

# EPICCARE LINK NEW SITE REQUEST

## SUMMARY:

This process is for requesting a new EpicCare Link Site for UMC Health System. If you are already affiliated with an EpicCare Link site, please contact your site administrator for access.

## IMPACTED END-USERS:

Potential EpicCare Link Site Administrators

## REQUEST PROCESS:

### REQUEST THE EPICCARE LINK SITE

1. **Navigate** to [https://epiccarelink.umchealthsystem.com/EpicCareLink\\_PRD/common/account\\_request\\_main.asp](https://epiccarelink.umchealthsystem.com/EpicCareLink_PRD/common/account_request_main.asp)
2. Select **“Request a new site.”**

### Create User Accounts for Your Site



#### Request a new site

A site represents your workplace and must exist before you can add user accounts.



#### Add a user to an existing site

If someone at your workplace already has access, your workplace has a site.

3. Select **“Site”** unless you are part of a Post-Acute Care Site:

**Create User Accounts for Your Site**

**Request a new site**  
A site represents your workplace and must exist before you can add user accounts.

Choose a type of site to create:

**Site**  
A new site to represent your workplace

**Post-Acute Care Site**  
A new site to represent your workplace

**Add a user to an existing site**  
If someone at your workplace already has access, your workplace has a site.

4. **Complete** all required **Site Information**:

- Click the **“Add”** button under Reason for Requesting Access to include multiple options.
- The **Other** section should include a description of your organization and purpose in requesting access. This information will be reviewed when evaluating access.

**1. Site Information** 2. Users 3. Verification

**Site Information**

Site name: Example Site

Site type:

Phone: 555-555-5555 Fax:

Site NPI #:

**Address**

Address: 602 Indiana Ave

City: Lubbock

State: Texas ZIP: 79415

County: LUBBOCK

Country: United States of America

**Reason for Requesting Access**

Multiple Select

Referrals	<input type="text" value="Comment"/>	✗
Lab Orders	<input type="text" value="Comment"/>	✗
Imaging Orders	<input type="text" value="Comment"/>	✗

[Add](#)

**Other**

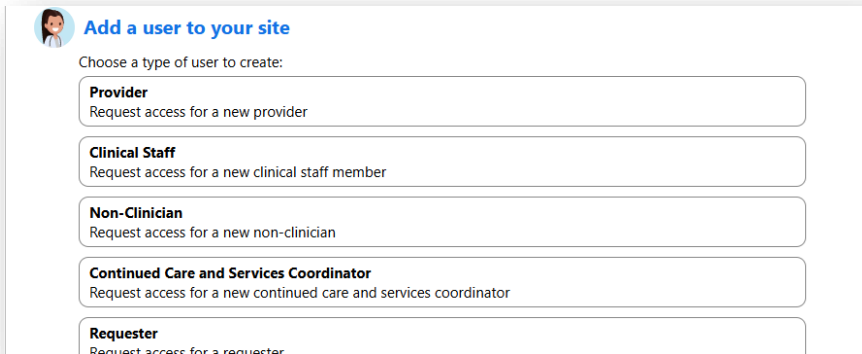
Provide a brief summary of your organization and reason for requesting access:

Comments: Example Site is a family medicine clinic that has been serving the Lubbock community since 1986. We'd like EpicCare Link access for placing referrals to specialists and placing orders for patients to have labs and imaging procedures performed.

5. Select **Next** to proceed to the following section of the request.

## REQUEST THE SITE ADMINISTRATOR

1. **Specify** the user type for the site administrator:
  - a. Use the User Type Guide (next page) to determine the appropriate user type.

