

North Yorkshire and Vale of York Medicines Management Teams  
(Social Care)

# GP Practice Guidance for Setting up Online Ordering of Medication for Care Homes

(SystemOne Practices)

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## Target Audience

This guidance is for GP Practices in the North Yorkshire and Vale of York Clinical Commissioning Groups to support online ordering for people in care homes.

This version should be used where the SystmOne electronic medical record system is in use.

## Introduction

Ordering medication is a routine but vital part of the management of medicines in care homes and carries a significant workload for practices and care homes.

Currently most care homes do this using the paper repeat slip provided by the surgery. This has to be physically taken to the surgery and the paper requests sorted by the surgery staff and transferred to the computer system.

Moving to an online ordering process means that the request is transferred directly and securely to the surgery from the care home in a simple electronic process making the process easier and safer to manage.

This guidance shows how to achieve this using the proxy access function of the SystmOne practice system.

## Information governance

The proxy access function allows the practice to control who accesses the records electronically and importantly what parts of the record can be accessed. A clear audit trail is accessible to show who has accessed the system, what has been ordered and when.

It also allows the practice to give one level of access for the patient and another for the nominated proxy if required.

For the purposes of proxy online ordering of medication

- Limit access for the proxy to the medication ordering section of the record.
- Only permit proxy access to named staff who have their own online account set up which is linked to the care home.
- Use secure email (for example, NHS mail) to transfer confidential information if needed.

Care homes, as registered services, must maintain the confidentiality of the information they hold and receive about the patient. There is also a duty to share information when needed for patient care.

Before proxy access is granted, the agreement of the patient is sought and documented or a best interests decision can be made by the surgery where the patient lacks capacity and there is no person with legal authority to make the decision for them.

**The GP practice retains the right to withdraw online access if they believe it is being used inappropriately.**

## Setting up proxy access for care home staff

There are several steps to follow to set up and maintain the online proxy access. The practice may find it helpful to have a staff member nominated to lead to on the project.

All staff who are involved in the management of prescriptions at the surgery will need to be familiar with the online ordering process.

## Setting up care home staff for proxy ordering

Members of staff who are required as part of their job role to undertake the routine medication order for the home will need to be set up at the surgery with their own online account on behalf of the care home before online proxy ordering can be started.

Requests for the set-up of this account should be made using the [Request for online account for care home staff](#) form. Each individual member of staff requiring an account must complete the form to confirm that they understand their responsibilities to treat all information confidentially.

You should provide the home with a copy of your practice leaflet about online services.

The form must be countersigned by the person in charge of the home to confirm the member of staff's identity and that they are employed by the home.

The form must be returned to the surgery or sent via secure email once completed.

The surgery can also request to see identification to confirm the identity of people seeking proxy access following your established processes. This can be done virtually.

Please see [GP Practice Set up Instructions and Account Maintenance \(section 1\)](#) for instructions on how to set up care home staff member proxy access accounts in SystemOne.

The GP practice should complete the necessary sections on the form and save it in a secure folder within the practice's computer system for reference.

## Patient consent

Care home staff should explain to the resident (or their nominated representative) about how medication is ordered and how online access can improve this process.

### *Steps to set up proxy access for care home staff*

- Register care staff for online account
- Obtain patient consent
- Prepare records to allow easy ordering
- Link care staff to patient(s)
- Finalise process agreement with the home
- Set up electronic prescription service with nominated pharmacy (if applicable)
- Switch to online ordering

[The Patient Information Leaflet: Online order of medication](#) should be used to support this discussion and left with the person or their representative as appropriate.

Each resident that indicates to the care home that he/she would like the care home staff to manage the ordering of their medication online should be asked to complete section 1 of the [Consent to Proxy Access to GP Online Service: For Care Homes](#) form.

If the resident does not have capacity, section 1 can be filled in by a person with legal authority to act on behalf of the resident. For example, the person who has been granted Lasting Power of Attorney for Health and Welfare or has a Court Deputyship which is relevant to this issue.

Otherwise the person in charge of the care home or nominated deputy should complete the capacity assessment for this decision and fill in the second part of Section 1 including the opinions of representatives of the person who do not have legal authority to act on the person's behalf and the name of the representative. The GP practice will need to make a best interests decision on allowing proxy access for a resident without capacity.

Section 3 should be completed by the person in charge of the care home.

Once this form has been completed it must be returned to the practice or sent via secure email. The home should also keep a copy for their records.

Please see [GP Practice Set up Instructions and Account Maintenance \(section 3\)](#) for instructions on how to link the nominated staff to the patient's record.

The GP practice should complete the necessary sections on the form and attach a copy to the patient's record for reference.

