

TPP SystemOne user guide | GP practices to set up a new proxy user

Before you start

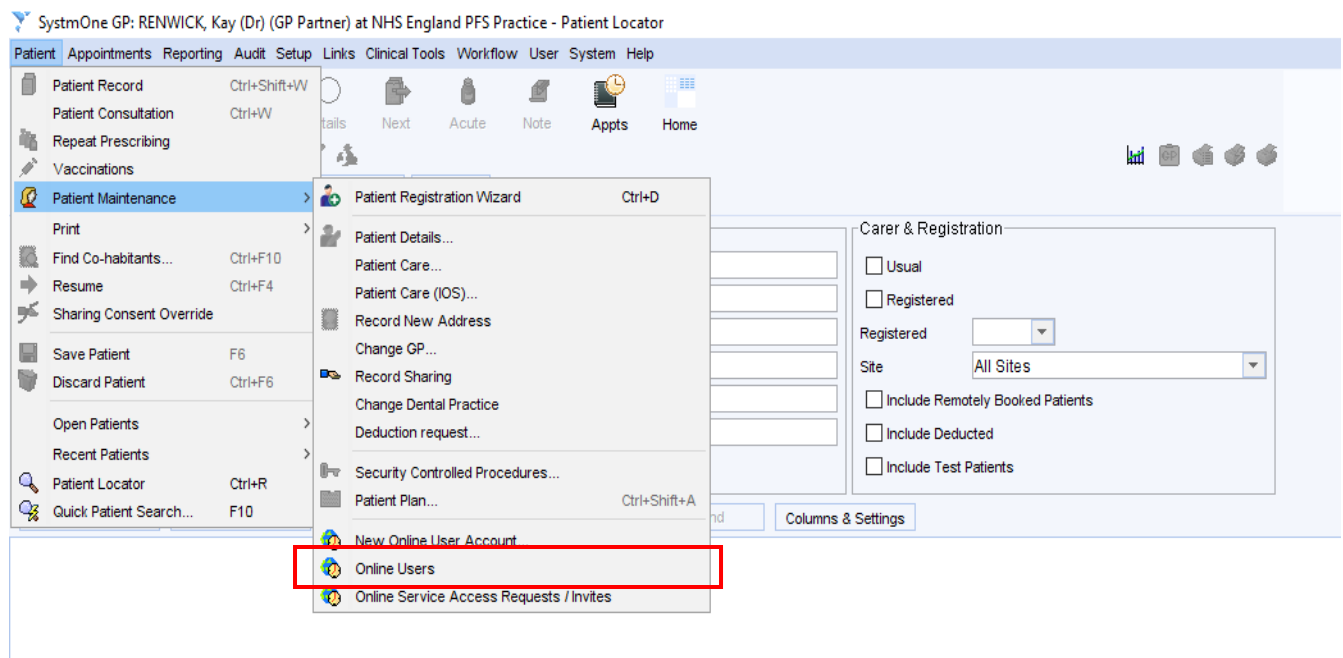
- Have an up to date resident list/report available
- Before starting the setup, scan and save all staff and resident authorisation forms

Setting up a new proxy account

Step 1

- select **Patient Maintenance**
- then select **New online user account.**

This information will come from the application form that the care home has submitted to the practice and it should be scanned and saved in the practice governance folder on the shared drive.



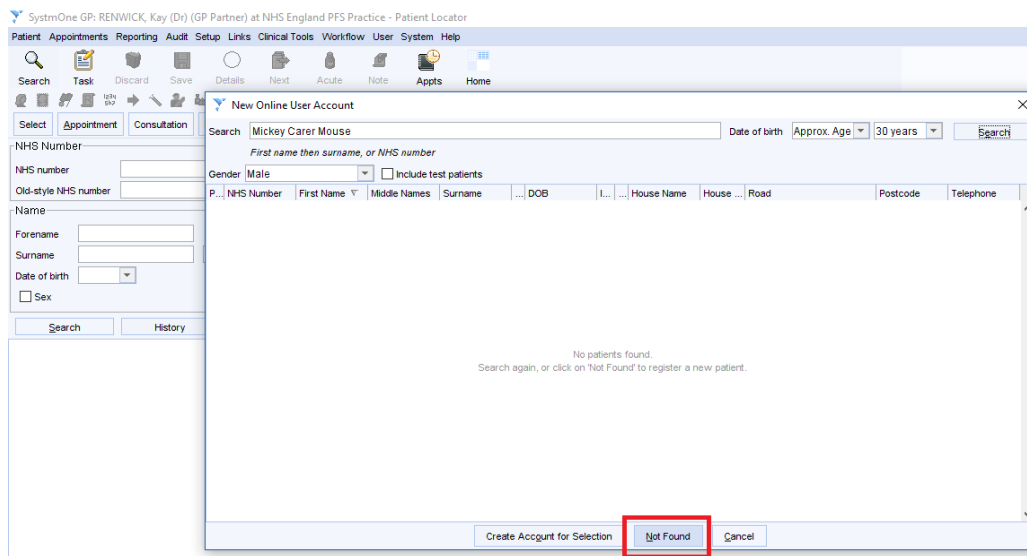
Step 2 | locate staff or create new user

