

The EpicCare Link User request process is being revised to adhere to the new PAMA requirements

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What is EpicCare Link?

EpicCare Link is a web application that securely provides a remote access to UnityPoint Health patient's electronic health record to their community affiliates. This connection permits access to only patients with whom a provider has a defined relationship in UnityPoint Health's version of Epic to maintain patient confidentiality.

What information is available with EpicCare Link?

EpicCare Link provides view-only access to the patient's full UnityPoint Health medical record, including lab and diagnostic test results, hospitalization records, procedural information, medications, allergies and more. EpicCare Link also allows providers to place outpatient orders.

Who are EpicCare Link users?

EpicCare Link access is granted to external clinics, nursing home and healthcare agencies that care for our UnityPoint Health patients. Users can find their patient or resident and view results, notes and documentation that was completed at a UnityPoint Health location.

In addition, independent clinic providers can place one-time orders for imaging procedures to be done at a UnityPoint Health location. All imaging orders placed directly in EpicCare Link will meet the PAMA requirements as we have imbedded Care Select software in the Epic ordering software.

*Note: Users that enter Pre-op orders on a scheduled procedure will continue to follow that same process in Epic Hyperspace.

How will it make my work easier?

- Saves time! Eliminate the need to call, request records and wait for a fax.
- Get a more transparent flow of information between physicians.
- Reduce the number of faxes containing patient information to a facility.
- See information in real-time.
- Receive provider notifications for events like lab results, admissions, and discharges.

Steps to Request EpicCare Link

Follow the steps below to get access to EpicCare Link: (* designates a required field)

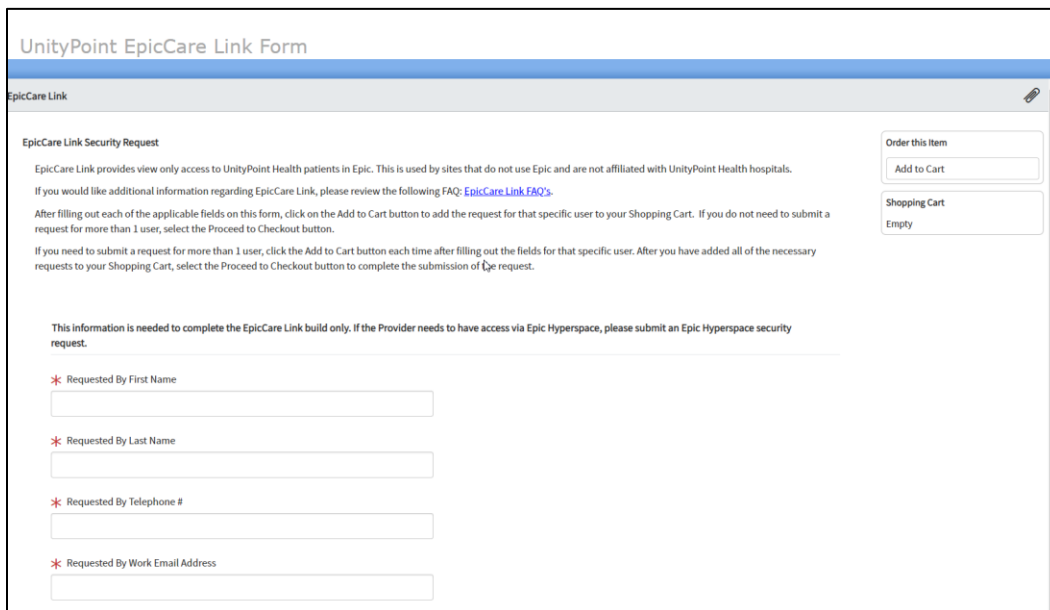
Site Administrator

Each site needs to select a Site Administrator. It is recommended that each site have 2 assigned. These people will be responsible for requesting new user access, notifying UPH when a user leaves their organization and completing the required Site Verification.

