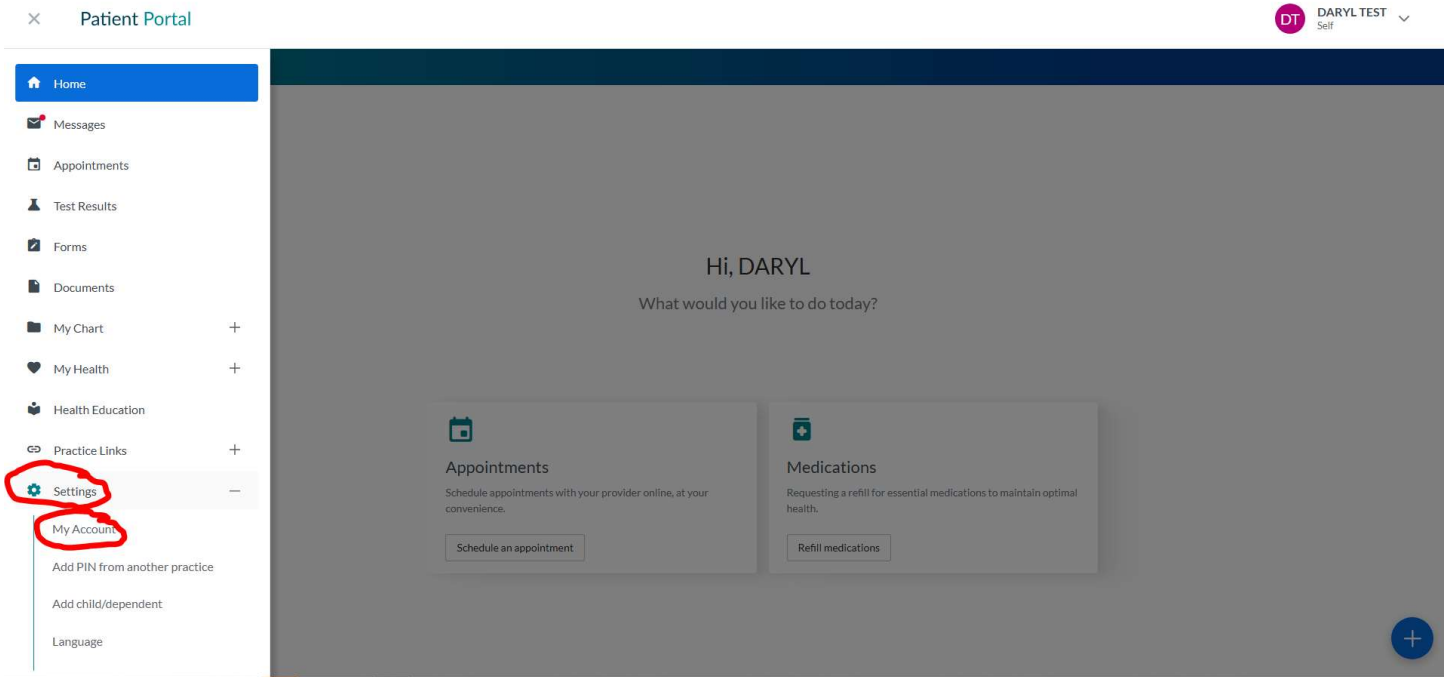
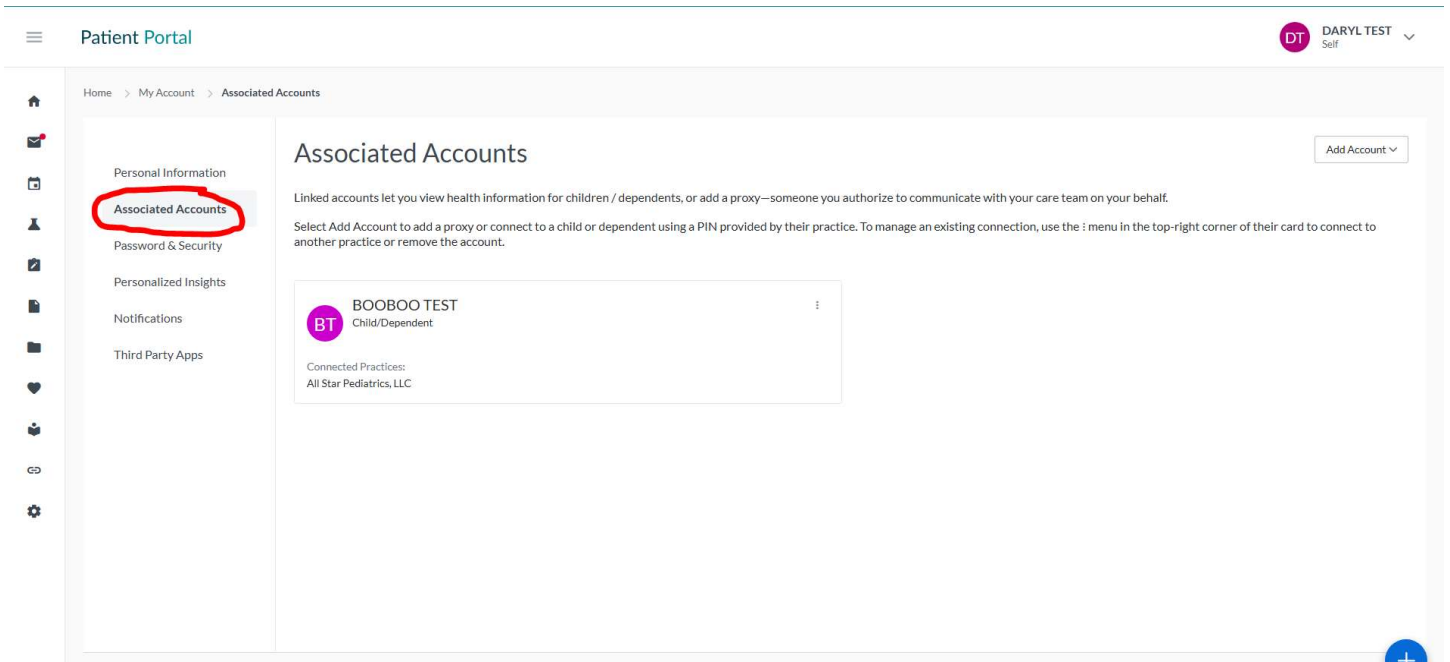