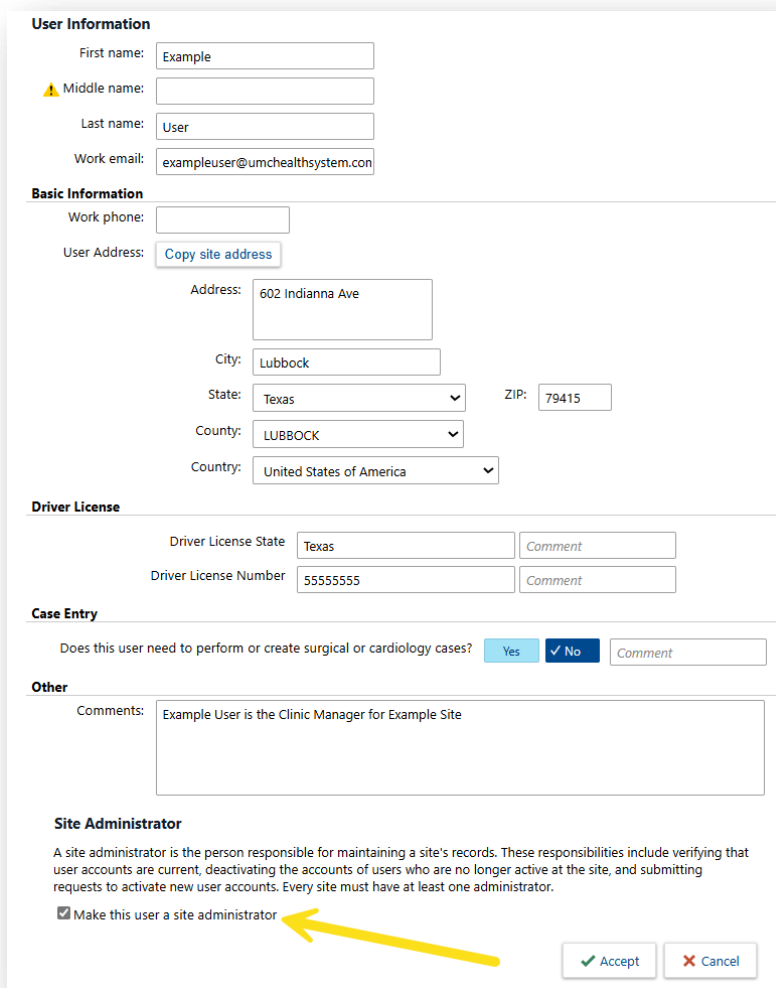


**Add a user to your site**

Choose a type of user to create:

- Provider**  
Request access for a new provider
- Clinical Staff**  
Request access for a new clinical staff member
- Non-Clinician**  
Request access for a new non-clinician
- Continued Care and Services Coordinator**  
Request access for a new continued care and services coordinator
- Requester**  
Request access for a requester

2. **Input information** required for the Site Administrator.
3. Select the box for **“Make this user a site administrator.”**



**User Information**

First name:

Middle name:

Last name:

Work email:

**Basic Information**

Work phone:

User Address: [Copy site address](#)

Address:

City:

State:

ZIP:

Country:

Country:

**Driver License**

Driver License State:

Driver License Number:

**Case Entry**

Does this user need to perform or create surgical or cardiology cases?

**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

4. Select **Accept** to proceed to the following section of the request.

### Provider

- Physicians and Advanced Practice Providers

### Clinical Staff

- RNs, MAs, CNAs, and other staff at clinical sites requiring access to clinical information for their role.
- If clinical staff perform **Case Scheduling requests**, select Yes under Case Entry during the request.

### Non-Clinician

- Office support staff, such as front desk registration staff.
- Limited access to patient information for referrals and In Basket management.

### Requestor

- Ability to request individual medical records electronically from HIM.
- Used for billing and administrative purposes.

### Continued Care and Services Coordinator

- Staff receiving post discharge service requests from UMC Health System.
- **Only Continued Care and Services Coordinator users can receive post discharge service requests.**
- Please select this user type for post discharge and transport workflows.

### Surgical Support Staff

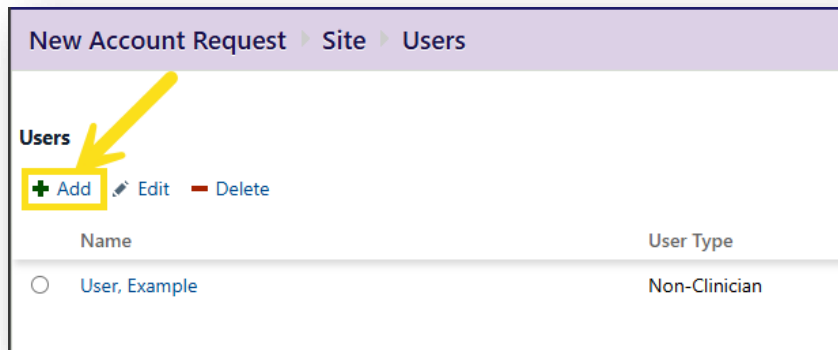
- Non-Clinician user type for office support staff at surgical clinics.
- Grants access to case scheduling requests.

