



Microtest 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

Step 1 | Turn on medication ordering

Before you can set up proxy access, you must have turned on medication ordering at a practice, patient, and proxy level in the main system.

• Click practice

Online Patient Services •			📥 devsys	🛔 Dr D Disorderly 🔻	
		A No patient has b	been selected		
Online Users	👻 Onlir	ne Patient Services			
Register Online User	+ Opling	Patient Services allows you to re	gister and mar	and Users for Online Pa	tiont Sonvices, add and manage
Edit Online User		s each Online User can administe			
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Edit Online User (Test) Edit Online User (Alex Test)	Patient Service Action	s each Online User can administe s. 15 Register Online User Register a User to use Online			

• **Medication** must be on with (a green background).





• You can choose to allow access to repeat and/or acute medication.

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A No patient has been selected			4
ෆ් Practice Services			
Appointments			*
booking cancellation viewing.			
Maximum number of future appointments a ROSU can make on behalf of a patient.			
Medication			
Options Repeats or Acutes or both (for drug ordering)			
Please indicate which are to be made available Repeats Acutes			
Core Summary Care Record			

Step 2 | Medication set-up

The agreement you have with the care home and the pharmacy will dictate how you set up repeat medication ordering on your system.

Prescriptions			
Settings for prescritions.			
Working days to raise a prescription			
Working days until prescription is available 1 Early reorder warning number of days 14	Click system configuration]	
		Save Cha	nges

Step 3 | Registration of patients and proxies

Logon Details







The Online Patient Services module runs in a web-based system called Infinitorium. Evolution needs to be running. If it isn't, start Evolution and log in. Infinitorium is loaded by double clicking on its icon on the desktop.

Infinitorium gets your logon details from Evolution and starts immediately.

			Server name	Your login	
Solution → Infinitorium Infinitorium → Home →	and in	A No patient has been sele	- D 2 10.198.166	94 Log Off	
# Home	Billing Platform	CC A Test	Dashboard	Debug	
	Online Patient Services	Online Patient Services (QA)	Reports	User Admin	

- Choose **Online Patient Services** from the menu by clicking on the "Screen" icon.
- Select Register Online User.

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	-	A No	o patient has been selected			
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Edit Online User			ws you to register and manage an administer using Online Ser			-
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Edit Online User (Alex Test)	Action	-				
		15				
Edit Online User (Alex Test2)	< <	Register Online				
Patient		Register a User t	o use Onune			
		Services				
Patient	ප ප	Services				
Patient Practice		Services				





• Select Register non-Patient Online User, and then Next.

Infinitorium	
Online Patient Services	A devsys A Dr D Disorderly - MICROTEST Mostar
No./ Name 423 - Mr Trevor Whit Address Round House, Top Ro OOB 07-Dec-1979 - 35 year	oad, Hallsend, Launces)ton, Cornwall, PL1 1EX
Online Users	Register Online User
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	Register non-Patient Online User
dit Online User (Alex Test)	Keyister höh-Fauent Ohine Öser
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Patient Services	<u>ە</u>
ractice	
Practice Services	<u>ە</u>
system Configuration	00
Communication Template Manager [
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	<< Prev Next >>





• Fill in the proxy's name, address, phone number and email address. Click **Save Online User.**

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Online Patient Services •			C	a devsys	🛔 Dr D Disorderly 👻		
No./ Name 423 - Mr Trevor Whitehea Address Round House, Top Road, DOB 07-Dec-1979 - 35 years	ad Hallsend, Launces}ton, Cornwall, PL1	NHS No 415 153 1238 1EX					•
Online Users 😁	Demographics Identity Patients	Activation					
Register Online User 🔸							
Edit Online User 🛛 📽	Online User Demograph						
Edit Online User (Test)	Check the Patient details below. If a	any changes are required, please update	the Patient reco	rd from withi	n Evolution.		
Edit Online User (Alex Test)	Title	Mr					
Edit Online User (Alex Test2)	Surname	Whitehead					
Patient 🐣	Forenames	Trevor					
Patient Services 😃	Date of Birth	07-Dec-1979					
Practice 🔤							
Practice Services 😃	Personal Email Address	clevertrevor.whitehead@hotmail.co.uk	~				
System Configuration	or, Work Email Address				Sommunioo	tion	
Communication Template Manager	of, work Email Address	trevor.whitehead@microtest.co.uk		1	Communicat		
Report III				/ d	etails adde	d	
	Home Phone	015662909234	_/				
	Mobile Phone	0779956784532	< ▲				
<	House Name/No	Round House					
	-	Top Road					
		Hallsend					
		Launces}ton					
		Cornwall					
	Postcode						
	Clear Form					🗸 Save O	nline User

In the Identity tab, add the ID verification method.

