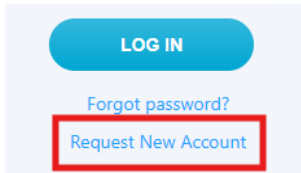


## Site Admin Requests New Site and Users

Your site admin will request new users on behalf of those users.

1. Site admin: go to EpicCare Link site address [carelink.tmh.org](https://carelink.tmh.org) and click **Request New Account**.
2. Click **“Request a New Account”** and **“Site”** from the drop down.



3. Fill out appropriate information for new site and click **“Next”**.

4. Add all necessary users to the new site. Make sure you select the correct user type for the user you want to create (See user type descriptions at end of document).
  - a) Select user type.
    1. Example:

5. Make sure to check the “**Site Administrator**” box for the user that will be overseeing your site’s users.

**Associated Providers: List the providers this user works with**

⚠ Provider name:

**Other**

Comments:

**Site Administrator**

A site administrator is the person responsible for maintaining a site's records. These responsibilities include verifying that user accounts are current, deactivating the accounts of users who are no longer active at the site, and submitting requests to activate new user accounts. Every site must have at least one administrator.

Make this user a site administrator

6. Once you fill out the information for your user, click “**Accept**”.

**Associated Providers: List the providers this user works with**

⚠ Provider name:

**Other**

Comments:

**Site Administrator**

A site administrator is the person responsible for maintaining a site's records. These responsibilities include verifying that user accounts are current, deactivating the accounts of users who are no longer active at the site, and submitting requests to activate new user accounts. Every site must have at least one administrator.

Make this user a site administrator

7. Once you have added all the users at your site, click “**Verification**”.

**Users**

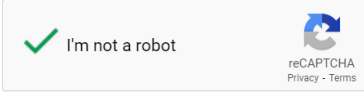
Name	User Type	NPI	Email	Site Administrator
<input type="radio"/> Cena, John H	Clinical Staff		<input type="text"/>	No

8. Read **Terms and Conditions**, Verify, fill out “**Requested by**” field, and select primary contact.


### Verification


Terms and Conditions: identifying information about an individual relating to the individual's health or to the provision of health care to the individual. For example, an individual's health number and/or medical record would be considered personal health information, subject to the Personal Health Information Protection Act (PHIPA).

I agree to the Terms and Conditions above.

Verification: 

 Requested by:

Primary contact: Cena, John H - jherbst@epic.com 

 The primary contact will be used for communication about this request. A verification email will be sent to this address when your request is submitted.







9. Click **“Submit Request”**.

10. Site Administrator must verify email.

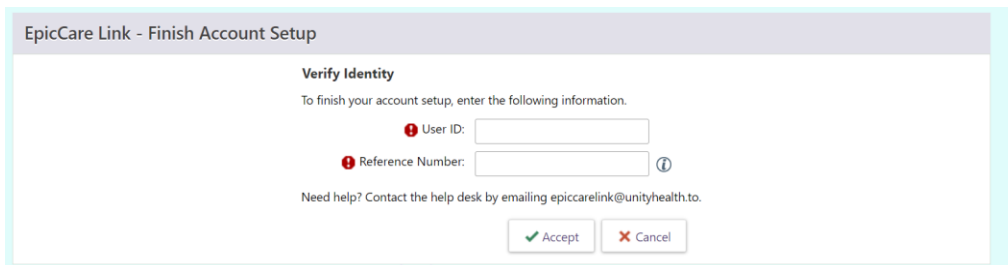
11. Save reference number from verification confirmation email.

## Finish Account Creation

After your site and users are approved, the Site Administrator will all get an email to finish creating their account.

12. Follow the link sent to your email from [donotreplycarelink@tmh.org](mailto:donotreplycarelink@tmh.org).


13. Enter in the User ID from the email and Reference Number from step 11 then click **“Accept”**.





EpicCare Link - Finish Account Setup

**Verify Identity**

To finish your account setup, enter the following information.

 User ID:

 Reference Number:  

Need help? Contact the help desk by emailing [epiccarelink@unityhealth.to](mailto:epiccarelink@unityhealth.to).

