

Quick Start Guide

Proxy Access Set-Up during Pandemic

myChart Proxy Setup During the Coronavirus.....	2
Adult to Child < 18	3
Proxy Setup for child:.....	4
Adult to Adult.....	6
Proxy Setup for Adult:.....	7
Table A – Proxy Access Level and Function	12

myChart Proxy Setup During the Coronavirus

With Proxy Access, a parent can obtain access to their child's myChart account OR a patient may allow another adult access to their myChart account. The term 'proxy' in this context means someone who has access to a myChart account that is not their own and has nothing to do with Healthcare Proxy.

During the Coronavirus Pandemic, when interactions with patients and caregivers is done primarily via telephone and/or video visits, we need to adjust our processes to align with these restrictions. Thus, under certain conditions we will not be requiring that the current authorization forms be signed as many at home patients and caregivers may not have access to a printer/scanner.

This document will outline the conditions and steps to setup myChart proxy access when the normal process with the physically signed authorization forms cannot be accommodated.

Adult to Child < 18

The below will outline the steps to set-up myChart for a child under 18.

Requirements: that the parents must provide:

- a) their name
- b) their address
- c) their DOB
- d) child's name
- e) child's address
- f) child's DOB
- g) child's primary care provider

❖ For address, if what the parent provides doesn't match – ask the parent if there are any prior addresses that might have been used.

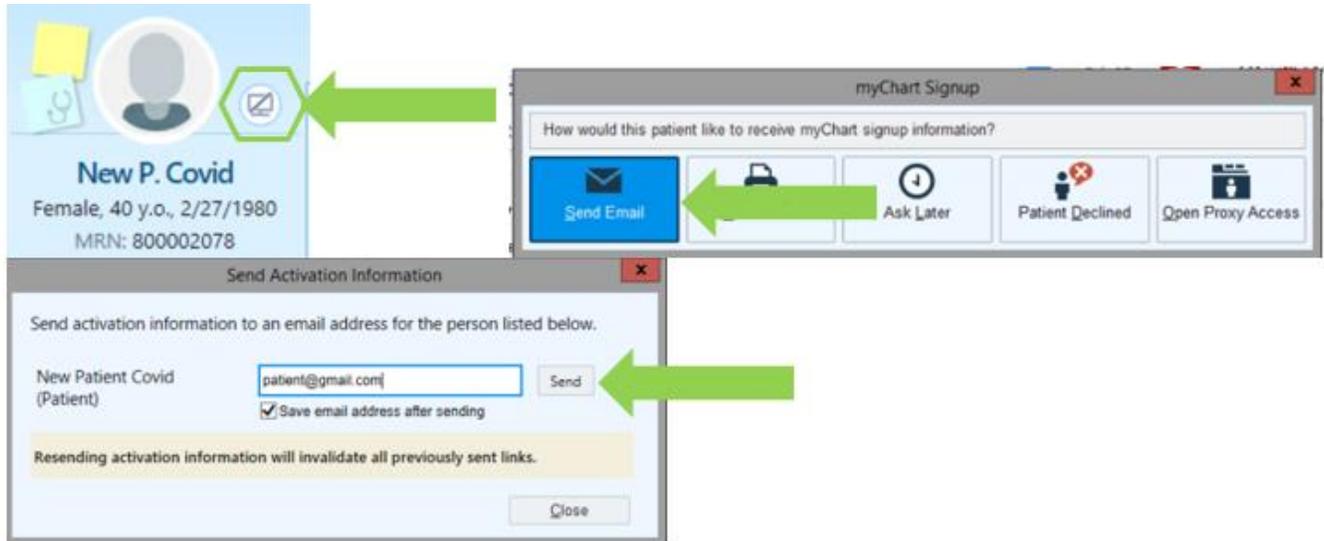
2. The parents **MUST** be listed in the contacts as legal guardian



3. The proxy parent must have their own myChart account to be granted proxy access.

If the Proxy parent is a UMMHC patient but does not yet have myChart, send the activation email:

- a) Select the parent proxy and select the myChart icon from the Storyboard.
- b) Select **Send Email**.
- c) Enter the parent proxy provided email and read it back for verification, then select **Send**.