• Select Add Personal Vouch

>> Infinitorium		
Online Patient Services •		- S & devsys & Dr D Disorderly - MICFOTEST Mask
No./ Name 423 - Mr Trevor Wr Address Round House, Top DOB 07-Dec-1979 - 35 y	Road, I	d NHS No 415 153 1238 Hallsend, Launcesjton, Cornwall, PL1 1EX
Online Users	*	Name Mr Trevor Whitehead Phone Home: 015662909234 Mobile: 0779956784532 Email Personal: clevertrevor.whitehead@hotmail.co.uk
Register Online User	+	Address House, Road, Local, Town, County Mobile: 0779956784532 Work: trevor.whitehead@microtest.co.uk
Edit Online User	ß	Demographics Identity P tients Activation
Edit Online User (Test)	ß	
Edit Online User (Alex Test)	ß	🚍 Identity Verification
Edit Online User (Alex Test2)	ß	ROSU Identity Verification Records
Patient	4	
Patient Services	Ç	No Identity Verifcation Records found for this Online User
Practice	÷	
Practice Services	Ċ	+ Add Verification Document + Add Personal Vouch
System Configuration	O [®]	
Communication Template Manager		
Report		





• In additional information, type in Care home verified consent form or something similar.

Dr Duncan Disorder	у	•		Dr Duncan Disorderly	
Vouched By Dr Duncan Disorder Ms Rachael Richard: Dr Peter Hannon DR Martin Taylor				Additional information	
Save Record		× Cancel	Save Record		×c

• Upload the consent forms signed by the care home lead. Click **Save Record**.

Verification Do	cument	8
	🖙 Choose File	Document type
11 4	Dr Duncan Disorde	Passport
	Additional informati	Birth Certificate
		Driving Licence
✓ Save Record		Utility Bill
		Marriage Certificate
		Bank Statement

Step 4 | Link to proxy to patients

• in the Patients tab, click Associated Patients, then Associate New Patient

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Online Patient Services •					C -	a devsys	🛔 Dr D Disorderly 🔻	
No./ Name 423 - Mr Trevor Wi Address Round House, Top DOB 07-Dec-1979 - 35 y	Road, H	allsend, Launces}ton, Cornwall	NHS № 415 , PL1 1EX	153 1238				
Online Users	*	Name Mr Trevor W Address House, Road		hone Home: 015662 Mobile: 07799			Personal: clevertrevor.wh Work: trevor.whitehead@	
Register Online User	+	Address House, Road	, Local, Town, County	Wobile: 07799	30/04332		work: trevor.whiteheadig	princrotest.co.uk
Edit On <mark>lin</mark> e User	8	Demographics Identity Pat	tients Activation					
Edit Online User (Test)	8	Mar ta teat						
Edit Online User (Alex Test)	Ø	Associated Patients						
Edit Online User (Alex Test2)	8	Below is a <mark>list of t</mark> he patients o	urrently associated with this	Online User.				Associate
Patient	4							New Patient
Patient Services	Ċ	Pending Associations						
Practice	=	Surname	Forenames		Date of	Birth	Address	
Practice Services	Ċ	A Whitehead	Trevor	07-Dec-1	979			🕼 Edit 🙂 Services 📼
System Configuration	¢°							
Communication Template Manager								
Report								





- Search on the name of the patient to link with the proxy. Make sure you have selected the correct patient.
- Then complete the **Relationship Details** section.
- Click Save Relationship.