14. Create a secure password then click **“Accept”**.

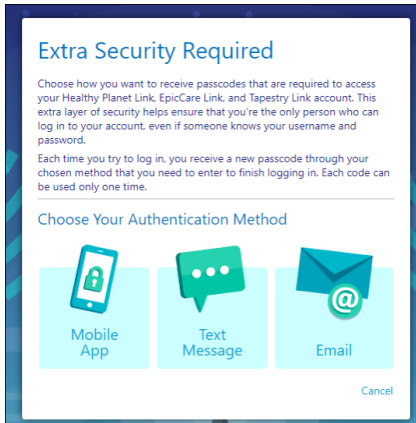
### Password

Congratulations, your identity has been successfully validated. Please select a new password and enter it the same way twice. By default, passwords must be at least two characters long.

Password:

Re-enter password:

15. Log in to your account with the User ID from email and your new password.
16. Complete authentication through preferred means.



17. Type in your contact information (for this example we will use email).
18. Enter the authentication Passcode from your email then click **Verify**.
19. Record your Reset Code in a safe and private place and confirm that you wrote down the reset code by checking the box.
20. Read the Terms and Conditions.
21. Complete Challenge Questions Setup and click **Accept and Continue** when finished.

**Challenge Questions Setup**

Challenge questions may be used to verify your identity in lieu of a password. Please choose 4 questions and their

Questions	Answers
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

You must answer all of the questions you have selected

22. Account setup is now complete!

## Set your users' temporary passwords

23. On the toolbar, click "**Admin**".
24. Under "My Groups" you will see an alert asking you to set your users' initial passwords. Click on one of your users' names.
25. Fill out a password for your new user as well as a Password Change Reason of "New user".
  - a) Enter **YOUR PASSWORD** for the last prompt.
26. Repeat step 25 for all site users.

## EpicCare Link User Type List and Description

### *Provider:*

These users are responsible for patient care in community clinics.

Specifically, these users:

- Search for or create patient records
- View all patient clinical information
- Place orders
- Communicate with staff

These users do not typically schedule appointments for patients.

### *Clinical Staff:*

These users are responsible for supporting clinical workflows in community clinics.

This template is specifically designed for nurses and clinical support staff.

Specifically, these users:

- Search for or create patient records
- View all patient clinical information
- Place orders on behalf of their responsible provider
- Schedule video visits
- Communicate with staff

These users do not have their own provider record.

### *Non-Clinician:*

These users are responsible for scheduling and obtaining basic patient information in a community setting.

Specifically, these users:

- Search for or create new patient records
- Monitor office communications
- Review orders
- Create new referrals
- View limited patient information, including demographics and insurance coverage

These users do not have access to place orders.

### *Continued Care Services Coordinator:*

These users are responsible for supporting clinical workflows in community skilled nursing facilities, nursing homes, and community resources.

Specifically, these users:

- Review and accept or reject patients through the continued care and services

request workflow

- Search for or create patient records
- View all patient clinical information
- Place orders
- Communicate with staff
- Document capacity at their facility

These users do not have access to analytical tools.

#### *Research Monitor:*

These users are external research monitors who review charts for patients on studies to ensure the quality and safety of the study.

Specifically, these users:

- Review patient charts
- Can only view charts of patients the study coordinator has designated

These users do not have the ability to search for patients, create new patients, place orders, schedule appointments, or send or receive messages.

#### *Biller:*

These users are responsible for reviewing medical services and associated charges for billing purposes.

Specifically, these users:

- Review clinical documentation for medical billing
- View schedules for the providers they work with
- View insurance coverage information

These users do not take part in patient care and can't search for or create patient records.

#### *Specimen Collector:*

These users are responsible for collecting lab specimens. They require access to lab tools.

Specifically, these users:

- Search for or create patient records
- View limited clinical information such as results, allergies and medications
- View insurance coverages information
- Order labs
- Document the collection of a specimen, create packing lists, and print labels
- Communicate with other staff

These users cannot view all patient information or otherwise document on the chart.

*Care Coordinator:*

These users are responsible for using Healthy Planet Link to coordinate patient care and complete care management workflows. They are typically community care managers.

Specifically, these users:

- View population dashboards to gauge performance, track attributed patients, and identify at-risk patients
- Review data about their patient populations and explore possible trends
- Place orders
- Update care plans.