

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**

Online user trace

Select an existing online user.

Trace criteria

* Family name * Given name * Gender Find

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

OK Cancel

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.

Step 2 | staff already registered at the GP 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

Online user trace

Select an existing online user.

Trace criteria

Family name: mouse Given name: mickey Gender: Male Find

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

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

OK Cancel

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

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:

Online user (1) Local patients (3)

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

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

Link Cancel

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

Online user

Details

Online user: MOUSE, Mickey

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

Back Next OK Cancel

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

Online user

ID Verification

Online user: MOUSE, Mickey

Verifications

Add a new identity document for this online user.

+ Add... Edit... Delete

Method	Additional information	Document Type	Date

Back Next OK Cancel

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

Online user: MOUSE, Mickey

Linked patient

Patient: XXTESTPATIENT-TKHA, Donotuse (Mr)

* Relationship to patient: [Dropdown]

Services

- ☒ Appointments Requested
- ☒ Repeat prescriptions Requested
- ☐ Messaging
- ☒ 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

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

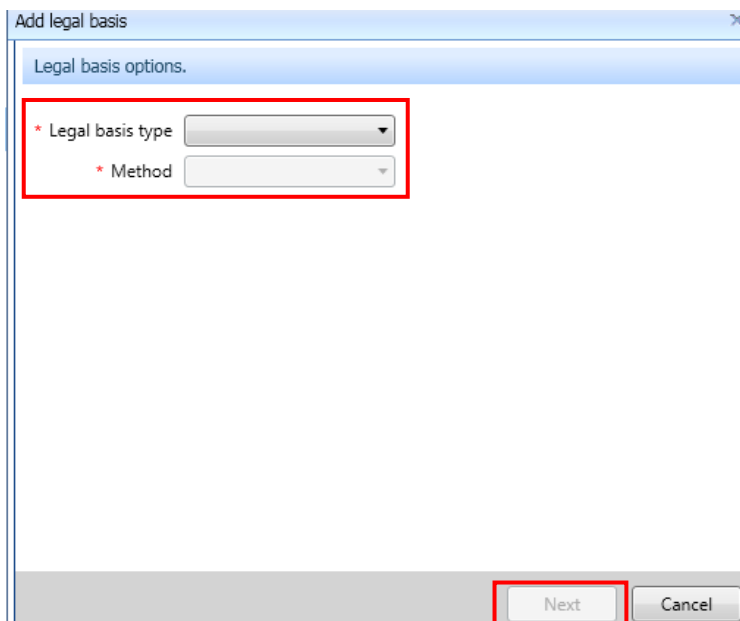
Update legal basis... [What is legal basis?](#)

Previously added legal basis

Legal basis type	Method	Additional information	Date
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Back Next OK Cancel

- 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 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	
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.



Active

XXTESTPATIENT-TKHA, Donotuse (Mr)

Born

21-Jan-1947 (72y)

Gender

Male

EMIS No.

506489

OS

PROXY

PDS

Usual GP

TEE, Mike (Dr)

1. Demographics

2. Additional


3. Online Services


4. Family / Relationship Links




5. Status History

6. Audit History

7. GP2GP

 Add online user...

 Unlink user

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

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.

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

Online user (1)

Local patients (3)

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

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

Link

Cancel

Removing a care home worker as a proxy

When a member of care home staff is leaving, search for the online user.

Find online user

Select an existing online user.

Trace criteria

Family name: Taylor Given name: Alison Gender: Female Date of birth: Enter a date Postcode: Account ID: Find

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

OK Cancel

- Click on User's name and Select

Find online user

Select an existing online user.

