A Guide to Implementing EMIS Proxy Access for Care Homes

Contents

Acknowledgements

Information and resources have been adapted from NHS England for local use.

Introduction

This guide is to support GP practices and Care Homes set up EMIS proxy access to enable and manage online ordering of repeat medication for care home residents.

Proxy access was developed to allow someone other than the patient to access and manage parts of their GP online services account. Typically, proxy access is used by parents of young children and carers of adults. Frequently, it is used by family members or close friends, but increasingly for professional carers. Care Home staff are provided with their own accounts rather than using the patients login details.

Why proxy access?

Proxy access for care staff to a resident's online account is a simple option for enabling them to order medication.

This will allow authorised care staff setup by the GP practice;

- To access patient/resident record(s) in the associated GP system via an online website.
- Select which medication needs re-ordering and place a request.
- Be able to make a note: for example, if a medication not in sync with the 28 day cycle or medication review by GP overdue etc.
- Audit trail of medication ordered, issued and dispensed.

Benefits – Feedback summary from pilot sites

- Reduction in risks and issues associated with ordering, issuing, collecting and dispensing of repeat medication.
- Reduction in errors and queries (e.g., missing medication, what has been ordered/collected from pharmacy). Improved clinical safety.
- Improved access as care setting staff can order at any time of the day or night. Improved audit trail and easy to access.
- Improved data security and clinical safety as having NHSmail (or other secure email) for example allows secure communication with the practice and other health care professionals.
- Improved turnaround time for queries due to audit trail and secure email communications therefore improving patient care.
- Improved data security and time saving as care setting staff access proxy user via their own username and password.

- Improved stakeholders communications and working relationships

Before setting up EMIS Proxy Access

Care homes must ensure they meet the standards of the current Data Security and Protection Toolkit (DSPT) prior to the implementation of EMIS Proxy Access.

The Design and Learning Centre offer **FREE support** to help you complete the Data Security and Protection Toolkit (DSPT).

As part of the Better Security, Better Care national programme, Kent County Council (KCC) in partnership with Kent Integrated Care Alliance (KICA) are supporting social care providers across Kent and Medway to register and complete the DSPT.

The DSPT is a free online self-assessment of your organisation's data and cyber security. It is recognised as the official tool to evaluate your compliance with legal requirements, Data Security Standards and good practice. It is also required in order to access key services such as NHSmail and shared care records as well as NHS digital systems, including remote monitoring and medication ordering directly with the GP.

The DSPT is increasingly what local authorities, Integrated Care Boards (ICB) and the Care Quality Commission expects to see.

Watch their introductory webinar online

https://www.youtube.com/watch?app=desktop&v=oRLH9bN16dQ&feature=youtu.be

Sign up to small virtual workshops or 1:1 sessions on their website – free support to help you register and work through the toolkit.

For any queries, support or to find out more, please get in touch: dspt@kent.gov.uk

Training sessions

Free training can be found at NHS England » How to set up care home proxy access

NHS England » Getting a secure email account: A guide for social care organisations

We encourage all members of staff involved in the ordering process attend a training session.
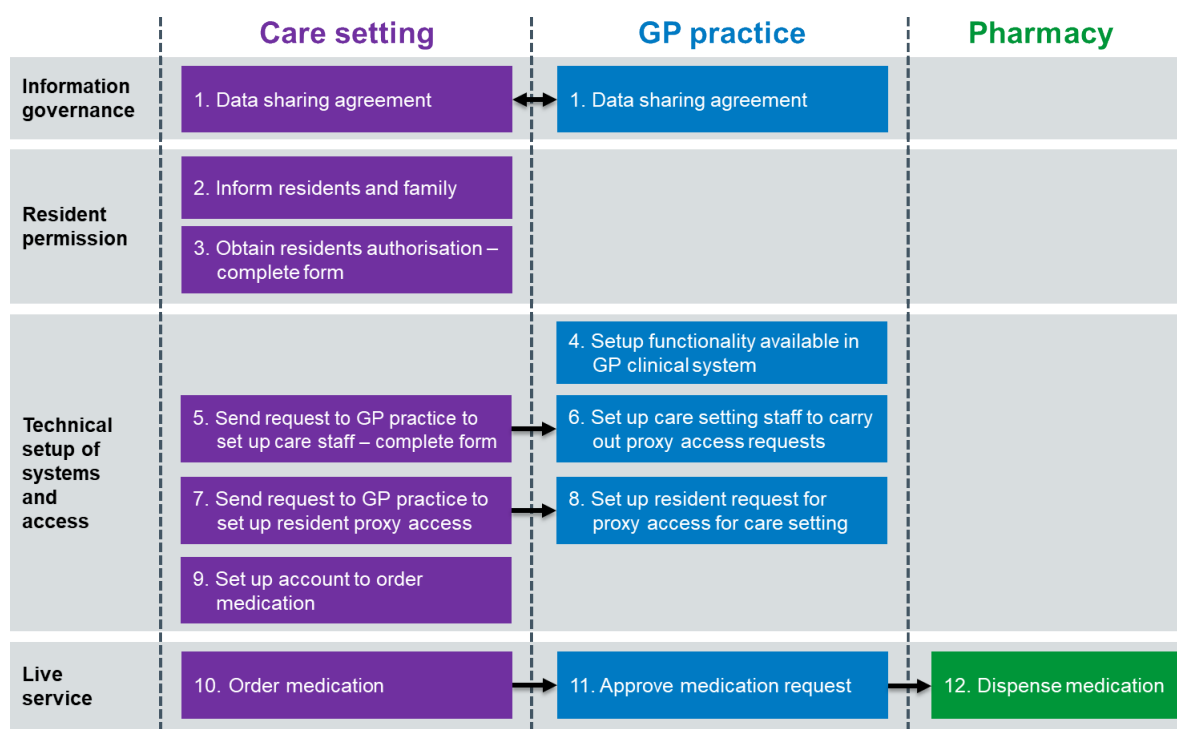
Initial meeting

An initial meeting should be set up by either the care home or GP practice to discuss the plan for EMIS proxy access implementation and the roles and responsibilities of all parties. This should include where possible:

- GP or care home lead within the GP practice/PCN
- GP Practice Manager
- PCN or practice based Pharmacist and/or pharmacy Technician
- Care Home manager
- Care home staff involved in ordering medications for residents
- Community pharmacist from supply community pharmacy

Agenda for initial meeting

- **Roles and responsibilities**

Below is a reminder of roles and responsibilities of each party;

	Care setting	GP practice	Pharmacy
Information governance	1. Data sharing agreement	1. Data sharing agreement	
Resident permission	2. Inform residents and family 3. Obtain residents authorisation – complete form		
Technical setup of systems and access	5. Send request to GP practice to set up care staff – complete form 7. Send request to GP practice to set up resident proxy access 9. Set up account to order medication	4. Setup functionality available in GP clinical system 6. Set up care setting staff to carry out proxy access requests 8. Set up resident request for proxy access for care setting	
Live service	10. Order medication	11. Approve medication request	12. Dispense medication

- **Nominate a lead -** As part of the initial meeting it is recommended that the care home and GP practice nominate a lead for implementing proxy access. This enables a point of contact for all communications and updates. Use checklist on page 9 to document details.
- **Communication plan -** Communication pathways should also be agreed at the initial meeting e.g. **secured** email address and phone numbers to use for all correspondence. Use checklist on page 9 to document details.
- **Ordering and processing dates within cycle -** We advise that this is reconfirmed and/or altered if necessary to ensure prescriptions are processed and medications received in a timely manner to prevent any potential missed doses. This must also be agreed with the community pharmacy.
- **Level 1 medication review –** Discuss who will be responsible for completing these and when by.
- **Timescales -**. We advise that the process should take no more than 3 months to set up and implement. During this time the ICB team will offer support to get the process up and running.

Information about EMIS proxy access should be shared with the wider team that may not attend the initial meeting but should be aware of the changes. Appendix 1 is a leaflet of information for staff about EMIS proxy access.

Getting started

Once you are DSPT compliant, had an initial meeting and nominated lead you are now ready to start setting up EMIS Proxy access within your care home.

Step 1. GP practice and care home data sharing agreement

The care home lead and GP practice lead must create a high-level data sharing agreement that sets out-:

- What information is going to be shared between care home, GP practice and pharmacy where relevant, and why.
- The rules around security, accuracy, use and deletion of data.

The NHS Digital website gives more information, including a short video, about data sharing agreements. A data sharing agreement template can be found in appendix 2.

All care home staff will also need to sign an agreement based on these principles (see Step 5 below)

Step 2. Care home tells residents about changes in how repeat medication will be ordered

The Care home lead must tell all residents about the new way of ordering medication and explain that this means care home staff will use proxy access to do this.

A letter must be given to all residents or sent to their representatives, explaining the process, benefits and associated risks . See appendix 3 and 4 for an information leaflet and an example letter to residents.

All residents should be offered a one-to-one discussion with the care home manager/lead before agreeing to the new way of ordering their medication.

Step 3. Care home gets each resident's permission

The Care home lead must get signed permission from each resident/patient (or their representative) to show that they understand the new ordering process and are willing to give care home staff proxy access to their GP record. See appendix 5 for a template consent form.
Each resident or their representative will need to sign a personalised form and be given a copy of it. A single form listing all residents in a home is not acceptable. This step could take up to 2–3 weeks to complete.

The GP makes the final decision. If they have any concerns, they will not grant proxy access and will discuss this with the resident/patient.

Step 4. GP practice sets up proxy access in their clinical system (if necessary)

Most GP practices already have GP online services set up with proxy access users . Setting up care home staff has one difference.

- **Care home staff must be set up WITHOUT an NHS number**, this only needs to be done once. Refer to appendix 6 for a GP system users guides for EMIS on how to do this.

Step 5. Care home sends request to GP practice to set up staff

Before proxy access can be given, each care home member of staff responsible for ordering medication must be set up on the GP system.

The care home manager/lead and each member of staff must complete a form request proxy access rights. See appendix 7 for an example form. This form can also be used to remove access from a member of staff.
The Care home lead must send completed forms to the GP practice, keeping a copy for the care home's records.

Step 6. GP practice sets up access for care home staff

The GP practice lead should:

- create separate folders on a secure shared drive for each care home
- save all forms from the care home (both for requesting and removing access)
- set up a proxy access login for each care home member of staff

Step 7. Care home sends residents' consent forms to the GP practice

The Care home lead sends signed copies of the residents' authorisation forms to the GP practice lead or their generic inbox as agreed locally. A copy should be made by the care home and filed in the residents care plan.

Step 8. GP practice sets up proxy access for each resident

The GP practice lead should:

- scan/file the authorisation form into the resident's patient record
- create a proxy access account for approved care home staff members (**repeat medication ordering only)**,. sending their set up and log-in details to the care home's secure email account.

