

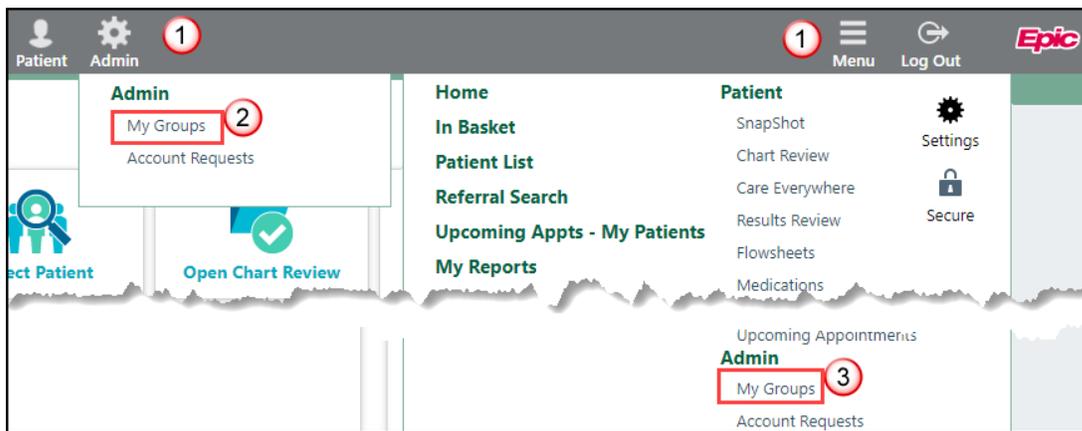
## EpicCare Link Manage My Groups

The Site Administrator will use Manage My Groups to request EpicCare Link (ECL) access for staff members and provide support with passwords and account settings. They can request new user accounts, review/edit demographic details, edit staff members, as well as assist with password resets and account deactivations.

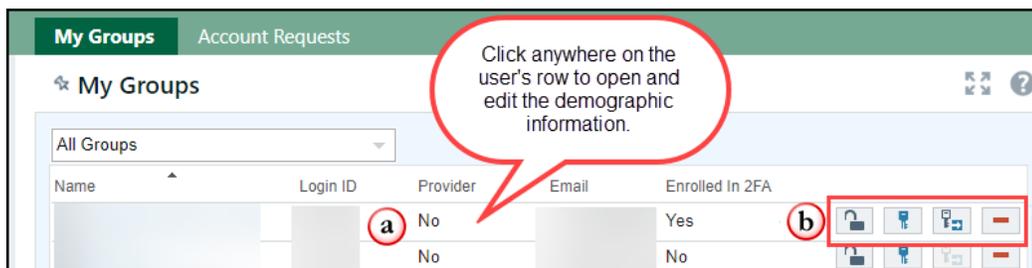
### Open Manage My Groups

Log into EpicCare Link: <https://epiccarelink.uvmhealth.org>.

