Our provider portal supports you in providing the highest quality care for your patients

For more information: ukhealthcare.uky.edu/physicianportal
For any technical issues, call the EpicCare Link Service Desk at 859-323-2030.
# EPICCare Link Quick Start Guide

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GETTING STARTED

EpicCare Link is a tool that provides real-time web access to patient information, so you can retrieve patients’ clinical data and communicate with UK HealthCare to provide high-quality patient care. You can also use EpicCare Link to quickly refer patients to our organization.

Through this instance of EpicCare Link, you are ONLY accessing UK HealthCare and not other affiliates.

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.

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.
• Firefox version 45 or later.

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. It is also recommended that you access EpicCare Link from either a laptop or desktop for best results.

How to activate your account

For new users, UK HealthCare will email your login credentials to the email address listed on your application. Please follow the steps below to activate your account for the first time.

1. Please visit our Account Manager at ukam.uky.edu and select New Employee Wizard.
2. Enter your UK ID # and Temporary Passcode (your passcode is case sensitive) provided in the email you received.
   If you do not have a temporary passcode or experience any issues during the setup process, please call the EpicCare Link Service Desk at 859-323-2030. When calling, please provide your practice name and have your LinkBlue/ECL user ID readily available.
3. Click on the Next button.
4. You will then set up your two-factor authentication. EpicCare Link requires at least one two-factor device to be enrolled. Click on Add Device. You will be prompted with three options.
   a. I have a smartphone or tablet and can download the free Duo Mobile app (recommended option).
      i. Download and install the Duo Mobile app (available on Android or iPhone).
      ii. Using the Duo Mobile app, scan the QR code from your screen to link your device to your account. A green checkmark appears when the scan is complete.
   b. Your device will be added to the Registered Devices list.

Each organization configures Epic differently, so what you see in this guide might differ from what you see in another system.

If you had access to the UK Provider Portal 2.0 previously, your user ID and password will remain the same. You do NOT need to complete the following steps for account activation.
b. I have a phone that supports SMS/TXT Messages.

c. I have a Duo Token. (This option will not apply for most users).

!!! Skipping the setup of two-factor authentication will result in being unable to access EpicCare Link. !!!

5. Once you have set up your smartphone, tablet or non-smart phone, click Next.

6. Enter a new password twice. It will give you a list of requirements for your password. Your new password cannot have more than two identical characters in a row and the password cannot contain your first name, middle name, last name or username. Once you have entered your new password twice, click Save Password.

7. Under the Account Recovery and Notifications section, set up your cell phone and external email address, so you will have additional ways to get into your account if you forget your password in the future.

8. Once the system prompts you that your password has been successfully changed, you are ready to log in to EpicCare Link with your LinkBlue/ECL user ID and password.

How to log in

Users will need to activate their LinkBlue/ECL account before beginning these steps.

1. Open your web browser and go to ukhealthcare.uky.edu/providerportal.

2. Click on the button to launch EpicCare Link.

3. Enter your LinkBlue/ECL user ID and password. DO NOT enter your email address as shown in the example. Please note that passwords expire every 90 days and can be updated through the Account Manager at ukam.uky.edu.

4. Click Sign In.

5. Complete one of the following three options, based on your two-factor authentication method.

a. Duo Mobile app (recommended option). Select one of the following two methods.

   i. Select Send Me a Push. You should then get a notification from Duo on your smartphone. Click to open Duo. You will then be prompted to either Approve or Deny the log-in attempt. Select Approve.
ii. Select **Enter a Passcode**. Open your Duo app on your smartphone and click the University of Kentucky drop-down. Your passcode will be displayed on the screen. Enter your passcode in the Passcode field and click **Log In**.

![Duo app interface](image)

b. **SMS/TXT Message.** Select **Enter a Passcode**. Select **Text me new codes**. You will then receive a text with a passcode to your mobile device. Enter your passcode in the field and press **Log In**.

c. **Duo Token** (not applicable to most users). Select **Enter a Passcode**. Press the green button on the token to display the passcode. Enter the passcode from the token and click **Log In**.

Selecting **Remember me for 30 days** will bypass two-factor authentication for 30 days unless you use a different browser or clear cache.