Step 9. Care home staff verify their own accounts

Once the GP practice has given proxy access, each care home staff member must verify their account before starting to order medication for a resident.

A user guide has been produced to help you get started. See appendix 8.

Step 10. Order medication online

As user guides is available to explain how to start ordering. See appendix 8.

Notes can be added to the medication request for example 'need 7 extra tablets to align with cycle' or 'Only 1 insulin pen required this month'. **Notes are not to be used for urgent requests.**

Step 11. GP practice approves or rejects medication request

When medication is ordered by the care home (the monthly date must be agreed with the practice and the community pharmacy informed under the medication cycle planner already in place) a member of the GP practice team will process these online requests in the same way as all other repeat prescription requests.

Once approved by a GP, the practice will follow the agreed process for dispensing and delivering medication.

EMIS have produced standard operating procedure (SOP) guides for GP practices, see appendix 9.

Step 12. Dispense medication

The authorised prescription will be:

- Electronically sent to the community pharmacy via the electronic prescription system (EPS), or
  collected from the GP practice by the community pharmacy or care home.

- Once dispensed the medicine will be ready for collection from the pharmacy or may be delivered to the care home by local agreements.

Level 1 medication review guidance

It is recommended that a level 1 medication review is carried out for all residents prior to the initiation of EMIS proxy access. This should be completed by a pharmacist, pharmacy technician or GP.

- ✓ Align every resident to a 28 day cycle
- ✓ Ensure 'days supply' section is correct (usually 28 days)
- ✓ All quantities aligned to supply 28 days' worth of treatment at a time. Where appropriate
- ✓ Ensure MAR charts and PMR correspond. Anything that is on MAR chart that is no longer a current medication **must** be communicated to the community pharmacy to be removed for the next cycle onwards
- ✓ Regularly prescribed acute prescriptions are changed to repeat where appropriate to allow Care Home to order via proxy access
- ✓ PRN medications are reviewed and if still required put under 'variable repeat'. This could be an opportunity to move appropriate residents to homely remedies if used within the home.

What happens when

Now you have EMIS proxy access set up within the home what happens when;

A resident no longer requires proxy access via the care home
If a resident no longer requires proxy access for the ordering of their medications then the care home must inform the GP practice. The GP practice should then remove this function from the resident's EMIS account.

A new resident moves into the home
All new residents must be informed that the home uses online access to order medications for residents within the care home. The resident information leaflet (appendix 3) can support this as well as a discussion with the resident about the ordering system. A consent form (appendix 5) should ideally be completed on admission to prevent a delay in ordering medications via proxy access should the resident consent.

A staff member leaves or a new member of staff requires proxy access
It is the care home manager's responsibility to ensure that access is removed from staff who have left the home by completing and returning the removal request form found in (appendix 7) to the GP practice. The GP practice must then remove this access from their EMIS account.

If a new member of staff requires access then a staff request form (appendix 7) should be completed and sent to the GP practice.
A copy of these forms should be kept within the home for records.

Top tips

✓ **Communication**

- ✓ Communicate the change to ALL members of staff so that everyone is informed of the change
- ✓ Regularly communicate with nominated leads to be up to date with the set up process
- ✓ Communicate with community pharmacy, GP practice and Care home to agree responsibilities and build good working relationships

✓ **Use online training**

- ✓ Use the FREE online training available for all staff that require knowledge of the system
- ✓ Train more than 1 member of staff to ensure business continuity of the service

✓ **Don't be afraid to ask**

- ✓ Contact the integrated care team at Kent and Medway ICB if you require any support

✓ **Use the checklist provided to track progress** (page 9)

✓ **Use the guides provided**

✓ **Complete level 1 medication review**

✓ **Opportunity to review and improve ordering cycle**

- ✓ Review the process to ensure that the policy/procedure is reflected in practice
- ✓ 2 members of staff are trained and competent to order medications
- ✓ Allocated and protected time is given for medications to be ordered
- ✓ Stock levels are checked prior to ordering and only medications required are requested
- ✓ When required medications are reviewed regularly to ensure they remain appropriate and waste is avoided

Checklist Recommended that both the nominated leads print and complete. GP

Practice use one per care home. Name of Care Home…………………..

Activity	Responsibility of (Insert names where appropriate)	Date to be completed (Agreed during initial meeting)	Date completed
Data Security and Protection Toolkit – standards met	Care Home		
Initial meeting	All		
Nominated leads appointed (Agreed in initial meeting)	Name of GP Practice Lead………………………………………………………… Name of Care Home Lead……………………………………………………………		
Contact email and/or phone number to be used (Agreed in initial meeting)	GP practice contact details………………………………………………… ……….. Care Home contact details………………………………………………… …………………………………………………………		
Dates for medication prescriptions to be processed (Agreed in initial meeting)	Care home to request prescriptions week…………….. GP practice to issue prescriptions week……………….. Pharmacy dispense prescriptions week…..…...............		
All staff informed of change	All		
Data sharing agreement signed by GP and care home	All		
Level one medication review completed for residents	GP practice		
Residents informed of change and provided with information leaflet	Care Home		
Consent from residents received	Care Home		
Care home completes staff request forms	Care Home		
Care home sends completed staff request forms to GP practice	Care Home		
Care home sends completed consent forms to GP practice	Care Home		
GP practice set up staff EMIS proxy accounts	GP Practice		
GP practice sets up proxy access for each resident	GP Practice		
Care home staff verify account	Care Home		
First cycle of medications ordered using new system	Care Home		
GP practice approve/reject prescriptions	GP Practice		

Appendix 1 - Online ordering of repeat prescriptions by a care home: Information for staff

Benefit of online GP services

Using online health services has become more and more popular over the last few years. The computer systems in GP surgeries make it easy for patients to order repeat prescriptions and book or cancel appointments quickly, at any time of the day or night. This is more convenient for patients, it reduces the need to travel to the GP surgery, and it saves the practice lots of time. GPs get fewer phone calls and pieces of paper to act on. This means they can now do things faster, and generally help make things better for patients.

Moving from paper to online ordering of repeat prescriptions

Care home staff can be set up by a resident's GP practice as a 'proxy' to order repeat prescriptions online, instead of on paper.

Anyone with proxy access must go into the part of the GP clinical record that deals with repeat medication. It is important to make sure the resident understands and is comfortable with this.

Residents must be given information about the new way of ordering prescriptions and have the chance to ask questions or talk through concerns before agreeing to the change.

> The GP record is personal to each resident/patient. Residents must be informed about the new way of working and be given a chance to talk through any concerns and ask questions with a member of staff.
>
> Residents can decide they do not want care home staff to have proxy access. They can also ask their GP to remove proxy access at any time.

Your manager has agreed with your local GP practice and pharmacy to use proxy access and work together in the best interests of your residents.

What you will need to do

You will need to sign a form to say that:

- your information governance training is up to date
- you agree to keep personal information safe, secure, and confidential
- you agree to take responsibility and accountability for the information you see and use on behalf of your residents

Your signed form is sent to the GP practice which will set up proxy access for you and other staff. You will be sent login information by the practice and told how to activate your account. This must be done before you can order any medication for your residents.

Is it secure?

The care home has an agreement with the GP that means you must keep any information you see in a resident's GP record confidential and secure. You also need to keep your information governance training up to date.

GP computer systems also have built in security that keeps track of everyone who opens a record, what they did, and when. There are robust, electronic and audit trail procedures in place to handle anyone who breaches security or confidentiality..

Can residents object?

Yes. The information in the GP record belongs to your resident and they can decide who can access it. Each resident decides if they want you to have access or not. Residents can object at any time and their wishes must be respected. Access by the care home staff can be removed at any time by your GP practice.

Appendix 2 - Data sharing agreement

This data sharing agreement is between

Name of GP practice	
Name of care home	

Introduction

This Data Sharing Agreement facilitates the lawful, safe and secure sharing of information between the named GP practice and the named care home on behalf of all residents registered at the home, according to the General Data Protection Regulation (GDPR) 2018 and the Data Protection Act 2018.

This use of data is in connection of provision of direct care.

For the purposes of this Agreement **<insert GP practice name>** shall own the data and will be Data Controller(s). The Data Controller is the organisation (or person) that 'determines the purposes and means of the processor of personal [and special category] data, and has overall control of how, why, what, when and where the data the data is processed and the duration of the processing'

Purpose of the agreement

Your agreement is necessary to:

- deliver preventative medicine

- conduct medical diagnosis

- deliver health and social care or treatment

- identify the "at risk" population who may be at risk of an unplanned admission

- improve the life circumstances and outcomes of residents in care settings people and their family members

- reduce the number of older people whose life circumstances and experiences make them at risk of harm

- improve the life circumstances and outcomes for older people, older people living with dementia, and their family members

- reduce the number of older people whose life circumstances and experiences make them at risk of harm

Lawful basis for sharing

The data disclosed will be relevant to the stated purpose(s) of this agreement and the minimum necessary to achieve the purpose(s).

The sharing of data is necessary for the exercise of statutory functions conferred on the parties as follows:

Party	Statutory function
GP Practices National Health Services Act 2006 – Part 1	Promotion and provision of the Health Service in England.
GP Practices Health and Social Care Act 2012 – Sections 1 to 8	Duty to promote comprehensive health services, improve quality of services, reduce inequalities, promote autonomy, conduct research, deliver education and training, observance of the NHS Constitution and report and review performance of providers.

GDPR conditions

This agreement and process of data relies on the following basis:

- **Article 6 1E**
  The lawful basis we rely on to process your personal data is article 6(1)(e) of the GDPR, which allows us to process personal data when this is necessary to perform our duty of care.
- **Article 9 Paragraph 2H**
  To lawfully process special category data, you must identify both a lawful basis under Article 6 of the GDPR and a separate condition for processing under Article 9. This covers the provision of health or social care or treatment.

Information to be Shared

The personal and special category data to be shared may include name, address, date of birth, NHS number, and a full range of other confidential and sensitive information available to access in the GP record.

When consent to proxy access is being obtained, it is important to make clear the purpose or purposes for which it will be used. If the purpose or purposes change, a new consent should be obtained.

Information Security

The information will be transferred securely by way of secure NHSmail, or an accredited alternative form of secure electronic transfer commonly email. There must be controls in place to ensure that only the intended recipient can view it, either through role-based access controls or encryption technology. The recipient will mark the information as confidential and restricted and keep it securely.

Personal data will **not** be transferred to a country or territory outside the European Economic Area unless that country or territory ensures an adequate level of protection for the rights and freedoms of data subjects in relation to the processing of personal data, which is consistent with the UK's data protection legislation.

Information accuracy, use, retention, and deletion

The accuracy of the data shared with the care home will be the responsibility of the GP practice. The GP practice will, therefore, ensure that the data is accurate and up to date before the data is disclosed. If the GP practice becomes aware of any inaccuracies in data it has shared, the GP practice should inform the other party(ies) immediately and the data corrected or recalled.

