



COMPASS UPDATE

Allowing Proxies to Access an Existing Patient List

COMPASS users can allow other individuals (co-workers, medical office personnel) to access their patient list using the **Proxy** function. To proxy into an existing list, follow the instructions below.

1. Activate the proper list by clicking its tab on your Organizer.
2. Click on **Patient List** from the horizontal task bar at the top of your screen.
3. Select **Properties** from the drop-down box.
4. The Customized Patient List Properties box will appear. Click on the **Proxy** tab.
5. Click on the **New** button.
6. Select the **Provider** option. Type the name of the person you want proxied. Enter names in **last name, first name** format. *Note: Only individuals with existing COMPASS accounts can be proxied into a list.*
7. Choose the level of access this person will have to your patient list. Options are Full, Maintain or Read.
8. You may also set a time limit on proxied access, but this is not required.
9. Click **OK**. Repeat for additional individuals as necessary.

