NHS
Northamptonshire
Clinical Commissioning Group

Online Ordering (& EPS) Guide for Care Homes & GP Practices with EMIS web

Prepared by Care Home Advice Pharmacy Service August 2019

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Contents

Quick Step – by – Step set up:

A brief breakdown of the process for EMIS web online ordering set-up.

The full details and specific procedures follow afterwards.

- Make sure the online user's email address is not linked to a patient or to their own personal online ordering via the www.patientaccess.com site.
- Get the account deleted using patient access support (if it is already linked to an account on patient access) – take into account the link that they send only lasts for 24 hours, so needs to be done when the online user has access to their emails. Make sure the online user knows to look for this and confirm they want the account deleted. It also needs to be set up quickly after the account has been deleted, otherwise there will be no way of ordering for that specific resident.
- Set up on EMIS web – this can be done whilst waiting for the account deletion on patient access – they aren't linked until the end.
- Set up on EMIS web by going into the resident, then selecting the online user and selecting proxy access. (This is the opposite of SystmOne – we add the user to the resident, not the resident to the user).
- Once all residents have had the online user added as their proxy use, print off an online service detail (this may be printed on the first resident set up and kept) – this has the linkage key and account ID, to be able to set up correctly on www.patientaccess.com
- Go to www.patientaccess.com and set up an account for the online user.
- Link the patient access account to the surgery, using the linkage key and account ID.
- Make sure all the residents are visible and you are able to access online medication ordering.
- Pass on the details of the ID and password to the online user 'securely'.

Introduction

This guide is for GP practices using EMIS web and care homes to enable and manage online ordering of prescriptions by care home staff.

EPS in Care Homes

In **most** circumstances EPS without online ordering is **NOT** suitable for the bulk of regular prescribing in a care home.

Why?
A care home must be able to check that what they have requested on the repeat slip from the practice has been issued and they should have the prescription back to check this before it is sent to the pharmacy for dispensing. There is no prescription to check if the prescription is sent electronically. Once checked the care home can then follow up any discrepancies with the practice rather than waiting until the medication delivery when there is little time to identify discrepancies or get the correct medication in before the next month's medication cycle starts.

When is EPS suitable?
EPS is only suitable if the care home is ordering their medication online. The care home is able to check online when their request has been accepted by the practice and a prescription has been issued. This process is often quicker and is auditable.

What about 'tokens'?
The GP practice or pharmacy could print the 'token' for the care home to use as their check. However, most GP practices would prefer not to do this as they might as well print the prescription and when the pharmacy prints the token it can be difficult to get a good system in place. The pharmacy must make sure all the 'tokens' are printed and must arrange to get them to the home with sufficient time for the home to check **before** they are dispensed. Tokens are not needed when ordering online.

What is involved in online ordering?
- Set up for the care home will involve obtaining consent from their residents for proxy access to online services.
- Care home staff will need to learn a new system for ordering their medications.
- Set up for the GP practice will involve adding the care home staff as online users and assigning the residents to their online user accounts.
- Each staff member will have their own username and password that will access all the care home residents. This is unique to them and access is auditable.
- The GP practice should try and make sure the repeats are aligned, interim scripts are being issued to bring repeats in line and quantities on repeat are appropriate.
- The CHAPS can support with this process.

What else should be considered when thinking about EPS in care homes?

On the 'paper' system the repeat prescriptions are sent to the pharmacy for dispensing in a pile together. When they go EPS they are sent as they are signed by the GP and not all in one go. The prescriptions will be mixed up with all the pharmacy's other prescriptions and there is no way for the pharmacy to identify if a prescription is a repeat for next month, interim or acute. The care home must have a robust communication process in place to ensure that the pharmacy is notified when an item is needed sooner than with the monthly repeat medications.

What if the GP is not signed up for EPS?

There are a small amount of practices that have chosen not to do EPS, which means these will still have paper prescriptions produced. The home will still be able to order online, but a system must be put in place in regards to the collection of the paper prescriptions. This may be the pharmacy provider or the home, but a robust system and procedure must be in place to avoid errors.