- search by entering the care home staff's name.

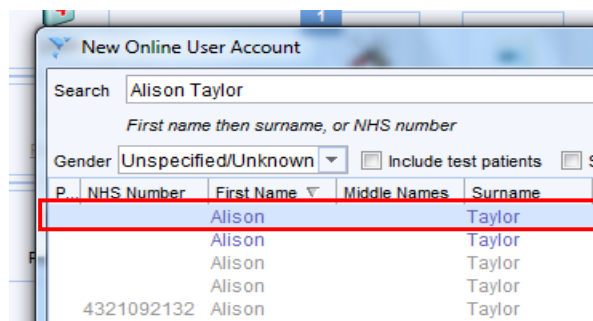
There are three possible options that may be returned:

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.

1. You cannot find their name. Select **Not Found**
2. You find the person's name, but the record includes an NHS number. You need to create a new user and **without an NHS number**, select **Not Found**

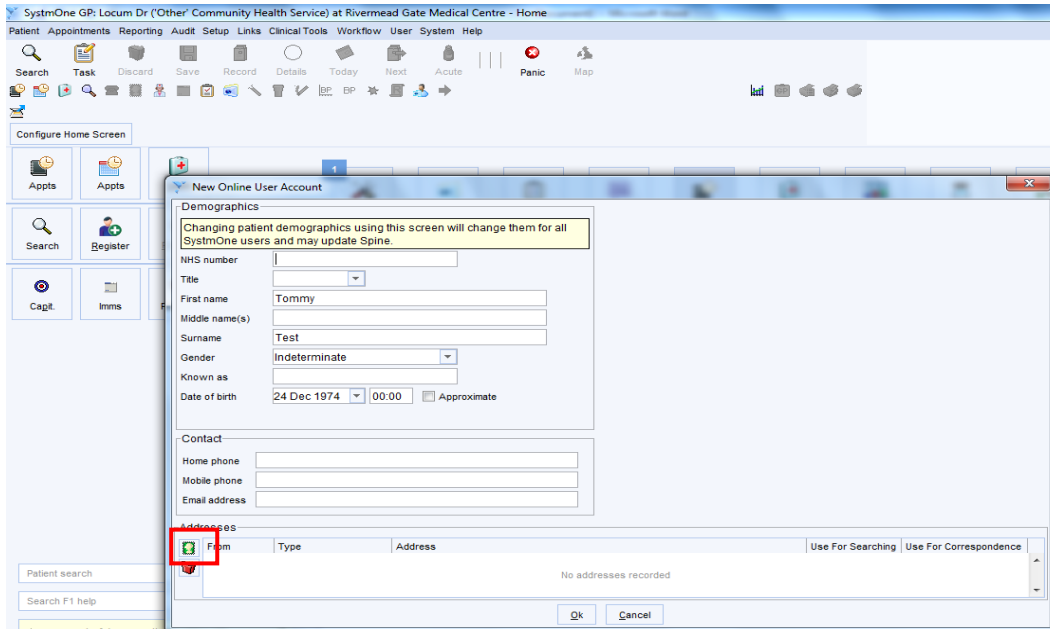


3. You find the name and without an NHS number. It's possible that the member of staff has been set up as a proxy in another TPP practice. Check you have the right person. **Select their name without the NHS number.**



Step 3 | complete demographics

- complete the demographic details, without an NHS number, ensuring a secure email address is completed and verified.
- click the green button (as shown below) to start adding the care home address for this proxy user.



