

## Microtest user guide | GP practices to set up a new proxy user

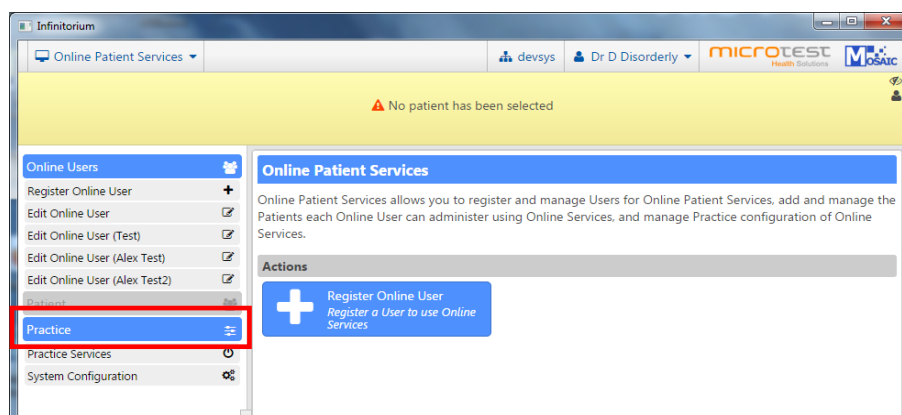
### Before you start

- 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**



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

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

The screenshot shows the 'Practice Services' configuration page. A yellow banner at the top states 'No patient has been selected'. The 'Practice Services' section includes 'Appointments' and 'Medication'. The 'Medication' section has a toggle switch that is turned on. Below the toggle, it says 'Options Repeats or Acutes or both (for drug ordering)' and 'Please indicate which are to be made available'. There are two checkboxes: 'Repeats' and 'Acutes', both of which are checked. Below this is the 'Core Summary Care Record' section.

## 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.

The screenshot shows the 'Prescriptions' settings page. It includes fields for 'Working days to raise a prescription' (set to 1), 'Working days until prescription is available' (set to 1), and 'Early reorder warning number of days' (set to 14). A red box highlights the 'Working days until prescription is available' field, with an arrow pointing to it from a text box that says 'Click system configuration'. A 'Save Changes' button is located at the bottom right.

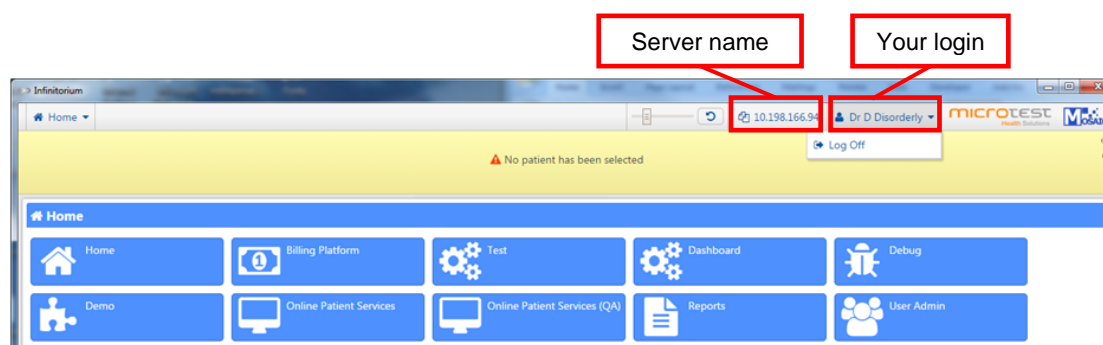
## Step 3 | Registration of patients and proxies

