

# Good Practice Guidance: Repeat medication ordering using Proxy Access in care homes

## Introduction

Proxy access enables care homes to order monthly repeat medications on behalf of their residents. Proxy access allows nominated care home staff to have access to and manage aspects of residents' Patient Access Services such as ordering medication.

Proxy ordering is possible with EMIS, System One and Microtest medical information systems in GP practice. Before getting started, establish which medical information system the GP practice uses as some systems may not be compatible or have a Patient Access functionality.

## **What is EMIS Proxy?**

- EMIS allows care home staff to have Proxy access on behalf of their residents
- Monthly repeat prescription orders are placed online through Proxy access rather than using handwritten paper ordering and email follow-up
- Care home staff are given access to patientaccess.com where they are able to order residents' medication
- Monthly repeat medication orders are sent directly via patientaccess.com to GPs - bypassing Prescription Clerks so saving time (prescription orders are sent as a task)

## **Benefits of EMIS Proxy**

- Improved data security as care home staff have personal username and password access
- Reduced missing prescriptions as Proxy ordering bypasses Prescription Clerks and gives care home staff an audit trail of prescription order requests
- Fewer queries with repeat monthly medications
- Orders can be more streamlined
- Approved or Rejected prescriptions are highlighted with reasons for non-authorisation

## Implementation

The GP practice is responsible for registering the resident for Proxy Access and allowing access to care home staff. It should be decided which staff at the care home should have authorisation and access to Proxy ordering to order on behalf of residents.

The authorised care home staff should:

- have had medication training and be deemed competent to manage medication including administration
- have experience in ordering medication as part of the monthly cycle
- have up to date information governance (IG) training

There is no limit to how many care home staff members can have access to order medication as long as they are competent to do so, but a minimum of two staff members should have the training and skills to order medication as stated by NICE social care guideline [Managing medicines in care homes recommendation 1.10.3](#). Ensure there are sufficient staff members that are competent to order medication dependent on the size of the care home.

Before commencing, any General Data Protection Regulation (GDPR) requirements should be discussed between the care home and GP surgery; ensure a GPDR data sharing agreement form has been completed. Care Homes may have their own data sharing agreement forms and policies.

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To ensure mandatory information governance (IG) requirements have been met, the care home needs to have completed the Data Security Protection Toolkit (DSPT) and publish at a 'Standards Met' level in the current year.

The care home should have secure email usage in place before commencing with Proxy access. Secure emails can be NHS.net email accounts e.g. [example@nhs.net](mailto:example@nhs.net) or the provider's own email domain if it is accredited to the secure email standard.

For Proxy access, each care home staff member responsible for proxy medication ordering should use a secure email account that is personal to them (for example [yourname@nhs.net](mailto:yourname@nhs.net)) and **not** use a shared email account. A shared email account and shared log-in details would **not** be considered as good information governance, lacking user audit trail information and could breach data security. When registering with Patient Access, the Patient Access system does not allow the individual to register with a shared email address that is already in use, so personal individual care staff email addresses is a requirement.

The responsible care home staff member will be issued with their personal online account, following identity verification at the practice. Authorised individuals should not share their log in details with other staff members.

If an authorised care home staff member leaves, it is the responsibility of the care home registered manager/ deputy manager to inform the GP practice within 48 hours of the staff member leaving. This can be extended to 72 hours if necessary, for example over a weekend or Bank Holiday. The EMIS Proxy Staff Access Application Form should be used to notify the practice. This should be sent via [nhs.net](mailto:nhs.net) or other secure email to the Practice Manager, or in person if needed.

The care home staff member should register for an online Patient Access user account once the linkage key and account ID have been sent. **This only needs to be done once.**

Refer to the EMIS Patient Access user guide for care home staff for instructions on how to register and link the account.

Note that once the details have been completed onto the registration page, the care home staff member should choose an appropriate password and memorable word. These must **not** be shared with other staff members.

The care home can retain a copy of the medication orders requested via Patient Access by printing a PDF of the medication orders placed. The care home staff can use this for cross-checking against the MAR charts and dispensed items upon receipt to ensure they have received all orders correctly.

If some medication does not appear on Patient Access, it may be because it is not on the repeat list. Liaise with the clinical lead at the GP Practice, the PCN pharmacist or practice pharmacist to tidy up the repeat list.

### Patient consent

Consent must be confirmed by the resident to allow care home staff to order on their behalf using proxy access.

If the resident does not have capacity, decisions of those holding Lasting Power of Attorney (LPA) for health and welfare or Court Appointed Deputies for a resident should be sought.

If there is no LPA for health and welfare or Court Appointed Deputies, then online access may be permitted following discussion with the resident's family/next of kin and care home staff, if the GP considers this to be in the resident's best interests.

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When consent to proxy access is obtained it should be made clear to the resident or their next of kin that the care home staff only have the option for **online repeat medication ordering management and messages**.

The resident, next of kin or LPA should sign the relevant section of the resident consent form and return this to the care home to share with the resident's GP practice. Scanned copies of completed resident consent forms can also be shared using a secure email. The resident, next of kin or LPA can keep a copy of the consent form if they wish.

Discussion with the resident about the benefits and risks of allowing proxy access, their consent or legal justification if they lack capacity must be clearly documented in the medical records and care plan.

