



# **Proxy Patient Lists**

**Version 2**

**January 5, 2006**





Contact the ORCA Education team if you have any questions about this material by calling the Help Desk at 543-7012 or sending an E-mail to [mcsos@u.washington.edu](mailto:mcsos@u.washington.edu). Please specify which facility you are associated with.

ORCA Education Website: [www.orcaed.washington.edu](http://www.orcaed.washington.edu)

# Table of Contents

1. Proxy Patient List.....	5
Assign Proxy – Patient List .....	5
Designate a Proxy to view your Patient List(s) after list creation.....	5
Viewing a list if you have been designated as a Proxy .....	7
Remove Proxy List.....	8
Removing Proxy from a Provider .....	9

# 1. Proxy Patient List

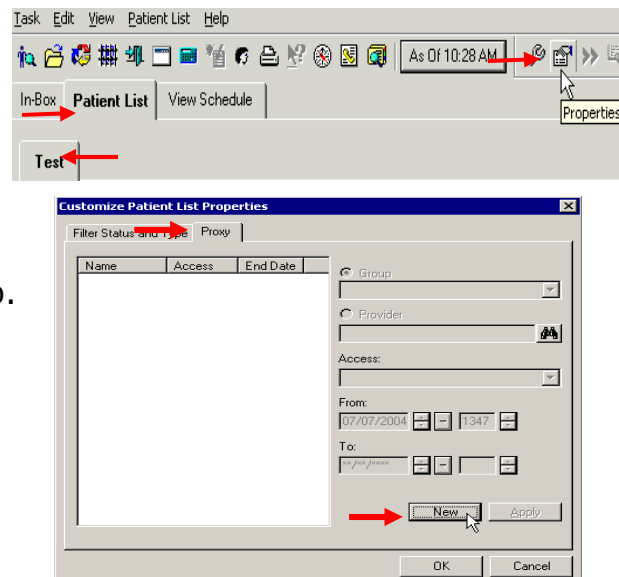
## Assign Proxy – Patient List

Proxy gives other provider(s) access to your Patient List(s).

- Usage Ideas for Proxy Lists
  - Shared patient population among team members
  - Vacation/ ill time coverage of patients by team members
  - Study patients – anyone on the team can add patients to the custom list.
  - Number of patients can be seen by the team over X time period with identified symptoms.
  - Any team member can add patients to the custom list for statistical purposes.

## Designate a Proxy to view your Patient List(s) after list creation

1. Open PowerChart.
2. Select **Patient List** Tab.
3. Select list to proxy to other user(s)
4. Click on **Properties** icon on toolbar.
5. Click **Proxy** tab – second tab.
6. Click **New**.



7. Click **Provider** radio button to provide access to an individual.

- To add provider, type Proxy's name in **Provider**  
Always type last name, first name.
- Proxy must be active PowerChart user (i.e.: they must have active PowerChart username/password).

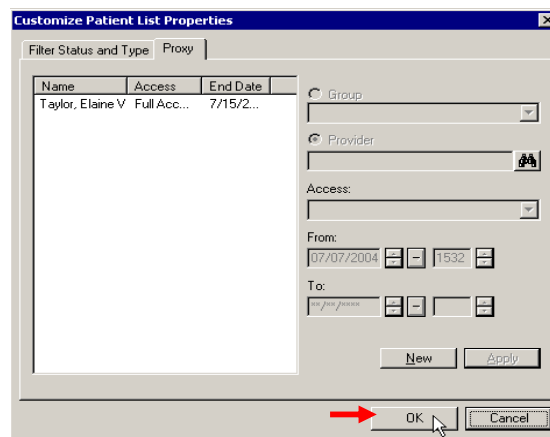
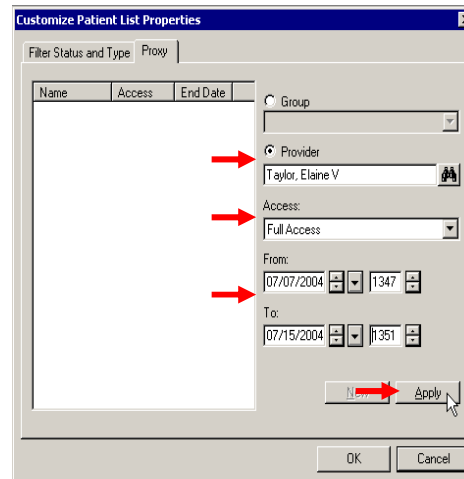
8. Use binocular icon to search for a Provider if needed