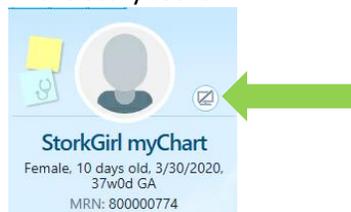


If the parent proxy is not a UMMHC patient, ask them to call 855-UMASS-MD. On this call they need to explain that they would like to create a myChart account and thus need to be registered and have an activation email sent to them. Once they complete this step with 855, they can call back to the child's provider's office for the final proxy setup step.

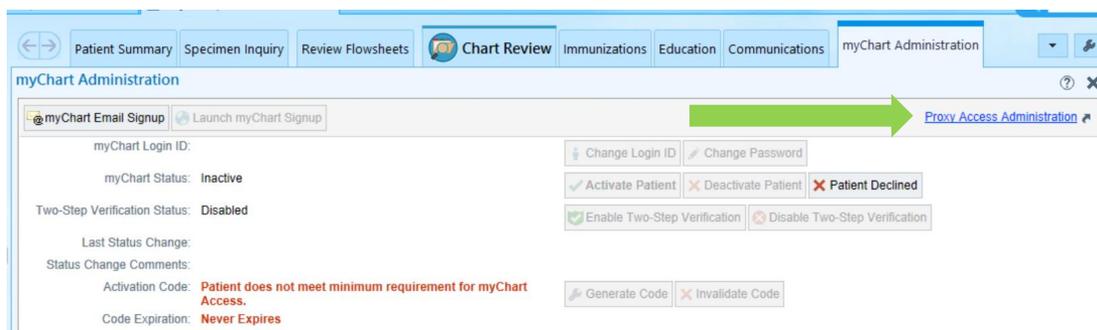
Proxy Setup for child:

Parent Proxy access can be performed easily while in the child's chart.

- a) Complete the Requirements in step 1
- b) Confirm that the parent proxy already has their own myChart account (Requirements step 3 if not).
- c) From the child's account click the myChart icon in the storyboard.



4. Select Proxy Access



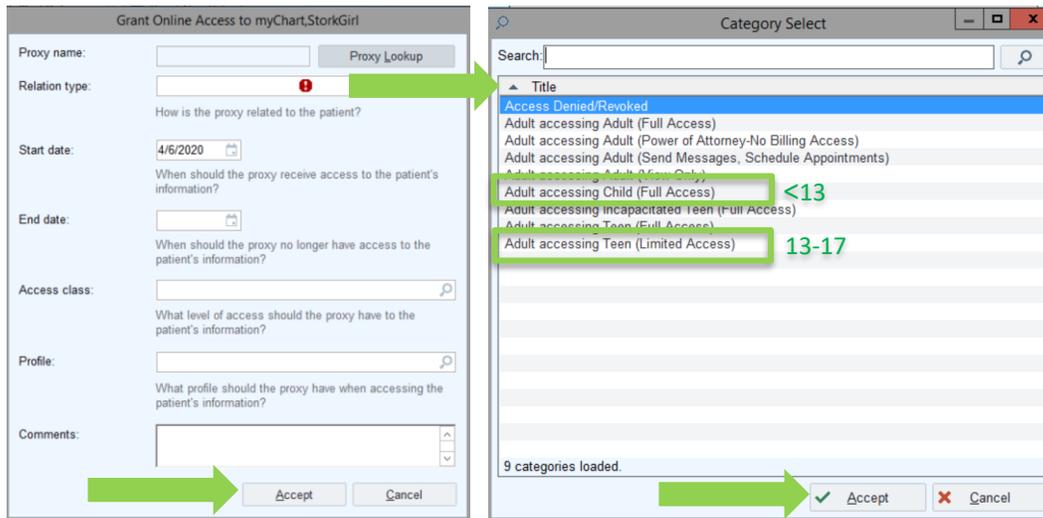
5. Look to the Suggested Contacts for the parent proxy.

- a) If the parent proxy is listed, select the  Mychart, Ben
- b) If the parent proxy is not listed as a Suggested Contact, inform the parent that you cannot provide proxy access at this time as the relationship was not previously established.

