

# EPICCARE LINK QUICK START GUIDE

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



For more information: [ukhealthcare.uky.edu/physicianportal](https://ukhealthcare.uky.edu/physicianportal)

For any technical issues, call the EpicCare Link Service Desk at 859-323-2030.

# EPICCARE LINK QUICK START GUIDE

## TABLE OF CONTENTS

<b>GETTING STARTED .....</b>	<b>3</b>	<b>WORKING WITH REFERRALS .....</b>	<b>16</b>
Browser, system and connection requirements.....	3	Create a new referral .....	16
How to activate your account.....	3	View a list of referrals for a patient .....	16
How to log in .....	4	View a list of referrals for specific providers or locations ....	17
Expired or forgotten password.....	5	<b>VIEWING UPCOMING APPOINTMENTS .....</b>	<b>17</b>
Help and contact information.....	6	<b>IN BASKET: VIEWING MESSAGES .....</b>	<b>17</b>
Navigating in EpicCare Link.....	6	View a message .....	18
<b>ACCESSING THE PATIENT CHART .....</b>	<b>7</b>	Search for a message.....	18
Select your patient's chart from a list of current patients.....	7	Print or save multiple messages.....	18
What if I cannot find a patient? .....	8	<b>IN BASKET: SENDING MESSAGES .....</b>	<b>19</b>
Creating a new patient chart.....	9	Send an In Basket message.....	19
<b>REVIEWING THE PATIENT CHART .....</b>	<b>10</b>	Reply to or forward a message.....	19
Review the patient's chart before a visit .....	10	View messages you've sent .....	19
Use filters to narrow the list of information you see .....	11	<b>IN BASKET: CUSTOMER SERVICE REQUESTS .....</b>	<b>20</b>
Find information quickly in the patient's chart.....	11	Submitting problems, requests or questions.....	20
View Care Everywhere information .....	11	Requesting an appointment or video visit.....	20
View a patient's trending lab results .....	12	<b>UPDATING USER SETTINGS .....</b>	<b>21</b>
Customize the way results appear.....	12	Set up your email preferences.....	22
View a list of the patient's current medical problems.....	13	Set up your notification preferences .....	22
View a patient's current medications .....	13	<b>MONITORING YOUR PATIENTS .....</b>	<b>22</b>
View a patient's history .....	13	Target your event notifications .....	22
View a patient's care team.....	13	<b>LOGGING OUT .....</b>	<b>23</b>
View a patient's demographics .....	13	<b>MANAGING YOUR CLINIC .....</b>	<b>23</b>
View a patient's billing information.....	13	Verify users .....	23
<b>UPLOADING FILES TO THE PATIENT CHART .....</b>	<b>13</b>	Deactivate a user.....	24
<b>PLACING ORDERS .....</b>	<b>14</b>	Request a new user/site in EpicCare Link .....	24
Place a new order.....	14	User roles in EpicCare Link .....	25
Associating diagnoses for multiple orders .....	15	Update facility contact information.....	25
Cancel a signed order.....	15		
Placing an E-Consult order.....	15		


# 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.

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

## 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 Internet Explorer 11.
- 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.

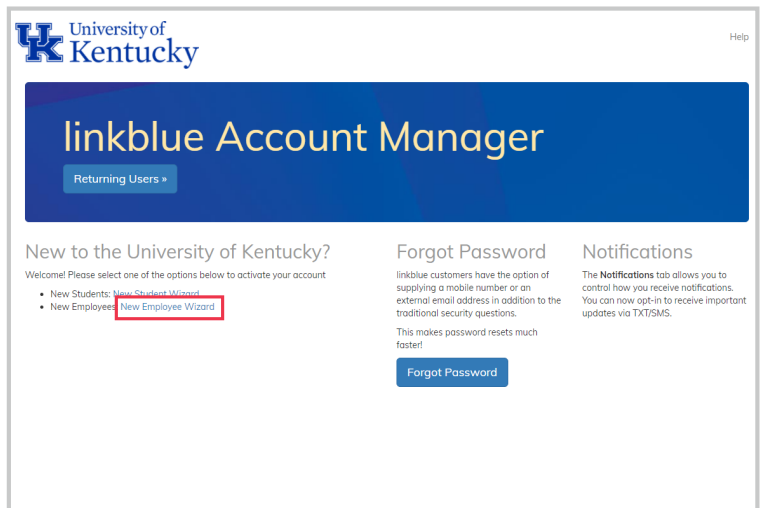
## How to activate your account

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](http://ukam.uky.edu) and select **New Employee Wizard**.

 **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.**

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 a 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.
    - iii. Your device will be added to the Registered Devices list.





- 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](http://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](http://ukam.uky.edu).
4. Click **Sign In**.



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



Settings

Send Me a Push

Enter a Passcode

☒ Remember me for 30 days

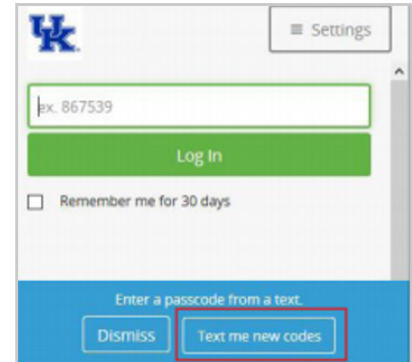
- a. **Duo Mobile app** (recommended option). Select one of the following two methods.
  - i. Select **Send Me a Push**. You should then get a notification from Duo on your smartphone. Click to open Duo. You will then be prompted to either Approve or Deny the log-in attempt. Select **Approve**.



- 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**.



- 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**.



**i** 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.

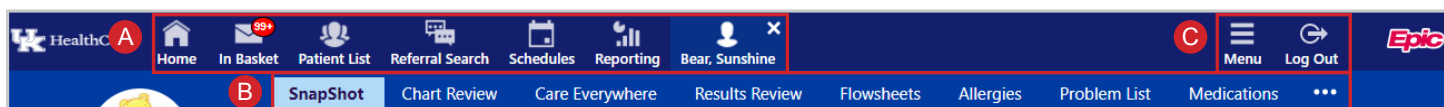
5. Follow the menu prompts.
6. Under Password Details, click **Change Password**.
7. Enter your **New Password** and confirm your **New Password**.
8. Click **Change**.