Submitting a Request for a New Facility

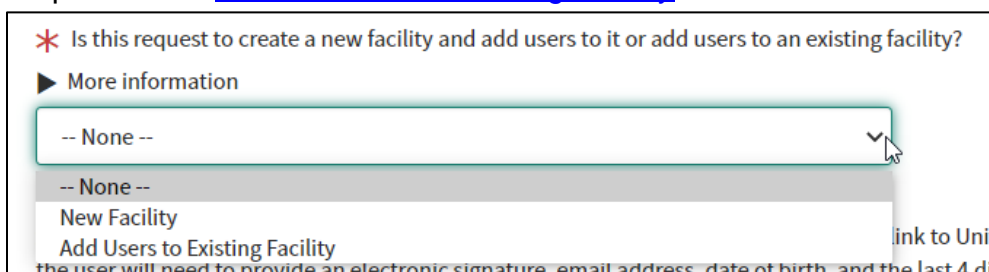
The request form is completed in the UnityPoint Health Service Now portal.

1. Go to https://unitypoint.service-now.com/u_epiccare_login.do
 - Once on this page, the Site Administrator will need to complete the electronic request form.



The screenshot shows the 'UnityPoint EpicCare Link Form' in a browser window. The form title is 'EpicCare Link Security Request'. Below the title, there is explanatory text: 'EpicCare Link provides view only access to UnityPoint Health patients in Epic. This is used by sites that do not use Epic and are not affiliated with UnityPoint Health hospitals. If you would like additional information regarding EpicCare Link, please review the following FAQ: [EpicCare Link FAQs](#). After filling out each of the applicable fields on this form, click on the Add to Cart button to add the request for that specific user to your Shopping Cart. If you do not need to submit a request for more than 1 user, select the Proceed to Checkout button. If you need to submit a request for more than 1 user, click the Add to Cart button each time after filling out the fields for that specific user. After you have added all of the necessary requests to your Shopping Cart, select the Proceed to Checkout button to complete the submission of the request.' Below this text, there is a note: 'This information is needed to complete the EpicCare Link build only. If the Provider needs to have access via Epic Hyperspace, please submit an Epic Hyperspace security request.' The form contains four required fields, each marked with a red asterisk: 'Requested By First Name', 'Requested By Last Name', 'Requested By Telephone #', and 'Requested By Work Email Address'. To the right of the form, there are two buttons: 'Order this Item' and 'Add to Cart', and a 'Shopping Cart Empty' indicator.

2. Enter the information for the person requesting the access for the site, aka: Site Administrator (First and Last Name, contact information)
3. Select from the drop down asking if this is a request to create a new facility with new users or if you are adding users to an existing facility.
 - If you are adding users to an existing facility already in the system, please see [Add Users to an Existing Facility](#)

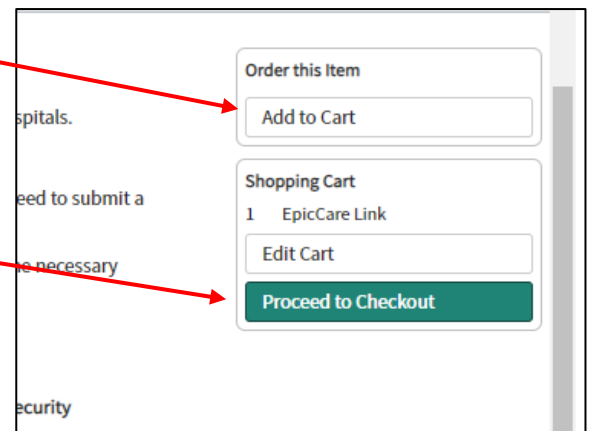


The screenshot shows a dropdown menu with the question: '* Is this request to create a new facility and add users to it or add users to an existing facility?'. Below the question is a 'More information' link. The dropdown menu is open, showing three options: '-- None --', 'New Facility', and 'Add Users to Existing Facility'. A mouse cursor is hovering over the 'Add Users to Existing Facility' option. The text 'link to Uni' is partially visible at the bottom right of the dropdown menu.