## Preparing the records

Successful online ordering relies on the appropriate medication being available for ordering and it is vital to ensure that

- All medication that the patient needs routinely is included on the repeat medication order list.
- Any medication that is no longer required has been removed from the list.
- All quantities are aligned to the home's 28 day cycle wherever possible to make the ordering and repeat prescription process easier.
- Interim prescriptions are issued for suitable quantities to line up the medication so it can all be ordered at the same time if necessary.
- Where it is not possible to line up medication (e.g. medication is in a special container) ensure that the home can still order this with the rest of the medication. This means that blocks on ordering some medication may need to

be adjusted. For example, if an inhaler contains enough doses for 50 days, ensure the home can still order this with the regular order every 28 days. The home should carry forward any excess doses and periodically they will not order it as they have enough for the next cycle. If the home is prevented from doing this then they will need to place an interim order between their usual cycles. This adds to the workload of the practice and home and increases the risk of the medication running out.

- All changes to medication are reflected on the repeat medication list promptly.

## The Ordering Process

Complete the [Checklist and Process Information](#) form with the relevant information. Ideally this should be done with the care home to ensure the system can be agreed by both.

Copies should be kept by both the home and GP practice so that the repeat ordering process is clear.

Consider sending prescriptions for routine medicines directly to the nominated pharmacy via the electronic prescription service (EPS). The home does not need to see the paper prescriptions where online access is granted as they can check what has been issued and the directions directly with the online medication list.

## Changes to proxy access requirements

It is a requirement of proxy access that the home inform the surgery promptly of any changes required. The [Request for changes to proxy access](#) form should be used for this and sent via secure email or delivered to the surgery.

Where the member of staff leaves the employment of the home or access needs to be terminated for security reasons the care home must inform the surgery in writing within 1 working day.

If a resident moves from the home permanently the care home must inform the surgery within 1 working day so that proxy access for staff at the home can be removed.

Please see [GP Practice Set up Instructions and Account Maintenance \(section 4\)](#) for instructions on how to do this.

## Appendix 1: Request for online account for care home staff

Name of care home:	
Name of GP Practice:	

Care home staff members requiring proxy access should complete their details and sign to confirm that they understand their responsibility for safeguarding sensitive medical information and understand and agree with each of the following statements:

1.	I/we have read and understood the information leaflet provided by the practice and agree that I will treat the patient information as confidential
2.	I/we will be responsible for the security of the information that I/we see or download
3.	I/we will contact the practice as soon as possible if I/we suspect that the account has been accessed by someone without my/our agreement
4.	If I/we see information in the record that is not about the person, or is inaccurate, I/we will contact the practice as soon as possible. I will treat any information which is not about the person as being strictly confidential.

Surname:
First name:
Date of birth:
Online account already set up*: Yes <input type="checkbox"/> No <input type="checkbox"/>
Online account name*:
Signature:

\* Online account name must be one set up for you at the care home you work in. Personal online accounts must not be used.

### To be completed by the person in charge of the home

I confirm that the person requesting an account is a member of staff working at  
[insert name of care home]

I confirm that their job role involves managing medicines for the people for whom access is requested.

Signature:

Date:

Print name:

Job title:

**For care home:** please attach a list of people living at the care home for whom proxy access is being requested. This must only include people for whom proxy access has been agreed. For new people moving into the home please complete the [Consent to Proxy Access to GP Online Services](#) form

### For practice use only

Online account set up? Y/N	Date task completed:	By [initials]:
Date home informed:	By [initials]:	



## **Appendix 2: Patient Information Leaflet: Online Ordering of Medication**

### **A New Way To Order Your Medication**

Medication prescribed by your doctor can now be ordered online from your surgery. Staff at your care home may already order your medication for you. They do this by completing a paper “repeat request slip” that lists your medication. This then has to be taken to the surgery.

If you agree, the staff at your care home will be able to do this using a secure online system direct to the surgery. This makes it easier and safer for the staff at the home and the surgery.

### **What will staff be able to do?**

With online access authorised staff will be able to:

- ✓ View a list of your current repeat medication and easily select the ones that need ordering.
- ✓ Include a message with the request, if needed
- ✓ Track your order to make sure the medication you need is on its way.

### **Can staff see all my medical records?**

No – they can only see the medication you have been prescribed, when it was last ordered and any requests for medication they have made.

This is the same information that is on the paper repeat slip and on the records that the home keeps to support you with your medication safely.

### **How is it done?**

Staff ordering your medication will be given their own log in details with access to your repeat medication list.

This means that the surgery knows who has accessed your records.

When your medication needs to be ordered the member of staff will log into your account and order the medication through the computer. They will check after two working days to see what medication has been prescribed.

