

# GRANT PROXY TO A PATIENT LIST

1. Select the **Patient List** tab to be proxied (shared).

2. Click the **Properties** icon. 

3. The **Customize Patient List Properties** window displays. Click the **Proxy** tab.

4. Click **New**. Select the group or individual provider who will accept the proxied list. The **Group** listing is in alphabetical order. If typing the last name in the **Provider** field results in multiple matches, click the **Binoculars** icon to select the correct provider.

5. Select the type of access to share with the provider or group in the **Access** field. **Full Access** grants all privileges. **Maintain** allows the provider to work within the list, including adding or removing patients from the proxied list. **Read** provides a snap shot view with printing only.

6. Enter the time frame the proxy will be granted in the **From** and **To** fields. Select **Apply** and then **OK**.

7. To access the proxied list, the provider must click the **Wrench** icon and move the proxied list from **Available lists** to **Active lists** in the Modify Patient Lists window.

**NOTE:** The provider's name appears in the Provider window with access type and time frame. To remove a provider prior to the time the granted access will expire, click on the provider's name to highlight it and change the proxy date. If the access expires, the proxy also expires. If the **To** time frame is not completed, the list is available to the proxied provider indefinitely.

