

PRODUCT GUIDE

Access Rio Patient Engagement Portal

Empowering patients. Simplifying care.

A guide to the features, capabilities, and planned enhancements of the Access Rio Patient Engagement Portal (PEP) — designed to give patients digital access to their care, and to support NHS Trusts in delivering a modern, connected patient experience.



OVERVIEW

What is the Access Rio Patient Engagement Portal?

For many NHS Trusts, the patient experience outside of a clinical appointment is still largely paper-based and phone-dependent. Patients receive letters they may misplace, make phone calls to reschedule or cancel, and have no single place to view or manage their care. The Access Rio Patient Engagement Portal (PEP) was built to change that.

⚡ The Challenge

- × Patients relying on phone calls and paper letters for information that could be delivered digitally
- × Clinical admin teams managing avoidable appointment queries and manual cancellations
- × Assessment forms disconnected from the appointment journey, relying on paper or separate systems
- × Important letters and communications sent by post, easily missed or misplaced
- × No single place for patients to view and manage their care digitally

✓ The Solution

- ✓ A secure, mobile-friendly patient portal that gives patients 24/7 access to their appointments and care information
- ✓ Self-service appointment management — patients can cancel and reschedule within Trust-defined rules, reducing admin workload
- ✓ Pre- and post-appointment assessments delivered digitally, linked directly to the patient's appointment in Rio
- ✓ Letters and clinical documents accessible securely in the portal, reducing reliance on post
- ✓ Seamlessly integrated with Rio EPR — all data flows from the clinical system patients already have records in

PEP is not a standalone product — it works as a **window into Rio**. Patient data is never stored independently in the portal; it is read in real time from the Trust's existing Rio EPR system. This means there is no duplication of records, no data migration, and no change to existing clinical workflows.

THE PATIENT JOURNEY

From setup to self-service — how PEP works in practice

PEP is designed to be simple for patients and straightforward for Trusts to configure. The journey below shows how a patient moves from initial setup through to active, self-managed care — all driven by data already held in Rio.

1

Trust configures PEP via Rio

Teams, clinics, appointment types, and patient action rules are configured once inside Rio EPR. No separate setup is required in the portal itself — PEP reads directly from Rio's configuration.

2

Patient is invited automatically

When a patient is set up on PEP via a Rio sync, they receive an automated onboarding email introducing the portal and containing a secure, time-limited registration link. No manual outreach is required from the Trust.

3

Patient registers and logs in

The patient sets their password and accesses the portal via a secure native login — or using their existing NHS Login credentials, giving them a familiar and trusted authentication experience.

4

Patient views their personalised dashboard

The PEP dashboard brings together everything the patient needs in one place — upcoming and past appointments, pending assessment forms, letters and documents, and notification preferences.

5

Patient takes action

Within the rules configured by the Trust, patients can reschedule or cancel appointments, complete pre- and post-appointment assessments, view clinical letters, and set their communication preferences — all without needing to contact the clinic.

6

Everything stays in sync with Rio

Patient actions taken in PEP — such as appointment changes and completed assessments — are reflected directly in Rio. There is no duplication of records and no separate system for clinical staff to check.

PEP is accessible on any device — desktop, tablet, or mobile — and is built to meet **WCAG 2.1 Level AA** accessibility standards, ensuring it is usable by the widest possible patient population.

NHS INTEGRATIONS

Built for the NHS digital ecosystem

PEP is designed to integrate with the national NHS digital infrastructure, giving patients a consistent and familiar experience whether they access the portal directly or through existing NHS channels.



NHS Login

LIVE

NHS Login is fully integrated into PEP as an authentication option, allowing patients to sign in using the same NHS Login credentials they use across NHS digital services. This reduces friction at registration and gives patients a trusted, familiar way to access their care.

OAuth 2.0 / OpenID Connect

NHS Assured

Available alongside native login



NHS App Integration

LIVE

PEP is fully integrated with the NHS App, enabling patients to access their appointment information directly from within the NHS App — without needing to navigate to a separate portal. Patients arriving via the NHS App are authenticated automatically via single sign-on, creating a seamless, uninterrupted experience.