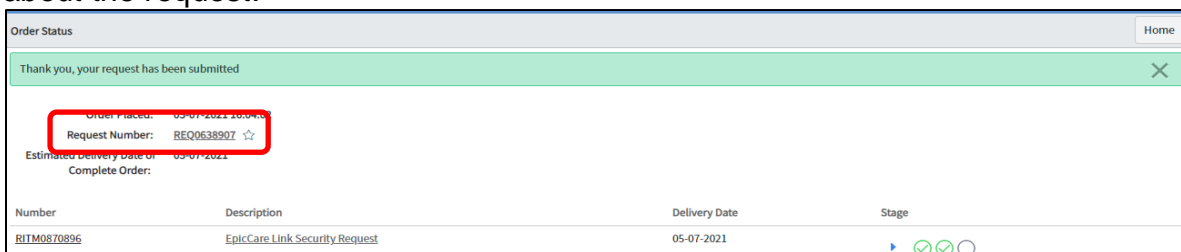
4. Fill out the Facility information (Clinic Manager, Facility Name, Address, Phone, Type of facility, Specialty, and Region).
5. Read the statement and select the button indicating that you have read and understand.

Each of the user(s) that a request is submitted for will receive an email containing a link to UnityPoint Health's Information Protection Security Agreement. On the agreement the user will need to provide an electronic signature, email address, date of birth, and the last 4 digits of their social security number which should match the information provided on this request. An EpicCare Link account will not be setup until their Information Protection Security Agreement is signed and submitted. The user has 3 weeks from the date this request is submitted to sign the security agreement; a reminder notification will be sent after 2 weeks have elapsed. If the security agreement is not signed within 3 weeks, the request for that user will be cancelled and another request will need to be submitted in order for an EpicCare Link account to be created for that user.

6. Does the user have an existing UnityPoint Health account? Answer Yes, No or I don't know
7. Fill out the Information for the user needing access (First, Middle, Last Name, DOB, Last 4 of SS#, former names/aliases, Email, Title)
 - This helps the security team confirm they have the correct user for identity purposes
8. Does this user need to be a Site Administrator?
 - As a Site Administrator, select Yes
9. Is this user replacing a staff person?
10. Does this user need to place orders? Answer Yes if this user will be placing the one-time orders in EpicCare Link
11. Free text field for the Reason Requesting Access
12. When complete, scroll to the top, click Add to Cart.
13. Repeat the steps 6-11 for each additional user that you are requesting access for.
14. Once all users are entered, return to the top and click Proceed to Checkout.



15. You will then see an Order Status screen indicating that your request has been submitted.
 - Please keep a record of the request number in the event you need to call and inquire about the request.

