

EpicCare Link Community User Quick Start Guide

Role(s) affected: All EpicCare Link Community Users

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Getting Started

EpicCare Link is a tool that provides real-time web access to patient information so you can access patients' clinical data and communicate with Middlesex Health to provide quality patient care. You can also use EpicCare Link to quickly refer patients to our organization.

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.

Help and Contact Information

For help using an activity, click  .

- ❖ If you forget your password or can't log in, please contact your organization's Site Administrator identified by Middlesex Health.
- ❖ For all other issues, please contact our Help Desk at (860)358-4040 or by email to helpdesk@midhosp.org.

Browser, System, and Connection Requirements

You must use one of the following Internet browsers to access EpicCare Link:

- ❖ Apple Safari 9 and any later versions
- ❖ Google Chrome 50 and any later versions
- ❖ Microsoft Internet Explorer 11
- ❖ Mozilla Firefox 45 and any later versions

On tablets, you must use iPad Safari or Android Chrome browsers.

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.

How Do I Log In?

1. There are two options to log into Middlesex Health EpicCare Link:
 - a. Visit our website <https://middlesexhealth.org/professionals-and-staff/staff-access> and select EpicCare Link, or
 - b. Open your web browser and go to <https://epiccarelink.middlesexhealth.org>
2. Enter your M or N# and password
3. Enter your single-use passcode

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: Use these tabs to open different activities in EpicCare Link. Each tab contains one or more related activities. For example, the Patient tab contains patient-specific activities. When you click a tab, the default activity for that tab opens.

B) Activity Menu: Use this menu to open the various activities that are contained in the selected navigation tab. For example, the Patient tab activity menu contains the Allergies and Chart Review activities.

- ❖ 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 contained in the tab.
- ❖ You can also click  to pin an activity so it appears first in the menu. If you pin multiple activities, they appear in the order that you pinned them. Click and drag pinned activities in the menu to change their order.

C) Action Options: Use these buttons, located on the top right of the screen, to see all of your available activities or to log out.

How Do I Log Out?

To maintain patient confidentiality, you need to log out or secure your screen when you are done working or have to leave the computer for any reason. There are two ways to do this:

- ❖ Click  **Log Out**. The next time you log in, you are directed to your start page.
- ❖ Secure the computer by going to **Menu >Secure**. When you log back in, you return to the same activity that you were using before you secured the screen.

Accessing the Patient Chart

Select your Patient's Chart from a List of Current Patients

1. Click  **Patient** and go to the **My Patients** tab.
 - a. If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name.
2. Click a patient's name to open his chart.
3. To view a list of currently admitted patients, select the **Patient List** navigation tab and select the tab for admitted patients. For patients to appear on this list, you must have a provider relationship of PCP, attending, admitting, or treatment team on the admission.
4. Select a patient's name to view additional patient-specific information in the report pane.
5. If you view a report frequently, click  to add a button for the report to the toolbar. From that page, you can also remove your report toolbar buttons, rearrange the order of buttons, and rename the reports.
6. Click  to open a patient's chart.

*Tip: To see only the patients for whom you are the PCP, select your name in the **Filter by provider** field.*

Search for a Patient's Record Based on Name or MRN

1. Click  **Patient** and enter the patient's name or MRN.
2. In the Search Results window, click the name of the patient whose chart you want to open.

*Tip: In two clicks, you can quickly open a patient chart that you recently had open. In the **Search My Patients** section of the Patient Search activity, select the **Recent** tab and then click the name of the patient.*

What if I Can't Find a Patient?

If you don't find a patient using the methods above, you might not have been granted access to her chart yet, or she might not have a record in the system. Use the Search All Patients section of the Patient Search activity when you need to gain immediate access to a patient's chart for the first time, such as in the case of an emergency. Note that you must enter the patient's first and last name when using this method.

1. If your initial search returns no results, click **Search All Patients** from the Search Results window.
2. Complete all of the required fields, and then click  **Search**.
3. Select the patient record you want to open, select the reason you need access to the patient's chart in the **Reason** field, and add any comments. Enter any additional comments and 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. You can tailor which types of events you're notified of and for which patients. For example, you can choose to be notified of only the events associated with you or certain providers in your group. You're associated with an event if you're the attending provider, admitting provider, referring provider, a treatment team member, a care team member, or the patient's PCP.

1. From the Home screen, click  in the Event Monitor section.
2. Choose which types of events you'll receive notifications for in the Event Filter section. To receive notifications for all the available event types, select the **Events I Will Receive** check box.
3. Choose which events you'll 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, even if the referral isn't to you or your group.
 - b. **Only events associated with a provider, department, or vendor in my group (recommended).** For example, if a patient you have access to is admitted to the hospital, and the patient's PCP is in your group, you receive a notification even if the PCP isn't associated with the admission.
 - c. **Only events associated with me.**
 - d. **Only events associated with certain providers or departments.** 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.
 - b. **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.

