



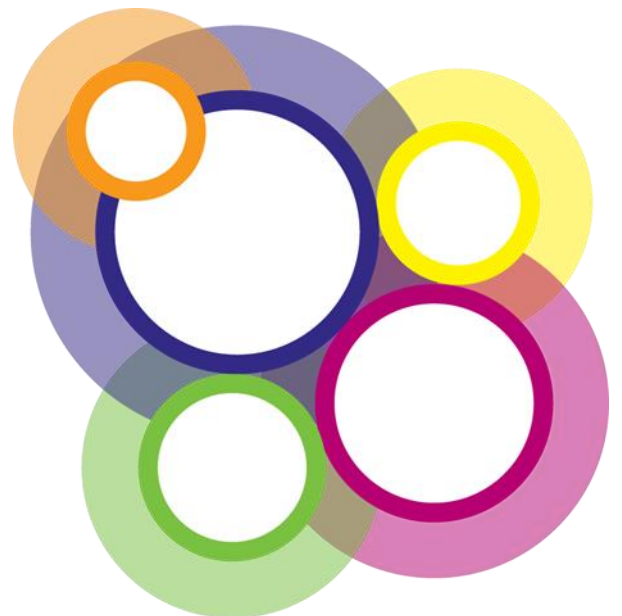
North of England  
Commissioning Support

Partners in improving local health

**NECS Clinical Systems Specialist Team**

# SystemOne – SystemOnline User Account for Proxy User Guide

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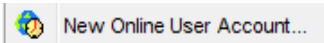
## SystemOne – Granting Proxy Access to Online Service (Non Registered Patient)

It is possible to set up a patient's relative, friend or carer, even if they are not registered at the Practice, as a proxy user to a currently registered patient.

For example a daughter needs access to her elderly father's account. The father is registered at the Practice, the daughter is not.

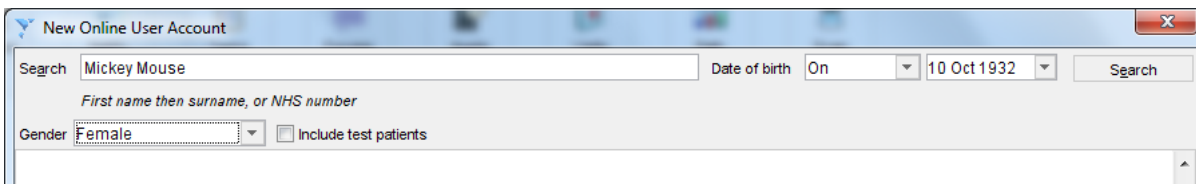
**Note:** Ensure the practice protocol is followed for recording proxy access

1. Search for the person to see if they are registered on SystemOne and on the Spine, from the Main Menu select **Patient - Patient Maintenance - New Online User Account**



The New Online User Account dialog is displayed

2. Enter the relative, friend or carer's name (forename and surname) or the NHS number if known), the **Date of Birth** and the **Gender** and click **Search**

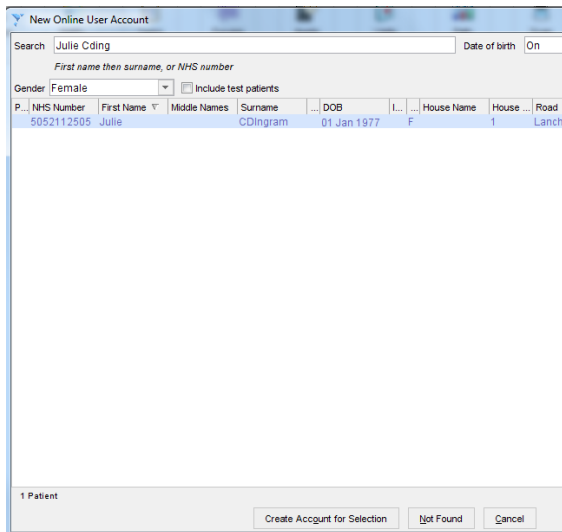


3. If any patients are found that match the search criteria, they are displayed. SystemOne uses the following colour coding:
  - a. **Black** – Spine patient record
  - b. **Blue** – currently registered on SystemOne
  - c. **Grey** – patient not currently registered on SystemOne but has been in the past

