

## Troubleshooting: Proxy Access and Password Reset

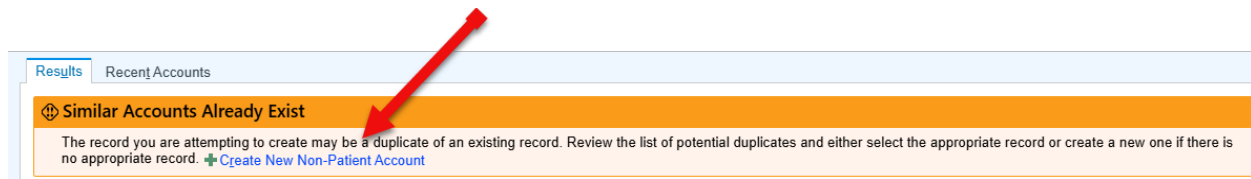
1. Proxy Access for Parent – Parent wants access to their child’s MyChart
  - a. In child’s chart or registration screen, click MyChart icon on storyboard. Select Add or Manage Proxies. Next page will show who can access the patient’s chart. In some instances, it will even show a list of potential Proxies (adults listed as parents or guardians). Click Grant Proxy Access. Will give option to send text or email.
  - b. If no potential proxies are listed, click “Give Proxy Access”. “Find a Proxy” window will open. If parent or guardian (Proxy) is a patient, click search patients. A demographic page may appear. Confirm demographics and click accept. On the next window that appears, select relationship of proxy

The screenshot shows a window titled "Edit Dwight's access to Baby" with a close button (X) in the top right corner. Below the title, there is a section labeled "Access to" with a dropdown menu showing "Baby Zzzgirl". Below that is a section labeled "Relationship" with a search input field containing a red exclamation mark icon and a search icon. A dropdown menu is open below the search field, displaying a table of proxy relationships. The table has two columns: "Title" and "Number". The rows are: "Diminished capacity" (3), "Foster Parent accessing child - READ ONLY" (9), "Foster Parent accessing Child/Teen" (6), "Parent/guardian accessing child - READ ONLY" (8), and "Parent/Guardian accessing Child/Teen" (1). The last row is highlighted in blue. Below the table, there are two buttons: "Accept" with a green checkmark icon and "Cancel" with a red X icon.

Title	Number
Diminished capacity	3
Foster Parent accessing child - READ ONLY	9
Foster Parent accessing Child/Teen	6
Parent/guardian accessing child - READ ONLY	8
Parent/Guardian accessing Child/Teen	1

Click accept after you enter the relationship. Next screen will give option to send a text or email for MyChart activation to proxy

- c. If Proxy is not a patient – select “Create New Non-Patient”. Enter Proxy name and DOB. Epic will search for possible MyChart accounts. In Orange banner at the top, select Create New Non-Patient Account and fill in required fields on next window. Click save and continue to “Relationship Window” and send text or email to proxy.



2. If a patient forgets their password.
  - a. Have them login to MyChart and select “Forgot login information”. Next screen will ask if they forgot username or password. After selection, will send “verify Identity text to phone”. They will need to follow instructions to reset password or username.
  
3. Patient changed phone number and or email.
  - a. Verify correct phone and email are in the patient’s registration.
  - b. Click on MyChart icon on storyboard. MyChart Administration opens.
  - c. Click “Reset” in the Two Factor Authentication field. Pop up asks to confirm you want to take this action. Select “Send Link to Reset Password. A Pop up with the new phone will appear prompting to send text or email.