### Specimen Collection Specific User Types

- Additional functions for specimen collection at designated UMC Lab submitter sites.
- Existing contract with UMC Lab is required to utilize these user types.

## REQUEST ALL OTHER USERS NEEDING EPICCARE LINK ACCESS

1. Click **“Add”** to configure an additional user using the same process as the Site Administrator.
  - **Repeat** for each staff member who needs access at your location.

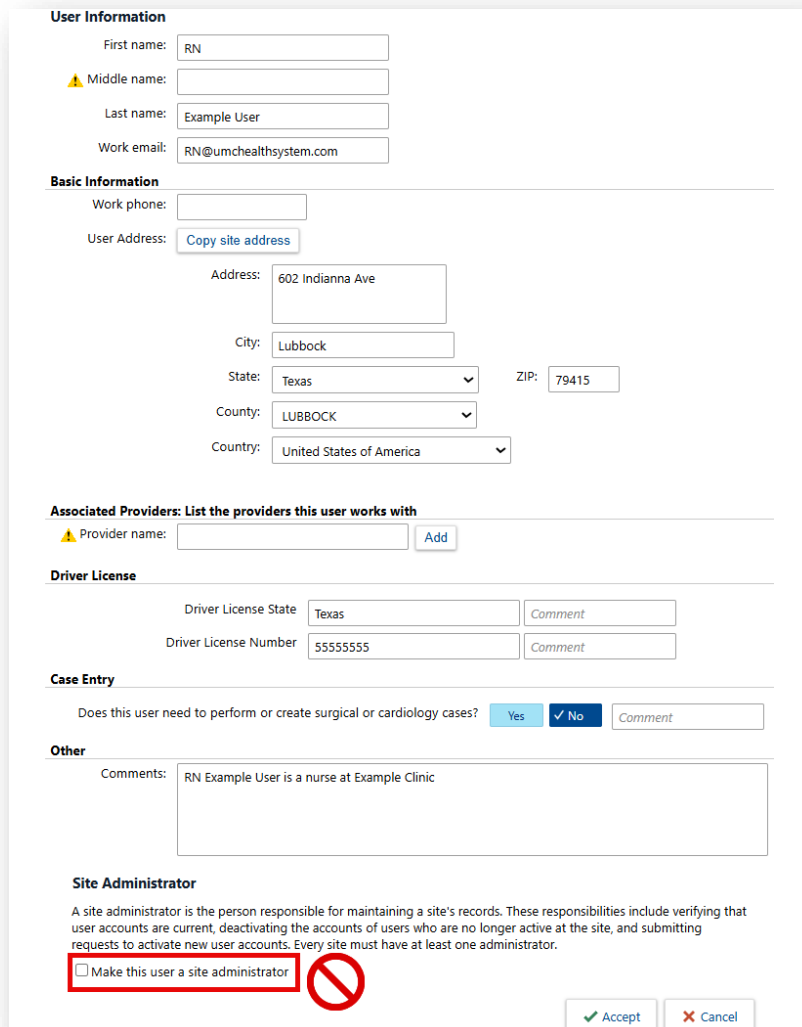


New Account Request > Site > Users

**Users**

Name	User Type
<input type="radio"/> User, Example	Non-Clinician

2. **Do Not Select** the box for “Make this user a site administrator” for normal staff.
  - Up to two site administrators are allowed per EpicCare Link site.



**User Information**

First name:

Middle name:

Last name:

Work email:

**Basic Information**

Work phone:

User Address:

Address:

City:

State:  ZIP:

County:

Country:

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

Provider name:

**Driver License**

Driver License State:

Driver License Number:

**Case Entry**

Does this user need to perform or create surgical or cardiology cases?

