EpicCare Link

Quick Start Guide
EpicCare Link
Community User
May 2024

Central East
Clinical Information System
AN EPIC TRANSFORMATION

Quick Start Guide
Epiccare Link

Getting Started

EpicCare Link is a tool that provides real-time web access to patient information so you can access patients' clinical data and communicate with the Central East Ontario Hospitals to provide quality patient care. You can also use EpicCare Link to quickly refer patients to the hospitals.

EpicCare Link is a collection of different web pages, or activities, that correspond to different tasks. The activity that you use depends on what you want to accomplish.

This guide takes you on an introductory tour of EpicCare Link. The first pages include information to help you get started, such as browser requirements and how to log in. The rest of the guide contains explanations of how to use EpicCare Link.

> **!** Each organization configures Epic differently, so what you see in this guide might differ from what you see in your system.

Help and contact information

For help using an activity, click ❓.

- If you forget your password or can't log in, call (416) 284-8131 x2492

Browser, system, and connection requirements

You must use one of the following Internet browsers to access EpicCare Link:

- Google Chrome 50 and any later versions
- Microsoft Edge version 79 or later
- Microsoft Internet Explorer 11

EpicCare Link requires a minimum screen resolution of 1024x768 pixels. We recommend that you use a high-speed Internet connection to achieve the best system speed and performance.

How do I log in?

1. Open your web browser and go to https://carelink.ourepic.ca/EpicCareLink-PRD/.

2. Enter the user ID and password that you received for EpicCare Link.

3. Enter your single-use passcode.

> Note: You will utilize a single-use passcode after you establish a method of receiving the single-use passcode the first time you log in.
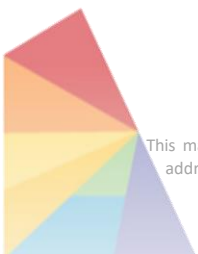
An _Epic_ Implementation in Partnership with Central East Ontario Hospitals

Set up an authentication method

When you first log in with your username and password, you're prompted to choose how you receive single-use passcodes that are required to access your account. This extra layer of security helps ensure that you're the only person who can log in to your account, even if someone knows your username and password.

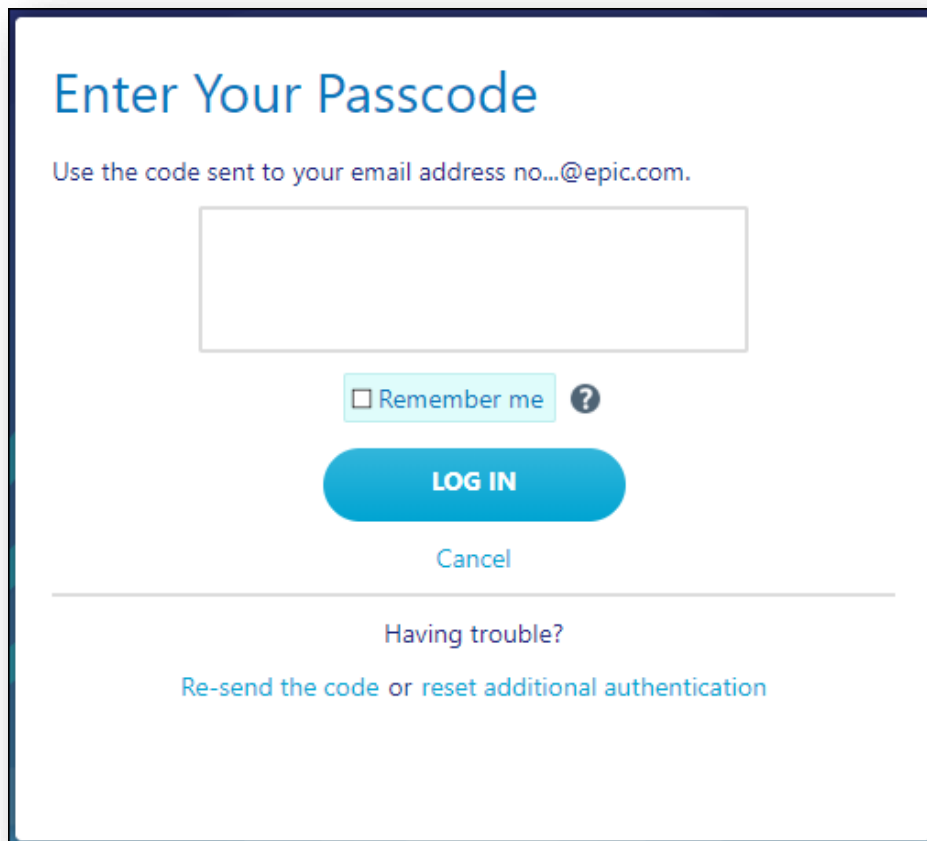You can receive the passcodes through a mobile application, a text message, or email. Each time you try to log in, you receive a passcode through your chosen method that you need to enter to finish logging in. Each passcode can be used only one time.

After you enter the passcode, you can select the **Remember me** check box to indicate that you're using a device that's not shared with anyone else. This means that you won't be asked for a passcode the next time you sign in from the same device for 30 days. Note that if you log in through a different device or browser, or your browser's settings are reset, you are still prompted for a passcode.