**Expired or forgotten password**

Passwords expire automatically every 90 days without notification. If you have previously activated your account and are unable to log in, your password may be expired.

If you know your previous password, please complete the following steps:

1. Visit the **Account Manager** at [ukam.uky.edu](http://ukam.uky.edu) and select **Returning Users**.
2. Enter your **LinkBlue/ECL user ID** and your **current password**.
3. Click **Login**.
4. If you have previously set up two-factor authentication, you will be asked to confirm your identity by either entering a code that will be texted to your phone or by approving a push notification to your phone.
5. Under Password Details, click **Change Password**.
6. Enter your **Current Password**, enter your **New Password** and confirm your **New Password**.
7. Click **Change**.

If you have forgotten your previous password, please complete the following steps:

If you have not previously set up a two-factor authentication, please call the EpicCare Link Service Desk at 859-323-2030.

1. Visit the account manager at [ukam.uky.edu](http://ukam.uky.edu) and select **Forgot Password**.
2. Enter your **LinkBlue/ECL user ID** and click **I'm not a robot**. You may be required to select images.
3. Click **Next**.
4. Choose your **Password Reset Method** (cell phone, email or Duo Two-Factor Challenge). If none of these options are available, please call the EpicCare Link Service Desk at **859-323-2030**. When calling, please provide your practice name and have your LinkBlue/ECL user ID readily available.
5. Follow the menu prompts.
6. Under Password Details, click **Change Password**.
7. Enter your **New Password** and confirm your **New Password**.
8. Click **Change**.

**Help and contact information**

For help using an activity in EpicCare Link, click 📞.

- If you have attempted to activate your account and update your password, but you are still unable to login or receive an error message that you are not enrolled, please call the **EpicCare Link Service Desk** at 859-323-2030.
- For all other problems, requests or questions, send an **In Basket** message to the EpicCare Link team by choosing **New Msg>Customer Service>Report a Problem**.

**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:** Located across the top, use these tabs to open different activities in EpicCare Link. Each tab contains one or more related activities within. When you click a tab, the default activity for that tab opens.

- **Home** – Clicking this button always returns you to the home screen where you can access shortcuts to high-use activities, such as selecting a patient, opening chart review, placing an order, accessing unread messages, finding quick links to training materials and reading the latest news at UK.
- **In Basket** – Epic’s message-based task management system, streamlines communication and coordinates action.
- **Patient List** – Click here to view a list of your patients and currently admitted patients. These are patients who you have referred to UK HealthCare and/or you are a member of their care team.
- **Referral Search** – Click here to view a list of referrals submitted through EpicCare Link.
- **Schedules** – View upcoming appointments and video visits.
- **Reporting** – View links to the available Epic reports.
- **Patient** – Click here to view activities within the patient’s chart.

**B) Activity Menu:** Use this menu to open the various activities from within the selected navigation tab. For example, the **Patient** navigation tab contains the **Chart Review** and **Medication** activities among others.

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.

**C) Action Options:** Use the **Menu** button, located on the top right of the screen, to view available activities. Use the **Log Out** button to end your session.
ACCESSING THE PATIENT CHART

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

1. From the Navigations tabs, click Patient. You land on the My Patients tab.

2. Click the Recent tab to open a recently viewed patient.

3. Click the patient’s name to open their chart.

When you have access to many patients, your patient list may be more than one page. Use the search field at the top of the page to search for patients by their name or MRN. When searching by name, use a partial name search. For example, you can type ‘jon and’ to search for Jonathon Anderson. Once you find the patient, click Select.

4. The patient’s chart includes Clinical Review activities such as:
   • Snapshot – This provides clinicians with a quick overview of a patient’s chart. It also acts as a hub from which clinicians can open other activities, such as Allergies, Problem List, Medications or Immunizations.
   • Chart Review – All the information we have on a patient is viewable from here, including notes, labs, imaging and referrals. The Media tab contains all scanned documents.
   • Care Everywhere – This activity facilitates the secure exchange of patient records from outside organizations.
   • Results Review – View lab, imaging and cardiology results. See trends over time.
   • Flowsheets – View labs, vitals and more in table view. You can view most numerical values in graph view as well.
   • Allergies – View allergies, as well as adverse reactions and drug intolerances.
   • Problem List – This is maintained by physicians to track the progress and treatment of long-term conditions from onset to present day. Typically maintained by the patient’s primary care physician, but it is also updated by each member of the patient’s care team.
   • Current Medications, Patient Goals, Histories, and Growth Charts are also available.

