

Montgomery-House Surgery

Consent to Proxy Access to medical records

Some patients would like to give someone else access to their medical records or GP Online Services account. It may be a family member, a close friend, or a carer, who can use it to book appointments or order repeat prescriptions on their behalf or to help them manage their healthcare. This is called proxy access.

Family and close friends are the commonest proxies. They may live a distance away and can use proxy access to keep up to date with the patient's healthcare so that they know when their help is needed.

Patients who are losing capacity may not be able to clearly remember consultations with their health professionals, test results, management plans or medication changes. Proxy access improves communication between carers and health professionals, not just in the practice, but also hospital departments if the proxy has access to recent clinical correspondence.

Anyone with capacity to make an informed decision about proxy access may give consent for the practice to give their representative their own personal login credentials to access the patient's GP Online Services account.

If the patient lacks capacity to give informed consent, proxy access may still be given to a family member or carer if they have a power of attorney for health and welfare, are a court appointed deputy or, if the GP judges it to be in the patient's best interest. This third option is usually used where a patient made an advance decision about future proxy access, which was recorded in anticipation of future loss of capacity. This may form part of normal advance planning for dementia or end of life care.

The practice may decline or withdraw formal proxy access in the patient's best interests.

Signing up a proxy for access to medical records

Before providing proxy access login credentials to anyone, we must:

- Obtain a completed proxy access consent form
- Verify the identity of the patient giving consent
- Establish the level of access that the patient wants the proxy to have
- Confirm that the patient has given informed consent to have access to their online services to the proxy, or where the patient is not able to consent, there is another legal justification for providing proxy access
- Seek assurance that the patient is not being coerced to agree to proxy access unwillingly

Levels of proxy access

You have a choice about what information your proxy will be able to access. The options are:

- Online appointment booking and cancelling
- Online prescription management
- Access to health records through Online Access
- Telephone or in person discussions with clinicians about the patient

Proxy access without the consent of the patient

There are circumstances where we may legitimately authorise proxy access without the patient's consent and in all these cases the decision will be taken by the patient's usual GP after a full review of the application.

- Where a patient has been assessed as lacking capacity to make a decision on granting proxy access and the applicant for proxy access has registered a lasting power of attorney for health and welfare with the Office of the Public Guardian
- Where a patient has been assessed as lacking capacity to make a decision on granting proxy access and the applicant is a Court Appointed Deputy on behalf of the patient
- Where a patient has been assessed as lacking capacity to make a decision on granting proxy access and in accordance with the Mental Capacity Act 2005 code of practice the GP considers it in the patient's best interests to grant the requested access to the applicant
- Where a patient has been assessed as lacking capacity to make a decision on granting proxy access but there is a record of the patient having made an advance decision that the individual seeking proxy access may act as their proxy for GP Online Services.
- Where a patient is a child before their 11th birthday who is not competent (for example a baby) to make a decision on granting proxy access
- If the applicant is a health professional who has a legitimate relationship with the patient for providing direct care to them, such as a nurse working in a nursing home

Planning for future loss of capacity

Loss of capacity to decide whether to consent to proxy access can be anticipated in some clinical scenarios. Dementia and approaching end of life care are two examples where it can be helpful to discuss the value of future proxy access. Understanding your preferences about it is an important part of advanced care planning. A clear record of your choice can be very helpful if a decision to allow proxy access has to be made after you have lost the capacity to consent.

ID

In order that we can protect our patients' medical records, we need to verify the identity of our patient, we will do this either by verifying photo ID in person, or by calling the patient to confirm their identity and consent.

Photo ID

We can accept any of the following:

- Current driving licence
- Any current passport
- UK Residence Permit
- Rough sleepers' identity badge

Montgomery-House Surgery

Consent to proxy access to medical records

Please read the accompanying information before completing all sections of this form and returning it to a member of our Patient Services Team.

We will process your application within 14 days.

If we have not verified photo ID in person at the surgery, we will need to verify the agreement of the patient independently, usually by calling them on a telephone number we already hold for them.

Note: If the patient does not have capacity to consent to grant proxy access and proxy access is considered by the practice to be in the patient's best interest Section 1 of this form may be omitted.

Section 1

I,..... (patient), give permission to Montgomery-House Surgery to give the following representative/s proxy access to the GP services as indicated below in Section 2.

- 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
- I have read and understand the information provided by the practice

Signature of patient	Date
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Section 2

1. Online appointment booking	<input type="checkbox"/>
2. Online prescription management	<input type="checkbox"/>
3. Accessing my medical record through Online Access	<input type="checkbox"/>
4. Telephone or in person discussion with clinicians only	<input type="checkbox"/>

Section 3

I/ we..... (representative/s) wish to have access to the services ticked in the box above for (patient).

I/we understand my/our responsibility for safeguarding sensitive medical information and I/we understand and agree that:

1. I/we have read and understood the information provided by the practice and agree that I will treat the patient information as confidential	<input type="checkbox"/>
2. I/we will be responsible for the security of the information that I/we see or download	<input type="checkbox"/>

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	<input type="checkbox"/>
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	<input type="checkbox"/>

Signature/s of representative/s	Date
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Section 4

The patient

(This is the person whose records are being accessed)

Patient's full name	
Date of birth	
Home telephone number	
Mobile telephone number	
Address	
Email	

The representative/s

(The people seeking proxy access to the patient's records)

Representatives full name	Representatives full name
Date of birth	Date of birth
Home telephone number	Home telephone number
Mobile telephone number	Mobile telephone number
Address	Address
Email	Email
Relationship to patient	Relationship to patient

For practice use only

Patient NHS number		Patient EMIS number
Identity verified by (PS initials)	Date	Method Photo ID <input type="checkbox"/> Telephone verification <input type="checkbox"/>
Proxy access authorised by (GP initials)		Date
GP notes		
Date account created		
Date passphrase sent		
Level of record access enabled Online appointment booking <input type="checkbox"/> Prescription management <input type="checkbox"/> Full Online Access <input type="checkbox"/> Telephone discussion with clinicians <input type="checkbox"/>		