EMIS Web user guide for GP practices | Setting up proxy access for care staff authorised to access residents' GP online records

Before you start

- Have an up-to-date resident list/report available

- Scan and save all staff and resident authorisation forms

NOTE: If you have already set up authorised care staff as proxy users for ordering medication, go to **Search.**

Select the online user already set up in the system and add additional access via the **Access** screen from step **2e**.

Complete the **Relationship to patient** field by ticking/unticking the services not needed by the proxy user.

Update **Legal basis**.

Consent must be given by the patient/resident (or their representative) before further access to the GP record is set up for care staff. There must also be an agreement between the care home and GP practice for this.

Setting up a new proxy user account for authorised care staff
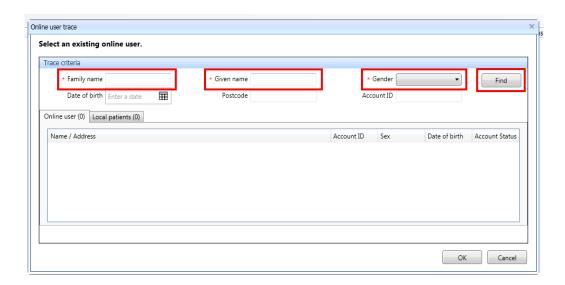
Step 1 | setup the proxy

- 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**
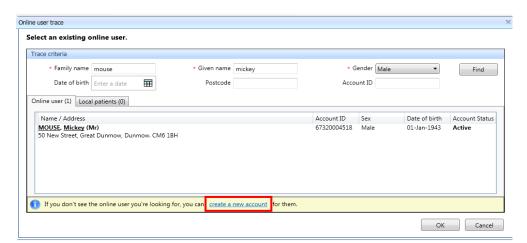

> Proxy users must be set up **without** an **NHS number.** This is to make sure that the authorised care staff are not added as a new patient at the GP practice so that they are not included in population reporting or generate a 'price per patient' payment to the practice.

Step 2 | staff already registered as patients at a GP practice

If the proxy user is a registered patient **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.**
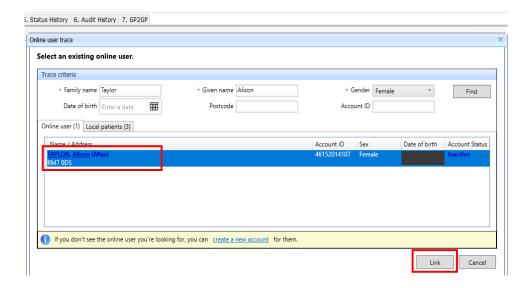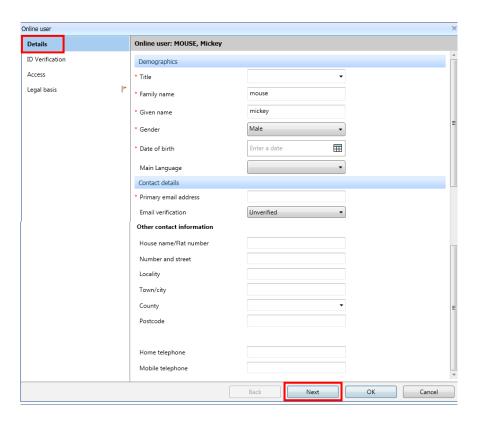
a) Click **create a new account**

b) You will need to select the account, without an NHS number, to link to care home residents' accounts
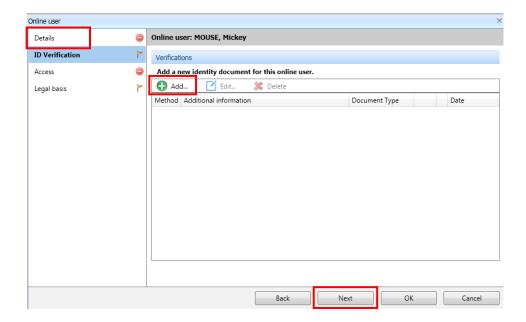