Record your reset code

When you set up an authentication method, the system gives you a reset code to use if you need to change how you receive passcodes. For example, if you get a new smart phone you can use the reset code to set up your new phone to receive passcodes.

An _Epic_ Implementation in Partnership with Central East Ontario Hospitals

Write down the reset code that appears on the screen and keep it private. You need to enter the reset code from the login screen if you need to change your authentication method. Note that you can also use this code to change your authentication method from the Settings menu after you log in.

> **!** A new passcode is sent to you each time you log in. Enter this code to complete the login process.
>
> Unlike passcodes, the reset code appears only once after you set up your authentication method. Use this reset code only if you need to change how you receive passcodes.

An *Epic* Implementation in Partnership with Central East Ontario Hospitals
This material contains confidential and copyrighted information by **Epic** Systems Corporation and intended solely for the use of the individual or entity to which they are addressed to. It is strictly forbidden to share, disclose, or reproduce any part of this message or it contents without expressed written consent.
Page: **6** of **32**   Last Updated: **9/5/2024**

Navigating in EpicCare Link

When you log in to EpicCare Link, several sets of navigation tools appear at the top of the page.

A. **Navigation Tabs:** Use these tabs to open different activities in EpicCare Link. Each tab contains one or more related activities. For example, the **Patient** tab contains patient-specific activities. When you click a tab, the default activity for that tab opens.

B. **Activity Menu:** Use this menu to open the various activities that are contained in the selected navigation tab. For example, the **Patient** tab activity menu contains the **Allergies** and **Chart Review** activities.

   - If there are more activities than can fit on the screen, hover over the ellipsis on the far right of the menu to see all the activities contained in the tab.
   - You can also click ⚲ to pin an activity so it appears first in the menu. If you pin multiple activities, they appear in the order that you pinned them. Click and drag pinned activities in the menu to change their order.

C. **Action Options:** Use these buttons, located on the top right of the screen, to see all of your available activities or to log out.
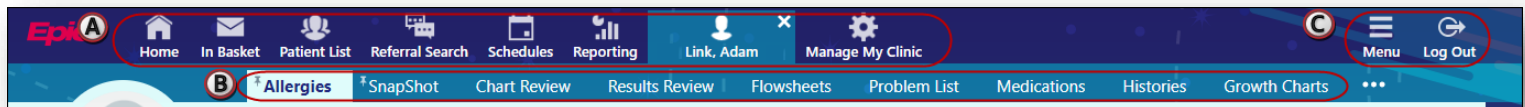
How do I log out?

To maintain patient confidentiality, you need to log out or secure the screen when you are done working or have to leave the computer for any reason. There are two ways to do this:

1. Click ⟲ **Log Out**. The next time you log in, you are directed to your start page.

2. Click 🔒 Secure **Secure**, which is available under the **Menu**. You will be directed back to the activity and/or patient you were on when you selected **Secure.**

Accessing the Patient Chart

Select your patient's chart from a list of current patients

1. Click 👤 **Patient** and go to the **My Patients** tab.

If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name.

2. Click a patient's name to open his chart.

3. To view a list of currently admitted patients, select the **Patient List** navigation tab and select the tab for admitted patients. For patients to appear on this list, you must have a provider relationship of PCP, attending, admitting, or treatment team on the admission.

4. Select a patient's name to view additional patient-specific information in the report pane.

5. If you view a report frequently, click 🔧 to add a button for the report to the toolbar. From that page, you can also remove your report toolbar buttons, rearrange the order of buttons, and rename the reports.

6. Click 📁 to open a patient's chart.

> ℹ️ To see only the patients for whom you are the PCP, select your name in the **Filter by provider** field.

Search for a patient's record based on name or MRN

1. Click 👤 **Patient** and enter the patient's name or MRN.

2. In the Search Results window, click the name of the patient whose chart you want to open.

> ℹ️ In two clicks, you can quickly open a patient chart that you recently had open. In the **Search My Patients** section of the Patient Search activity, select the **Recent** tab and then click the name of the patient.

What if I can't find a patient?

If you don't find a patient using the methods above, you might not have been granted access to her chart yet, or she might not have a record in the system. Use the Search All Patients section of the Patient Search activity when you need to gain immediate access to a patient's chart for the first time, such as in the case of an emergency. Note that you must enter the patient's first and last name when using this method.

1. If your initial search returns no results, click **Search All Patients** from the Search Results window.

2. Complete all of the required fields, and then click 🔎 **Search**.

3. Select the patient record you want to open, select the reason you need access to the patient's chart in the **Reason** field, and add any comments. Enter any additional comments and click ✔ **Accept**.

> ℹ️ *If the patient's record doesn't exist, you can create one in EpicCare Link by clicking **Create a New Chart** in the Patient Search activity.*
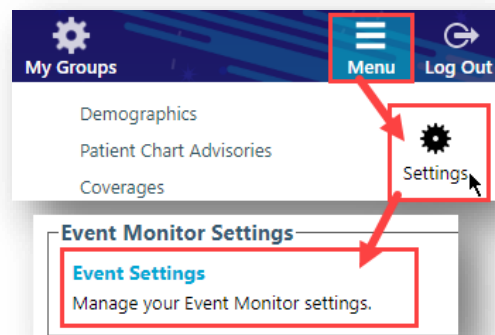
Monitoring Your Patients

Event Monitor allows you to monitor events that occur in your patients' care, such as inpatient admissions or discharges, outpatient visits, or new lab results. You can view these events on the home screen or in your In Basket.

