

Revision Date: 3/22/2024

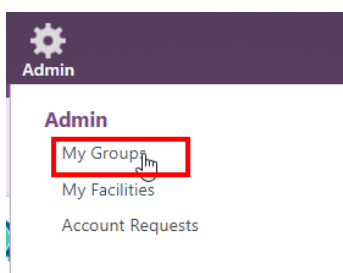
As a **Site Administrator**, you have been granted elevated security to perform all of the tasks below. Please note that **verifying your users at regular intervals is very important** and helps keep our system up to date and our patient data secure.

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## Change a User's Password

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



2. Click the **key icon** in the row for a user to change their password.



3. In the **New Password** and **Verify New Password** fields, enter the new password for the user.
4. In the **Password for <your name>** field, enter your password.
5. Click **Accept**.
  - The next time the user signs in using this password, he/she will be prompted to select a new password of his/her choice.



## Reset a User's Two Factor Authentication Method

1. Select the **Admin** tab and click **My Groups**.
2. Click the **key with arrow icon** in the row for a user to reset their authentication.



3. Click the **Reset** button.
4. It will give you a confirmation and now the user can sign in and choose their authentication method

## 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're deactivating the user and click  **Deactivate**.



Provider-only records should not be deactivated. Please contact your Link Coordinator at your Regional Health Ministry.

## Unblock a User's Account

1. Select the **Admin** tab and click **My Groups**.
2. Find the user whose account is blocked.
  - A **lock** icon will display to the left of the the user's name.

Name	Login ID	Provider	Email	Enrolled In 2FA	Last Login
 Benjamin, Testing	2428	No	Benjamin@Test.com	No	  

3. Select the **unlock** button to the right of the user's name to unlock the user's account.

## Request a New User in EpicCare Link

1. Select the **Admin** tab and click **Account Requests**.
2. Click **+ Request New Account**.
3. Choose the type of account you want to create.
4. In the **User group** field, select the user group to which the user should belong.
5. If you're requesting an account for a new provider and that provider doesn't need to log in to the application, select the check box under the **Basic Information** section to indicate as such.
6. Enter the user's demographic information.
7. Enter a comment about your request, if necessary, and click **✓ Submit Request**.

8. Your request will be routed to a Link Coordinator who will approve/deny the request.



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

9. If approved, you will receive an **In Basket** message (in EpicCare Link) to set the temporary password for the user.

- i. You will also see a **Broadcast Message** when you log into EpicCare Link.
- ii. Click **Go to Messages** to set the temporary password.
- iii. These messages will be in the **Broadcast Message** folder.

10. To set the temporary password, click on the message.

11. You will then see **Next Steps**.

12. Click the link **Set Temporary Password**.

**Next Steps:**

1 [Set Temporary Password](#)

2. Let the user know they can log in with their User ID and temporary password

**User ID: 2433**

The first time a user logs in they will be required to set their own password.

13. In the fields **New Password** and **Verify New Password**, enter a temporary password for the new user. Confirm it by entering your password.



