



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.

🍸 S	🍸 SystmOne GP: RENWICK, Kay (Dr) (GP Partner) at NHS England PFS Practice - Patient Locator							
Patier	t Appointments Reporting	Audit Setup	Link	Clinical Tools Workflow User System Help				
	Patient Record Patient Consultation Repeat Prescribing Vaccinations Patient Maintenance	Ctrl+Shift+W Ctrl+W	tails	Next Acute Note Appts Home	kti 🖮 🏟 🏟 🏟			
₩ + +	Print Find Co-habitants Resume Sharing Consent Override	> Ctrl+F10 Ctrl+F4	2	latient Details latient Care latient Care (IOS) Record New Address	Carer & Registration			
	Save Patient Discard Patient	F6 Ctrl+F6	••	Change GP	Site All Sites			
Q Q	Open Patients Recent Patients Patient Locator Quick Patient Search	> Ctrl+R F10		Change Dental Practice Deduction request Security Controlled Procedures Ratient Plan Letw Online User Account Dinline Users	Include Test Patients			
			0	Inline Service Access Requests / Invites				

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**

🍸 Systm	One GP: RE	NWICK, Ka	ıy (Dr) (G	P Partner) at NHS I	England PFS P	ractice -	Patient Loc	ator								
Patient A	ppointments	Reporting	Audit S	Setup Link	s Clinical	Tools Workflo	ow User	System H	lelp								
Q	Ŕ			0	P	- A		<u> </u>									
Search	Task	Discard	Save	Details	Next	t Acute	Note	Appts	Home								
2 🖩	# 5 %	9 🔶 🔨	20	🝸 Ne	w Online	User Account											×
Select	Appointmen	nt Consu	itation	Search	Mickey	Carer Mouse							Date of birth	Annroy Age 🔻	30 years 🔻	Search	
NHS Nu	mber			Courcil	First nar	ne then surnam	e or NHS	Snumber					Date of Milli	rippion rigo	ou youro	Dearch	
NHS num	ber		-	Gender	Male			Include test	natients								
Old-style	NHS number			P NHS	Number	First Name	Middle	Names S	Surname	DOB	I	House Name	House Road		Postcode	Telephone	
Name				-													^
Forename	•																
Surname																	
Date of b	irth	Ψ.															
Sex 🗌																	
s	earch	н	listory														
											the sector star						
									Sear	ch again, or clid	k on Not Fou	nd' to register a	new patient.				
												_	_				~
									Cre	ate Account fo	r Selection	Not Found	Cancel				
																	_

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**

			1									
	Y New Online User Account											
	Search Alison Taylor											
1	First name then surname, or NHS number											
E	Gender	Unspecif	ied/Unknown	🔹 📃 Include te	st patients	📃 Se						
	P NH	S Number	First Name 🔻	Middle Names	Surname							
			Alison		Taylor	· · · ·						
10			Alison		Taylor							
F			Alison		Taylor							
			Alison		Taylor							
1	432	21092132	Alison		Taylor							





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

SystmOne Patient Appo Search Patient Appo Search	e GP: Locum Dr intments Report Task Discar	('Other' Community Health Service) at Rivermead Gate Medical Centre - Home ing Audit Setup Links Clinical Tools Workfow User System Hep G Save Record Details Today Next Acute Panic Map Mark Acute Panic Map	
Configure H	ome Screen		
Appts	Appts	New Online User Account	X
Q Search	Register	Demographics Changing patient demographics using this screen will change them for all SystmOne users and may update Spine. NIS ourber	
© Cagit	imms	Title First name Tommy Midde name(s) Surname Test Gender Maie Whaie Tommy Date of bith 24 Dec 1974 00:00 Approxim Home (No fixed abode) Temporary Contact Home phone Email address	
Patient se	arch	Addresses From Type Address No addresses recorded	Use For Searching Use For Correspondence
Search F1	1 help	Qk Cancel	