The care home must not share the information with any third party without the written consent of the GP practice and subject to entering into a separate Data Sharing Agreement, the terms of which must be approved by the GP practice.

Signatories to Agreement and Date

Name of care home *(block capitals)*	
Name of care home manager/responsible person	
Signature of care home manager/responsible person	
Date	

Name of GP practice manager/responsible person	
Signature of GP practice manager/responsible person	
Date	

Appendix 3 - Online ordering of repeat prescriptions by a care home: information for residents

Benefits of GP online services

Using online health services has become more and more popular over the last few years. The computer systems in GP surgeries make it easy for patients to order repeat prescriptions and book or cancel appointments quickly, at any time of the day or night. This is more convenient for patients, it reduces the need to travel to the GP surgery, and it saves the practice staff a lot of time. Practice staff get fewer phone calls and pieces of paper to process. This means improved turnaround time for queries and improves patient care.

Letting my care home request repeat prescriptions for me

Your care home would like to use GP online services to order your repeat prescriptions for you, instead of on paper which is how it is done now. Before your care home can do this, they need you to agree to this by signing a form to say you are happy for them to see part of your GP record. They will sign a form promising to keep your information safe, secure, and confidential.

> Your GP record is personal to you. You can decide not to let anyone have access to it, if this is what you want.
>
> Your care home manager will be happy to talk everything through with you and answer any questions you might have.

Is it safe and secure?

You can decide what the care home can see and do in your online GP record. This request is to allow your care home to see only the part which lists the medication you get regularly, and to order repeats for you.

The care home and its staff have an agreement with your GP that means they must keep any information they see about you online confidential and secure. Each member of staff who has access will have been trained. They also must sign a form to say they will keep your information confidential and secure.

GP computer systems also have built in security. This keeps track of everyone who opens your record and what they do, and when they do it. There are procedures in place to handle anything or anyone who breaches security or your confidentiality.

Can I refuse to let the care home access my GP record?

Yes. The information in your GP record belongs to you and you can decide who can access it. You can object at any time and your wishes must be respected. To do this you, your representative or your next of kin can

- Ask the care home to stop using GP online services to order your repeat medicines
- Contact your GP and ask them to stop the care home and its staff from accessing your record.

Can I use GP online services too?

Yes, you can. You can also agree to your next of kin or another representative to have online access if you want them to.

All requests for access must be made to your GP practice who will give you the information you need and a form to complete. There will be checks to make sure anyone applying for access to your record has a right to do so, and that they are who they say they are.

Appendix 4

<Insert date>

Dear **<insert resident's name>**

Ordering your repeat prescriptions

I am writing to let you know that we plan to start using a new, computer-based, way of ordering repeat prescriptions for all our residents from **<Insert date>**. A short leaflet is attached explain how this will work.

We will need you to sign the enclosed form, this gives us permission to ask your GP to set this up on their computer system.

Please read the leaflet and let me or any of the staff know if you have any concerns or questions.

Yours sincerely

<insert name>

Care Home Manager

<Insert phone number and email address>

Appendix 5

Permission to allow <Insert care home name> to order my repeat medication using GP online services proxy access

Resident's name		Resident's date of birth	
Resident's address	<Insert care home address>	Postcode	<Insert care home postcode>
Resident's/care home phone number			
Resident's email address if applicable			

Tick one of the options below

I am the resident	☐
I.. am the resident's next of kin or person with legal power of attorney and agree to the online ordering of repeat medication by the care home, in the best interests of the resident.	☐
I.. am the manager of the resident's care home and agree to the online ordering of repeat medication by staff in the absence of next of kin, believing this to be in the best interests of the resident.	☐

Please read the following and tick each statement you agree with

I reserve the right to change my mind at any time	☐
I understand the risks of allowing someone else to have access to my health record	☐
I have read and understand the information leaflet provided by the care home	☐
Signature		**Date**	

For the care home

I confirm I have verified the identity of this resident in accordance with our organisation's ID verification protocol	
Signature		**Date**	

Appendix 6 - EMIS Web user guide | GP practices to set up a new proxy user

Before you start

- Have an up to date resident list/report available

- Before starting the setup, scan and save all staff and resident authorisation forms

Setting up a new proxy account

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**

Step 2 | staff already registered at the GP practice

> 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, making sure that they are not included in population reporting or generate a 'price per patient' payment to the practice.

If the proxy user is a registered patient at the practice **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

- You will need to select this account, without an NHS number, to link to care home residents' accounts.

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

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

- In the **Access** screen, complete the **Relationship to patient** field, and untick services not needed by the proxy user. Click **Next.**

- In the Legal basis screen, untick Allow access for Appointments and Core summary record. Click Legal basis and Legal basis type.

- 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 **Next**.

- Click **Next**, click **Save.**

- If **Legal basis** appears again, click **Not now**, then **OK.**

Step 3 | Issue PIN document

Issue PIN documents by selecting **Email PIN** via 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 onlineservices

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	

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 ordering medication by proxy once they have activated their account. This can be viewed under **Account status** in the online user screen.

Step 5 | repeat for each patient

Repeat the above steps for each patient the proxy 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.

Removing a care home worker as a proxy

When a member of care home staff is leaving, search for the online user.
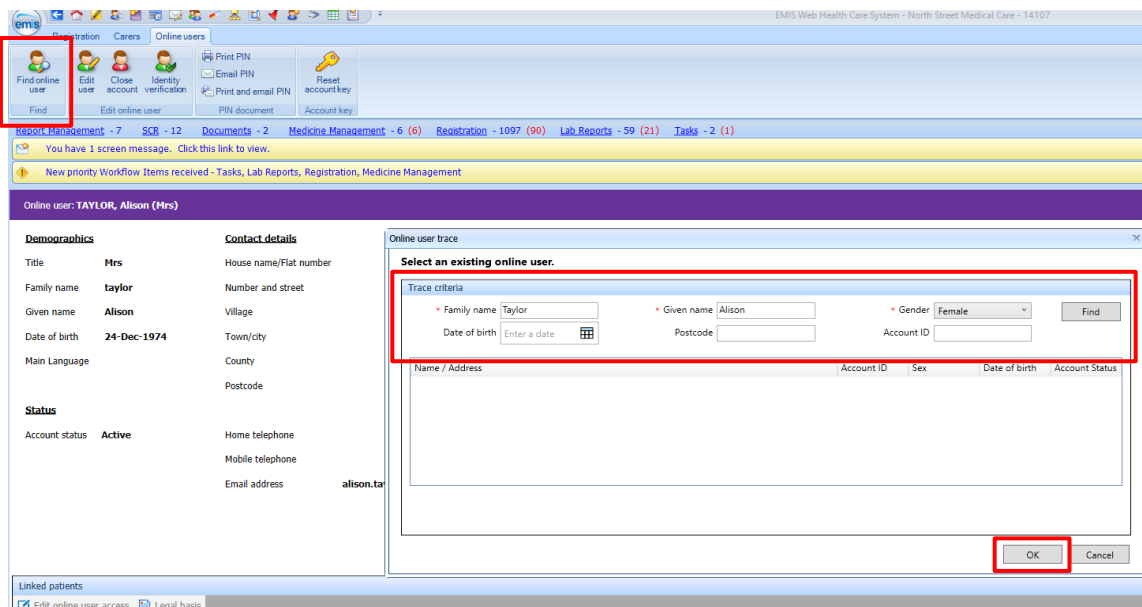
- Click on User's name and Select
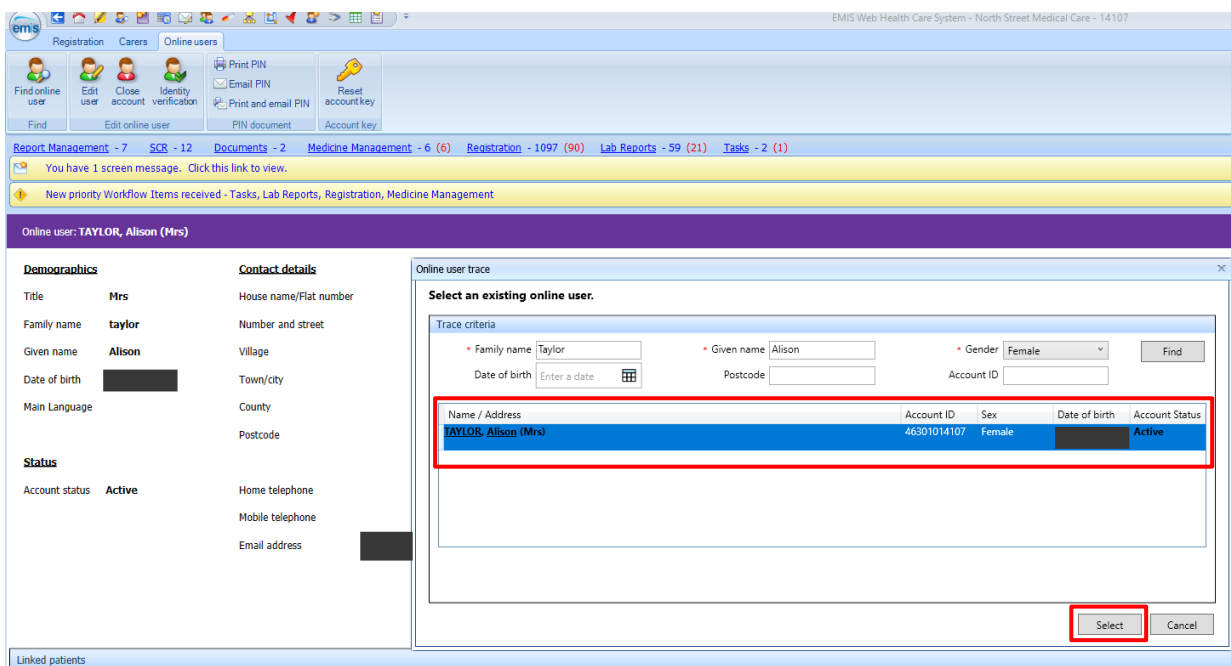
- Click on Close account
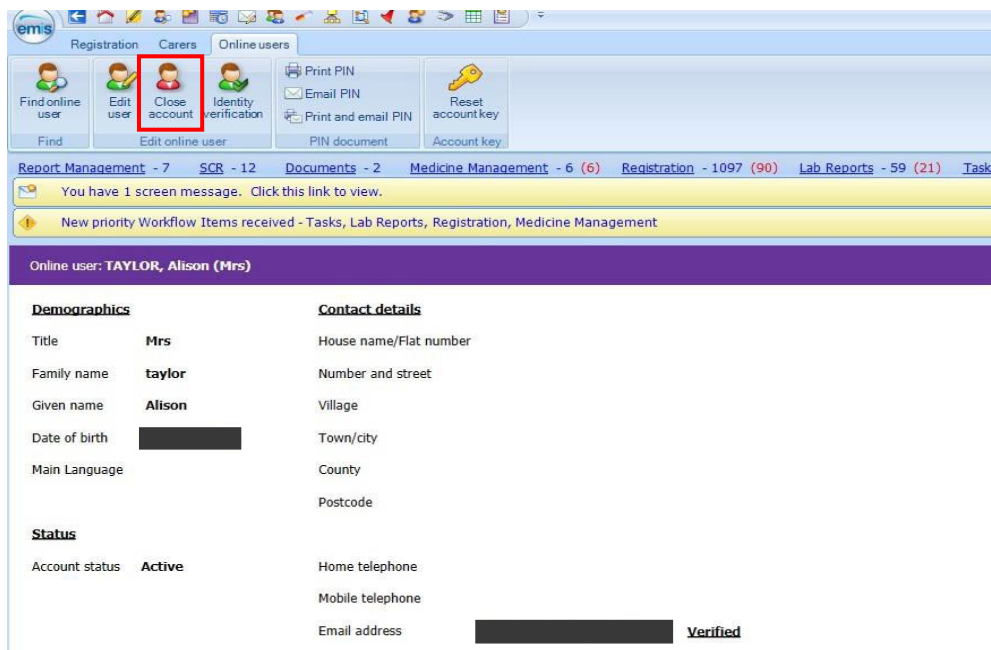
- Select a reason for closing this account, as appropriate.
- Click **Close account**
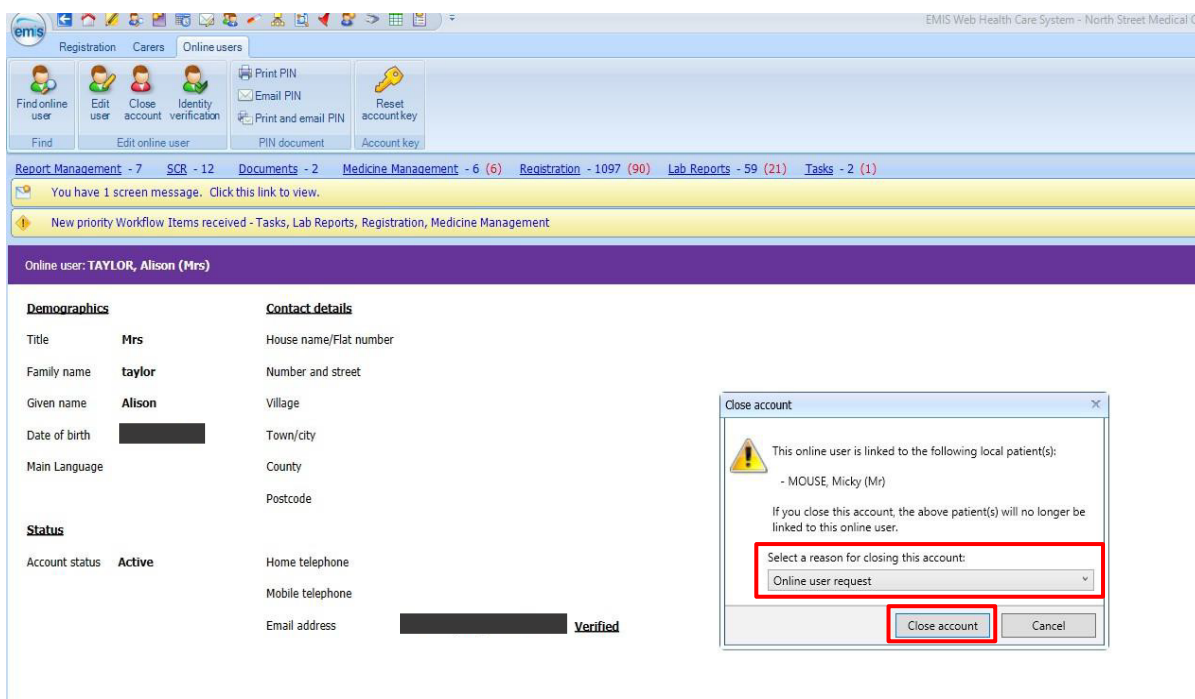
Appendix 7 - Application to add/remove care home staff proxy access for online ordering of repeat medication