### Logon Details

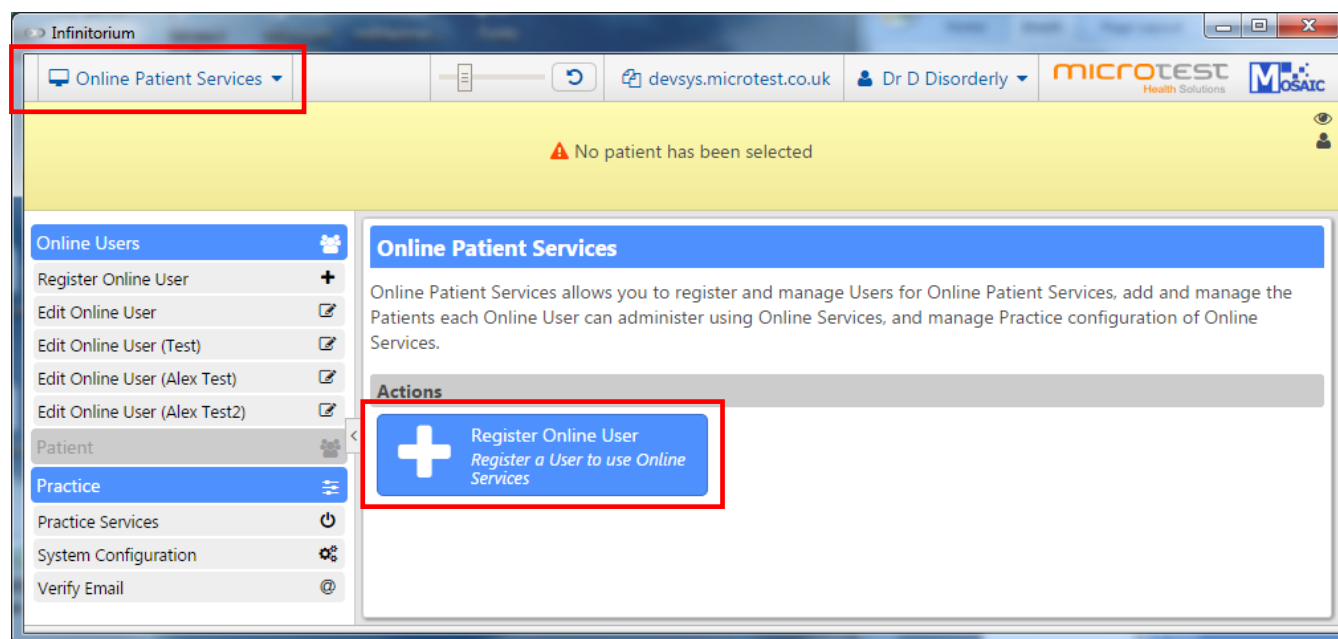


The Online Patient Services module runs in a web-based system called Infinitorium. Evolution needs to be running. If it isn't, start Evolution and log in. Infinitorium is loaded by double clicking on its icon on the desktop.

Infinitorium gets your logon details from Evolution and starts immediately.



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



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

The screenshot shows the 'Infinitorium' application window. At the top, there's a header with 'Online Patient Services' and user information for 'Dr D Disorderly'. Below this, patient details for 'Mr Trevor Whitehead' are displayed, including his NHS number (415 153 1238), address, and date of birth. The main area is titled 'Register Online User' and contains two radio button options. The first option, 'Register loaded Patient as an Online User', is currently selected. The second option, 'Register non-Patient Online User', is highlighted with a red rectangular box. At the bottom right of the form, there is a 'Next >>' button, also highlighted with a red rectangular box. A left sidebar contains various navigation links like 'Online Users', 'Patient', 'Practice', etc.

included in population reporting or generate a 'price per patient' payment to the practice.

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

Infinitorium

Online Patient Services

No./ Name 423 - Mr Trevor Whitehead NHS No 415 153 1238

Address Round House, Top Road, Hallsend, Launceston, Cornwall, PL1 1EX

DOB 07-Dec-1979 - 35 years

Online Users

Register Online User +

Edit Online User ✓

Edit Online User (Test) ✓

Edit Online User (Alex Test) ✓

Edit Online User (Alex Test2) ✓

Patient

Patient Services

Practice

Practice Services

System Configuration

Communication Template Manager

Report

Demographics Identity Patients Activation

Online User Demographics

Check the Patient details below. If any changes are required, please update the Patient record from within Evolution.

Title Mr

Surname Whitehead

Forenames Trevor

Date of Birth 07-Dec-1979

Personal Email Address clevertrevor.whitehead@hotmail.co.uk ✓

or, Work Email Address trevor.whitehead@microtest.co.uk ✓

Home Phone 015662909234

Mobile Phone 0779956784532 ✓

House Name/No Round House

Street Top Road

Locality Hallsend

Post Town Launceston

County Cornwall

Postcode PL1 1EX

Clear Form

Save Online User

Communication details added

In the Identity tab, add the ID verification method.