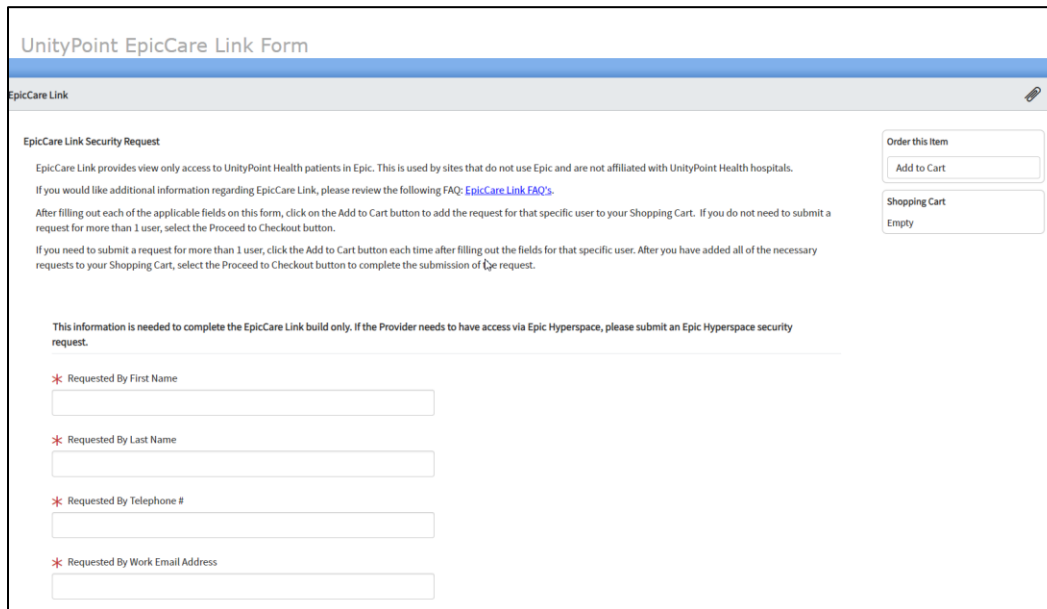


16. Once the build is complete, the user will be notified via email with their log in information.
 - The Site Admins will NOT receive this information for security reasons.

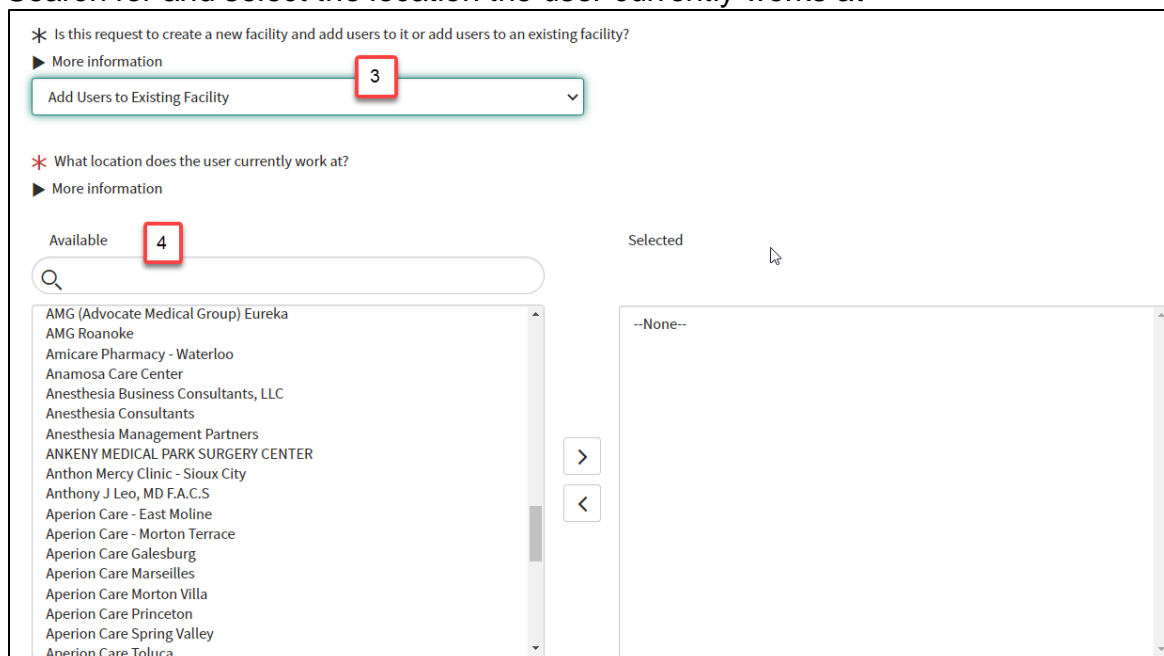
Add Users to an Existing Facility

Additional users can be added to an existing facility by following these steps:

