Ordering medication using proxy access

Guidance for Care settings and GP practices

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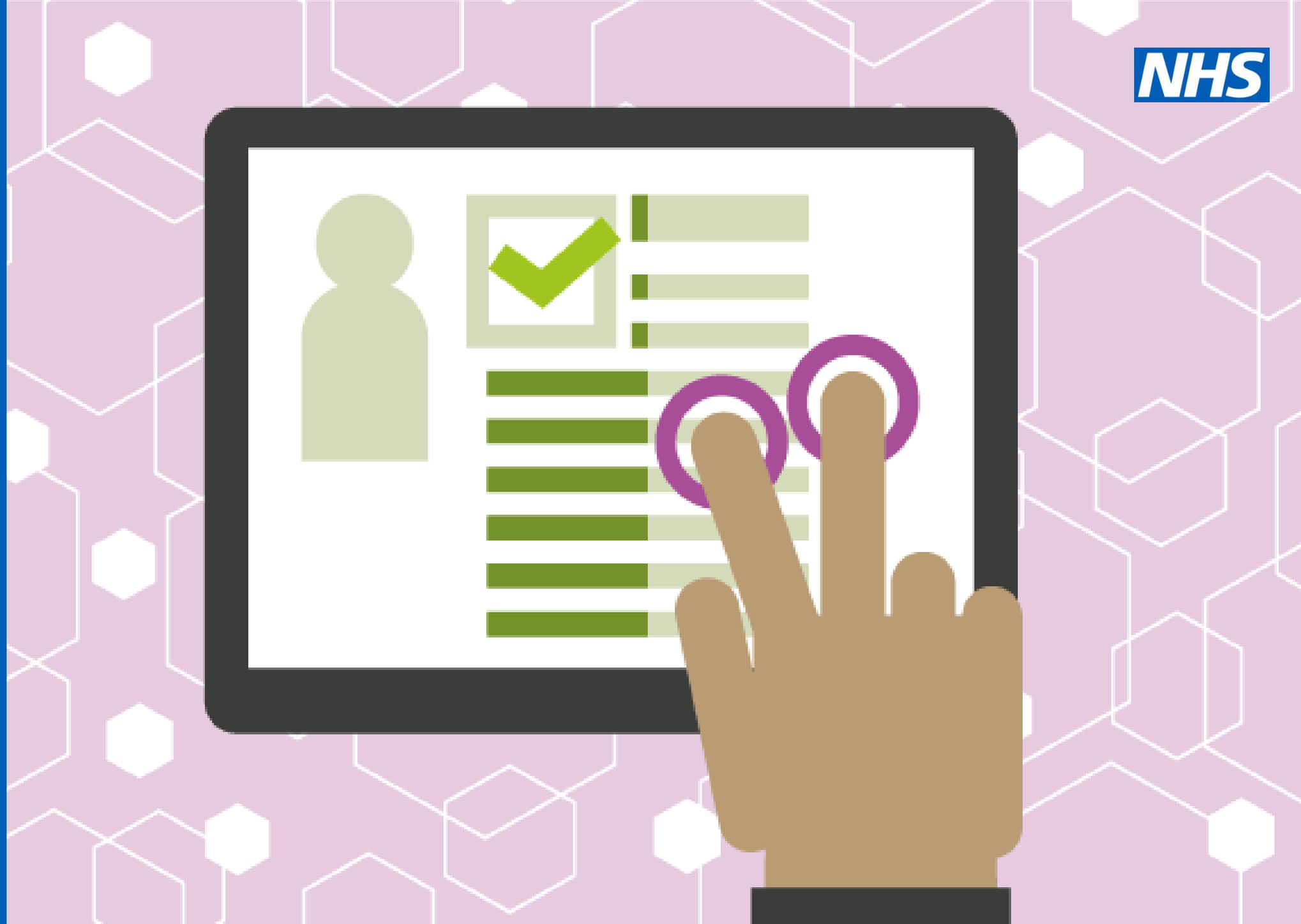


Using this guide

Navigation

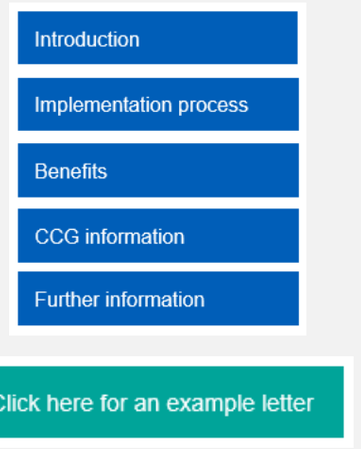
This guide has been developed to allow you to easily navigate to the information you need, whether it is contained in the guide itself or linked to a website.

All buttons can be clicked on.