- Select **Add Personal Vouch**

Infinitorium

Online Patient Services

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Online Users

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Edit Online User ✓

Edit Online User (Test) ✓

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Patient

Patient Services

Practice

Practice Services

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Demographics Identity Patients Activation

Identity Verification

ROSU Identity Verification Records

No Identity Verification Records found for this Online User

Add Verification Document Add Personal Vouch

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

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

## Step 4 | Link to proxy to patients

- in the **Patients** tab, click **Associated Patients**, then **Associate New Patient**

Surname	Forenames	Date of Birth	Address	
Whitehead	Trevor	07-Dec-1979		<a href="#">Edit</a> <a href="#">Services</a>

- **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**.

The screenshot shows the Infitorium software interface. The top navigation bar includes 'Online Patient Services', 'devsys', 'Dr D Disorderly', 'microTEST', and 'MOSAIC'. The main content area displays patient information for 'Mr Trevor Whitehead' (NHS No: 415 153 1238). The 'Associate Patient' form is open, showing 'Patient Details' and 'Relationship Details'. The 'Relationship Details' section is highlighted with a red box. The 'Save Relationship' button is also highlighted with a red box.

**Online Users**

- Register Online User
- Edit Online User
- Edit Online User (Test)
- Edit Online User (Alex Test)
- Edit Online User (Alex Test2)
- Patient**
- Patient Services
- Practice**
- Practice Services
- System Configuration
- Communication Template Manager
- Report

**ONLINE USER**

**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

**Demographics** **Identity** **Patients** **Activation**

**Associate Patient**

**Patient Details**

**No./Name** 423 - Mr Trevor Whitehead **NHS No** 415 153 1238  
**Address** Round House Top Road Hallsend Launceston Cornwall PL1 1EX  
**DOB** 07-Dec-1979 - 35 years

**Relationship Details**

Relationship Self of Patient  
 Legal Basis Consent - Verbal  
 Details  
 Status Pending

**Save Relationship**

**Identity** **Activate Online User**

## Step 5 | Activate the online user

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

Infinitorium

Online Patient Services

No./ Name 423 - Mr Trevor Whitehead NHS No 415 153 1238

Address Round House, Top Road, Hallsend, Launceston, Cornwall, PL1 1EX

DOB 07-Dec-1979 - 35 years

Online Users

Register Online User

Edit Online User

Edit Online User (Test)

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Patient

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ONLINE USER

Name Mr Trevor Whitehead

Address House, Road, Local, Town, County

Phone Home: 015662909234 Mobile: 0779956784532

Email Personal: clevertrevor.whitehead@hotmail.co.uk Work: trevor.whitehead@microtest.co.uk

Demographics Identity Patients **Activation**

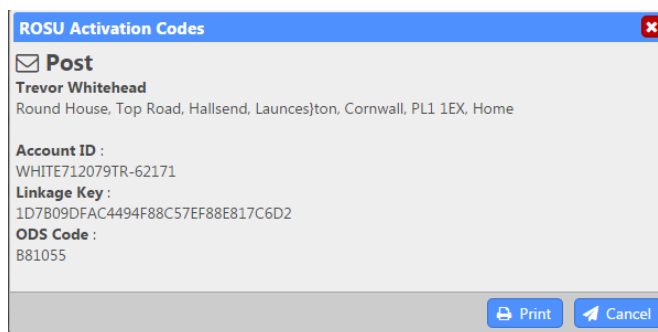
Method of Communication	Account ID	Linkage Key	ODS Code	Send Separately
<b>Email (2)</b>				
✗ clevertrevor.whitehead@hotmail.co.uk Not verified - Send verification email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
✗ trevor.whitehead@microtest.co.uk Not verified - Send verification email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Phone (2)</b>				
✓ 015662909234 home	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
✗ 0779956784532 mobile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>SMS (1)</b>				
✗ 0779956784532 Not verified - Send verification sms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Post (2)</b>				
✓ House, Road, Local, Town, County, Previous	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
✓ Round House, Top Road, Hallsend, Launceston, Cornwall, PL1 1EX, Home	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>In Person (1)</b>				
✓ Select codes you would like to display then click  Send	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Associate Patients

**Send**



## Step 6 | Verification message



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.