### Record keeping/ Medicines Policy

- The care home should ensure there is a written policy for medication ordering via Proxy access.
- It should be clearly documented in the residents' records which staff member is responsible for ordering each resident's medication via proxy access.
- The policy should include details of how to manage a breach of confidentiality or misuse of proxy access. Details of IG training and how often it should be refreshed should also be included.
- There must be a 'back-up' process in place if Patient Access cannot be accessed, for example if computer systems are down. This could be included in the plan for business continuity which can also include additions and removal of staff log-ins, staff training and review of processes.
- The care home must inform the GP practice of any changes in staff involved in proxy ordering of medication such as when a staff member leaves or is newly employed by the care home, so that login details/access is amended. The care home staff proxy access application form should be completed and identification confirmed by the GP practice if required.
- The GP practice should be notified about any changes relating to residents' status, such as:
  - Resident is in hospital
  - Resident moved to another care provider

### Interim prescription/ mid-cycle changes

Mid-cycle requests for unusual quantities may be requested to complete the current cycle for the following reasons:

- to synchronise medication quantities for 28 day cycle ordering
- for a new resident
- when a new medication is prescribed for the first time mid cycle
- for medicines which have been dropped, spilled or refused by the resident
- where additional quantities are required due to increased usage (e.g. analgesics) or dose increased mid cycle.

Mid-cycle requests can be made using the online ordering system. The quantity needed to complete the medication 28 day cycle can be typed in the message box. It is best practice for care home staff to request quantities of medication to complete the cycle in addition to a further 28 days' supply on the same day. This will save time for the care home chasing up with the GP practice and the community pharmacy to dispense the medication. Speak to the GP practice about how they would like this communicated.

Please refer to Appendix 1 for Proxy Access Frequently Asked Questions.

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## References and other information

- The Data Security and Protection Toolkit: [The Data Security and Protection Toolkit - Digital Social Care](#)
- Patient Access: <https://www.patientaccess.com/>
- Secure email: list of accredited organisations: <https://digital.nhs.uk/services/nhsmail/the-secure-email-standard>
- Ordering medication using Proxy access: Guidance for care homes, GP practices and community pharmacies: [NHS England » Ordering medication using proxy access: Guidance for care homes, GP practices and community pharmacies](#)

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**Appendix 1**

## Proxy Access FAQ's

Question	Answer
Is there a username and password for each resident?	No. Each individual care home staff member has a log-in. Staff members' accounts have names of residents that reside at the care home so they can select which resident to order for.
Can we have a log-in per unit?	No. Each individual staff member must have a log-in, due to data security reasons
Can log-in details be shared with other staff members if I am on leave?	No. Log-in details should be individual to the particular staff member and should not be shared for data protection purposes.
What if a staff member is sick and not able to order?	Ensure a <u>minimum</u> of two staff members are trained and competent to order medicines. Consider the size of the care home, number of units/ floors to ensure sufficient staff members have log-ins to cover for leave and sickness.
Does the named care home staff member need an NHS.mail account for Proxy access?	The individual care home staff must have their own NHS.mail account or a secure email account. A shared mailbox is not advised for Proxy ordering.
None of our residents have capacity. Can we still order via Proxy access?	Yes. If there is no Lasting Power of Attorney health & welfare/ court appointed deputy then MCA assessment and Best interest's decisions need to be made. The next of kin should be contacted so that they are involved in any best interest decision making.
Is there a step by step guide on how to order repeat medication via Patient Access?	Yes. D11- EMIS Web ordering using proxy access can be downloaded on this site <a href="#">NHS England » List of downloadable resources used in this guidance</a>
How can I order medications that are acute, started by the hospital or not on the repeat list?	These can be requested via secure email to the GP practice or by phone if urgent. Proxy access should only be used for repeat medication ordering.
If an acute medication is being used more frequently, how can this be ordered on repeat via proxy access?	If an acute medication is being used more frequently, then a medication review should be conducted by the GP, PCN Pharmacist or MOCH team to understand the reason for the increased usage. It may then be added to repeat medications if appropriate.
How do I use Proxy ordering to request odd quantities, and can this be synchronised with the 28-day cycle?	Clarify how the GP practice want this communicated before proceeding to set up of EMIS Proxy. This can be requested via the message box on Patient Access or requested via the usual communication routes to the GP practice (phone or email).

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How do I chase up prescriptions that are not ordered?	Patient Access shows which medication has been approved and which has been rejected. Other communications should be escalated to the GP practice via the usual method (phone or email).
We use E-MAR's (electronic MAR charts) at the home. Is this linked with Proxy ordering?	Proxy access allows care homes to order medication online and it is linked to the GP system. It does not allow the recording of any medication administration and does not affect the recording of medication administration on any electronic MAR chart system.
Can we ask the supplying pharmacy to stop sending copies of what has been ordered?	Before Proxy access technology, supplying pharmacies would send the <u>prescription tokens</u> to the care home early so that care staff know what medication has been issued. With Proxy, it is possible to see what has been ordered via the Proxy access system. It is good practice that the pharmacy sends the <u>dispensing token</u> with the dispensed items so that the care home can check if the correct medication has been dispensed by the pharmacy and is what is expected.
How does the supplying Pharmacy know what has been ordered via Proxy?	It is good practice to still send the copies of the MAR chart backing sheets, or a copy of the prescription request form to the community pharmacy. Patient Access can also generate a PDF of medication orders generated which can be printed.
How do I still order the medications if the computer crashes or Wi-Fi goes down?	Ensure the Proxy ordering policy has a process for business continuity if systems fail. A suggestion could be to revert back to paper ordering system until technology issues are corrected. Ensure the GP practice is informed if there are problems with accessing Patient Access to make them aware.
Can I see residents blood test results on Patient Access?	This guidance is for repeat medication ordering only. We do not advise that access to blood results is given at this time as this would need the care home staff to complete other training and the care home to have other policies and processes in place for clinical safety and IG purposes.

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