## Adding a Proxy Account – Web Instructions

1. The patient will log into their portal and choose “Settings” and “My Account” on the menu on the left side



2. Select “Associated Accounts”



### 3. Use the “Add Account” drop down menu to select “Proxy”

The screenshot shows the 'Associated Accounts' page in the Patient Portal. The user is logged in as DARYL TEST (Self). The page title is 'Associated Accounts'. Below the title, there is a description: 'Linked accounts let you view health information for children / dependents, or add a proxy—someone you authorize to communicate with your care team on your behalf. Select Add Account to add a proxy or connect to a child or dependent using a PIN provided by their practice. To manage an existing connection, use the : menu in the top-right corner of the account card.' Below this, there is a card for 'BOOBOO TEST Child/Dependent' with a 'BT' icon and 'Connected Practices: All Star Pediatrics, LLC'. In the top right corner, the 'Add Account' dropdown menu is open, showing 'Proxy' (circled in red) and 'Child/Dependent' options. The page footer includes 'Terms and Conditions', 'Privacy Policy', 'About', and '© 2003-2025 Intellicart. All Rights Reserved'.

4. Fill in the Proxy Authorization Form. You will have a choice to limit the amount of time for the person receiving proxy access if you so choose. The system will send an email to the email you provided in the form. The recipient can then follow the directions provided to gain access to the account.

The screenshot shows the 'Proxy Authorization Form' page in the Patient Portal. The user is logged in as DARYL TEST (Self). The page title is 'Proxy Authorization Form'. Below the title, there is a description: 'Proxy authorization allows you to grant permission to an individual who is 18 years of age or older to securely communicate on your behalf. In order for a proxy to obtain access, you must complete the Proxy Authorization Form. You can terminate proxy access via written or online request, or you can revoke access within your online account. To only allow access for a specific time range, you may enter an effective date in the field provided below.' Below this, there is a section titled 'Proxy Information' with the following fields: 'First Name', 'Last Name', 'Sex' (with radio buttons for 'Male' and 'Female'), 'Date of Birth' (with dropdown menus for 'Month', 'Day', and 'Year'), and 'Mobile Phone'. A note at the bottom states: 'This number will be used for account security. Message and data rates may apply.' The page footer includes '© 2003-2025 Intellicart. All Rights Reserved'.