



How To:

Use the On Behalf Of Feature to Prescribe

Note: Only proxies and prescribing agents are authorized to prescribe on behalf of prescribers.

Note: The experience documented in this guide will require a specific configuration to be enabled. Please reach out to DoseSpot Support for more information.

What's Inside

- Understanding Roles
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Understanding Roles

Understanding the distinction between a Proxy and a Prescribing Agent is essential when managing tasks on behalf of a prescriber. Both roles allow non-NPI holders to support prescribing clinicians within the same clinic by adding and editing prescriptions. However, their permissions differ in how far they can act on the prescriber's behalf:

- **Prescribing agents** can add, edit, and queue both controlled substance and non-controlled substance prescriptions on behalf of a provider. They may also approve and send non-controlled substance prescriptions directly to the pharmacy, but controlled substance prescriptions must remain pending for the provider to review and send.
- **Proxies** can edit prescriptions and queue both controlled substance and non-controlled substance prescriptions as pending, but they cannot approve or transmit any prescriptions to the pharmacy.

Select a Provider

When a proxy or prescribing agent first opens the dashboard, it will appear empty. This is because they do not have any tasks assigned directly to them. To view and manage tasks, they must select the provider they are working on behalf of.

- To do this, click either the **On Behalf Of box** or the **Select Prescriber text**, then choose the appropriate provider.
- Once selected, the provider's tasks will populate on the dashboard.
- Proxies and prescribing agents can work on behalf of **any provider within the clinic**, as there is currently no way to restrict access to specific providers.

The screenshot displays the dashboard interface. At the top left, it says 'Tasks (0)'. At the top right, there is a dropdown menu labeled 'Novus Internal Testing...' and an 'On Behalf of:' dropdown menu, both highlighted with orange boxes. In the center, there is a blue icon of two people, followed by the text 'Act on Behalf Of in Dashboard'. Below this, a message states: 'As a Proxy User or Prescribing Agent, you can view and manage patient tasks in a clinic by selecting a prescriber to act on behalf of'. A green button labeled 'Select Prescriber' is highlighted with an orange box. In the bottom right corner, a modal dialog is open with the title 'Which Prescriber will you be acting on behalf of?'. It contains an 'On Behalf of:' dropdown menu and a 'CONFIRM' button, both highlighted with blue boxes.

Acting as a Proxy

A proxy cannot approve or send prescriptions to the pharmacy and will not be able to progress through these tasks in the UI. They only have view-level access to additional tasks such as RxChange or refill requests. However, proxies are able to:

- **Edit existing pending prescriptions** from either the dashboard or the patient landing page.
- **Add prescriptions to a patient as pending** so the provider can review and approve them later.

Tasks (21)

Novus Internal Testing... On Behalf of: jacqueline prescriber

Pending Prescriptions (13) RxChange Requests (2) Transmission Errors (8)

9 of these Potential Prescriptions will cause drug/allergy interactions.

	Patient Name	Prescription	Quantities	Pharmacy	Entered On	Status	
☐	Glenora Trebbiano Female 03/28/1994 31 Y MRN: -	Adderall Oral Tablet 10 MG Schedule II Substitutions Allowed 30 day supply SIG: Take 1 tablet orally, daily for 30 days. Effective Date: 08/22/2025	Dispense: 30 Refills: 0	Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext Petaluma, CA 94954	Aug 22, 2025 8:29 AM MDT	Awaiting Approval Prior Auth. Required	Edit

Add Prescription

[Choose Pharmacy](#) > [Add Prescriptions](#) > [Review](#)

	Prescription Details	Quantities	Pharmacy	Entered By	Entered On	Status	
☒	Tylenol , 325 MG Capsule Substitutions Allowed SIG: Take one per day Effective Date: 09/04/2025 Minor Drug/Allergy Interaction(s)	Dispense : 30 Refills : 1	Shollenberger Pharmacy, 2002 S. McDowell Blvd Ext. Petaluma, CA 94954	Proxy Agent View Details	Sep 4, 2025 2:00 PM MDT	Active	