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Online Patient Services •	-E O Ac devsys 🕹 Dr D Disorderly 👻 MICFOLD	
No./ Name 423 - Mr Trevor Wh Address Round House, Top I DOB 07-Dec-1979 - 35 yr	Road, Hallsend, Launces)ton, Cornwall, PL1 1EX	۲. ۲. ۲.
Online Users Register Online User Edit Online User Edit Online User (Test)	Water Marrevor Whitehead Phone Home: 015662909234 Email Personal: clevertrevor.whitehead@hotmail Work: House, Road, Local, Town, County Mobile: 0779956784532 Email Work: trevor.whitehead@microtest.co.uk Demographics Identity Patients Activation Vork: trevor.whitehead@microtest.co.uk	co.uk
Edit Online User (Alex Test)	C Associate Patient	
Edit Online User (Alex Test2)	Patient Details No./Name 423 - Mr Trevor Whitehead NHS No 415 153 1238	
Patient	No./Name 423 - Mr Trevor Whitehead NHS No 415 153 1238 Address Round House Top Road Hallsend Launces}ton Cornwall PL1 1EX	
Patient Services Practice	DOR 07 Doc 1979 35 years	
Practice Services	کے O Relationship Details	
System Configuration	📽 Relationship Self 🔚 of Patient	Save
Communication Template Manager	Legal Basis Consent - Verbal	Relationship
Report	Details	
	< Status Pending	
	♦ Identity	ate Online User





Step 5 | Activate the online user

- Select the Activation tab.
- Check the proxy's details then click **Send**.

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Online Patient Services •		🔩 devsys 🔒	Dr D Disorderly			
No./ Name 423 - Mr Trevor Whitehead NH5 No 415 153 1238 Address Round House, Top Road, Hallsend, Launceston, Cornwall, PL1 1EX DOB 07-Dec-1979 - 35 years						
Online Users 😁	Name Mr Trevor Whitehead Phone Home: 015662909234 Email Personal: clevertrevor.whitehead@hotmail.co.uk Address House, Road, Local, Town, County Mobile: 0779956784532 Work: trevor.whitehead@microtest.co.uk					
Register Online User +						
Edit Online User 🕼 Edit Online User (Test)	Demographics Identity Patients Activation					
Edit Online User (Alex Test)	Method of Communication Account ID Linkage Key ODS Code Send Separ				nd Separately	
Edit Online User (Alex Test?)	@Email (2)					
Patient 🔺	clevertrevor.whitehead@hotmail.co.uk Not verified - Send verification email	~	~	~	~	
Patient Services 🙂 Practice	trevor.whitehead@microtest.co.uk Not verified - Send verification email	~	~	~	~	
Practice Services 😃	Phone (2)					
System Configuration	 ✓ 015662909234 home 					
Communication Template Manager						
Report III	× 0779956784532 mobile	 Image: A start of the start of	~	 ✓ 	 Image: A set of the set of the	
	SMS (1)					
	X 0779956784532 Not verified - Send verification sms		~	Image: A start of the start		
<	Post (2)					
	 House, Road, Local, Town, County, Previous 	Image: A start of the start	 Image: A set of the set of the	Image: A start of the start	 Image: A set of the set of the	
	Round House, Top Road, Hallsend, Launces)ton, Cornwall, PL1 1EX, Home	<	 Image: A start of the start of	 Image: A start of the start of	Image: A start of the start	
	In Person (1)					
	 Select codes you would like to display then click A Send 	Image: A start of the start	 Image: A set of the set of the		 ✓ 	
	← Associate Patients				\land Send	





Step 6 | Verification message

ROSU Activation Codes
⊠ Post
Trevor Whitehead
Round House, Top Road, Hallsend, Launces}ton, Cornwall, PL1 1EX, Home
Account ID :
WHITE712079TR-62171
Linkage Key :
1D7B09DFAC4494F88C57EF88E817C6D2
ODS Code :
B81055
🖨 Print 🛛 🖪 Cancel

The verification message option sends an email to the address given and requests some confirmation information such as date of birth from the online user. It sends an account ID, a linkage key and an ODS (organisation) code.

The verification process checks the email has been received and actioned, and that the user supplied information is correct.

The proxy can then start to order medication.