



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

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• **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
 Infinitorium <i>#</i> Home ▼ 	-	▲ No patient has been select		Log Off
# Home				
Home	Billing Platform	C A Test	Dashboard	A Debug
Demo	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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System Configuration	00		
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• Select Register non-Patient Online User, and then Next.

Infinitorium		
Online Patient Services		A devsys A devsys A Dr D Disorderly MICCOLEST Model Model
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• Fill in the proxy's name, address, phone number and email address. Click **Save Online User.**

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In the Identity tab, add the ID verification method.

• Select Add Personal Vouch

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Register Online User	+	Address House, Road, Local, Town, County Mobile: 07/9950704552 Work: thevor.whitehead@microtest.co.uk
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Edit Online User (Test)	ß	
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Edit Online User (Alex Test2)	ß	ROSU Identity Verification Records
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Patient Services	Ģ	O No Identity Verifcation Records found for this Online User
Practice	÷	
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• In additional information, type in Care home verified consent form or something similar.

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	Vouched By			
	Dr Duncan Disorderly		Additional information	
	Ms Rachael Richards			
	Dr Peter Hannon			
	DR Martin Taylor			
Save Record		🗙 Cancel	Save Record	🗶 Ca

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

Verification Document							
	🖙 Choose File	Document type					
1 4	Dr Duncan Disorde	Passport					
	Additional informati	Birth Certificate					
	<u></u>	Driving Licence					
✓ Save Record		Utility Bill cel					
	-	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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Edit Online User	8	Demographics Identity Patient	Activation				
Edit Online User (Test)	Ø	Manual And Ballinste					
Edit Online User (Alex Test)	7	Transformation and the second					
Edit Online User (Alex Test2)	Ø	Below is a list of the patients curre	ently associated with this Online U	ser.			Associate
Patient							New Patient
Patient Services	C	Pending Associations					
Practice	=	Surname	Forenames	Date of	Birth	Address	
Practice Services	Ċ	& Whitehead	Trevor	07-Dec-1979			🕼 Edit 😃 Services 👻
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- 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	
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Practice	DOB 07 Doc 1979 35 years	
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System Configuration	📽 Relationship Self 📰 of Patient	Save
Communication Template Manager		Relationship
Report	Details	
	< Status Pending	
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Step 5 | Activate the online user

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

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	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				🚀 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.