Target your event notifications

To focus on the medical events that matter most to you, use event and relationship filters in **Event Monitor**. You can tailor which types of events you're notified of and for which patients. For example, you can choose to be notified of only the events associated with you or certain providers in your group. You're associated with an event if you're the attending provider, admitting provider, referring provider, a treatment team member, a care team member, or the patient's PCP.

1. Go to **Menu > Settings > Event Settings**.

*An **Epic** Implementation in Partnership with Central East Ontario Hospitals*

This material contains confidential and copyrighted information by **Epic** Systems Corporation and intended solely for the use of the individual or entity to which they are addressed to. It is strictly forbidden to share, disclose, or reproduce any part of this message or it contents without expressed written consent.

Page: **9** of **32**   Last Updated: **9/5/2024** by **Brad Whitehead**

2. Choose which types of events you'll receive notifications for in the Event Filter section.

3. Choose which events you'll receive notifications for by selecting one of the options in the Relationship Filtering section:
   a. **All events for patients in my group**. This option includes events for any patient that you have access to. For example, if you choose to receive referral notifications, you are notified of any authorized referrals, even if the referral isn't to you or your group.
   b. **Only events associated with my group.** For example, if a patient you have access to is admitted to the hospital, and the patient's PCP is in your group, you receive a notification even if the PCP isn't associated with the admission.
   c. **Only events associated with me (recommended)**.
   d. **Only events that I select**. This option includes only events associated with the providers or departments you select.

4. Choose who your notifications are sent to in the In Basket Settings section:
   a. **Any user in my group**. Your notifications are sent to a group of users at your organization, and any of the users can access the message and mark it as Done, which removes it from the In Baskets of all the users in the group. This option helps reduce the risk of duplicate follow-up and can save time.
   b. **Only me**. You are the only user who can mark the notifications as Done. Other users might still see and act on the same notifications, but they can't mark the message as Done. This option helps ensure that you see every notification.

An *Epic* Implementation in Partnership with Central East Ontario Hospitals

This material contains confidential and copyrighted information by **Epic** Systems Corporation and intended solely for the use of the individual or entity to which they are addressed to. It is strictly forbidden to share, disclose, or reproduce any part of this message or it contents without expressed written consent.

Page: **10** of **32**   Last Updated: **9/5/2024**

View a patient's recent events

Select the **Home** tab and hover over each type of event in the Event Monitor section to review recent events for your patients.
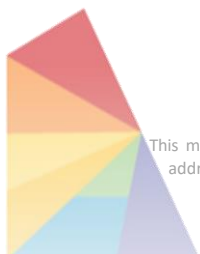
If necessary, you can view more information about events and mark them as Done in In Basket by clicking the name of the patient in the Patient column.

Open a patient's chart from an event message

Select the In Basket message for the patient's event and click 🔹 **Select Patient** to open the patient's chart.

Reviewing the Patient's Chart

Review the patient's chart before a visit

1. Open the patient's chart, click **Chart Review**, and select a tab that includes information you want to review.

2. To view more detail, such as a specific patient visit, click the date link that appears in the row.

> ℹ️ To view details on several rows at once, select the check boxes in those rows, and then click 🗒️ *Start Review*.

3. To send a message to the patient's PCP regarding an office visit, click **Ask a Question**, fill out the message form, and click ✔️ **Send Message**.

Find information quickly in the patient's chart

For patients with large charts, you can enter text in the **Search Chart** field in the Patient Storyboard on the left to quickly find the information you need. For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as lipid panel results and progress notes that mention cholesterol.

Use filters to narrow the list of information you see

You can also use filters to find visits, labs, medications, or other information in Chart Review. For example, on the **Encounters** tab, you can filter the list so you see only the visits associated with certain providers.

1. In Chart Review, select a tab.

2. Click ▼**Filters** and select a filter type. Then, select check boxes next to the values that you want to see. For example, select Encounter Type, and then select the Billing Encounter filter.

3. Click ✔ **Apply** to make the results of your search appear.

> ℹ️ To remove the search criteria and begin a new search, click 🧹 *Clear All*.

View trending data in graph or table format in Chart Review

1. In Chart Review, select the check box for the data you want to view. For example, select specific visits or lab tests.

2. Select the type of flowsheet that you want to create.

   ▫ Click 🏢 **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.

   ▫ Click 🏢 **Lab Flowsheets** to graph lab result data.

