

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**

Online user trace

Select an existing online user.

Trace criteria

* Family name * Given name * Gender Find

Date of birth Enter a date Postcode Account ID

Online user (0) Local patients (0)

| Name / Address | Account ID | Sex | Date of birth | Account Status |
|----------------|------------|-----|---------------|----------------|
| (Empty table) | | | | |

OK 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**.

- Click **create a new account**

Online user trace

Select an existing online user.

Trace criteria

* Family name mouse * Given name mickey * Gender Male Find

Date of birth Enter a date Postcode Account ID

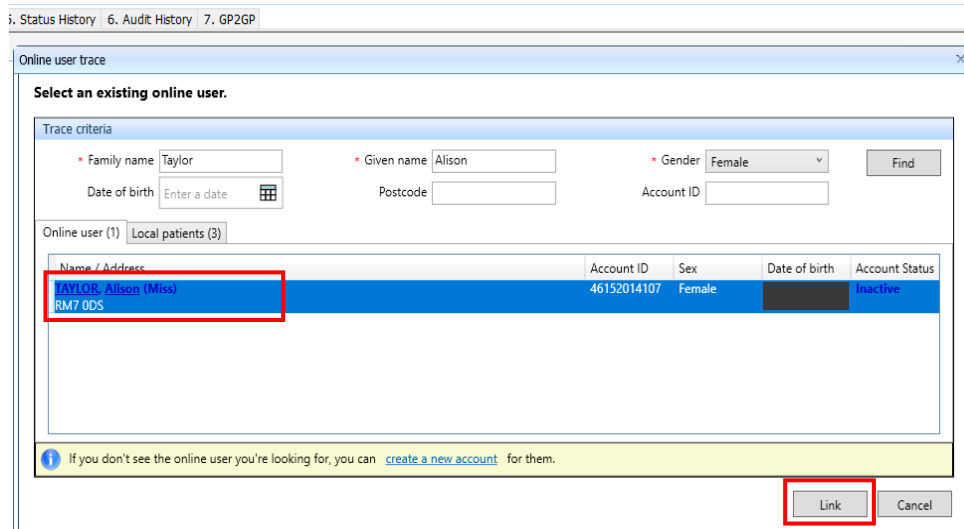
Online user (1) Local patients (0)

| Name / Address | Account ID | Sex | Date of birth | Account Status |
|--|-------------|------|---------------|----------------|
| MOUSE, Mickey (Mr) 50 New Street, Great Dunmow, Dunmow. CM6 1BH | 67320004518 | Male | 01-Jan-1943 | Active |

! If you don't see the online user you're looking for, you can [create a new account](#) for them.

OK Cancel

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



Online user trace

Select an existing online user.

Trace criteria

Family name: Taylor Given name: Alison Gender: Female

Date of birth: Enter a date Postcode: Account ID:

Find

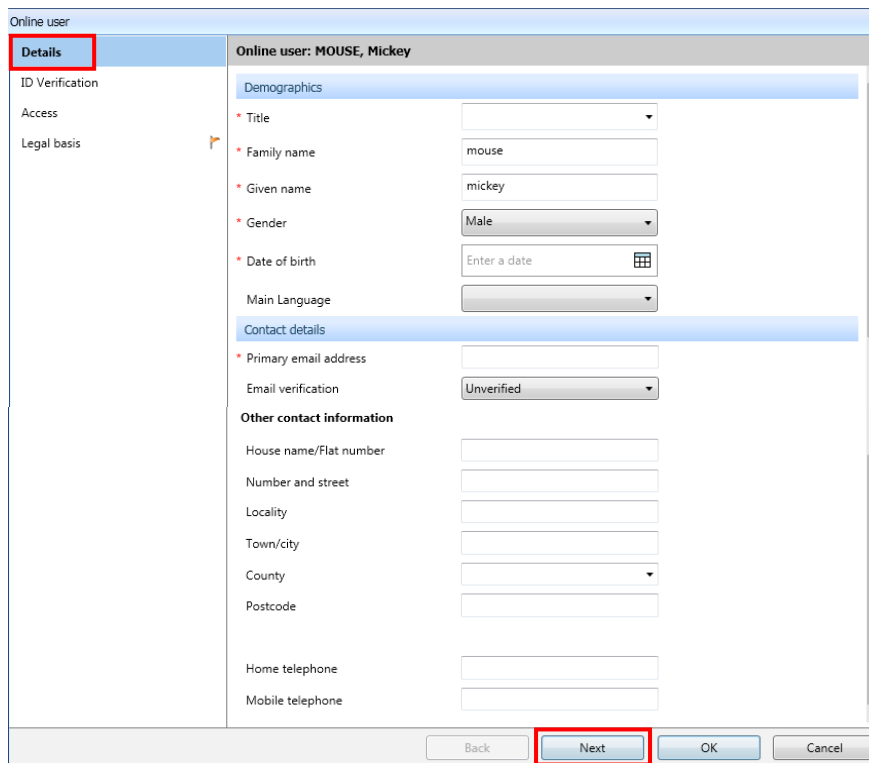
Online user (1) Local patients (3)

