Add, Modify, or Remove Proxy Access to a Patient's Portal Account

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About

A Proxy is a person who is authorized to view a medical record. A Proxy can have access to the medical record indefinitely or expire by a specified date. A Proxy may be assigned, for example, in cases of child welfare or when a patient has reached the Minor Age Limit set on the Practice Portal. For a comprehensive look at what occurs when the patient reaches the Minor Age Limit, click **here**.

Add a Proxy in the Practice Portal

1. Navigate to Patient Administration: **Navigation Panel > Patient Administration**.
2. Click the **Account** button in the Search Patients panel.
3. Enter information in one of the search fields: Last name, First name or Date of Birth.
4. Click the **Search by** drop-down menu and select a search option.
5. Click the **Search** button.
6. Click the **Select** button in the Actions column or the Patient Name to display the Patient Account page.
7. Click the Actions drop-down menu and select **Add Proxy**.
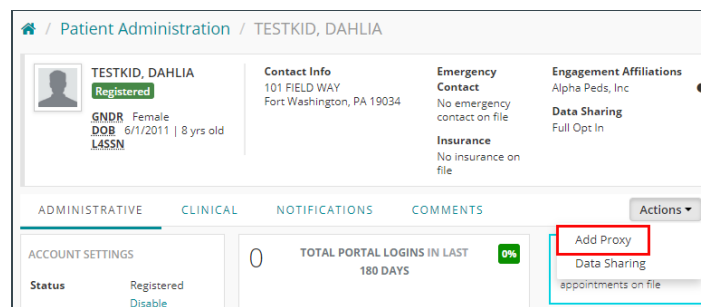
8. Complete the Add Proxy Association information:

   a. **First Name**: Enter the First Name of the proxy.
   b. **Last Name**: Enter the Last Name of the proxy.
   c. **Gender**: Select the Male or Female radio button.
   d. **DOB**: Select a Month, Day and Year from the drop-down menus to select the date of birth of the proxy.
   e. **Cell Phone**: Enter the Cell Phone Number.
   f. **Email**: Enter the Email Account for the proxy.
   g. **Relationship**: Select a Relationship of the proxy to the patient from the drop-down menu.
   h. **Proxy End Date** (*Optional*): Enter the End Date the proxy will have access to the patient information on the Patient Portal. **Note**: Each Proxy's End Date must be handled individually.
   i. Select the checkbox to confirm the authorization has been approved.

9. Click the **Submit** button. An invitation is sent to the email address of the Proxy Association. The Proxy will accept or reject the access.

Demo Video: Add a Proxy in the Practice Portal

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Proxy Steps to Accept or Reject Portal Access

In the Proxy invitation email, the recipient has the option to accept or reject access:
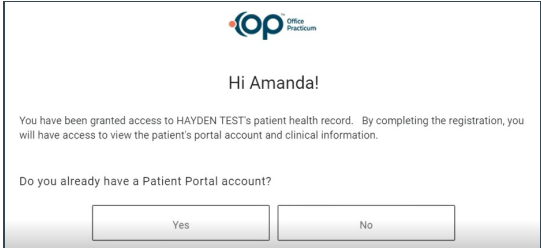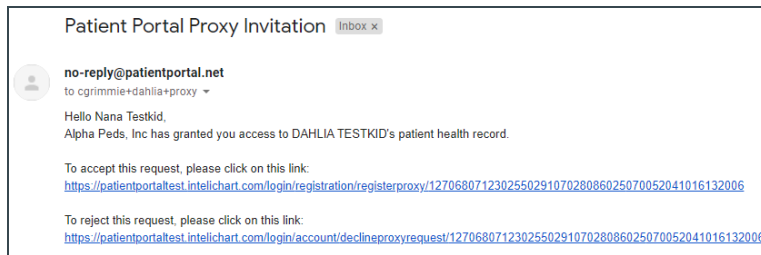

- **Accept access**: The Proxy will be taken to the Create an Account tab of the OP Patient Portal where he/she will complete the registration and identity verification process.
- **Reject access**: The Proxy will not be given access to the patient's records.

Demo Video: Proxy Steps to Accept Portal Access

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Important: If a parent/guardian has an established Patient Portal account, it is important that they select the **Yes** button after clicking the link in the email invitation.

Modify Proxy Access

When a Proxy accepts the invitation they will receive full access to the patient record. There may be circumstances where the patient record should be limited in what the Proxy may do or view. Below you will find information on how to change Proxy Access and what information is available at each level.

1. Navigate to Patient Administration: **Navigation Panel > Patient Administration**.
2. Click the **Account** button in the Search Patients panel.
3. Enter information in one of the search fields: Last name, First name or Date of Birth.
4. Click the **Search by** drop-down menu and select a search option.
5. Click the **Search** button.
6. Click the **Select** button in the Actions column or the Patient Name to display the Patient Account page.
7. Locate the Associations section, click the **Access link**.

8. Select the appropriate Accessibility radio button then click the **Update Access** button.

Update access for TEST, MADDISON LEE ×

Accessibility ○ Full Access
● Limited: No Chart Access
○ Remove Access

Cancel **Update Access**

Access	Accessibility: Full	Accessibility: Limited
View chart data	X	
View Patient demographics	X	
View Messages sent to the patient	X	X
View upcoming appointments	X	X
Schedule an appointment	X	X
Send a message	X	X
Request a medication refill	X	
Request a referral	X	X
Print chart data	X	
Create and send clinical documents	X	
(Optional) Make a payment using Bill Pay	X	X

Remove a Proxy

The removal of a Proxy from a patient's portal account can be done by the Patient on the OP Patient Portal or by a practice user on the OP Practice Portal.

- From the OP Patient Portal: **Settings > My Account > Associated Accounts section > select Proxy > Remove Association**
- From the OP Practice Portal: **Patient Administration > Search for and select patient > Associations section > Remove Access**