Section 1 | add or remove access

Add access ☐   Remove access ☐

Section 2 | to be completed by care home project lead

Staff's name		Staff's date of birth	
Care home address	<Insert care home address>	Postcode	<Insert care home postcode>
Care home staff phone number			
Care home staff secure individual business email address			

ID verification	I confirm I have verified the identity of the named care home worker	☐
IG training	I can confirm that this staff member has completed the required level of information governance training as identified in the Data Sharing Agreement	☐
Add proxy access	I can confirm that this member of staff is currently employed with our care home and proxy access to all residents' records should be approved	☐
Remove proxy access	I can confirm that this member of staff has now left our care home and proxy access to all residents' records should be removed	☐

Section 3 | Terms of Agreement to be completed by staff member

I understand and agree with each statement below (Please tick)

I have read and understood the information leaflet provided by the practice about online access and will treat the patient's information as confidential	☐
I will be responsible for the security of any of the information that I see or download	☐
I will contact the GP practice as soon as possible if I suspect that the account has been accessed without my agreement	☐
If I see information in the record that is not about the patient or is inaccurate, I will contact the practice as soon as possible. I will treat this information as strictly confidential.	☐

Staff's name	
Signature	
Date	

Section 4 | To be completed by GP practice

Action	Completed by	Date
Staff member online user status and proxy access granted		
Log in details emailed to care home		
Staff member online user status and proxy access removed		

Appendix 8 - EMIS Patient Access user guide for care home staff | ordering repeat medication online for care home residents

This only needs to be done once. If you already have an individual patient access account on behalf of the home set up at a different EMIS practice you do not need another one.

If you order your own medication online, you **must not** use your personal account to order residents medication. You will need to set up a separate Patient Access account specific for your role at the home.

You will need to use the individual secure email address that you gave to the surgery on the request for online account form. Make sure you are able access to this email to verify your email address later in the process.

You will need to create a password and a memorable word during the process

Logging in if you have a patient access account set up

- **Click** https://www.patientaccess.com

- Then click **Sign In** you will need the email address the account was set up with, the password and the memorable word

Logging in for the first time

The first thing you need to do is to **Register** (only done once) for an online Patient Access user account using the details (like those below) sent by 'your healthcare provider' to enable you to link one or many GP practices.

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	Pk3hUGSrKAMu5
ODS Code	F81118
Account ID	222248004518

Note: The account details are unique to you and were provided by John Tasker House Surgery

If more than one GP practice treats your residents, you will need to be link each GP practice to view all residents via the one account.

Passwords must be kept safe and secure and never shared.

- **Click** https://www.patientaccess.com

- Then click **Register**
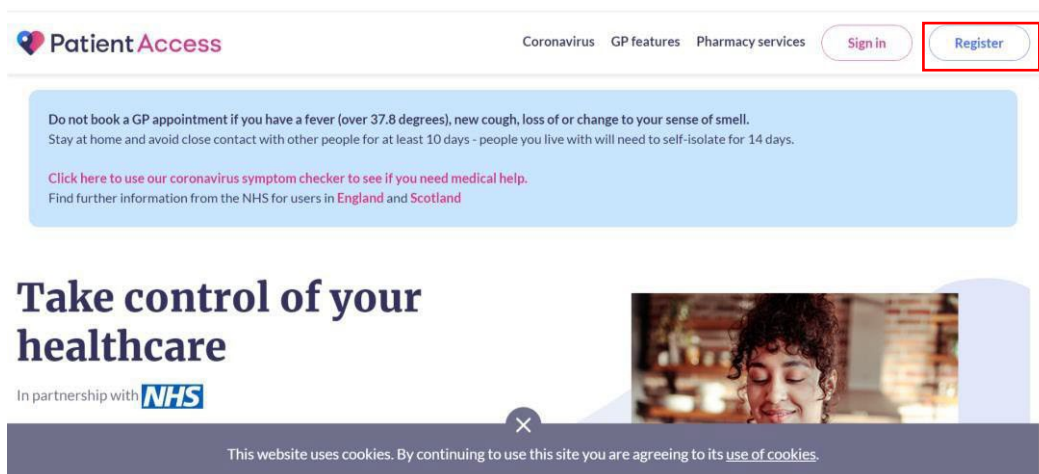
- **Create your Patient Access** (for proxy medication ordering) following the online instructions as below. You will be asked to create a username and password. Enter the **care home** postcode NOT your home postcode

Follow the on-screen instructions to continue setting up your account as below:

Enter your individual secure work email address (not your personal email address). The email must not be in use for another Patient Access account

You will need to create your own password. Follow the guidelines and make sure you can remember it.

Accept the terms and conditions and click

   create account

You may be asked to **create a memorable word**. If you are not asked at this stage, you will be asked later.

Make sure this is something

you will remember Click

continue
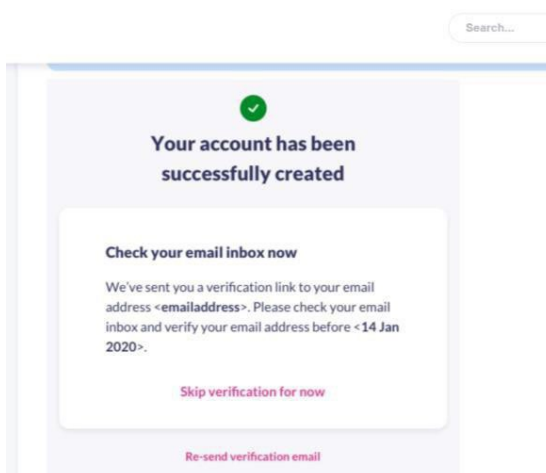
Verify your email: Open your emails and click on the link in the email you were sent to verify the email address - you should see a confirmation notification on the screen.

The confirmation message once your email address has been verified
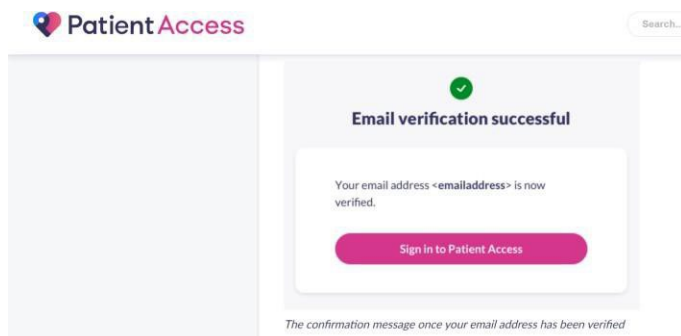
Note: At this stage it is advisable to add a valid mobile number even though will show as optional

To verify the mobile number, click on **'Verify'** next to mobile number. You will then be sent a 6- digit verification code to your mobile, **enter the verification code** into the relevant box. Click on **Confirm.** Your details have now been verified and you should see the following appear next to the mobile number.

