



Patient MyChart Sign Up

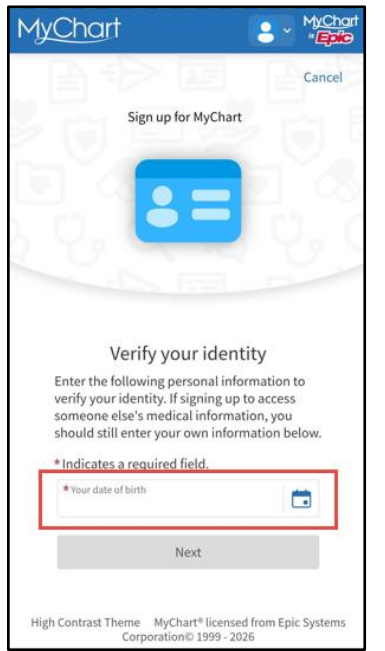
When practices are signing patient/proxy up for MyChart, a link will be sent via email or text to begin the signup process.

In this document practices will be able to guide users on how to:

Setting Up Initial Access	1
Review/Grant Access.....	2
Searching and Adding additional Organizations	3

Setting Up Initial Access

- Click the link within your email or text.
- Enter **Your date of birth**, (for proxy access, proxy must enter their own DOB not the patient's), click **Next**.



- The Username and Password screen will appear. Enter required information and click **Submit**.



The screenshot shows the MyChart login page. At the top, it says "MyChart" and "MyChart by Epic". The main heading is "Choose a username and password". Below this, it says "Create a username and password that is secure and easy to remember." There is a note: "* Indicates a required field." Below this, there is a red-bordered input field for "Username" with a red asterisk and a red warning icon below it that says "This is required". Below the username field, it says "Your password must meet these requirements:" followed by three bullet points: "Between 9 and 256 characters", "Contain at least one uppercase letter and one lowercase letter", and "Contain at least one letter and one number". Below these requirements is a red-bordered input field for "Password" with a red asterisk and a red warning icon below it that says "This is required". At the bottom of the form is a "Submit" button.

- Review terms and conditions and Click **Accept**.

Review/Grant Access

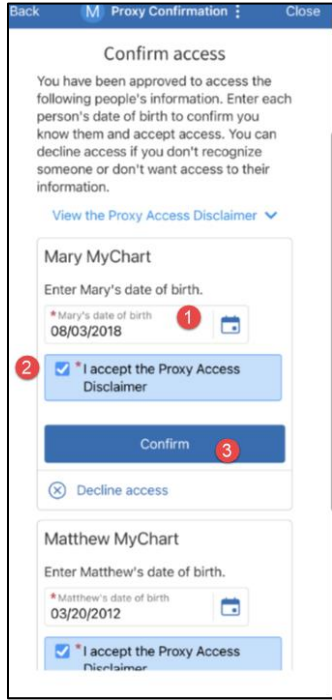
The **Welcome Page** will appear; you must click **Review Access** to gain access to patient information. Please note that if this step is not completed, proxies will not see patient information.

- Click **Review access**

The screenshot shows the MyChart Welcome Page. At the top, it says "MyChart" and "MyChart by Epic". Below this, it says "Welcome, Mother!". There are six icons in a grid: "Billing", "Friends and Family Access", "Learning Library", "Personal Information", "Communication Preferences", and "Change Your Shortcuts". Below the grid is a section titled "Your Updates". The first update has a warning icon and says "You currently do not have verified contact information on file. Update your email address or mobile phone number." with an "Update contact info" button. The second update has a plus icon and says "You have been approved to see the record of Mary and others. Review now to get access." with a "Review access" button highlighted by a red box.



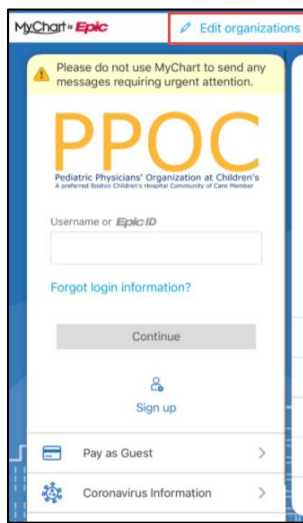
- At the **Confirm Access** screen, enter the patient's **Date of Birth** (1), check **Proxy Access Disclaimer** (2) and click **Confirm** (3).
- Note:** Proxies with multiple children will need to confirm DOB for all children. Children will be listed one underneath the other.



- Click **Done** and access will be granted

Searching and Adding additional Organizations

Users are able to change organizations to toggle between multiple locations on MyChart. Click **Edit organization** then search and select *PPOC*.



- You can then swipe to view and login to other organizations.

[This material contains confidential and copyrighted information of Epic Systems Corporation.](#)

Updated: 3/26/2026

Page | 3



Reviewing Multiple Patients in MyChart

Once all access has been completed for patients, the proxies are able to review the chart and take action.

- You should now see multiple people listed when selecting the carat.