Risk Assessment Tool

Before starting the process of implementing online ordering or EPS in a care home the risk assessment tool should be completed. This is a useful step in discussing key areas to the process. It is recommended that the GP practice and Care Home meet to discuss the process and risk assessment tool so that any changes to the current process can be agreed. See appendix 1.

Irregular Issued Repeat

EMIS web does not require any irregular boxes to be ticked. EMIS web will allow ordering early for all online orders.

Consent for Online Access (Care Home)

Care home staff are able to request proxy access to online services for their residents. Before setting up online services consent must be gained from the resident wherever possible. The information leaflet in appendix 2 can be adapted by the care home to help explain online access to their residents.

The Proxy Access form should be completed for each resident – see appendix 3.

Where the resident does not have capacity, online access may be allowed where it is felt to be in the resident's best interests. Decisions of family members, those with lasting powers of attorney or court appointed deputies should also be respected. Further information can be found in the 'Proxy access – guidance or general practice' created by NHS England and the RCGP and found at the following site:
http://elearning.rcgp.org.uk/mod/page/view.php?id=4775

The proxy access forms should be submitted to the CHAPS team member supporting the initial set up of online ordering. Following this initial set up the care home should be aware of the following:

- Proxy access is set up only for the staff members listed on the above forms. If a new member of staff starts then the above paperwork will need to be submitted again for that new member of staff.
- If a staff member who has been granted online access to the care home's resident's leaves employment at the home then the care home must inform the GP practice immediately for access to be revoked.
- When a new resident arrives at the home the above paperwork must be completed and submitted to the GP practice for online access.

Setting up Online Access (GP Practice)

Once the consent paperwork has been submitted by the care home, the CHAPS / GP practice are able to add the care home staff members as online users.

1. First Steps – Checking on Patient Access

Before setting up the online user we need to make sure the email provided is not already in use. If we do not do this, it can cause confusion once setting up on EMIS web. If the care home already order online the old way, without bulk proxy access, the procedure will be more time consuming and lengthy than if you are setting the home up for the first time. The complication occurs when setting up the online user on patient access, not on EMIS web. Patient access is recognised through the online user's email address. Therefore, the email for the user must NOT be in use already and connected to a resident or their own online ordering account.

NB: You may need to use google chrome to load patient access and it doesn't load properly on work laptops.

Checking if the email address is in use:
- Go to www.patientaccess.com
- Select 'register'
- Enter all the details of the online user
- Click 'continue'

- Add the email address and make up a password for the online user – Keep a note of this. Accept the terms and conditions and then 'create account'.
- If the person is already registered you will get this message

- If the person is not already registered you will get a 'Success' message and a prompt to link to the surgery – leave patient access at this point and don't go any further. You must now do the set up on EMIS web before proceeding with patient access set up.

Steps to take if the email address is in use:

- Firstly, make sure that the person is not using this email address for their own personal online ordering, as it will prevent them from ordering their own medicines if we cancel it.
- If they are using a personal email address for ordering, a new one for the home and to order for the residents will need to be created. Then you will not need to do the following steps, as it won't be linked to anyone on patient access.
- Before proceeding any further – check the member of staff has access to their email for the next 24 hours, as the link to confirm deletion only stays active for 24 hours.
- Also, make sure they are not just about to do their monthly medicines order, because once the email connection is deleted there will be no access to the resident associated with it. You also need to get the set up done as soon as the account deletion has been processed, so that the home can order for the all the residents, including the resident now disassociated with the email – it is worth planning this in advance so that the whole procedure can be done when the member of staff is in and you can also access the GP system to set up the online user.
- Once you are sure the email address is not connected to a resident and not personal use of the online user, go back to the main screen on www.patientaccess.com
- Click on 'contact support'; click 'ask'; then click 'email-no time to wait around' and then select 'account deletion' – as shown below.
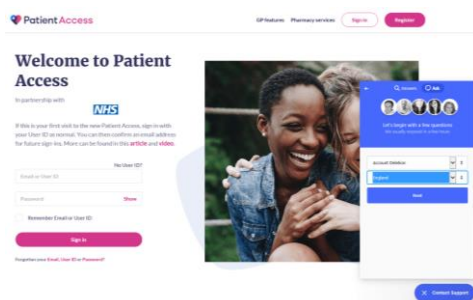
- Once you press contact support, the following box will appear. Fill in all the details, along with the online user email that you want the accounts deleted from. Then click 'contact support'. You will get an email response in around 2-3 hours to confirm that you want them deleted.