This integration has been delivered through the NHS Solutions Assurance process and is live with our first NHS Trust partner. To take advantage of this integration, your Trust will need to onboard with the NHS App — speak to your Access representative to find out more about what this involves and how to get started.

WHAT THIS MEANS FOR PATIENTS

- ✓ Access PEP directly from the NHS App — no separate login required
- ✓ Automatic SSO — authenticated via NHS App session without re-entering credentials
- ✓ Appointment deep-links — tap a notification and land directly on the relevant appointment
- ✓ Consistent NHS-branded experience, meeting NHS Design System and accessibility standards

ASSURANCE AND FIRST OF TYPE

NHS Solutions Assurance: Complete**First of Type:** Hampshire & Isle of Wight NHS Trust

Speak to your Access representative to begin your Trust's onboarding.

CURRENT FUNCTIONALITY

What PEP delivers today

The following features are live and available to NHS Trusts deploying PEP today. Each area is configurable by the Trust via Rio EPR — full configuration guidance is available in the supporting documentation suite.



Dashboard

A single, user-friendly home screen bringing together upcoming appointments, pending assessments, recent documents, and quick navigation. Designed for ease of use across all devices and patient demographics.



Appointment Management

Patients can view upcoming and past appointments, cancel, and reschedule — all within rules configured by the Trust. Trusts control which appointment types are actionable, how far in advance changes can be made, and how many times a patient may cancel or reschedule.



Microsoft Teams Consultations

Patients with virtual appointments can access their Microsoft Teams consultation link directly through the Trust's PEP. When accessing PEP via the NHS App, virtual appointments will display as Virtual — the Teams link is not available within the NHS App and patients must use the Trust PEP directly.

Requires a Rio licence for online consultations.



Notifications & Reminders

Automated email notifications keep patients informed at every stage — from onboarding and registration through to new appointments, cancellations, reschedules, new documents, and new assessments.



Pre & Post Assessments

Clinicians link assessment forms to appointment activities in Rio. Those forms are surfaced automatically to patients in PEP before or after their appointment. Patients complete them digitally and submissions are returned directly to the clinical record — no paper, no manual handling.



Document Management

Letters and clinical communications sent via Rio are made available to patients securely within PEP. Patients are notified when a new document is available and can view or download it at any time — reducing reliance on post and improving access to important information.



Authentication & Security

Patients can log in via a secure native login with multi-factor authentication, or using their existing NHS Login credentials. Trusts can configure which login options are available. Sessions are managed securely with automatic inactivity timeouts.



Proxy Access

Proxy access allows an authorised individual — such as a carer or family member — to manage the portal on a patient's behalf. This is supported via existing Rio personal carer tooling, with proxy invitations sent automatically by email.

Configuration guidance: Each of these feature areas is supported by dedicated configuration documentation — covering Rio EPR setup, preference layers, email notification templates, and assessment form configuration. See the supporting documentation section at the back of this guide.

WHAT'S COMING

The road ahead

The enhancements below give a picture of where PEP is heading — from improvements to everyday patient interactions through to new reporting capabilities and richer clinical data access. Please speak to your Access representative for the latest position on any specific capability.

ROADMAP SAFE HARBOUR STATEMENT

This document is intended to outline our general product direction and is for information purposes only. It is not a commitment to deliver any material, code, or functionality. The development, release, and timing of any features or functionality described for Access products remains at the sole discretion of the Access Group and are subject to change without notice.

Key: NOW NEXT LATER



NOW

Appointment Management

Planned enhancements include extending self-service cancellation to HCP diary appointments, and improvements to how virtual appointment information is displayed within PEP — giving patients clearer guidance when preparing for and joining online consultations.



NOW

Registration and Authentication

A range of improvements are planned across the registration and authentication journey — including configurable registration link validity windows, date of birth verification at sign-up, enhanced authenticator app compatibility, patient-managed email address updates, and improved handling of patient record merges within Rio.



NOW

Assessments and Forms

Planned improvements include the ability to send forms to patients outside of the appointment journey, supporting more flexible clinical data collection. Alongside this, improvements to assessment form setup and display within PEP will create a cleaner, more consistent experience for both clinicians and patients.