View a Patient's Recent Events

Select the **Home** tab and hover over each type of event in the Event Monitor section to review recent events for your patients.

If necessary, you can view more information about events and mark them as Done in In Basket by clicking the name of the patient in the Patient column.

Open a Patient's Chart from an Event Message

Select the In Basket message for the patient's event and click  **Select Patient** to open the patient's chart.

Reviewing the Patient Chart

Review the Patient's Chart Before a Visit

1. Open the patient's chart, click **Chart Review**, and select a tab that includes information you want to review.
2. To view more detail, such as a specific patient visit, click the date link that appears in the row.
 - a. To view details on several rows at once, select the check boxes in those rows, and then click  **Start Review**.
3. To send a message to the patient's PCP regarding an office visit, click **Ask a Question**, fill out the message form, and click  **Send Message**.

Find Information Quickly in the Patient's Chart

For patients with large charts, you can enter text in the **Search Chart** field to quickly find the information you need. For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as lipid panel results and progress notes that mention cholesterol.

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 see only 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 then select the Billing Encounter filter.
3. Click  **Apply** to make the results of your search appear.

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

View Trending Data in Graph or Table Format in Chart Review

1. In Chart Review, select the check box for the data you want to view. For example, select specific visits or lab tests.
2. Select the type of flowsheet that you want to create.
 - a. Click  **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.
 - b. Click  **Lab Flowsheets** to graph lab result data.
3. Click and drag to select the table cells that contain data that you want to graph.
4. Click  **Line Graph** or  **Bar Graph** to create a graph of the selected data.

View a Patient's Trending Lab Results in Results Review

1. Select the **Patient tab** and click **Results Review**.
2. Select the date range for the results data you want to see and click  **Accept**.
3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left. Select the name of the component or component type that you want to view.
4. To view more columns of results, click:  **Load More**. To view all columns of a patient's results for the time range that you selected, click  **Load All**.

*Tip: 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.*

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 Patient's Allergies

1. Select the **Patient tab** and click **Allergies**.

*Tip: For more information about an allergy, select the allergy and click  **View History**.*

View a List of the Patient's Current Medical Problems

1. Select the **Patient tab** and click **Problem List**.

*Tip: For more information about a problem, click the **View Report** link.*

View a Patient's Current Medications

1. Select the **Patient tab** and click **Medications**.

*Tip: 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.

*Tip: For a high-level summary of the current patient's chart, select **SnapShot** from the Clinical Review menu.*

View a Patient's Demographics

Select the **Patient** tab and click **Demographics** to see a report with demographic information like the patient's address, PCP, 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 **Billing Info**. You can expand and collapse the sections in the Services section and use the **Jump to** search bar to find specific services.

You can also see details about a particular coverage on the Benefits Summary 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

Upload a File

You can attach a file to the patient's chart, such as an electronic copy of exam notes. The file is sent to an administrator at Middlesex Health who verifies it before it's added to the chart.

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 left side 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.
 - i. The maximum allowed file size appears in a message below the **Add file** button.
 - ii. 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 ✕.
5. If the Message for reviewer section appears, enter a message for the administrator who review files.
6. Click **Submit for Review**.

Ordering and 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. Click  **Preference List** to see a list of available orders.
3. Click **Referrals** and select the referral you want to order.
4. Click  **Accept Orders**.
5. In Order Entry, click the link for the referral to add information such as the associated diagnoses, attach any relevant files, and enter any comments. Click  **Accept** when you're finished.
6. Click  **Sign Orders**.
7. Enter your password if prompted and click  **Accept**.

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.
3. For more information about a referral, click the referral ID link to view a report.

Tip: You can't edit a referral that you've already created, but you can add additional notes or attachments to it and send a referral message.

View a List of Referrals for Specific Providers or Locations

1. Select the **Referral Search** tab.
2. Select either **Incoming** or **Outgoing** depending on whether you want to see referrals sent to your organization or referrals placed by your organization.
3. In the **Referred To** or **Referred By** section, select one or more providers or locations.
4. In the **Referral Status** section, select each referral status that you want to include in your search results.
5. If you selected **Outgoing** in step 2, select a scheduling status in the **Scheduling Status** section.
6. Enter dates in the **From** and **To** fields to limit your search to particular dates.
7. Click **Search**.
8. 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 Upcoming Appointments reports sort appointments by patients in a particular patient group, if applicable, and then by date and time.