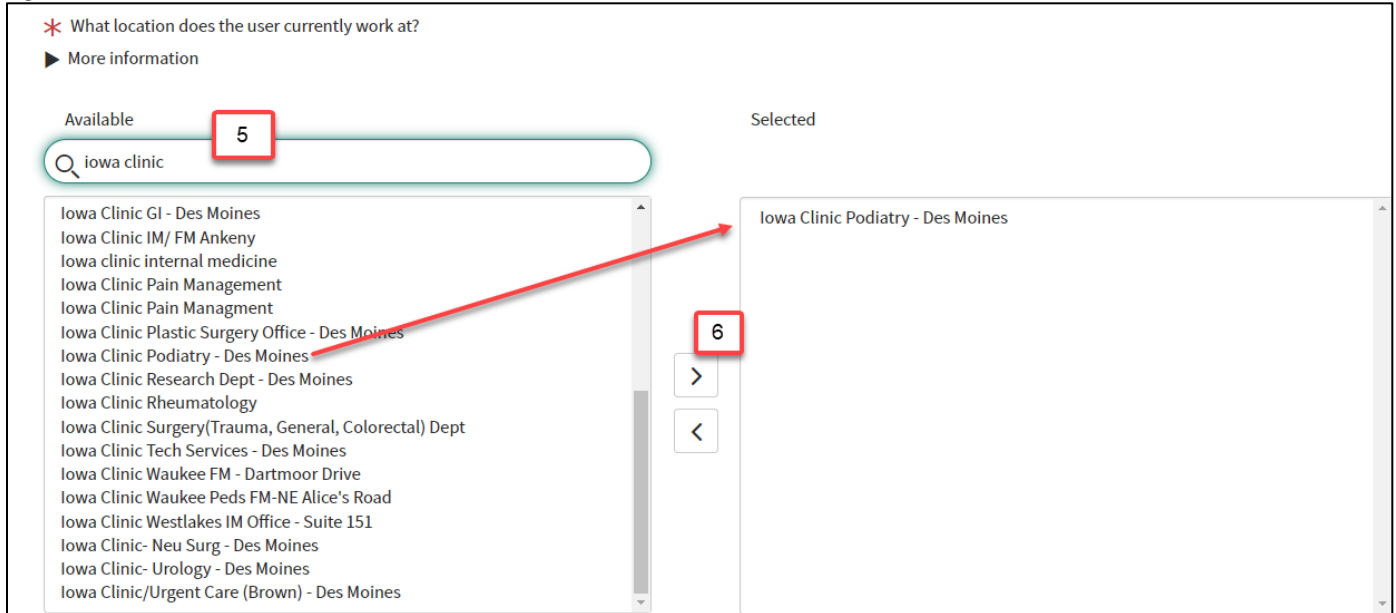
- Go to https://unitypoint.service-now.com/u_epiccare_login.do
 - Once on this page, the Site Administrator will need to complete the electronic request form.



- Enter the information for the person requesting the access for the site, aka: Site Administrator (First and Last Name, contact information)
- Select from the drop down that you are adding users to an existing facility.
- Search for and select the location the user currently works at



5. To quickly find your location, type in the search field
6. Highlight the location on the left and click the arrow in the middle to add to the Selected column on the right.



* What location does the user currently work at?

► More information

Available 5

Q iowa clinic

- Iowa Clinic GI - Des Moines
- Iowa Clinic IM/ FM Ankeny
- Iowa clinic internal medicine
- Iowa Clinic Pain Management
- Iowa Clinic Pain Management
- Iowa Clinic Plastic Surgery Office - Des Moines
- Iowa Clinic Podiatry - Des Moines
- Iowa Clinic Research Dept - Des Moines
- Iowa Clinic Rheumatology
- Iowa Clinic Surgery(Trauma, General, Colorectal) Dept
- Iowa Clinic Tech Services - Des Moines
- Iowa Clinic Waukee FM - Dartmoor Drive
- Iowa Clinic Waukee Peds FM-NE Alice's Road
- Iowa Clinic Westlakes IM Office - Suite 151
- Iowa Clinic- Neu Surg - Des Moines
- Iowa Clinic- Urology - Des Moines
- Iowa Clinic/Urgent Care (Brown) - Des Moines