The prescription will be sent to your pharmacy for dispensing.



## **How do I know it is secure?**

Your care home is required to keep your information confidential. This means that they must keep their login details and password safe so nobody else can use it.

The surgery has the right to remove online access to services for anyone that doesn't use them responsibly and when it is no longer needed.

**If you think someone has accessed your record when they should not have – talk to your surgery. They can stop any further access.**

## **It's your choice**

If you decide not to allow online access or change your mind this is OK.

You can tell the care home or your surgery.

The surgery will not allow online access if you do not agree.

This decision will not affect the quality of your care.

## **What do I need to do next?**

Staff at your care home will talk to you about online ordering.

If you are happy for them to order your medication online they will ask you to sign a form.

The form is sent to your surgery so that the surgery know you have agreed.

If you find it difficult to make the decision a friend or relative can help make the decision.

## **Can I order online myself?**

Yes – if you order your own medication, let the care staff know that you want to order your medication online or contact the surgery directly. Online access can be arranged for you.

## Appendix 3: Consent to Proxy Access to GP Online Services: For Care Homes

Name of Care Home	
GP Practice:	

### Section 1: The Person's Details and Consent to Proxy Access

(This the person whose records are being accessed)

Surname:	Date of Birth:
First Name:	NHS number:
Care home Name and Address:	
Postcode:	
Telephone Number:	

I..... (Name of person), give permission to my GP practice to give proxy access to my records for the purpose of online ordering of medication (as indicated in section 2) to members of staff from ..... (Insert name of care home) who are authorised by the home to order my medication.

I confirm I have been given and understood the patient information leaflet that explains online ordering by the care home.

I understand I can change my decision at any time

I understand the risks of allowing someone else to have access to my health records.

Signature of person or LPA (delete as appropriate) ..... date:.....

Print name .....

**OR**

The person lacks capacity to make this decision and there is no person with legal authority to give consent on their behalf. Proxy access for online ordering of medication is requested for the staff from ..... (insert name of care home) in the person's best interest to ensure timely supply of medication.

Capacity assessed by Care Home Staff Member (Print and Sign):	Date:
Comments including any views expressed by representatives of the person.	

## Section 2: Online Access Requested

Online Prescription Management	<input type="checkbox"/>
--------------------------------	--------------------------

## Section 3: Care Home Staff Details:

Access is requested for the following staff members.

All staff members listed below must have been set up with an online account connected to the care home. For staff members who require online accounts approving by the GP practice use the [request for online account for care home staff](#) form.

Staff Name	Date of Birth	Online account name

**\*Online account name must be one set up for this care home. Personal online accounts must not be used.**

### To be completed by the person in charge of the home

I confirm that the people listed above are members of staff working at *[insert name of care home]*

I confirm that their job role involves managing medicines for the person to whose account access is being requested.

I confirm that the person to whose account proxy access is being requested is a resident at this care home.

Signature:

Date:

Print name:

Job title:

### For practice use only

The person's NHS number		The person's practice computer ID number	
Identity verified by (initials)	Date	Method of verification	Vouching <input type="checkbox"/> Vouching with information in record <input type="checkbox"/> Photo ID and proof of residence <input type="checkbox"/>
Proxy access authorised by			Date
Date account created:			

## Appendix 4: Checklist and Process Information

<b>Name of Care home</b>
<b>Name of GP practice</b>

Question	Details of arrangements where necessary	Please tick	
Data security		Care home	Practice
Have all staff who will access the person's record had training on information governance?			
Has the home completed the DSPT toolkit or working towards it?			
Is there a secure email address at the care home? What is it?	Email address:		
Is there a secure email address at the surgery the home can use for queries? What is it?	Email address:		
Procedure			
Is there a written protocol in the care home medication policy around ordering medication?			
Is there a written protocol in the GP practice medication policy around care homes ordering repeat medication?			
Have designated staff been identified at the care home?			

Question	Details of arrangements where necessary	Please tick	
Have the proxy consent forms been completed and returned to the practice?			
Has the practice agreed access for the designated staff and set up the online account/accounts?			
Is there a nominated contact for the care home at the practice for prescription issues? What are their names?			
Is there a nominated contact(s) at the care home for the practice to contact about prescription issues? What are their names?			
<b>Ordering</b>			
How will the care home request regular repeats?	<b>Online</b>		
How should the care home request interim prescriptions?			
How should the care home request urgent prescriptions?			
What is the process for ordering medication which has not yet been included on the repeat list?			
What action should the care home take when a request has not been accepted?			
What action will the GP practice take when they reject a request?			

