


COMPASS UPDATE

Allowing Proxies Access in a New Patient List

COMPASS users can allow other individuals (co-workers, medical office personnel) to access their patient list using the **Proxy** function. When creating a new patient list, follow the instructions below to add proxies.

1. Click the **List Maintenance** button on the horizontal toolbar at the top of your screen. 
2. The Modify Patient List Box will appear. Click **New**.
3. Select the type of list you want create (Provider Group, Location, or Custom). Click **Next**.
4. Depending on the list you are creating, screens will appear allowing you to choose your desired settings. Work through these screens until you reach the **Proxy** screen.
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.