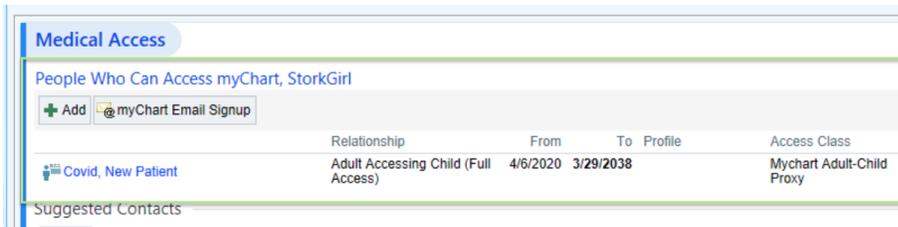


6. After selecting the ADD from 5a, you will be presented with the Grant Online Access Screen:

- a) Select the appropriate Relation type:
 - i. If the child is under age 13, Adult accessing Child (Full)
 - ii. If the child is 13 to through 17, select Adult accessing Teen (Limited Access)
 - iii. Select Accept – from the category select screen
- b) Select Accept – from the Grant Online Access screen



7. Verify that the patient proxy now has myChart proxy access to the child



Adult to Adult

Requirements:

With Adult patients, we must obtain consent from the patient in order to provide myChart proxy access to another adult (desired proxy). During this pandemic, the process of obtaining Authorizations is still required but can be accommodated verbally with the patient (method 1).

There are also 2 alternate methods that the patient can use to provide consent to myChart proxy access during this time.

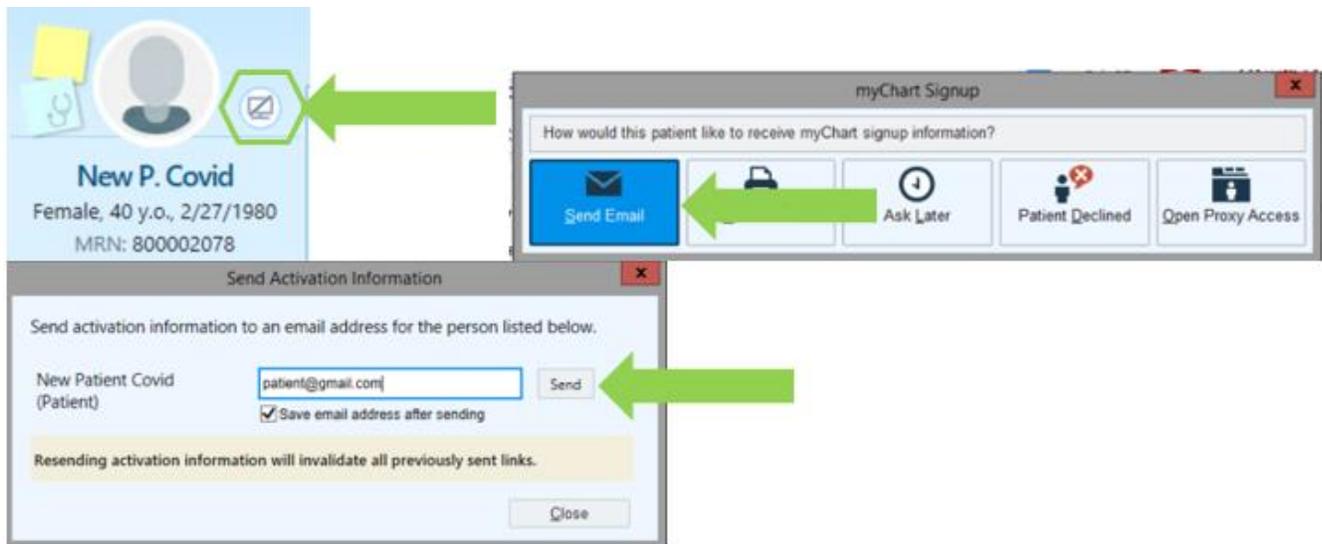
The desired myChart Proxy MUST have a myChart account, but the patient doesn't have to have a myChart account.

For methods 1 and 2, if the desired proxy is not a UMMHC patient, ask them to call 855-UMASS-MD. On this call they need to explain that they would like to create a myChart account and thus need to be registered and have an activation email sent to them. Once they complete this step with 855, they should notify the patient who can call back for the final proxy setup step.

If the patient does have a myChart account, suggest using method 3 instead.

If the desired proxy does not have a myChart account, follow steps below **after obtaining patient consent as described in methods 1 and 2 below**:

- I. Select the desired proxy and select the myChart **icon** from the Storyboard.
- II. Select **Send Email**.
- III. Enter the email for the desired proxy (the patient must provide this, don't assume the desired proxy's email on file is correct) and read it back to the patient for verification, then select **Send**.

