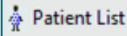

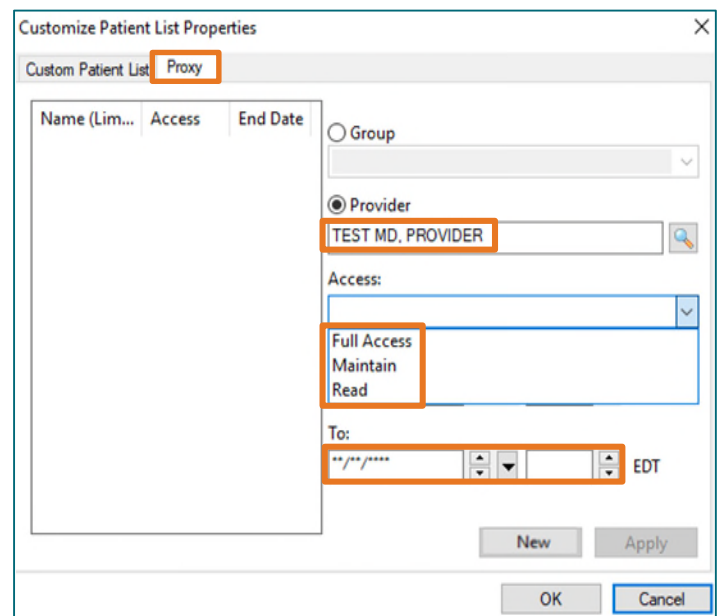


Granting proxy access and maintaining an accurate and up-to-date proxy list helps ensure efficient communication and maintenance when caring for patients.

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.



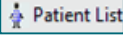

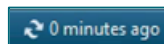
The screenshot shows the 'Customize Patient List Properties' dialog box with the 'Proxy' tab selected. The 'Custom Patient List' dropdown is set to 'Proxy'. The 'Name (Lim...)' field is empty. The 'Access' dropdown is set to 'Full Access'. The 'To:' field is set to 'no proxy'. The 'Provider' field is set to 'TEST MD. PROVIDER'. The 'Access' dropdown is set to 'Full Access'. The 'To:' field is set to 'no proxy'. The 'Provider' field is set to 'TEST MD. PROVIDER'. The 'Access' dropdown is set to 'Full Access'. The 'To:' field is set to 'no proxy'.

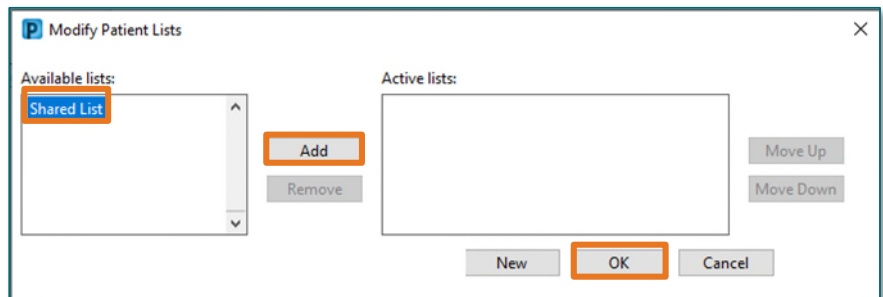
Updating Custom Patient List Proxy Access

- 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.