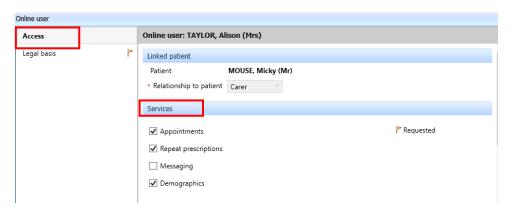c) In **Details**, fill in demographics fields. You must verify the email address**.** Then click **Next**

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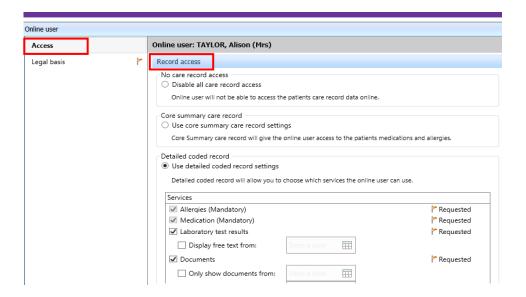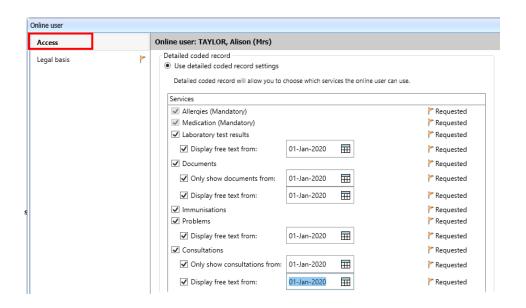

e) In the **Access** screen, complete the **Relationship to patient** field. Then tick/untick the **Services** and levels of **Records access** agreed for the authorised proxy user. Click **OK**
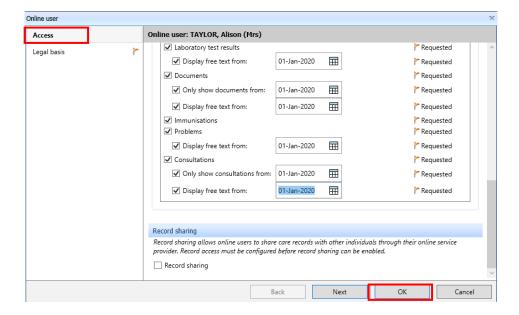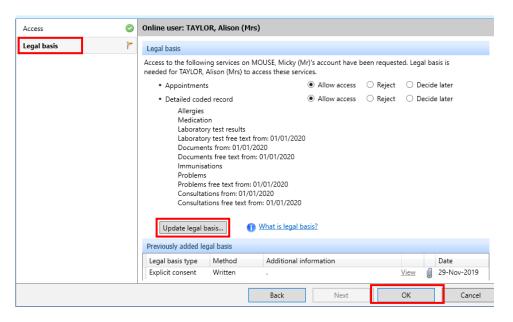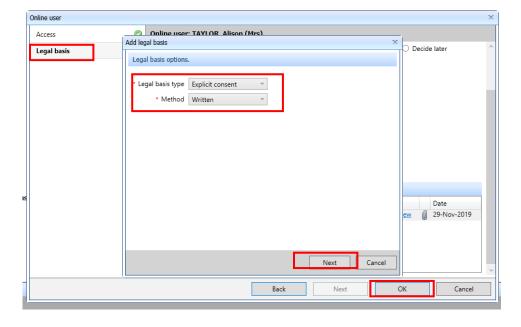
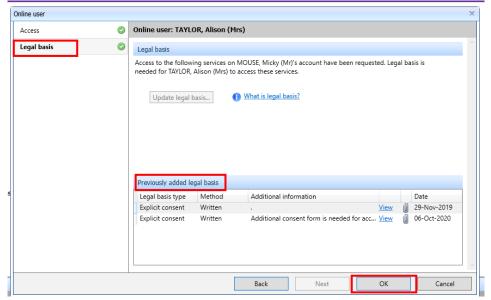f) Click **Legal basis** screen, then click **Update legal basis**. Click **OK**

