

Adding a Proxy User

Date created: April 8, 2022

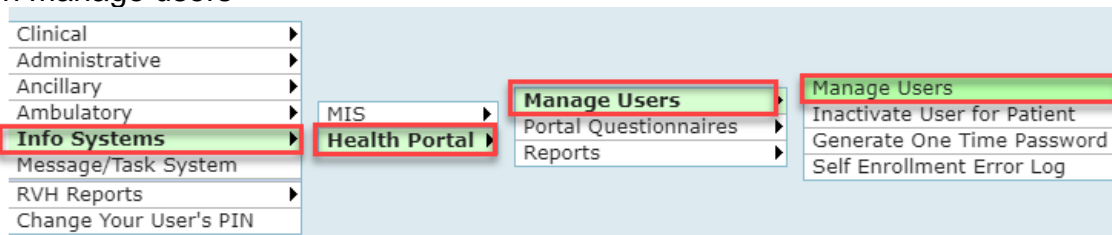
Audience: HIM & Portal Coordinators

Overview

This function is used for adding a proxy user to a portal account and viewing what access each user has on the portal users account.

To add proxy user:

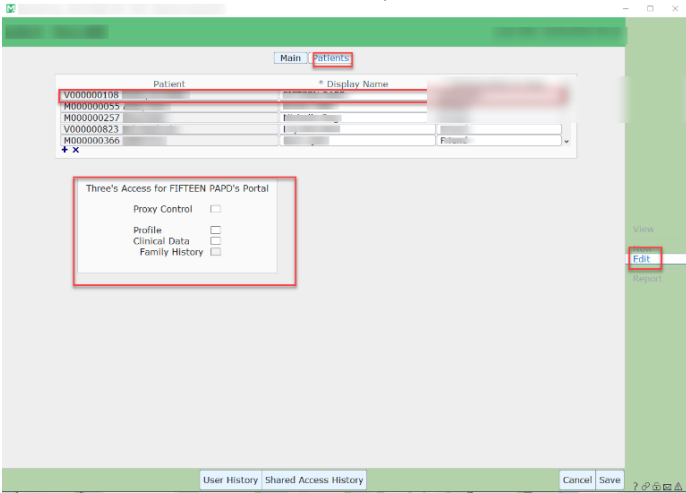
1. Open manage users



2. Search the user (who is giving access to their account)

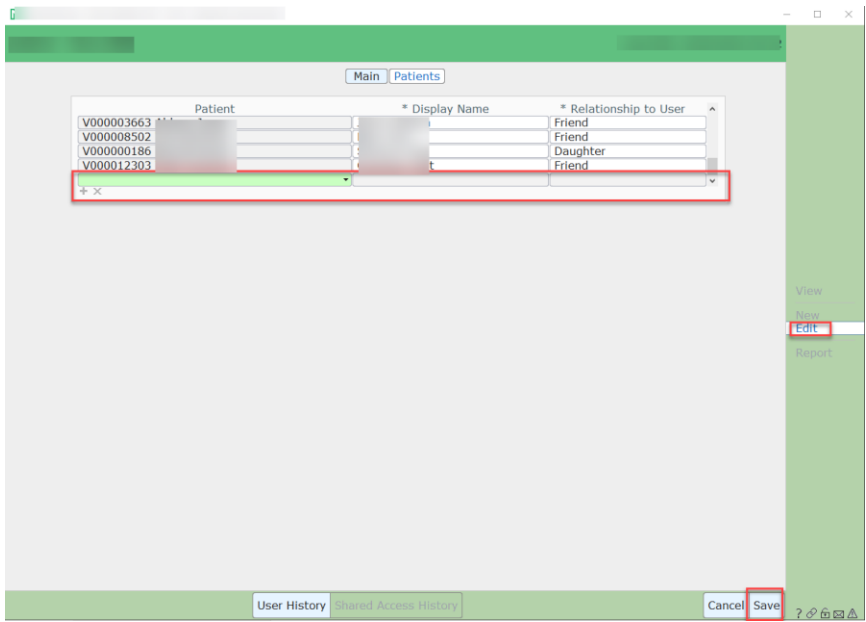
A screenshot of a user search form. At the top, there are two tabs: 'Main' and 'Patients'. Below the tabs is a search box containing the text 'amb,three'. Below the search box is a form with several sections, each with a blue header and white input fields. The sections are: Prefix, First Name, Middle Name, Last Name, Suffix; Address, City, Province, Postal, Residence Code, Phone, Email Address; Birthdate, Sex, Health Care Number; Logon User, Password on File, Active; and Opt Out of Portal News, Opt Out of System Notifications, Opt Out of Automatic Portal Invitatio... The search box and the 'amb,three' text are highlighted with a red box.

3. Once the user is shown, click the **Patient** tab at the top then click **Edit** on the side bar

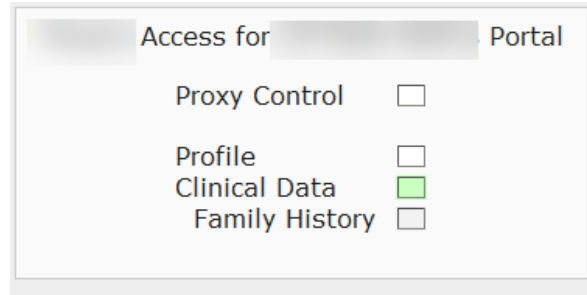


This screen shows what accounts the portal user has access to.

4. To **add** a user, click **+**, fill in display name and relationship to user, then click **Save**, to **delete** a user highlight the user that is to be removed, click **x**, then click **Save**



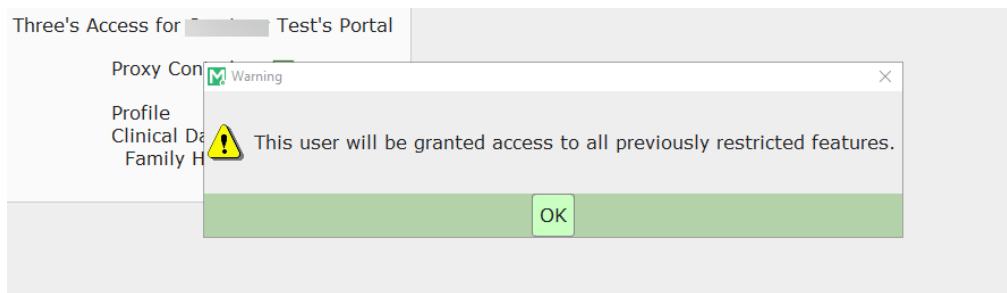
5. Use bottom box to determine access (example: Proxy/ what information is going to be shared)



Access for [redacted] Portal

Proxy Control	<input type="checkbox"/>
Profile	<input type="checkbox"/>
Clinical Data	<input checked="" type="checkbox"/>
Family History	<input type="checkbox"/>

If giving back access that was previously not given, this pop-up will appear to confirm



Once the information is correct, click **Save**