3. Click and drag to select the table cells that contain data that you want to graph.

4. Click ✎ **Line Graph** or ▊▊ **Bar Graph** to create a graph of the selected data.

View a patient's trending lab results in Results Review

1. Select the **Patient** tab and click **Results Review**. Select the patient you want to view.

2. Select the date range for the results data you want to see and click ✔ **Accept**. Note: you can default this range in the future if you'd like.
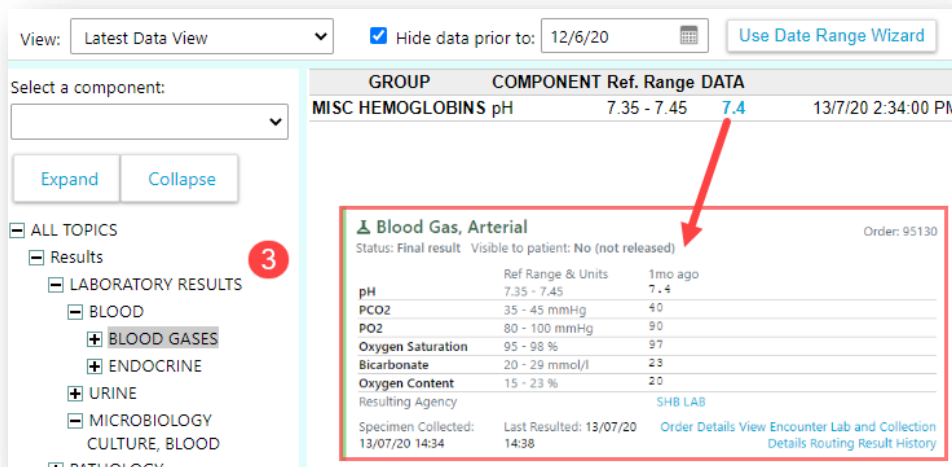
3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left. Select the name of the component or component type that you want to view.

4. To view more columns of results, click ◀ **Load More**. To view all columns of a patient's results for the time range that you selected, click ◀◀ **Load All**.

> ⓘ Click ⏱ *Time Mark* so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen.

Customize the way results appear

1. In Results Review, click ▤ **Options**.

2. To make the most recent results appear from left to right by default, select the **Trend Dates in reverse chronological order** check box.

3. Set your other default preferences, such as the default number of columns to show, using the other options.

4. Click ✔ **Accept**.

View a patient's allergies

Select the **Patient** tab and click **Allergies**.

> ⓘ For more information about an allergy, select the allergy and click 🔁 *View History*.

View a list of the patient's current medical problems

Select the **Patient** tab and click **Problem List**.

> ⓘ For more information about a problem, click the 🗎 **View Details.**

View a patient's current medications

Select the **Patient** tab and click **Medications**.

> ⓘ If you don't see the Medications tab, hover over [•••] for additional headings.
>
> For more information about a medication, click 🗎 **View Details**.

View a patient's history

Select the **Patient** tab and click **Histories** to see a report with information about the patient's medical, surgical, family, and social history. Social history includes topics like tobacco use and sexual activity.

An *Epic* Implementation in Partnership with Central East Ontario Hospitals

This material contains confidential and copyrighted information by **Epic** Systems Corporation and intended solely for the use of the individual or entity to which they are addressed to. It is strictly forbidden to share, disclose, or reproduce any part of this message or it contents without expressed written consent.

Page: **16** of **32**   Last Updated: **9/5/2024**
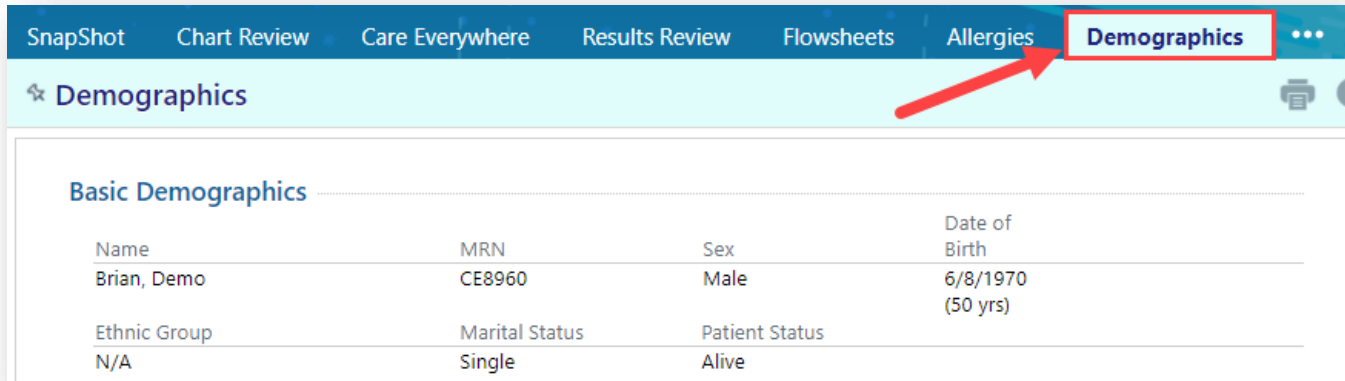
> ℹ️ For a high-level summary of the current patient's chart, select *SnapShot* from the Clinical Review menu.

View a patient's demographics

Select the **Patient** tab and click **Demographics** to see a report with demographic information like the patient's address, PCP, emergency contacts, and more.

Uploading Files to the Patient Chart

Upload a file

You can attach a file to the patient's chart, such as an electronic copy of exam notes. The file is sent to an administrator at the Central East hospitals who verifies it before it's added to the chart.

1. Drag and drop a file from your computer into the section below the patient's photo on the left side of the screen. Alternatively, click **Upload document** on the left side of the screen to open a window where you can drag and drop the file.

   □ If you don't want to drag and drop a file from your computer, click **Add file** to browse for the file on your computer and select it.
   □ Any files that you add must be smaller than the maximum allowed file size and be of an appropriate type.

   · The maximum allowed file size appears in a message below the **Add file** button.

   · To see which types of files you can add, hover over ⓘ .

