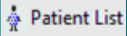

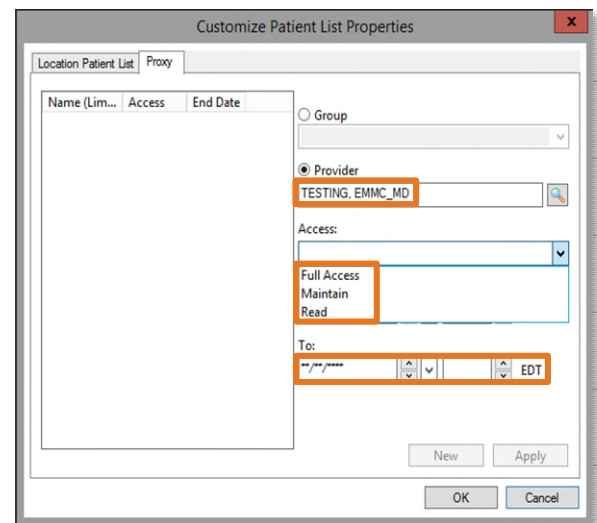
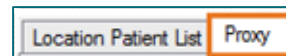


Granting proxy access and maintaining an accurate and up-to-date proxy list helps ensure efficient communication and maintenance when caring for patients.

## Assigning 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** and 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.
- Select **Apply**. Repeat this process for each user. When finished click **OK**.

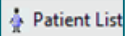



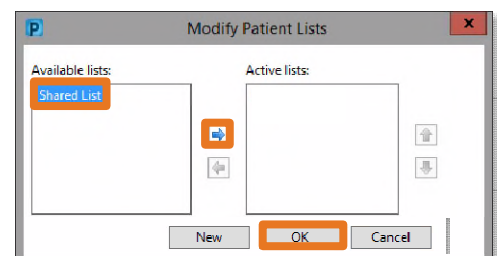
## Updating Patient List Proxy Access

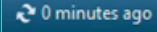
- From the same **Proxy** tab mentioned above, select the user who needs to be updated. Make any necessary changes, select **Apply**, and then select **OK**.

**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 right arrow.
  - Click **OK** to close the **List Maintenance** window.



- Click the **Minutes Ago** button  to refresh.
  - The new list will now display in Patient List.

### **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/ANPs** 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.