Question	Details of arrangements where necessary	Please tick	
Are interim prescription issued to bring regular prescription items in line with the monthly cycle e.g. for newly prescribed items or when patients have been discharged from hospital? How should these be requested?			
<b>Process for issued prescriptions</b>			
What is the agreed procedure for monthly prescriptions?			
What is the agreed procedure for interim prescriptions?			
What is the agreed procedure for urgent prescriptions?			
Any other specific arrangements? (please detail below)			

Signature of care home representative	Print name	Date
Signature of practice representative	Print name	Date

## Appendix 5: Request for Changes to Proxy Access

The home is responsible for informing the GP practice of all changes which affect the proxy access required within 1 working day. Changes to proxy access requirements must be put in writing and sent to the GP practice for approval and action. The form can be sent via secure email. This form can only be used for residents and staff for whom proxy access for online ordering has already been agreed. For new residents use the [consent to proxy access](#) form and for staff who need online accounts use the [request for online account for care home staff](#) form.

Name of care home:	
Name of GP Practice:	

### To be completed by person in charge of the home/Clinical lead

Please tick	Reason for change	Change requested	Name(s) of Person/People	NHS number	Name(s) of staff	Online Account name
	Person has left the home	Please remove proxy access for all staff			All staff	All staff
	Member of staff is no longer employed at the home	Please delete the online account associated with this home for this staff member	All residents			
	Member of staff no longer needs online proxy access for their job role	Please delete the online account associated with this home for this staff member	All residents			
	Person has moved units within the home	Please remove online proxy access for the named person for the listed staff members				



Please tick	Reason for change	Change requested	Name(s) of Person/People	NHS number	Name(s) of staff	Online Account name
	Staff member has moved units	Please remove proxy access for the named staff to online ordering for the person/people listed.				
	Person or staff member <i>(delete as appropriate)</i> has moved units within the home	Please allow access for the named staff to online ordering for the person/people listed.				
	Other (please state)					

Signature:

Print name:

Job title:

Date:

**For care home: if more space is needed please attach details as required.**

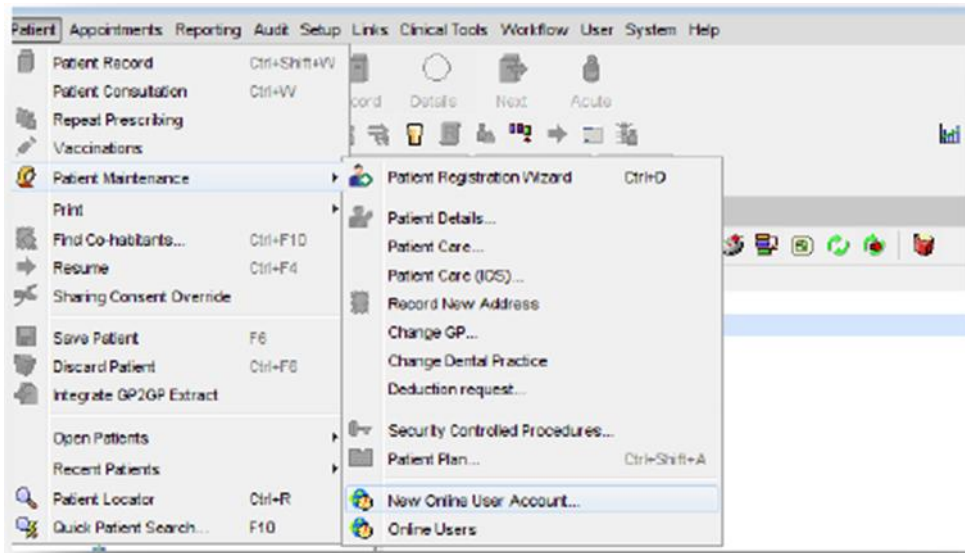
**For practice use only**

Task completed:	Date task completed:	By [initials]:
Date confirmation sent to home:	By [initials]:	

## Appendix 6: GP Practice Set up Instructions and Account Maintenance

### 1. Creating a new care home staff user:

- Log into SystemOne – Live
- Select Patient > Patient Maintenance > New Online User Account from the Main Menu



- The New Online User Account dialog is displayed: In the **Search** field type the **CareHomeName StaffMemberName** and Date of Birth. Adding the **CareHomeName** will ensure that the personal account for the staff member is not found on the spine.

 A screenshot of the 'New Online User Account' dialog box. The 'Search' field contains the text 'CareHomeName StaffName'. The 'Date of birth' field is set to 'On' and '01 Jan 1990'. The 'Gender' dropdown is set to 'Unspecified/Unknown'. There is a checkbox for 'Include test patients' which is currently unchecked. Below the search fields, there is a message: 'Enter search parameters and click \'Search\' Minimum search requirements are: 1) The patient\'s NHS Number or 2) First name then surname plus date of birth (or approximate age) and gender.' At the bottom of the dialog, there are three buttons: 'Create Account for Selection', 'Not Found', and 'Cancel'.

