menu**, select **My Appointments**
- Select **unread letter available**
- In the **new letters** list, select the new letter to be viewed

From appointment details

When you select an appointment in the **My Appointments** list, you will see a list of **letters** associated with that appointment. By selecting a letter from the list, you can view the letter content.

The steps below show you how it's done:

From the **My Appointments** list

- Select **View** for the required appointment
- Scroll through the details to the **letters** section
- Select the letter to be viewed

3.8   Can I still receive letters in the post?

If you wish to continue to receive paper letters you can do this via one of the below methods, dependant on where you are in the registration process:

Setting 'Traditional Post' during registration

When you register, you are asked to provide your **letter delivery** preference. You can set this to **stay with traditional post**.

By changing 'Letter Delivery' method in my details

If you have previously set your letter delivery option to be **Paper Free**, you can revert to receiving letters via **traditional post** via the **My Details** menu option:

- Select the **Menu** in the top right corner
- Select **My Details** from the menu
- Scroll down to your **Letter Delivery** option
- Select the **Update** link
- In the letter delivery option that appears select **No, stay with traditional post**
- Select **Confirm**

4   My Details

4.1   How do I change my email address?

Once you've logged in, you can change your email address in the **My Details** section.

To do this:

- Select the **Menu** in the top right corner

- From the **Menu**, select **My Details**

The **My Details** view is displayed. From here:

- Select **Email**

In the **Please enter a new email address** screen that appears, you'll need to enter your password as a verification step and then enter the new email.

- Enter your existing **password**
- Enter the new **email address**
- Select **Change email**

The email address associated with your account is now updated and you are automatically returned to the **My Details** view.

Note

This change will only update your email address for your online account. To update us with your new email address, please contact us directly.

4.2 How do I change my mobile phone number?

At the moment, you cannot change the mobile phone number you have associated with your online account. If you need the mobile phone number to be changed, you'll need to contact us at the hospital.

If you want to check the number in use, once you've logged in, you can go to the **My Details page** to check the mobile phone number in use.

To do this:

- Select the **Menu** in the top right corner
- From the menu, select **My Details**

The **My Details** view is displayed, including the mobile phone number.

4.3 How do I change my password?

Once you've logged in, you can change your password in the **My Details** section.

To do this:

- Select the **Menu** in the top right corner
- From the **Menu**, select **My Details**

With **My Details** displayed:

- Select **Change** under the **Password** heading

In the **Change password** screen that appears, you'll need to enter your existing password as a verification step, then enter the new password once and re-enter the new password to help verify the change.

- Enter your existing **password**
- Enter the new **password**
- Then again retype **new password**
- Select **Change Password**

The password associated with your online account is now updated and you are automatically returned to the **My Details** view.

4.4   How do I opt to go 'paper free'?

If you go 'paper free' you can stop receiving paper letters in the post and receive letters digitally online. By doing this, you can help the NHS reduce costs and save money.

You can either go 'paper free' when you register, or when you have logged in via the **paper letters** option in **My Details**. To see how you can go 'paper free' when you have already logged in, you can follow the steps below:

- Select the **Menu** in the top right corner
- From the menu, select **My Details**
- Scroll through the **My Details** list
- Select the option **Paper letters**

In the **letter delivery** screen:

- Select the option **Yes, go paper free**
- Select **Next**

In the notification screen advising that you may still receive some paper letters:

- Select **Continue**

You have now set the option to go 'paper free'.

4.5   How do I go back to traditional post from paper free letters?

The NHS sends hundreds of millions of paper letters each year. For every paper letter that the hospital sends, it costs the NHS over £1.

The digital letters provided online can be downloaded and printed so should you need paper copies; you can easily do so. If, for any reason, you do want to opt back in to receiving traditional paper letters, then doing so is quick and easy. To do so follow the steps below:

- Select the **Menu** in the top right corner
- Select **My Details** from the **Menu**
- Scroll down to your **Letter delivery** option
- Select the **update** link
- In the letter delivery option that appears select **No, stay with traditional post**
- Select **Confirm**

You have now opted back in to receiving paper letters.

4.6 How do I let you know my personal details need updating?

Once you've logged in, you can view a range of your personal details in the **My Details** section.

If you find that details such as your **email, password** or **paper letters preferences** need changing, you can change them in the **My Details** section.

