TPP SystmOnline 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

- The patient needs to be set up for GP online services with at least the same level of access as the authorised care staff proxy user

NOTE: If you have already set up the authorised care staff as proxy users for ordering medication, go to **step 2,** search, and select the online user already set up in the system.

Then add additional access via the **Online Services** screen from **step 7** and follow the onscreen instructions.

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 account

Step 1

- Select **Patient Maintenance**

- Then select **New online user account**

This information will come from the application form that the care home has submitted to the practice which should be scanned and saved in the practice governance folder on the shared drive.
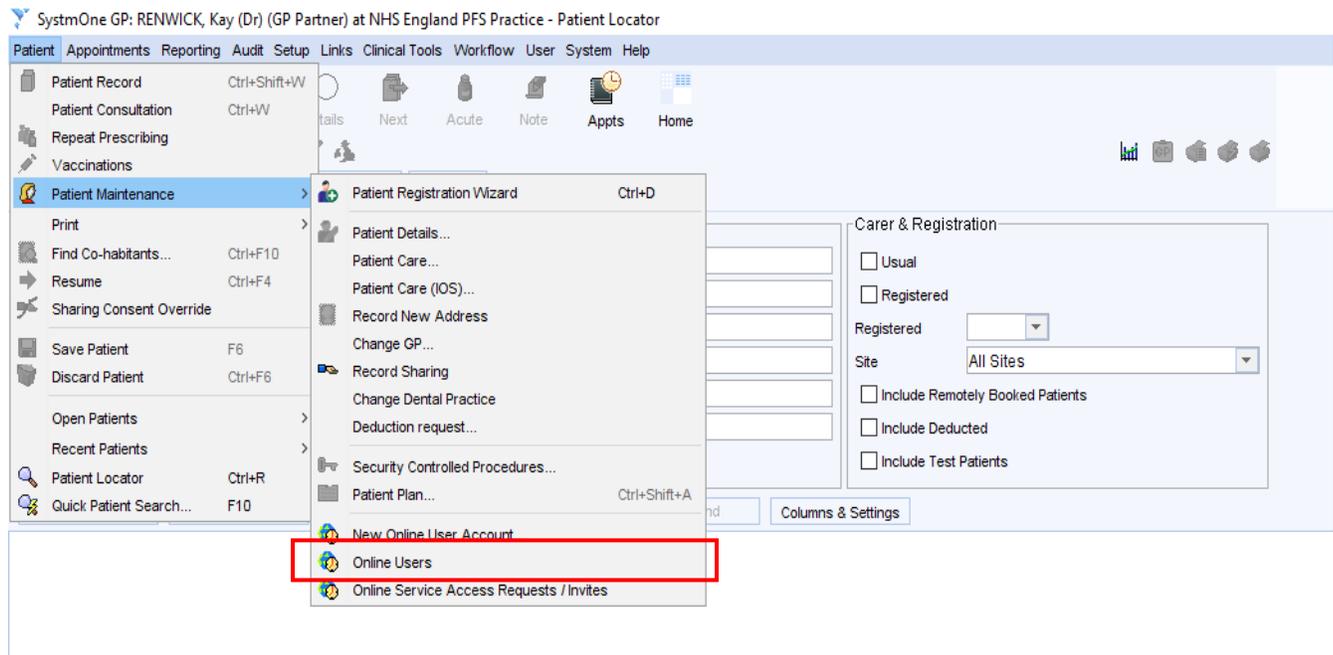
Step 2 | locate staff or create new user

NOTE: Proxy users must be setup **without** an **NHS number.** This is to make sure that care home 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.

