

Granting proxy access and maintaining an accurate and up-to-date proxy list helps ensure efficient communication and maintenance when caring for patients.

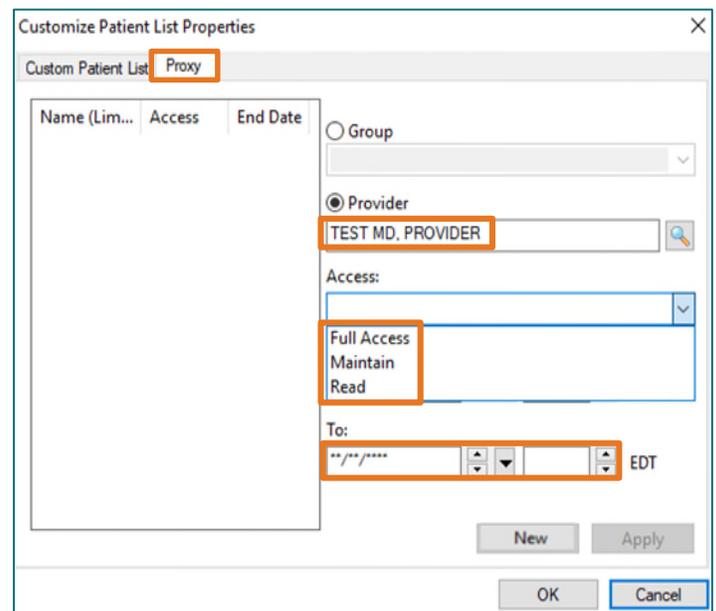
Assigning Custom Patient List Proxy Access

➤ Navigate to the **Patient List**  on the toolbar.

➤ Click the **Properties** icon  for the desired **Custom List** and select the **Proxy** tab.

➤ Click **New**.

- Enter the name of the user to whom access is being granted in the **Provider** field.
- Select an access level option from the **Access** dropdown:
 - **Full Access** – Allows user to add/remove patients, add users, and delete the list.
 - The list creator has **Full Access** by default.
 - **Maintain** – Allows user to add/remove patients.
 - **Read** – Allows user to view the patient list.



- Enter a future date/time in **To:** field in which the provider should be granted access.

➤ Click **Apply**.

- Repeat this process for each user.

➤ Click **OK** once finished.

Updating Custom Patient List Proxy Access

➤ From the same **Proxy** tab mentioned above, select the user who needs to be updated.

- Make any necessary changes.

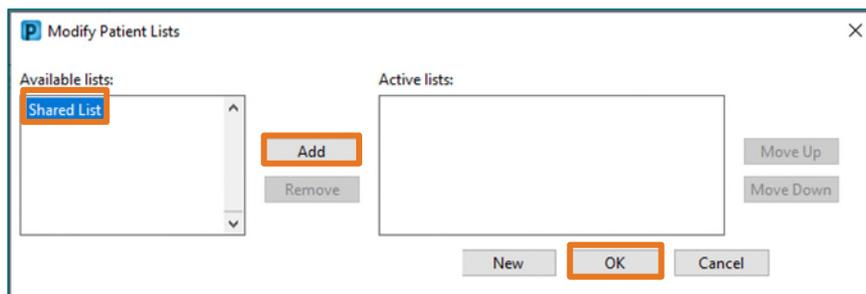
➤ Click **Apply**.

➤ Click **OK**.

NOTE: Once a user has been added to a list, he/she cannot be removed. To revoke access, set the "To:" date for that user to the last date access should be granted.

Adding a Shared Patient List

- The receiving user must navigate to the **Patient List**  on the toolbar.
- Click the **List Maintenance** icon  in the upper left of the **Patient List** window.
 - Select the shared list(s) from the **Available Lists** pane and move it into the **Active Lists** pane by clicking the **Add** button.
 - Click **OK** to close the **List Maintenance** window.
- Click the **Minutes Ago** button  to refresh.
 - The new list will now display in Patient List.



Custom Proxy List Access Best Practices

- Select an additional administrative user to be granted **Full Access** to the list for access and privilege updates.
- **Physicians/PAs/NPs** should only be granted **Maintain** access to mitigate the risk of accidental list deletion.
- Access privileges should be regularly reviewed for necessary additions or revocations.