**Password Requirements:** At least 8 characters, 1 capital letter, & 1 number.

14. Next, you will need to communicate the log in credentials to the user (e.g., email, private message, verbally, etc.)

15. When the new user logs into EpicCare Link, they will follow the prompts to set their own password.

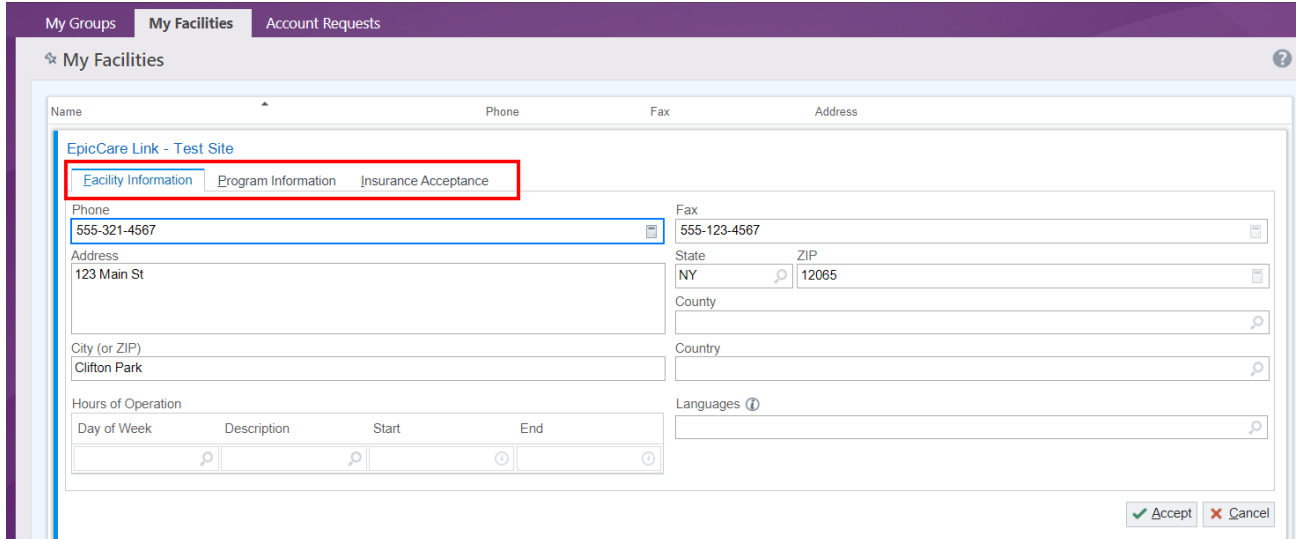
16. The user will then accept the Terms & Conditions and choose their two-factor authentication method.



The new user will receive 3 automatic emails from “donotreply\_link@trinity-health.org”. There is no action needed. They are only to inform the user that an account has provisioned for them and of the password change (password info will not be included in the email).

## Update Facility Contact Information

1. Select the **Admin** tab and click **My Facilities**.
2. Click the name of a facility to update its contact information from the three available tabs:
  - a. Facility Information
  - b. Program Information
  - c. Insurance Acceptance



3. After you've finished editing contact information, click **Accept**.
4. For Post-acute facilities, you can update Current Capacity info for each location via the bed icon:



## Verifying Users at Your Location

You will receive a **Site Verification** message **every 60 days** from your Epic organization asking you to verify that all users working at your site are current and active. These users might include providers who don't log in to the web application but are listed because they need to be schedulable or an ordering provider.

1. From the message, click **Verify Now** and you are brought to the **Site Verification** activity.

**Site Verification**

Groups

- Madison East Skilled Nursing Facility
- Fitchburg Skilled Nursing Facility

**Madison East Skilled Nursing Facility**  
Users who can log into EpicCare Link

Active	Name	Login ID	Provider	Email	Phone	Address	Last Login
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	EpicCare Link, Continued Car...	LINKCCSC	No		555-555-5555	123 anywhere st Madi...	
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Epiccare Link, Physician, MD	LINKMD	Yes		555-5555	123 Anywhere St. Ver...	11/19/2020 9:53 AM
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Epiccare Link, Site Administr...	LINKSITEADMIN	No		555-555-5555	123 Anywhere St. Ver...	2/19/2021 8:48 AM
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Healthy Planet Link, Care Co...	LINKCC	No		555-555-5555	123 Anywhere St. Ver...	11/19/2020 10:22 AM

Providers for this group

Associated	Name	Provider ID	User	Phone (Primary)	Fax (Primary)	Address (Primary)
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Epiccare Link, Physician, MD	E1000011	Yes	555-555-5555		123 Anywhere Street Madison WI 53...
<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Tapestry, Inpatient External Provi...	E1000001	No	555-555-5555		123 Anywhere Street Verona WI 53593

Facilities

Verified	Facility Name	Phone	Fax	Address
<input checked="" type="checkbox"/> Verified	Madison East Skilled Nursing Facility	555-555-5555	555-555-5555	123 Anywhere Street Verona WI 53593-9197

**Acknowledgement**  
I hereby acknowledge, affirm, and agree that the user, provider, and facility information stated here is true, correct, and complete to the best of my knowledge and belief and is furnished in good faith.