- Search by entering the care home staff's name

There are three possible options that may be returned**:**

1. You can't find their name. Select **Not Found**

2. You find the person's name, but the record includes an NHS number. You need to create a new user and without an NHS number, select **Not Found**
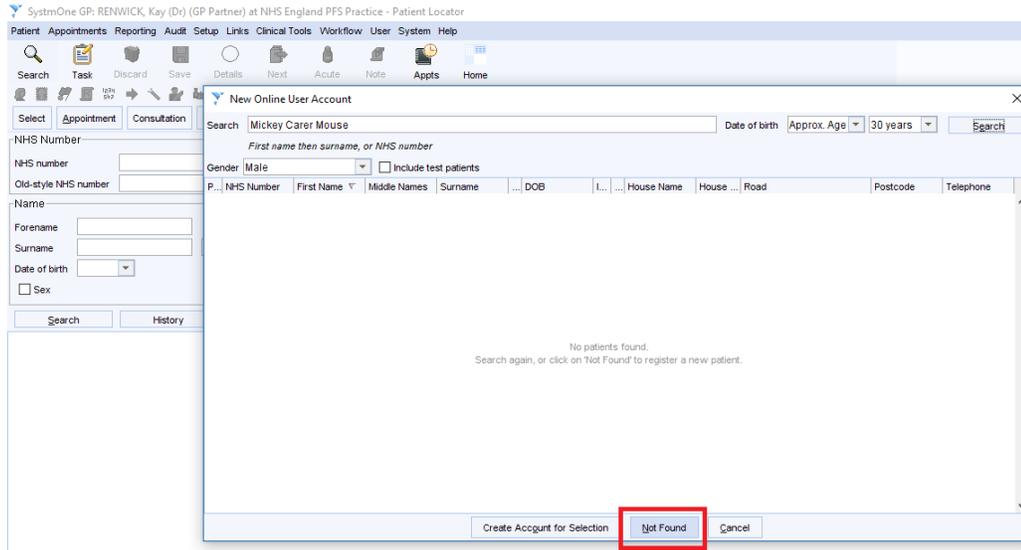
3. You find the name, without an NHS number. It's possible that the member of staff has been set up as a proxy in another TPP practice. Check you have the right person. **Select their name without the NHS number**

![tpp logo] ![NHS logo]
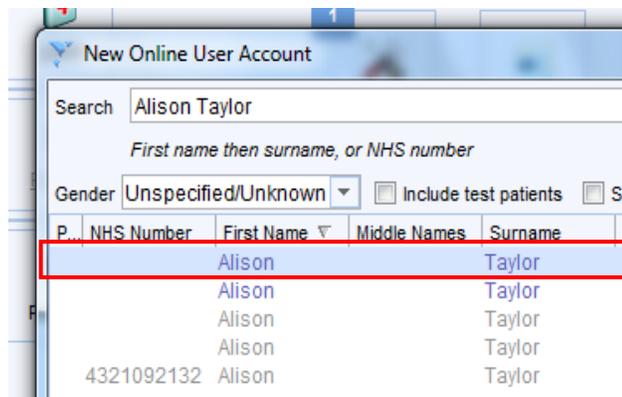
Step 3 | complete demographics

- Complete the demographic details, without an NHS number, ensuring a secure email address is completed