- Select **Home** as the type of address to add.

- Enter the care home address and select **OK**.

Step 4 | complete user set-up

- **ID verification:** tick *document provided*; select **Other** and type in *'proxy form completed'*
- **Contact details:** select the **green telephone**. Record contact details and complete (as shown below) with secure email address and a work mobile phone number (where provided).

- **Verify the details:** ensure email is ticked as the method of receiving log in details. This means that if they forget their password, they can reset themselves online with ‘forgot my password’ on the log-in page
- **Online Credentials:** select **Email**. Use care home staff secure email address for verification details; and select **Email** for online credentials settings
- **Select Allow the online user to access a patient’s account** from the bottom left of the screen (see below)

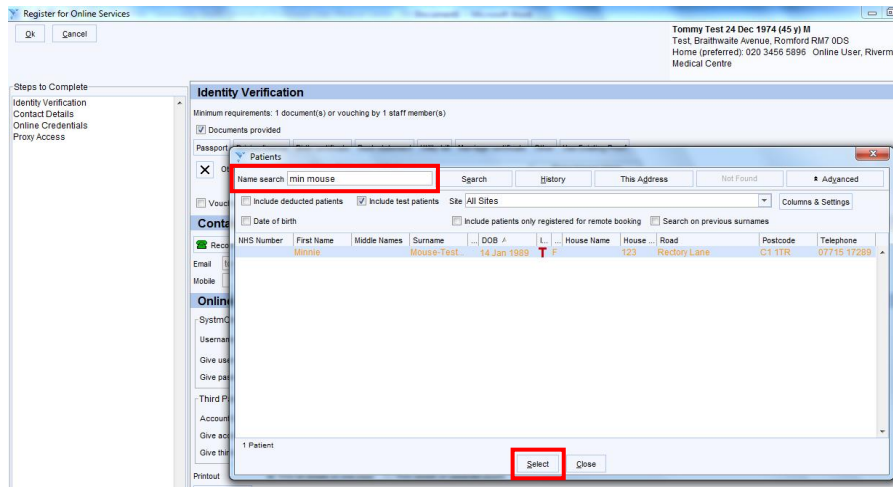
The screenshot shows the 'Register for Online Services' form for a patient named Tommy Test. The form is divided into several sections: Identity Verification, Contact Details, Online Credentials, and Proxy Access. A 'Telephone Numbers & Email' dialog box is open over the form, showing contact preferences for various numbers and email addresses. Red boxes highlight the following elements:

- Identity Verification:** 'Documents provided' checkbox, 'Other' dropdown menu, and 'proxy form completed' text.
- Contact Details:** 'Record Contact Details' button.
- Online Credentials:** 'Email' radio button selected for both 'Give username by' and 'Give password by'.
- Proxy Access:** 'Allow this Online User to Access a Patient's Account' checkbox.
- Telephone Numbers & Email Dialog:** 'Preferred contact method' dropdown set to 'Email', 'Email' field with 'tommytest@nhs.net', and 'Email addresses are not valid Skype IDs' warning.

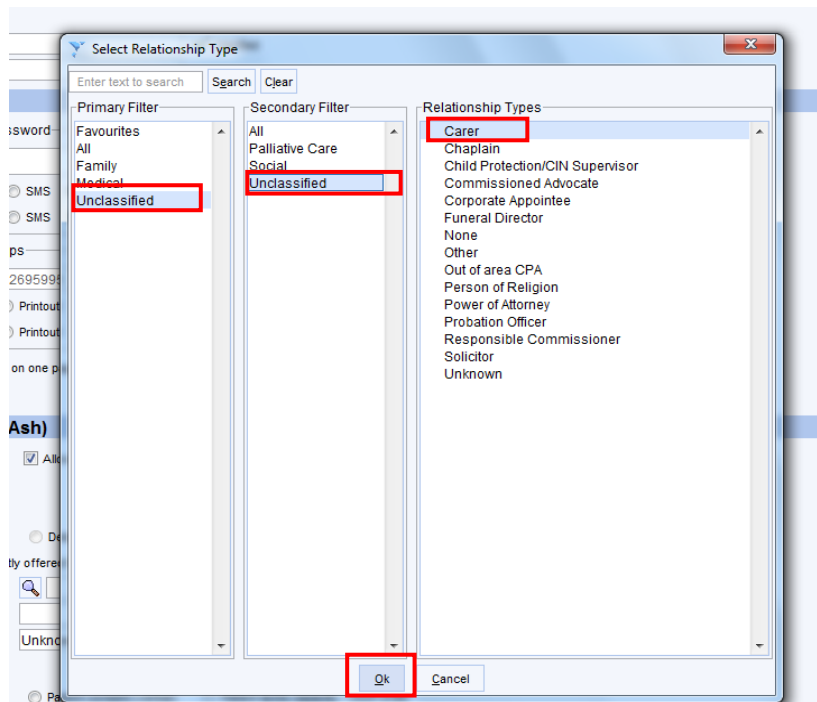
Step 5 | link the proxy to a patient’s record