- Once you confirm that you want the account deleted, the online user will get an email with a link to confirm they are happy for their email account to be deleted.
- The link ONLY LASTS 24 HOURS. If they do not click the link within 24 hours you will have to do the whole process all over again.
- Once the online user has clicked this link you are able to set them up correctly on patient access.

2. Adding a proxy access user to a patient/resident:

NOTE: This part can actually be done whilst waiting for the patient access account to be deleted. The set up on EMIS isn't associated by the email address. It is only when you link the patient record on EMIS web to the patient access records that the email association takes place. This is why we need to do the first process, so we can link the two successfully.

- Scan the proxy access form that has been signed by the online user. Save this wherever it is easy for you to access whilst on EMIS web. For example the desktop or into one of the residents notes. The process of setting up the online user asks for a document for evidence, so getting this ready at the start makes the process smoother.
- Search for the first resident.
- Highlight registration
- Select 'registration' from the options.
- As shown below – select 'online services' from the tab.

- Unlink any associated users currently set up for that resident by clicking on the names of the person set up and then clicking 'Unlink User'. You will get a prompt asking if you want to delete. Click 'delete link'.
- Click 'add online user'
- Select 'add proxy user'
- The box below will appear. Add all the details of the online user to be associated with this resident/patient. Then click ok.
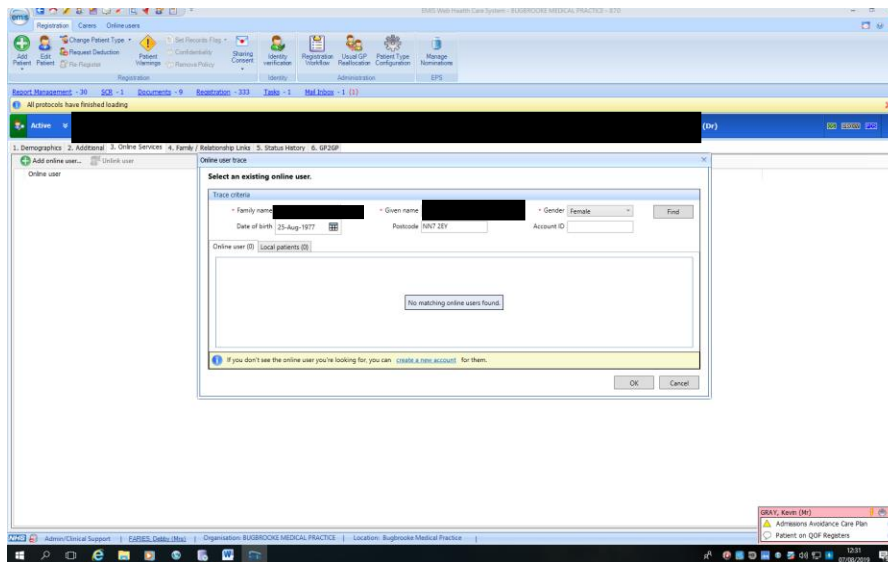

- The first resident set up to find the online user, it will say 'no account found' and you will select 'create a new account'. Once the online user is set up after the very first resident, you will be able to find them and pick them from the list, to select as the online user.
- Continue with creating a new account - you will get a pop up to fill in all the details of the online user that you are creating. Fill all of this in. Tick the drop down to say the email address is verified, otherwise this will prevent them linking with patient access. Click Next.
- On the next screen you will be asked for ID verification. Click 'add' and then 'personal verification'. The CHAPS name should be used for vouching as they are the contact between the care home and the GP. Search if your name doesn't automatically appear. Select your name and click 'save'.
- It will take you back to the set up template. Click 'next' again and it will take you to the next part of the set up. The screen should like as below:
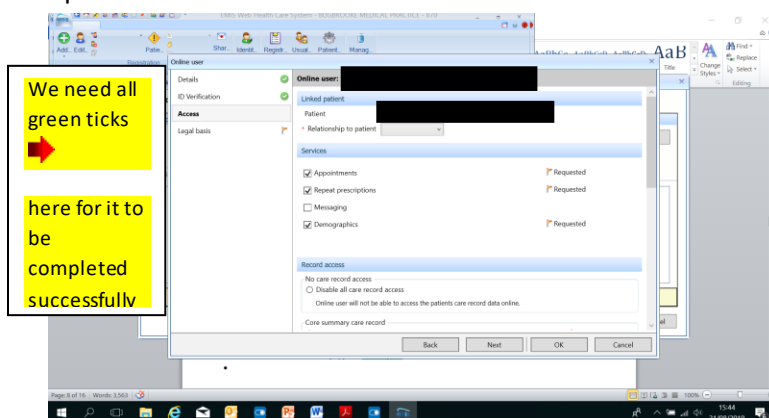