Selected

Iowa Clinic Podiatry - Des Moines

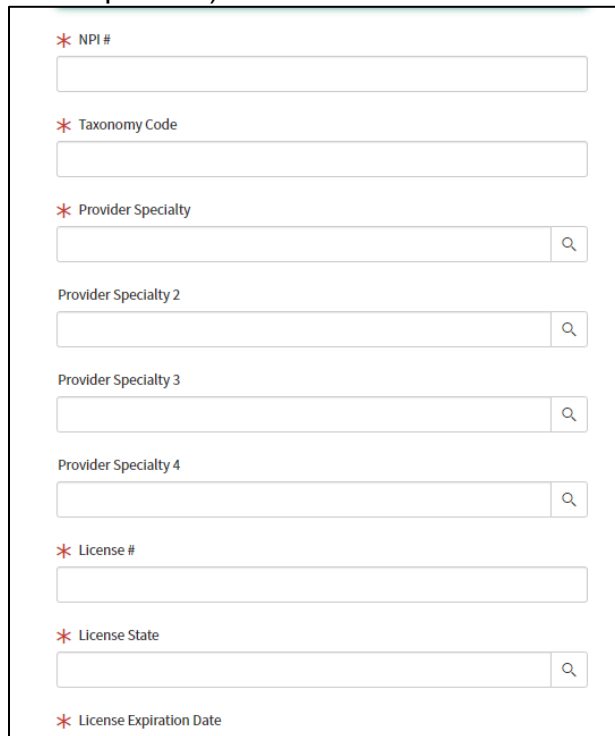
6 >

<

7. Read the paragraph and select the button to indicate that you have read and agree to the statement below.

Each of the user(s) that a request is submitted for will receive an email containing a link to UnityPoint Health's Information Protection Security Agreement. On the agreement the user will need to provide an electronic signature, email address, date of birth, and the last 4 digits of their social security number which should match the information provided on this request. An EpicCare Link account will not be setup until their Information Protection Security Agreement is signed and submitted. The user has 3 weeks from the date this request is submitted to sign the security agreement; a reminder notification will be sent after 2 weeks have elapsed. If the security agreement is not signed within 3 weeks, the request for that user will be cancelled and another request will need to be submitted in order for an EpicCare Link account to be created for that user.
8. Does the user have an existing UnityPoint Health account? Answer Yes, No or I don't know
9. Fill out the Information for the user needing access (First, Middle, Last Name, DOB, Last 4 of SS#, former names/aliases, Email, Professional Title)
 - This helps the security team confirm they have the correct user for identity purposes

10. Is the user a Provider? If yes, enter the NPI#, Taxonomy Code, Specialty, License #, State and Expiration)



A form with the following fields:

- * NPI #
- * Taxonomy Code
- * Provider Specialty
- Provider Specialty 2
- Provider Specialty 3
- Provider Specialty 4
- * License #
- * License State
- * License Expiration Date

11. Does this user need to be a Site Administrator? Yes or NO

- If this user will also be a Site Admin, select Yes

12. Is this user replacing a staff person?

- Not everyone in the facility needs access and roles may change
- If this user is replacing a Site Admin, select yes
- Additional questions about the person who left/is being replaced will appear

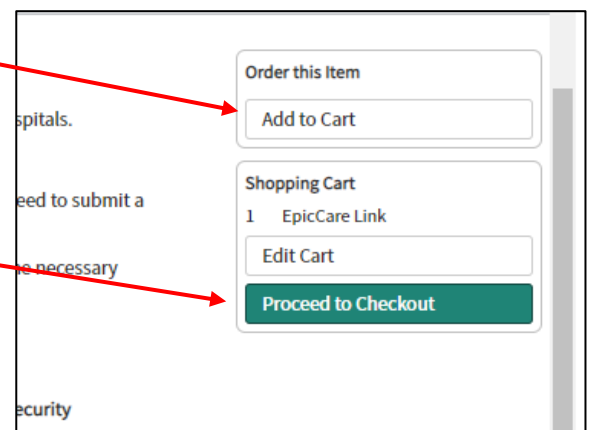
13. Does this user need to place orders? Answer Yes if this user will be placing the one-time orders in EpicCare Link