If the person you are looking for is not listed in the search results, click **Not Found**

Or

If the relative, friend or carer's details are displayed, select them and click **Create Account for Selection**

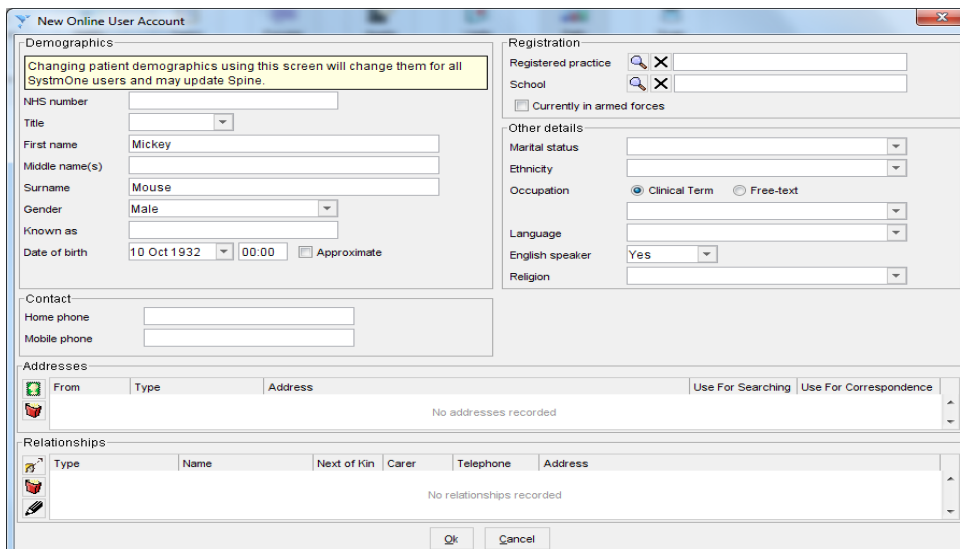


P...	NHS Number	First Name	Middle Names	Surname	DOB	L...	House Name	House...	Road
	5052112505	Julie	CDIngram	CDIngram	01 Jan 1977	F	1	1	Lanchi

**Note:** If you select **Create Account for Selection** above, and you change any of the details on the **New Online User Account** dialog, it will amend the details held on the SystemOne database for that patient and may update Spine.


If there is both a **black** Spine and a **blue** SystemOne match that have the correct details, choose the **black** Spine account.

