Proxying a Patient List:

Must be done from the "Patient List" Screen
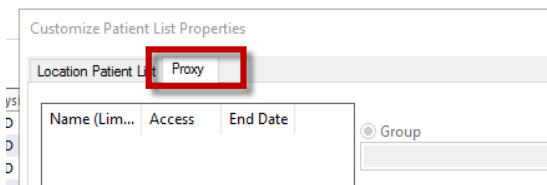

Click on the "Properties" Icon

Select the "Proxy" tab

Select "New"

There is an option to select "Group" or "Individual Provider"

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If "Group" is selected, click on the drop down arrow to display the list of options
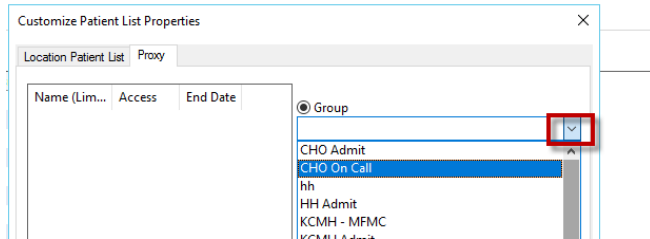
Select applicable option

"Group" or "Provider"
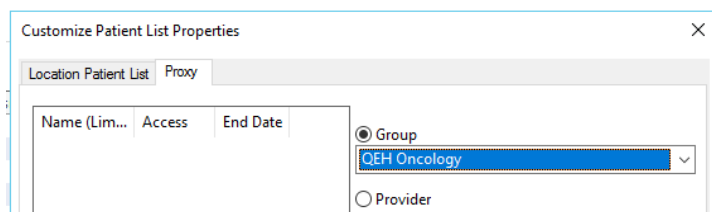
To Proxy to a Specific Clinician: Select "Provider"

To Search, begin typing the first few letters of their last name
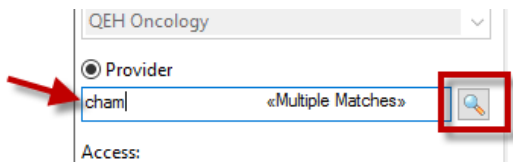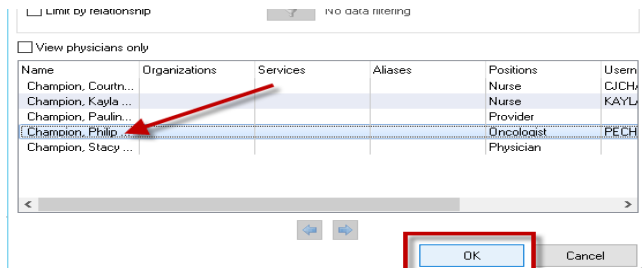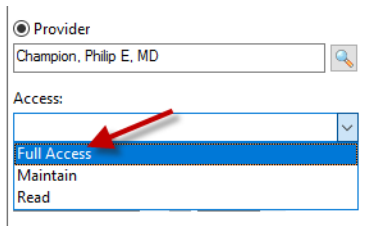
If multiple matches click on the Magnifying glass icon

Select appropriate name from the list displayed and click "OK"

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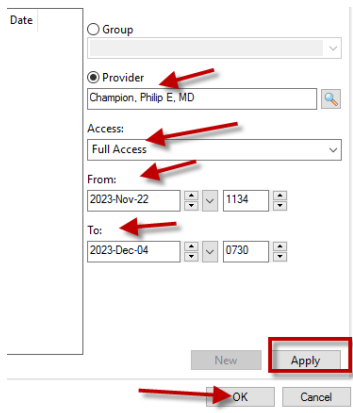
Choose level of access for your proxy