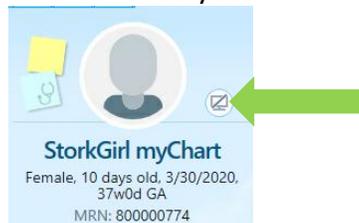


Proxy Setup for Adult:

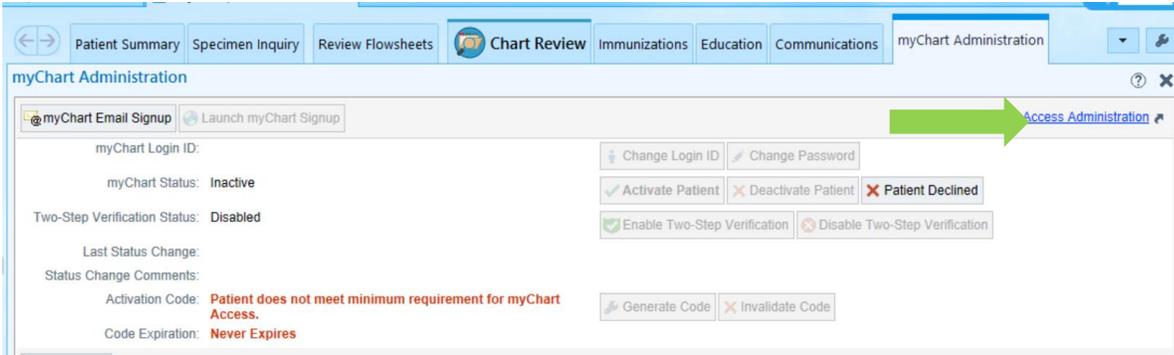
See Table A below to identify what level of functionality is provided for the different Proxy Access Levels.

Method 1

1. You must provide the patient with the **Authorization to Access an Adult myChart Record** (Adult to Adult) form, found at the bottom on the myChart webpage. <https://www.umassmemorialhealthcare.org/patients-visitors/mychart-patient-website>. If the patient has access to a device with email and a browser, this link may be emailed to the patient. If the patient does not have electronic access, you may print and mail the form to the patient or if the patient is admitted to the hospital, a member of their care team may print and deliver the paper copy to the patient. Only proceed to step 2 when the patient has confirmed that they have received, read, and understood the authorization form. You may read through the authorization form with the patient as needed.
 2. When speaking with a patient you must obtain verifying information from the patient about the patient and about the desired proxy. The patient must provide:
 - a) their name
 - b) their address
 - c) their DOB
 - d) whether the desired proxy already has their own myChart account
 - e) the proxy's name
 - f) the proxy's address
 - g) the proxy's DOB
 - h) the proxy's email address
 - i) the ACCESS LEVEL the patient would like the desired proxy to have:
 - a. Full Access
 - b. Clinical Information, but no billing info (Power of Attorney)
 - c. Send Messages, Schedule Appointments only
 - d. View only
 - j) VERBAL consent that they understand that they are authorizing the sharing their myChart record with the desired proxy. If they choose to withdraw this access later, they must make their request as follows:
 - a. If they have their own myChart, they can REVOKE ACCESS from the proxy by navigating to the PROFILE tab and selecting PERSONALIZE
 - b. If they do not have their own myChart, they must email myChartsupport@umassmemorial.org or call 855-UMASS-MD.
- ❖ For address, if what the patient provides for either the patient's address or the desired proxy's address doesn't match the address on file – ask the patient if there are any prior addresses that might have been used.
3. From the patient's account click the myChart icon in the storyboard.



4. Select Proxy Access Administration.



5. Look to the **Suggested Contacts** for the desired proxy.

- a. If the desired proxy is listed, select the  **Mychart, Ben** and proceed to Step 6