**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

**3. Providers must be requested through EpicCare Link to be associated with a site:**

- a. Use the **Provider** user type to request providers in EpicCare Link
  - Providers with existing internal Epic access will be linked to your site for authorizing orders but will not log into EpicCare Link.
  - Providers without existing Epic access will have an account created to log into EpicCare Link.
- b. **EpicCare Link sites will be unable to place orders without an authorizing provider.**



**Add a user to your site**

Choose a type of user to create:

**Provider**

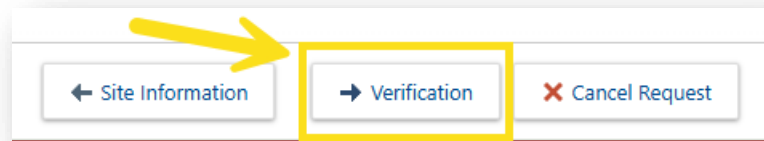
Request access for a new provider

**Clinical Staff**

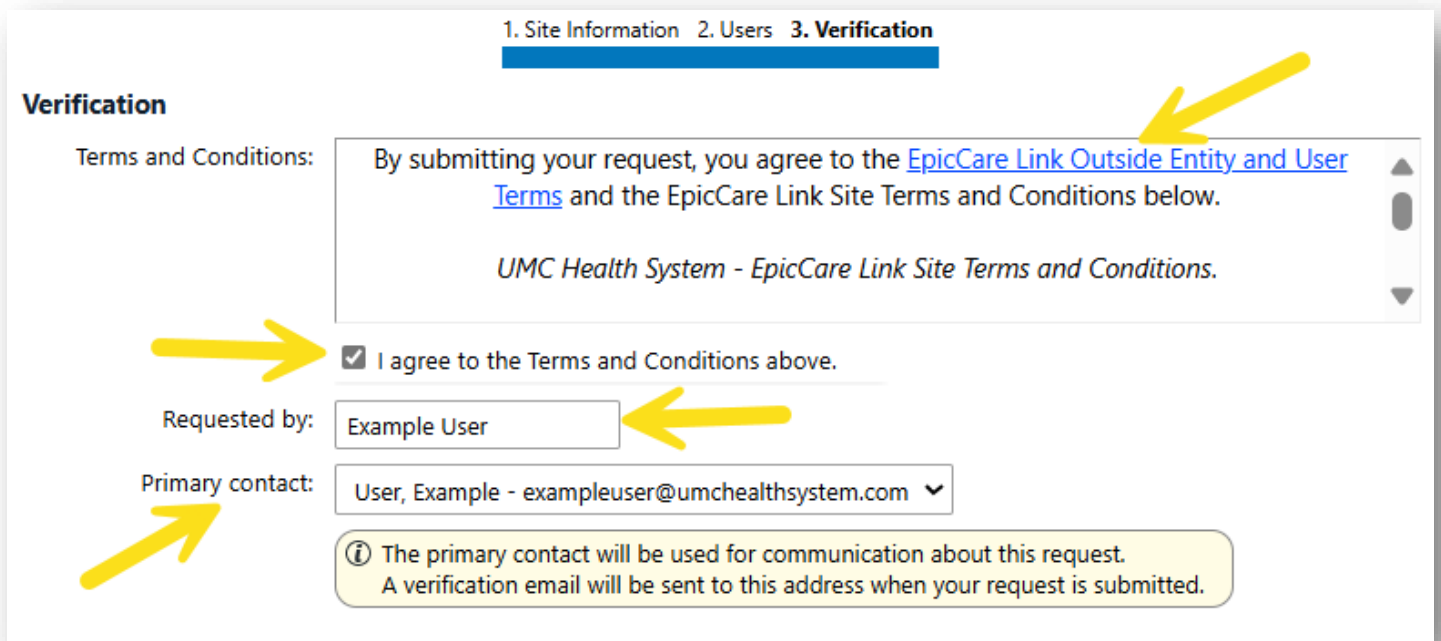
Request access for a new clinical staff member

## SUBMIT EPICCARE LINK REQUEST

1. **Proceed to Verification** once ALL staff have been added:



2. **Agree** to the EpicCare Link Terms and Conditions:
  - a. **Click** the link to review the EpicCare Link Outside Entity and User Terms.
  - b. **Review** the EpicCare Link Site Terms and Conditions by scrolling within the text box.
  - c. **Select** the box for **“I agree to the Terms and Conditions above.”**
  - d. **Input** your name in **“Requested by.”**
  - e. **Verify** your name is listed as the primary contact.