## 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.




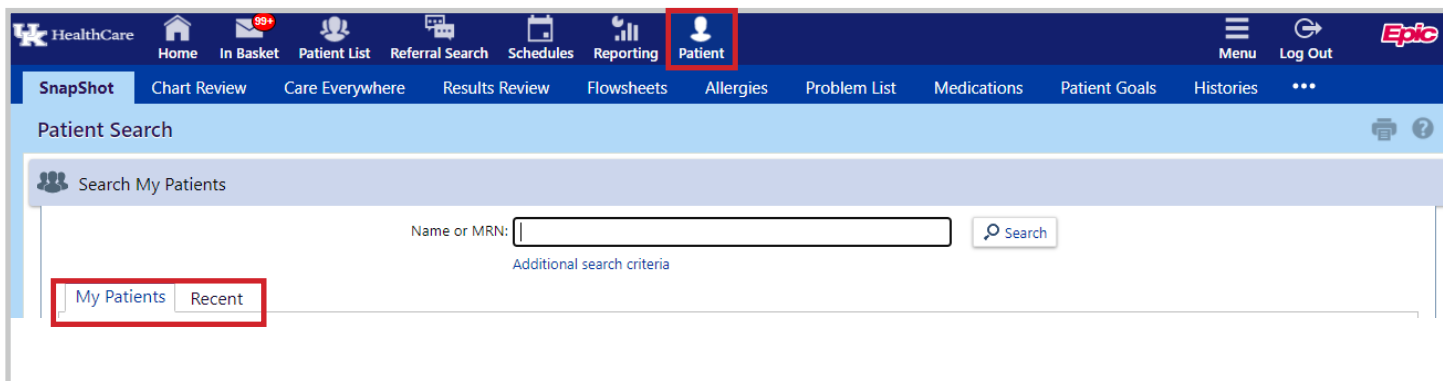
If there are more activities than can fit on the screen, hover over the ellipsis \*\*\* on the far right of the menu to see all the activities.

- 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.

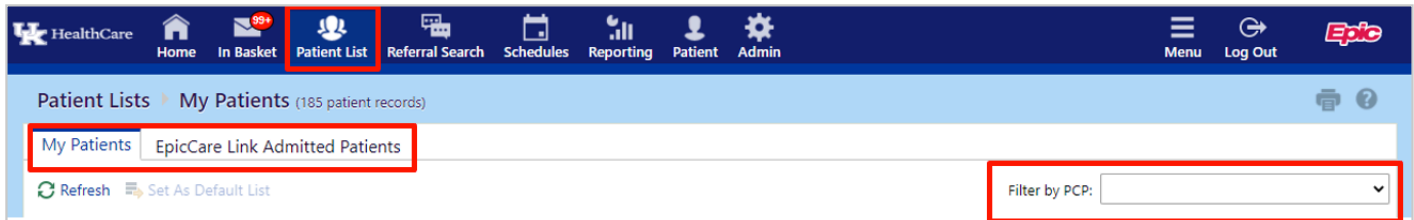
5. To see more Clinical Review options, click **...** at the end of the activity menu.

 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.



**i** 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.

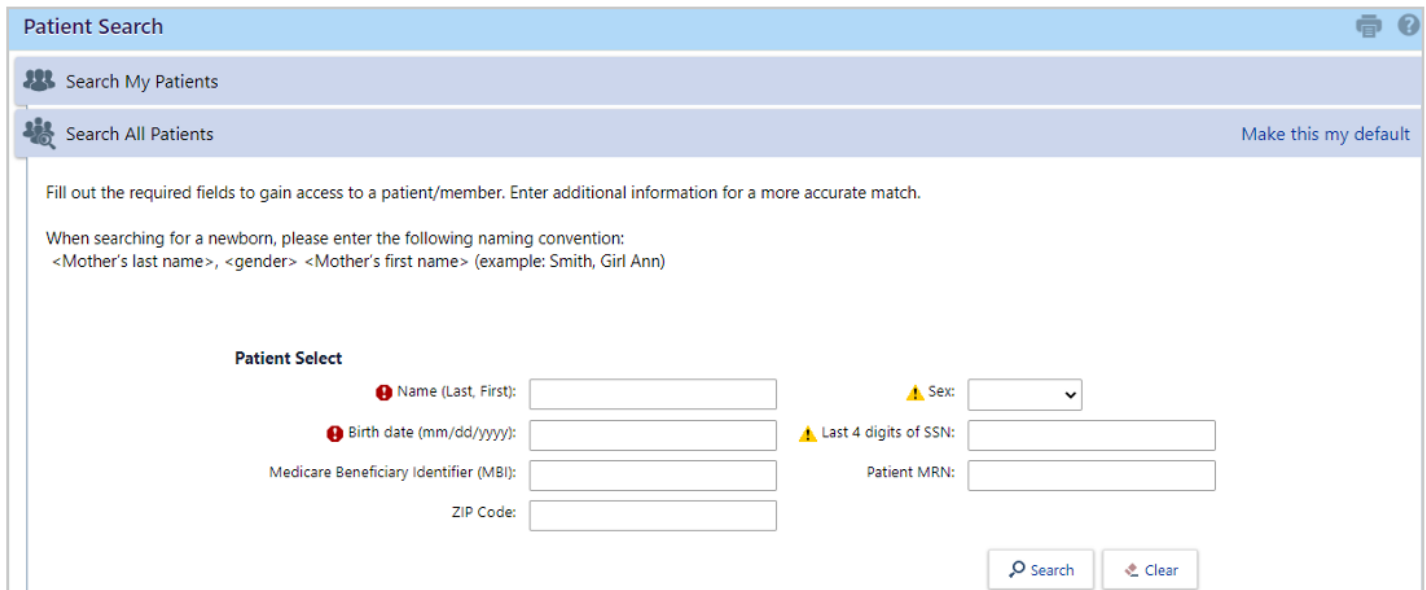
1. If your initial search returns no results, click **Search All Patients** from the Search Results window.