1. Select **My Groups** from the Menu icon in the top right corner or from the **Admin** icon on the toolbar.



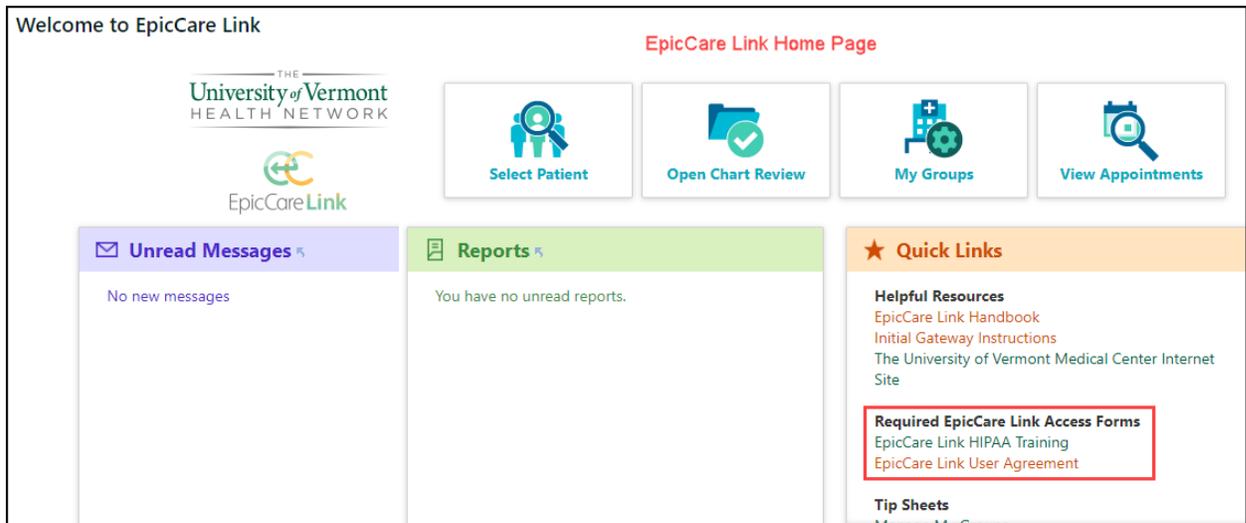
2. **My Groups** tab displays a list of ECL users in the clinic/group.
  - a. Allows the site admin to edit user's demographic information.
  - b. Allow the Site Admin the ability to:
    - Unblock a user's account.
    - Change a user's password.
    - Change two-factor authentication settings.
    - Deactivate a user's account.



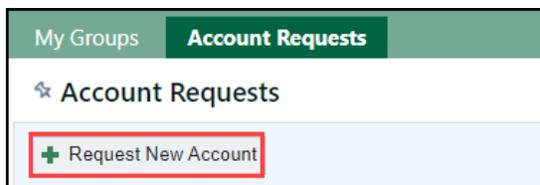
- Account Requests tab** is where the Site Admin will submit New User Account requests.

## Request a New User Account

- From the EpicCare Link home page, select the **EpicCare Link User Agreement** and **EpicCare Link HIPAA Training** hyperlinks. These two documents are required by Compliance and must be completed and signed to gain access to the system.



- The Site Administrator will complete the **New User Agreement Form**.
  - The new user will be required to read and sign the Privacy HIPAA Training. Upload both documents in the New Account Requests section.
- Hover over the **Admin** menu and select **Account Requests**.
  - Click **+ Request New Account**.



- Select the appropriate account type for the staff member.

NOTE: Researchers and Auditors use a different process for account requests.

 **Add a user to an existing site**

Choose a type of user to create:

**Researcher**  
Request access for Researchers

**Auditor**  
Request access for Auditors

**Patient Support Staff**  
Request access for Billers, Care Coordinators, Registrars, or Schedulers

**Clinical Assistant**  
Request access for MA, LNA

**Nurse**  
Request access for a Nurse

**Physician**  
Request access for a Physician, NP, or PA

- Fill in all required details with the  stop sign in the **New Account Request** form. Fields with a  warning icon are recommended but not required.

**\*\*\*NOTE:** For the UVMHN Compliance Team to review the request, it is important to upload the **User Agreement form and Privacy HIPAA Training** using the **Add Files** button. If these are not attached to the request, it will be denied, and a new request will need to be submitted.

- Click **Submit Request**. The request will be electronically sent to the EpicCare Link Team's queue.

✪ New Account Request > Nurse

**User Information**

 First name:

 Middle name:

**5**  Last name:

 Work email:

 Date of birth:

**Site Information**

 User group:

Basic Information - Please enter the last 4 digits of the SS number (IE: 000-00-XXXX) or else a unique four digit PIN the end user must maintain for identity validations and password setup. The address requested must be the user's home address, as required by our compliance office for auditing purposes. Any other address submitted, including the company address, will result in a denial of request. Once denied, an entirely new user request is required.