1. Site Information 2. Users 3. **Verification**

**Verification**

Terms and Conditions: By submitting your request, you agree to the [EpicCare Link Outside Entity and User Terms](#) and the EpicCare Link Site Terms and Conditions below.

*UMC Health System - EpicCare Link Site Terms and Conditions.*

I agree to the Terms and Conditions above.

Requested by:

Primary contact:

**i** 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.

3. **Verify** your email:
  - a. A message will be sent to your email for verification.
  - b. Click the link within the email to verify your email address.
  - c. Email verification is required to set your initial password.

## New Account Request ▶ Confirmation



### Verify Your Email Address

Click the link sent to **exampleuser@umhealthsystem.com** with the subject **Verify Email Address**.

#### Having trouble?

- If you cannot find the email, try checking your spam folder or incoming email filters.
- Contact the help desk by calling 806-775-9109 or by emailing [EpicCareLink@umhealthsystem.com](mailto:EpicCareLink@umhealthsystem.com).



EpicCareLink

To: **exampleuser@umhealthsystem.com**

Use the following link to validate your email for EpicCare Link:

[https://epiccarelink-np.et1442.epichosted.com/EpicCareLink\\_POC/?mode=emailVerify&token=2%24JIP3AZEQCwxT57gtMadW8w%3D%3D%24fWsZm%2Bt%2BCngdOCS7ehNB53nAR0kxQ%3D%3D%24SfwwFz96aSSvcWSYlgH2Hkgyll4vctBdVOU3VklPu88%3D](https://epiccarelink-np.et1442.epichosted.com/EpicCareLink_POC/?mode=emailVerify&token=2%24JIP3AZEQCwxT57gtMadW8w%3D%3D%24fWsZm%2Bt%2BCngdOCS7ehNB53nAR0kxQ%3D%3D%24SfwwFz96aSSvcWSYlgH2Hkgyll4vctBdVOU3VklPu88%3D)

If the link doesn't work, try copying the URL and pasting it in a new browser tab.

Having trouble? Contact the help desk by calling 806-775-9109 or by emailing [EpicCareLink@umhealthsystem.com](mailto:EpicCareLink@umhealthsystem.com).

4. Account request page will update that your email address has been verified.

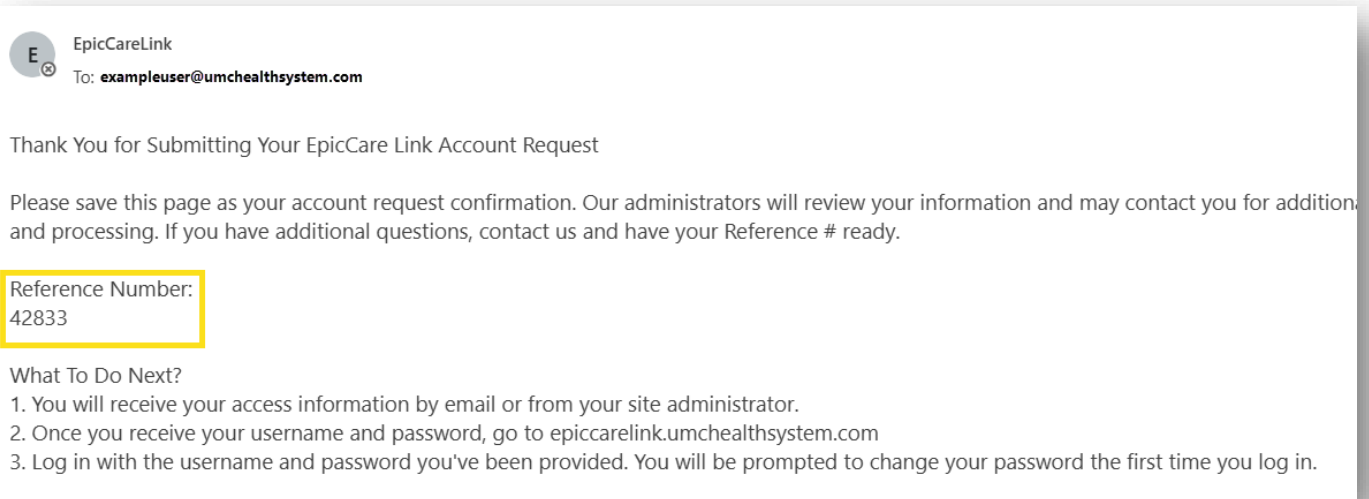


**Your email address is verified.**

**A confirmation email for your request has been sent.**

5. **Save** your email confirmation page:

