


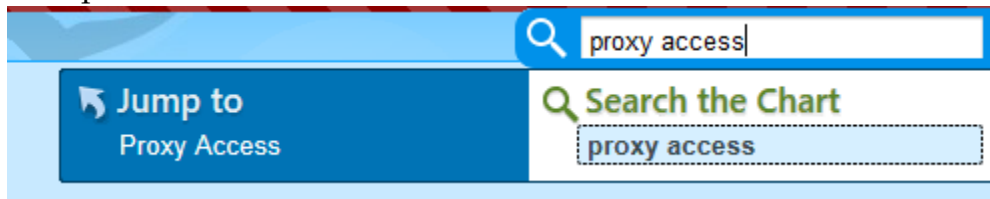
## MyChart Proxy Access Tip Sheet: Adult

 How to set up a Proxy Access between two adults from the same organization.

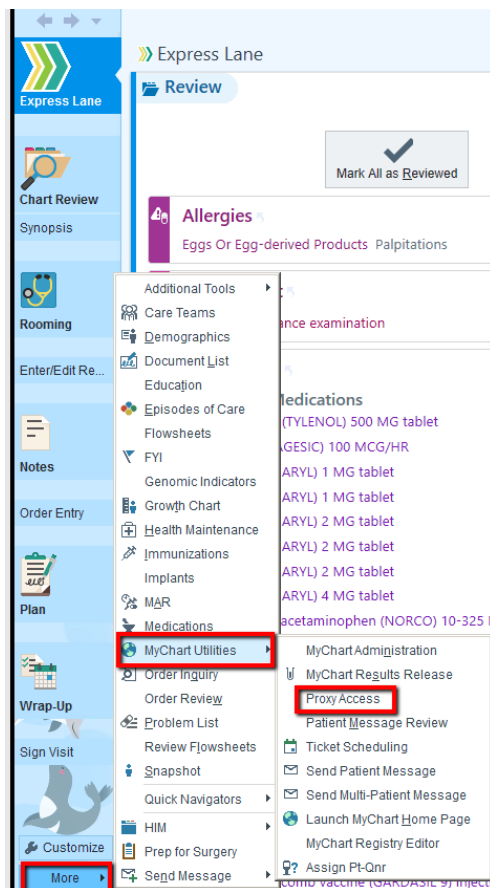
Proxy access is granted using the proxy access activity.

Adult A is the patient and Adult B is being granted proxy access.

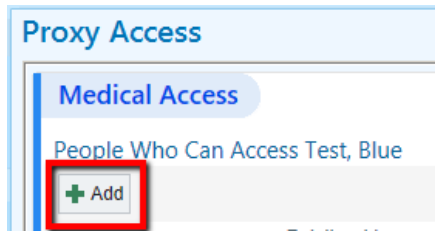
- 1) Log into hyperspace. Type “Proxy Access” in chart search. Then select the “Adult A” patient. Proxy access activity will open.



- 2) Another way is to access this activity is by opening the “Adult A” patient chart, going to **More Activities**, selecting **MyChart Utilities** and then selecting **Proxy Access**.



- 3) Use the "ADD" button to give proxy access. Click on "Proxy Look up" button and select "PATIENT" option. Then search for Adult B. Choose Adult B.



The screenshot shows the "Grant Online Access to Test,Blue" form. The "Proxy name" field contains "Proxy Lookup" and is marked with a red box and the number "1". The "Relation type" dropdown is open, showing "Patient" (marked with a red box and the number "2") and "Non-Patient" options. The form also includes fields for "Start date" and "End date", and a "Cancel" button.

- 4) From the Relationship Type List, choose the appropriate relationship type. ( eg Adult accessing Adult : Scheduling & Messaging)

The screenshot shows the "Grant Online Access to Test,Blue" form with the "Relation type" dropdown open. The "Category Select" dropdown is visible, showing a list of relationship types. The option "Adult accessing Adult: Scheduling & Messaging" is selected and highlighted in blue.

- 5) In the "Comments" enter the relationship between the two adults.