#### 4. The **New Online User Account** dialog is displayed



#### 5. To record the **online user's details** on the **New Online User Account** dialog follow the below instructions:

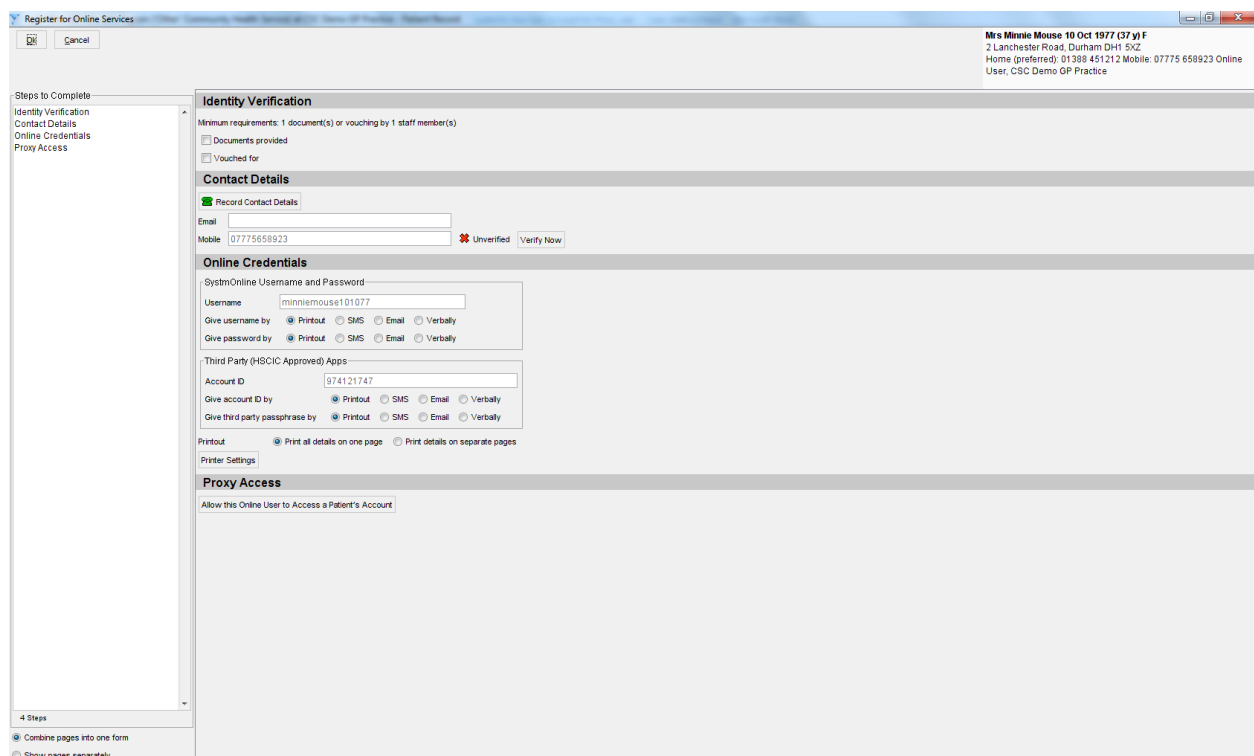
- Check/amend the details in the '**Demographics**' section. The **name, gender and date of birth** details you have already entered are completed for you. Additional details will be completed if you selected **Create Account for Selection** in step 3 above

- b. Record the relative, friend or carer's home and mobile telephone numbers in the **Contact** section
- c. Select the appropriate options from the drop -down lists if you want to record **other details** about the person (optional)
- d. Click the stamp icon to record the online user's address details 
  - Select the address type and click **Ok**
  - Type the postcode into the **Post code** field and click **Find**. (If you do not have the postcode, click **Find** and follow the instructions.)

**Note:** You will be asked to record relationship details later when you set up the proxy access, therefore, there is no need to complete the '**Relationship**' section.

- e. Click **Ok** when you are satisfied with the details you have entered

6. The **Register for Online Services** dialog is displayed

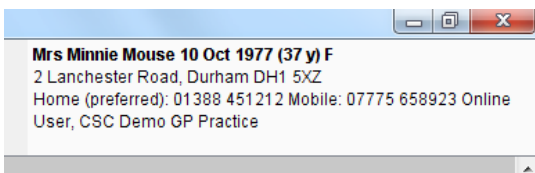


7. You must now complete the following sections of the **Register for Online Services** dialog in order to give the online user their own login credentials and **grant proxy access** to online services for the patient

- a. Identity Verification (documentation and/or vouching)
- b. Contact Details
- c. Username & Password (printout, SMS etc.)

- d. Proxy Access – search and select the registered patient, select the services the proxy user will have access to for example appointment booking, medication requesting.  
When recording relationship details, ensure that you select the **relationship of the online user to the patient**, for example if the online user is the grandson and the patient the grandmother, you would select '**Grandson**' as the relationship type.  
Record an access end date.  
Complete the **preferred method** of contact and the **basis for granting access**.  
Click **Ok** when done

8. '**Online User**' is displayed in the **Patient Demographics Box** to distinguish between an **online user's** record (person not cared for by your organisation) and a **standard patient record** (patient registered for care at your organisation)



9. Ensure that you **Save** the online user's record

**Note:** You cannot use the Quick Patient Search (F10) or Patient Locator to find an online user's patient record and you cannot save clinical data in an online user record. To view the record of an online user at your organisation, see below

## Finding and Retrieving an Online User Registered at Your Organisation

1. To view a list of all users registered to access online services at your organisation, including online users who are not patients, select **Patient - Patient Maintenance - Online Users** from the Main Menu

