



EMIS Web user guide for GP practices | Setting up proxy access for care staff authorised to access residents' GP online records

Before you start

- Have an up-to-date resident list/report available
- Scan and save all staff and resident authorisation forms

NOTE: If you have already set up authorised care staff as proxy users for ordering medication, go to **Search.**

Select the online user already set up in the system and add additional access via the **Access** screen from step **2e**.

Complete the **Relationship to patient** field by ticking/unticking the services not needed by the proxy user.

Update Legal basis.

Consent must be given by the patient/resident (or their representative) before further access to the GP record is set up for care staff. There must also be an agreement between the care home and GP practice for this.

Setting up a new proxy user account for authorised care staff

Step 1 | setup the proxy

- Access the registration screen in EMIS
- Select the required patient
- On the registration screen, click the **Online Services Tab** within the patients record in the registration screen
- Click Add online user
- Click Add proxy user





• On the user trace screen, complete the marked * fields and click Find

e user trace					
lect an existing online user.					
race criteria Family name Date of birth Enter a date	* Given name Postcode		Gender	T	Find
nline user (0) Local patients (0) Name / Address		Account ID	Sex	Date of birth	Account Status
				ОК	Cancel

Proxy users must be set up **without** an **NHS number**. This is to make sure that the authorised care staff are not added as a new patient at the GP practice so that they are not included in population reporting or generate a 'price per patient' payment to the practice.

Step 2 | staff already registered as patients at a GP practice

If the proxy user is a registered patient **a new account must be created for them without an NHS number** so that the patient's information is **not linked** to their personal account. This only needs to be **done once.**

a) Click create a new account

race criteria								
 Family name 	mouse		* Given name	mickey	* @	ender Male	•	Find
Date of birth	Enter a date	Ħ	Postcode		Acco	unt ID		
nline user (1) Loca	l patients (0)							
					Account ID	Sav	Date of hirth	Account Statu
Name / Address	Ar)				Account ID 67320004518	Sex Male	Date of birth 01-Jan-1943	Account Statu
Name / Address MOUSE, Mickey (N		mow. CM6 1BH						
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Name / Address MOUSE, Mickey (N		imow. CM6 1BH						
Name / Address		imow. CM6 1BH						





b) You will need to select the account, without an NHS number, to link to care home residents' accounts

	race criteria	Trace criteria								
Family name Taylor Given name Alison Gender Female Online user (1) Local patients (3) Name / Address Account ID Sex Date of birth Account Account ID Sex Date of birth Account	Family name Taylor Siven name Alison Gender Female Find Date of birth Enter a date Postcode Account ID Sex Date of birth Account ID Sex Date of birth Account ID Sex Date of birth Account Sta MATOR Alison Miss Account ID Sex Date of birth Account Sta MATOR Alison Miss	Family name Taylor Given name Alison Gender Female Find Date of birth Enter a date Postcode Account ID Sex Date of birth Account Sta Account ID Sex Date of birth Account Sta Account ID Sex Date of birth Account Sta Accoun	elect an existing o	nline user.						
Date of birth Enter a date Postcode Account ID Online user (1) Local patients (3) Name / Address Account ID Sex Date of birth Account ID Sex Date of birth Account ID Sex IDate of birth	Date of bith Enter a date Postcode Account ID Online user (1) Local patients (3) Name / Address Account ID Sex Date of bith Account Sta NATOR Alison (Miss) RM7 ODS Account ID Sex Date of bith Account Sta Inactive Inact	Date of birth Enter a date Postcode Account ID Online user (1) Local patients (3) Name / Address Account ID Sex Date of birth Account Sta Account ID Sex Date of birth Account Sta Account ID Sex Inactive Inacti	Trace criteria							
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Name / Address Account ID Sex Date of birth Account IAVLOR, Alison (Miss) 46152014107 Female Inac	Name / Address Account ID Sex Date of birth Account Sta NAV.OR. Alison (Miss) 46152014107 Female Inactive	Name / Address Account ID Sex Date of birth Account State AXIOR. Alison (Miss) 46152014107 Female Inactive	Date of birth	Enter a date	Postcode		Accou	unt ID		
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TAYLOR, Alison (Miss) 46152014107 Female Inac	IAVLOR, Alison (Miss) Account of the second of	TAYLOR, Alison (Miss) Account of the second of	Jnline user (1) Loca	patients (3)						
	RM7 0DS	RM7 0DS	Name / Address		-		Account ID	Sex	Date of birth	Account Statu
				iss)			46152014107	Female		Inactive
) If you don't see the online user you're looking for, you can <u>create a new account</u> for them.								_
) If you don't see the online user you're looking for, you can <u>create a new account</u> for them.								
		If you don't see the online user you're looking for, you can <u>create a new account</u> for them.								
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If you don't see the online user you're looking for you can create a new account for them.	If you don't see the online user you're looking for, you can create a new account for them.									