The screenshot shows the "Grant Online Access to Test,Colon" form. The "Proxy name" field contains "Test,Onefour". The "Relation type" dropdown is set to "Adult accessing Adult: Scheduling & Messaging". The "Start date" field contains "8/16/2018". The "Access class" dropdown is set to "MYCHART ADULT-ADULT SCHEDULING & MESSAGING". The "Comments" field contains the text "Spouse". The form also includes "Accept" and "Cancel" buttons.



## How to set up a Proxy Access between two adults from different organization

Adult A is the patient in Prime and Adult B who is not a patient in Prime is being granted proxy access

- 1) Log into hyperspace. Type “**Proxy Access**” in chart search. Then select the “Adult A” patient. Proxy access activity will open.
- 2) Another way to access this activity is by opening the “Adult A” patient chart, going to **More Activities**, selecting **MyChart Utilities** and then selecting **Proxy Access**.
- 3) Use the “**ADD**” button to give proxy access. Click on “**Proxy Look up**” button and select “**Non-Patient**” option.

Grant Online Access to Test,Blue

Proxy name:  Proxy Lookup **1**

Relation type: **Select Proxy Type**

You may select either a patient or a non-patient to have online access to the medical record of Test,Blue. Please click on the appropriate button below to select the type of person you wish to add. If you are uncertain, please select "Patient".

Start date:

End date:

Allow this medical record to be viewed by a:

Patient Non-Patient **2** Cancel

- 4) In the “**Web Account Search**” window, enter Adult B’s name in **Last name, First name** format. Click the “**New**” button if accessing for first time. If not new click on “**Search**”. Enter the name of the proxy and select them.

Web Account Search

Name:

**i** To select a patient access record, enter the name of the person above and click the "Search" button below. Please enter names in Last, First format.


New Search Cancel



- 5) If new, then in the “**Web Account Details**” window, fill in Adult B’s demographic information. Click “**Accept**”. If account is already existing, then select and click accept

**Web Account Details**

The proxy will need to verify the required information on this form when they sign up for MyChart by Prime Healthcare.

**Personal Information**


Name:  SSN:  


Birth date:   Sex:  


**Address Information**

Address:


City (or ZIP):


State:  ZIP:  


County:  


Country:  

**Contact Information**

Home phone:  

Mobile phone:  


Work phone:  

Email:  

- 6) Return to "Grant online access form". In the Relationship Type List, choose the appropriate relationship type. (eg Adult accessing Adult : Scheduling & Messaging)
- 7) In the "Comments" enter the relationship between the two adults.
- 8) Note: If it's a new account for Adult B we have to send a letter with Activation code so that Adult B is able to login to MyChart to access Adult A's Chart. Note that the "Print first time activation instructions" is checked.

**Grant Online Access to Test,Colon**


Proxy name:

Relation type:  

How is the proxy related to the patient?

Start date:

When should the proxy receive access to the patient's information?

End date:  

When should the proxy no longer have access to the patient's information?

Access class:

What level of access should the proxy have to the patient's information?

Profile:

What profile should the proxy have when accessing the patient's information?

Comments:

Print first-time activation instructions

- 9) Click PCP to add Adult B's pcp automatically for the letter to be sent to him.

From To Profile

**Automatic Selection for Test,Colon** ✕

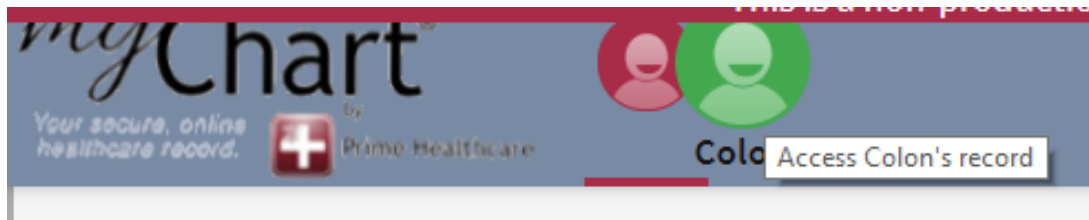
Provider:  PCP ▾

Department:

10) Click "New" to generate a new letter with activation code.

 **How to view a proxy's chart in MyChart**

Proxy users Logging into MyChart see bubbles for each subject whom they have access to. To access a subject's chart just click on the account bubble and their chart will open.



If it's a new account, then the user should use the activation code from the letter printed at clinic. They need to sign up in Mychart, enter their details and SSN and then they can log in.