- Tick all the boxes for appointments, request prescriptions, messaging and demographics. Select relationship to patient as carer. Then scroll to the bottom and click next.

- As shown below – tick 'allow access' for appointments, repeat prescriptions and demographics, but not core summary record. Then click on 'update legal basis'. This will take you to another pop-up. Click legal basis type as ' Explicit consent' and method as 'written'. Then click next.
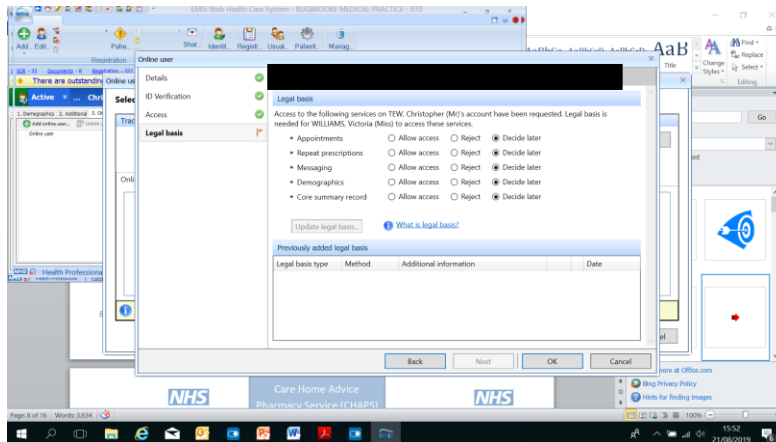
- You then get another pop up box. This is the screen that allows you to add the proxy access form, with the online user's signature as evidence. If you don't add this then all the green ticks do not appear and this will prevent it being linked when log in to patient access.

- Then you should have the picture below. All four green ticks need to be present to enable the link to patient access set up. Click OK if all the ticks are green. Go back to investigate if one of the categories has a flag.
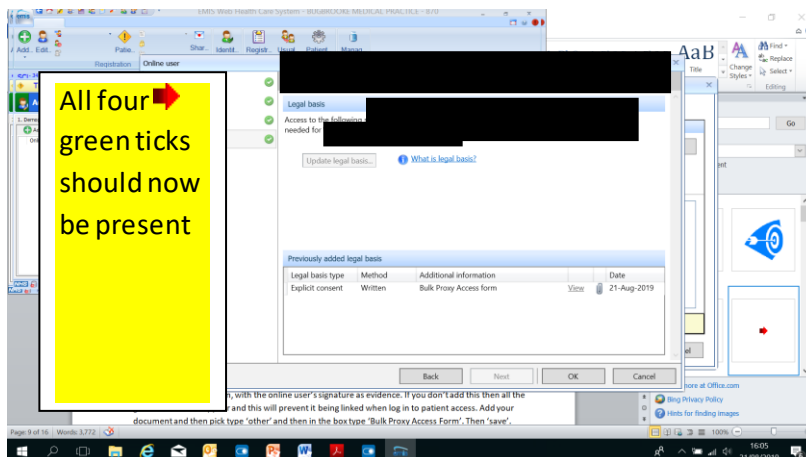
- You will then be given the option below. You can opt to print at this point and it will print you a code that will be needed to link and set up patient access. If you do not print here you can always print it later, by finding the online user.
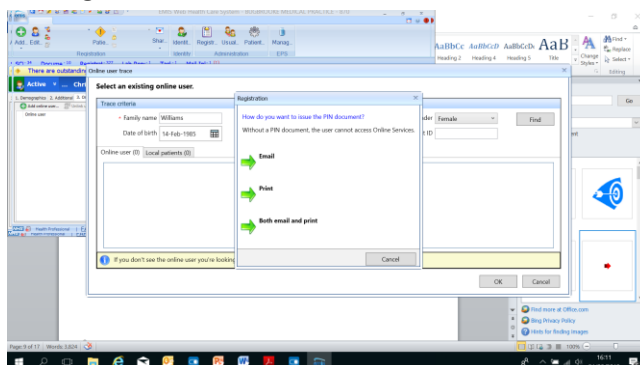
- Once printed, you will automatically be taken back to the patient registration screen, but this time it will show the online user set up and linked.

