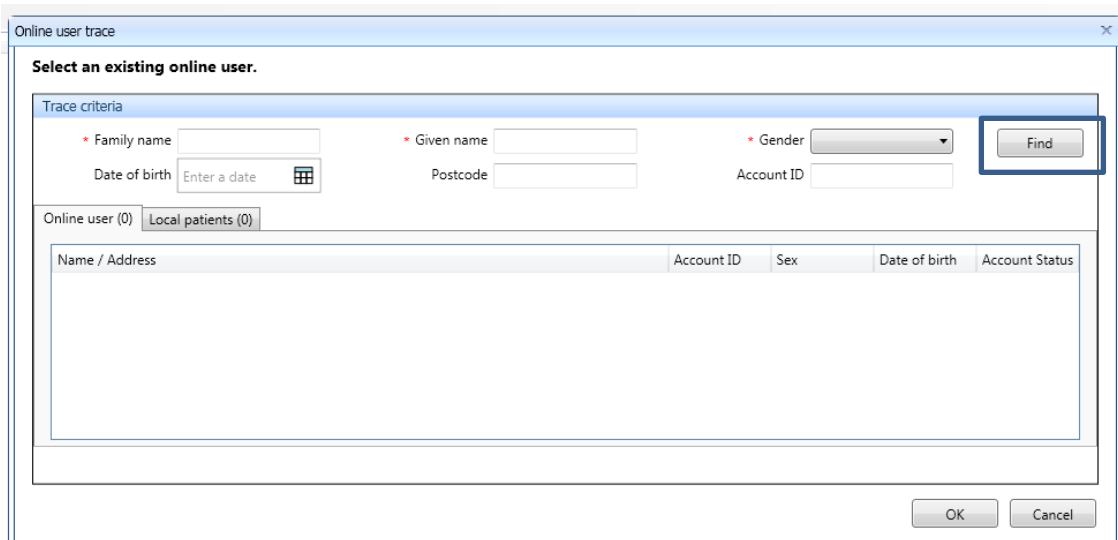


EMIS User guide for GP practices to set up a New Proxy User

- 1) Have an up to date resident list/report available
- 2) Scan and save all staff and resident authorisation forms before starting set up
- 3) Access the registration screen in EMIS
- 4) Select the required patient
- 5) On the registration screen, click the **Online Services Tab** within the patients record in the registration screen.
- 6) Click **Add** online user
- 7) Click **Add proxy user**
- 8) 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

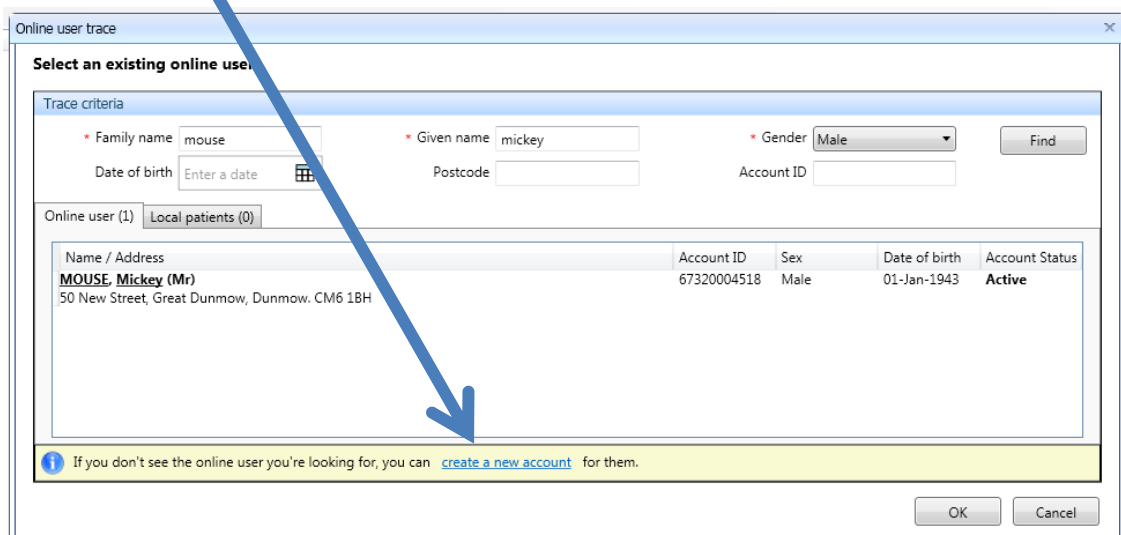
Online user (0) Local patients (0)

Name / Address	Account ID	Sex	Date of birth	Account Status
No results found.				

OK Cancel

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.

- 9) Click **Create a new account**



Online user trace

Select an existing online user.

Trace criteria

* Family name mouse * Given name mickey * Gender Male

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

create a new account

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

OK Cancel

Next patient you add to this new account you will select the user you have just created and click link user.