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**.




**i** 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.


 Create a New Chart Make this my default


Fill out the required fields to create a new patient/member chart. Enter the full name as Last, First (example: Doe, John).


To avoid potentially duplicate patient charts, please use the search function before creating a patient.

**Patient Create**


 Name (Last, First):

 SSN (If unknown, enter all 6's):

 Address:

 State:

Country:


 Home Phone:


Email Address:

Work Phone:


Contact Relationship:


Contact Is Legal Guardian:

 Reason:

 Sex:

Birth date (mm/dd/yyyy):

 City:

 ZIP Code:


Mobile Phone:


Employer:

Contact Name:

Contact Mobile Phone:

Comment:


 Create

 Clear

# REVIEWING THE PATIENT CHART




## Review the patient's chart before a visit

The screenshot shows the 'Chart Review' interface for a patient named Sunshine Bear. The interface includes a top navigation bar with various tabs like Home, In Basket, Patient List, Referral Search, Schedules, Reporting, Bear, Sunshine, and Admin. Below this is a secondary navigation bar with tabs for SnapShot, Chart Review, Care Everywhere, Results Review, Flowsheets, Problem List, Medications, and Patient Goals. The 'Chart Review' tab is active, showing a sub-header 'Chart Review - Loaded: 30'. Below the sub-header is a row of tabs: Encounters, Notes, Labs, Imaging, ECG, Procedures, Meds, LDAs, Media, Letters, Episodes, Referrals, and Other Orders. The 'Encounters' tab is selected. Below the tabs is a 'Start Review' button (callout 3) and a 'Default filter' checkbox (callout 4). Below the 'Start Review' button is a 'Recent Visits' table with columns: When, Type, With, Description, and CSN. The table shows a visit on 07/15/2021 (callout 2) for 'Community Orders' with a description of 'Community Us - Epiccare Link, P' and a CSN of 1001001045835. A printer icon (callout 4) is located in the top right corner.

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

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

 Hyperlinks to additional information are highlighted in blue.

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.





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.



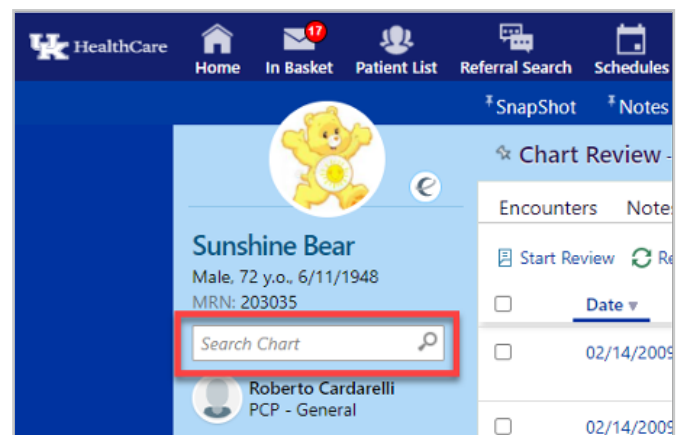
To remove the search criteria and begin a new search, click  **Clear All Filters**.

## 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.

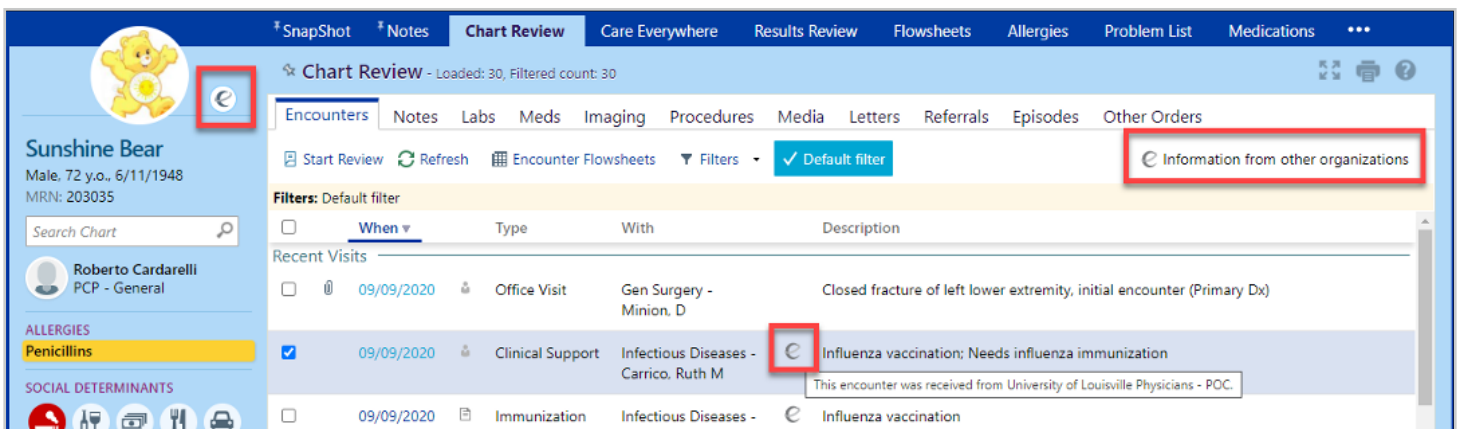


The **Search Chart** feature is the easiest way to find specific information in the patient's chart.



## 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**.

The screenshot shows the 'Results Review Date Range Wizard' dialog box. It has a title bar with 'SnapShot', 'Chart Review', 'Results Review', 'Flowsheets', 'Allergies', 'Problem List', 'Medications', and 'Patient Goals'. The main content area says 'Please select a date option from the list below. To return to this page from the results display, click the 'Use Date Range Wizard' button next to the date field.' There are two columns of radio button options: 'New results since time mark last set' (New result view), 'Data since last encounter' (Extended view), 'All data' (Extended view, selected), 'Most recent results, 12 months' (Latest data view), and 'Results for current pregnancy episode' (Extended view). There are also checkboxes for 'Start with date range filter enabled' and 'Show this page before displaying Results Review'. At the bottom are 'Accept' and 'Cancel' buttons.

