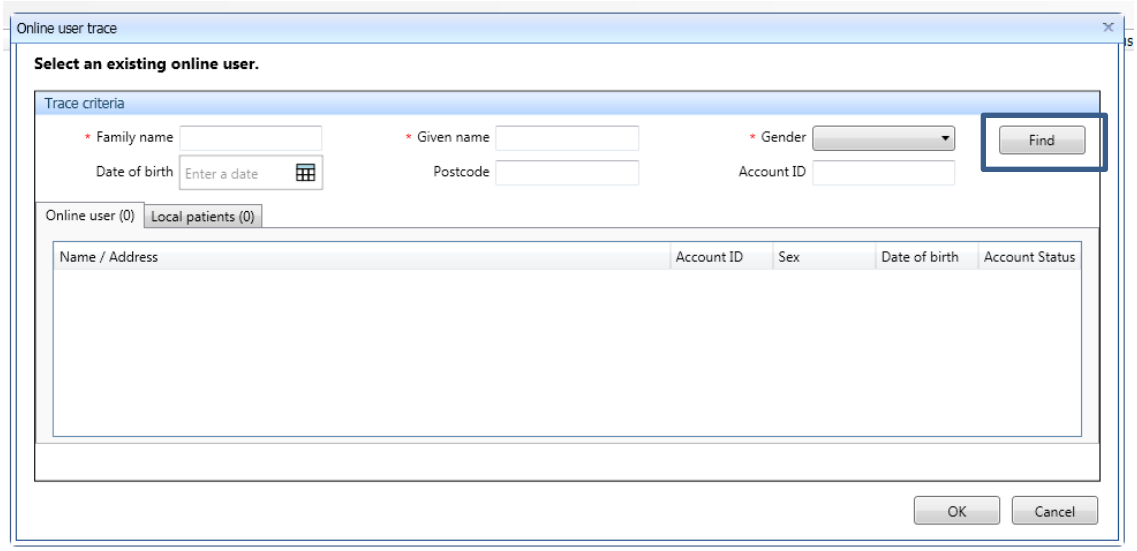
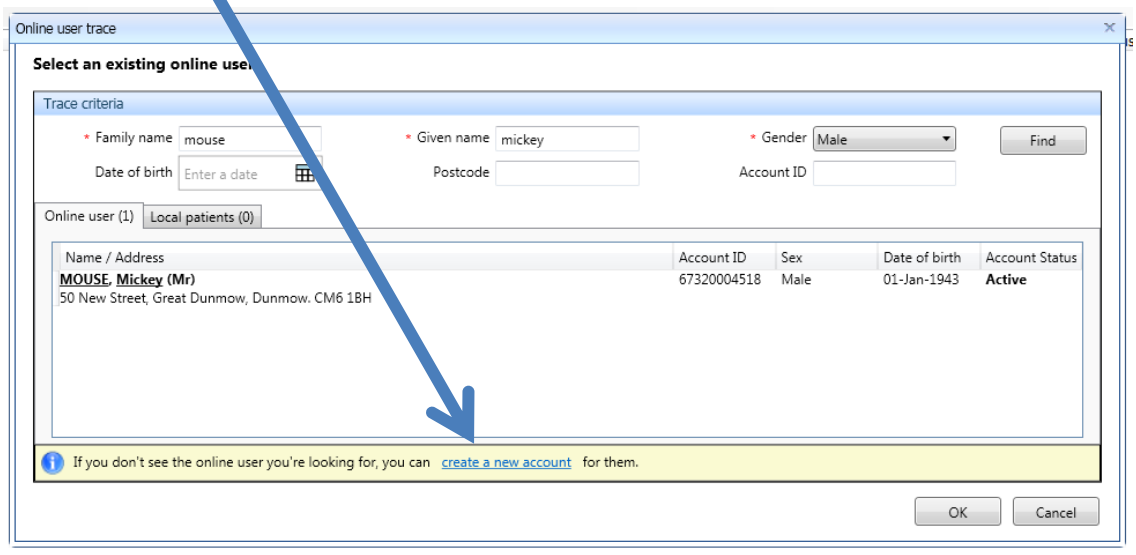
EMIS User guide for GP practices to set up a New Proxy User

1) Have an up to date resident list/report available
2) Scan and save all staff and resident authorisation forms before starting set up
3) Access the registration screen in EMIS
4) Select the required patient
5) On the registration screen, click the **Online Services Tab** within the patients record in the registration screen.
6) Click **Add** online user
7) Click **Add proxy user**
8) On the user trace screen, complete the marked * fields and click **Find**