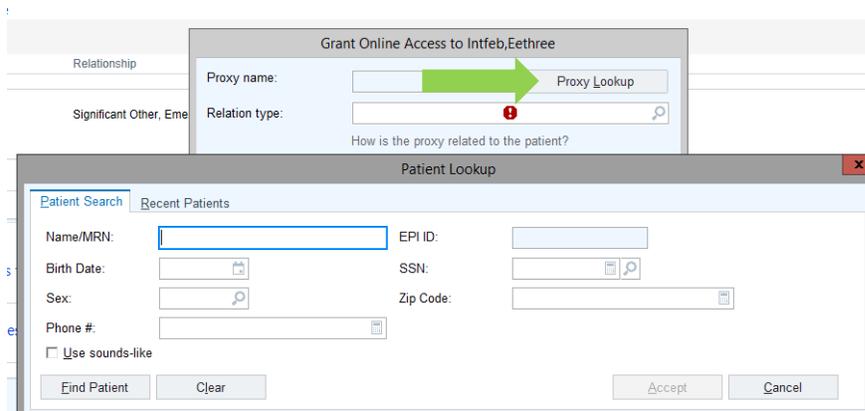


- b. If the desired proxy is not listed as a Suggested Contact, select the  in the **People Who Can Access** section and Proceed to Step 6

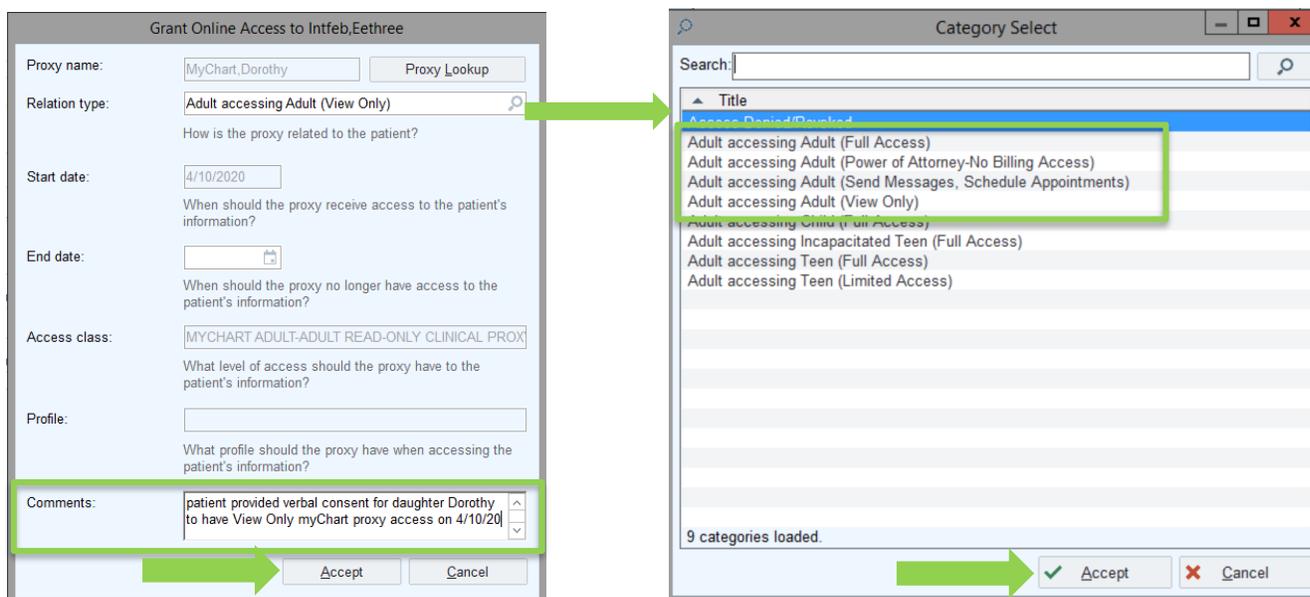


6. After selecting the ADD, you will be presented with the Grant Online Access screen:

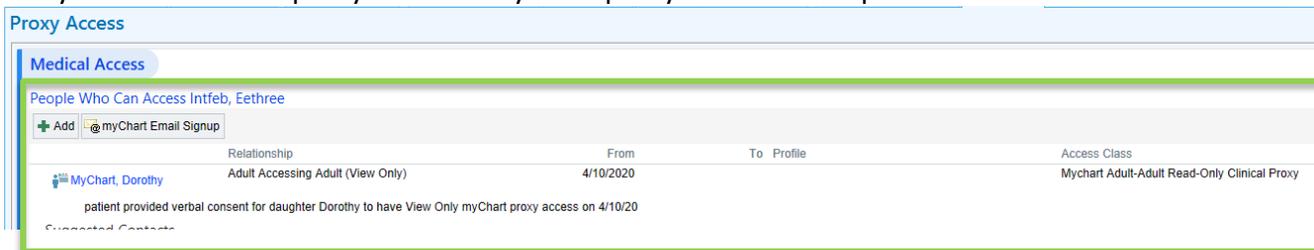
- If the desired proxy was **not** in the suggested contact (4b from above), you must **first** FIND the proxy's patient record by selecting **Proxy Lookup**. If desired proxy was found in the Suggested Contacts, skip to 6d.
- Complete the search fields and select **Find Patient**.
- Select the patient