2. Select a document type for the file, such as a study attachment.

3. Enter a description of the file.

4. If the Message for reviewer section appears, enter a message for the administrator who review files.

5. Click **Submit for Review**. If you want to remove a file that you selected, click ✖.
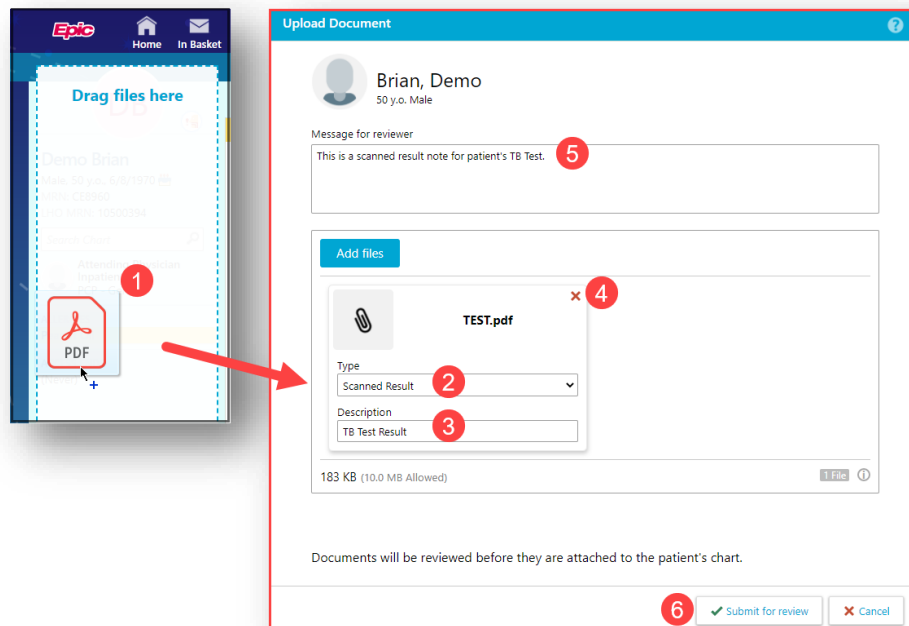
Placing Orders

Place a new order

1. Select the **Patient** tab and click **Order Entry**.

2. Select an ordering clinic and authorizing provider and click ✔ **Accept**.

3. Click ⊟ **Preference List** to see a list of available orders.

4. Select the check box next to each order that you want to place. Use the subsections in the left pane to filter orders by type.

5. Click ✔ **Accept Orders** to review a list of your orders and make any necessary changes before signing them.

6. If there's a required (🛑) or recommended (⚠) icon next to an order, you can enter more information. Click an order's name to edit details like quantity.

7. Accept and sign the orders.

8. If there's decision support associated with any of the orders, select a follow-up action and click ✔ **Accept**.

9. Enter your password if prompted and click ✔ **Accept**.

> ℹ️ If you already know the name of the order in EpicCare Link, you can search for it in the *New procedure* field.

> ℹ️ Enter a partial word in a field instead of a whole word to reduce the amount of time you spend typing.
>
> For example, entering *"ref"* in the *New procedure* field in Order Entry shows you all of the procedures beginning with *"ref. "* You can use this shortcut for any information that is stored in the database, such as procedures and other providers' names.

Save an order for later

Pend an order to save it for later. For example, you might pend an order if you need to review information in the patient's chart before you finish filling out the order details.

> 📄 Refer to p. 19 for more information about placing orders.

1. From the Order Entry activity, select the order that you want to place.

2. Click the order name to edit its details as needed.

3. Click 🖫 **Pend Orders**.
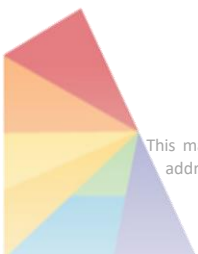
An *Epic* Implementation in Partnership with Central East Ontario Hospitals

Continue a pended order

When you return to the Order Entry activity, you can resume any orders that you pended. You can also see orders that were pended by other people at your site. For example, you might have support staff who prepared an order for you to sign.

Click ➡ **Continue Order** to resume editing a pended order.

> ℹ You can jump to the Order Entry activity from your In Basket to edit a pended order. From your **My Unsigned Orders** In Basket folder, click 🗒 **Order Entry**.

Cancel a signed order

1. Select the **Patient** tab and click **Order Review**.

2. Select and cancel the order.

3. Enter a reason for canceling and click ✔ **Accept**.

Working with Referrals

Create a new referral

To create a referral, you might be required to enter information such as the referring and referred to providers, procedures to be performed, or diagnoses associated with the referral. You can also enter notes to communicate other information about the referral.

1. Select the **Patient** tab and click **Order Entry**.

2. Click 📋 **Preference List** to see a list of available orders.

3. Click **Referrals** and select the referral you want to order.

4. Click ✔ **Accept Orders**.

5. In Order Entry, click the link for the referral to add information such as attaching any relevant files, and enter any comments. Click ✔ **Accept** when you're finished.

6. Click ✔ **Sign Orders**.

7. Enter your password if prompted and click ✔ **Accept**.

View a list of referrals for a patient

1. Select the **Patient** tab and click **Referral by Member**.

2. The patient's active referrals appear, including any that are new, open, authorized, or pending review. To see all referrals, select **Show All Referrals** in the **View Option** field.