✓ Verified

- Log In to https://www.patientaccess.com.

- Click on **your name**.

- Click on **Link Your GP Practice** and follow the instructions on screen.
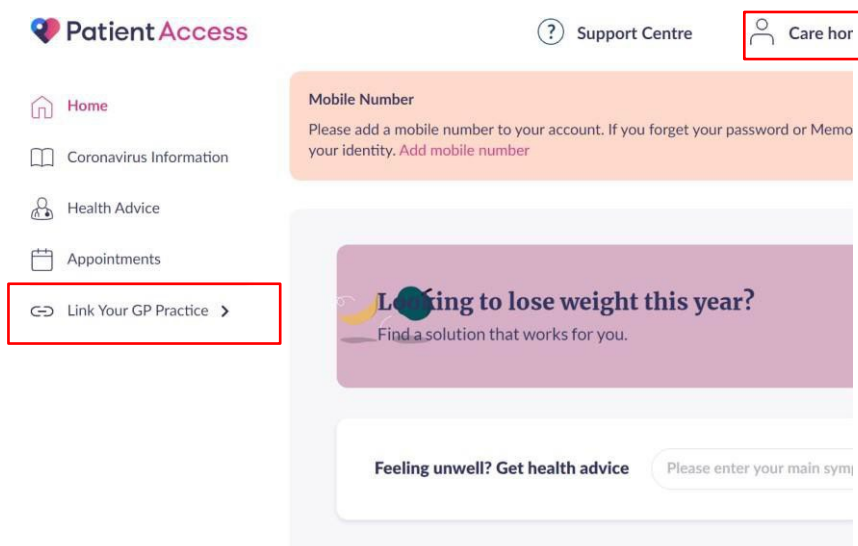
On the next screen put in the practice postcode and

click **search Select** the required practice from list

that appears and click **continue**
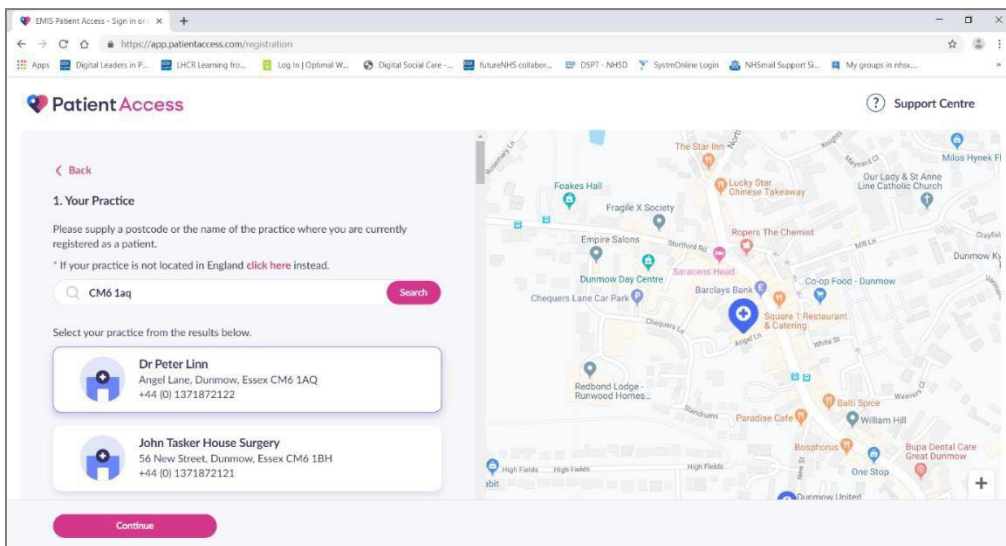
You will now need the email with the details sent to you by the practice you wish to link with. Add the linkage key and account ID EXACTLY as they were given by the surgery. **It is case sensitive.** Click **Confirm**

2. Provide the following online services account details when prompted:	
Linkage Key	Pk3hUGSrKAMu5
ODS Code	F81118
Account ID	222248004518

Note: The account details are unique to you and were provided by John Tasker House Surgery
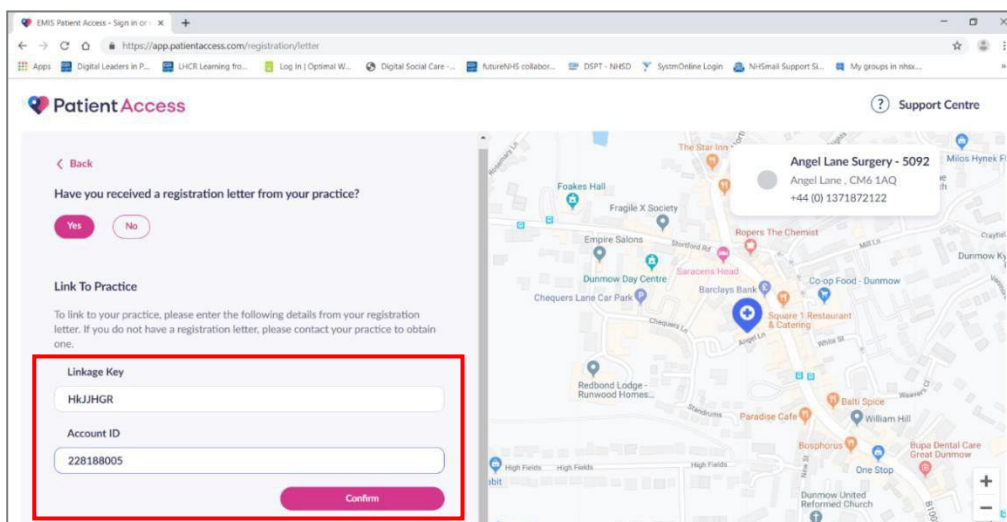
Check your personal details, enter your date of birth, the house name and postcode of the care home, click **continue.** This will be as it was written on the staff access set up request form that was sent to the surgery. **It is case sensitive**.

Check the details. **Enter your password** and **click link account**

Your account should now be linked to the practice

Repeat these steps for all practices that you have been sent a linkage key for.
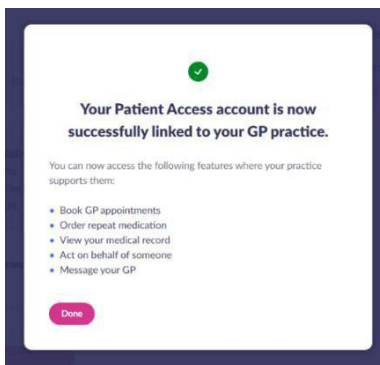
Ordering medication

To order medications and view all linked users, click on your name, and click **Linked Users.** A list of names that you have been linked with will be shown.

Select the patient you need to order for. The example below show patients from two practices. When you select that patient you want, the system knows which GP they are registered with.
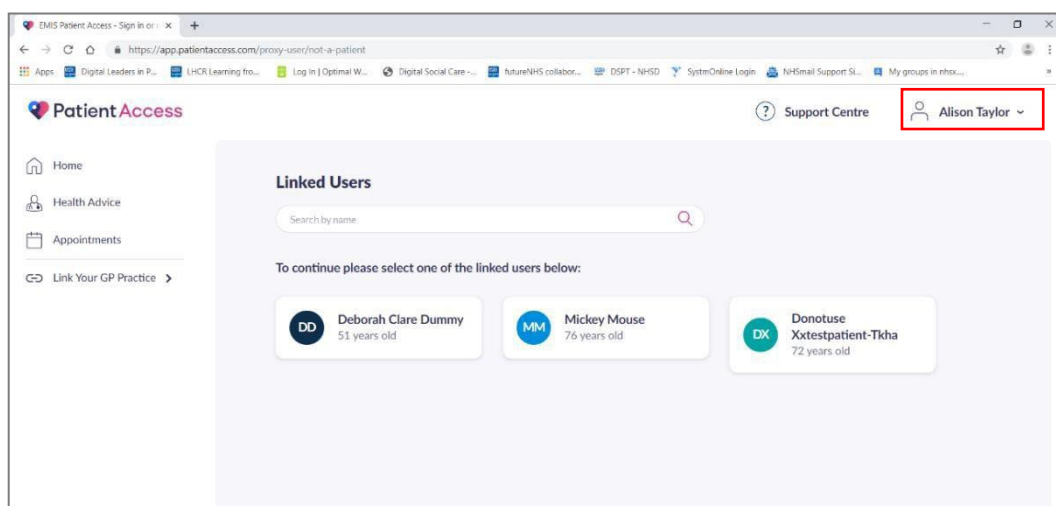
- In the Medications requests box, select **New request**.
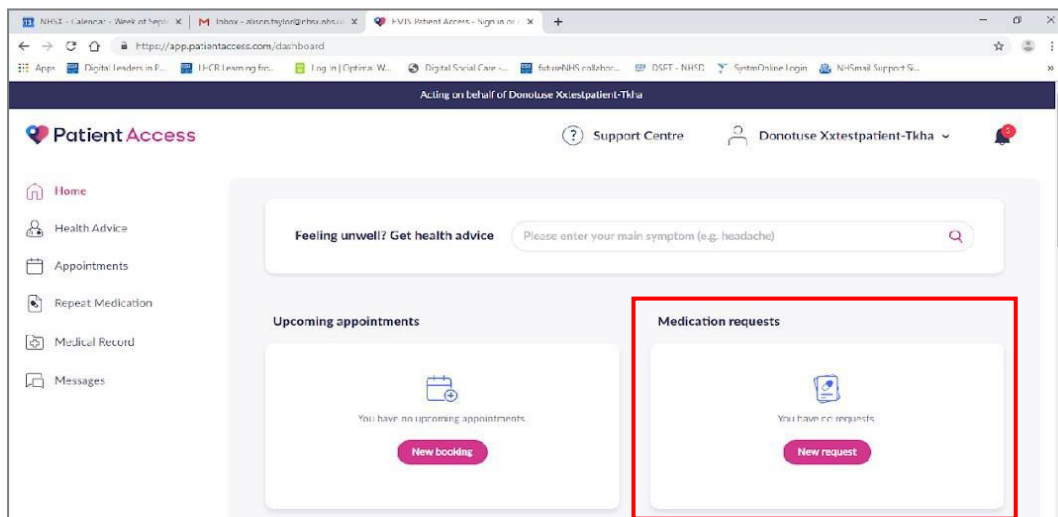
- You will see a 'Gentle reminder' message.