- Type in the name of the patient in the **Name search** box.

- **Select** the patient you are looking for.



- In the Select Relationship Type box,
- select *Unclassified*, then *Unclassified* and then *Carer*.
- Select *OK*.



- In the Register Online Services screen, select *Allow medication requesting*; Relationship to patient is *Carer* and select one of the options from Basis for granting access. Click OK.

- In the screen that appears next, select **Don't inform**

Step 6 | check the proxy set up

The next screenshot shows what services the proxy has access to for the selected patient. In our example, the care home worker has been given access to requesting medication only. This is also where access is removed if the care home worker or patient leaves the care home.

The screenshot displays the SystemOne GP interface for a patient record. The 'Save' button in the top toolbar is highlighted. In the 'Administrative' sidebar, 'Online Services' is highlighted. In the main content area, the 'Allow access to another patient's account' button is highlighted. Below, a table shows access permissions for Mrs Madge M Ash.

This online user has access to the accounts and services listed below:		
Mrs Madge M Ash		
Date started: 26 Feb 2020 16:33		
Entered by: Locum Dr		
Relationship Type: Carer		
Consent: Patient Consented - Written		
Appointment booking	✘	Not granted
Request medication	✔	Granted
Questionnaires	✘	Not granted
Summary record access	✘	Not granted
Detailed coded record access	✘	Not granted
Full clinical record access	✘	Not granted

Step 7 | link the proxy to other patients' records, if required

See the screenshot above. **Select *Allow access to another patient's record*** and search for the patient. Repeat as above to add to the proxy user.

Click Save after you have added all the patients.

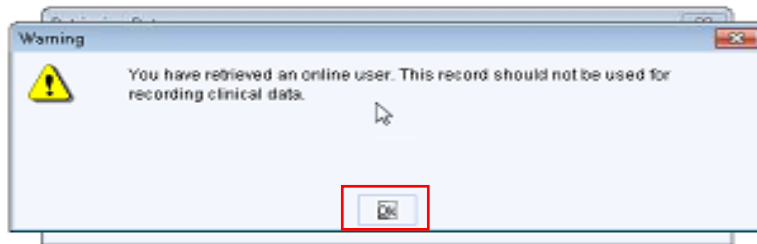
Adding new residents to a proxy's account

Once the online user has been set up, an email is sent to the proxy with login details.

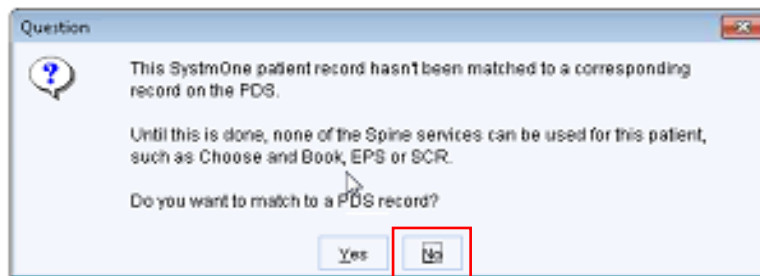
Once they have logged on and completed the registration process by setting up new password, they can start ordering medication.

To add patients to a proxy's account after the user has been set up (once only), you will need to go back to Step 1 above. When you retrieve a user's record, you can change their password and access rights here, too.

The following warning may also appear. If it does, **select OK**



- When entering the record of the proxy (online user) the following question may display. If it does, **select No**



If a proxy user moves from the care home, locks themselves out of their account, and cannot reset it themselves, the account must be re-set by the practice that created them as a proxy user in SystemOne in the first place.