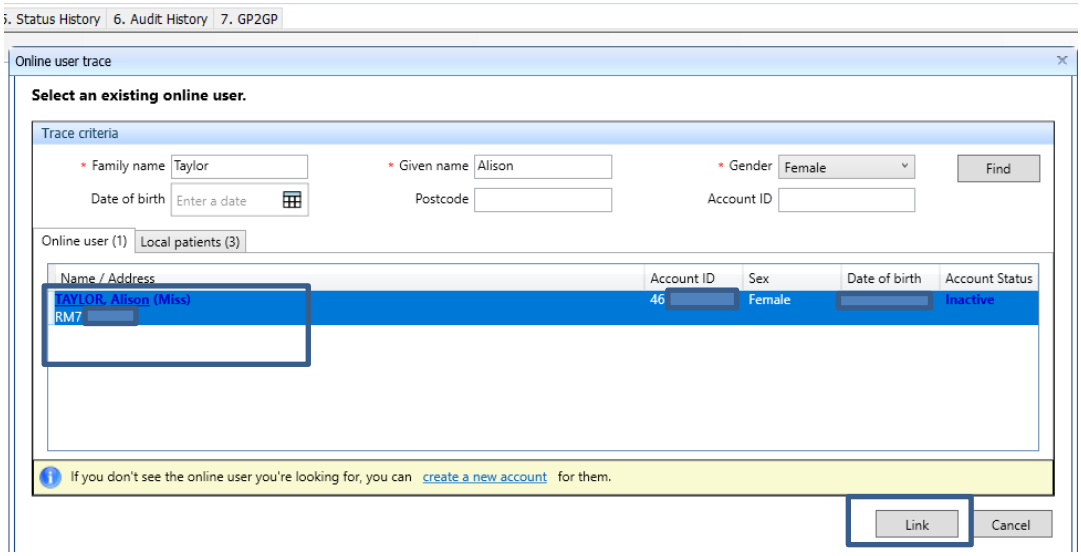


If the proxy user is a registered patient at the practice a new account must be created for them without an NHS Number so that the patient's information is not linked to their personal account, this only needs to be done once.