9. Choose level of **Access** – Full Access, Maintain, or Read.

10. Select **Date** and **Time** range that Proxy should have access to your list(s).

11. Click **Apply** button to move provider to list. Repeat as needed.

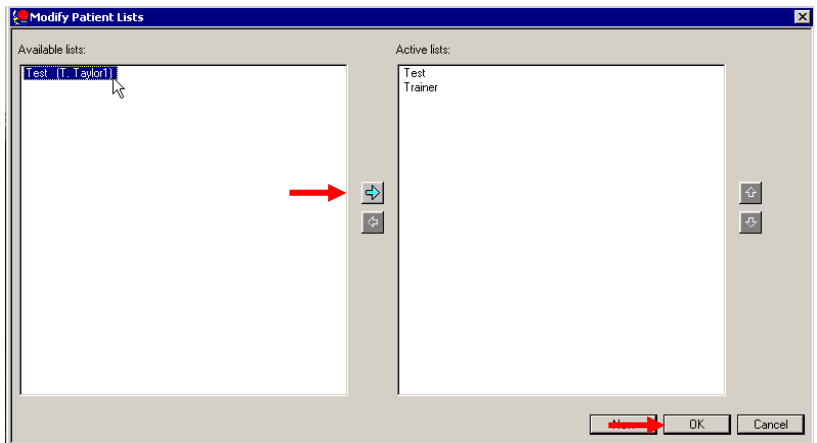
12. Click **OK**.



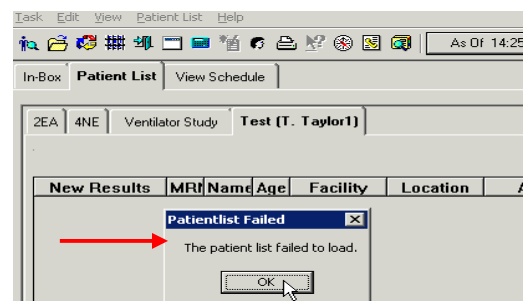
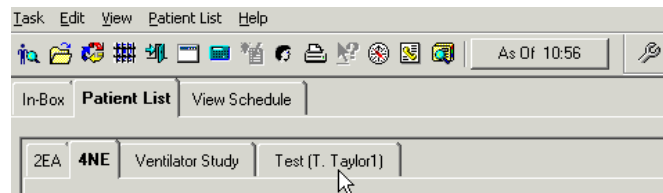
**Note:** Inform provider you have assigned your Proxy to them and that you have given them access to your Patient List(s). The provider will need to add this list to their Patient list(s).

## Viewing a list if you have been designated as a Proxy

1. Open PowerChart.
2. Select Patient List tab
3. Click on **List Maintenance** icon on toolbar.
4. Modify Patient Lists window opens.
5. Select patient list from left side – provider's name will be in brackets after list.



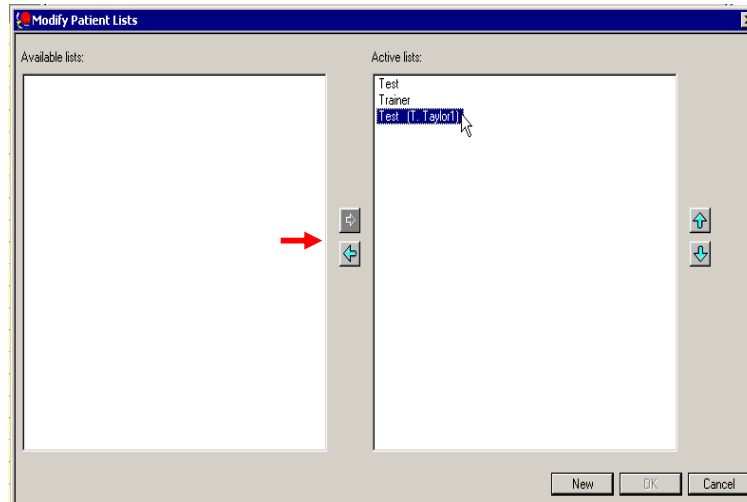
6. Click right-pointing arrow (Aqua colored) to move list from "Available" to "Active" list window.
7. Click **OK**.
8. Proxy lists will now be displayed as tabs along with other patient lists.
9. Click tab of the Proxy list – eg. **Test (T. Taylor1)**.
10. Double-click desired **Patient's Name** to open chart.