3. For more information about a referral, click the referral ID link to view a report.

An *Epic* Implementation in Partnership with Central East Ontario Hospitals

> You can't edit a referral that you've already created, but you can add additional notes or attachments to it and send a referral message.

View a list of referrals for specific providers or locations

1. Select the **Referral Search** tab.

2. Select either **Incoming** or **Outgoing** depending on whether you want to see referrals sent to or from your organization.

3. In the **Referred To** or **Referred By** section, select one or more providers or locations.

4. In the **Referral Status** section, select each referral status that you want to include in your search results.

5. If you selected **Outgoing** in step 2, select a scheduling status in the **Scheduling Status** section.

6. Enter dates in the **From** and **To** fields to limit your search to particular dates.

7. Click **Search**.

8. For more information about a referral, click the referral ID link to view a report. Click 📂 to open the associated patient's chart.

Viewing Upcoming Appointments

The Upcoming Appointments reports sort appointments by patients in a particular patient group, if applicable, and then by date and time.

View upcoming appointments for your patients

1. Choose the upcoming appointments report you want:
   a. To view a report for all of your patients, select the **Schedules** tab and click **Upcoming Appts - My Patients**.
   b. To view a report for one patient, select the **Patient** tab and click **Upcoming Appts - Patient**.

2. Click the double arrow (⌃) icons to collapse or expand a section.

In Basket: Viewing Messages

In Basket is a quick and easy way to communicate with your colleagues. From here, you can view and sort messages, search for messages based on a number of criteria, and respond to your messages.

Select the **In Basket** tab to access your messages. Folders that group types of messages appear in the left pane. For example, you might see **CC'd Charts** or **Referral Authorization** folders. If you have new messages, the folder title appears in bold, and the number of new messages appears in parentheses next to the folder name. If you have a new high-priority message, the folder appears with a red arrow.

> A count of your unread In Basket messages appears on the *In Basket* tab so you can see whether you have any new messages without having to open your In Basket.
>
>

View a message

1. Open the **In Basket** tab.

2. Select the folder for the type of message you want (for example, **Result Notifications**).

3. Select a message to read its contents.

Indicate that you're working on a pool message

When an In Basket message is sent to a pool that you're a part of, click the ? icon to take the baton for the message. The ? icon becomes a + icon, which indicates to other members of the pool that you're working on the message.

If you need to stop working on a message before you're able to complete it, click the + icon again to pass the baton back to the pool. The message then appears with the ? icon.

If another member of your pool is working on a message, it appears with a — icon.

Search for a message

1. Click 🔍 **Search**.

2. Enter as many search criteria as you want and click ✔**Search**. You can search by patient, message type, status, recipient, priority, date, or any combination of these.

3. To return to your normal In Basket view, click **My In Basket**.

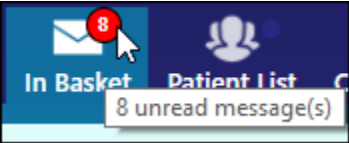### An *Epic* Implementation in Partnership with Central East Ontario Hospitals

Print multiple messages at once

If you are working with a paper system, you can print multiple In Basket messages to keep on file. Note that you can print multiple messages at once only for certain message types.

1. Select the folder containing the messages that you want to print and select the check boxes next to the messages that you want to print.

2. Click 🖶 **Print Selected**.

3. Select the right print settings and print the messages.

In Basket: Sending Messages

In Basket is a communication hub where you can send and receive secure messages similar to email. Messages are sent to individual recipients or to a number of recipients grouped in a class or a pool.

You can also associate a patient with the message using the **Patient** field on the message form so that the recipient can refer to the patient's chart.

Send an In Basket message

1. Select the **In Basket** tab, click the arrow next to 🖹 **New Msg**, and select the type of message you want to send.
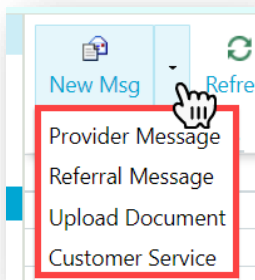
2. In the **To** field, completion match on the name of the person or group to whom you would like to send your message. To see a list of all possible recipients, click 🔍.

3. Enter a brief subject in the **Subject** or **Summary** field.

4. If you are sending a message regarding a patient, either click **Use <patient name>** to pull in the patient's name, or search for a different patient. This attaches the patient's name to the message.

5. Complete any other required fields.

6. Enter your message in the **Note** field.

7. When you are finished, click ✔ **Send Message**.

Reply to or forward a message

Click a message to select it.

- ▪ To reply to a message, click 🔁 **Reply**.
- ▪ To forward a message, click 🔁 **Forward**.

Note: Reply and Forward options might not be available depending on the message you've received.

View messages you've sent

1. Select the **In Basket** tab and click **My Out Basket**.

2. Select a message type and then select a particular message to view it.

3. To return to your In Basket, click **My In Basket**.

In Basket: Sharing In Baskets with other users

Sharing an In Basket allows one users to have full access to another user's In Basket. A use case for this might be a physician who wants their office staff to monitor all messages in their In Basket as part of an office workflow.