• Enter the care home address and select **OK**

)emographics-			
Changing patier SystmOne users	t demographics using this screen and may update Spine.	will change then	n for all
HS number			
itle	•		
irst name	Tommy	(
iddle name(s)		Address	
urname	Test	House name	Test
ender	Male	Road	Braithwaite Avenue
nown as		Locality	
ate of birth	24 Dec 1974 🔽 00:00 🔲 A	Town	Romford
		County	
ontact		Postcode	RM7 0DS Find Map
lome phone 02	203 4565896		
lobile phone			
mail address			<u>O</u> k <u>C</u> ancel

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)

X Register for Online Services	the second se	the second stand in the second stand		
Qk Cancel			Tommy Test 24 Dec 1974 (45 y) M Test, Braithwaite Avenue, Romford R Home (preferred): 020 3456 5896 C Medical Centre	M7 0DS Inline User, Rivermead Gate
Steps to Complete	Identity Verification			
Identity Verification	Minimum requirements: 1 decument/c) or usushing bu 1 staff member/c)			
Online Credentials	Page and the second secon			
Proxy Access				
	Passport Driving icence birth certificate bank statement offinty on mar	Differ Use Existing Proof		
	Conter proxy form completed	Drag Image Here		
		Telephone Numbers & Email		x
	Vouched for			
	Contact Details	Preferred contact method Ernall	Change Non-Preferred Commun	lication Method
	Record Contact Details	SMS Oconsent (Patient consents to rece	iving all SMS messages) Organisatio	n default is set to
	Email	Dissent (Patient dissents to received)	ing any SMS messages) assume co	nsent.
	Mohile	Mobile		×
		Unverified	Com	ments
	Unine Credentials	Preferred contact number		
	SystmOnline Username and Password	Home 020 3456 5896		×
	Username tommy53351	Verified	Com	ments
	Give username by O Printout O SMS O Email O Verbally	Preferred contact number		
	Give password by O Printout O SMS O Email O Verbally	Work		×
	Third Party (HSCIC Approved) Apps	Unverified	▼ Com	ments
	Account D 102605005	Preferred contact number		
	Give account ID by Printout O SMS @ Fmail O Ve	Alternate		×
	Give third party passphrase by Printout SMS Printout	Unverified	▼ Com	ments
		Preferred contact number		
	Printout Print all details on one page Print details on separation	Temporary		×
	Printer Settings	Unverified	▼ Com	ments
	Proxy Access	Preferred contact number		
	Allow this Online User to Access a Patient's Account	Email tommytest@nhs.net		
•		Verified		T
		Skype ID		×
		Email addresses are not valid S	Com	ments
		Click here to find out how to loca	te your Skype ID.	
		Q	k <u>C</u> ancel	

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

N.

Qk Cancel	Tommy Test 24 Dec 1974 Test Brathwark Avenue, f Home (referred), 220 345 Medical Cente	(45 y) M Romford RM7 0DS 56 5896 Online User, Riverm
Steps to Complete	Identity Verification	
Identity Verification Contact Details Online Credentials Proxy Access	Minimum requirements: 1 document(s) or vouching by 1 staff member(s)	
	Passport Patients	×
	X Of Name search min mouse Sgarch History This Agdress Not Found	Adyanced
	Vouc Include deducted patients I holude test patients Site All Sites	Columns & Settings
	Conta Date of birth Include patients only registered for remote booking Search on previous sumames	
	Reco NHS Number First Name Middle Names Surname, DOB A L.,, House Name House, Road Post	tcode Telephone
	Ucole Onlin SystmC Usernar Give est Give est	
	Account	
	Ove and Ove the Select Close	





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





Register for Online Services	the second					
<u>O</u> k <u>C</u> ancel						
-Steps to Complete						
Identity Verification	Contact Details					
Contact Details	Record Contact Details					
Services (Mrs Madge M Ash)	Email tommytest@nhs.net 🗸 Verified					
Proxy Access	Mobile					
	Online Credentials					
	SystmOnline Username and Password					
	Username tommy53351					
	Give username by O Printout O SMS O Email O Verbally					
	Give password by O Printout O SMS O Email Verbally					
	Third Party (HSCIC Approved) Apps					
	Account ID 192605995					
	Give account ID by					
	Give third party passphrase by Printout SMS I Email Verbally					
	Printout Print all details on one page Print details on separate pages					
	Printer Settings					
	Services (Mrs Madge M Ash)					
	Allow appointment booking I Allow medication requesting					
	Allow completing questionnaires*					
	Allow viewing summary record					
	Allow coded or full record Detailed coded record Full clinical record					
	Indicates that the service isn't currently offered here					
	Preferred contact method					
	Use alternative contact details					
	Basis for granting access					
	Patient consent (vritten) Patient lacks capacity - court of der					
	C ration concorn (match) C ration active capacity - power or attempty					