- d) Select the appropriate Relation type (Access Level) confirmed in step 2i.
- e) Select Accept – from the category select screen
- f) In the comments field, enter detail of the verbal authorization received.
 - i. Confirm patient understood
 - ii. Verbal consent obtained
 - iii. Who/relationship of proxy
 - iv. Access level
- g) Select Accept – from the Grant Online Access screen



7. Verify that the desired proxy now has myChart proxy access to the patient.



Method 2:

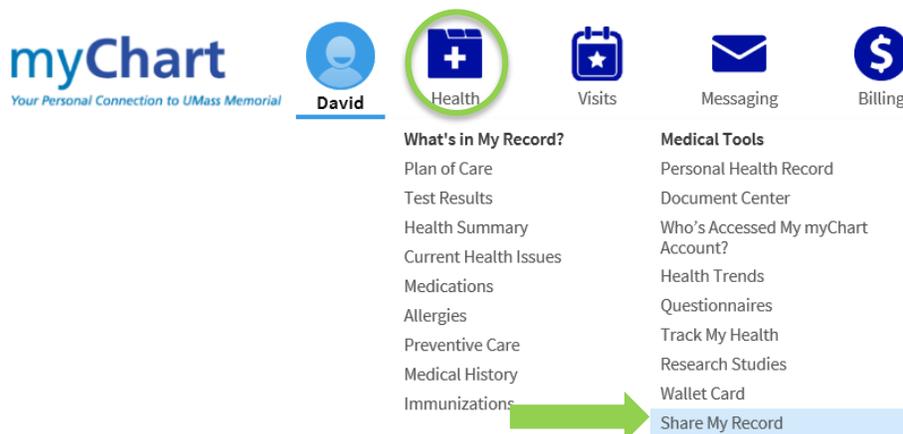
If the patient has access to a printer/scanner the normal process can be followed electronically. Instruct the patient as follows:

1. Print the **Authorization to Access an Adult myChart Record (Adult to Adult)** form, found at the bottom on the myChart webpage. <https://www.umassmemorialhealthcare.org/patients-visitors/mychart-patient-website>
 2. Complete and Sign the form
 3. Scan the form
 4. Email the form to mychartsupport@umassmemorial.org OR FAX to the patient's Providers office.
 5. The 855 Staff will then forward to the patient's primary care provider's office via FAX.
 6. The provider's office would follow the same process in Epic for the setup (see the existing proxy access job aids on the learning home dashboard).
- ❖ This can ONLY be accomplished if the primary care provider is a UMMHC provider.

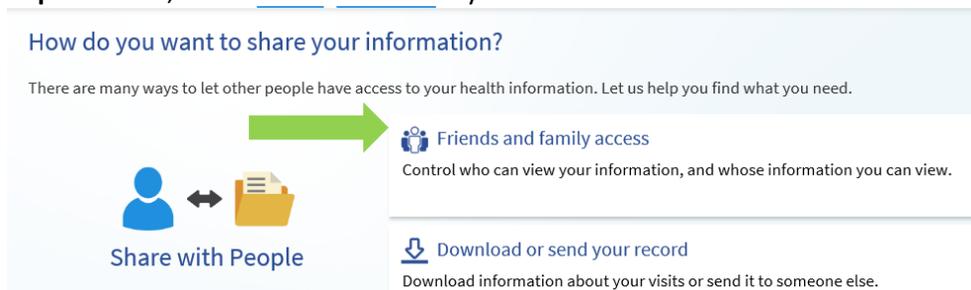
Method 3:

If the patient has a UMMHC myChart account, they can grant access to the desired proxy themselves through their account. This does require the desired proxy to be in Epic or have their own UMMHC myChart account.

1. From the patient's myChart account, navigate to the **Health** tab and select **Share my Record**.



2. In the **Share with People** section, select **Friends and Family Access**



3. Click the (+) plus sign to invite someone (the desired proxy)



4. The patient must then:
 - a. Enter the desired proxy's first name
 - b. Enter the desired proxy's email – twice to verify
 - c. Select the Level of access they would like the desired proxy to have.

