

## **Connect Patient Portal Proxy Access**

**Effective Date: October 2020**

### **Policy Statement**

Weill Cornell Medicine, NewYork-Presbyterian, and Columbia University participate in Organized Health Care Arrangement (OHCA). The OHCA will maintain all patient information, including information within a patient's medical record, in a confidential manner to protect the patient's right to confidentiality and comply with applicable city, state and federal laws and regulations, including HIPAA.

### **Purpose**

This policy establishes how a patient can grant proxy access to their patient portal account.

### **Policy Text**

The use of portal proxy access for a patient is intended to assist and support a patient in managing their medical care. The patient has the right to grant any adult access to their portal account. Some examples of individuals that may be granted proxy access to the portal include, but is not limited to:

- A parent or legal guardian of a minor child up to the child's 18th birthday
  - The legal guardian of an incapacitated patient
  - The holder of a healthcare power of attorney for a patient
  - Spouse or Domestic Partner
  - Adult child of a parent
  - Other adult designated by the patient
1. The patient or their legally authorized representative (e.g., for a patient who lacks capacity) must sign the Connect Patient Portal Proxy Access Authorization Form.
  2. The workforce member receiving the request shall review the Connect Patient Portal Proxy Access Authorization Form to verify the identity and signature of the applicable party and to ensure the form is properly completed.
  3. The completed form must be placed in the patient's medical record.
  4. The staff member receiving the request is responsible for updating the Connect access to include the proxy, if appropriate.
  5. Questions about the Portal Proxy Access request should be directed to your manager.

### **Granting Portal Proxy Access**

- **Adult**
  - An adult patient may grant any adult access to their Connect patient portal by completing the Patient Portal Proxy Access Authorization form
  - If there is a question about a patient's capacity to authorize access to their portal account, the patient's provider should be consulted to determine if proxy portal access is appropriate to support the treatment of the patient. This information should be documented in the medical record.

- **Legal Representative of an Adult Patient**

Access to an adult's portal account will be granted if the proxy has documented legal authority to make health care decisions. Legal documentation may include legal guardianship of an incapacitated adult or healthcare power of attorney for a patient unable to make their own decisions.

- **Parent/Legally Authorized Representative (LAR) of Minor**

- The parent or LAR will be granted full access to their child's Connect Patient Portal account for a minor who is between the ages 0 – 12.
- On the minor's 12<sup>th</sup> birthday until their 18<sup>th</sup> birthday, the parent or LAR may be granted limited access to the child's Connect Patient Portal account (e.g., access billing features, immunizations) with the permission of the minor
  - Portal proxy access to an adolescent's Connect record must be renewed every two (2) years
  - A provider may revoke or not authorize a parent or LAR's portal proxy access to a minor's record between the ages of 12-18 if they believe their access may interfere with the patient's treatment.
  - Sensitive Information will be withheld from parent/LAR's access in accordance with New York State Privacy Laws. Parent/LAR's access will be automatically terminated when the child reaches their eighteenth birthday

## **Revoking Proxy Access**

To revoke portal proxy access, the patient can remove access directly from their portal account.

- Portal Proxy access may be revoked when:
  - the patient requests to revoke access of the portal proxy
  - a minor reaches the age of eighteen (automatic revocation)
  - the legal relationship with the portal proxy has changed
  - there is a new Personal Representative
  - the provider determines that the portal proxy is not acting in the best interest of the patient
- Weill Cornell Medicine, NewYork-Presbyterian or Columbia University also reserve the right to revoke patient portal proxy access:
  - when the portal proxy violates the terms and conditions of portal proxy access
  - at any time for any reason