- Press **Enter** or click **Search**. If the staff member already has an online account created by another GP practice it will appear in the search results box. See [section 2](#) for set up instructions.

New Online User Account

Search:  Date of birth:

*First name then surname, or NHS number*

Gender:  ☐ Include test patients

Enter search parameters and click 'Search'  
Minimum search requirements are:  
1) The patient's NHS Number  
or  
2) First name then surname plus date of birth (or approximate age) and gender.

- Select **Not Found**. It is important that the **Not Found** option is always selected, as it is possible to find actual patients on the spine.

New Online User Account

Search:  Date of birth:

*First name then surname, or NHS number*

Gender:  ☐ Include test patients

P...	NHS Number	First Name	Middle Names	Surname	DOB	I...	House Name	House ...	Road	Postcode	Telephone
No patients found. Search again, or click on 'Not Found' to register a new patient.											

- Enter the following details:
  - CareHomeName: First Name field
  - StaffMemberName: Surname field
  - Date of birth
  - Contact Number (this should be the care home's contact number)

**New Online User Account**

Demographics

Changing patient demographics using this screen will change them for all SystmOne users and may update Spine.

NHS number:

Title:

First name:

Middle name(s):

Surname:

Gender:

Known as:

Date of birth:   ☐ Approximate

Contact

Home phone:

Mobile phone:

Addresses

From	Type	Address	Use For Searching	Use For Correspondence
No addresses recorded				

Ok Cancel

- Add the care home address, click  or **Alt+A** > select the type of address **Home** > enter **Postcode** > click **Find** > enter **Care Home Name** > click **Ok** > **check the information is correct** > click **Ok**.

**New Online User Account**

Demographics

Changing patient demographics using this screen will change them for all SystmOne users and may update Spine.

NHS number:

Title:

First name:

Middle name(s):

Surname:

Gender:

Known as:

Date of birth:   ☐ Approximate

Contact

Home phone:

Mobile phone:

Addresses

From	Type	Address	Use For Searching	Use For Correspondence
No addresses recorded				

Ok Cancel

**Address Type Selection**

Select the type of address to add

New Online User Account

Demographics

Changing patient demographics using this screen will change them for all SystmOne users and may update Spine.

NHS number

Title

First name CareHomeName

Middle name(s)

Surname StaffName

Gender Indeterminate

Known as

Date of birth 01 Jan 1990 00:00

Contact

Home phone CareHomeNumber

Mobile phone

Addresses

From Type Address Use For Searching Use For Correspondence

No addresses recorded

Ok Cancel

Address

House name

Road

Locality

Town

County

Postcode Find Map

Ok Cancel

New Online User Account

Demographics

Changing patient demographics using this screen will change them for all SystmOne users and may update Spine.

NHS number

Title

First name CareHomeName

Middle name(s)

Surname StaffName

Gender Indeterminate

Known as

Date of birth 01 Jan 1990 00:00 Approximate

Contact

Home phone CareHomeNumber

Mobile phone

Addresses

From Type Address Use For Searching Use For Correspondence

No addresses recorded

Ok Cancel

New Online User Account

Demographics

Changing patient demographics using this screen will change them for all SystmOne users and may update Spine.

NHS number

Title

First name CareHomeName

Middle name(s)

Surname StaffName

Gender Indeterminate

Known as

Date of birth 01 Jan 1990 00:00 Approximate

Contact

Home phone CareHomeNumber

Mobile phone

Addresses

From Type Address Use For Searching Use For Correspondence

25 Sep 2019 Home CareHomeName, 1 Grimbold Crag Court, Knaresborough North Yorkshire HG... [X] [X]

Ok Cancel

- Enter the Identity Verification details:

**Identity Verification**

Minimum requirements: 1 document(s) or vouching by 1 staff member(s)

☐ Documents provided

☒ Vouched for

Vouched for by:

Type of vouching: ☐ Personal ☐ Information confirmation

Add comments:

**Contact Details**

Record Contact Details

Email:

Mobile:

**Online Credentials**

SystmOnline Username and Password

Username:

Give username by: ☒ Printout ☐ SMS ☐ Email ☐ Verbally

Give password by: ☒ Printout ☐ SMS ☐ Email ☐ Verbally

Third Party (HSCIC Approved) Apps

Account ID:

Give account ID by: ☒ Printout ☐ SMS ☐ Email ☐ Verbally

Give third party passphrase by: ☒ Printout ☐ SMS ☐ Email ☐ Verbally

Printout: ☒ Print all details on one page ☐ Print details on separate pages

Printer Settings

**Proxy Access**

Allow this Online User to Access a Patient's Account

- The system will automatically create a username and password. This can be given to the staff member by printout or sent by email. Ensure the **Online Credentials** are set to:
  - Give username by: Printout
  - Give password by: Printout
  - Printout: Print all details on one page
- Change the username to the staff member's initials and 6 digit date of birth (for example SM010190).