If personal details, such as your **name** or **mobile number** need to be updated, you will need to contact us by phone. You can find our contact details by following the below steps:

- Select the **Menu** in the top right corner
- Select **Contact Us** from the menu

You are then presented with the different options available for contacting us.

4.7 How do I view my details?

Once you've logged in, you can view a range of your personal details. To view these details, follow the steps below:

- Select the **Menu** in the top right corner
- From the menu, select **My Details**

There is a range of information in the **My Details** section which includes:

- Email
- Password
- Name
- Mobile number
- Date of birth
- NHS number
- Letter preferences

As well details that can be viewed, some of these can also be updated here too.

5   Registration & Login

5.1 How do I log out?

It is always advisable to log out of your account when you are finished.

To do this:

- Select the **Menu** in the top right corner of the screen
- Select **Logout**

This will log you out of your account and return you to the portal homepage.

5.2 How do I opt out of SMS messages? – Trust specific

If you do not want to receive SMS text messages in respect of the online portal, you can opt out of receiving them.

To do this open the SMS that you have already received and you should find instructions to opt out of communication at the end of that message.

If you do not have an SMS or the message does not contain the opt out information this can be found below:

- Send an SMS to 60777 with the content **** STOP

Notes

- Unfortunately, SMS messages are an essential part of the service and you cannot opt out whilst registered. If you wish to de-activate your account, please contact us here

5.3 How do I opt back in to SMS messages? – Trust specific

If you would like to opt back in to receiving SMS text messages from the online portal you can do so by following the steps below:

- Send an SMS to 60777 with the text **** START

5.4 Who is eligible to register?

To register, you must be registered with us and have had an outpatient appointment created or changed since we made appointments visible online.

To register you will also need to:

- Have provided the hospital with a valid UK mobile phone number for your hospital records
- Be over the age of 18
- Have access to your NHS number - this is the 10 digit number that you will find on your hospital letters

Note

- Your mobile number is key. This is the number that we send an SMS text message to with an invitation to register. It is also one of the ways that we authenticate your identity.

5.5 How do I log in?

To log in you can follow the below steps:

- Go to the **Welcome Screen** in your browser
- Select **Log In**
- Select the **email address** field and input your email address
- Select the **password** field and input your password
- Select **Log In**

We now need to send a 5 digit code to your mobile in order to authenticate your identity.

- Select the appropriate **Mobile Number**
- You will receive a 5 digit code shortly after selecting your mobile number - please be patient as this can sometimes take a few moments to come through
- Once the code is received enter this into the box
- Select **Next**

You should now be presented with your **My Appointments** page.

5.6   How do I register?

Typically, registration is preceded by an SMS text message with an invitation to register. This may occur when you have a new appointment or there has been a change to an existing appointment.

In order to start the registration process do as follows:

- Select the link in the SMS text message
- On the **Welcome Screen** that opens, select **Continue**

You will need to provide your date of birth as a means of confirming who you are. To do this:

- Select the **date of birth** field
- Input your date of birth

If your date of birth is *1st October 1985* you would input your date of birth as *01 10 1985.*

- Select **Next**

You will need to provide your first and last name. To do this:

- Select the **First name** field and input your first name
- Select the **Last name** field and input your last name
- Then select **Next**

You will now need to input and confirm your email address. To do this:

- Select the **email address** field and input your email address
- Select the **confirm email address** field and re-enter your email address
- Then select **Next**

You will now need to input and confirm a password that is at least 8 characters long. It must contain at least 1 letter and 1 number. To do this:

- Select the **password** field and input a password
- Select the **retype password** field and re-enter the same password
- Then select **Next**

We will now need to send you a 5 digit code to your mobile phone, in order to validate you identity. To do this:

- Select the appropriate mobile number displayed on the screen

We will now send you a 5 digit code to your mobile phone. Please be patient as this can sometimes take a few moments. When this number is received you can:

- Select the **code** field
- Input the 5 digit code
- Then select **Next**

In order to access your appointments and documents, you'll need to agree to us contacting you via SMS text message and email. If you agree:

- Select the option **Yes, I agree to the Hospital contacting me via text message and email**
- Then select **Next**

You will now be asked if you would like to go paper free and stop receiving paper letters where possible.

- Select the appropriate action
- Then select **Next**

You will be presented with an alert informing you that you may still receive some letters, even if you have selected to go paper free.

- Select **Continue**

You have now completed registration and should be on the **My Appointments** page.