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.

The screenshot shows the 'Results Review' interface. It has a title bar with 'SnapShot', 'Chart Review', 'Care Everywhere', 'Results Review', 'Flowsheets', 'Problem List', and 'Medications'. The main content area has a toolbar with 'Hide Tree', 'Show Ref Rng', 'Load All', 'Load More', 'Time Mark', 'Refresh', 'Legend', and 'Options'. Below the toolbar is a 'View' dropdown set to 'Extended View', a 'Hide data prior to' date field set to '12/1/2020', and a 'Use Date Range Wizard' button. On the left is a 'Select a component:' dropdown with 'Expand' and 'Collapse' buttons. The main table has 5 columns with dates and times: 1 (4/5/2021 11:40), 2 (1/27/2021 10:24), 3 (9/21/2020 10:49), 4 (9/16/2020 15:45), and 5 (7/21/2020 16:26). The table rows are 'ULTRASOUND', 'US ABDOMEN LIMITED...', 'ECHO', and 'ECHO, TRANSTHORACI...'. There are paper and paper clip icons in the table cells.



**i** 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. Results that are new to you will display in bold.

## 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

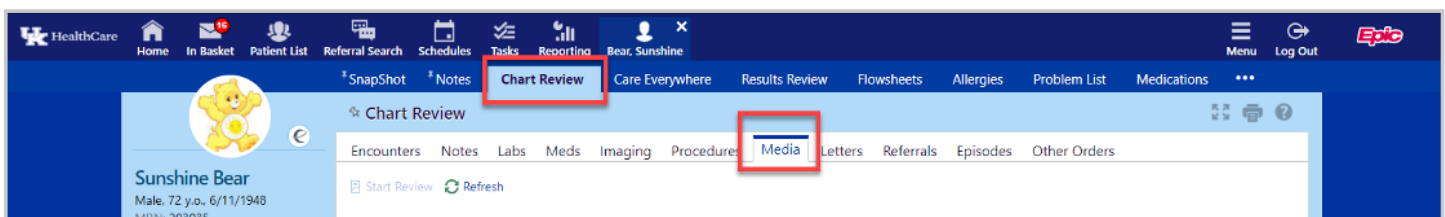
To view information about the patient's eligibility for health plans, coverages, service areas, networks and more, select the **Patient** tab and click **Coverage & Benefits** from the **Patient Profile** menu.

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**.

## 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.**

 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.

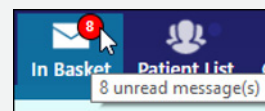
1. Choose the upcoming appointments report you want:
  - a. To view a report for all of your patients, select the **Schedules** tab and click **Upcoming Appts - My Patients**.
  - b. To view a report for one patient, select the **Patient** tab, select your **Patient** and click **Upcoming Appointments**.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




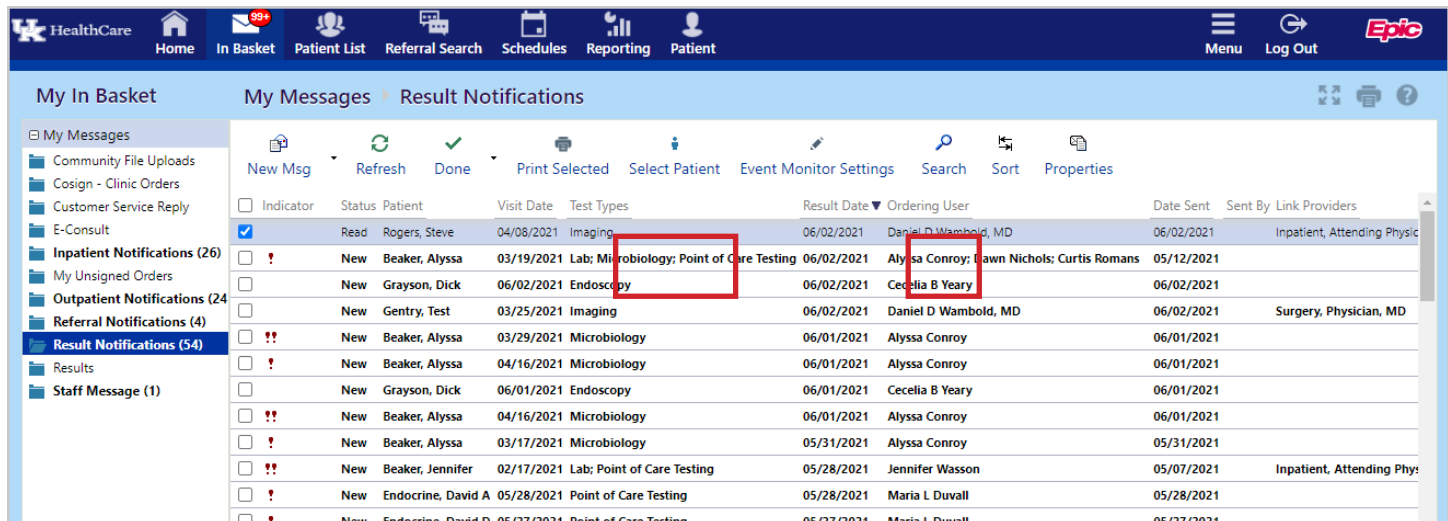
## View a message

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.



The screenshot shows the Epic In Basket interface. The top navigation bar includes Home, In Basket, Patient List, Referral Search, Schedules, Reporting, and Patient. The left sidebar shows 'My In Basket' with folders for Community File Uploads, Cosign - Clinic Orders, Customer Service Reply, E-Consult, Inpatient Notifications (26), My Unsigned Orders, Outpatient Notifications (24), Referral Notifications (4), Result Notifications (54), Results, and Staff Message (1). The main pane displays 'My Messages' with a sub-tab for 'Result Notifications'. The toolbar includes New Msg, Refresh, Done, Print Selected, Select Patient, Event Monitor Settings, Search, Sort, and Properties. The table below shows a list of messages with columns for Indicator, Status, Patient, Visit Date, Test Types, Result Date, Ordering User, Date Sent, and Sent By. The 'Print Selected' button is highlighted with a red box.