| Name / Address | Account ID | Sex | Date of birth | Account Status |
|----------------------------------|-------------|--------|---------------|----------------|
| TAYLOR, Alison (Miss) RM7 0DS | 46152014107 | Female | | Inactive |

If you don't see the online user you're looking for, you can [create a new account](#) for them.

Link Cancel

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



Online user

Details

Online user: MOUSE, Mickey

Demographics

Title: Family name: mouse Given name: mickey Gender: Male

Date of birth: Enter a date Main Language:

Contact details

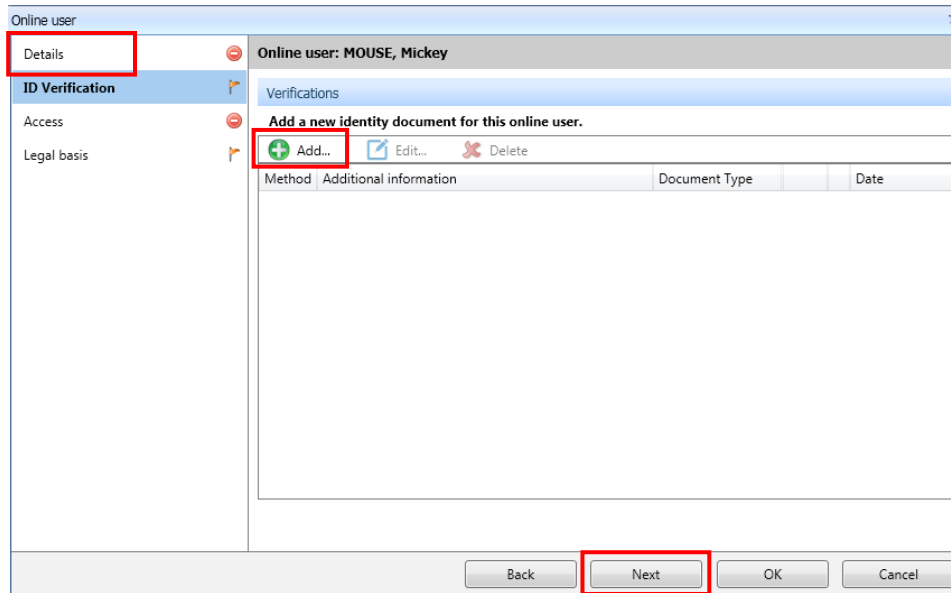
Primary email address: Email verification: Unverified

Other contact information

House name/Flat number: Number and street: Locality: Town/city: County: Postcode: Home telephone: Mobile telephone:

Back **Next** OK 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

Online user: **MOUSE, Mickey**

ID Verification

Verifications

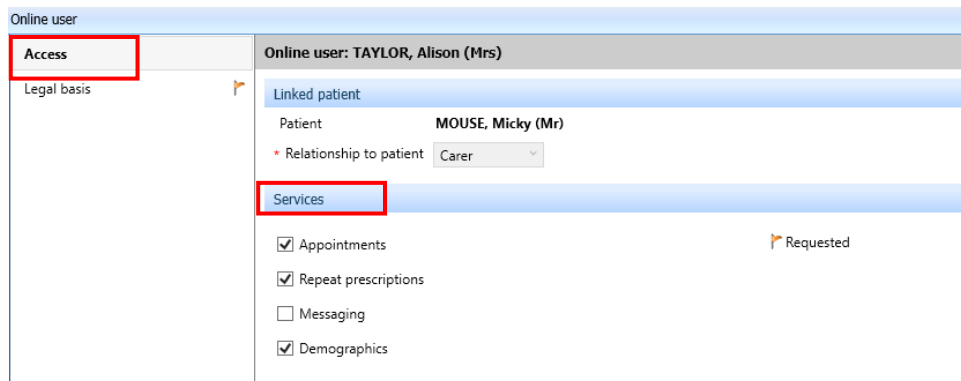
Add a new identity document for this online user.