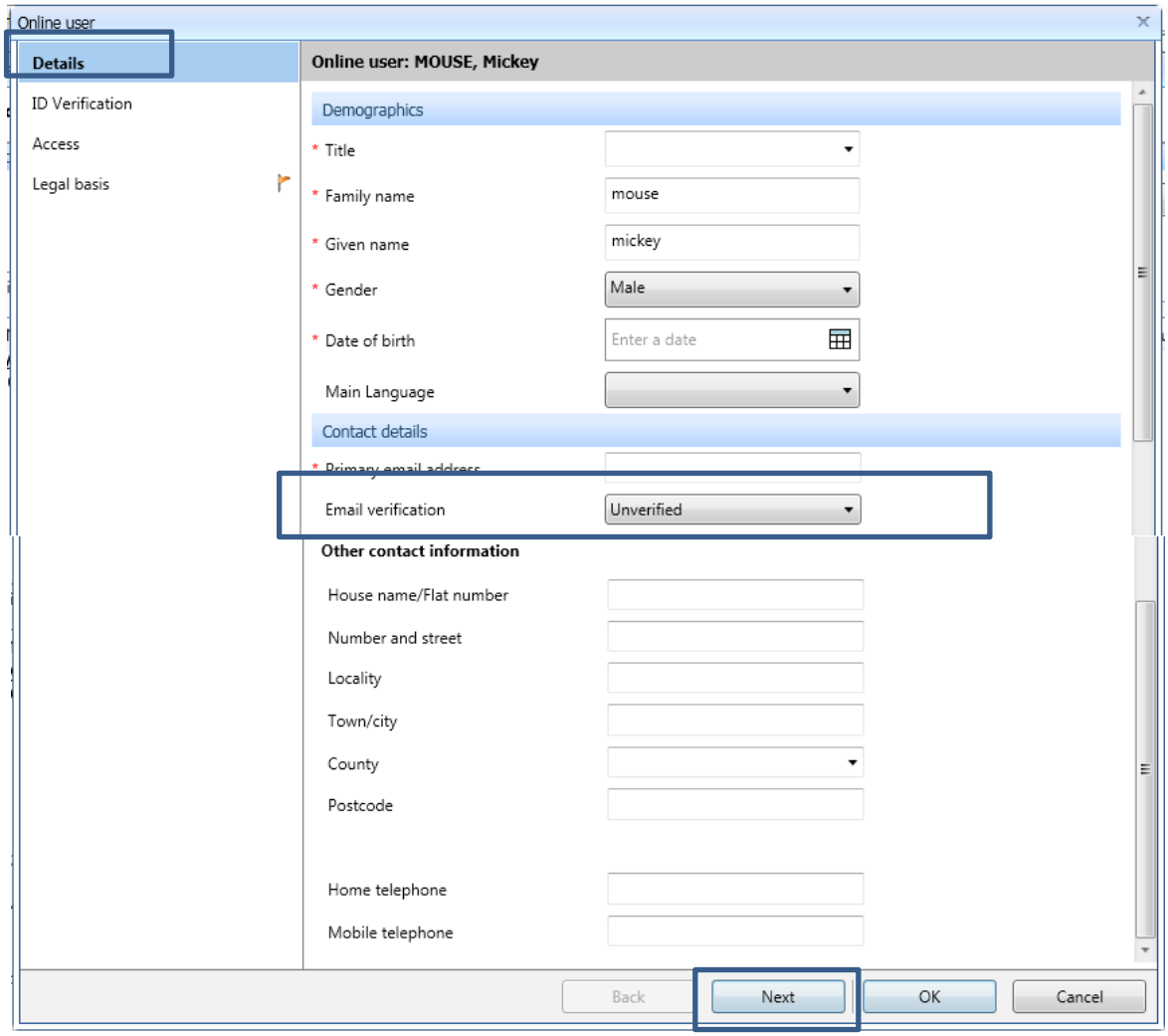
9) Click **Create a new account**



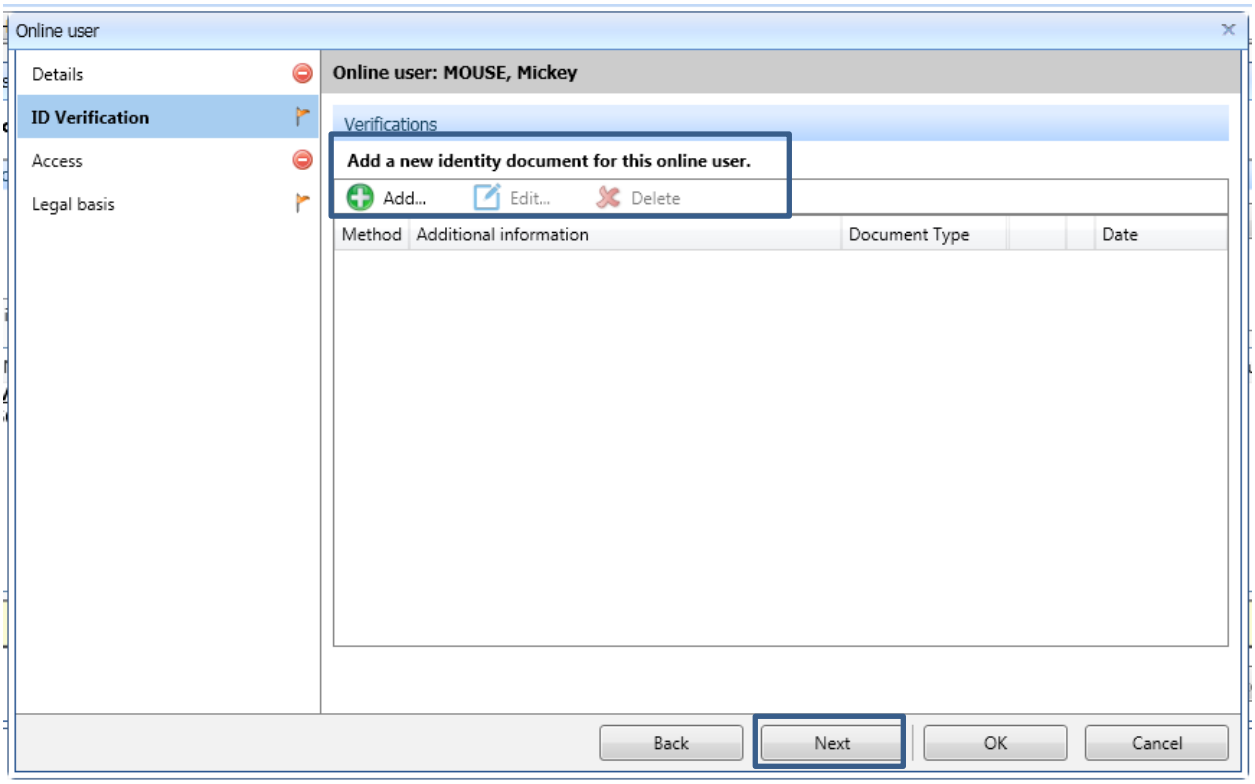
Next patient you add to this new account you will select the user you have just created and click link user.



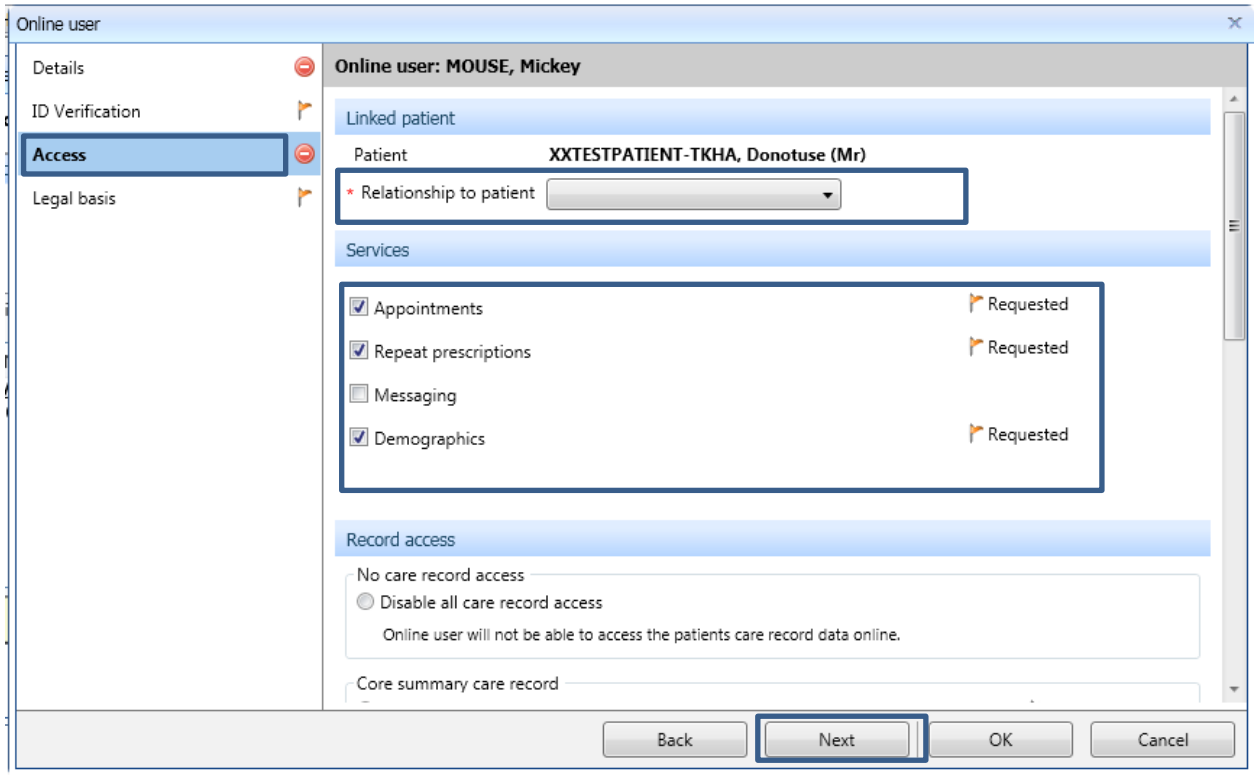
10) Details – Complete fields and you **MUST Verify Email address** click next.