NEXT

Reporting and Analytics

Trust teams will have the ability to report on patient engagement portal activity via dedicated dashboards — from key usage metrics and patient adoption through to advanced engagement analytics — supporting informed decisions around portal performance and the impact of PEP on service delivery.



NEXT

Trust Administration

Trust administrators will have access to self-service admin tooling within PEP, including the ability to manage patient access, reset credentials, and support users — reducing reliance on support requests and giving Trust teams greater control over day-to-day portal management.



NEXT

Notifications and Communications

Patients will have the ability to receive PEP notifications via SMS across all notification types — broadening communication channel choice and improving reach for appointment reminders, updates, and other portal communications.



LATER

Medical Records and Information

Patients will be able to view relevant medical information within PEP via RIV, supporting greater transparency and helping patients stay better informed about their own health records — without needing to contact their clinical team directly.



LATER

Parent Information Portal

As part of a growing suite of portals, a dedicated Parent Information Portal is planned to support parents and guardians in accessing relevant health information and communications for the children in their care.

COMMERCIAL NOTICE — ROADMAP MODULES

Some or all of the modules listed on this roadmap may be chargeable and subject to a separate Contract Change Notice (CCN) and associated costs. Pricing and commercial terms for planned functionality have not yet been finalised. Please speak to your Access representative for the latest information on commercial arrangements before making purchasing decisions based on planned capabilities.

💡 SHARE YOUR IDEAS

Have a feature or enhancement you'd like to see in PEP? Log your ideas on the [Patient Engagement Portal Ideas Portal](#). You will need a user account for your Trust — speak to your Access representative for access.

SUPPORTING DOCUMENTATION

Everything you need to get started

PEP is supported by a full suite of configuration and reference documentation, designed to guide NHS Trust administrators through every aspect of setup and ongoing management. The guides below are shared alongside this document as part of your onboarding pack.



Appointment Configuration & Flow Guide

A detailed walkthrough of how appointment preferences are configured in Rio, resolved by the Elemental backend, and presented to patients in PEP — including the reschedule flow, slot search behaviour, and button visibility logic.

FOR: NHS TRUST ADMINISTRATORS · IMPLEMENTATION TEAMS



PEP Email Notifications Reference Guide

Covers every automated email notification sent by PEP — what triggers each one, when it is sent, what it contains, and how link expiry works for onboarding and proxy invitation emails.

FOR: NHS TRUST ADMINISTRATORS · COMMUNICATIONS LEADS



Assessment Form Configuration Guide

Step-by-step guidance for creating and configuring clinical assessment forms in Rio so they appear correctly in PEP — covering form creation, mastertable mapping, activity linking, and reminder configuration.

FOR: NHS TRUST ADMINISTRATORS · CLINICAL SYSTEMS TEAMS



PEP Letters & Document Types Configuration Guide

How to map document types to PEP using the document types mastertable in Rio, and how to control which document types are visible to patients in the portal.

FOR: NHS TRUST ADMINISTRATORS · RIO SYSTEM MANAGERS



PEP Proxy Access Configuration Guide

How to configure proxy access in Rio to allow an authorised individual to manage PEP on a patient's behalf — covering Rio setup, the invitation workflow, and the proxy user experience within the portal.

FOR: NHS TRUST ADMINISTRATORS · CLINICAL LEADS



PEP Rio EPR Configuration Guide

Covers the layered Rio preference model in full — EL Default, EL Teams, and EL Clinics configuration. Explains how appointment visibility, cancellation rules, reschedule limits, and the tri-state value system work in practice.

FOR: NHS TRUST ADMINISTRATORS · RIO SYSTEM MANAGERS

This product guide is intentionally high level — it is designed to give decision-makers and stakeholders a clear picture of what PEP offers. The configuration guides listed above contain the technical detail needed to implement and manage each feature area. Your Access representative can help identify which guides are most relevant for your team.

Ready to empower your patients?

Speak to your Access representative to find out how the Access Rio Patient Engagement Portal can be configured for your Trust — and what your implementation journey looks like.

Rio

Integrated directly with your EPR

WCAG

2.1 Level AA accessibility compliant

NHS

NHS Login & App Assured

24/7

Patient access on any device