Indicator	Status	Patient	Visit Date	Test Types	Result Date	Ordering User	Date Sent	Sent By	Link Providers
<input checked="" type="checkbox"/>	Read	Rogers, Steve	04/08/2021	Imaging	06/02/2021	Daniel D Wambold, MD	06/02/2021	Inpatient, Attending Physic	
<input type="checkbox"/>	New	Beaker, Alyssa	03/19/2021	Lab; Microbiology; Point of Care Testing	06/02/2021	Alyssa Conroy; Dawn Nichols; Curtis Romans	05/12/2021		
<input type="checkbox"/>	New	Grayson, Dick	06/02/2021	Endoscopy	06/02/2021	Cecelia B Yeary	06/02/2021		
<input type="checkbox"/>	New	Gentry, Test	03/25/2021	Imaging	06/02/2021	Daniel D Wambold, MD	06/02/2021	Surgery, Physician, MD	
<input type="checkbox"/>	New	Beaker, Alyssa	03/29/2021	Microbiology	06/01/2021	Alyssa Conroy	06/01/2021		
<input type="checkbox"/>	New	Beaker, Alyssa	04/16/2021	Microbiology	06/01/2021	Alyssa Conroy	06/01/2021		
<input type="checkbox"/>	New	Grayson, Dick	06/01/2021	Endoscopy	06/01/2021	Cecelia B Yeary	06/01/2021		
<input type="checkbox"/>	New	Beaker, Alyssa	04/16/2021	Microbiology	06/01/2021	Alyssa Conroy	06/01/2021		
<input type="checkbox"/>	New	Beaker, Alyssa	03/17/2021	Microbiology	05/31/2021	Alyssa Conroy	05/31/2021		
<input type="checkbox"/>	New	Beaker, Jennifer	02/17/2021	Lab; Point of Care Testing	05/28/2021	Jennifer Wasson	05/07/2021	Inpatient, Attending Phys	
<input type="checkbox"/>	New	Endocrine, David A	05/28/2021	Point of Care Testing	05/28/2021	Maria L Duvall	05/28/2021		
<input type="checkbox"/>	New	Endocrine, David D	05/27/2021	Point of Care Testing	05/27/2021	Maria L Duvall	05/27/2021		

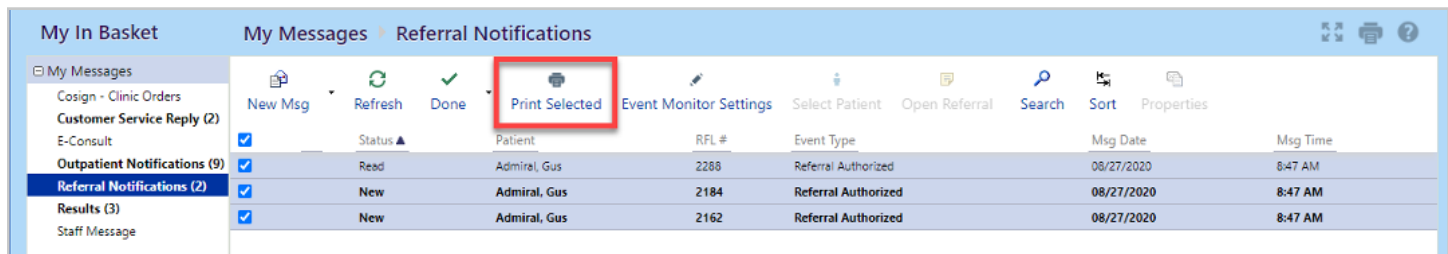
## Search for a message

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**.



The screenshot shows the Epic In Basket interface. The top navigation bar includes Home, In Basket, Patient List, Referral Search, Schedules, Reporting, and Patient. The left sidebar shows 'My In Basket' with folders for Cosign - Clinic Orders, Customer Service Reply (2), E-Consult, Outpatient Notifications (9), Referral Notifications (2), Results (3), and Staff Message. The main pane displays 'My Messages' with a sub-tab for 'Referral Notifications'. The toolbar includes New Msg, Refresh, Done, Print Selected, Event Monitor Settings, Select Patient, Open Referral, Search, Sort, and Properties. The table below shows a list of messages with columns for Status, Patient, RFL #, Event Type, Msg Date, and Msg Time. The 'Print Selected' button is highlighted with a red box.

Status	Patient	RFL #	Event Type	Msg Date	Msg Time
<input checked="" type="checkbox"/>	Read	Admiral, Gus	2288	Referral Authorized	08/27/2020 8:47 AM
<input checked="" type="checkbox"/>	New	Admiral, Gus	2184	Referral Authorized	08/27/2020 8:47 AM
<input checked="" type="checkbox"/>	New	Admiral, Gus	2162	Referral Authorized	08/27/2020 8:47 AM

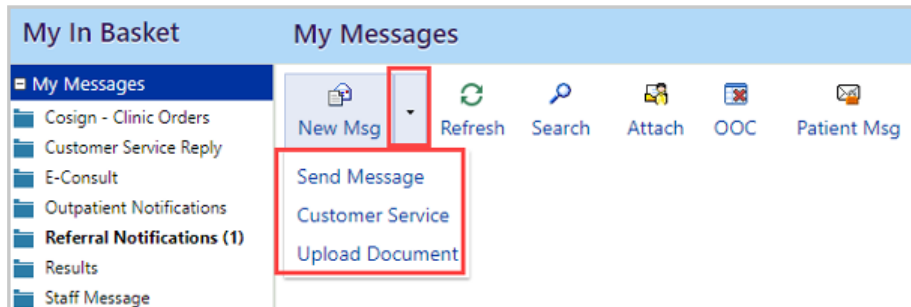




# IN BASKET: SENDING MESSAGES

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 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.