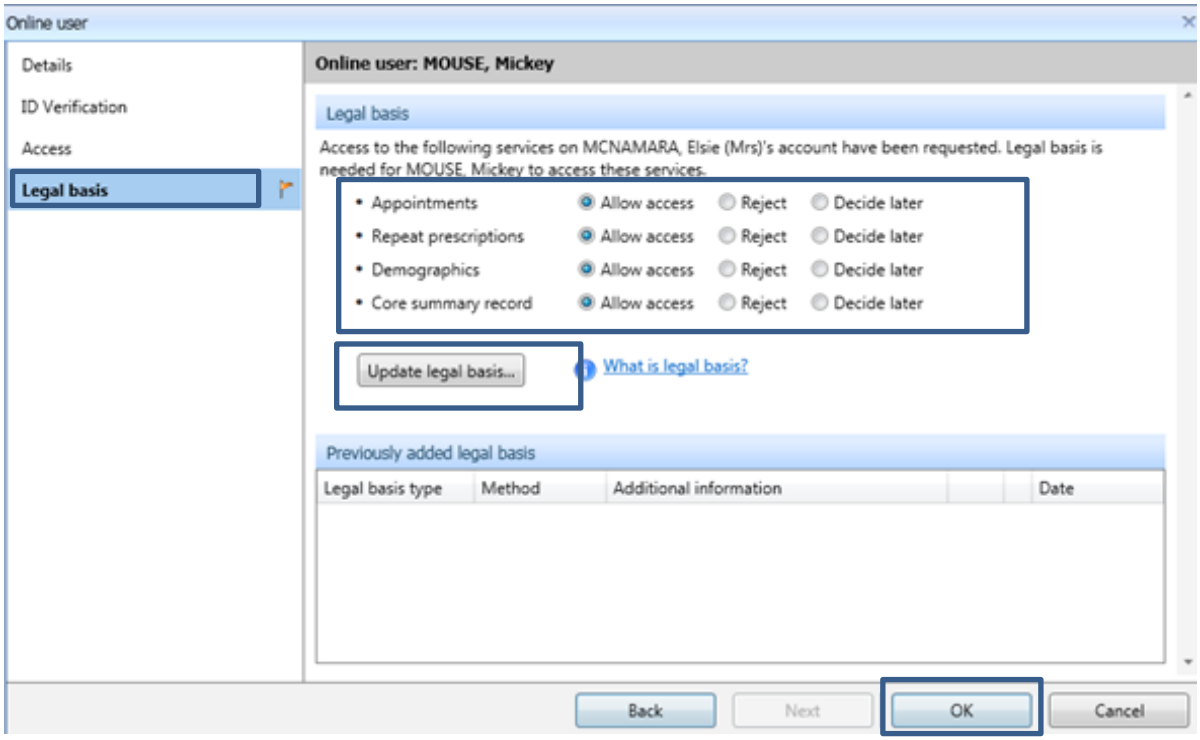
11) ID verification – click ADD to add the verification document from the staff member already saved – click next.