In order for this to occur, **BOTH** the user who wishes to share their In Basket, must grant access to another user & the receiving user must attach that In Basket to their account

To Grant Access to your In Basket to another user

1. This can be done in EpicCare Link OR in Hyperspace. Physician Site Administrators should grant/revoke access to their In Basket via Hyperspace

1. Select the **In Basket** tab/activity

2. Click the **Attach** button

3. Click the **Grant Access** tab

4. Search for the correct user in the system

5. If you are using EpicCare Link:

   - Click on the User's name

   - Click **Save**

   - Click Return to In Basket

6. If you are using Hyperspace

   - Click on the User's name

   - Click **Save**

   - Click **+ Grant**

   - Click ✔ Accept

To Revoke Access to your In Basket

1. Follow Steps 1-3 in section above labelled "To Grant Access to your In Basket"

2. If you are using EpicCare Link:

   - Click on the User's name

   - Click **Remove**

   - Click Return to In Basket

3. If you are using Hyperspace

   - Click on the User's name

   - Click the ✖ next to the patient's name

   - Click ✔ Accept

To Attach another User's In Basket to Yours

1. Select the **In Basket** tab/activity

2. Click the **Attach** button

3. Ensure you are on the **Attach** tab

4. Search for the user who has granted you access.

5. You can select to Show or Hide the In Basket by changing the tickbox in the column **Show In In Basket**

6. Click ✔ Accept

To Remove an Attached In Basket

1. Select the **In Basket** tab/activity

2. Click the **Attach** button

3. Ensure you are on the **Attach** tab

4. Select the tickbox for the appropriate user.

5. Click the – Remove button

6. Click ✔ Accept

View messages you've sent

1. Select the **In Basket** tab and click **My Out Basket**.

2. Select a message type and then select a particular message to view it.

3. To return to your In Basket, click **My In Basket**.

An *Epic* Implementation in Partnership with Central East Ontario Hospitals

Viewing Releases of Information

Use the Requests activity to view released portions of a patient's record. The data that you can view in the patient's chart is predetermined and is limited to the information that you need to accomplish your specific task.

Send a request for a patient's record

1. Select the **In Basket** tab, click the arrow next to **New Msg**, and select **Customer Service**.

2. In the **Topic** field, select **ROI Request**.

3. Fill out information about the release request, such as the patient's name and why you are requesting the release of information.

4. Click **Submit**.

Access your releases of information

1. Select the **Requests** tab.

2. If there are too many requests, search using the **Requester**, **Requested From Date**, or **Requested To Date** fields.

3. Click the link for the information that you need to see.

4. To print your report, click .

> ⓘ When the reports are something other than PDFs, you can select the check box next to each report you want to view and click *View Selected Reports* to view multiple reports at the same time.
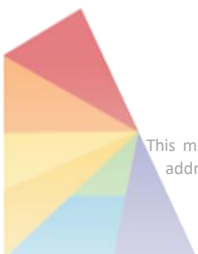
Viewing Reports

From the Catalog activity, you can view standard reports with relevant analytical data so you can track and follow up on trends.

Access your reports

1. Select the **Catalog** tab and click **My Reports**.

2. Click the report's link to view the most recent version of the report. To view a previous version of the report, expand the Previous Copies section and select the date of an available report you'd like to view.
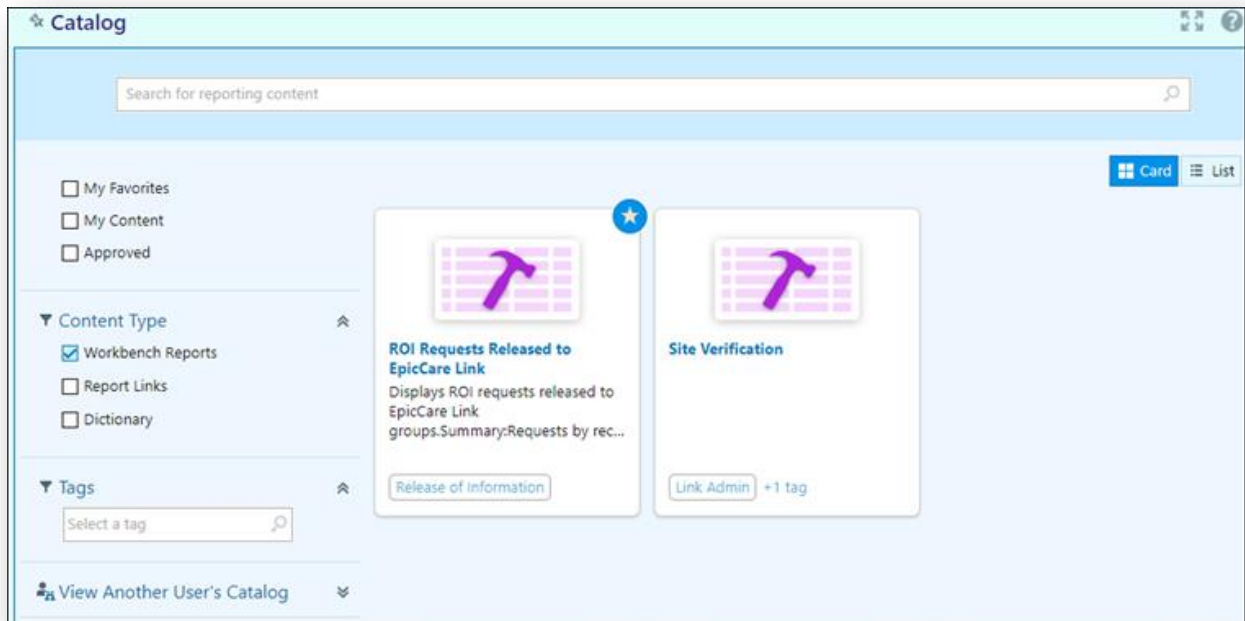
Managing Your Clinic as a Site Administrator

Change a user's password

1. Select the **Admin** tab and click **My Groups**.

2. Select the user whose password you need to change and click 👥 **Change Password**.

3. In the **Your password** field, enter your password.

4. In the **New password** and **Re-enter new** fields, enter the new password for the user.

5. Click ✔ **Accept**. The next time the user signs in using this password, she will be prompted to select a new password of her choice.