NHS Number	Online User	Registered
	Miss Wednesday Adams	10 Dec 2019
8758378669	Mr Leslie Mark Ainge	18 Jan 2016
4564234897	Mr Sterling Archer	16 Mar 2020
4996398922	Mrs Ada Lynn Broughton	11 Jun 2018
4435587505	Mr John Brown	22 Aug 2018
	Mr Molton Brown	14 Aug 2018
5171495955	Ms Cecilia Alisha D Cavanagh	18 Dec 2015
5052112505	Miss Julie CDIngram	17 Nov 2015
6262332626	Mrs Jean Dunn	13 Aug 2018
9999999999	Miss Daisy Dunnock	14 Dec 2015

2. To retrieve an online user's record, right - click on an entry and select **Retrieve Record**. No clinical information can be recorded in to the record

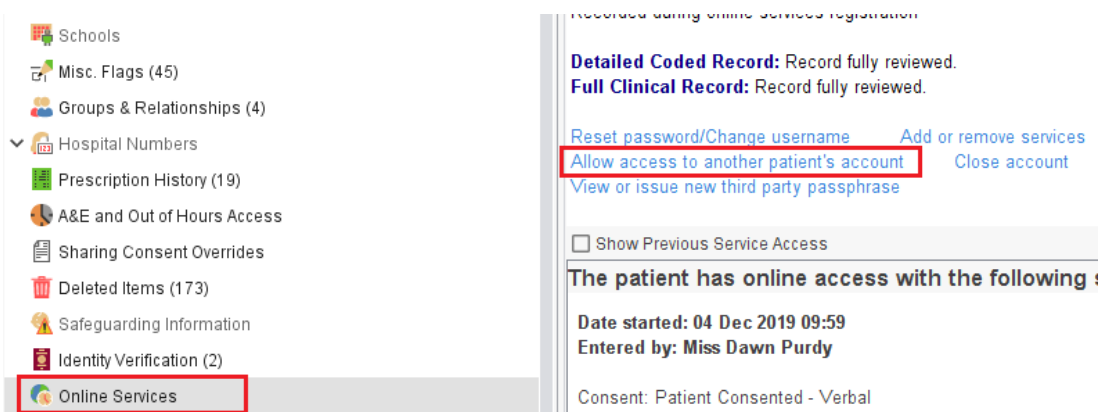
## SystemOnline – Granting Proxy Access to Online Service (Registered Patient)

It is possible to set up a patient's relative, friend or carer to their existing SystemOnline account.

For example a Parent wishes to book appointments, request medication for their children.

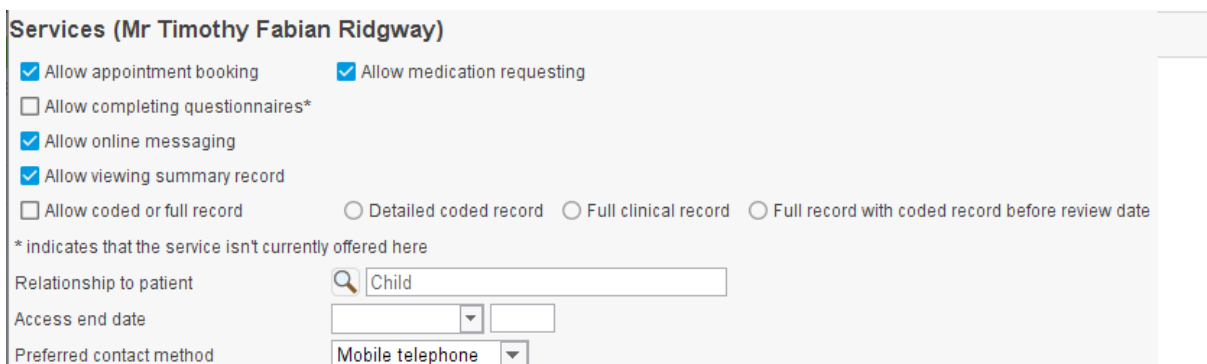
**Note:** Parental Access for children will be removed at the age set via Organisation Preferences, unless they then give explicit consent for Proxy Access to continue until they are 16.