The screenshot shows the 'Online user trace' window. At the top, there are tabs for 'Status History', '6. Audit History', and '7. GP2GP'. The main heading is 'Select an existing online user.' Below this is a 'Trace criteria' section with input fields for 'Family name' (Taylor), 'Given name' (Alison), 'Gender' (Female), 'Date of birth', 'Postcode', and 'Account ID'. A 'Find' button is to the right. Below the search criteria, there are two tabs: 'Online user (1)' and 'Local patients (3)'. A table displays the search results:

Name / Address	Account ID	Sex	Date of birth	Account Status
TAYLOR, Alison (Miss) RM7 0DS	46152014107	Female	24-Dec-1974	Inactive

At the bottom of the window, there is a 'Link' button and a 'Cancel' button. A yellow banner at the bottom contains the text: 'If you don't see the online user you're looking for, you can [create a new account](#) for them.'

10)Details – Complete fields and you **MUST Verify Email address** click next.

The screenshot shows the 'Online user' details form for 'MOUSE, Mickey'. The 'Details' tab is selected. The form is divided into sections: 'Demographics', 'Contact details', and 'Other contact information'. The 'Email verification' dropdown is highlighted with a red box and set to 'Unverified'. The 'Next' button at the bottom is also highlighted with a red box.

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: []

Buttons at the bottom: Back, Next, OK, Cancel.

11) ID verification – click ADD to add the verification document from the staff member already saved – click next.

Online user

Details

ID Verification

Access

Legal basis

Online user: MOUSE, Mickey

Verifications

Add a new identity document for this online user.

+ Add... Edit... Delete

Method	Additional information	Document Type	Date
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Back Next OK Cancel

12) Access – complete relationship to patient field, untick services not needed by the proxy user - click next.

Online user

Details

ID Verification

Access

Legal basis

Online user: MOUSE, Mickey

Linked patient

Patient XXTESTPATIENT-TKHA, Donotuse (Mr)

* Relationship to patient

Services

<input checked="" type="checkbox"/> Appointments	Requested
<input checked="" type="checkbox"/> Repeat prescriptions	Requested
<input type="checkbox"/> Messaging	
<input checked="" type="checkbox"/> Demographics	Requested

Record access

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

Back Next OK Cancel

13) Legal Basis – untick access for Appointments and Core Summary Record to Decide Later - click Legal Basis - **Legal basis type**

Online user: MOUSE, Mickey

Legal basis

Access to the following services on MCNAMARA, Elsie (Mrs)'s account have been requested. Legal basis is needed for MOUSE, Mickey to access these services.

- Appointments Allow access Reject Decide later
- Repeat prescriptions Allow access Reject Decide later
- Demographics Allow access Reject Decide later
- Core summary record Allow access Reject Decide later

[What is legal basis?](#)

Legal basis type	Method	Additional information	Date

Select 'Explicit Consent'

Add legal basis

Legal basis options.

* Legal basis type

* Method

Method – Select 'Written or verbal' if written you will have to upload the patient authorisation form which is already on their record so can choose verbal and add a note – click next – click next – click save

If Legal basis appears again click Not Now and OK



14) Issue PIN documents by selecting 'Email PIN' (ensure user has a verified primary email address recorded before issuing the PIN)

Example of what user will receive via email

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:

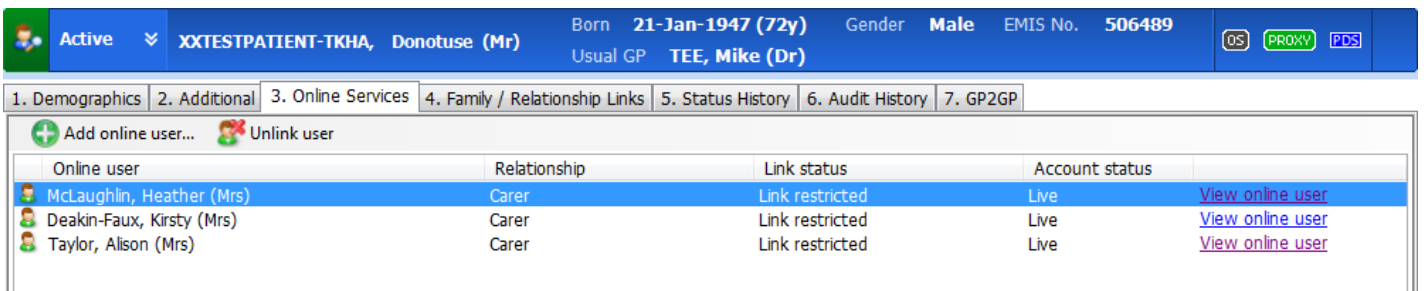
Service provider	Website
Patient Access	https://www.patientaccess.com

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

Linkage Key	Pk3hU [REDACTED]
ODS Code	F [REDACTED]
Account ID	2222 [REDACTED]

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

15) Online user account is created with an account status as **Active**, enabling user to start ordering medications by proxy once they have activated their account. This can be viewed under Account status in the online user screen.