 SSN:   Work phone:

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**Credentials**

 NPI #:   License #:

 License state:

 Specialty:

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

Provider name:

**Please describe the reason for access.**

Attachments:

**Add files**

10.0 MB Total Allowed 0 Files

 Comments:

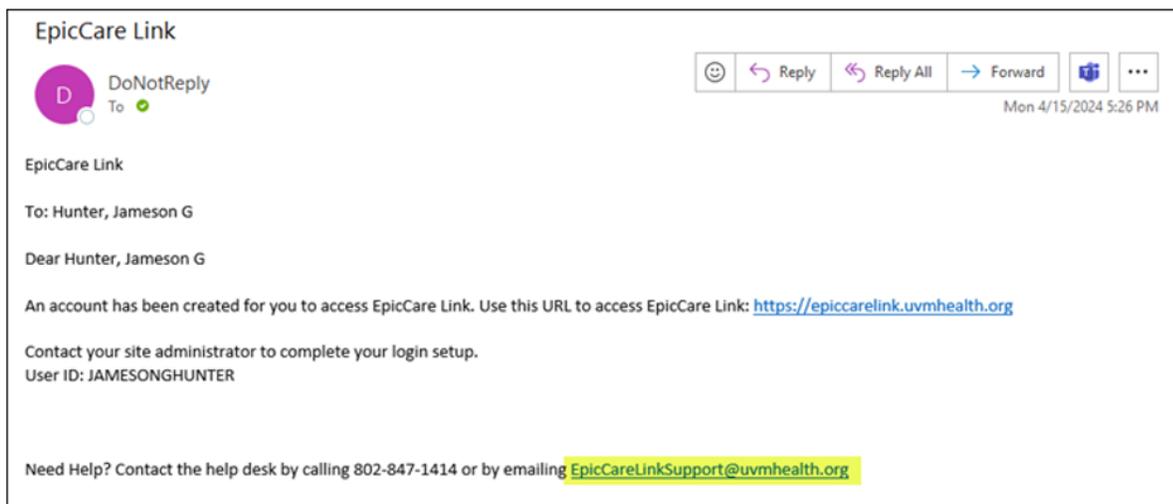
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7. The request will have a status of **Pending** until it is approved or denied.
8. The Site Admin will be able to confirm access when the status changes.
  - a. **Pending:** The new account request has been successfully submitted to the EpicCare Link team for review.
  - b. **Record Generation Completed:** The EpicCare Link account has been provisioned by Epic Security.
  - c. **Completed:** The new user received an automated email from EpicCare Link confirming their account has been successfully activated. This email provides the EpicCare Link URL, the User ID, and the Support Center contact information.
  - d. If you need to follow-up with someone regarding a request they submitted, check the **Submitted By** column in Account Requests to see who submitted the request.

Name	Status	Request Date	Email	Phone	Reference #	Submitted By
FEBTEST, NURSE	Pending	5/8/23	NURSEFEBTEST@gmail.com	802-567-5543	4964	Williams, Thomas
Daffodil, Jessica J	Pending	4/15/24	jjd@gmail.com	802-543-6877	23188	Admin, Bill
LILABET, PRINCESS	Record Generation Completed	5/8/23	LILABET@GMAIL.COM	802-847-1345	4369	Admin, Bill
TEST, SUPPORT	Record Generation Completed	5/8/23	supporttest@gmail.com	802-439-5859	4958	Bode, Adam
Benz, JEFFREY R	Complete	4/7/24	Sherry.Guthrie@uvmhealth.org	802-543-8765	22222	Bode, Adam

### Site Administrator Provides User ID and Temporary Password to New User

When the new request has been completed and the account is active, the user will receive an email confirmation with the EpicCare Link URL, the User ID, and the Support Center contact information for additional support if needed.