5. To see more Clinical Review options, click at the end of the activity menu.

Print these pages by clicking or save as a PDF by changing the print destination.

6. Click the X near the patient’s name in the Navigation to close the chart.
7. To view a list of currently admitted patients, click the Patient List navigation tab and click EpicCare Link Admitted Patients. A list of patients displays for whom you have at least one of the following relationships: primary care physician, attending, admitting or treatment team member on the admission.

If a provider is missing from the Filter by PCP field, they may not have completed an ECL application. If they have completed an application more than two weeks ago, please Report a Problem by completing a Customer Service Request Message in your In Basket.

What if I cannot find a patient?

If you do not find a patient using the methods above, the patient may not be connected to your practice or the patient might not have a record in the system.

Use the Search All Patients section of the Patient activity when you need to access a patient’s chart for the first time. After accessing the patient’s chart, the patient will remain on your list for 10 days. To determine when you access to a patient’s chart ends, see the date under <Access Ends> on the storyboard, the panel on the left side of the screen.

1. If your initial search returns no results, click Search All Patients from the Search Results window.
2. Complete all the required fields (first and last name and DOB), and then click Search.

   = required field. The system will NOT let you move on.

   = recommended field. The system will allow you to move on.

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

The naming convention for newborns is: <Mother’s last name>, <baby’s gender> <Mother’s first name>. For example: Smith, Girl Ann.

To add a provider to a patient’s care team, go to In Basket>New Message> Customer Service>Report a Problem. For more information on submitting problems, requests or questions, refer to page 20.
Creating a new patient chart

If you need to make a referral or place an order and the patient’s record does not exist, you can create a new one in EpicCare Link by clicking **Create a New Chart** in the **Patient Search** activity.

⚠️ A new chart should not be created until you have searched My Patients and All Patients thoroughly. Creating an unnecessary new patient chart may result in duplicate records.

A reason for creating a new chart is required. Select referring physician if the patient’s record does not exist and you need to submit a referral or an order.

⚠️ = required field. The system will NOT let you move on.
⚠️⚠️ = recommended field. The system will allow you to move on.

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⚠️⚠️ = recommended field. The system will allow you to move on.
REVIEWING THE PATIENT CHART

Review the patient’s chart before a visit

1. Open the patient’s chart, click Chart Review and select a tab to review. All available patient data is viewable from here.

2. From the Encounters tab, click the date link in any encounter row to display the detailed encounter view. Click Back at the bottom right of the page to return to the previous page.

3. To view or print details on several dates at once, select the check boxes in those rows and then click Start Review on the upper left.

4. To print or save a PDF of a document(s) from the patient’s chart, select the printer icon from the upper right corner.

The following are included in the Chart Review activity:

- **Encounters** – Clinical contact with a patient. For example, office visits, admissions and triage calls are encounters. If more than one evaluation or procedure takes place at that visit, it is still usually considered one encounter. In billing applications, charges or other transactions can be associated with encounters.

- **Notes, Labs** – Clinic notes and lab results from the patient’s encounters.

- **Imaging** – Imaging orders, results reports and actual images from the patient’s encounters.

- **Procedures** – Orders and notes from procedures performed.

- **Meds** – Includes refill and dosing information.

- **Media** – External documents scanned in and added to the patient’s chart. It can include test results, consent forms, images, etc. Cath lab reports can be found under the media tab.

- **Letters** – Letters generated for the patient or sent to the patient.

- **Referrals** – Referral orders with a detailed report that includes authorization/certification information when relevant.

- **Episodes** – Collections of encounters or admissions with a common purpose. For example, an episode might link all prenatal visits for a pregnancy, a series of physical therapy appointments for an injury, or the consultation, pre-operative care, surgery and postoperative care associated with a transplant.