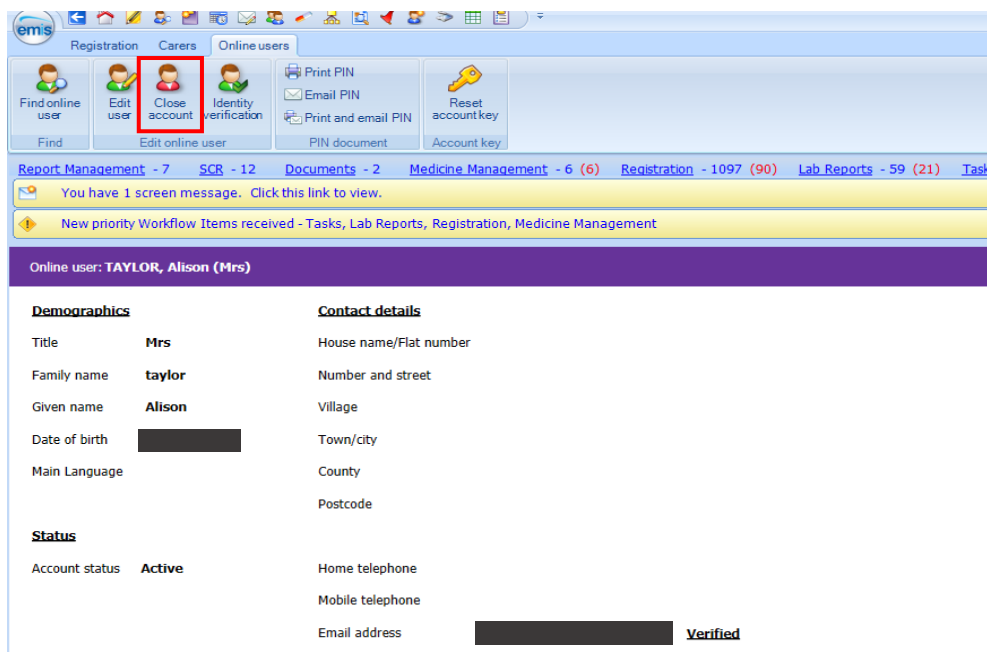
Trace criteria

Family name: Taylor Given name: Alison Gender: Female Date of birth: Enter a date Postcode: Account ID: Find

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

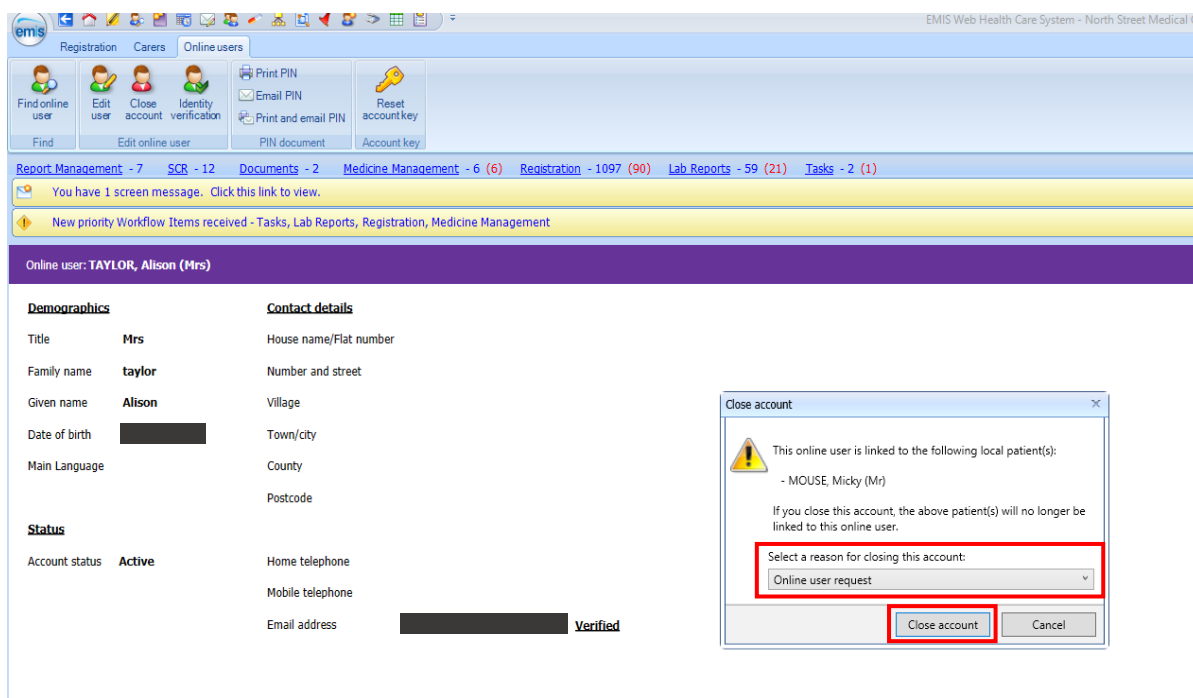
Select Cancel

- Click on Close account



- Select a reason for closing this account, 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 is active, displaying a list of users. The user 'TAYLOR, Alison (Mrs)' is selected. The 'Close account' dialog box is open, showing 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.

Select a reason for closing this account:
Online user request

The 'Close account' button is highlighted with a red box.