View Upcoming Appointments for Your Patients

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 and click **Upcoming Appts - Patient**.
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. 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 pane. For example, you might see **CC'd Charts** or **Referral Authorization** 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.

View a Message

1. Select the folder for the type of message you want (for example, **Result Notifications**).
2. Select a message to read its contents.

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 In Basket**.

Print Multiple Message At Once

If you are working with a paper system, you can print multiple In Basket messages to keep on file. Note that you can print multiple messages at once only for certain message types.

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 the messages.

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 a number of 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 arrow next to  **New Msg**, and select the type of message you want to send.
2. In the **To** field, completion match on 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 Use **<patient name>** to pull in the patient's name, or 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 Message You've Sent

1. Select the **In Basket** tab and click **My Out Basket**.
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**.

In Basket: Responding to Service Requests

You might receive requests from Middlesex Health to provide services for a patient. Accept or decline these requests to let Middlesex Health know whether you can provide the requested service.

Respond to a Service Request

1. Open your **Service Requests** In Basket folder.
2. Review each message.
 - a. Click **Accept** or **Decline** depending on whether you can provide the requested service. If you decline, you're prompted to enter a reason for declining the request.
 - b. If you need more information before you make a decision, click **Reply** to send a message back to Middlesex Health.

In Basket: Triage Referrals

You can triage referrals that are sent to your organization to ensure that the correct people can act on them.

Triage a Referral

1. Open your **Referral Triage** In Basket folder.
2. Each message corresponds to a referral request. Select a message to view details about the request.
3. Click one of the following to triage the referral:
 - a.  **Accept**
 - b.  **Reject**
 - c.  **Redirect**
4. After you choose an option to triage the referral, document information about your decision. For example, you can select a reason for rejecting a referral, or redirect a referral to a specific location provider, department, or specialty. When you accept or reject a referral, the referring organization is notified of your decision and can see the information you documented.

Using SmartTools

SmartTools are templates and shortcuts that can help you document faster.

SmartTool	Use to pull in
SmartTexts	Templates of block of text
SmartPhrases	Templates or blocks of text that you can create
SmartLinks	Information from another part of the chart
SmartLists	A predefined list of choices

Tip: You can use SmartTools in many places throughout the web application, such as In Basket messages. If you see these buttons, the field is SmartTool-enabled:



Use SmartTexts

SmartTexts are standard templates or blocks of text used to write notes for routine visits or problems you treat often, such as diabetes.

- ❖ Click  to see a list of available SmartTexts.
- ❖ Double-click a SmartText to insert it.
- ❖ Press **F2** or use the   icons to complete any SmartLists and wildcards (***) in the SmartText.
 - A wildcard (***) is a placeholder. You can type over it with your own text or delete the placeholder.

Use SmartPhrases and SmartLinks

Use a SmartPhrase:

SmartPhrases allow you to type a few characters that automatically expand to a longer phrase, paragraph, or template. For example, typing ".me" enters your name.

- ❖ In a SmartTool-enabled field, enter a period (.) followed by the SmartPhrase's name. For example, enter ".me". As you type, a list of matching SmartPhrases and SmartLinks appears.
- ❖ Use the arrow keys to select the SmartPhrase you want to use and press Spacebar to insert it.
- ❖ Press **F2** or use the   icons to complete any SmartLists and wildcards (***) in the SmartPhrase.

Use a SmartLink:

SmartLinks help you write more quickly by pulling or "linking" information from the patient's chart directly into your documentation. SmartLinks often appear within SmartPhrases, but you can also use them on the fly. To pull one in, enter a period (.) followed by the SmartLink's name, as you do when using a SmartPhrase.

Browse Available SmartPhrase and SmartLinks:

- ❖ Click  on the SmartTool toolbar.
- ❖ Click any of the letters to see SmartPhrases and SmartLinks whose names start with that letter.

Use SmartLists

SmartLists are lists of common choices that help you quickly customize your documentation. For example, a symptoms SmartList might contain choices like wheezing and chest pain. SmartLists are used in SmartTexts and SmartPhrases and look something like this: {symptoms:406}.

- ❖ Press **F2** to jump to the next SmartList or wildcard (***) in your note. Some values in a SmartList might be selected by default. You can change them if needed.
- ❖ Click other values to select them.
 - A **yellow background** indicates that you can select only one value.
 - A **blue background** indicates that you can select one or more values.
- ❖ If you accidentally select a value, click again to clear it.
- ❖ To save your selections and move to the next SmartList or wildcard, right-click or press **Enter**.