**Online Credentials**

SystmOnline Username and Password

Username:

Give username by: ☒ Printout ☐ SMS ☐ Email ☐ Verbally

Give password by: ☒ Printout ☐ SMS ☐ Email ☐ Verbally

Third Party (HSCIC Approved) Apps

Account ID:

Give account ID by: ☒ Printout ☐ SMS ☐ Email ☐ Verbally

Give third party passphrase by: ☒ Printout ☐ SMS ☐ Email ☐ Verbally

Printout: ☒ Print all details on one page ☐ Print details on separate pages

Printer Settings

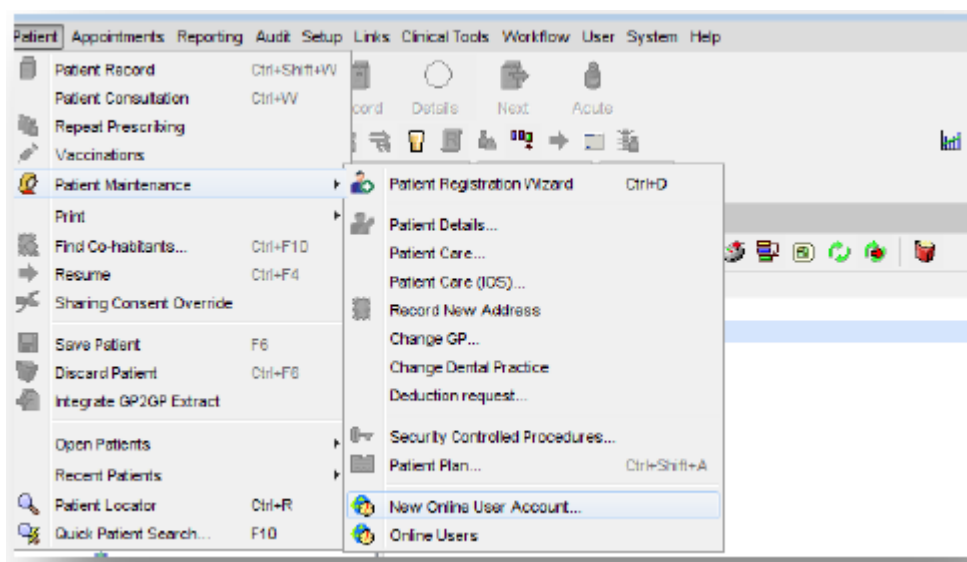
**Proxy Access**

Allow this Online User to Access a Patient's Account

- See [section 3](#) for directions on how to allow this online user access to a patient's account.

## 2. Staff member online account set up by another GP Practice

- Log into SystmOne – Live
- Select Patient > Patient Maintenance > New Online User Account from the Main Menu



- The New Online User Account dialog is displayed: In the **Search** field type the **CareHomeName StaffMemberName** and Date of Birth. Adding the **CareHomeName** will ensure that the personal account for the staff member is not found on the spine.

A screenshot of the 'New Online User Account' dialog box. The 'Search' field contains the text 'CareHomeName StaffName'. The 'Date of birth' field is set to 'On' and '01 Jan 1990'. Below the search field, there is a note: 'First name then surname, or NHS number'. The 'Gender' dropdown is set to 'Unspecified/Unknown' and there is a checkbox for 'Include test patients'. At the bottom of the dialog, there are three buttons: 'Create Account for Selection', 'Not Found', and 'Cancel'. The main area of the dialog is empty, with a message: 'Enter search parameters and click \'Search\''. Below this message, it lists the minimum search requirements: '1) The patient's NHS Number' or '2) First name then surname plus date of birth (or approximate age) and gender.'



