

# Online Ordering (& EPS) Guide for Care Homes & GP Practices with SystemOne

Prepared by Care Home Advice Pharmacy Service January 2017

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## Introduction

This guide is for GP practices using SystmOne and care homes to enable and manage online ordering of prescriptions by care home staff so that the GP practice can enable EPS (electronic prescribing) for their care home residents. This guide does not cover areas around the setup of EPS as this will have been covered during the Go Live process with the practice and it does not differ for care home residents.

## 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.

## 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

**All repeat templates need to be made 'irregular issued repeat' to allow for online ordering in week 2 of the medication cycle.** The system will automatically prevent online ordering of medication more than 7 days in advance of the calculated next due date, however, care homes will need to start their ordering process almost 3 weeks in advance. Marking a repeat as irregular will remove this calculation. GP practices should be aware that this will also remove the prompt when issuing a medication early and that the care home will be able to order the repeat medication as often as they wish without any prompt to the person issuing the repeat template that this could be too early or too frequent.

**The staff member issuing the repeat templates must check that the repeat is not being issued too frequently.**

There is no way for the system to default to 'irregular issued repeat' for care home patients and so the GP practice must agree a process for marking new medications added to repeat as irregular. Will the prescriber be responsible for this? Will the staff members who usually issue the care home repeat prescriptions be responsible for monitoring this? If this is not kept up to date the care home will be in a position where they are unable to order their repeat medication online.

Amend Repeat Template

Mr Timmy Test-TestPatient 10 May 2010 (6 y 2 m) M  
12 St. Marys Paddock, Wellingborough NN8 1HJ  
Test Patient, The Parks Medical Practice

Medication start: Wed 17 Apr 2013

Drug prescribed: Clenil Modulite 50micrograms/dose inhaler (Chiesi Ltd)

Script type:  NHS Issue  Private Issue  Instalment Dispensed Issue

Dose: two puffs twice daily

Total quantity:  Number  Packs 1 pack(s) of 200 dose inhaler £3.70  Include ended  Free Text

Script notes: Presets

Administrative notes: Presets

Issue duration: 50 Days

Use review date 17/10/2013  Synchronise all review dates to this

Use maximum issues

Patient can initiate issues

Irregularly issued template

Repeat template can be reissued

Link to Read code(s): No linked Read codes

Record that a medication review has been performed

Patient-Specific Warnings

Sensitivities (not checked):  
! Allergy to grass pollen

Precautions:  
! Children under 12 years, Major risk factors for decreased bone mineral content

## 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.

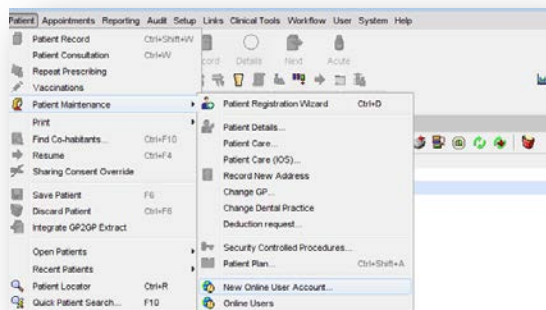
## Setting up Online Access (GP Practice)

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. Adding an Online User

Use the care home staff member information provided on the consent forms.

- **Patient – Patient Maintenance – New Online User Account**



- When searching by name the staff member's name should be **CareHome StaffName**. This will ensure that the staff member is not found on the spine and when searching for online users will group the care home staff members together.

- After clicking on 'Search' it is important that the 'Not Found' option is always selected, as it is possible to find actual patients on the spine.
- Enter the following details:
  - Name
  - Gender
  - DOB
  - Contact Number (this should be the care home's contact number)
  - Add care home address by clicking on the stamp button
- Click OK
- Enter the 'Identity Verification' details – a note should be made that this is part of the online ordering set up for the care home.
- Record email and contact number details.
- The system will automatically record the username (which can be amended to something simpler) and password. This can be given to the staff member by printout or email.

## 2. Adding current care home patients

Now add the current patients at the home (from the completed consent paperwork) to the proxy user just created by clicking the option below.

## Proxy Access

Allow this Online User to Access a Patient's Account

- Search for the patient you want to add.

NHS Number	First Name	Middle Names	Surname	K...	DOB	I...	Sex	House Na...	House ...	Road	Postcode	Teleph
	Test		Testdemoei...		20 Nov 1961		F	9999		Summerhouse Road	NN3 6BJ	07794
	Test		Testdemoei...		20 Nov 1961		F	9999		Summerhouse Road	NN3 6BJ	

- Select services for proxy access (this guide only covers the use of online medication requesting).
- Relationship to patient (it is suggested to use the 'care provider' option)
- Basis for granting access. If added a patient from the bulk consent form then choose the best interest option and add a note that is as per online ordering consent paperwork.