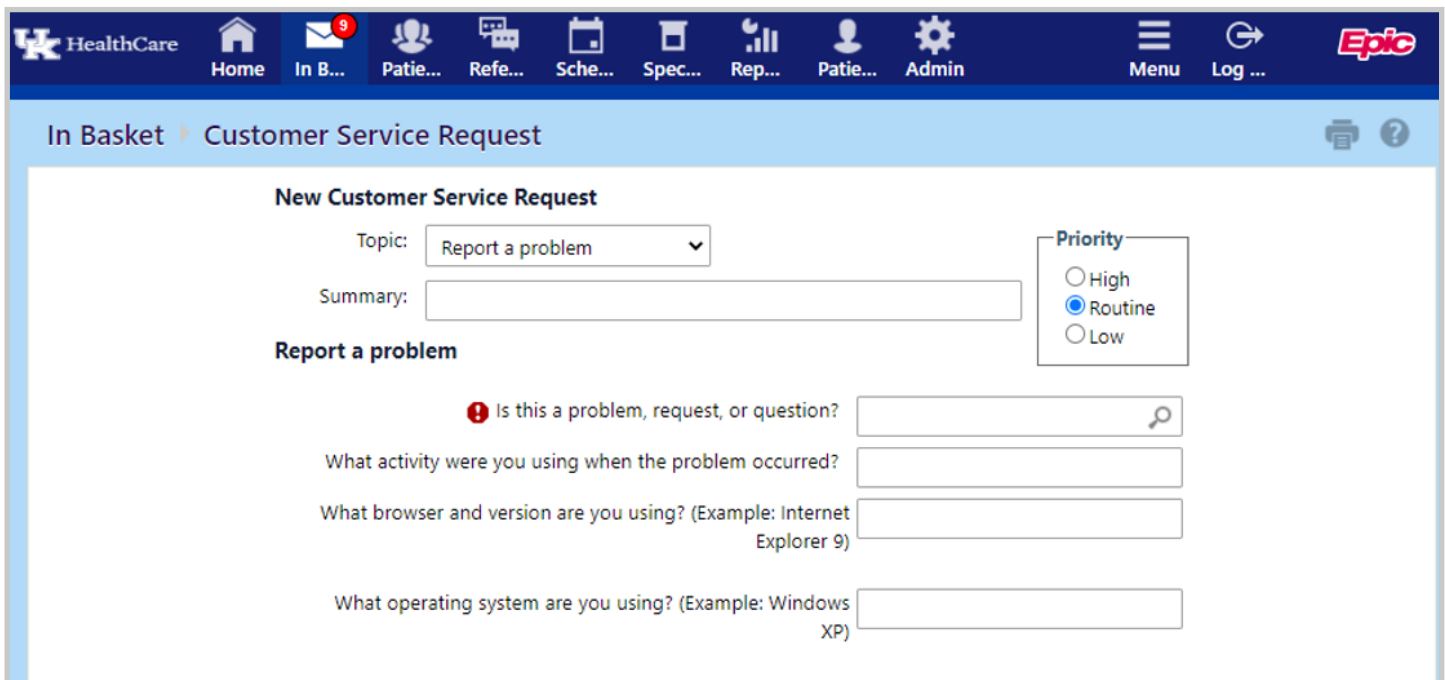
# IN BASKET: CUSTOMER SERVICE REQUESTS

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**.
2. Under **Topic**, select **Report a Problem**.
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**.





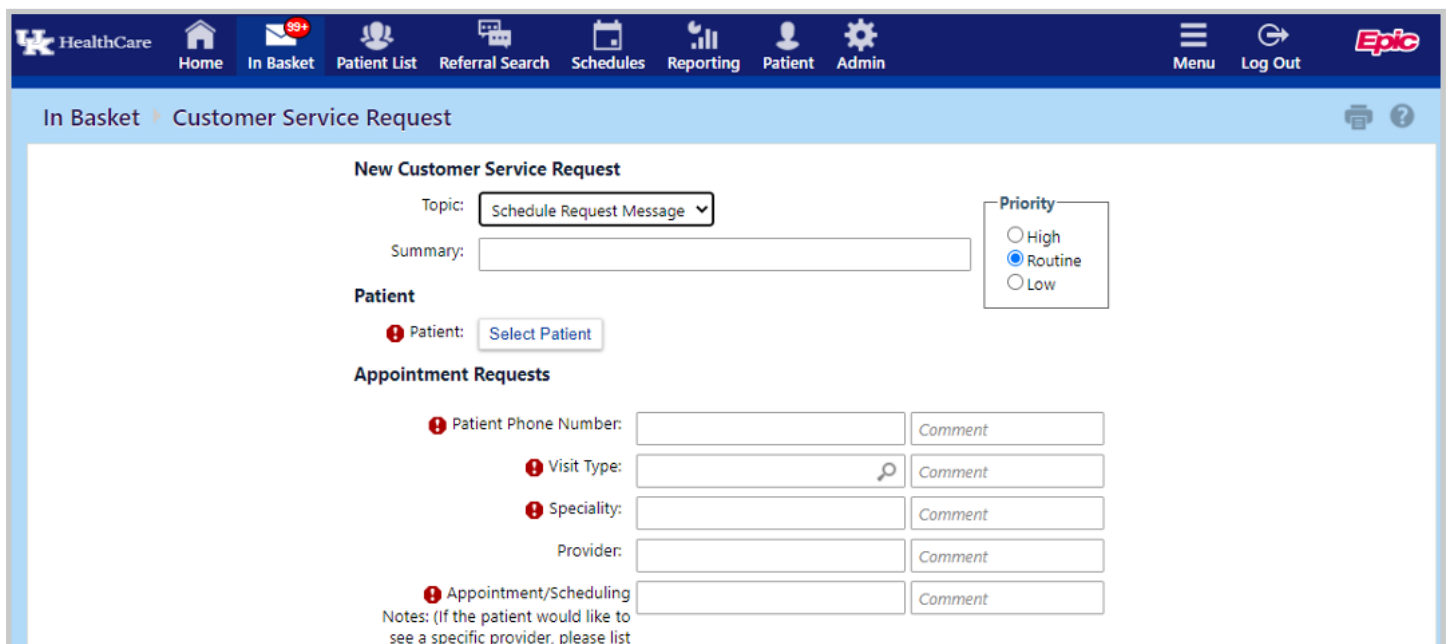
The screenshot shows the Epic HealthCare interface for submitting a new customer service request. The top navigation bar includes links for Home, In Basket (with a notification badge), Patient List, Referrals, Scheduling, Specialties, Reports, Patient Search, and Admin. The main content area is titled 'In Basket > Customer Service Request'. The form is titled 'New Customer Service Request' and includes a 'Topic' dropdown menu set to 'Report a problem', a 'Summary' text field, and a 'Priority' section with radio buttons for High, Routine (selected), and Low. Below these are four required text fields: 'Is this a problem, request, or question?', 'What activity were you using when the problem occurred?', 'What browser and version are you using? (Example: Internet Explorer 9)', and 'What operating system are you using? (Example: Windows XP)'.

