

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

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)				

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 * Given name * Gender

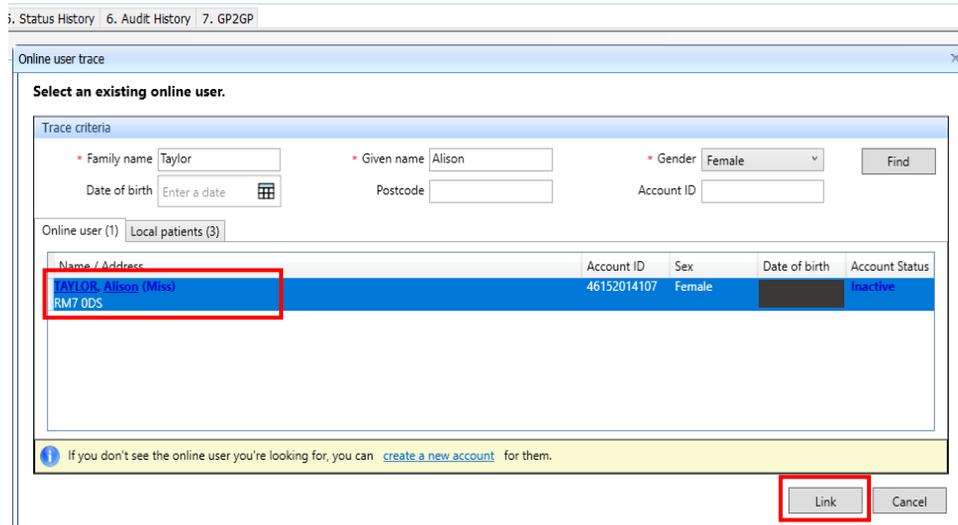
Date of birth Enter a date Postcode Account ID

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

i If you don't see the online user you're looking for, you can **create a new account** for them.

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 Find

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

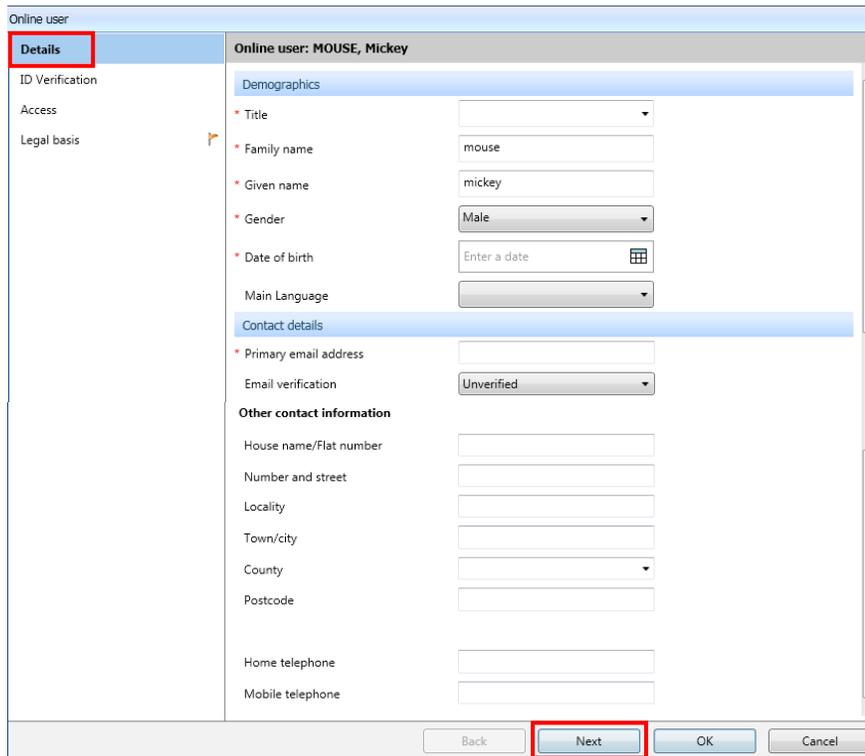
Online user (1) Local patients (3)