14. Free text field for the Reason Requesting Access

15. When complete, scroll to the top, click Add to Cart.

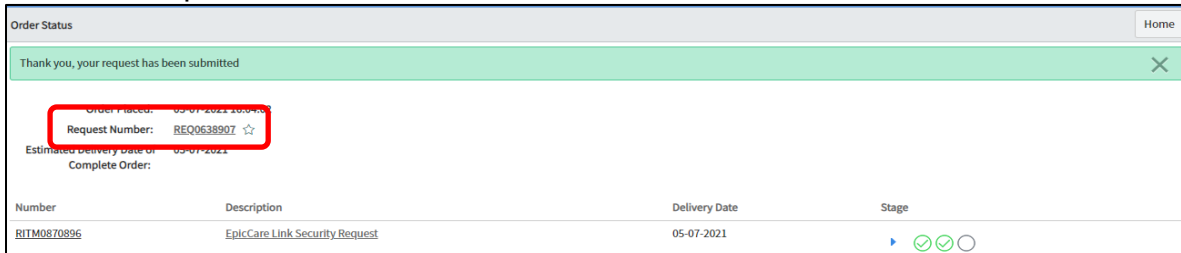
16. Repeat the steps 6-11 for each additional user that you are requesting access for.

17. Once all users are entered, return to the top and click Proceed to Checkout.



A screenshot of a shopping cart interface. It shows a list of items with an 'Add to Cart' button. Below the list is a 'Shopping Cart' section with an 'Edit Cart' button and a 'Proceed to Checkout' button. Red arrows point from the text in steps 15 and 17 to the 'Add to Cart' and 'Proceed to Checkout' buttons respectively.

18. You will then see an Order Status screen indicating that your request has been submitted.
- Please keep a record of the request number in the event you need to call and inquire about the request.



The screenshot shows the 'Order Status' page with a green notification bar at the top that says 'Thank you, your request has been submitted'. Below this, the 'Request Number: REQ0638907' is highlighted with a red box. Other details include 'Estimated Delivery Date or Complete Order: 05-07-2021'. At the bottom, there is a table with the following data:

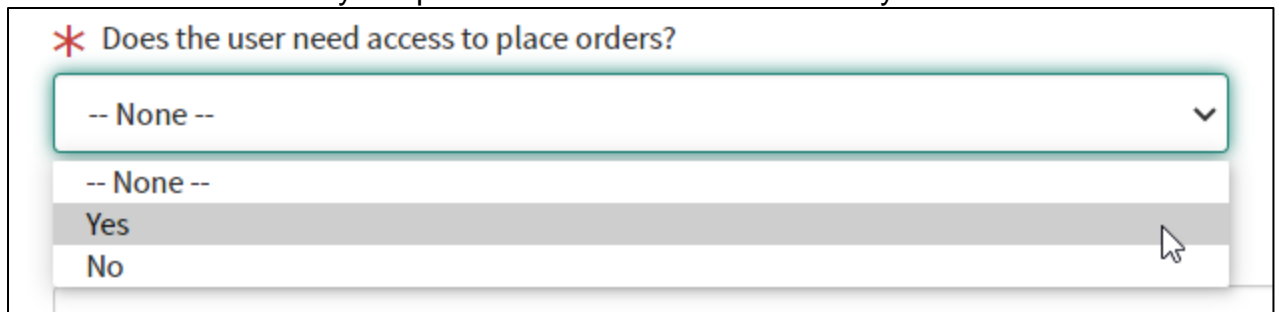
Number	Description	Delivery Date	Stage
RITM0870896	EpicCare Link Security Request	05-07-2021	▶ ✓ ✓ ○

19. Once the build is complete, the user will be notified via email with their log in information.
- The Site Admins will NOT receive this information for security reasons.