## 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**.



**HealthCare** Home In Basket Patient List Referral Search Schedules Reporting Patient Admin Menu Log Out **Epic**

In Basket Customer Service Request

**New Customer Service Request**

Topic:

Summary:

**Patient**

ⓘ Patient:

**Appointment Requests**

ⓘ Patient Phone Number:

ⓘ Visit Type:

ⓘ Specialty:

Provider:

ⓘ Appointment/Scheduling:

Notes: (If the patient would like to see a specific provider, please list)

**Priority**

☐ High


☒ Routine

☐ Low


## 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.

The screenshot shows the 'Settings > Event Settings' page. The 'Event Filter' section allows users to select which types of events they want to receive notifications about. It includes categories for ED Notifications, Financial Notifications, Inpatient Notifications, New Patient Notifications, and Outpatient Notifications. The 'In Basket Settings' section is highlighted with a red box and contains the option 'Any user in my group' selected.

**Settings > Event Settings**

**Event Filter**  
Select which types of events you want to receive notifications about. Note that you might not be notified about sensitive events due to privacy concerns.

**ED Notifications**

- ☒ ED Arrival
- ☒ ED Discharge
- ☒ ED Dismiss

**Financial Notifications**

- ☐ Invoice Received
- ☐ Remittance Advice Received

**Inpatient Notifications**

- ☒ Admission
- ☒ Discharge
- ☒ Labor / Delivery Assessment
- ☐ Transfer to Inpatient

**New Patient Notifications**

- ☐ New Patient Access

**Outpatient Notifications**

- ☐ Appointment Checked-In
- ☒ Appointment Scheduled
- ☐ Encounter Addendum
- ☒ No Show

**Relationship Filter** ⓘ  
Notify me for:

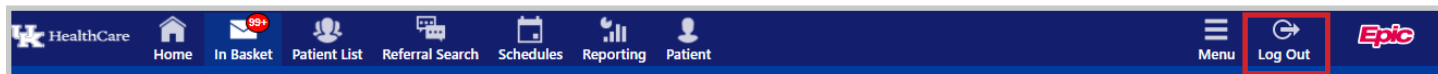
- ☐ All events for patients in my group
- ☒ Only events associated with my group (recommended)
- ☐ Only associations that I select

**In Basket Settings**  
Allow my messages to be handled by:

- ☐ Only me
- ☒ Any user in my group

## 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.



## 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.

**i** 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

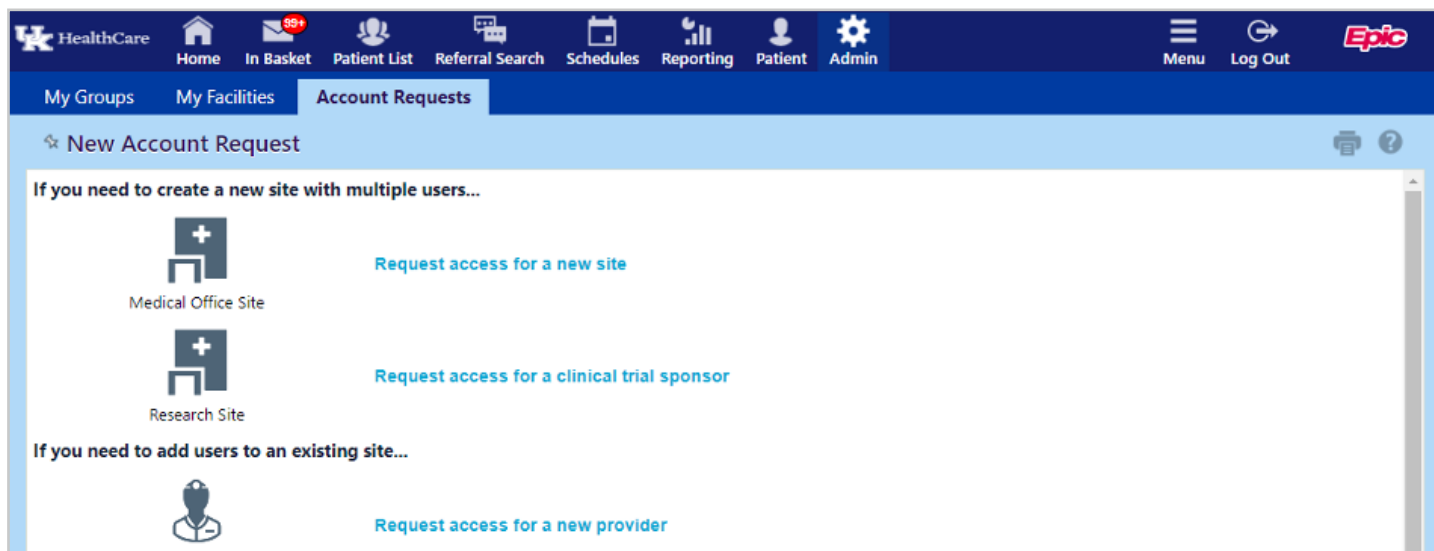
1. Select the **Admin** tab and click **My Groups**.
2. Click the minus  icon in the row for a user to deactivate them.
3. Enter a comment indicating why you are deactivating the user and click  **Deactivate**.

**!** 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.




HealthCare Home In Basket Patient List Referral Search Schedules Reporting Patient Admin Menu Log Out Epic


My Groups My Facilities Account Requests

☆ New Account Request

If you need to create a new site with multiple users...