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

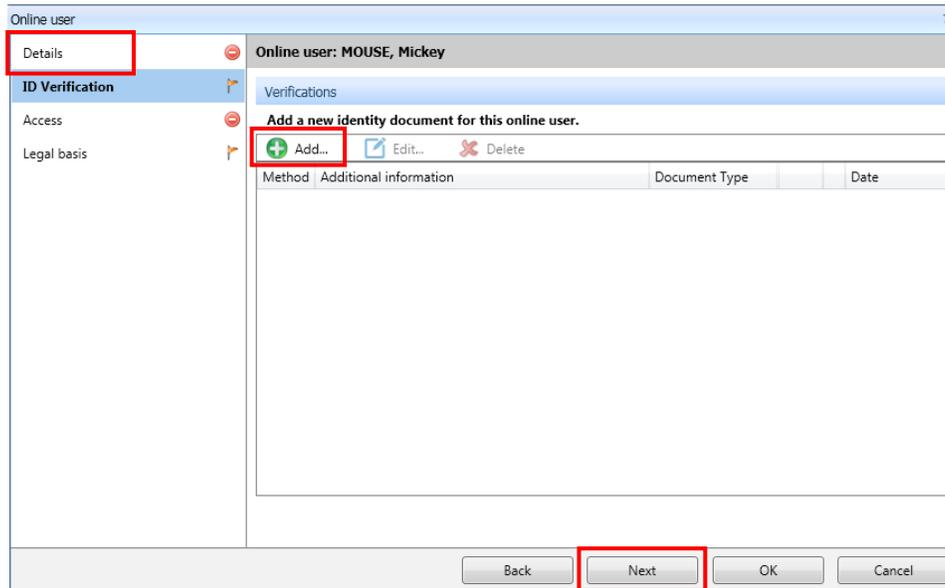
Primary email address: Email verification: Unverified

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

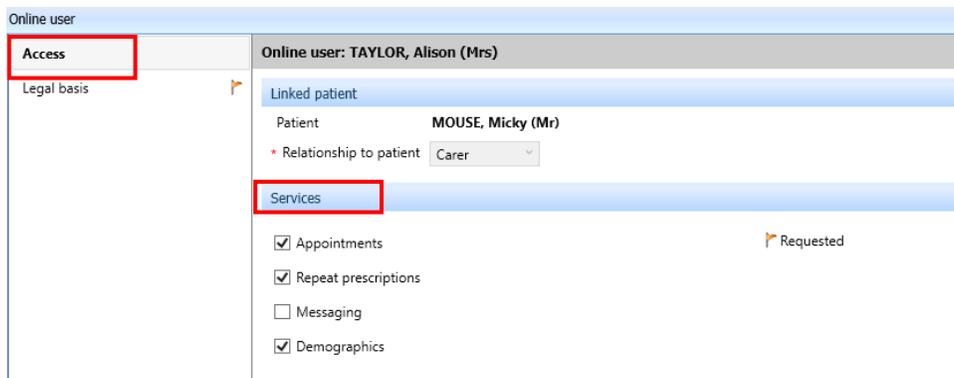
Add a new identity document for this online user.