Verify users

You might receive a Site Verification message from your Epic organization asking you to verify that all users working at your site are current and active. These users might include providers who don't log in to the web application but are listed because they need to schedulable. From the message, you can click **Verify Now** and you are brought to the Site Verification activity. From the Site Verification activity, you can verify that all the users and providers working at your site are current, and you can deactivate users as needed to prevent unauthorized access by users whose accounts are outdated.

1. In the Active? column, select No for all the users whose accounts you want to deactivate. You can enter a comment in the **Comments** field that appears.

2. Select the **Acknowledgement** check box to acknowledge that you have reviewed and confirmed the list of users.

3. Click ✔ **Verify** to verify the list of users and close the screen.

> ℹ️ When the Login ID column says (No Access) and the Provider? column says Yes, this indicates a provider who doesn't log in to the web application but might be listed because they need to be schedulable.

Deactivate a user

1. Select the **Admin** tab and click **My Groups**.

2. Select and deactivate the user.

3. Enter a comment indicating why you're deactivating the user and click **Deactivate**.

Request a new user in EpicCare Link

1. Select the **Admin** tab and click **Account Requests**.

2. Click ➕ **Request New Account**.

3. Choose the type of account you want to create. For example, to create an account for a new physician at your site, click **Request access for a new provider**.

4. Enter the user's demographic information.

5. In the **User group** field, select the user group to which the user should belong.

6. Enter a comment about your request, if necessary, and click ✔**Submit Request**.

7. After your request has been processed, the new user will receive a login instructions letter.

> ℹ️ You can see the status of user requests that have been submitted in the Status column.

Update facility contact information

1. Select the **Admin** tab and click **My Facilities**.

2. Click the name of a facility to update its contact information, including the phone number, fax number, and address.

3. After you've finished editing contact information, click ✔ **Accept.**

> ⓘ   If an active address isn't on file, you can search for a matching address by entering an address and clicking ***Find Address***. Alternatively, click ***Manual Entry*** to enter all of the address information yourself.

An *Epic* Implementation in Partnership with Central East Ontario Hospitals
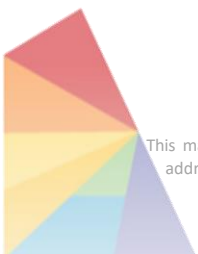
Updating Program Settings

You can use the EpicCare Link settings options to perform a variety of account maintenance tasks, including changing your password and setting the page that appears when you first log in. In addition, you can choose to receive email notifications at an external email address when you are granted access to a patient. You can set your preferences for these notifications, as well as specify the email address at which you'd like to receive them.

> ℹ️ You can change settings for other tasks, like determining your default patient selection method. A description of each setting appears on the ***Settings*** page in EpicCare Link.

Change your password

1. Go to **Menu > Settings > Change Password**.

2. Enter your old password, then a new password, and then your new password again.

3. Click ✔ **Accept**.

Set up your email preferences

1. Go to **Menu > Settings > My Demographics**.

2. Enter your email address, title, degree, languages, and specialties, if applicable. The fields that appear depend on your user role.

3. Click **Receive e-mail notifications** if you want to receive notifications for unread In Basket messages at your specified email address.

4. In the **Days between e-mails** field, enter the number of days you want to wait between notification emails.

5. Click **Receive notifications for group events** if you want to receive email notifications about all patient events for the provider groups you belong to.

6. Click ✔ **Accept**.

Change your default login page

1. Go to **Menu > Settings > Set Default Page**.

2. Go to the page that you want to set as your default page.

3. Click **Set Default Page** to set the current page as your default page.

> ℹ️ To reset your default page to the system default, go to Set Default Page and click ***Click here to clear your default page and use the system settings instead***.
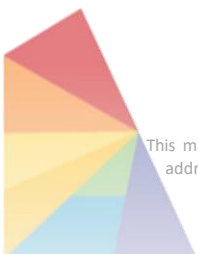

An *Epic* Implementation in Partnership with Central East Ontario Hospitals

Set up notifications

You can receive text or email notifications when you receive specific types of In Basket messages. For example, you might want to receive a text when you have a new In Basket message about a patient being discharged from the hospital.

1. Go to **Menu > Settings > Notification Preferences**.

7. Select the email and text check boxes depending on the type of notifications you want to receive for each type of message.

8. Enter the email address that you want to receive the email notifications.

9. Enter the phone number that you want to receive the text messages.

10. Click ✔ **Accept**.

Central East
Clinical Information System
AN EPIC TRANSFORMATION

An Epic Implementation in Partnership with Central East Ontario Hospitals