 Request access for a new site

Medical Office Site

 Request access for a clinical trial sponsor


Research Site

If you need to add users to an existing site...

 Request access for a new provider

- i** If a new user needs to be a Site Administrator for an organization, first select the appropriate user role. Then, select **Make this user a site administrator** at the bottom of the application form.

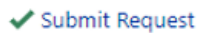

**Other**

 **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**

- i** You can see the status of user requests that have been submitted in the **Status** column.

- i** New user requests can also be completed by the applicant at: [link.uky.edu/EpicCareLink/common/account\\_request\\_main.asp](http://link.uky.edu/EpicCareLink/common/account_request_main.asp). All new user applications should be submitted electronically. We are no longer processing paper applications.


## User roles in EpicCare Link

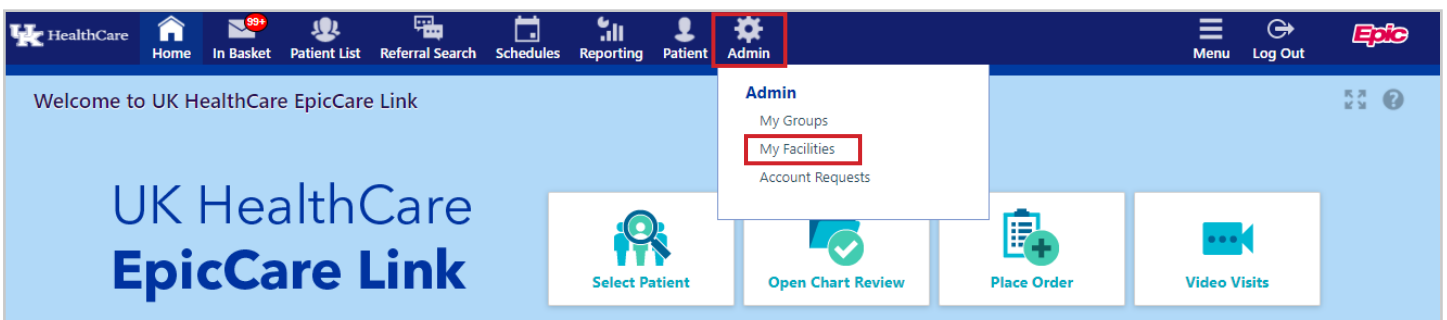
There are nine user roles within EpicCare Link. Each user role has a set of identified features and permissions within the site. These roles include:

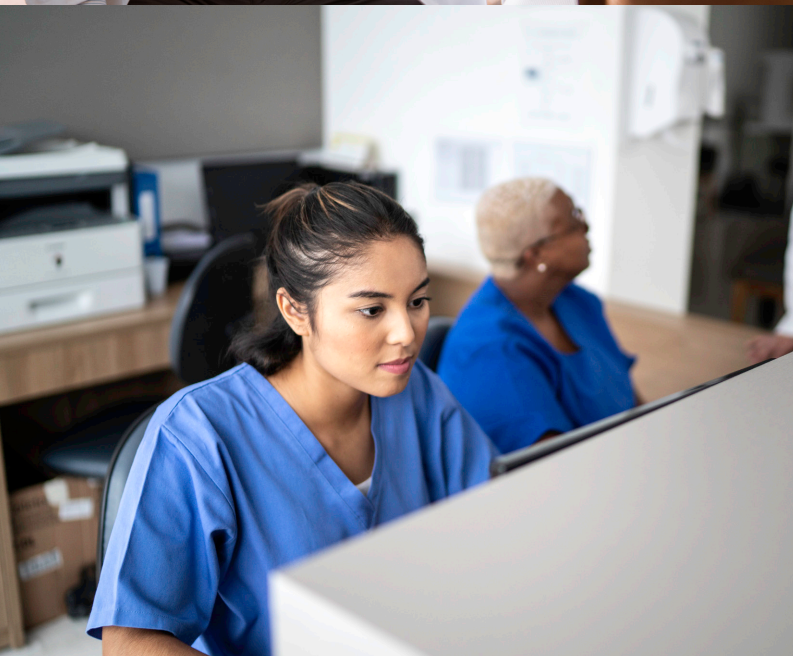
- Provider.
- Support staff.
- School nurse.
- Detention center clinician.
- Psych/social professional.
- Therapist.
- Biller.
- Research monitor.
- Emergency medical technician.

## 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**.





© 2020 Epic Systems Corporation. All rights reserved. PROPRIETARY INFORMATION - This item and its contents may not be accessed, used, modified, reproduced, performed, displayed, distributed or disclosed unless and only to the extent expressly authorized by an agreement with Epic. This item is a Commercial Item, as that term is defined at 48 C.F.R. Sec. 2.101. It contains trade secrets and commercial information that are confidential, privileged and exempt from disclosure under the Freedom of Information Act and prohibited from disclosure under the Trade Secrets Act. After Visit Summary, Analyst, App Orchard, ASAP, Beacon, Beaker, BedTime, Bones, Break-the-Glass, Buggy, Caboodle, Cadence, Canto, Care Everywhere, Charge Router, Chronicles, Clarity, Cogito ergo sum, Cohort, Colleague, Comfort, Community Connect, Cosmos, Cupid, Epic, EpicCare, EpicCare Link, Epicenter, Epic Earth, EpicLink, EpicWeb, Garden Plot, Good Better Best, Grand Central, Haiku, Happy Together, Healthy Planet, Hyperspace, Kaleidoscope, Kit, Limerick, Lucy, Lumens, MyChart, OpTime, OutReach, Patients Like Mine, Phoenix, Powered by Epic, Prelude, Radar, Radiant, Resolute, Revenue Guardian, Rover, Share Everywhere, SmartForms, Sonnet, Stork, System Pulse, Tapestry, Trove, Welcome, Willow, Wisdom, With the Patient at Heart, and WorldWide are registered trademarks, trademarks, or service marks of Epic Systems Corporation in the United States of America and/or other countries. Other company, product, and service names referenced herein may be trademarks or service marks of their respective owners. Patents Notice: [www.epic.com/patents](http://www.epic.com/patents).

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**.

Updated July 13, 2021