- a. You will receive an account request confirmation email after verifying your email.
- b. Save this email as it contains the reference number for your request.
- c. **Your reference number is required to set your initial password after your account is created**



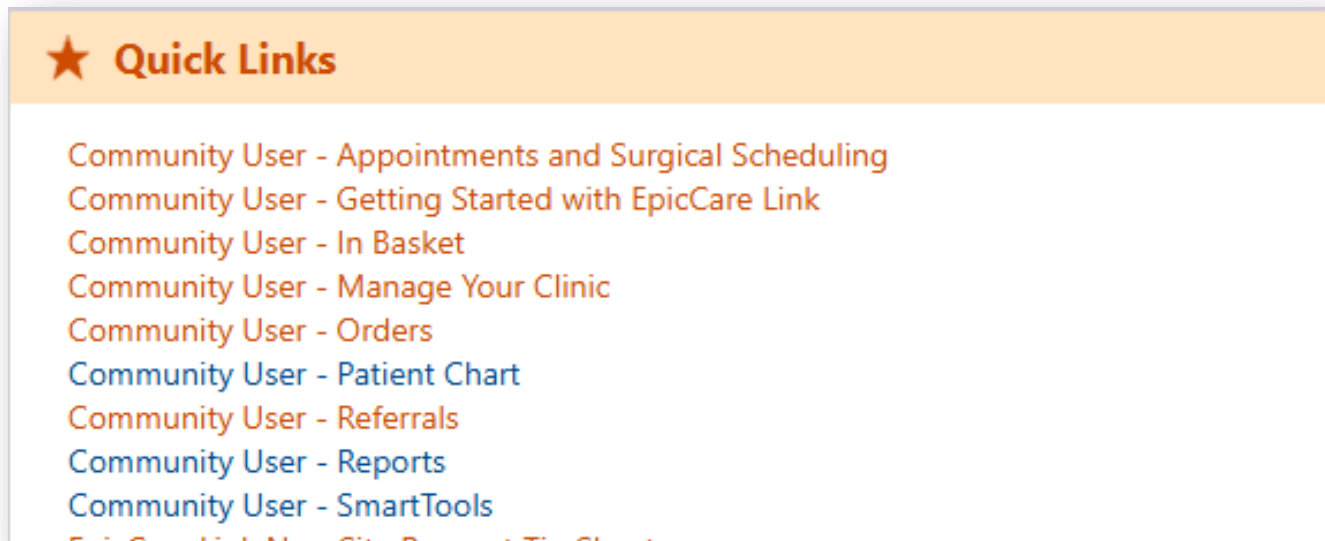
## NEXT STEPS

1. UMC Health System will review your EpicCare Link account request. We will contact the site administrator if additional information is required to complete your request.
2. We aim to process all requests within two weeks of receipt. We appreciate your patience as we work through all EpicCare Link requests.
3. If you have questions, send us an email at [EpicCareLink@umchealthsystem.com](mailto:EpicCareLink@umchealthsystem.com) or call our IT Service Desk at 806-775-9109 for immediate assistance.

## COMMON QUESTIONS

### EpicCare Link Training

- Formal training is not required before accessing EpicCare Link.
- The Quick Links section on the homepage once logged into EpicCare link contains all training material for EpicCare Link.
- All EpicCare Link users should review the Quick Links section in EpicCare Link.



### Multiple Geographic Locations

- Locations with different physical addresses should be requested as separate EpicCare Link Sites.
- One site administrator can request all locations and will have central access to all locations under one login.
- One additional site administrator can be requested for each EpicCare Link site.
- Staff must be requested under each EpicCare Link site they service.

### **Questions?**

If you have questions, send us an email at **EpicCareLink@umchealthsystem.com** or call our IT Service Desk at **806-775-9109** for immediate assistance.