*NOTE: If Proxy has expired – the warning "Patient list failed to load" will display.*

## Remove Proxy List

1. To remove Proxy list, follow steps 1-4, click on Proxy list in "Active Lists" window. With Proxy list highlighted, click on left-pointing arrow (Aqua colored) to remove it from Active List.

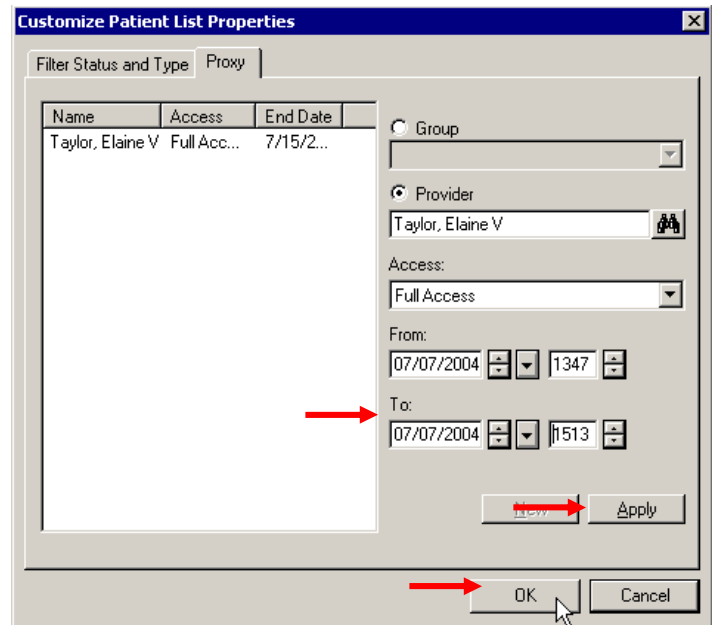
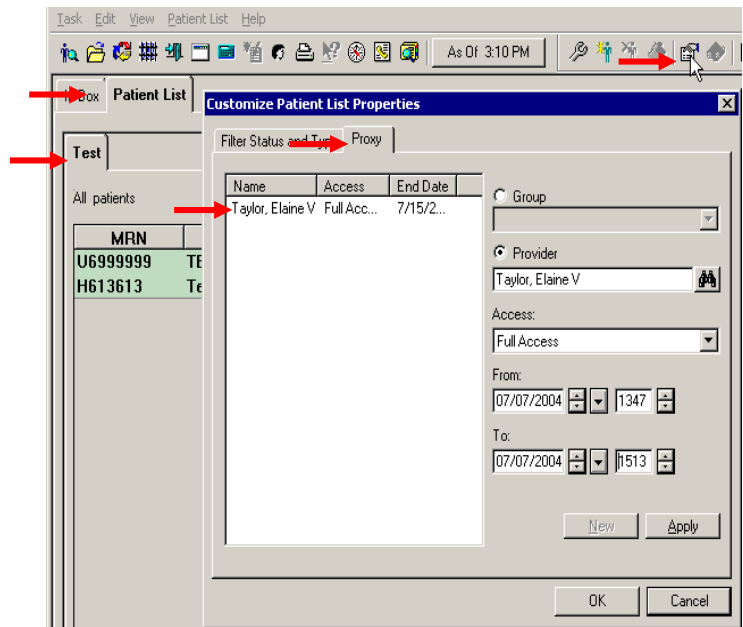


2. Click OK.

**NOTE:** Tab for proxy list will be removed from patient list tabs.

## Removing Proxy from a Provider

1. Open PowerChart.
2. Select Patient List Tab.
3. Select list from which to remove proxy.
4. Click **Properties** icon on toolbar.
5. Click **Proxy** tab.
6. Select appropriate entry from list of proxies.
7. Remove proxy using the arrows beside the "To" date and time to change them to the present or type "T" for today's date and "N" for "Now" in time.
8. Click **Apply**
9. Proxy's name will continue to appear on list but End Date will change. Name will be removed when user logs out.
10. Click **OK**.



**Note:** When assigned proxy attempts to access patient following expiration - provider will be unable to open list. The following error message will display: **"Patient list Failed - The patient list failed to load"**.