+ 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, Alison (Mrs)**

Legal basis

Linked patient

Patient **MOUSE, Micky (Mr)**

Relationship to patient Carer

Services

Appointments Requested

Repeat prescriptions

Messaging

Demographics

Online user

Access

Legal basis

Record access

Online user: TAYLOR, Alison (Mrs)

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 medications and allergies.

Detailed coded record

Use detailed coded record settings
Detailed coded record will allow you to choose which services the online user can use.

Services

| | | |
|---|--------------|-----------|
| <input checked="" type="checkbox"/> Allergies (Mandatory) | | Requested |
| <input checked="" type="checkbox"/> Medication (Mandatory) | | Requested |
| <input checked="" type="checkbox"/> Laboratory test results | | Requested |
| <input type="checkbox"/> Display free text from: | Enter a date | |
| <input checked="" type="checkbox"/> Documents | | Requested |
| <input type="checkbox"/> Only show documents from: | Enter a date | |

Online user

Access

Legal basis

Record access

Online user: TAYLOR, Alison (Mrs)

Detailed coded record

Use detailed coded record settings
Detailed coded record will allow you to choose which services the online user can use.

Services

| | | |
|---|-------------|-----------|
| <input checked="" type="checkbox"/> Allergies (Mandatory) | | Requested |
| <input checked="" type="checkbox"/> Medication (Mandatory) | | Requested |
| <input checked="" type="checkbox"/> Laboratory test results | | Requested |
| <input checked="" type="checkbox"/> Display free text from: | 01-Jan-2020 | Requested |
| <input checked="" type="checkbox"/> Documents | | Requested |
| <input checked="" type="checkbox"/> Only show documents from: | 01-Jan-2020 | Requested |
| <input checked="" type="checkbox"/> Display free text from: | 01-Jan-2020 | Requested |
| <input checked="" type="checkbox"/> Immunisations | | Requested |
| <input checked="" type="checkbox"/> Problems | | Requested |
| <input checked="" type="checkbox"/> Display free text from: | 01-Jan-2020 | Requested |
| <input checked="" type="checkbox"/> Consultations | | Requested |
| <input checked="" type="checkbox"/> Only show consultations from: | 01-Jan-2020 | Requested |
| <input checked="" type="checkbox"/> Display free text from: | 01-Jan-2020 | Requested |

Online user

Access

Legal basis

Online user: TAYLOR, Alison (Mrs)

- 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

Record sharing

Record sharing allows online users to share care records with other individuals through their online service provider. Record access must be configured before record sharing can be enabled.

Record sharing

Back Next **OK** Cancel

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

Access

Legal basis

Online user: TAYLOR, Alison (Mrs)

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.

- Appointments Allow access Reject Decide later
- Detailed coded record Allow access Reject Decide later
 - Allergies
 - Medication
 - Laboratory test results
 - Laboratory test free text from: 01/01/2020
 - Documents from: 01/01/2020
 - Documents free text from: 01/01/2020
 - Immunisations
 - Problems
 - Problems free text from: 01/01/2020
 - Consultations from: 01/01/2020
 - Consultations free text from: 01/01/2020

Update legal basis... [What is legal basis?](#)

Previously added legal basis

| Legal basis type | Method | Additional information | Date |
|------------------|---------|------------------------|-------------|
| Explicit consent | Written | . | 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

Legal basis

Online user: TAYLOR, Alison (Mrs)

Add legal basis

Legal basis options.

Legal basis type: Explicit consent

Method: Written

Date: 29-Nov-2019

Next Cancel

Back Next OK Cancel

Online user

Access

Legal basis

Online user: TAYLOR, Alison (Mrs)

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?

Previously added legal basis

| Legal basis type | Method | Additional information | Date |
|------------------|---------|--|-------------|
| Explicit consent | Written | . | 29-Nov-2019 |
| Explicit consent | Written | Additional consent form is needed for acc... | 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 |

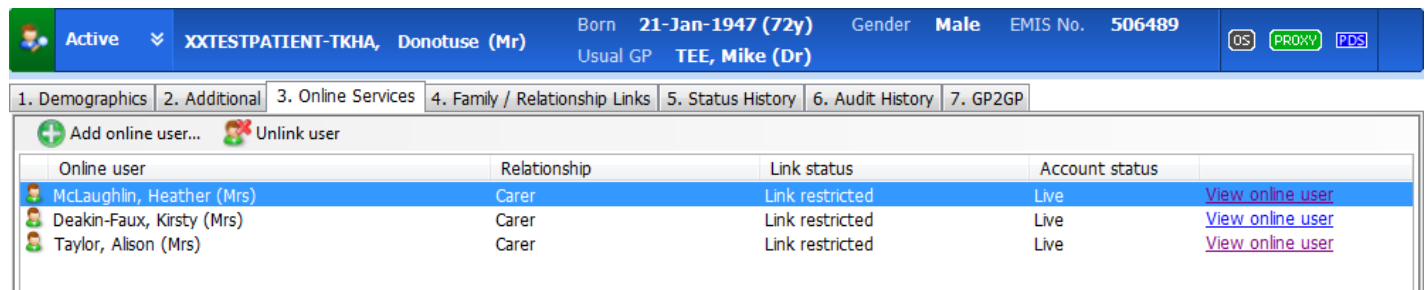
2. Provide the following online services account details when prompted:

| | |
|-------------|------------|
| Linkage Key | [REDACTED] |
| ODS Code | [REDACTED] |
| Account ID | [REDACTED] |

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.



The screenshot shows the EMIS interface for a patient named Donotuse (Mr). The patient's account status is 'Active'. The 'Online Services' tab is selected, showing a table of online users. Alison Taylor (Mrs) is listed as a carer with a 'Link restricted' status and an 'Account status' of 'Live'. A 'View online user' link is provided for each user.

| Online user | Relationship | Link status | Account status | |
|---------------------------|--------------|-----------------|----------------|----------------------------------|
| McLaughlin, Heather (Mrs) | Carer | Link restricted | Live | View online user |
| 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.

Online user trace
×

Select an existing online user.

Trace criteria

Family name
Given name
Gender
Find

Date of birth
Postcode
Account ID

Online user (1) Local patients (3)

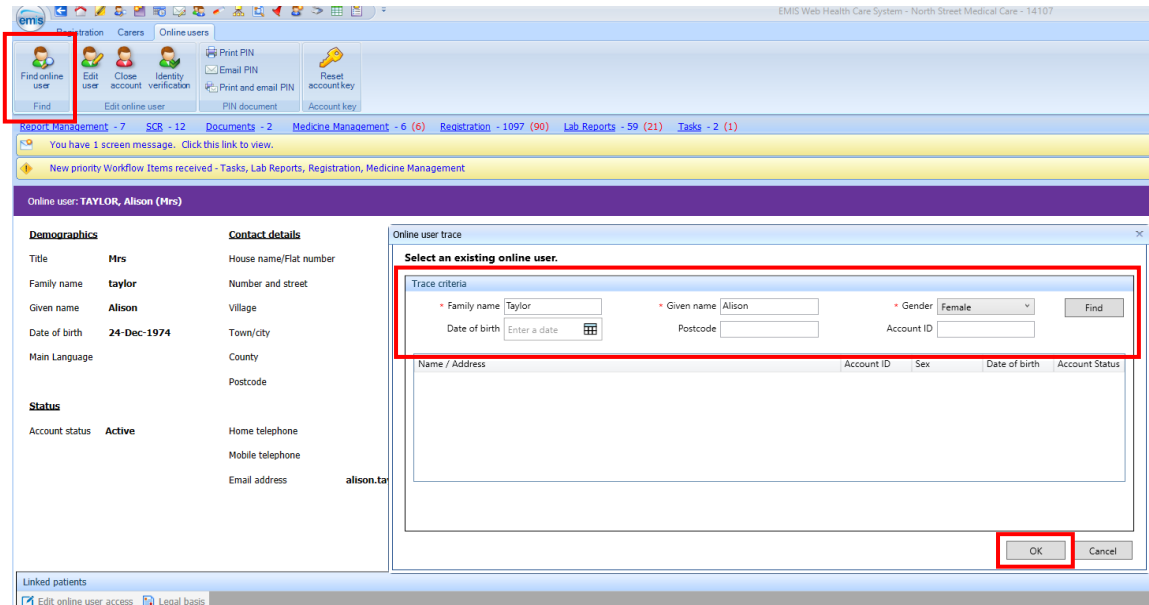
| Name / Address | Account ID | Sex | Date of birth | Account Status |
|----------------------------------|-------------|--------|---------------|----------------|
| TAYLOR, Alison (Miss) RM7 0DS | 46152014107 | Female | [REDACTED] | Inactive |

! If you don't see the online user you're looking for, you can [create a new account](#) for them.