1. **Retrieve** the **patient record** who has an existing SystemOnline account and who will act as proxy to another patient
2. Click **Online Service** from either the Clinical or Admin tree
3. Click **Allow access to another patient's account**



The screenshot shows the SystemOnline interface. On the left, a navigation menu lists various categories, with 'Online Services' highlighted in a red box. On the right, the 'Detailed Coded Record' and 'Full Clinical Record' are shown as fully reviewed. Below this, there are several links: 'Reset password/Change username', 'Add or remove services', 'Allow access to another patient's account' (highlighted in a red box), 'Close account', and 'View or issue new third party passphrase'. A checkbox for 'Show Previous Service Access' is also visible.

4. **Search** for and **select the patient** who will be added to this account for example the child, mother/father to the patient etc.
5. Select the **online services** they wish to have access to
6. Select the **relationship** to the patient and **the preferred method of contact**



The screenshot shows the 'Services (Mr Timothy Fabian Ridgway)' configuration page. It features several checkboxes for service permissions: 'Allow appointment booking' (checked), 'Allow medication requesting' (checked), 'Allow completing questionnaires\*' (unchecked), 'Allow online messaging' (checked), and 'Allow viewing summary record' (checked). There are also radio buttons for 'Allow coded or full record' (unchecked) and three options for record types: 'Detailed coded record', 'Full clinical record', and 'Full record with coded record before review date'. Below these are fields for 'Relationship to patient' (set to 'Child'), 'Access end date' (with a dropdown and input field), and 'Preferred contact method' (set to 'Mobile telephone').

7. Complete the **basis for granting the access** and complete the proof if displayed

Use alternative contact details

Basis for granting access

Patient consent (verbal)     Patient lacks capacity - court order

Patient consent (written)     Patient lacks capacity - power of attorney

Parental responsibility     Patient lacks capacity - patient's best interests

Proof of parent/child relationship

Documentation

Vouching    Vouched by:

Type of vouching     Personal     Information confirmation

Previously recorded

8. Click **Ok** when done

9. A question dialogue may display to inform the patient this patient now has access to their online account. Click **Inform** or **Don't Inform**

10. Continue this process to add more patients to the account

11. The online account will now display who's account they have access to

**This online user has access to the accounts and services listed below:**

**Mr Timothy Fabian Ridgway**

Date started: 20 May 2020 12:59

Entered by: Miss Dawn Purdy

Relationship Type: Child

Consent: Consent Not Needed - Parental Responsibility

Proof: Vouching (information confirmation) by Miss Dawn Purdy [View Attached Images](#)

Appointment booking	✓	Granted
Request medication	✓	Granted
Questionnaires	✗	Not granted

12. If needed an account can be amended or removed, click Amend Service Access or Remove Access

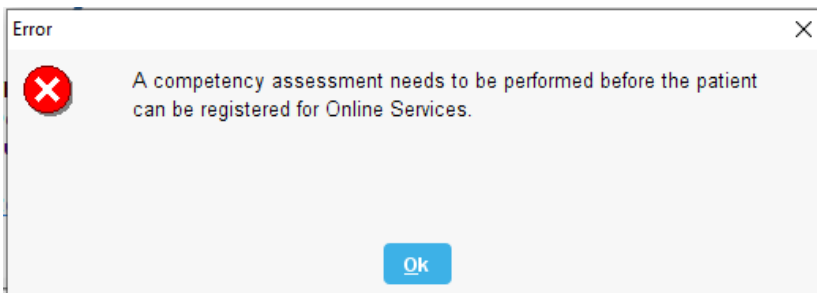
13. **Save** the patient record when complete



## SystemOnline – Granting Access for Patient’s under 16 yrs

Any patient under the age of 16 who requests access to their own SystemOnline account will first need a Gillick Competent test completed by a clinician.

When attempting to register for online services without the appropriate code added the following error message will display:



1. Complete the **Gillick Competency** with the patient and record the following codes in their record:
  - a. Gillick Competent for Consent (XaKIJ or 166891000000107)
  - b. Not Gillick Competent for Consent (XaXLv) or 764871000000106)

**Note:** A patient with **Not Gillick Competent** cannot be registered for their online service account

2. If the patient is **Gillick Competent** and the appropriate code is added to the record, click **Online Services** and register the patient for SystemOnline Services following the practice protocol