+ 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

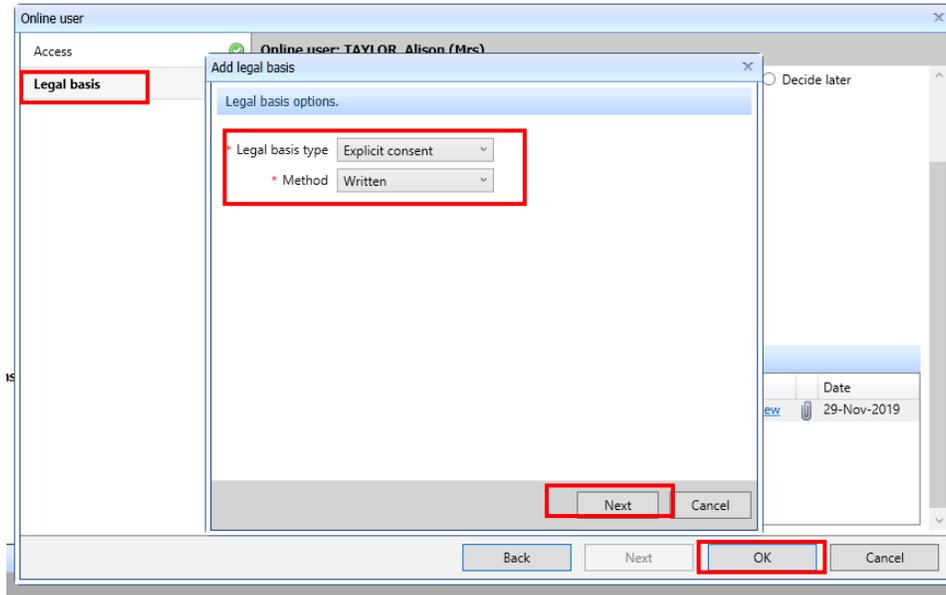
Update legal basis... [What is legal basis?](#)

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

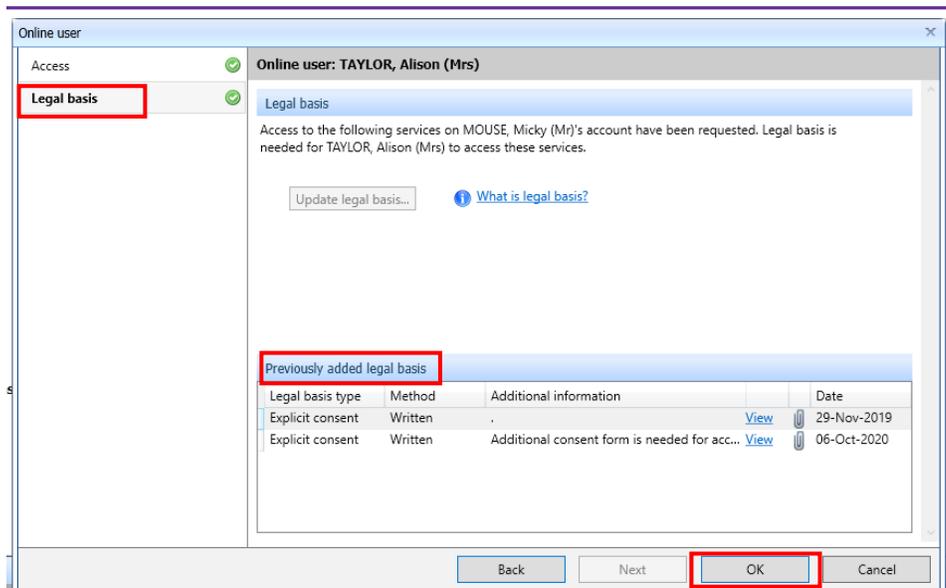
Cancel

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

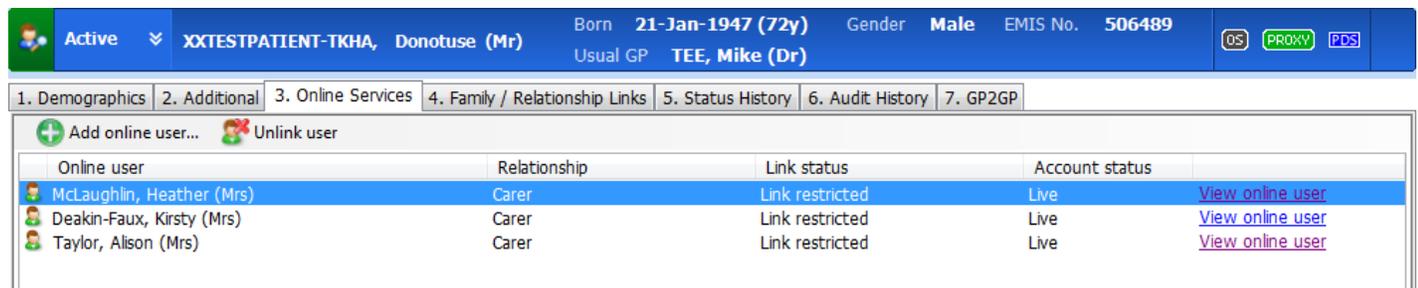
2. Provide the following online services account details when prompted:

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 list of online users. The user 'Taylor, Alison (Mrs)' is listed with a 'Carer' relationship, 'Link restricted' status, and 'Live' account status. 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)

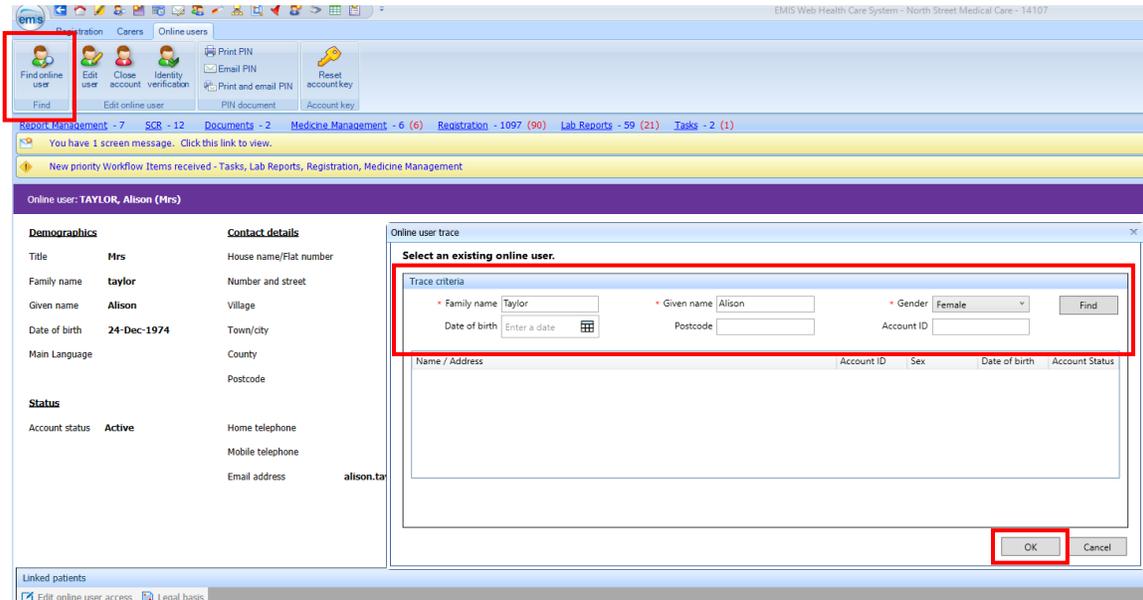
Name / Address	Account ID	Sex	Date of birth	Account Status
TAYLOR, Alison (Miss) RM7 0DS	46152014107	Female	[REDACTED]	Inactive

