



HOW TO PROXY YOUR PATIENT LIST TO ANOTHER PROVIDER

1. Click the tab for the list you want to proxy.
2. Click the *Properties*  icon.
3. Click the *Proxy* tab in the **Customize Patient List Properties** window.
4. Click the *New* button.
5. Click the button to the left of *Provider*.
6. Enter the last name of the provider that will receive the list then click the binocular icon.
7. The **Provider Selection List** will open. Select the appropriate provider from the list and then click on *OK*.
8. The **Customize Patient List Properties** window will reopen. Click the drop down arrow next to the *Access* field and select an access level.
9. If applicable, enter a From and To Date and Time.
10. Click the *Apply* button to save the proxy designation. The name will display in the left window.

NOTE: The person to whom you designated the proxy will need to activate your list. This is done by him or her opening the **Modify Patient Lists** box and moving the proxy list from *Available Lists* to

Active Lists by highlighting the list name, clicking on the , and then on the *OK* button. The proxy list will appear with the owner's name in brackets.