CANCEL

SAVE AS PENDING PRESCRIPTION

Acting as a Prescribing Agent

Prescribing agents have greater permissions than proxies. In addition to adding and editing prescriptions, they can also approve and send non-controlled substance prescriptions directly to the pharmacy on behalf of a provider. Prescribing agents are able to:

- **Edit existing pending prescriptions** from either the dashboard or the patient landing page.
- **Add prescriptions to a patient as pending** so the provider can review later.
- **Approve and send non-controlled substance prescriptions** to the pharmacy.
- **Take action on additional tasks** (e.g., RxChange requests, refill requests).

Add Prescription

[Choose Pharmacy](#) > [Add Prescriptions](#) > [Review](#)

⚠ 1 of these Potential Prescriptions will cause drug/allergy interactions.

✓	Prescription Details ↑↓	Quantities	Pharmacy	Entered By ↑↓	Entered On ↑↓	Status	
✓	Amoxicillin Oral Capsule 250 MG Tablets SIG: Take 1 tablet by mouth twice daily Substitutions Allowed Effective Date: 03/03/2026 ⚠ Drug/Allergy Interaction(s)	Dispense: 10 Refills: 0	Capsule — New York, 122 West 146th Street New York, NY 10039	Clinician Prescriber View Details	Mar 3, 2026 4:00 PM EST	Active	: ✕

[Save as Pending Prescription](#) [Print Prescription](#)

CANCEL

APPROVE & SEND

Notifications for Proxies and Prescribing Agents

The notifications a proxy or prescribing agent sees will vary depending on their **On Behalf Of** selection. All notifications are tied to the specific prescriber they are currently acting on behalf of.

- The **notification bell** in the top navigation bar displays all notifications for that prescriber, covering tasks across the entire clinic.
- The **notification icon next to the Patient Overview link** is patient-specific and only shows tasks related to that individual patient.

The screenshot displays the DoseSpot web application interface. At the top, the navigation bar includes the 'dosespot' logo, links for 'Dashboard', 'Patients', 'Favorites', and 'Support', a search bar for 'Search Patient by Name or Birth Date', and a notification bell icon with a red '21' badge, which is highlighted with an orange box. Below the navigation bar, the left sidebar shows the patient's name 'Glenora Trebbiano', their DOB '03/28/1994', and gender 'Female'. The 'Patient Overview' link is highlighted with an orange box and a red '9' badge. The main content area is divided into three sections: 'Patient Information' with details like address, insurance, and contact info; 'Drug Allergies' with a message that no allergies have been added yet; and 'Tasks (9)' which is expanded to show a table of pending prescriptions. The table has columns for Prescription, Quantities, Pharmacy, Entered By, Entered On, and Status. A 'CONTINUE PRESCRIPTION' button is visible in the sidebar, and a note indicates 'You have 1 prescription marked as draft'.

dosespot Dashboard Patients Favorites Support  

Glenora Trebbiano
DOB: 03/28/1994
Gender: Female

Patient Overview 9
Medication History

 **CONTINUE PRESCRIPTION**
You have 1 prescription marked as draft

 **Patient Information**

Address: 16 Barnesdale Rd
Nashua, NH 03062
Phone: (615) 517-8903
[View/Edit Patient Information](#)

Insurance Plan NEW-HMP-G7
Retail: Covered
Mail Order: Covered
Member ID: XWE%248SE3PJ7
[View Coverage Details](#)

 **Drug Allergies**

No allergies have been added yet for this patient
[Add/Edit Drug Allergies](#)

Tasks (9) 

[Pending Prescriptions \(3\)](#) [Transmission Errors \(6\)](#)

☐	Prescription	Quantities	Pharmacy	Entered By	Entered On	Status
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