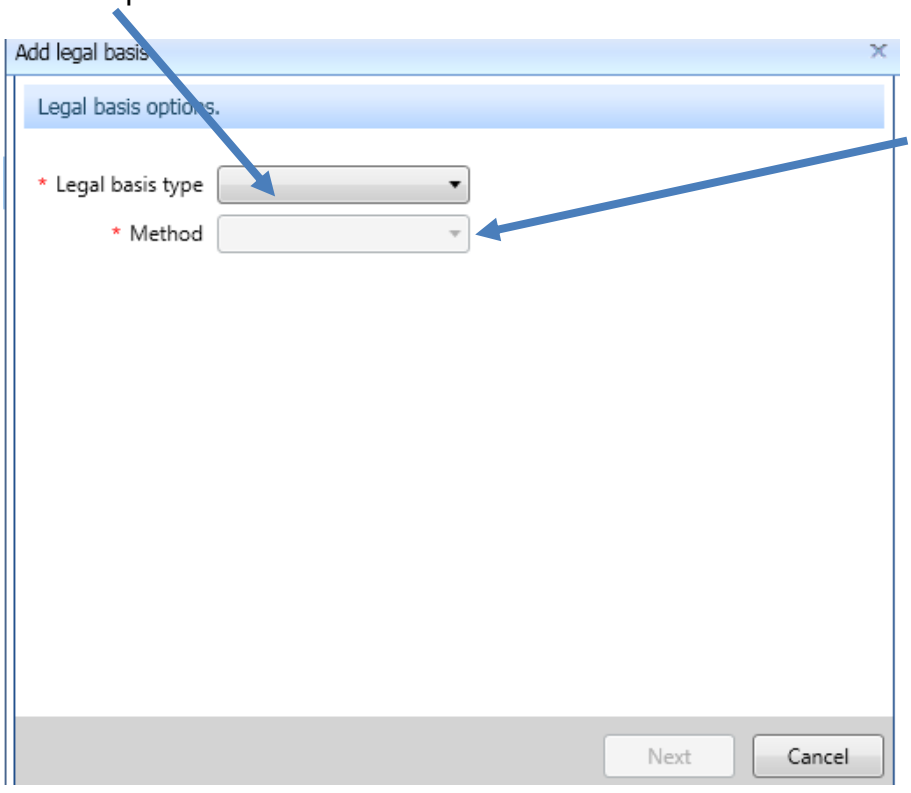
12) Access – complete relationship to patient field, untick services not needed by the proxy user - click next.



13) Legal Basis – untick access for Appointments and Core Summary Record to Decide Later - click Legal Basis - **Legal basis type**



Select 'Explicit Consent'



Method – Select 'Written or verbal' if written you will have to upload the patient authorisation form which is already on their record so can choose verbal and add a note – click next – click next – click save

If Legal basis appears again click Not Now and OK

14) Issue PIN documents by selecting 'Email PIN' (ensure user has a verified primary email address recorded before issuing the PIN)

Example of what user will receive via email

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:

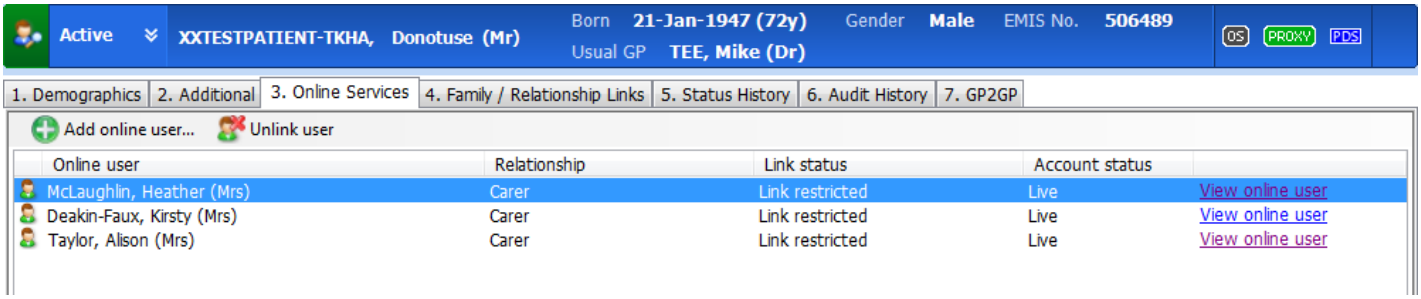
Service provider	Website
Patient Access	https://www.patientaccess.com

2. Provide the following online services account details when prompted:

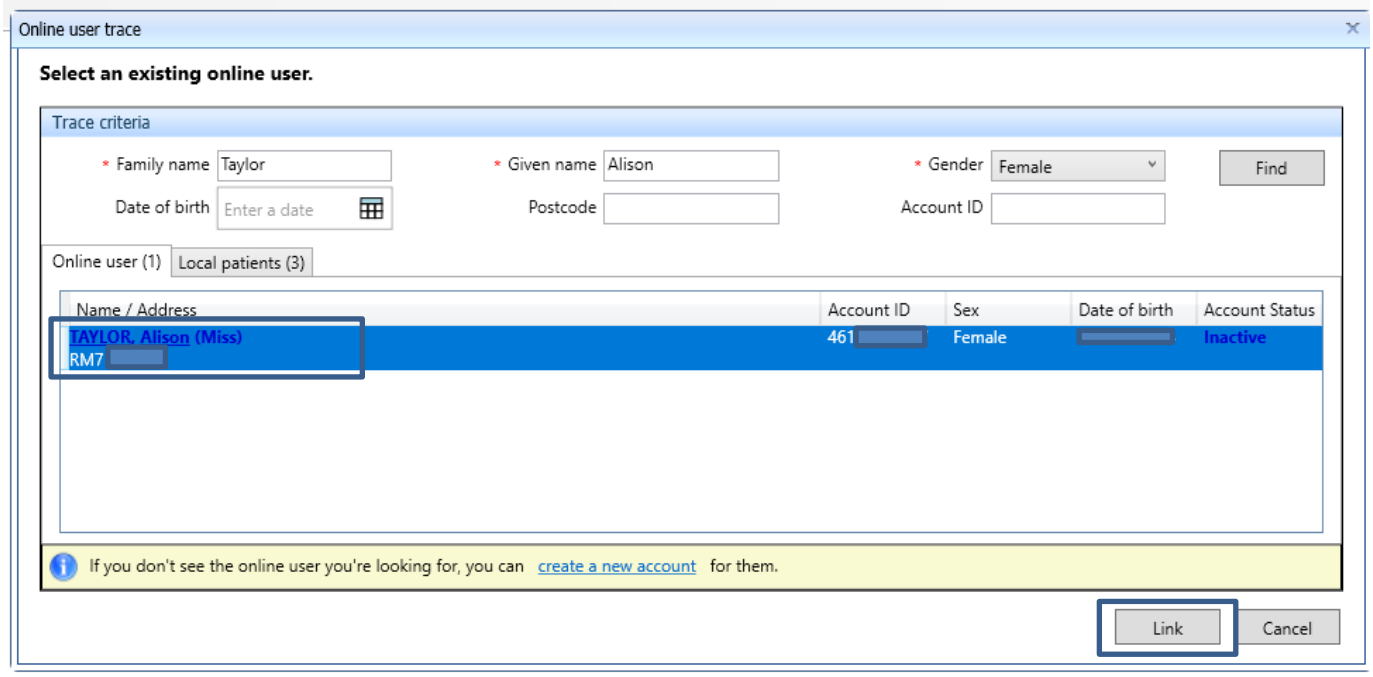
Linkage Key	Pk3hU[redacted]
ODS Code	F[redacted]
Account ID	2222[redacted]