g) 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 **OK/Next/Save as per on screen instructions**

h) Click **Save**

i) If **Legal basis** appears again, click **Not now**, then **OK**

Step 3 | Issue PIN document

Issue PIN documents by selecting **Email PIN** via the 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 accessing the information in the GP record by proxy once they have activated their account. This can be viewed under **Account status** in the online user screen.
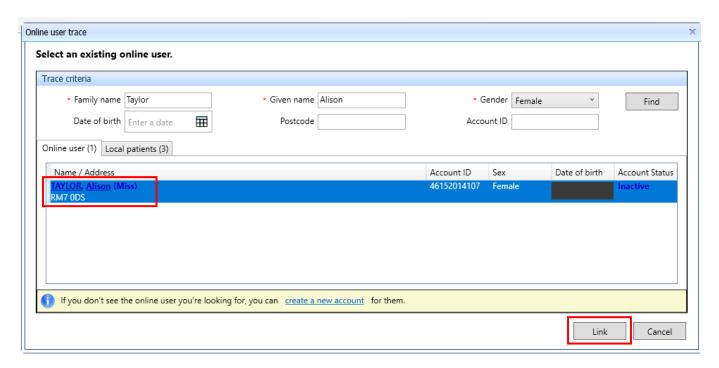
Step 5 | repeat for each patient

Repeat the above steps for each patient the proxy user 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.
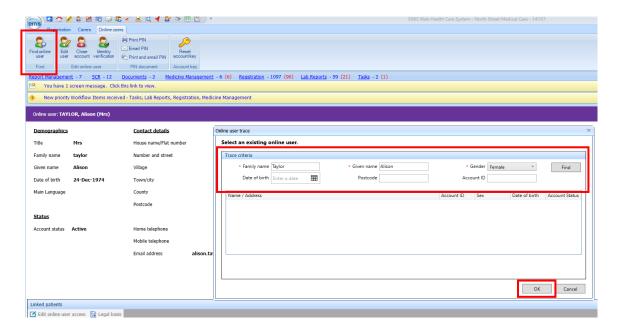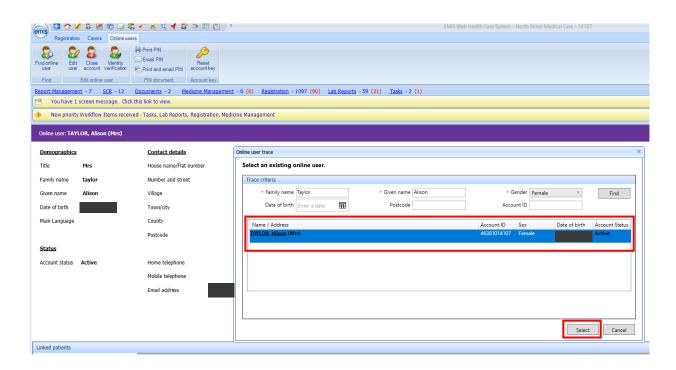
Search for online user - removing an authorised care staff proxy

When authorised care home staff leave or to update access, search for the user.
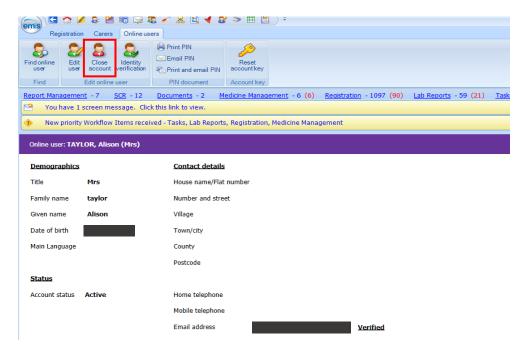

- Click on user's name and **Select**

- Click on **Close account**

- Select a reason for closing this account, as appropriate

- Click **Close account**