Quick links at the bottom left of each page

Navigation buttons at the bottom of each page.
The home button takes you to the contents page.

Examples of other links within this guide



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Proxy access via GP online services

This guidance describes how care homes and GP practices can setup the processes which will enable care home staff to order repeat medications on behalf of their residents. This is referred to as proxy access throughout this document.

This service uses the GP online services functionality which is already implemented and widely used by patients and GP practices.

Care home staff will not receive access to the GP clinical system or the patient's record through this process.

Other GP online services options are available, such as booking and cancelling appointments and accessing test results. Although this is not covered in this guide, similar permission must be obtained from the resident.

This project supports the aims of the Long Term Plan (LTP) and the Enhanced Health for Care settings (EHCH) programme. These are supporting care settings to become digitally mature, bringing benefits to both staff and residents from the wide range of online services currently available and in development.

Data Security and Protection Toolkit

Register for a NHSmail account

GP online services

Since 2005, GP practices in England have offered their patients access to a number of online services, such as online appointment booking and repeat prescription ordering, and viewing the information the practice holds about them in their GP patient record.

GP online services has helped to

- enhance the quality of care provided
- increasing choice and convenience for patients.

How does proxy access work in GP online services

Proxy access was developed to allow people nominated by the patient to have access to and manage aspects of their GP online services account. They are provided with their own account rather than using the patients login details.

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.

Why proxy access?

Proxy access for care staff to a resident's online account is a simple option for enabling them to order medication, book appointments and access information such as test results on behalf of the individual.

This will allow authorised care staff who have been setup by the GP practice,

- To be set up with an individual account to access the patient/resident record/s in the associated GP system via an online website
- Select which medication needs re-ordering
- Request that medication
- Be able to put a note: for example if medication is not available for ordering they can put this in the note that it is due - it is a very common issue at the start - medication review by GP overdue and decreases over time a the GP embeds the new process
- Audit trail of when and what's been ordered, processed for authorisation and dispensed.

Security and governance

Proxy access can bring with it risks to the security and privacy of the patient's personal information. Most GP practices already have existing processes to manage this.

To mitigate against these risks it is essential that:

- There is a data sharing agreement between the care setting and the GP practice
- All authorised care setting staff are up to date with IG compliant training
- Ensure a process is in place to manage any breach of confidentiality or misuse of the system.

RCGP Guidance on Proxy access for direct care

To support GP practices with implementing GP online services, the RCGP developed a set of resources. Specific guidance was produced for proxy access and the considerations and safeguards that need to be in place for it to be used safely.

As mentioned in the introduction, GP online services not only cover medicine ordering, but also access to the patient's record, test results, hospital correspondence, and appointment booking.

There could be benefits for the patients, if their career have access to these other elements, for example better communication between the care provider and the NHS. However, there are also risks for the patient, GP practice, and the care home and its staff.

Patient confidentiality is essential, and each patient must be fully aware of the implications of sharing their GP record with another person. There may be information in their record which is irrelevant to their current care and that they may not want to share.

