

## Montefiore MyChart Proxy Access Request

### What is Proxy Access?

Proxy Access is a MyChart feature that allows family members and caregivers to securely access another person's MyChart account in order to view health records and communicate with providers on behalf of the person under their care via their own MyChart account.

### Who is eligible to use Proxy Access?

- For children under 11, parent/guardian will be granted full access to your child's MyChart account.
- For children 12 - 17 years, parent/guardian will be granted limited access to your child's Montefiore MyChart account.
- For patients 12 years and older, and who have diminished capacity, parent/guardian/caregiver will be granted full access to your child's chart after approval by a provider. Diminished Capacity means that the patient has a serious medical, psychiatric and/or cognitive condition and/or lacks capacity to manage their medical record. You will be granted full access to the patient's Montefiore MyChart account for the duration as specified by the patient's provider (eg. 1 year, lifelong).
- Caregivers or proxies of adults over 18 years of age can gain access to another patient's MyChart by invitation.

### How do I request or invite Montefiore MyChart proxy access?

1. Log in to your own MyChart account. *If you do not have your own account, sign up to create one – steps below.*
2. Open the menu (top left). Scroll or search for 'Sharing Hub'. Select 'Sharing Hub'.
3. Select the option for 'Family and close friends'
4. Select 'Manage account access'
5. From this page you have options to:
  - a. Invite a family member or care giver access to your account (green).
  - b. Request Parent or Guardian Proxy Access to request access to patients age 0-18 (blue).
  - c. Request Caregiver Proxy Access to request access to patients with Diminished Capacity (red).

# Montefiore MYCHART

DOING MORE TO HELP YOU MANAGE YOUR HEALTHCARE

## Family & Caregiver Proxy Account Access

See your options for requesting access to another person's MyChart or inviting someone to access your MyChart.

### Proxy Invitations

You can invite a family member or close friend to have on-going access to your MyChart to help manage your care. You can revoke access you have granted someone at any time.

No friends or family can see your health info.

+ Invite Friend & Family  
Proxy Access

Select here to invite someone  
to be a MyChart proxy on your  
account

### Proxy Requests

Parents and legal guardians of children under 18 or caregivers of patients with diminished capacity can request Proxy Access to the patient's MyChart in order to help manage their care. You can remove access at any time.



This is your record.

Edit Nickname

+ Request Parent or Guardian  
Proxy Access

+ Request Caregiver  
Proxy Access

Select here to request access to be  
a MyChart proxy for your child  
under 18. Ages 0-11 will be full  
access, ages 11 -17 will be limited  
access. At 18, child must use invite  
proxy workflow above.

Go to Sharing Hub

Select here to request access to  
be a MyChart proxy for your  
diminished capacity family  
member. A provider will need to  
approve this type of access.  
This will be set for the duration  
specified by the provider.

6. Fill out the corresponding form. For proxy requests, please allow up to 7 business days for our staff to process this request. They will contact you by MyChart message with any follow-up. For proxy invites, the patient must accept for you to be a proxy.
7. After your request is approved, you will be able to toggle between your own account and proxy access by selecting the corresponding person in the top righthand menu.

## How Do I Setup my own MyChart Account?

Each person who would like to set up a MyChart proxy account needs to have their own MyChart account. If you are not yet active with Montefiore MyChart, you can self sign up online by navigating to [mychart.montefiore.org](https://mychart.montefiore.org):

1. Select Sign up now button
2. Under the section called "No Activation Code?", select Sign Up button
3. Fill out the form with required fields, you will be prompted to answer Experian questions
4. Remember your username/password created for your new MyChart account login

If you need further assistance, you can call our MyChart Patient Support Line at [855-226-3070](tel:855-226-3070).

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