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

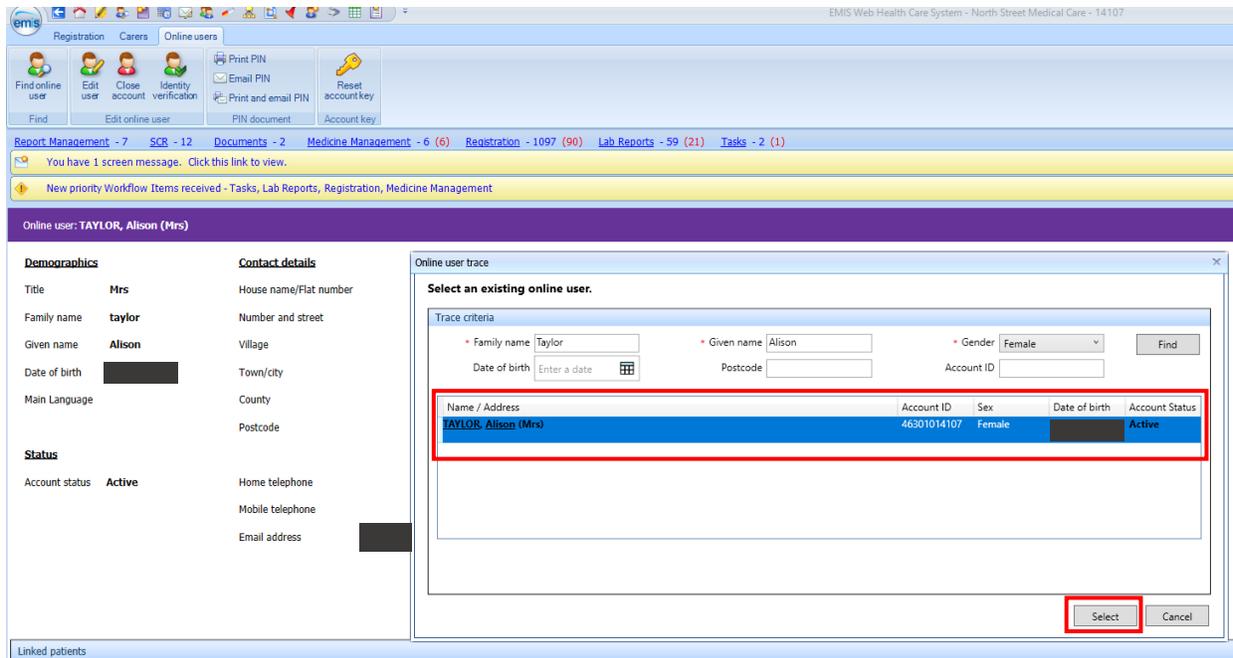
Link
Cancel

Search for online user - removing an authorised care staff proxy

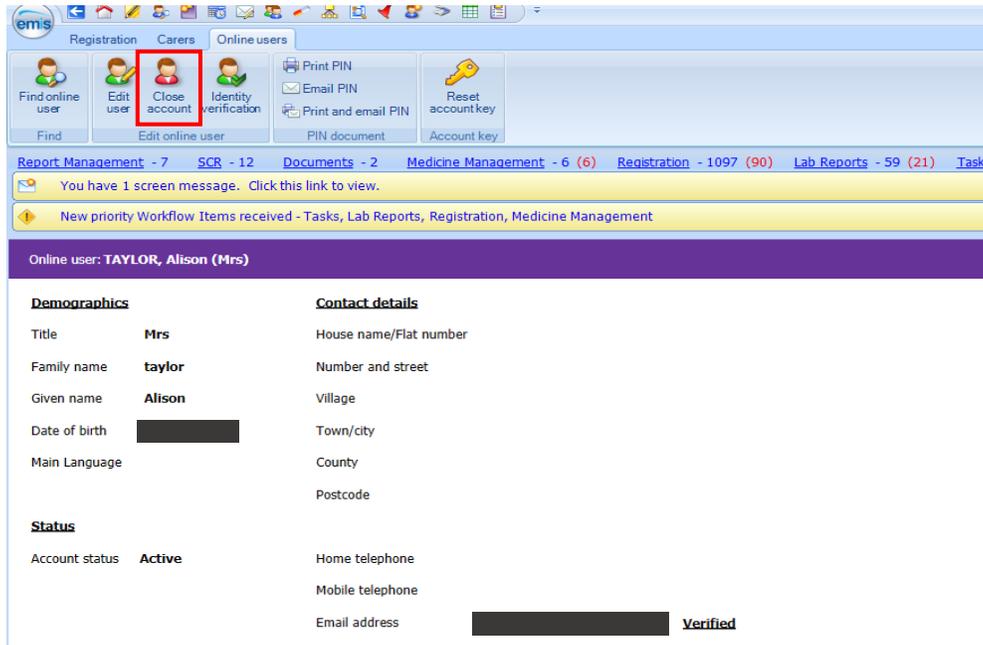
When authorised care home staff leave or to update access, search for the user.



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



- Click on **Close account**



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

