MyChart

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

Ρ	roxy Access			
	Medical A	ccess		
	People Who	o Can Access myChart, Stork(Sirl	
	🕇 Add 🍡	myChart Email Signup		
			Relationship	From
	Suggested	Contacts		
	+ Add	July, Storkthree	Mother, Emergency Contact	
	+ Add	Mychart, Ben (Legal Guardian)	Father, Emergency Contact	



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.

0	(a)			myChart Signup		
		How would this p	patient like to receive myC	hart signup information	17	
New P. Covi emale, 40 y.o., 2/2 MRN: 8000020	d 7/1980 78	Send Email		Ask Later	Patient Declined	Open Proxy Acces
	Send Activation Information	×				
end activation informat	on to an email address for the pers	on listed below.				
New Patient Covid	patient@gmail.comj	Send				
Patient)	Save email address after sending	9				
	mation will invalidate all previously se	ent links.				
tesending activation infor						

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

Patient Summary Specimen Inquir	y Review Flowsheets	Chart Review	Immunizations	Education	Communication	ns myChart Admini	istration	•	ş
myChart Administration								?	×
myChart Email Signup Aunch myChar	t Signup					P	roxy Access	s Administration	~
myChart Login ID:			🕴 Change Logi	n ID 📝 Cha	nge Password				
myChart Status: Inactive			Activate Pat	ient 🗙 Dea	ctivate Patient	× Patient Declined			
Two-Step Verification Status: Disabled			Enable Two-	Step Verificat	ion 🚫 Disable	Two-Step Verification			
Last Status Change:									
Status Change Comments:									
Activation Code: Patient does Access.	not meet minimum requir	ement for myChart	<i> G</i> enerate Co	de 🗙 Invali	date Code				
Code Expiration: Never Expires	•								

- 5. Look to the Suggested Contacts for the parent proxy.
 - a) If the parent proxy is listed, select the + Add + 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.

Medical Access		
eople Who Can Access myChart,	StorkGirl	
🕂 Add 🛛 🗟 myChart Email Signup		
	Relationship	From
Suggested Contacts		
🕂 Add 🚔 July, Storkthree	Mother, Emergency Contac	t

- 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

Gr	rant Online Access to myChart,StorkGirl	Category Select	_ 0	x
Proxy name:	Proxy Lookup	Search:		,o
Relation type:	9	▲ Title		
Start date:	How is the proxy related to the patient?	Access Denied/Revoked Adult accessing Adult (Full Access) Adult accessing Adult (Power of Attorney-No Billing Access) Adult accessing Adult (Send Messages, Schedule Appointments)		
End date:	information?	Adult accessing Child (Full Access) <13		
Access class:	Ø What level of access should the proxy have to the patient's information?			
Profile:	What profile should the proxy have when accessing the patient's information?			
Comments:	Accept Cancel	9 categories loaded.	× <u>C</u> ance	1

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

Medical Access					
People Who Can Access myChart, St	torkGirl				
🕂 Add 🛛 🖓 myChart Email Signup					
	Relationship	From	То	Profile	Access Class
ter	Adult Accessing Child (Full Access)	4/6/2020	3/29/2038		Mychart Adult-Child Proxy
Suggested Contacts					

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

- 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.

+ Add July, Storkthree	Mother, Emergency Conta	act
Suggested Contacts	routoromp	
+ Add MyChart Email Signup	Relationshin	From
People Who Can Access myChart,	StorkGirl	
Medical Access		
oxy Access		

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

Proxy Access		
Medical Access		
People Who Can Access m	yChart, StorkGirl	
🕈 Add 🤤 myChart Email Sign	nup	
	Relationship	From
Suggested Contacts		
+ Add July, Storkthree	e Mother, Emergency Contac	t
+ Add + Mychart, Ben (L	egal Guardian) Father, Emergency Contact	t

- 6. After selecting the ADD, you will be presented with the Grant Online Access screen:
 - a) 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.
 - b) Complete the search fields and select Find Patient.
 - c) Select the patient

1					
	[Grant Onli	ne Access to Intfeb,Eethre	ee	
	Relationship	Proxy name:		Proxy <u>L</u> ookup	
	Significant Other, Eme	Relation type:	9	2	
		How is	the proxy related to the pat	ient?	
			Patient Lookup		x
Patie	nt Search <u>R</u> ecent Pa	atients			
Nam	ne/MRN:		EPI ID:		
s Birth	n Date:	-	SSN:		
Sex	-	9	Zip Code:		
e: Pho	ne #:				
	Jse sounds-like				
E	ind Patient	Clear		Accept	Cancel