c) In **Details**, fill in demographics fields. You must verify the email address. Then click **Next**

Online user							Х
Details		Online user: MOUSE, Mickey					
ID Verification		Demographics					-
Access		* Title		•			
Legal basis	۲	* Family name	mouse				
		* Given name	mickey				
		* Gender	Male	•]		=
		* Date of birth	Enter a date	Ħ]		
		Main Language		•]		
		Contact details					
		* Primary email address					
		Email verification	Unverified	•]		
		Other contact information					
		House name/Flat number					
		Number and street					
		Locality					
		Town/city					
		County		•			:
		Postcode					
		Home telephone					
		Mobile telephone					Ļ
			Back	Next	ОК	Cancel	5
			Dack	INEXT		Cancel	





d) In the ID verification screen, click Add to add the verification document from the staff member already saved. Click Next

Online user				×
Details	0	Online user: MOUSE, Mickey		
ID Verification	۲	Verifications		
Access	٢	Add a new identity document for this online us	er.	
Legal basis	۲	🚯 Add 🗹 Edit 🗶 Delete		
		Method Additional information	Document Type	Date
		Back	Next	OK Cancel

e) In the Access screen, complete the Relationship to patient field. Then tick/untick the Services and levels of Records access agreed for the authorised proxy user. Click OK

Online user			
Access		Online user: TAYLOR, Ali	son (Mrs)
Legal basis	۲	Linked patient	
		Patient	MOUSE, Micky (Mr)
		* Relationship to patient	Carer v
		Services	
		 Appointments 	🏲 Requested
		 Repeat prescriptions 	
		Messaging	
		 Demographics 	





Online user			
Access		Online user: TAYLOR, Alison (Mrs)	
Legal basis	٢	Record access	
		No care record access	
		 Disable all care record access 	
		Online user will not be able to access the patients care record data online.	
		Core summary care record	
		 Use core summary care record settings 	
		Core Summary care record will give the online user access to the patients medi	ications and allergies.
		Detailed coded record	
		 Use detailed coded record settings 	
		Detailed coded record will allow you to choose which services the online user of	an use.
		Services	
		Allergies (Mandatory)	🏲 Requested
		Medication (Mandatory)	🏲 Requested
		✓ Laboratory test results	🏲 Requested
		Display free text from:	
		✓ Documents	🏲 Requested
		Only show documents from:	

nline user				
Access		Online user: TAYLOR, Alison (Mrs)		
Legal basis	٢	Detailed coded record Use detailed coded record settings Detailed coded record will allow you to	choose which services the online	e user can use.
		Services		
		Allergies (Mandatory)		🏲 Requested
		 Medication (Mandatory) 		🏲 Requested
		✓ Laboratory test results		🏲 Requested
		✓ Display free text from:	01-Jan-2020	🏲 Requested
		☑ Documents		🏲 Requested
		Only show documents from:	01-Jan-2020 🏛	🏲 Requested
		✓ Display free text from:	01-Jan-2020 🎞	🏲 Requested
		✓ Immunisations		🏲 Requested
		✓ Problems		🏲 Requested
		✓ Display free text from:	01-Jan-2020	🏲 Requested
		✓ Consultations		🏲 Requested
		Only show consultations from:	01-Jan-2020	🏲 Requested
		✓ Display free text from:	01-Jan-2020	> Requested





Access		Online user: TAYLOR, Alison (Mrs)		
Legal basis	٢	Laboratory test results Display free text from: Documents Only show documents from: Display free text from: Display free text from: Immunisations	01-Jan-2020 01-Jan-2020 01-Jan-2020	 Requested Requested Requested Requested Requested Requested
		Immunisations Problems Display free text from: Onsultations Only show consultations from: Display free text from:	01-Jan-2020 01-Jan-2020 01-Jan-2020	r Requested Requested Requested Requested Requested Requested
		Record sharing Record sharing allows online users to shar provider. Record access must be configured Record sharing		