- Click the green button (as shown below) to start adding the care home address for this proxy user
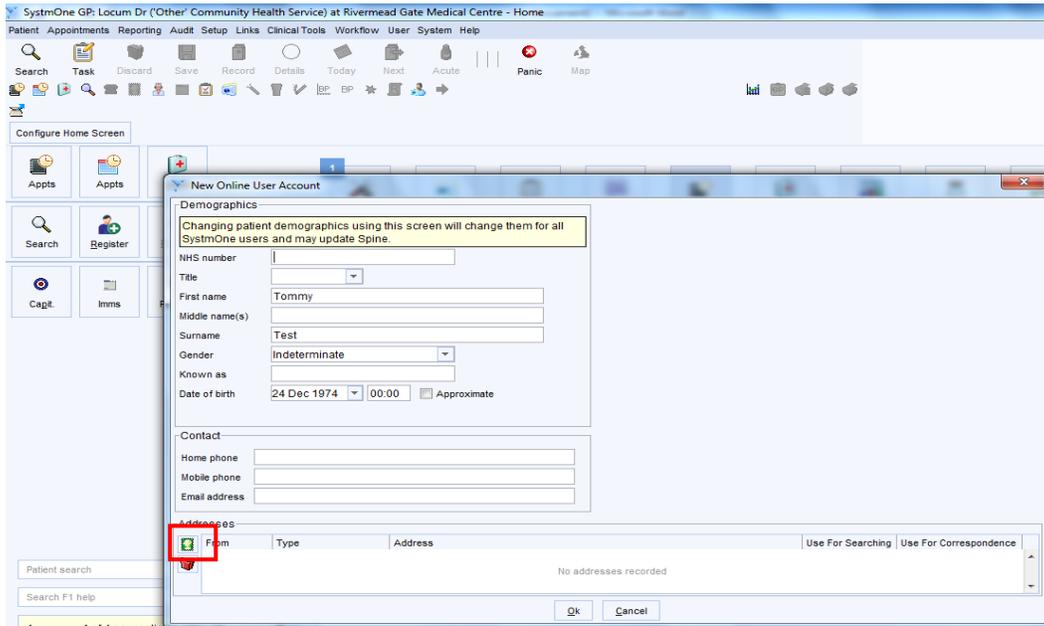
- Select **Home** as the type of address to add
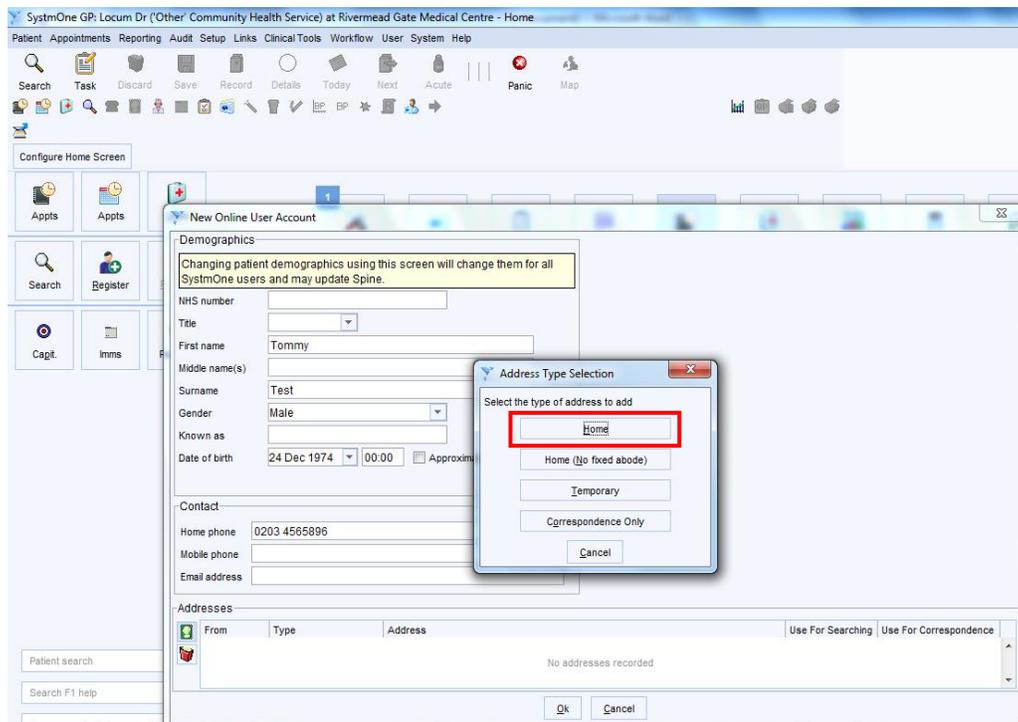
- Enter the care home address and select **OK**

Step 4 | complete user set-up

- **ID verification:** tick **Documents provided**; select **Other** and type in **'proxy form completed'**

- **Contact details:** select the **green telephone icon.** Record contact details and complete (as shown below) with secure email address and a work mobile phone number (where provided)

- **Verify the details**: ensure email is ticked as the method of receiving log in details. This means that if they forget their password, they can reset themselves online with 'forgot my password' on the log-in page

- **Online Credentials:** select **Email**. Use care staff secure email address for verification details; and select **Email** for online credentials settings

- **Select Allow the online user to access a patient's account** from the bottom left of the screen (see below)

Step 5 | link the proxy to a patient's record

- Type in the name of the patient in the **Name search** box

- Select the patient you are looking for

In the **Select Relationship Type** box:

- Select **Unclassified**, then **Unclassified,** and then **Carer**

- Select **OK**
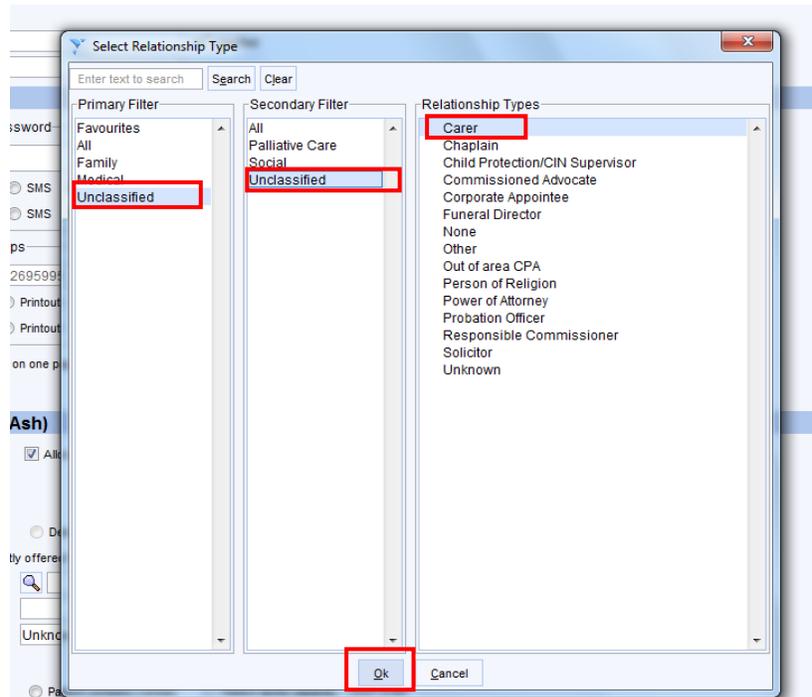
In the **Register for Online Services** screen:

- Tick/untick the online services care staff are to be given, as agreed locally

- Select **Carer** as the **Relationship to patient**

- Select one of the options from **Basis for granting access**

- Click **OK**

You can also add or remove other levels of access to that patients' record from this screen too.
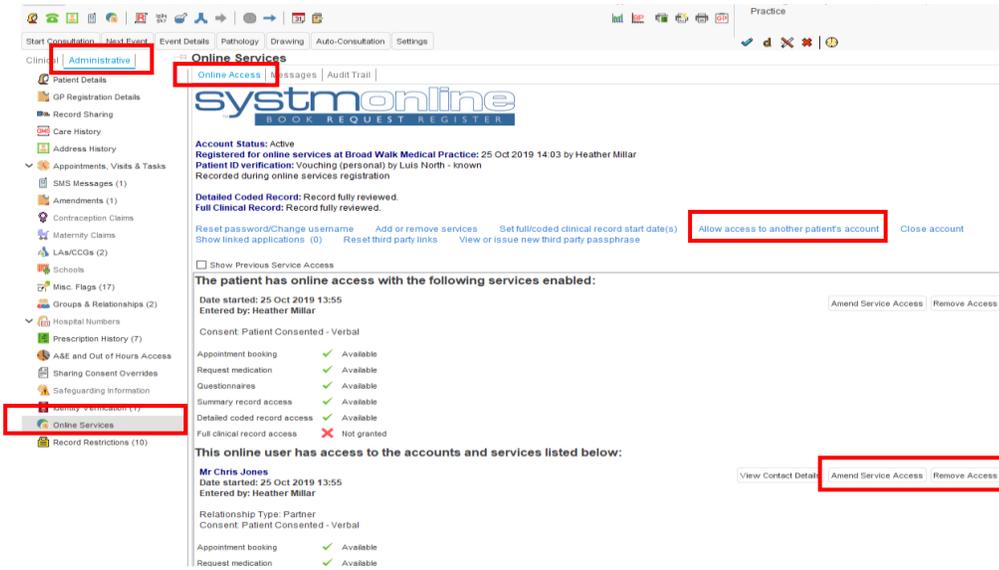
- In the screen that appears next, select **Don't inform**
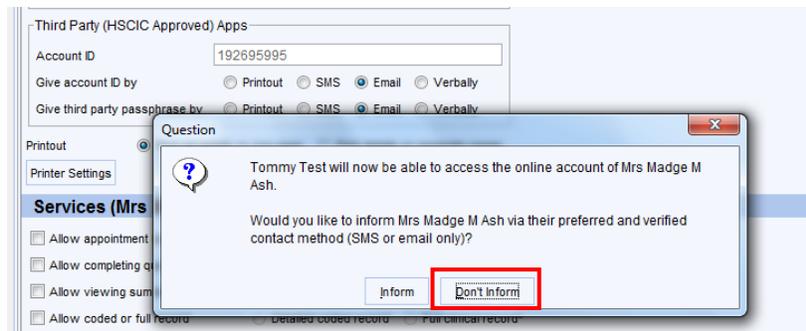
Step 6 | check the proxy set up