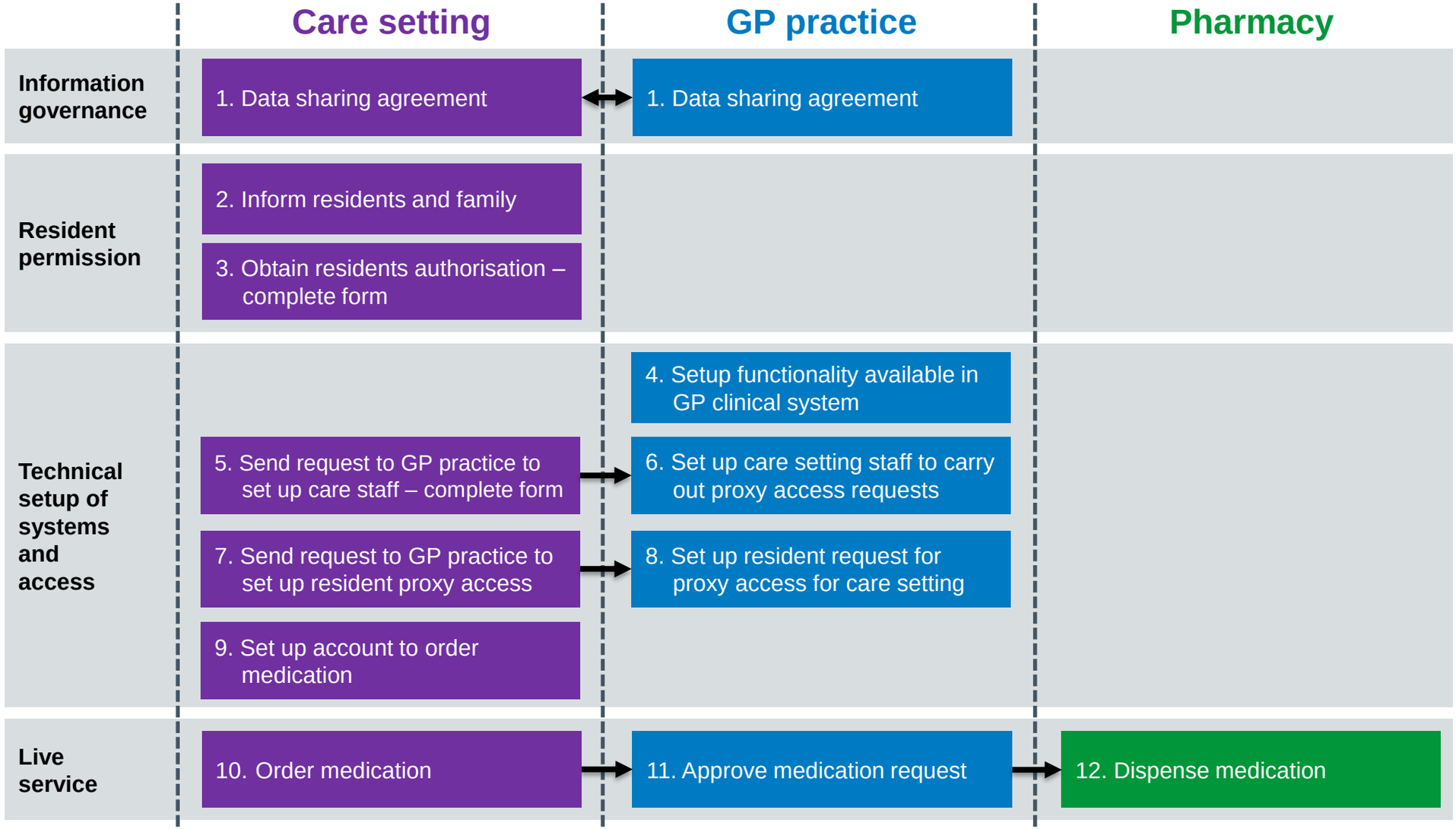
The information in the record may not be complete, and as such, this must be taken into consideration if clinical staff use it support clinical decision making. They should seek advice from GP practice clinicians rather than rely solely on the proxy record.

Best practice guidance	Click here
Patient information	Click here – GP Online Services
Programme information	Click Here – Online Health & Prescriptions

Implementation

Process flow diagram

Click on each step and you will be taken to further information on that topic



Data Security and Protection Toolkit

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1. Data sharing agreement

Care home and GP practice sign a data sharing agreement

What is a data sharing agreement? Click here to view NHS Digital website.

Click and download document 2a on Future NHS platform for the Data Sharing Agreement template that the Care setting and or pharmacy staff must complete and share with the practice.

This Data Sharing Agreement facilitates the lawful, safe and secure sharing of information, according to the General Data Protection Regulation (GDPR) 2018 and the Data Protection Act 2018, between the GP practice and the Care setting on behalf of all residents registered at the setting for ordering by proxy medications via GP online services.

Data Security and Protection Toolkit

Register for a NHSmail account

Click here to go back to implementation process flow diagram

Care home informs residents about ordering medications via proxy access on their behalf

All residents and their families should be informed the care setting will be changing from paper to an electronic process for ordering medication on their behalf.

Click here and download document 2b from the Future NHS platform

This letter can be handed to residents and families, posted or emailed if preferred.

One-to-one explanations with the resident and families can be followed up as requested at the time.

Advisory note: If the patient has capacity issues, further information slide 14

3. Obtain residents authorisation and complete form

Care home obtains signed consent from each resident for proxy access for medication ordering

Before proxy access for medication ordering can be set up, authorisation must be obtained from the patient/resident.

If the resident lacks capacity, under the Mental Capacity Act (MCA) authorisation can be given by:

- their next of kin in best interest
- the care setting staff that are responsible for medications in best interest or
- Power of Attorney (POA) with health

The GP makes the final decision, if they are in doubt they will not grant proxy access and should follow up with the patient/resident and families to explore further options.

Advisory note
Allow 2-3 weeks at the start of this project for this step to be completed.

Click and download document 2c on the Future NHS platform

4. Setup GP clinical system

Existing set up for proxy access in the GP systems is available in 3 out of 4 GP systems used nationally.

This guidance to implement proxy access is not for those practices that have not started patient access to GP Online services at all in their practice.