- At this point do the whole process again with a second person that may be allowed access to proxy access for the patient.
- Repeat this for all other residents in the Unit/Home that the online users are allowed access to.
- Once complete for all residents and all online users, make sure you have the print out for each online user, that has their linkage key code and their account ID, ready to set up on patient access.

3. Setting-Up Patient Access

- Go to www.patientaccess.com
- If they user already has a password set up, then type in the email and password on this screen. If not then go to 'register' and set it up as we did at the beginning of the process. Then log in.
- Click ''next' through the first few screens until you get to 'finish'.
- On the home screen there is an option to 'Link Your GP practice'. Click on this.
- Type in the postcode of the practice and search.
- Select the practice from the list brought up by the search and click continue.
- It will ask if you have a registration letter from the practice – to which you will click 'yes'.
- At this point you add the linkage key and the account ID and click 'confirm'.
- The next screen should find all the details of the online user from the GP system. The house name will be blank and you have to fill this in EXACTLY how it is written on EMIS web, or else it will not link the two accounts.
- Then confirm the details with the password you have already set up for the online user and click 'link account'. It will then link the two accounts.
- If it says there's an error, check all details match EXACTLY as it says on EMIS web, down to capitals and lower case and the date of birth etc…
- Inform your online user of their login details and password and ask them to change their password the first time they log in.

EMIS web helpline number: 0330 024 1270 (You will need to tell them the surgery code number for them to help)

Appendix 1 - Risk assessment tool for online ordering and EPS in care homes

Care Home:	Discussion with and date:
GP Practice:	Discussion with and date:
Pharmacy:	Date informed:
Item for discussion	**Details and concerns**
Monthly repeats will be requested online but how will the care home submit interim requests?	
How will the care home communicate different quantities that are required or items that do not appear on repeat?	
Online requests will come through to the practice as a task along with all other patient requests. From the task list there is no way of identifying if the request is for a care home or not. Will this impact on the practice?	
Care homes usually order their monthly repeats in week 2 of their medication cycle (2-3 weeks before it is due). When ordering online the tick box will only be available 7 days before the medication is due. The work around is to mark all care home repeat templates as irregular; however, this also removes the 'issuing too early' prompt. How will this impact on the practice?	
Consent paperwork is staff member specific so if a new member of staff requires access to online ordering these will need to be submitted again.	
When a staff member leaves the practice should be informed immediately so that their access is revoked.	
When EPS prescriptions are sent to the pharmacy there is no way to identify if a prescription is a repeat for the next month or an interim/acute that is needed sooner. How will the care home communicate interim/acute prescriptions to the pharmacy?	
Following the online ordering the care home should log back in to confirm that all items requested have been issued. How will the care home follow up discrepancies with their order?	
When chasing prescriptions the first action is to check the online repeats list to confirm it has been issued. The pharmacy can then be contacted – if they do not have the prescription yet then they can look on the prescription tracker.	
Start date of next medication cycle:	
Planned first online order:	

Appendix 2 - Online Services Records Access - Patient information leaflet 'It's your choice'

As part of the governments drive to make it easier for people to access medical services it is now possible for you to order your medication online (You can also view your medical records and book appointments too) Being able to order medication online will help the staff that cares for you at **CARE HOME** obtain this more quickly and efficiently. If you decide not to do this or wish to withdraw, this is your choice and practice and care home staff will continue to treat you in the same way as before. This decision will not affect the quality of your care.