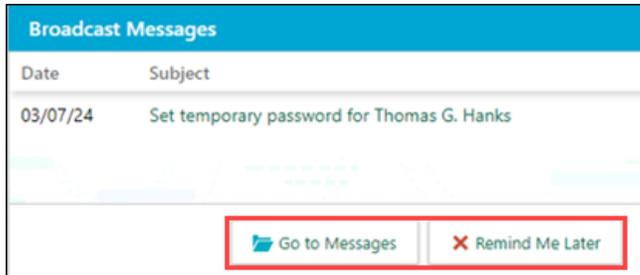


The Site Administrator will receive a **Broadcast Message** at their next login of the account activation and to set a temporary password for the new user.

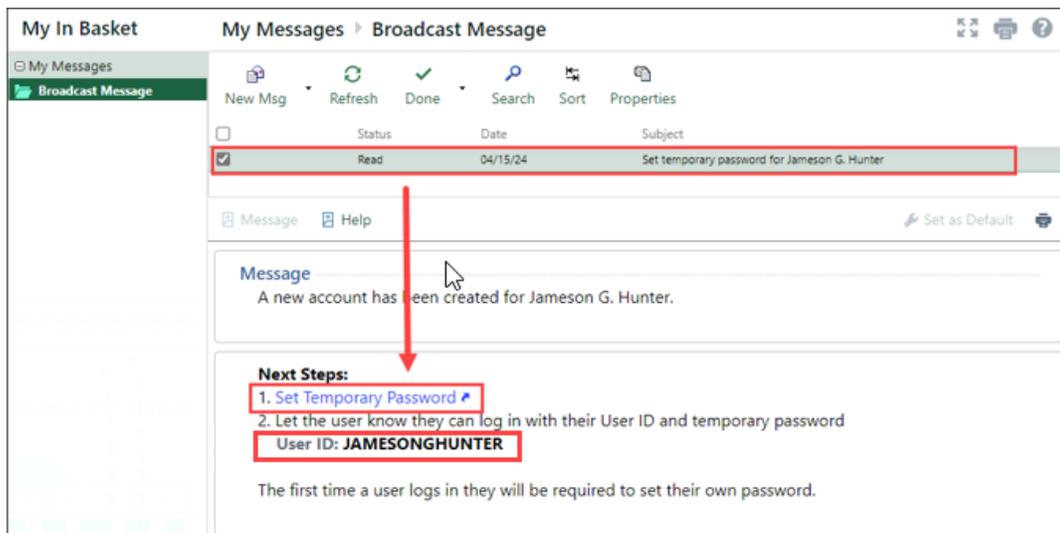
**Epic Tip Sheet**

**EpicCare Link Site Administrators**

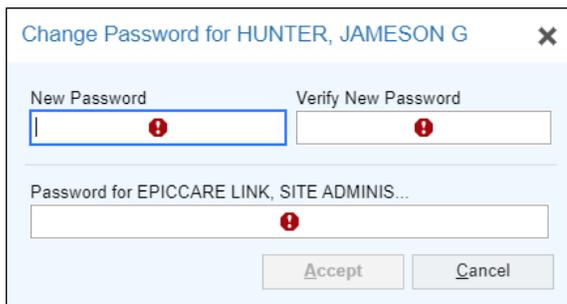
- Click **Go to Messages** to be directed to In Basket for initial password set-up. Selecting **Remind Me Later** will remove the message, but the task will remain in the Broadcast Message In Basket folder.



- In the Broadcast Message folder, single-click the user's row to open the **Next Steps** as the Site Admin.
- Notice under Next Steps the User ID and a link to set a temporary password. The User ID will need to be provided to the user as well as the password.
- Click **Set Temporary Password**.



- The Site Admin will enter a new password, verify the new password, and will confirm these details by entering their own password in the Site Admin field.
- Click **Accept** to confirm the changes.



**Epic Tip Sheet**

**EpicCare Link Site Administrators**

- Provide the password and User UD to the new user. The user will be prompted to change the password at their next login.
- If additional support is needed to login, instruct the user to email the Service Center [EpicCareLinkSupport@uvmhealth.org](mailto:EpicCareLinkSupport@uvmhealth.org) or provide the **EpicCare Link New User Login Instructions** tip sheet located on the EpicCare Link home page.