5. Care Setting send request to GP practice to set up staff

- Send request to GP practice to set up care setting staff
- Care setting complete form
- Care setting emails completed staff form to practice

Click here and download document 2d on the Future NHS platform

6. Set up care setting staff to carry out proxy access requests

7. Send request to GP practice to set up resident proxy access

Set up care setting staff to carry out proxy access requests

Once the form has been received by the surgery, it should be saved to a shared folder for access when setting up a patient/resident by proxy request from a care provider.

Care home requests access from the GP practice

1. Care setting sends the completed authorisation form to the practice via email
2. The GP practice scans form to EPR
3. The GP practice sets up the patient/resident for proxy access to associated care staff.

Data Security and Protection Toolkit

Register for a NHSmail account

Click here to go back to implementation process flow diagram

8. Set up resident request for proxy access for care setting

Important note: If proxy setup has been used before, you MUST ensure that you set the proxy care staff user up WITHOUT an NHS number.

Next step: When all these documents from steps 1-7 are completed, scanned and filed in the appropriate place at the practice online set up of users and staff ordering can be progressed.

Clinical System Guides

Click here and download - the user guides are available to download on the Future NHS platform, Digital Primary Care workspace.

2e. TPP

2f. EMIS

2g. Microtest

Vision
not currently available

9. Set up account to request medication and order medication

Care home sets up account and orders medication for their patients

Once set up of the care setting worker is complete and proxy access given by the practice, the staff have to verify and set up their individual accounts so they can start ordering medications online for their residents.

To be set up with an individual account to access the patient/resident record/s in the associated GP system via an online website please see user guides below for setting up and ordering medication

Click here and download - the user guides are available to download on the Future NHS platform, Digital Primary Care workspace.

TPP
2h.

EMIS
2i.

Microtest
2j.

10. Approve medication request

GP practice authorises (or rejects) the medication request

When ordered by the care setting on an agreed date monthly with practice, care home and pharmacy, the prescription/issuing clerk at the practice will process the online requests along with the normal process in their practice for doing this with on line prescriptions for individuals.

If the practice is not doing online prescriptions for individuals in the practice then this project cannot be implemented until this managed process is put in place.

Once signed, the practice will follow the process for dispensing and sending medications to the care setting, arrange for collection from the setting of the prescriptions, or liaise directly with the care settings nominated pharmacy.

Click here and download - the user guides are available to download on the Future NHS platform, Digital Primary Care workspace.

- 2k. TPP example SOP for Issuing Prescriptions for Dispensing
- 2l. EMIS example SOP for Issuing Prescriptions for Dispensing

Delivery of prescription

The authorised prescription will be:

- Electronically sent directly to the pharmacy using the electronic prescription system (EPS); or
- Collected from the practice by the pharmacy or the care setting

Once dispensed the medicine will be delivered to the care setting.

Benefits for practices and care settings will be realised from the outset and will grow as proxy access usage increases.

Benefits calculator

The benefits calculator looks at possible time and cost savings within the practice across admin, reception and GP teams by implementing proxy access for ordering medication for care setting residents online.

The benefits calculator is available on the Future NHS platform on the Digital Primary Care workspace.

Click here and download doc 2m.

The benefits calculator which gives an estimated cost saving for your practice and care settings following the implementation process.

Summary of feedback from practices, care settings and pharmacies

✓	Reduction in risks and issues associated with ordering, issuing, collecting and dispensing repeat medications
✓	Reduction in errors and queries (e.g. missing items, 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 allows communications with the practice and other health care professionals via secure email directly for queries or requests
✓	Improved turnaround time for queries due to secure email communications improving patient care
✓	Improved data security as care setting staff access via the proxy user to the registered patients of the GP practice via their own username and password which also saves time
✓	Improved communications and working relationships between all stakeholders

Advisory note: Staff turnover in care settings can be high so there is always a risk that new staff are not aware of the ordering system and therefore revert back to a paper format - it is vital this does not happen. Care settings should ensure a robust process is put in place for leavers and new starters who are responsible for medications ordering and administration tasks.

CCG information

Guidance to support practices and care settings with implementation

CCG example governance good practice document click here and download from NHS Future platform (document 2n).

This document supports practices and care settings with the implementation with proxy access for ordering medications online.

Care settings may choose to use this to localise for an Standard Operating Procedure(SOP) in the care setting if they have not got anything to adapt currently.

This document was produced by the Digital Primary Care team at NHSX from several guides and other materials out there in draft format that have been shared.

Further information

Case study

If you would like to read a case study please click here and download from Future NHS platform (document 2o).

- Case Study: GP Online Services in Care settings – Ordering medications by proxy, Havering, Mid & West Essex CCGs

Other guides in this series

- Data Protection Security toolkit (DSPT) and NHSmail
- Removal facsimile (fax) machines from general practice

Contact us

If you require further information please contact the Digital Primary Care team at:

digitalprimarycareengland@nhsx.nhs.uk