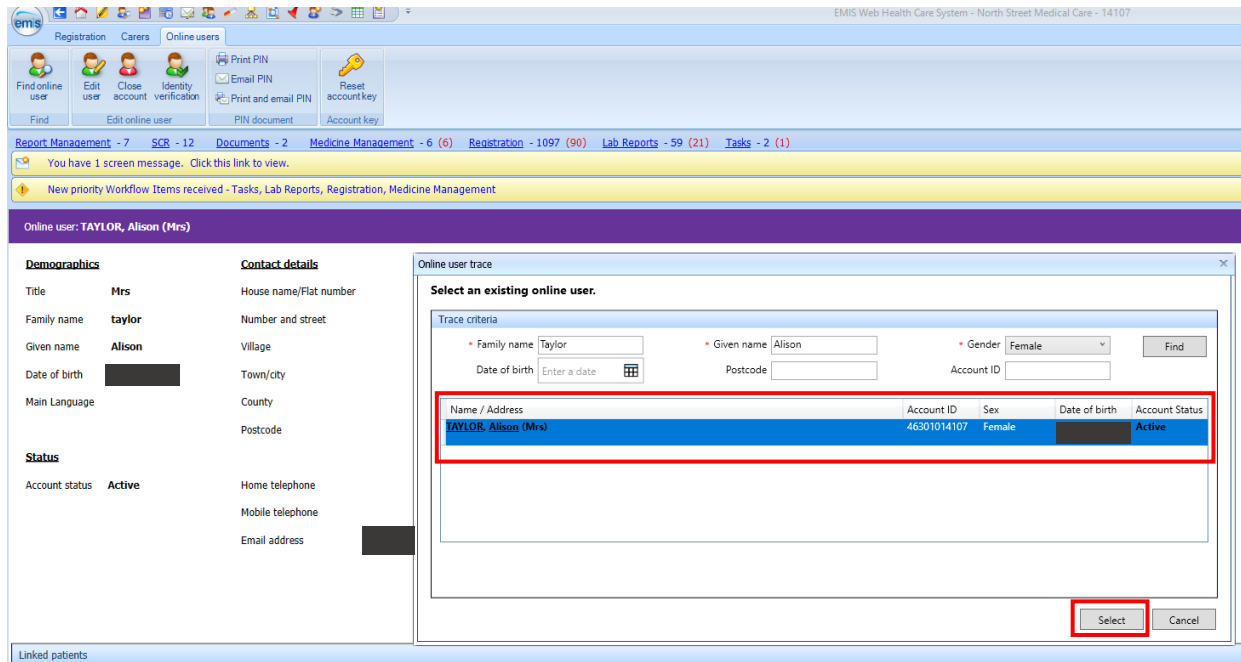
Link Cancel

Search for online user - removing an authorised care staff proxy

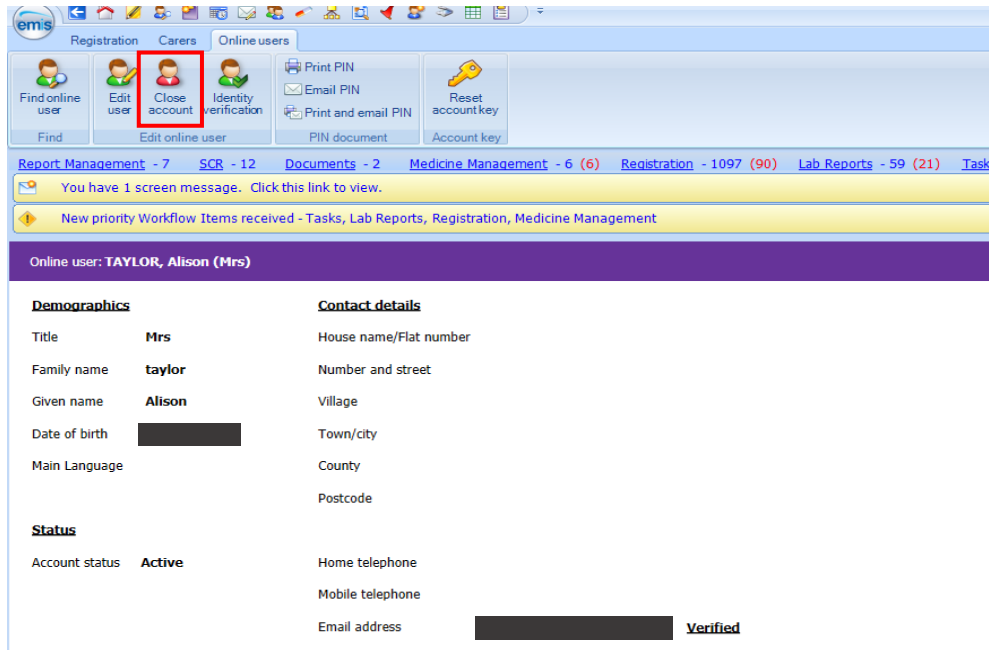
When authorised care home staff leave or to update access, search for the user.



- Click on user's name and **Select**



- Click on **Close account**



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