- Click **Confirm** to continue.
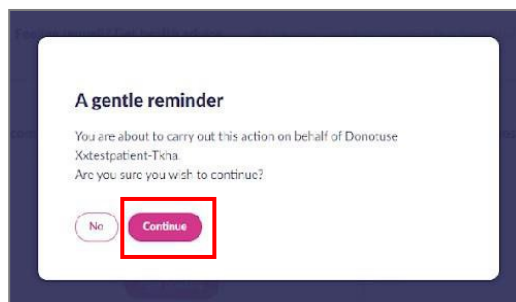
- Select medications individually by **+ button** OR on right-hand side **Select all medications** button. You are able to see the date of last issue the quantity prescribed for each medication and the directions for use.
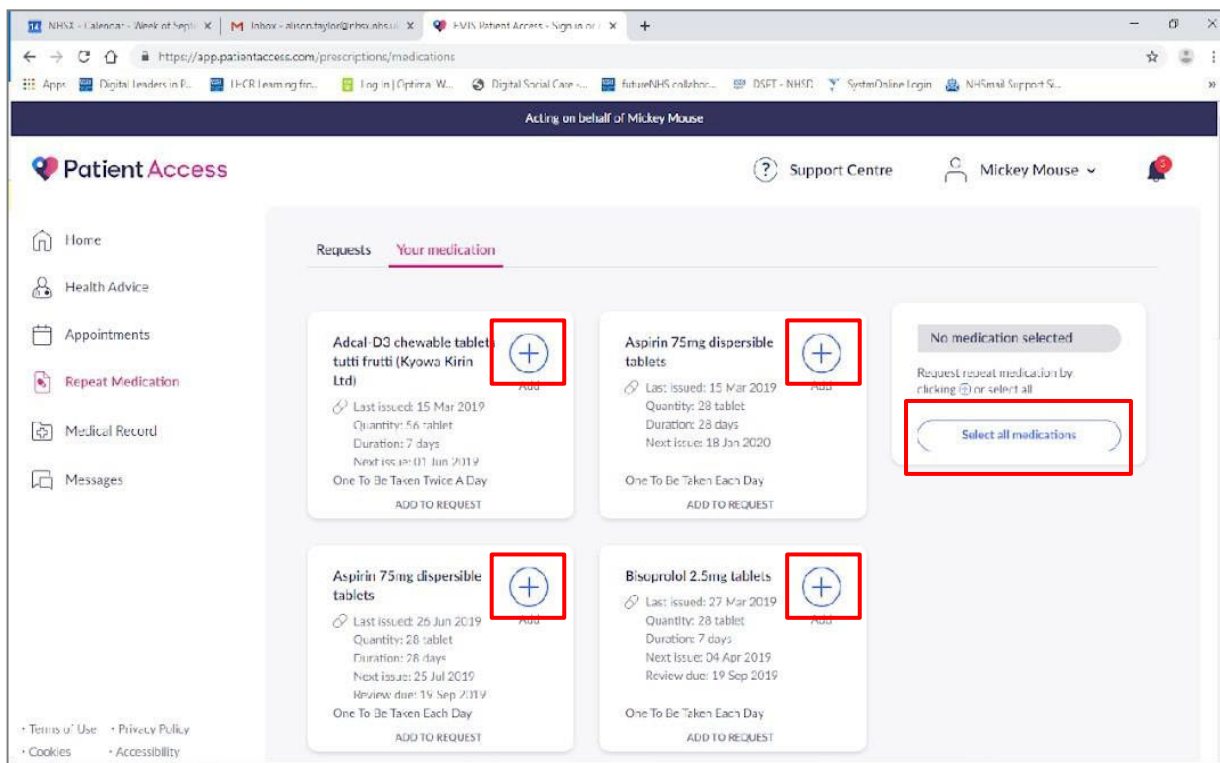
- Confirm **Request medications** button bottom right-hand corner.
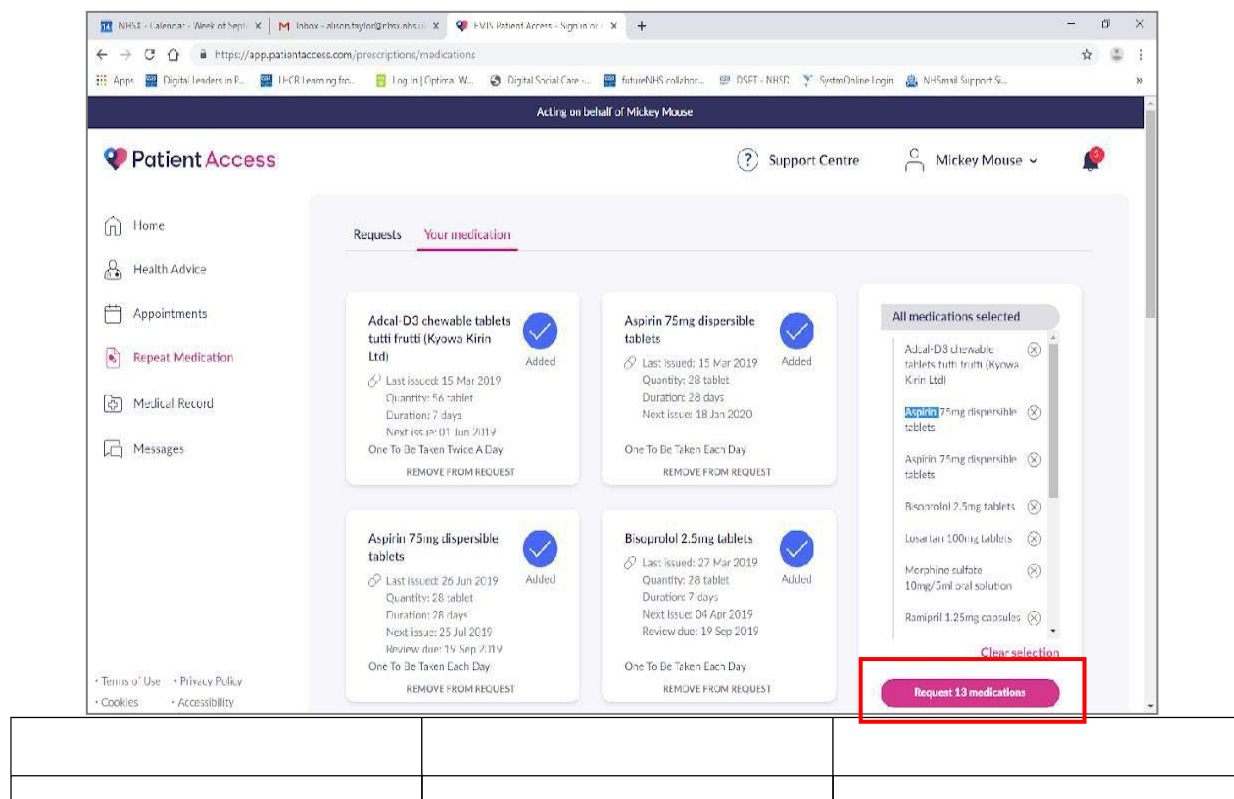
- Review your request, as below.

- Interim request or shortfall requests can be requested by adding the information to the
  Message for your practice section

- Click **Confirm request.**
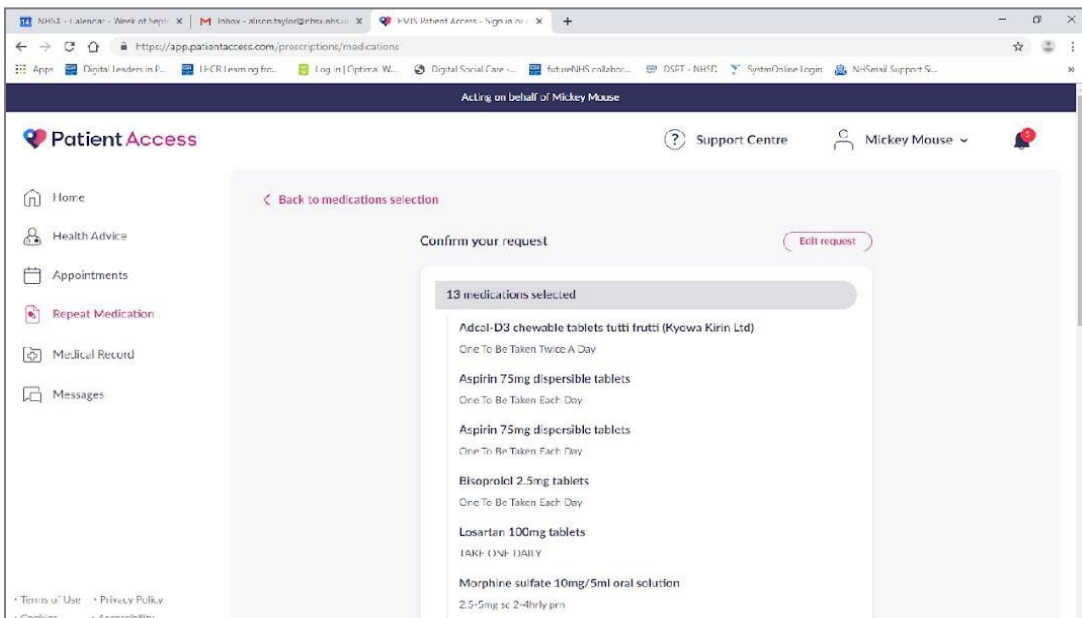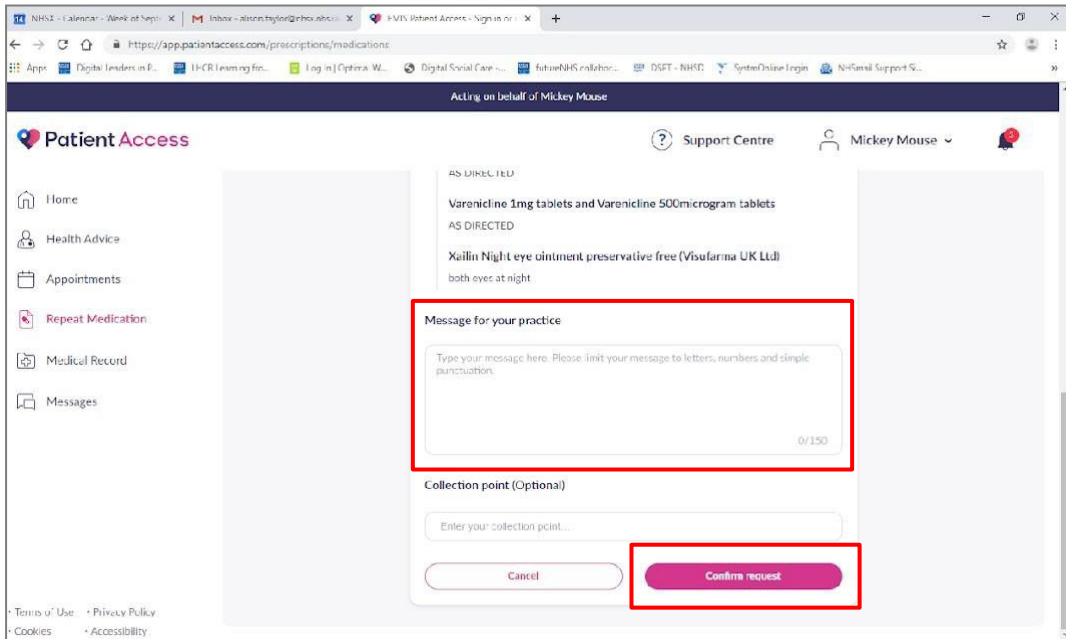
- Click **Done**
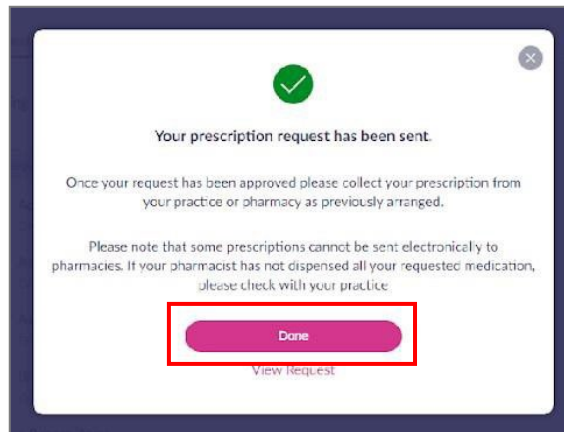
- Nominated pharmacy should be shown here – if a pharmacy has not been selected or it is not correct then click on nominate pharmacy and follow-on screen instructions
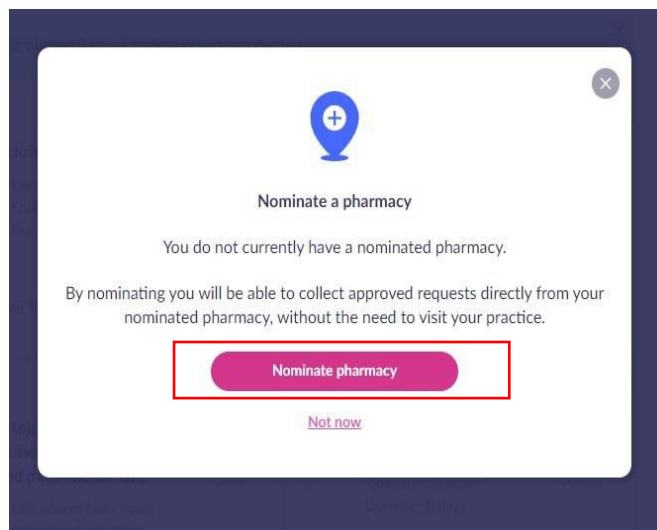
- You will see a **pending request** message