CARE HOME will be given login details that are unique to you. This will ensure that only you and your carer are able to access your record.

Repeat Prescriptions

With online access authorised staff at **CARE HOME** can:

- View a list of your current repeat medication list and easily select the ones that need ordering.
- Include a message with the request (e.g. ask for your prescription to be sent to your local chemist)
- Track your order— The request will be shown as 'Accepted' once it has been processed, or display an 'R' if your request has been rejected by your doctor.

The practice has the right to remove online access to services for anyone that doesn't use them responsibly.

It will be the responsibility of **CARE HOME to keep your login details and password safe and secure. If you know or suspect that your record has been accessed by someone that you have not agreed should see it, then your password can be changed immediately.**

The practice can remove online access until you are able to reset your password.

Repeat prescriptions online

GP appointments online

It's Your Choice

View your GP records
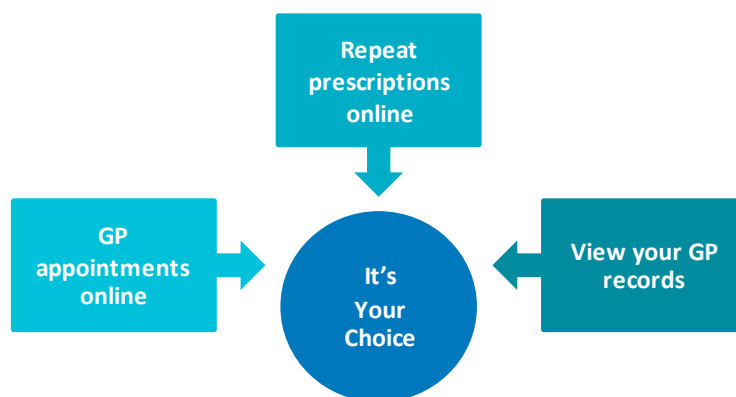
More information

For more information about keeping your healthcare records safe and secure, you will find a helpful leaflet produced by the NHS in conjunction with the British Computer Society:

Keeping your online health and social care records safe and secure
http://www.nhs.uk/NHSEngland/thenhs/records/healthrecords/Documents/PatientGuidanceBooklet.pdf

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Appendix 3 – Proxy Access Request

GP Practice:	
Care Home:	
Resident name:	
Resident DOB:	

Section 1 – Resident Consent

I, ……………………………………………………………. (name of patient), give permission to my GP practice to give the care home staff members listed on this form proxy access to the online services for online prescription management.

I reserve the right to reverse any decision I make in granting proxy access at any time.

I understand the risks of allowing someone else to have access to my health records.

Signature of Resident	Date

Section 2 – Resident does not have capacity

If the resident does have capacity to consent to grant proxy access, consent must be gained from the resident.

Capacity assessed by	
Date	
Signature	

Section 3 – Care Home Staff Details

Care home staff members requiring access should complete their details below and sign to confirm that they understand their responsibility for safeguarding sensitive medical information and understand and agree with each of the following statements:

1.	I/we have read and understood the information leaflet provided by the practice and agree that I will treat the patient information as confidential
2.	I/we will be responsible for the security of the information that I/we see or download
3.	I/we will contact the practice as soon as possible if I/we suspect that the account has been accessed by someone without my/our agreement
4.	If I/we see information in the record that is not about the patient, or is inaccurate, I/we will contact the practice as soon as possible. I will treat any information which is not about the patient as being strictly confidential.

Care Home Staff Name	
Job Title	
Date of Birth	
Email (if applicable)	
Signature	

Care Home Staff Name	
Job Title	
Date of Birth	
Email (if applicable)	
Signature	

Care Home Staff Name	
Job Title	
Date of Birth	
Email (if applicable)	
Signature	

Care Home Staff Name	
Job Title	
Date of Birth	
Email (if applicable)	
Signature	

Care Home Staff Name	
Job Title	
Date of Birth	
Email (if applicable)	
Signature	

CHAPS team member setting up access	
Job Title	
Date access granted	

THIS CONSENT FORM WILL BE RETAINED BY THE GP PRACTICE