The screenshot shows the NHS online user management interface. At the top, the user profile for Donotuse (Mr) is displayed with details: Born 21-Jan-1947 (72y), Gender Male, EMIS No. 506489, Usual GP TEE, Mike (Dr). The interface includes tabs for Demographics, Additional, Online Services, Family / Relationship Links, Status History, Audit History, and GP2GP. The 'Online Services' tab is active, showing options to 'Add online user...' and 'Unlink user'. Below this is a table listing online users:

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

16) Repeat step 1 to 9 for each patient that the 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

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 ODS	46152014107	Female	24-Dec-1974	Inactive

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

Staff member leaves care home:

Search for online user:

EMIS Web Health Care System - North Street Medical Care - 14107

Registration Patients Online users

Find online user Edit user Close account Identity verification Print PIN Email PIN Print and email PIN Reset account key

Report Management - 7 SCR - 12 Documents - 2 Medicine Management - 6 (6) Registration - 1097 (90) Lab Reports - 59 (21) Tasks - 2 (1)

You have 1 screen message. Click this link to view.

New priority Workflow Items received - Tasks, Lab Reports, Registration, Medicine Management

Online user: TAYLOR, Alison (Mrs)

Demographics	Contact details
Title Mrs	House name/Flat number
Family name taylor	Number and street
Given name Alison	Village
Date of birth 24-Dec-1974	Town/city
Main Language	County
	Postcode
Status	Home telephone
Account status Active	Mobile telephone
	Email address alison.ta

Online user trace

Select an existing online user.

Trace criteria

* Family name * Given name * Gender

Date of birth Postcode Account ID

Name / Address	Account ID	Sex	Date of birth	Account Status
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Linked patients

Edit online user access Legal basis

Click on user and Select

EMIS Web Health Care System - North Street Medical Care - 14107

Registration Carers Online users

Find online user Edit user Close account Identity verification Print PIN Email PIN Print and email PIN Reset account key

Report Management - 7 SCR - 12 Documents - 2 Medicine Management - 6 (6) Registration - 1097 (90) Lab Reports - 59 (21) Tasks - 2 (1)

You have 1 screen message. Click this link to view.

New priority Workflow Items received - Tasks, Lab Reports, Registration, Medicine Management

Online user: TAYLOR, Alison (Mrs)

Demographics

Title **Mrs**

Family name **taylor**

Given name **Alison**

Date of birth **24-Dec-1974**

Main Language

Status

Account status **Active**

Contact details

House name/Flat number

Number and street

Village

Town/city

County

Postcode

Home telephone

Mobile telephone

Email address **alison.ta**

Linked patients

Edit online user access Legal basis

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

Name / Address	Account ID	Sex	Date of birth	Account Status
TAYLOR, Alison (Mrs)	46301014107	Female	24-Dec-1974	Active

Select Cancel

Click on close account

EMIS

Registration Carers Online users

Find online user Edit user Close account Identity verification Print PIN Email PIN Print and email PIN Reset account key

Report Management - 7 SCR - 12 Documents - 2 Medicine Management - 6 (6) Registration - 1097 (90) Lab Reports - 59 (21) Task

You have 1 screen message. Click this link to view.

New priority Workflow Items received - Tasks, Lab Reports, Registration, Medicine Management

Online user: TAYLOR, Alison (Mrs)

Demographics

Title **Mrs**

Family name **taylor**

Given name **Alison**

Date of birth **24-Dec-1974**

Main Language

Status

Account status **Active**

Contact details

House name/Flat number

Number and street

Village

Town/city

County

Postcode

Home telephone

Mobile telephone

Email address **alison.taylor@nhsx.nhs.uk** **Verified**

Select from drop down list as appropriate

Click **Close account**

The screenshot shows the EMIS Web Health Care System interface. The top navigation bar includes 'Registration', 'Carers', and 'Online users'. The 'Online users' section contains icons for 'Find online user', 'Edit user', 'Close account', and 'Identity verification'. A blue arrow points from the 'Close account' icon to a 'Close account' dialog box. The dialog box contains a warning icon and the following text: 'This online user is linked to the following local patient(s): - MOUSE, Micky (Mr). If you close this account, the above patient(s) will no longer be linked to this online user.' Below this is a dropdown menu for 'Select a reason for closing this account:' with 'Online user request' selected. At the bottom of the dialog are 'Close account' and 'Cancel' buttons. The background shows the user profile for Alison Taylor, with fields for Demographics and Contact details.

Demographics		Contact details	
Title	Mrs	House name/Flat number	
Family name	taylor	Number and street	
Given name	Alison	Village	
Date of birth	24-Dec-1974	Town/city	
Main Language		County	
		Postcode	
Status		Home telephone	
Account status	Active	Mobile telephone	
		Email address	alison.taylor@nhsx.nhs.uk Verified