- 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

	Grant Online Access to Intfeb,Eethree	Category Select	
Proxy name:	MyChart,Dorothy Proxy Lookup	Search:	Ģ
Relation type:	Adult accessing Adult (View Only)	▲ Title	
Start date:	How is the proxy related to the patient?	Adult accessing Adult (Full Access) Adult accessing Adult (Power of Attorney-No Billing Access) Adult accessing Adult (Send Messages, Schedule Appointments)	
End date:	When should the proxy receive access to the patient's information?	Adult accessing Adult (View Only) Adult accessing Child (Tuit Access) Adult accessing Incapacitated Teen (Full Access) Adult accessing Teen (Full Access)	
	When should the proxy no longer have access to the patient's information?	Adult accessing Teen (Limited Access)	
Access class:	MYCHART ADULT-ADULT READ-ONLY CLINICAL PROX		
	What level of access should the proxy have to the patient's information?		
Profile:			
	What profile should the proxy have when accessing the patient's information?		
Comments:	patient provided verbal consent for daughter Dorothy to have View Only myChart proxy access on 4/10/20	9 categories loaded.	
	<u>A</u> ccept <u>C</u> ancel	Accept X C	ancel

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

Proxy Access						
Medical Access						
People Who Can Access Intfeb, Eethree						
🛨 Add 🛛 🖓 myChart Email Si	gnup					
	Relationship	From	To Profile	Access Class		
🚝 MyChart, Dorothy	Adult Accessing Adult (View Only)	4/10/2020		Mychart Adult-Adult Read-Only Clinical Proxy		
patient provided verbal consent for daughter Dorothy to have View Only myChart proxy access on 4/10/20						

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 <u>mychartsupport@umassmemorial.org</u> 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.

myChart Your Personal Connection to UMass Memorial	David	Health	Visits	Messaging	S Billing	
		What's in My Record?		Medical Tools		
		Plan of Care		Personal Health Reco	rd	
		Test Results		Document Center		
	Health Summary Current Health Issues Medications			Who's Accessed My myChart Account? Health Trends		
			Current Health Issues Medications			
		Allergies		Questionnaires		
		Preventive Care	Track My Health			
	M	Medical History		Research Studies		
		Immunizations		Wallet Card		
				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)

Friends and Family Access

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						
		2				
 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?					
Adult Accessing Adult - Full Access	Adult Accessing Adult - View Only	Adult Accessing Adult - Scheduling/Messaging Access				
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.	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.	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.				

The intended adult proxy receives an invitation email from the patient

myChart No Preve Concerns to Other Menual					
Hello ben myChart, The Donald invited you to have access to their myChart account.					
To confirm you know The Danald, click the button below to log in to your myChart account. This link expires in 30 days.					
Accept Invitation					

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



Any questions, email myChartadmin@umassmemorial.org.

Table A – Proxy Access Level and Function

	Adult	Adult	Adult	Adult	Adult	Adult
	Accessing	Accessing	Accessing	Accessing	Accessing	Accessing
	Adult (Full	Adult (View	Adult (Power	Adult	Child	Teen*
	Access)	Only)	of Attorney)	(Send Ivisgs,	(Full Access)	(Limitted
Relationship				Sched Appts)		Accessy
Min Age	18	18	18	18	0	13y Odays
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	х
Scheduling [Preferences]	x				x	
Messaging	x		x	x	x	x
View Meds	x	x	х		x	
Update Meds	x		x		x	
Med Refill	х	x	х		x	
View Allergies	x	x	х		x	х
Update Allergies	x		х		x	
Family History	x	x	х		x	х
Other Histories	x	x	х		x	
Billing [View]	x				x	х
Billing [Interact]	х				x	х
View Demographics	х		х		x	х
Update Demographics	х		х	х	х	х
Results	х	x	x		x	
Health Maintenance	x	x	х		x	х
View Problem List	х	x	х		x	
Update Problem List			x			
WalletCard	x	x			x	
Growth Chart					x	x
My Conditions	x	x			x	
Questionnaires	x				x	х
Flowsheets	х				x	х
Patient Goals	x	x			x	х
Hospital Visit Details	x	x	x		x	
Download Visit Summary	х	x	х		х	
Care Everywhere Auth					x	х
Proxy Access					x	
Terms and Conditions	х	x	x	x	x	х
Immunizations	x	x	х		x	Х
Letters						