f) Click Legal basis screen, then click Update legal basis. Click OK

Access	0	Online user: TAYLOR, Alise	n (Mrs)			
Legal basis	۲	Legal basis				
		Access to the following servic needed for TAYLOR, Alison (N			been request	ed. Legal basis is
		 Appointments 		 Allow access 	⊖ Reject	 Decide later
		 Detailed coded record 		 Allow access 	⊖ Reject	 Decide later
		Documents from: Documents free te Immunisations Problems Problems free text Consultations fror	e text from: 01/01/2020 01/01/2020 xt from: 01/01/2020 from: 01/01/2020			
		Legal basis type Metho	d Additional in	formation		Date
		Explicit consent Writte				<u>View</u> () 29-Nov-2019
			Back	Next		OK Cancel





g) From the Legal basis type drop down list, select Explicit consent for Method, select Written or Verbal. If written, you must upload the patient authorisation form which is already on their record; or you can choose verbal and add a note. Click OK/Next/Save as per on screen instructions

Online user	×
Access	Add legal basis
Legal basis	Legal basis options. * Legal basis type * Method Written
s	Date EW 10 29-Nov-2019
	Next Cancel
	Back Next OK Cancel

Online user			×
Access	۲	Online user: TAYLOR, Alison (Mrs)	
Legal basis	٢	Legal basis	
_		Access to the following services on MOUSE, Micky (Mr)'s account have been requested. Legal basis is needed for TAYLOR, Alison (Mrs) to access these services. Update legal basis • What is legal basis?	
		Legal basis type Method Additional information Date	
		Explicit consent Written . <u>View</u> 29-Nov-2019	
		Explicit consent Written Additional consent form is needed for acc View 👩 06-Oct-2020	
		Back Next OK Cancel	

- h) Click Save
- i) If Legal basis appears again, click Not now, then OK





Step 3 | Issue PIN document

Issue PIN documents by selecting **Email PIN** via the radio button on the screen where prompted. Ensure the user has a verified primary email address recorded before issuing the PIN.

Here's an example of the message the new proxy will receive:

Online Services for Alison Taylor

You have requested access to online services.

Accessing online services

To access online services:

1. Create an account with one of the following service providers:

Service provider	Website
Patient Access	https://www.patientaccess.com

2. Provide the following online services account details when prompted:

Linkage Key	
ODS Code	
Account ID	

 $\ensuremath{\textbf{Note:}}$ The account details are unique to you and were provided by John Tasker House Surgery

Step 4 | Active online services account is created

The online user account is created with an account status as **Active**, enabling the user to start accessing the information in the GP record by proxy once they have activated their account. This can be viewed under **Account status** in the online user screen.

Active ¥ XXTESTPATIENT-TKHA, Don	otuse (Mr)	an-1947 (72y) Gender Male EE, Mike (Dr)	EMIS No. 506489	OS PROXY PDS
1. Demographics 2. Additional 3. Online Services	4. Family / Relationship Links 5.	Status History 6. Audit History 7. (GP2GP	
🛟 Add online user 🏼 🎆 Unlink user				
Online user	Relationship	Link status	Account status	
💈 McLaughlin, Heather (Mrs)	Carer	Link restricted	Live	<u>View online user</u>
👵 Deakin-Faux, Kirsty (Mrs)	Carer	Link restricted	Live	View online user
🚨 Taylor, Alison (Mrs)	Carer	Link restricted	Live	View online user





Step 5 | repeat for each patient

Repeat the above steps for each patient the proxy user is authorised to access. You do not need to create a new user when setting up access to additional patients. You should use the proxy user that has just been created.

* Family name Taylor * Given name Alison * Gender Female V Find Date of birth Enter a date Image: Constraint of the second s						
Date of birth Enter a date Postcode Account ID Inline user (1) Local patients (3) Name / Address Account ID Sex Date of birth Account ID Sex Date of birth Account Statistical Account	race criteria					
Inline user (1) Local patients (3) Name / Address Account ID Sex Date of birth Account ID Sex TAYLOR, Alison (Miss) 46152014107	* Family name Taylor	* Given name Alison	* @	ender Female	~	Find
Name / Address Account ID Sex Date of birth Account Sta TAYLOR, Alison (Miss) 46152014107 Female Inactive	Date of birth Enter a date	Postcode	Acco	unt ID		
TAYLOR, Alison (Miss) 46152014107 Female Inactive	nline user (1) Local patients (3)					
	Name / Address		Account ID	Sex	Date of birth	Account Statu
KM7 0DS			46152014107	Female		Inactive
	KM7 0DS					
If you don't see the online user you're looking for, you can <u>create a new account</u> for them.	If you don't see the online year you're lo	bling for you can greate a new account. for the				