- **Other Orders** – Patient encounter information that does not fall under the other categories.

To view all available information in your patient’s chart, ensure Default Filter is unselected.

Hyperlinks to additional information are highlighted in blue.
Information in a patient's chart typically dates back to 1/1/2018 but varies by the type of document. If you cannot locate an item prior to this date, please contact Health Information Management (Medical Records) at one of the following telephone numbers:

- UK Albert B. Chandler Hospital: 859-322-5117
- UK Good Samaritan Hospital: 859-226-7033
- Kentucky Clinic: 859-323-5561
- Gill Heart & Vascular Institute Cath Lab: 859-323-6035
- Shriners Hospitals for Children Medical Center: 859-268-5648

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 only see 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 choose the appropriate filter.
3. Click Apply to make the results of your search appear.

To remove the search criteria and begin a new search, click Clear All Filters.

Find information quickly in the patient’s chart

For patients with a large amount of data, you can quickly find the information you need using the Search Chart field in the storyboard, the panel on the left side of screen. For example, type “cholesterol” to see a list of relevant matches in the patient’s chart, such as lipid panel results and progress notes that mention cholesterol.

The Search Chart feature is the easiest way to find specific information in the patient’s chart.

View Care Everywhere information

Care Everywhere is an application that provides access, at the point of care, to the patient’s medical records from other organizations. Patient information brought in through Care Everywhere has the icon next to it: Hover over the icon to see the organization from where the information was retrieved.
View a patient’s trending lab results

1. From a patient’s chart, click Results Review. The Date Range Wizard displays. The default may be set to <New results since time mark last set> which may hide historical data.

2. Select the data range for the results data you want to see, such as <All data>, and click Accept.

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.

5. To view reports or additional information, click either the paper or paper clip icon from within the table.

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 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 History or View Details.

View a patient’s current medications
Select the Patient tab and click Medications.

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.

For a high-level summary of the current patient's chart, select SnapShot from the Clinical Review menu. Refer to SnapShot to see a patient’s Immunization History.

View a patient’s care team
Can you change to: To determine if a PCP is on a patient’s care team, select the Patient tab and click Care Teams from the menu.

To add a provider to a patient’s care team, go to In Basket>New Message> Customer Service>Report a Problem. Be sure to include the patient’s name, DOB and the referring provider’s information.

View a patient’s demographics
Select the Patient tab and click Demographics from the Patient Profile menu to see a report with demographic information like the patient’s address, primary care provider, emergency contacts and more.

View a patient’s billing information
To view information about the patient’s eligibility for health plans, coverages, service areas, networks and more, select the Patient tab and click Coverage & Benefits from the Patient Profile menu.

You can also see details about a particular coverage on the Benefits Summary or Coverage Detail Report page to:

• Determine whether a particular service is covered in or out of network.
• Determine whether a coverage is active.
• Determine whether benefits for a particular service are metered and what the limits are for each level of benefits.
• Determine what the patient portion will be for a particular service.
• Review a complete summary of benefits.

UPLOADING FILES TO THE PATIENT CHART
You can attach a file to the patient’s chart, such as an electronic copy of exam notes, test results, consent form, images, etc. Once uploaded, these documents may be stored in the Media tab of Chart Review.
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 bottom left of the screen to open a window where you can drag and drop the file.
   a. 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.
   b. 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 you want to remove a file that you selected, click ✗ **Cancel**.
5. If the message for reviewer section appears, enter a message for the administrator who reviews files.
6. Click **Attach to Patient’s Chart**.

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**PLACING ORDERS**

You can place some orders, such as labs and imaging, directly from EpicCare Link. For more information on working with referrals, refer to [page 16](#).

### Place a new order

1. Locate your patient and select **Order Entry**.
2. Select an **authorizing provider** and click ✅ **Start New Order**.
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 panel 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 is a required (⚠️) or recommended (✔️) icon, enter information as necessary. Click an order’s name or the edit pencil to edit details like quantity or associated diagnoses.
   - For a procedure order, you can attach a file, such as a scanned image, to the order.
   - To associate a diagnosis with a single order, either select the check box for a recent diagnosis in the **Dx Association** section or enter a new diagnosis in the **Add a new diagnosis** field and press **Enter**.