- **Cancel a pending request –** if you realise that the item is no longer required, and it has not been processed by the GP practice you can click on the 3 buttons in the corner and then click on cancel request made
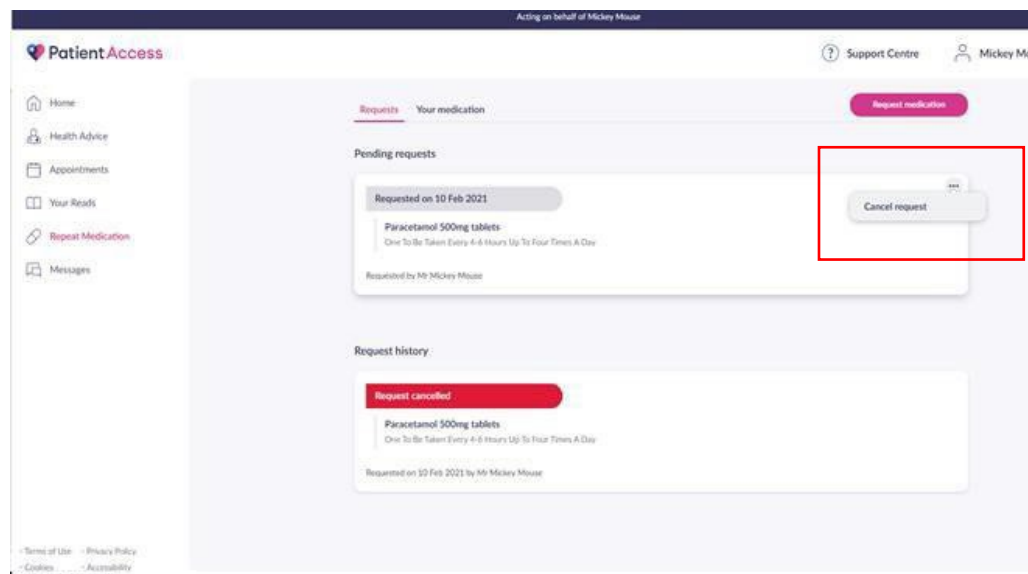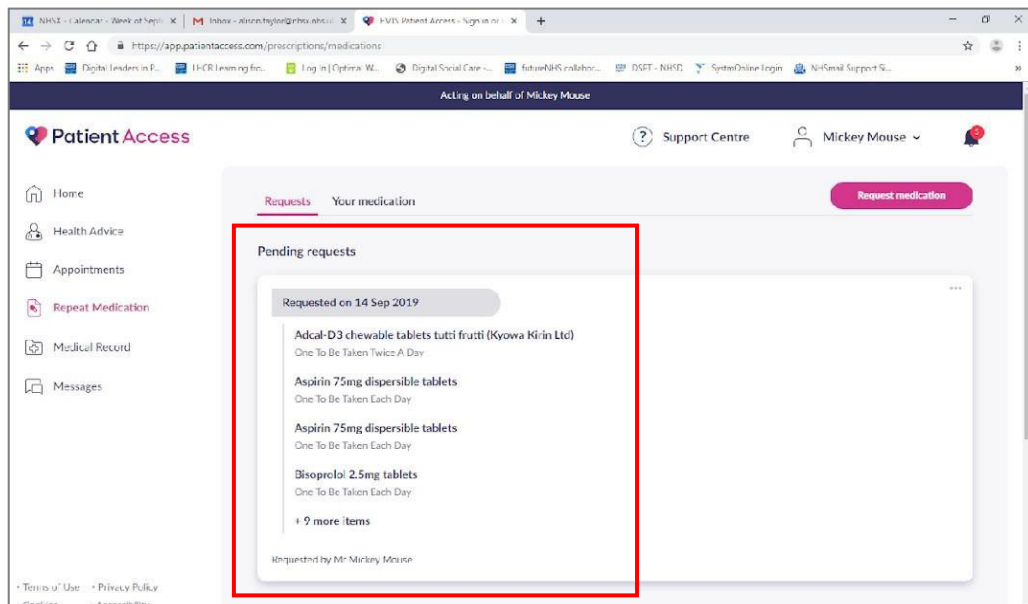
- A **Request rejected** screen will appear if any requested items are not approved, with a note of the reasons. It may be necessary to phone the practice to discuss this.
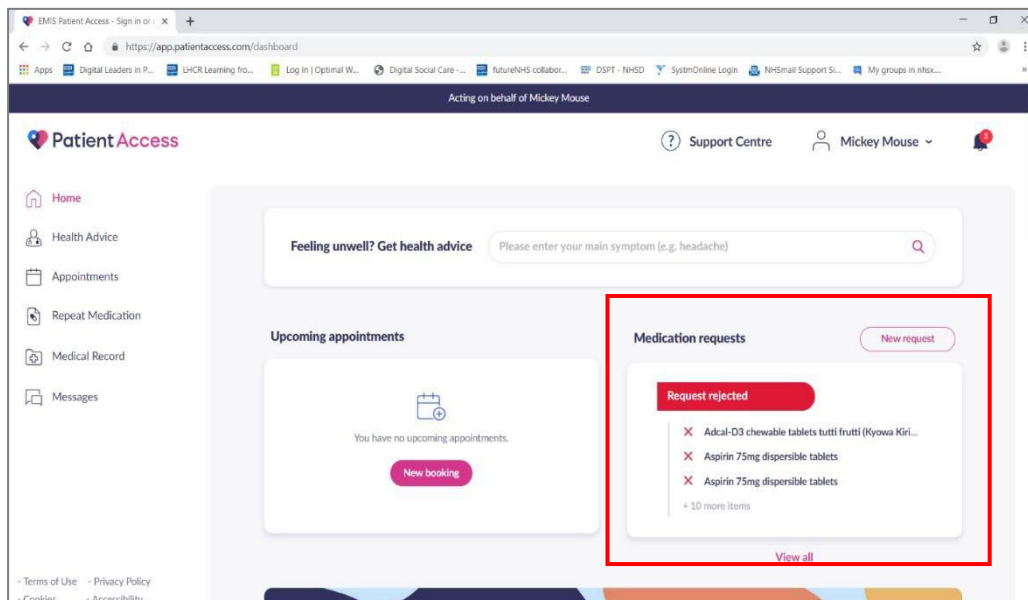
- Medications which are **request approved**, have been signed by the GP and issued the prescription ready for it to be dispensed to your nominated pharmacy for the residents (all completed electronically)
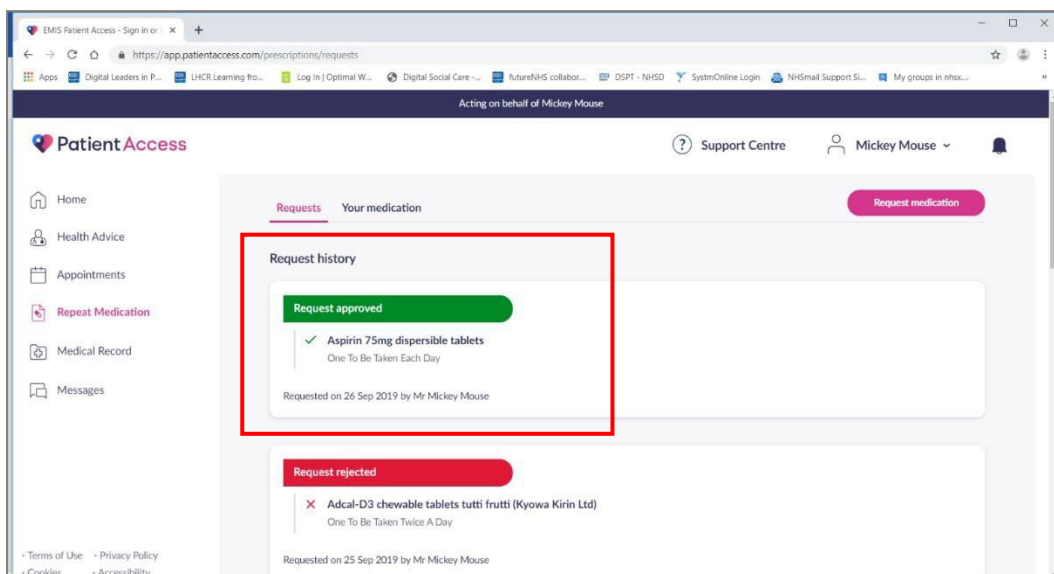
Ordering for another resident

- To request medication for another resident, you need to start again clicking on your name and clicking on linked users.