- Press **Enter** or click **Search**

New Online User Account

Search: Carehome Staffname Date of birth: Approx. Age 20 years Search

First name then surname, or NHS number

Gender: Unspecified/Unknown Include test patients

P...	NHS Number	First Name	Middle Names	Surname	DOB	I...	House Name	House ...	Road	Postcode	Telephone
		CareHomeN		StaffName	01 Jan 1990	I	CareHomeN...1		Grimbald Crag Court	HG5 8QB	

1 Patient

Create Account for Selection Not Found Cancel

- The staff member's online account will show up in the search results box. Select **the account** and click **Create Account for Selection**.
- Ensure the following details are correct:
  - CareHomeName: First Name field
  - StaffMemberName: Surname field
  - Date of birth
  - Contact Number (this should be the care home's contact number)
- Click **Ok** to continue if correct. If information provided on the new proxy access form is different to the information recorded on SystmOne, contact the staff member at the care home to confirm the correct details.

New Online User Account

Demographics

Changing patient demographics using this screen will change them for all SystmOne users and may update Spine.

NHS number

Title

First name: CareHomeName

Middle name(s)

Surname: StaffName

Gender: Indeterminate

Known as

Date of birth: 01 Jan 1990 00:00 Approximate

Contact

Home phone

Mobile phone

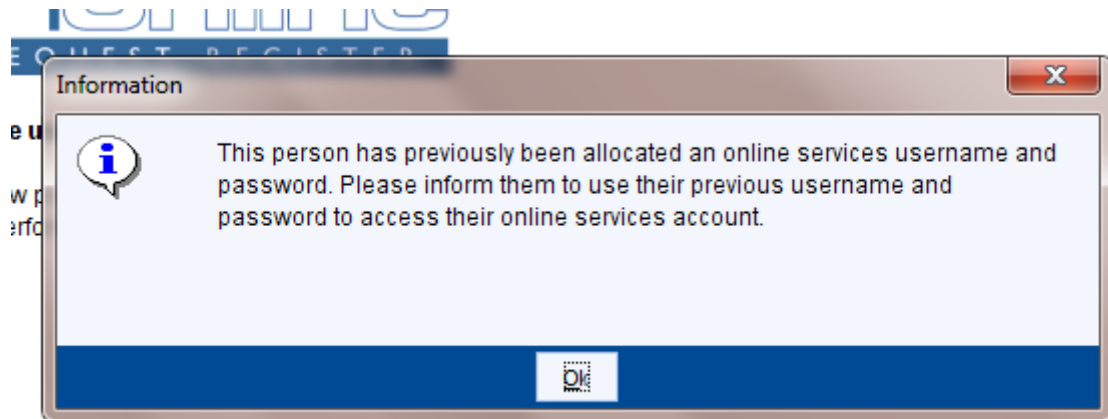
Addresses

From	Type	Address	Use For Searching	Use For Correspondence
25 Sep 2019	Home	CareHomeName, 1 Grimbald Crag Court, Knaresborough North Yorkshire HG...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Ok Cancel

- Enter the **Identity Verification** details. Record a note in the comments box stating verification was completed by set up GP practice.

- The care home staff member will previously been allocated an online services username and password. Please inform them to use their previous username and password to access their online services account.



- [See section 3: Adding current care home patients](#) for directions on how to allow this online user to access a patient's account.

### 3. Adding current care home patients

- Now add the current patients at the care home (from completed proxy access forms) to the Online User Account just created by clicking **Allow this Online User to Access a Patient's Account**

- Search for the patient you want to add (Please note: Jane Grumpy is a test patient)

The screenshot shows a 'Patients' search window. The 'Name search' field contains 'Jane Grumpy'. Below the search bar is a table with patient details. The first row is highlighted in blue and contains the following information:

NHS Number	First Name	Middle Names	Surname	DOB	Sex	House Name	House ...	Road	Postcode	Telephone
	Jane		Grumpy	06 Aug 1929	F					

- Complete the sections:
  - **Services** you wish to give the care home staff member access to. We recommend only allowing access to **Medication Requesting**.
  - **Relationship to patient:** Care Provider
  - **Basis for granting access:** e.g. **patient Consent (written)** > patient has signed the proxy access form themselves, **Patient lacks capacity – patients best interest** > record in the **Add comments** box the name of any patient representative consulted if applicable, **Patient lacks capacity – power of attorney** > if the form has been signed by a person with legal authority to act on the person's behalf in matters of health and welfare, add the name of the person signing the form to the **Add comments** box.

The screenshot shows the 'Services (Mrs. Jane Grumpy)' form. It contains several sections with checkboxes and radio buttons for selecting services and access basis.