⚠️ **Expected date is not guaranteed and is dependent upon access.**

7. Accept and select a co-signer (only applicable to non-provider EpicCare Link users) and sign the order.
8. If there is decision support associated with any of the orders, select a follow-up action and click ✅ **Accept**.

⚠️ **Lab orders: Please call ahead to schedule an appointment with UK HealthCare’s outpatient lab. Due to COVID-19, we can no longer accept walk-ins. Please call the Patient Access Center for scheduling at 859-257-0105 or 866-940-4938.**

   **Imaging orders:** An authorization is required before scheduling a procedure. Once an authorization is obtained, please call UK HealthCare Radiology at 859-323-9729 (XRAY) to schedule.

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*If you already know the name of the order in EpicCare Link, you can search for it in the New procedure search field. Enter a partial word in a field instead of a whole word to reduce time. For example, entering “gluc” in the New procedure field in Order Entry shows you all of the procedures beginning with “gluc”. You can use this shortcut for any information that is stored in the database, such as an order, e-consult and another provider’s name.*
Physician/APP users: Sign in to EpicCare Link and navigate to In Basket to the Co-Sign Clinic Orders folder and sign off on any orders that were routed to you for co-signature. If the order does not belong to you, please decline and it will be removed from your In Basket.

A co-signature by a provider is REQUIRED for all lab and imaging orders.

**Associating diagnoses for multiple orders**

From the Order Entry activity, you will need to associate orders with a diagnosis before signing them. This can be accomplished several ways:

- Associate all the patient’s orders with all the patient’s diagnoses by clicking **Associate All** on the Diagnosis Association page.
- Manually associate orders and diagnoses by selecting the appropriate check boxes.
- Select a problem from the Quick Picks list, which includes the patient’s problems and recently used diagnoses, and click the left arrow (←) icon to add the problem as a diagnosis for the encounter.
- Remove a diagnosis from the Diagnoses list by selecting the diagnosis and clicking the **Delete the selected diagnosis** (−) icon.

**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, add any comments and click **Cancel Orders**.

**Placing an E-Consult order**

E-Consults allow EpicCare Link providers to communicate with specialists at UK HealthCare for advice regarding a patient’s care through In Basket messages. Common specialties used for E-Consults include infectious disease, obstetrics, plastic surgery and otolaryngology.

After the E-Consult order is signed by the EpicCare Link provider, it is then routed to the provider responsible for documenting on the E-Consult. Once the encounter is completed by the UK HealthCare provider, the external provider will receive a notification of the E-Consult via In Basket to view the documentation and recommendation provided by the UK HealthCare provider.
1. Select your patient and click **Order Entry**.
2. Select an authorizing provider and click **Accept**.
3. Type **E-Consult** in the **New Procedure** field to see a list of available types.
4. Click the appropriate type of E-Consult.
5. Fill out the requested information and click **Accept**.
6. Enter all required and recommended fields. Attach any applicable files, such as a scanned image, to the E-Consult.
7. To associate a diagnosis with a single order, either select the check box for a recent diagnosis in the **Dx Association** section or enter a new diagnosis in the **Add a new diagnosis** field and press **Enter**.
8. Accept and select a co-signer (only applicable to non-provider EpicCare Link users) and sign the order.

## 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. Locate your patient and click their name to open **Order Entry** activity for that patient.
3. Select an **Authorizing Provider** and click **Accept**.
4. Click **Preference List** to see a list of available orders.
5. Click **Referrals** and select the referral you want to submit.
6. Complete the referral information and attach all applicable medical records by selecting **add files**.
7. Click **Accept Orders**.
8. To edit the order before signing, click the referral hyperlink in **Order Entry**. Edit associated diagnoses, attach any relevant files and enter any comments. Click **Accept**.
9. Click **Sign Orders**.

