

## **How Can I Send A Proxy Invitation?**

This tip sheet will review how to send a proxy invitation and how to revoke someone's proxy access to your account.

**Please Note:** The recipient of your proxy invitation must be an existing WellStar patient to accept your invitation.



1. Upon logging into your MyChart account, select 'Share My Record' from your menu



2. Select 'Friends and family access'







3. Within the 'Friends and Family Access' section, select 'Invite Someone'. Within the "Friends and Family Access" screen you can review who has proxy access to your account and accounts you can access. From here, you can revoke access at any time to prevent the listed patients from accessing your MyChart account. You cannot revoke or provide proxy access to accounts you have proxy access to, only your account. To send a new proxy invitation, select "Invite Someone"

| riends  | and Family Access  |         |   |        |
|---------|--|---------|---|--------|
| Vho Can | See My Record?   |         |   |        |
|         | test c<br>Their access is:<br>Full Access<br>Invite sent to:<br>ciara.morton@wellstar.org                | Pending |   | E      |
| hose Re | cords Can I See?<br>Tdrfortysix Zzztdrtst<br><sup>Nickname:</sup><br>Tdrfortysix<br>This is your record. |         | Iptesttwo Zzzbca<br>Nickname:<br>Iptesttwo<br>Access until:<br>2/1/2021 | REVOKE |
| 6       | Tdrfifty Zzztdrtst   | (       | Tdrthirteen<br>Zzztdrtst<br>Nickname:                                   |        |





5. Enter the recipient's name, email, and click 'Send Invite'. Please note: If you are sending an invitation to a person who has never been to a Wellstar facility, they will need to contact the MyChart Help Desk to request MyChart access.

| Invite Someone to Have Access to You  | Record   |  |
|---|--|--|
|   |  | 2  |
| <ol> <li>We will email an invitation to someone you trust.</li> </ol>   | From the email, they can log in to their<br>MyChart to accept the invitation. Please<br>Note: If you are sending an invitation to a<br>person who has never been to a WellStar<br>facility, they will need to contact the<br>MyChart Help Desk to request MyChart<br>access. | 3 They must verify they know you by<br>entering your date of birth.  |
| Who are you inviting?   |  |  |
| * Name  |  |  |
| Where should we send this invitation?   | *Confirm email   |  |
| *By sending this invitation I authorize WellSta<br>indicated above. I understand that the individ<br>medications, diagnoses, progress notes, etc.)<br>access at anytime and can do so in MyChart of<br>*Teens (ages 12-17): I understand that under C<br>permission of my parent or legal guardian and<br>medical record to my parent/legal guardian. | r Health System to grant full access of<br>ual indicated above will have access t<br>as contained within MyChart. I reserve<br>by contacting the MyChart help desk<br>Georgia law I have the right to seek cer<br>because of those rights, I can also au                     | my medical record to the recipient as<br>o view my health record (e.g. labs,<br>a the right to revoke (take back) this<br>at 470-644-0419.<br>tain healthcare treatments without the<br>thorize or restrict MyChart access of my |
| Full Access   |  |  |
| SEND INVITE   |  |  |

6. When your invitation has been sent, it will be marked as 'Pending' on the "Friends and Family Access" screen. If for any reason you need to cancel this invitation, you can do so by clicking 'Revoke'. If you need to correct the email or name on the invitation, you can do so by selecting 'Edit' which will send a new invitation with the updated information

| Friends an | d Family Access                                      |        |   |                 |
|------------|--|--------|---|-----------------|
| Who Can Se | e My Record?   |        |   | _               |
|            | Medicare D Monies<br>Their access is:<br>Full Access |        | ProxyInvite Test<br>Their access is:<br>Full Access | Pending<br>Edit |
|            |  | Revoke | Invite sent to:<br>ciara.morton@wellstar.org        | Revoke          |
|            |  |        |   |                 |
|            |  |        |   |                 |





7. Your recipient will receive an email to accept the invitation. If the recipient is NOT an existing WellStar patient, he/she will not be able to complete sign-up for a new account. He/she will need to request MyChart access from the MyChart Service Desk

| account                    | oxy invite, Tdrfortysix invited you to have access to their MyChart<br>t.   |
|----------------------------|---|
| To conf<br>MyChai          | irm you know Tdrfortysix, click the button below to log in to your<br>t account. This link expires in 30 days.  |
|                            | ACCEPT INVITATION   |
| If you a<br><u>sign up</u> | re a WellStar patient and don't have a MyChart account, <u>click here to</u><br>now   |
| If other<br>8:30 a.r       | wise, please conact the MyChart Help Desk Monday through Friday,<br>n. to 5:00 p.m.Phone: 470-644-0419 Fax: 770-999-2306 Email:<br>thelp@wellstar.org |
| mychar                     |   |

8. Upon clicking the 'Accept Invitation' link, the recipient will need to confirm they know you by entering your date of birth and select 'Accept Invitation'

| Pandora invited | you to have        | access their MyChart accoun  |
|-----------------|--------------------|--|
| * To cont       | irm you know Pande | ora, enter their date of birth.  |
|                 | MM,CO              | (mm  |
|                 | O This is          | required   |
|                 |                    |  |
| AC              | CEPT INVITATION    | DECLINE INVITATION   |
|                 |                    | and the second s |





9. When the invitation has been accepted, you will receive an email stating someone now has access to your MyChart account. If you have the mobile app installed on your phone, you will also receive a push notification of this change



10. Within your MyChart account, on the "Friends and Family Access" screen the "Whose Records Can I See?" section is updated. At any time, either of you can revoke proxy access to each other's account







**Please Note:** Wellstar does not provide patients under the age of 12 with MyChart access. Adults who have proxy access to a patient under 12, cannot send, view or revoke proxy access via MyChart. Instead, these changes must be made in a Wellstar practice or by a Wellstar MyChart Support Coordinator with the appropriate documentation. For required documentation, please refer to our MyChart Help and Support page

## Proxy invitations give default access in MyChart based on age.

| Relationship               | Age   | Proxy Access Given  | Expires at Age |
|----------------------------|-------|---|----------------|
| Adult to Adult             | 18+   | Full Access (Results, scheduling, messaging etc.). This access can be granted with the Proxy Invite feature within MyChart. | Never          |
| *Teen to Adult (Teen Plus) | 12-17 | This access can be granted with the Proxy Invite feature within   | MyChart.       |

**Please note:** If you need further assistance, please contact the MyChart Service desk hours are Monday through Friday, 8:30 a.m. to 5:00 p.m. Phone: 470-644-0419 Fax: 770-999-2306 Email: mycharthelp@wellstar.org