When a practice adds a resident to their list of patients, you must refresh your account by logging in and out again for the new residents to show under your name.

Log out at when you have finished as best practice, it will timeout if you do not log out. Passwords must be kept safe and secure, never shared, or saved on a device.

Appendix 9 - EMIS Web standard operating procedure | issuing patient access medication requests from patients or through proxy access

Purpose

All dispensary staff and locum staff to know how to issue medication from patient access medication requests in EMIS.

Using this standard operating procedure (SOP) should ensure patients get a prompt and safe service whenever they or their proxy orders through the patient access portal.

Process

- Click on the **Dispensing** screen Icon on the top tool bar of EMIS.

Once the Dispensing screen is opened you will find a list of options on the right-hand side of the screen.
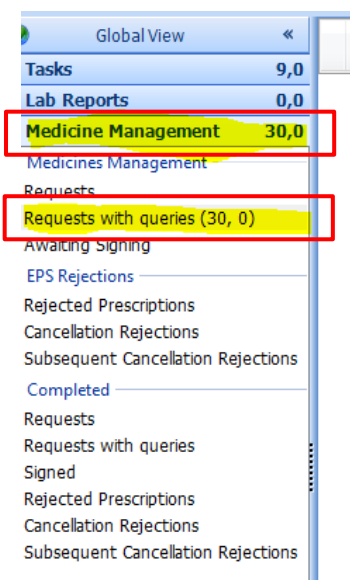
- Right click first on **Medicine Management** and then right click on

Requests with queries.

Opening Request with queries will direct you to a list of tasks sent directly to a named GP via the dispensary or via patient access users.


- On the right-hand side of the screen (as above) you will see a list of names under the heading **Source**. These are the names of people who have sent requests or tasks to the GP.

- Find the name of the patient or their proxy and double click on one specific name which has the words **Online (name ??).**

- Right click on one of the **Online user's name** and then Click once on the **Open** icon to access the request.
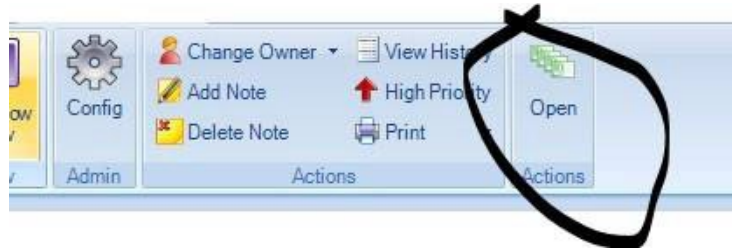
- This will bring you to the patient's request screen.

- The patient or proxy user may have written a message to the GP. This will appear on the top white bar.
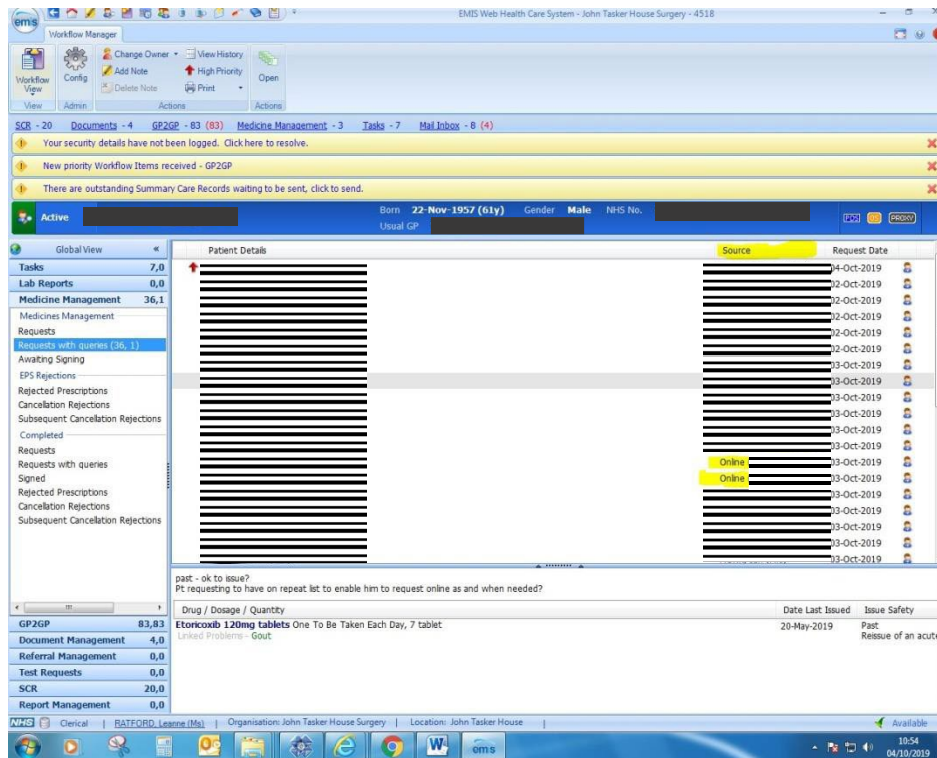
- If the message is a query it needs to be passed to a GP. You can finalise the request by simply clicking on the **Approve and Complete** icon. This will issue the prescription and remove the request from the 'Request with queries' list.
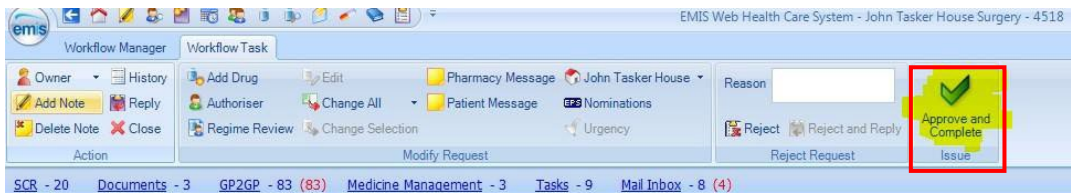
- You should be taken directly to the next patient on the list. If you find that the screen shows a request that has been sent to a GP already then you can move down to the next patient by clicking the **Close** icon.

- Keep clicking **Open**, close the queue until all the patient access requests have been issued or tasked to a GP.
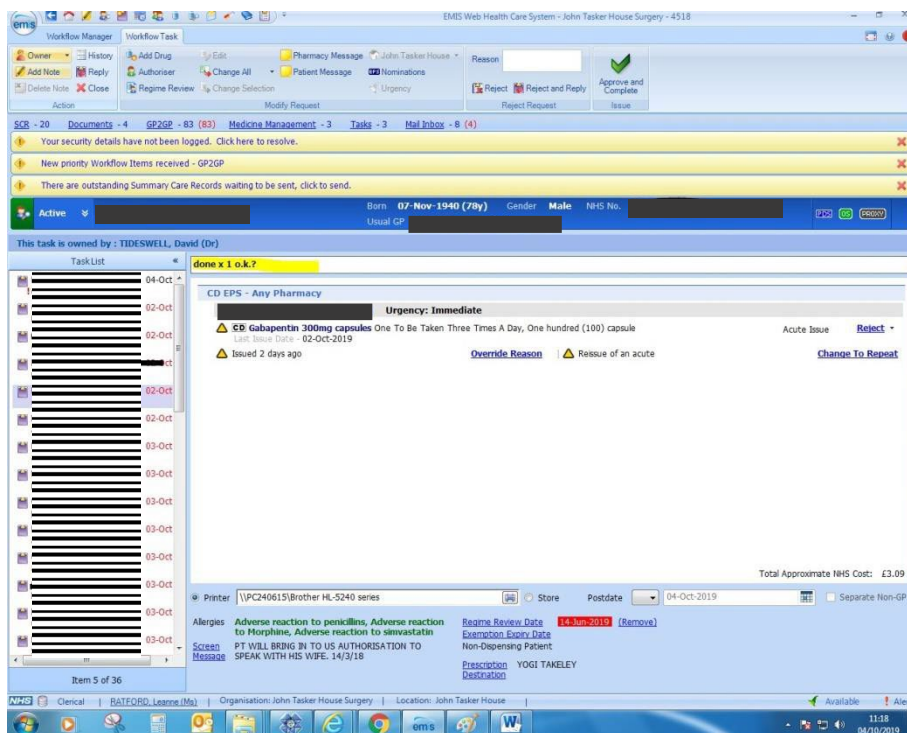
Encountering problems with issue

Some requests cannot be issued automatically. If the message contains a request for a new or different medication, this must be passed to a GP. If there a medication review is required, the Approve and Complete icon will be greyed out and unable to be used.

To be able to issue the request quickly you will need to forward to a GP present on the day, or to a specified GP.

- You can do this by clicking on the **Owner** icon and choosing a GP on the drop-down options.
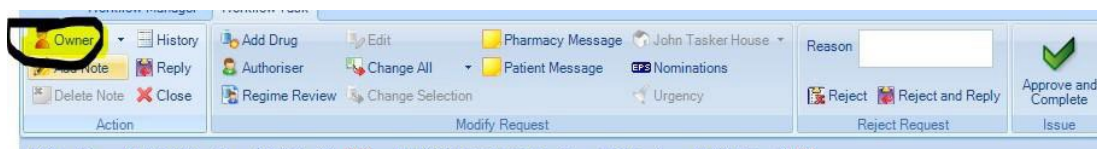
- You must also add a note to the request by clicking the **Add Note** icon on the screen.
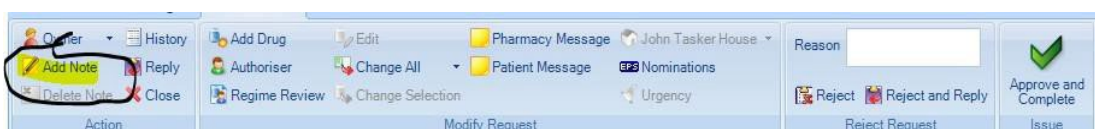
- Add a note to the note box provided. 'Disp seen' is enough although a more detailed note would be helpful if the note on the top of the screen is requesting a new medication or a change of dose / strength.

- The GP will then issue or refuse the request once they have reviewed it.

Direct patient requests can be sent to either the dispensing queue or printed and sent to one of the local nominated pharmacies as per destination recorded on the patient's prescribing screen.

Non-dispensing patients' prescriptions will automatically print out. Dispensing patients who go to the chemist will have to be changed whilst issuing.

- You can do this by clicking the **Change All** icon. Choose the printed prescription on the drop down and the prescription will print out.

- You can also choose to send an issue to either your in-house queue or another dispensing queue. You can do this by clicking on the **House Icon** and choosing the surgery destination.