5.7   What do I need to register?
In order to register there are a few things you'll need. These are outlined below:

Mobile phone and signal

You'll need a mobile phone containing the original invitation SMS text message.

You'll also need your mobile to hand and have a phone signal during registration in order to receive and use the 5 digit code required to complete registration.

Device with a browser and an internet connection

You'll need a device (which could be a smartphone, tablet or desktop computer). This will need an up to date browser and internet connection.

Email address that has not already been used for registration

Finally, you'll need to use an email address that has not previously been used for registration. This is because the email address is used as part of the registration and login process and needs to be uniquely associated with one patient record.

5.8 What do I need to log in?
To be able to log in, there are a few things you'll need. These are summarised below:

To have previously registered

To be able to log in, you will need to have previously registered online.

To have your mobile phone to hand

When you log in, you'll need your mobile phone to hand as we send this number an SMS message containing a 5-digit code each time you login. This helps to verify your identify and keep your account secure.

To provide key information

When you login, you'll need:

The link that is in the SMS messages you receive with notifications

- Your Email address used for login
- Your Password
- The 5-digit code sent to your mobile phone to authenticate your identity

A connected smartphone, tablet or computer

You'll also need a smartphone, computer or tablet to access the website. This in turn will need:

- To be connected to the internet
- Have a reasonably up to date browser

5.9   What if I've forgotten which email I used to register?

If you've forgotten the email address you previously used to register, we can provide you with a hint to the email address you used. To get the hint:

- Go to the login page in your browser
- Select the **Forgot email?** link

You will be presented with the **Recover your email address** screen. From here:

- Input your **NHS number**
- Input your **date of birth**

Please note - If your date of birth is *1st October 1985*, you would input *01 10 1985*

- Select **Recovery email**

You will then be presented with a message noting that the NHS number entered is associated with an email address. It then shows some of the characters of the email as a reminder.

From here you can then select **Return to login** to open the login screen.

5.10 What if I've forgotten my password and cannot log in?

If you've forgotten the password that you used to log in previously, you can go to the login screen and select the **Forgot password** link. This will send an email to you with instructions to reset your password. To do this:

- Go to the login screen in your browser
- Select **Forgot password?**
- Input your **email address**
- Select **Reset Password**

You will then be presented with a page noting that you have been sent an email with password reset instructions.

If you now open the reset email in your inbox.

- Select the link **Change my password** in the email

You will be taken to a new webpage where you can enter your new password:

- Enter a **new password**
- Retype the **new password**
- Select **Reset password**

You will now be presented with a confirmation page as you have successfully changed your password. You can now select **Return to login** and use your new password to access your account.

Note

Your password must be at least eight characters and contain at least one number.

5.11 Why can't I register?

If you are having problems registering, there are a few things you can check.

Are you attempting to register without an invitation SMS text message?

If you are trying to register without the invitation SMS text message, you may be unable to register as we don't have any future appointments available online for you.

Have you received an invitation SMS text message?

If you have received the invitation SMS text message you can tap the link to being registration.

Are you inputting your date of birth correctly?

For example, if your date of birth is 14th April 1985, you would input the date in the format 14 04 1985. The website then formats this automatically as 14/04/1985.

Are you inputting a valid email address?

When you are adding your email address, it needs to follow an appropriate format to be recognised as a valid email address. You'll be able to see if your email address is accepted if a green tick appears next to the email address field.

Are you using an email address that has already been used for registration?

If you are using an email address that has already been used to register, you'll need to use a different email address. This is because the email address is used as part of the login process and needs to be uniquely associated with one patient record.

Are you inputting a password that meets the minimum requirements?

Your password needs to be at least 8 characters and contain at least 1 number.

Are you getting the confirmation code via SMS during registration?

As part of the registration process, we will send you a 5 digit code to your mobile phone.

Did you not agree to the hospital contacting you via SMS and email?

If you didn't agree to us contacting you via email and SMS, unfortunately you will not be able to complete the registration.

6   Support

6.1   I have a problem, what should I do?

Non-technical problem

If you experience a non-technical problem such as:

Your details are incorrect

You have a query around an appointment

Please contact - **TRUST SPECIFIC VALUE**

Technical problem

If you experience a technical problem such as:

The website not functioning correctly

Features not working

Please click here to report the problem on-line.

Note

Please do not send any personal identifiable information when reporting a technical problem.