**Services (Mrs. Jane Grumpy)**

☐ Allow appointment booking ☒ Allow medication requesting

☐ Allow completing questionnaires\*

☐ Allow viewing summary record

☐ Allow coded or full record ☐ Detailed coded record ☐ Full clinical record

\* indicates that the service isn't currently offered here

**Relationship to patient**

Access end date

Preferred contact method

☐ Use alternative contact details

**Basis for granting access**

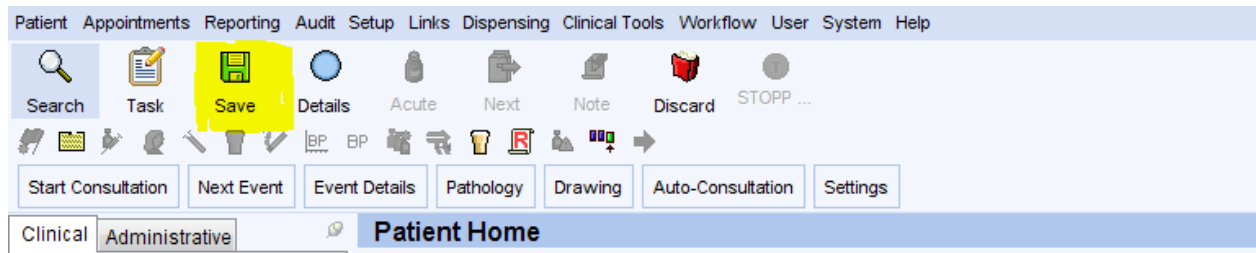
☐ Patient consent (verbal) ☐ Patient lacks capacity - court order

☐ Patient consent (written) ☐ Patient lacks capacity - power of attorney

☐ Parental responsibility ☐ Patient lacks capacity - patient's best interests

**Proxy Access**

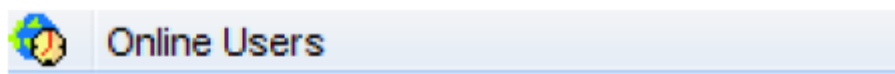
- To add another patient, select: **Allow this Online User to Access a Patient's Account**. Continue to do this until all residents from the care home have been added to the Online User Account.
- Once completed, select **Ok** at the top of the registration screen and **save** the online user record (as you would a patient record).



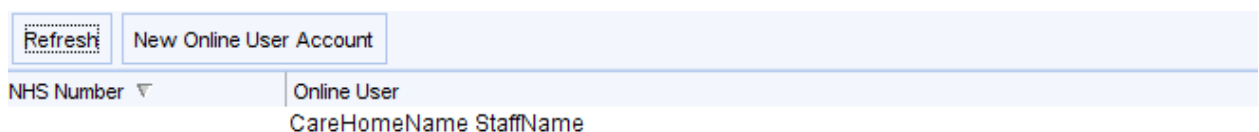
**Please note: GP practices will only be able to see patients added from their GP practice ONLY.**

#### 4. Online Proxy User Maintenance

- Select Patient > Patient Maintenance > Online Users



- Find the care home staff member's Online User Account. It is useful to filter by NHS number so that all care home staff members Online User Account appear at the top as they have no NHS number assigned to their account.



- Select care home staff members Online User Account and Retrieve Record**
- Click **Administrative > Online Services**
  - Reset password/Change username** – will reset the care home staff member's password or change their username. **Please note:** this can only be done by the GP practice that originally set the online user account up
  - Allow access to another patient's account** – choose this option and follow the set up steps above at [section 3](#) to add patient. This option will be required when there are new residents to the care home. Ensure you have a

completed [Consent to Proxy Access to GP Online Services: For Care Homes](#) form for the patient before setting up online access.

- **Close account** – will revoke the care home staff members Online User Account. The care home must inform the GP practice in writing when care home staff leave or are no longer involved in the ordering of medication, so that their access to the patient's records can be removed.
- **Remove Access** – will remove access to individual patient's accounts. This should be used if a patient changes or leaves the care home.

The screenshot shows the 'Online Services' page in SystmOnline. The left sidebar contains a navigation menu with options like Patient Details, GP Registration Details, Care History, Address History, Name Details, Appointments, Visits & Tasks, SMS Messages, Amendments, LAs/CCGs (2), Schools, Misc. Flags, Groups & Relationships, Hospital Numbers, Prescription History, A&E and Out of Hours Access, Sharing Consent Overrides, Deleted Items, Identify Verification (1), and Online Services (selected). The main content area displays the 'Online Services' section for 'Mrs. Jane Grumpy'. It includes account status (Active), registration details (Registered for online services at Dr Moss & Partners: 25 Sep 2019 14:21 by Stacey Stanton), and a detailed list of services with their access status. The services listed are: Appointment booking (Not granted), Request medication (Available), Questionnaires (Not enabled), Summary record access (Not granted), Detailed coded record access (Not granted), and Full clinical record access (Not granted). At the bottom of the list, there are buttons for 'View Contact Details', 'Amend Service Access', and 'Remove Access'.