**Expected date is not guaranteed and is dependent upon access. Referrals can continue to be submitted by calling UKMDs at 800-888-5533 and indicating that you would like to place a referral to a specific specialty.**

**Use completion matching to search the New procedure search field.**

### 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.

**You cannot edit a signed referral, but you can upload additional notes or attachments.**

3. For more information about a referral, click the referral ID link.
View a list of referrals for specific providers or locations

1. From the Navigation Activities, select the **Referral Search** tab.
2. Select **Outgoing** to see referrals placed by your organization to UK HealthCare.
3. In the **Referred By** section, select one or more providers or locations.
4. In the **Referral Status** and the **Scheduling Status** section, select each status that you want to include in your search results.
5. Enter dates in the **From** and **To** fields to limit your search by dates.
6. Click **Search**.

⚠️ The functionality for incoming referrals (referrals sent to community providers from UK HealthCare) is currently not available in EpicCare Link.

7. 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 **Schedules** tab allows you to view and sort upcoming and canceled appointments for your patients by date and time.

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, select your **Patient** and click **Upcoming Appointments**.
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 and monitor your patients. 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 panel. For example, you might see **Results** or **Referral Notifications** 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.

The **Home** tab also displays unread messages and helps you monitor events that occur in your patients’ care, such as inpatient admissions or discharges, outpatient visits, or new lab results. Hover over each type of event in the **Unread Messages** section on the Home tab to review recent events for your patients. This is a limited preview of what you have in your In Basket.

If necessary, you can view more information about events by clicking the name of the patient in the **Patient** column. This action opens the message in your In Basket activity, allowing you to view more detail and take more action on the message.
View a message

1. From your In Basket, select a folder for the type of message you want to review (i.e., Result Notifications).
2. Single-click a message event to see a preview in the pane below and read its contents.

Select ✓ Done once you have reviewed the message and completed any necessary action. Clicking refresh will remove the message from your In Basket. By selecting Done, the message may be removed from other users in your group, depending on how your event notifications are set up. For more information on event notifications, refer to page 22.

3. Click ◼ Select Patient to open the patient’s chart from an event message.

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 Messages on the top left above the notification folders.

Print or save multiple messages

If you are working with a paper system, you can print multiple In Basket messages to keep on file for certain messages.

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 messages or save as a PDF by changing the print destination to Save as PDF.
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 several 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 drop-down arrow next to New Msg, and select the type of message you want to send. Select Send Message for a generic staff message.

2. In the To field, type 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 the patient’s name or type the desired name to 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 on the bottom left.

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 on the bottom left or My Messages on the top left above the notification folders.
IN BASKET: CUSTOMER SERVICE REQUESTS

You can submit a Customer Service Request if you experience a problem or have a request or question about EpicCare Link. In addition, Customer Service Requests are utilized to schedule appointments and video visits with established patients.

Submitting problems, requests or questions

Problems, requests and questions can be addressed by submitting a New Customer Service Request through In Basket. This includes requesting a patient to be added or removed from a referring provider’s Patient List (care team), reporting suspected issues with providers or patients not being linked to your practice, and designating an existing user as a second site administrator.

1. Select the In Basket tab, click the drop-down arrow next to New Msg, and select Customer Service.
3. Enter a brief subject in the Summary field.
4. Select whether this is a problem, request or question.
5. Complete any other applicable fields.
6. Be as specific as possible in the required Details field. If you are requesting that a patient be added to or removed from a provider’s care team, please provide the patient’s name and DOB, as well as the name of the provider(s).
7. When you are finished, click Submit.

Requesting an appointment or video visit

You can request a UK HealthCare appointment or video visit for established patients through In Basket. Schedulers receive your request in their In Basket where they process the request and schedule the appointment. Once the appointment is successfully scheduled, the referring provider will receive an In Basket message in their Outpatient Notifications folder.

This feature should NOT be utilized for sending referrals for new patients. For more information on working with referrals, refer to page 16.
1. Select the **In Basket** tab, click the drop-down arrow next to **New Msg** and select **Customer Service**.

2. Under **Topic**, select **Schedule Request Message**.

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

4. Select appropriate **Priority** of High, Routine or Low.

5. Select the appropriate **Patient**.

6. Enter the patient’s **Phone number**.

7. Click to choose a **Visit Type**, such as office visit, consultation or video visit.

8. Enter a **Specialty**, such as pediatric cardiology.

9. Enter **Appointment/Scheduling** information, such as if the patient would like to see a specific provider or has an appointment preferences.