Invite Someone to Have Access to Your Record

- 1 We will email an invitation to someone you trust.
- 2 From the email, they can log in to their myChart to accept the invitation.
- 3 They must verify they know you by entering your date of birth.

Who are you inviting?

* Name

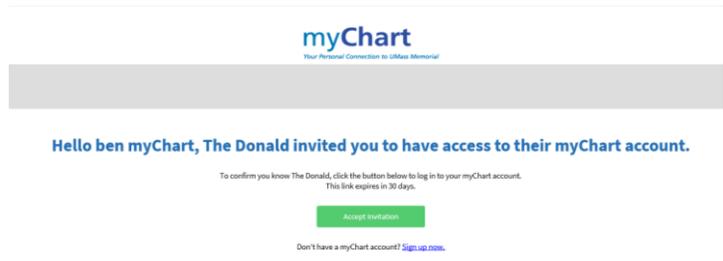
Where should we send this invitation?

* Email Confirm email

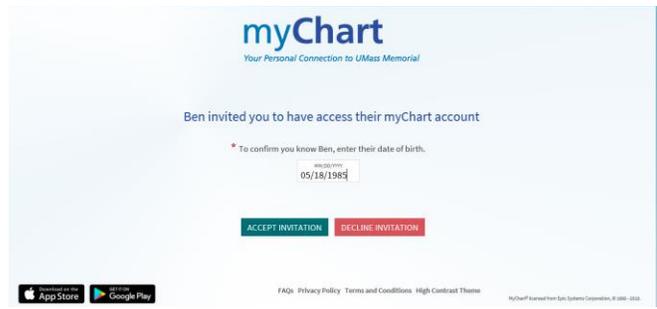
*What kind of access would you like this person to have to your chart?

<p>Adult Accessing Adult - Full Access</p> <p>This type of access is for an adult accessing another adults record in myChart. This person will have access to clinical information, along with messaging and scheduling features.</p>	<p>Adult Accessing Adult - View Only</p> <p>This type of access is for an adult accessing another adult's record in myChart. This person will have view only access to clinical information, along with messaging and appointment information.</p>	<p>Adult Accessing Adult - Scheduling/Messaging Access</p> <p>This type of access is for an adult accessing another adult's record in myChart. This person will have the ability send messages and schedule appointments. No clinical information will be available.</p>
--	---	---

The intended adult proxy receives an invitation email from the patient



To which they must enter the patient's DOB to accept.



Any questions, email myChartadmin@umassmemorial.org .

Table A – Proxy Access Level and Function

Relationship	Adult Accessing Adult (Full Access)	Adult Accessing Adult (View Only)	Adult Accessing Adult (Power of Attorney)	Adult Accessing Adult (Send Msgs, Sched Appts)	Adult Accessing Child (Full Access)	Adult Accessing Teen* (Limited Access)
Min Age	18	18	18	18	0	13y 0days
Max Age	999	999	999	999	12y 364 days	17y 364days
Ends At?	n/a	n/a	n/a	n/a	18	18
Alerts	x	x	x	x	x	
Scheduling [View]	x	x	x	x	x	
Scheduling [Interact]	x		x	x	x	x
Scheduling [Preferences]	x				x	
Messaging	x		x	x	x	x
View Meds	x	x	x		x	
Update Meds	x		x		x	
Med Refill	x	x	x		x	
View Allergies	x	x	x		x	x
Update Allergies	x		x		x	
Family History	x	x	x		x	x
Other Histories	x	x	x		x	
Billing [View]	x				x	x
Billing [Interact]	x				x	x
View Demographics	x		x		x	x
Update Demographics	x		x	x	x	x
Results	x	x	x		x	
Health Maintenance	x	x	x		x	x
View Problem List	x	x	x		x	
Update Problem List			x			
WalletCard	x	x			x	
Growth Chart					x	x
My Conditions	x	x			x	
Questionnaires	x				x	x
Flowsheets	x				x	x
Patient Goals	x	x			x	x
Hospital Visit Details	x	x	x		x	
Download Visit Summary	x	x	x		x	
Care Everywhere Auth					x	x
Proxy Access					x	
Terms and Conditions	x	x	x	x	x	x
Immunizations	x	x	x		x	x
Letters						