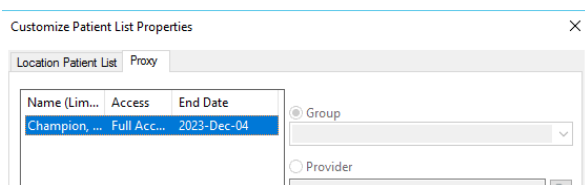Then choose the proxy time period

The "From" will display the current date and time but can be changed

Select the "To" date and time

Click "Apply" then click "OK"


Proxy screen will display information

To view a proxied list :

**From the Patient List Screen:**

1. Select the "wrench" icon

2. "Modified Patient List" opens , the list proxied will display under "Available Lists"and will have the name of the proxing clinician in brackets

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3. Click on the name of the proxied list, click on "Add", list name will move to the "Active list"

4. Click "OK"
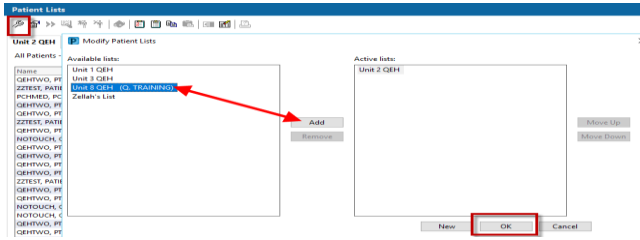
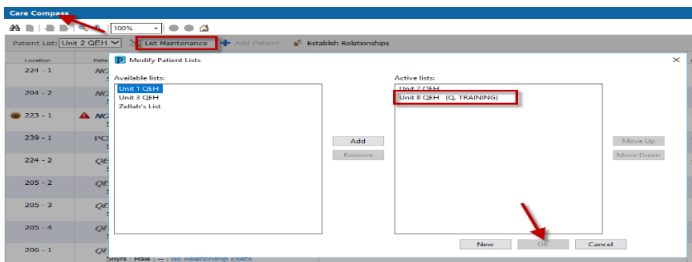 Proxied list will appear on the"Patient List" screen
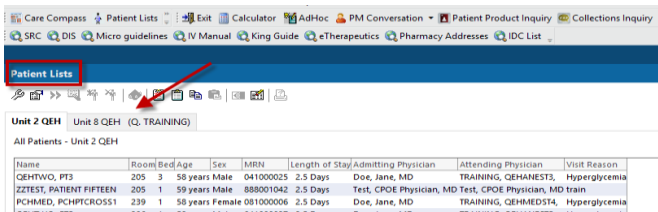
From Care Compass:

1. Click on "List Maintenance"

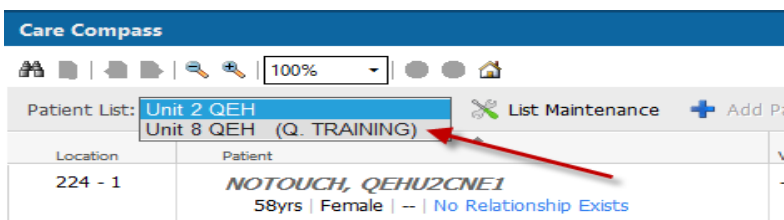2. "Modified Patient List" opens , proxied list will display under "Available Lists"

3. List will have the name of the proxing clinician in brackets

4. Click on the name of the proxied list, click on "Add", list name will move to the "Active list"
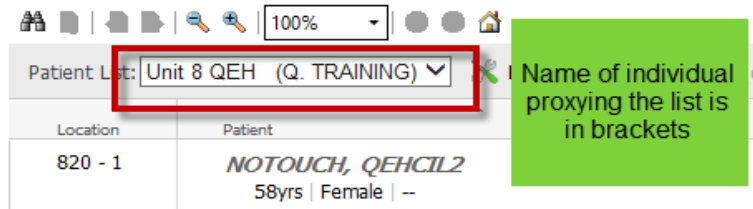
5. Click "OK"

Proxied list is an available option on "Patient List"

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To open proxied list click on list name

Proxied list appears on "Care Compass"