**Services (Miss Test Testdemoeight)**

Allow appointment booking     Allow ordering medication  
 Allow viewing test results     Allow completing questionnaires  
 Allow viewing summary record     Allow viewing detailed record

Relationship to patient

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

Best interests confirmed by

**Proxy Access**

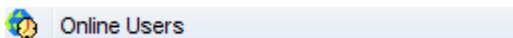
Allow this Online User to Access a Patient's Account

- Continue this until all residents at the care home have been added to the proxy user. Once completed click 'OK' at the top of the registration screen and save the online user record (as you would a patients record)

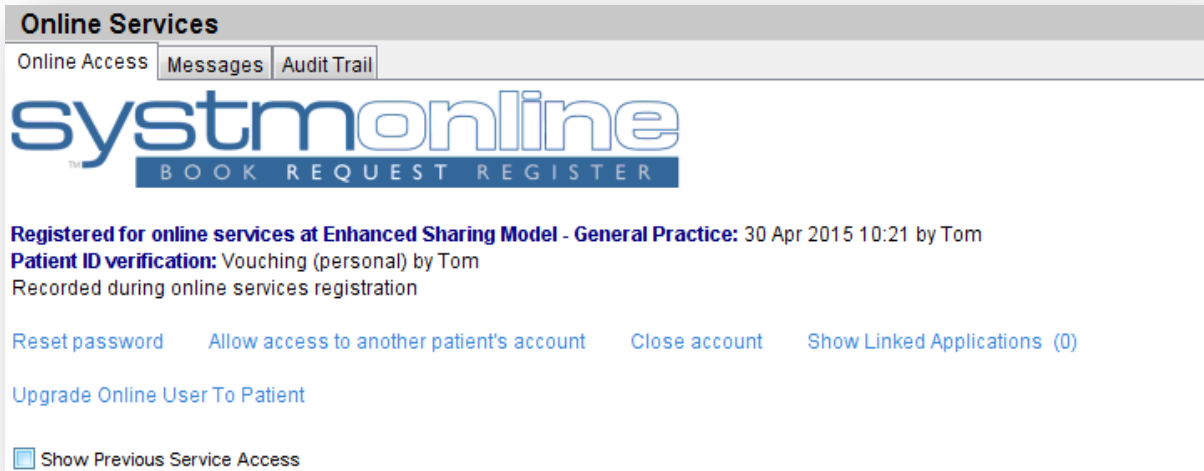
### 3. Online Proxy User – adding new patients and changing passwords

Once a proxy user has been set up there are a number of further actions that will be required.

#### To retrieve the Proxy User record:

- Select Patient – Patient Maintenance – Online Users  

- Find the proxy user. It is useful to filter by NHS number so that all the Proxy Users (that will have no NHS Number) appear at the top.

- When the proxy users record is retrieved it should default to the 'Online Services' screen. If it does not then this screen will need to be located (usually at the bottom of the administrative tree).



**'Reset Password'** – will reset the Proxy User's password.

**'Allow access to another patients account'** - choose this option and follow the set up steps above to add patients. This option will be required when there are new residents to the care home. The care home must submit the consent paperwork before setting up online access.

**'Close Account'** - will revoke the proxy users access. The care home must inform the GP practice when a staff member leaves employment at the care home so that their access to the patient's records can be removed.



## 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:
<b>Item for discussion</b>	<b>Details and concerns</b>
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

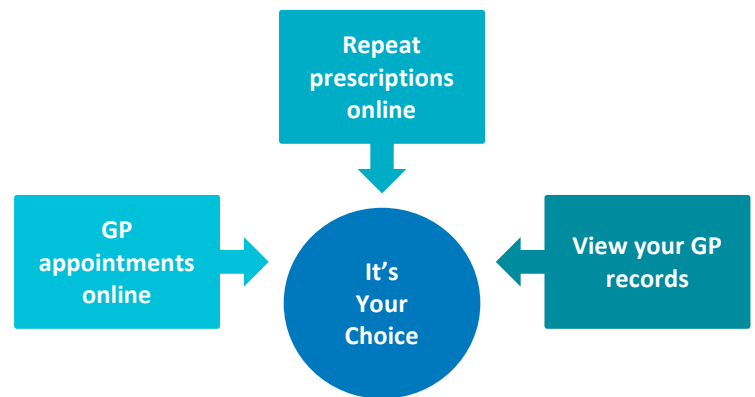
With online access authorised staff at **\*\*CARE HOME\*\*** can:

- 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.



### 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>

## 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**