☒ Acknowledge & Verify

- 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.
  - In the **Active?** column, select **Yes** for active users at your location and select **No** for all the users whose accounts you want to deactivate.
- After completing review of all users, click **✓ Acknowledgement & Verify** to acknowledge that you have reviewed and confirmed the list of users.

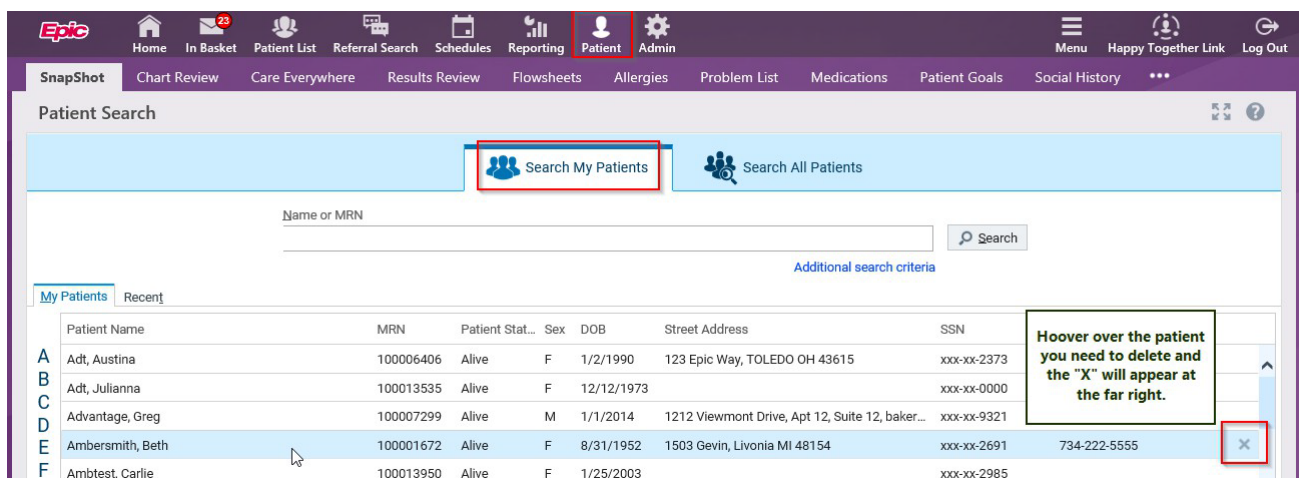


Please contact your Link Coordinator at your Regional Health Ministry if you have any issues. It is very important to keep active/inactive users up to date.

## Removing a Patient from the Patient List

Only Site Administrators have the security to remove a patient from your Patient List.

- Navigate to the **Patient Activity**.
- Select **Search My Patients**.
- Hoover over the patient you need to remove, and the **X** will appear at the far right.
- Click the **X**.



Patient Name	MRN	Patient Stat...	Sex	DOB	Street Address	SSN
Adt, Austina	100006406	Alive	F	1/2/1990	123 Epic Way, TOLEDO OH 43615	xxx-xx-2373
Adt, Julianna	100013535	Alive	F	12/12/1973		xxx-xx-0000
Advantage, Greg	100007299	Alive	M	1/1/2014	1212 Viewmont Drive, Apt 12, Suite 12, baker...	xxx-xx-9321
Ambersmith, Beth	100001672	Alive	F	8/31/1952	1503 Gevin, Livonia MI 48154	xxx-xx-2691
Ambtest, Carlie	100013950	Alive	F	1/25/2003		xxx-xx-2985

## Updating Providers

The providers (Physicians, NP, PA) at your site's location is what drives the Patient List, so it's important to have your provider group up to date. If you have changes to your providers in your practice, please contact your Link Coordinator at your Regional Health Ministry to have them update the build of your group.

## Finding your Regional Link Coordinator

You can find your Link Coordinator's contact information in the **Customer Support Contact** document under the **Quick Links** in EpicCare Link.

### ★ Quick Links

#### Documents

- Community Resources
- Community User Quick Start Guide
- Responding to Service Requests Job Aid
- Site Coordinators Job Aid
- Working with Referrals Job Aid
- Customer Support Contacts**
- E-Learning: Introduction to EpicCare Link
- E-Learning: Placing Orders & Specimen Collection
- E-Learning: Site Coordinator Workflows