You can also add or remove other levels of access to that patients' record from this screen too.

tpp



🖉 🕿 🛄 🖻 👒 📕 📰 🧉			kat 🗽 📹 🚭	Practice	
Start Consultation Next Event Event	Attails Pathology Drawing At	uto-Consultation Settings		🛷 d 🗙	* 0
Clinical Administrative	Online Services				
Patient Details	Online Access Nessages	Audit Trail			
GP Registration Details	c_{r}				
Record Sharing	<u>Sysu</u>				
Care History	BOOK	KEQUEST KEGISTEK			
Address History	Account Status: Active				
✓ (Section Appointments, Visits & Tasks)	Patient ID verification: Vouch	ing (personal) by Luis North - known	ier millar		
SMS Messages (1)	Recorded during online service	ces registration			
Amendments (1)	Detailed Coded Record: Reco	ord fully reviewed.			
Contraception Claims	Full Clinical Record: Record f	ully reviewed.			
Maternity Claims	Reset password/Change use	arname Add or remove services Set full/coded clinical re	ecord start date(s)	Allow access to anothe	r patient's account Close account
ALAS/CCGs (2)	Show mixed applications (0)	Reset and party links view of issue new and party par	sopinase		
14 Schools	Show Previous Service Acce	198			
Misc. Flags (17)	The patient has online	e access with the following services enabled:			
🚟 Groups & Relationships (2)	Date started: 25 Oct 2019 1	3:55			Amend Service Access Remove Access
✓ 🔝 Hospital Numbers	Entered by. Heather Miliar				
Prescription History (7)	Consent Patient Consented	- Verbal			
🚯 A&E and Out of Hours Access	Appointment booking	 Available 			
🖶 Sharing Consent Overrides	Request medication	 Available 			
👫 Safeguarding Information	Questionnaires	✓ Available			
Benuty Vernication (1)	Summary record access	 Available 			
👩 Online Services	Detailed coded record access	 Available 			
Record Restrictions (10)	Full clinical record access	× Not granted			
	This online user has a	access to the accounts and services listed bel	ow:		
	Mr Chris Jones Date started: 25 Oct 2019 1 Entered by: Heather Millar	3:55		View Contact D	etalt Amend Service Access Remove Access
	Relationship Type: Partner Consent: Patient Consented	I - Verbal			
	Appointment booking	✓ Available			

• In the screen that appears next, select Don't inform

ccount ID	192695995				
Give account ID by	Printout	SMS	Email	Verbally	
Give third party passp <u>prase by</u>	O Printout	SMS	Email	O Verbally	
Question	ו	_			×
Printer Settings	Tomn Ash.	ny Test wil	l now be a	able to access th	ne online account of Mrs Madge M
Services (Mrs	Would	l you like t ct method	o inform N (SMS or e	Irs Madge M Ast mail only)?	n via their preferred and verified
Allow completing q Allow viewing sum			Infor	m <u>D</u> on't Inf	orm
Allow coded or full permit				FILL PROPERTY	10.05

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.

tpp





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.

Care -	(a)	100
Warning		
⚠	You have retrieved an online user. This record should not be used for recording clinical data.	
L	EM .	

• When entering the record of the proxy (online user) the following question may display. If it does, select **No**

Question		
?	This SystmOne patient record hasn't been matched to a corresponding record on the PDS.	
	Until this is done, none of the Spine services can be used for this patient, such as Choose and Book, EPS or SCR. Do you want to match to a PDS record?	
	Yes 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.