Tips:

- ❖ *Use the mnemonic "left-click to pick, right-click to stick" to remember which mouse button to use when you're making selections.*
- ❖ *You can save time by documenting any abnormal values first and then applying any default values for the remaining SmartLists in one click. After selecting abnormal values, click  on the SmartTool toolbar to apply any available default values for the remaining SmartLists.*

Viewing Releases of Information

Use the Requests activity to view released portions of a patient's record. The data that you can view in the patient's chart is predetermined and is limited to the information that you need to accomplish your specific task.

Access Your Releases of Information

1. Select the **Requests** tab.
2. If there are too many requests, search using the **Requester, Requested From Date, or Requested To Date fields.**
3. Click the link for the information that you need to see.
4. To print your report, click .

*Tip: When the reports are something other than PDFs, you can select the check box next to each report you want to view and click  **View Selected Reports** to view multiple reports at the same time.*

Viewing Crystal Reports

From the My Reports activity, you can view standard reports with relevant analytical data so you can track and follow up on trends, such as First Access usage.

Access Your Crystal Reports

1. Select the **Reporting** tab and click **My Reports.**
2. Click the report's link to view the most recent version of the report. To view a previous version of the report, expand the Previous Copies section and select the date of an available report you'd like to view.
3. If there are no recent copies of a report, you can request the report from Middlesex Health.

Managing Your Clinic

Change a User's Password

1. Select the **Admin** tab and click **Manage My Clinic**.
2. On the **My Clinic** tab, select the user whose password you need to change and click  **Change User Password**.
3. In the **Your password** field, enter your password.
4. In the **New password** and **Re-enter new** fields, enter the new password for the user.
5. Click  **Accept**. The next time the user signs in using this password, she will be prompted to select a new password of her choice.

Verify User Records

You might receive a Site Verification message from your Middlesex Health asking you to verify that all users working at your site are current and active. From the message, you can click **Verify Now** and you are brought to the **Site Verification** tab in Manage My Clinic. From the **Site Verification** tab, you can verify that all the users working at your site are current and you can deactivate user records to prevent unauthorized access by users whose accounts are outdated.

- ❖ In the Active? column on the **Site Verification** tab, select No for all the users whose accounts you want to deactivate. You can enter a comment in the **Comments** field that appears.
- ❖ Select the **Acknowledgement** check box to acknowledge that you have reviewed and confirmed the list of users.
- ❖ Click  **Verify** to verify the list of users and close the screen.

Deactivate a User

1. Select the **Admin** tab and click **Manage My Clinic**.
2. On the **My Clinic** tab, select and deactivate the user.
3. Enter a comment indicating why you're deactivating the user and click **Deactivate**.

Request a New User in EpicCare Link

1. Select the **Admin** tab and click **Manage My Clinic**.
2. Select the **Requests** tab and 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.
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 letter.

Update Facility Contact Information

1. Select the **Admin** tab and click **Manage My Clinic**.
2. Select the **My Facilities** tab and click the name of a facility to update its contact information, including the phone number, fax number, and address.
3. After you've finished editing contact information, click **✓ Save**.

*Tip: If an active address isn't on file, you can search for a matching address by entering an address and clicking **Find Address**. Alternatively, click **Manual Entry** to enter all of the address information yourself.*

Updating Program Settings

You can use the EpicCare Link settings options to perform a variety of account maintenance tasks, including changing your password and setting the page that appears when you first log in. In addition, you can choose to receive email notifications at an external email address when you are granted access to a patient. You can set your preferences for these notifications, as well as specify the email address at which you'd like to receive them.

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

Change Your Password

1. Go to **Menu > Settings > Change Password**.
2. Enter your old password, then a new password, and then your new password again.
3. Click **✓ Accept**.

Set Up Your Email Preferences

1. Go to **Menu > Settings > User Demographics**.
2. In the User Information section, enter your email address, title, degree, languages, and specialties, if applicable. The fields that appear depend on your user role.
3. In the **Receive e-mail notifications** field, indicate whether you want to receive notifications for unread In Basket messages at your specified email address.
4. In the **Days between e-mails** field, enter the number of days you want to wait between notification emails.
5. In the **Receive notifications for group events** field:
 - a. Select **Yes** to receive email notifications about all patient events for the provider groups you belong to.
 - b. Select **No** to only receive email notifications about patients you specifically have access to.
6. Click **✓ Save**.

Change Your Default Login Page

1. Go to **Menu > Settings > Set Default Page**.
2. Go to the page that you want to set as your default page.
3. Click **Set Default Page** to set the current page as your default page.

Tip: To reset your default page to the system default, go to Set Default Page and click **Click here to clear your default page and use the system settings instead**.