10. Enter any additional **Details**.

11. When you are finished, click **Submit**.

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### UPDATING USER SETTINGS

You can use the EpicCare Link **User Settings** to perform a variety of account maintenance tasks, such as setting the page that appears when you first log in. Additionally, you can choose to receive email notifications at an external email address. You can set your preferences for these notifications, as well as specify the email address at which you’d like to receive them, in User Settings.

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

You CANNOT change your password through User Settings in EpicCare Link. All passwords must be updated through Account Manager. For more information about updating expired or forgotten passwords, refer to page 5 →.
Set up your email preferences
1. Go to Menu > Settings > My Demographics.
2. Enter your Email Address.
3. In the Days Between Email Notifications field, enter the number of days you want to wait between notification emails.
4. Click Receive e-mail notifications if you want to receive notifications for unread In Basket messages at your specified email address.
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. Complete additional fields such as phone, address, specialties, languages and title, if applicable. The fields that appear depend on your user role.
7. Click ✓Accept.

At this time, we do not have the ability to send notifications via text message.

Set up your notification preferences
You can receive email notifications when you receive specific types of In Basket messages. For example, you might want to receive an email when you have a new In Basket message about a patient being discharged from the hospital.

1. Go to Menu > Settings > Notification Preferences.
2. Check mark Email box for the type of notifications you want to receive.
3. Click ✓Accept.

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 Settings. You can tailor which types of events you are notified of and for which patients. To be associated with an event you must have one of the following relationships with the patient: attending provider, admitting provider, referring provider, treatment team member, care team member or primary care provider.

1. Go to Menu > Settings > Event Settings.
2. Choose which types of events you will receive notifications for in the Event Filter section. Be sure to select the down arrow to view all notification options.
3. Choose which events you will 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.
   b. Only events associated with my group (recommended). For example, if a patient you have access to is admitted to the hospital, and the patient’s primary care provider is in your group, you receive a notification even if the primary care provider isn’t associated with the admission.
   c. Only events associated with me. This option is recommended for providers who only want notifications on their patients. It is not recommended for staff members. Staff members will not have patients associated with them.
   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, but you may miss notifications.

c. **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.

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**LOGGING OUT**

To maintain patient confidentiality, you should log out or secure your screen when you are done working or step away from the computer. You are automatically logged out after 20 minutes of inactivity within EpicCare Link. The next time you log in, you will be directed to the provider portal landing page.

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**MANAGING YOUR CLINIC**

Each organization must have one or two site administrator(s) for EpicCare Link. A **Site Administrator** should be a user who accesses EpicCare Link regularly and can verify users. **The following sections apply to Site Administrators only.**

**Verify users**

As the Site Administrator, you will receive a **Site Verification** message every six months asking you to verify that all users at your site are current and active.

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.
As the Site Administrator, you will need to verify your users within 30 days or the system will lock out all unverified users.

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.

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. Click the minus − icon in the row for a user to deactivate them.
3. Enter a comment indicating why you are deactivating the user and click ⏪ Deactivate.

If you are a Site Administrator, please deactivate within 48 hours any individual who no longer needs access to the portal or has left your organization.

Request a new user/site in EpicCare Link
As the Site Administrator, you can request a new user(s) or a new site 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 and all required 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 email. Please note that the processing time may vary during the launch of EpicCare Link.
User roles in EpicCare Link

There are nine user roles within EpicCare Link. Each user role has a set of identified features and permissions within the site. These roles include:

- Provider.
- Support staff.
- School nurse.
- Detention center clinician.
- Psych/social professional.
- Therapist.
- Biller.
- Research monitor.
- Emergency medical technician.

Update facility contact information

As the Site Administrator, you can update your facility’s 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 have finished editing contact information, click Accept.
Information contained in this EpicCare Link Quick Start guide is subject to change. For a current copy of the Quick Start Guide, visit Quick Links on the Home page within EpicCare Link or contact the Physician Liaison Program at 859-323-0736.