The next screenshot shows what services the proxy has access to for the selected patient. In our example, the authorised care worker has been given access to requesting medication only. This is also where access is removed if the care worker or patients change.
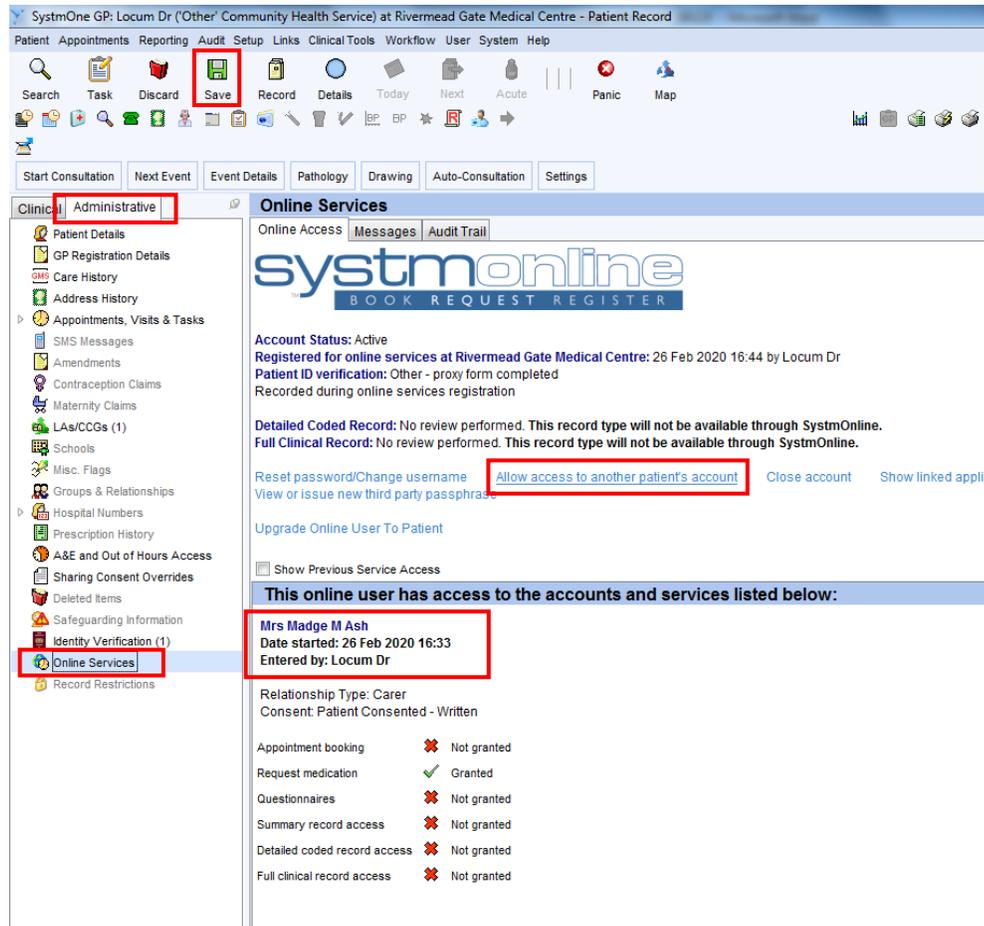
Step 7 | link the proxy to other patients' records, if required

See the screenshot above. **Select Allow access to another patient's record** and search for the patient. Repeat as above to add to the proxy user.

Click **Save** after you have added all the patients.

Adding new residents to a proxy's account

Once the online user has been set up, an email is sent to the proxy with login details.

Once they have logged on and completed the registration process by setting up new password, they can start accessing the GP record.

To add patients to a proxy's account after the user has been set up, you will need to go back to Step 7 above. When you retrieve a user's record, you can change their password and access rights here, too.

The following warning may also appear. If it does, select **OK.**
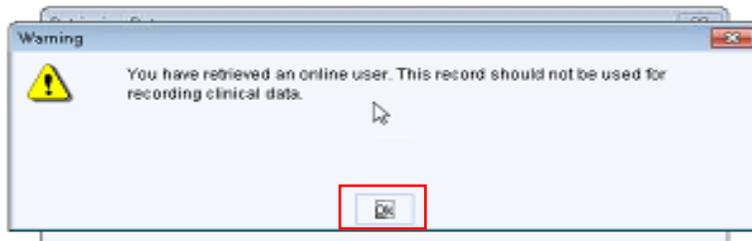
- When entering the record of the proxy (online user) the following question may display. If it does, select **No**
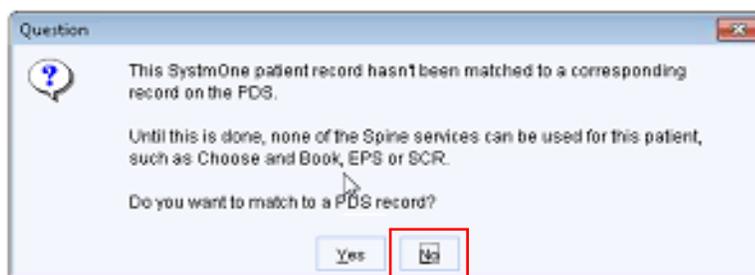
If a proxy user moves from the care home, locks themselves out of their account, and cannot reset it themselves, the account must be re-set by the practice that created them as a proxy user in SystmOne in the first place.