Note: The account details are unique to you and were provided by John Tasker House Surgery

15) Online user account is created with an account status as **Active**, enabling user to start ordering medications by proxy once they have activated their account. This can be viewed under Account status in the online user screen.

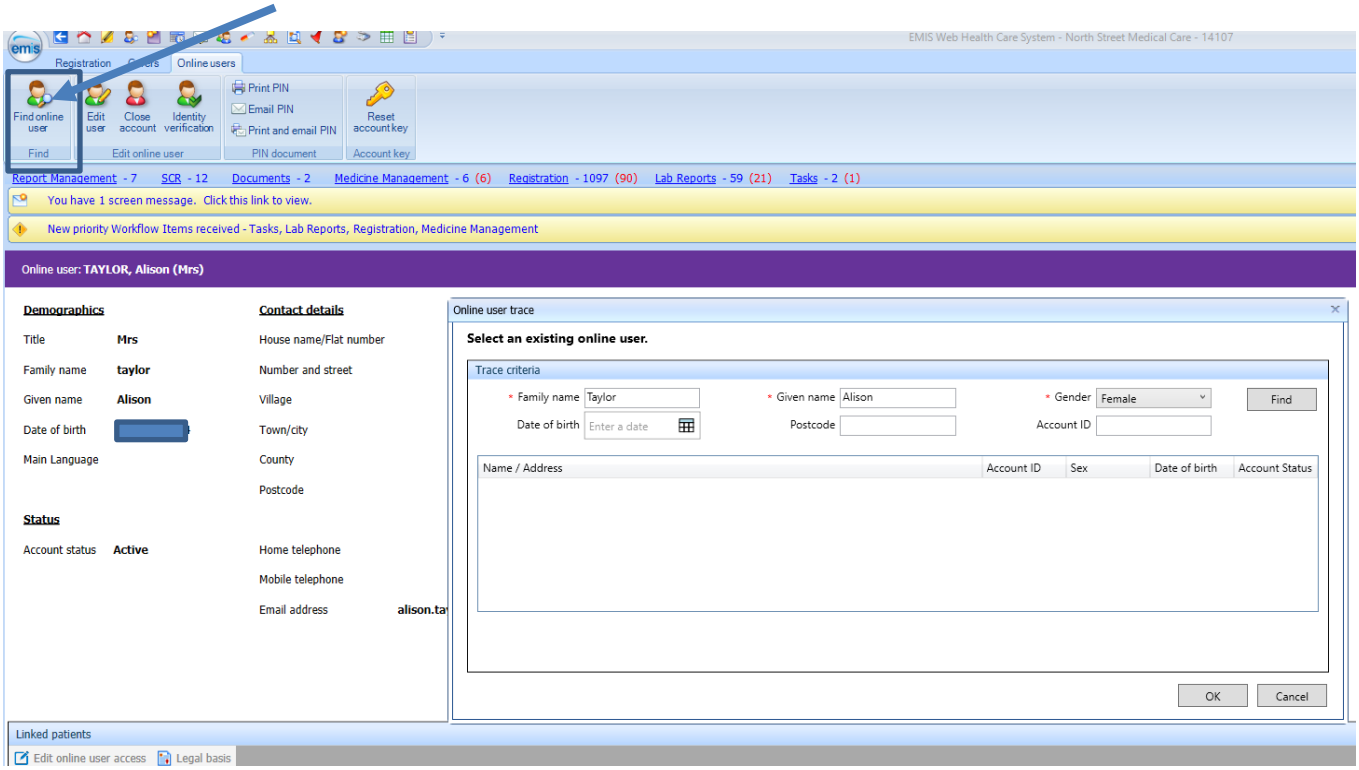


16) Repeat step 1 to 9 for each patient that the user is authorised to access. You do not need to create a new user when setting up access to additional patients, you should use the proxy user that has just been created.