Search for online user - removing an authorised care staff proxy

When authorised care home staff leave or to update access, search for the user.

ems		° ‰ 🔯 ◀ 🎖 ≫ 🗉	•				EMIS We	b Health Care System - Nor	th Street Medical Care - 14	107
Privation Carees Online user Find crime Edit Close Genail PIN Counter Privation Find Edit Close Genail PIN Counter Privation Find Edit Close Pind actine Find Edit Close Pind actine										
(Report Management - 7 SCR - 12 Documents - 2 Medicine Management - 6 (6) Registration - 1097 (90) Lab Reports - 59 (21) Tasks - 2 (1)									
<u> </u>	 You have 1 screen message. Click this link to view. New priority Workflow Items received - Tasks, Lab Reports, Registration, Medicine Management 									
	Online use: TAYLOR, Alison (Mrs)									
	or, Alison (Pirs)									
Demographics		Contact details	1	Online user trace						×
	Mrs	House name/Flat number		Select an existing o	online user.					
	taylor	Number and street		Trace criteria				1 .		
Given name	Alison	Village		* Family name		* Given name			Female Y	Find
Date of birth	24-Dec-1974	Town/city		Date of birth	Enter a date	Postcode		Account I	D	
Main Language		County		Name / Address				Account ID Se	< Date of birt	h Account Status
		Postcode								
Status										
Account status	Active	Home telephone								
		Mobile telephone								
		Email address	alison.ta							
									0	DK Cancel
Linked patients										
Fdit online user a	access 📑 Legal basis									

• Click on user's name and Select

(ems/	8 < ≚ 2 ∢ 8 > ⊞ ∐)	€ EMIS Web Health Care System - North Street Medical Care - 14107				
Registration Carers Online						
Find online user Edit Close Identity user account verification						
Find Edit online user PIN document Account key						
Report Hangement -7 SCR -12 Documents -2 Medicine Management -6 (6) Reports -1997 (90) Lab Reports -59 (21) Tasks -2 (1)						
<u> </u>	You have 1 screen message. Click this link to view.					
New priority Workflow Items re-	🔶 New priority Workflow Items received - Tasks, Lab Reports, Registration, Medicine Management					
Online user: TAYLOR, Alison (Mrs)						
Demographics	Contact details	Online user trace ×				
Title Mrs	House name/Flat number	Select an existing online user.				
Family name taylor	Number and street	Trace criteria				
Given name Alison	Village	Family name Taylor Given name Alison Gender Female Find				
Date of birth	Town/city	Date of birth Enter a date Postcode Account ID				
Main Language	County	Name / Address Account ID Sex Date of birth Account Status				
	Postcode	TAYLOR, Alison (Mrs) 46301014107 Female Active				
Status						
Account status Active	Home telephone					
	Mobile telephone					
	Email address					
		Select Cancel				
Linked patients						





• Click on Close account

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Registratio	on Carers Online us	sers	
Find online user Edit user		Image: Print PIN Image: Pint PIN Image: Print and email PIN Reset account key PIN document Account key	
Report Manageme	ent - 7 <u>SCR</u> - 12	Documents - 2 Medicine Management - 6 (6) Registration - 1097 (90) Lab Reports - 59 (21)	Task
Mou have 1	screen message. Clic	ck this link to view.	
🚸 New priorit	y Workflow Items recei	ived - Tasks, Lab Reports, Registration, Medicine Management	
0-li			
Online user: TAY	'LOR, Alison (Mrs)		
Demographics	i	Contact details	
Title	Mrs	House name/Flat number	
Family name	taylor	Number and street	
Given name	Alison	Village	
Date of birth		Town/city	
Main Language		County	
		Postcode	
Status			
	Active	Home telephone	
		Mobile telephone	
		Email address Verified	

- Select a reason for closing this account, as appropriate
- Click Close account

ems Carers Online users	✓ ★ ■ ◀ ♂ > ■ ■) *	EMIS Web Health Care System - North Street Medical Ca
Find online Bind online User Find Edit online user	IPrint PIN JEmail PIN Print and email PIN PIN document Account key Account key	(1)
	Tasks, Lab Reports, Registration, Medicine Management	
Demographics Title Mrs Family name taylor Given name Alison Date of birth Main Language Status Account status	County - MOUSE, Micky Postcode If you close this a linked to this onlin	ccount, the above patient(s) will no longer be ne user. closing this account:
	Email address Verified	Close account Cancel