Updating Current Users for Order Entry

Existing EpicCare Link can have their access updated to enter orders. The Site Administrator can follow these steps:

1. Go to https://unitypoint.service-now.com/u_epiccare_login.do
2. Fill out your information on who is entering the request.
3. Select “Add Users to an Existing Facility”
4. Search for and select your facility.
5. Read and acknowledge the statement regarding the security request.
6. Does the user have an existing UPH network account?
 - Answer yes if they already have a log in and password for EpicCare Link.
7. Fill out the user information. This helps the security team find the correct user with the name, DOB and last 4 of SS#, email, Professional Title)
8. Is the user a provider (MD, DO, mid-level, resident, etc.)?
 - If yes, enter the NPI#, Taxonomy Code, Specialty, and License information)
9. Answer the Site Administrator question. Answer Yes or No
10. Is this User Replacing another? Select “Is not replacing a staff person”
11. Does the user need access to place orders? Select Yes in the drop down.
 - This field will tell security to update their access for Order Entry



* Does the user need access to place orders?

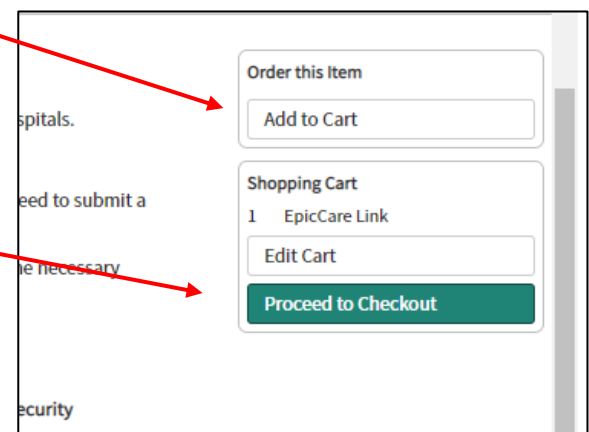
-- None --

-- None --

Yes

No

12. When complete, scroll to the top, click Add to Cart.
13. Repeat the steps 6-11 for each additional user that you are requesting access for.
14. Once all users are entered, return to the top and click Proceed to Checkout.



Order this Item

Add to Cart

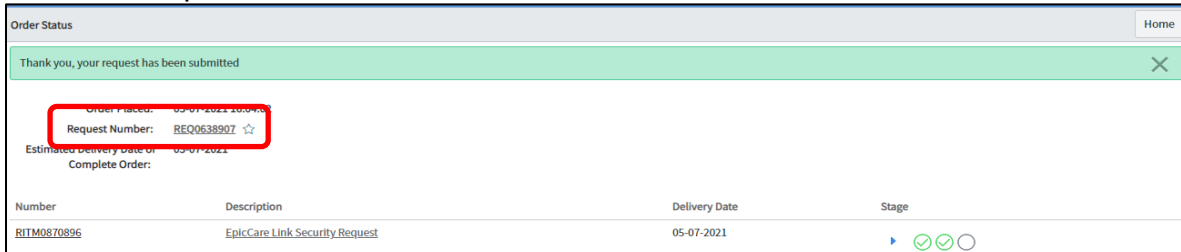
Shopping Cart

1 EpicCare Link

Edit Cart

Proceed to Checkout

15. You will then see an Order Status screen indicating that your request has been submitted.
- Please keep a record of the request number in the event you need to call and inquire about the request.



16. Remind the user to monitor their email for the security agreement so their access is not delayed.
17. Once the build is complete, the user will be notified via email with their log in information.
- The Site Admins will NOT receive this information for security reasons.

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This guide is based on Epic Nov 2020.

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