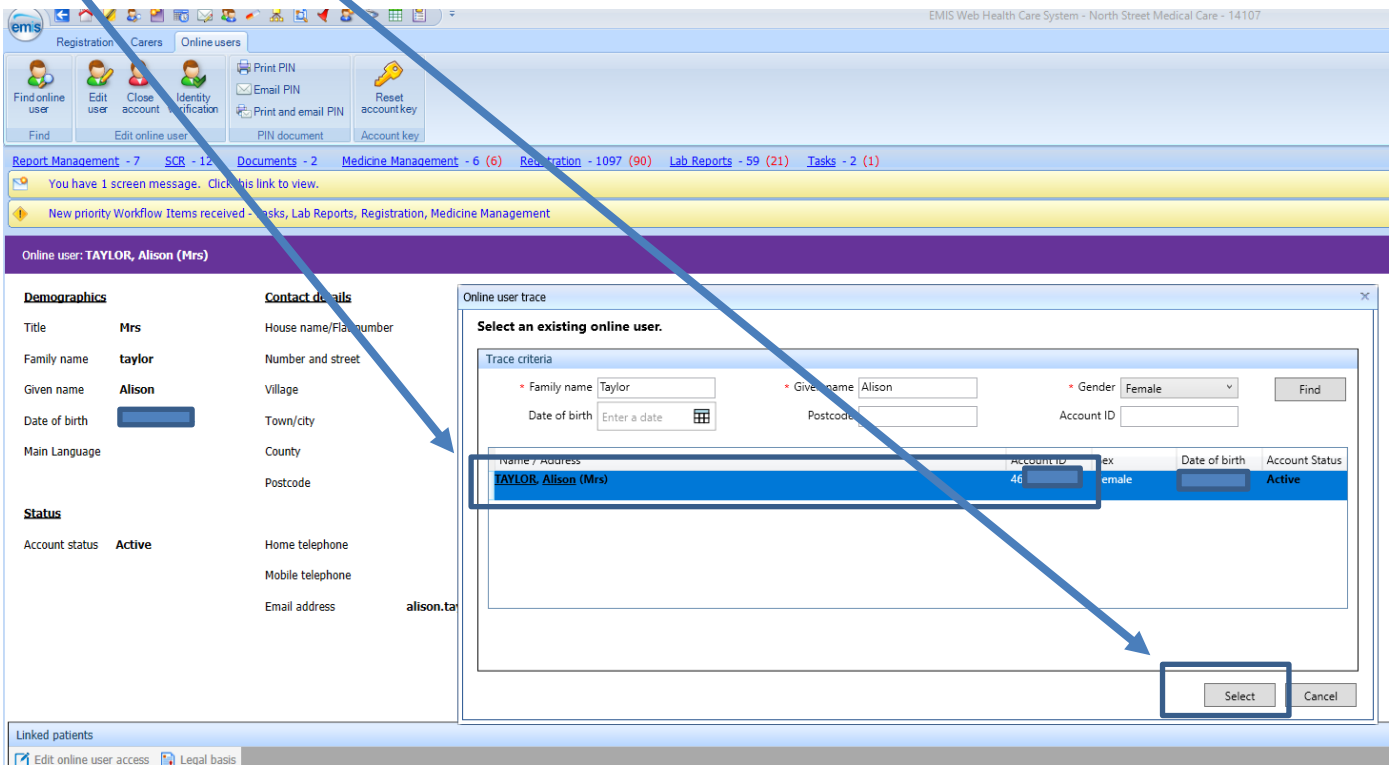


Staff member leaves care home:

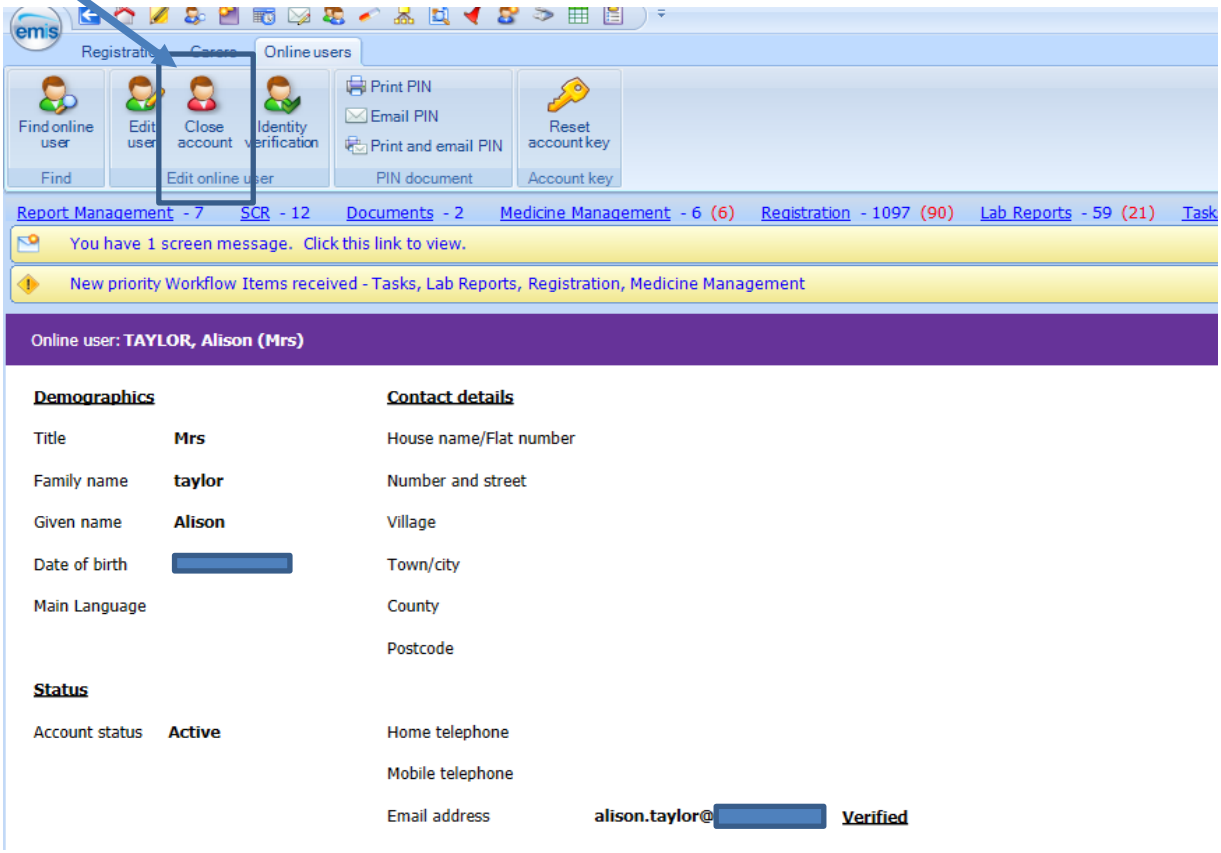
Search for online user:

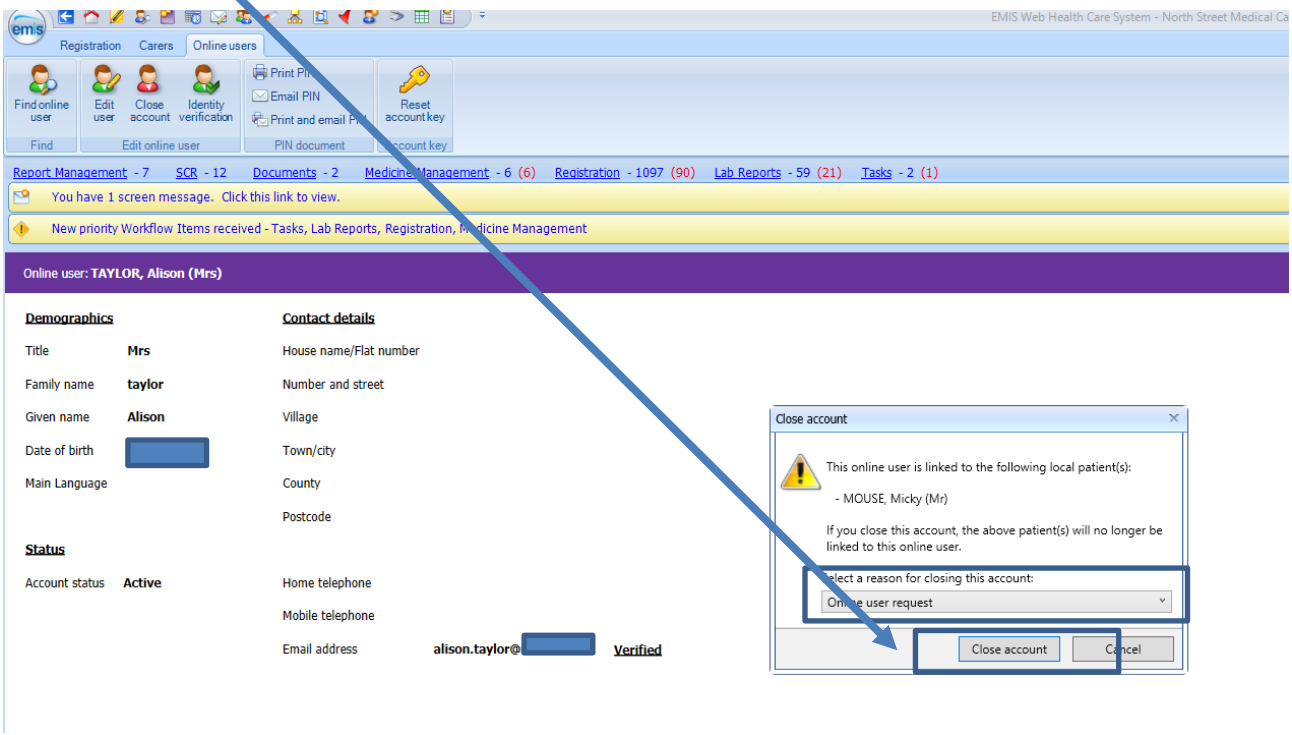


Click on user and Select



Click on close account



Select from drop down list as appropriate

Click **Close account**