Community User - Getting Started with EpicCare Link

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 West Tennessee Healthcare 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 includes information to help you get started, such as browser requirements and how to log in.

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

Help and contact information

For help using an activity, click 🔘.

- If you forget your password or can't log in, contact your Site Administrator.

If you need to submit a help desk request, your help desk support is likely going to ask you for key technical information. To get this information, go to **Settings** > **Session Information Report**.

Browser, system, and connection requirements

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

- Google Chrome 88 and any later versions
- Microsoft Edge version 88 or later
- Mozilla Firefox version 78 or later
- Safari version 14 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.

How do I log in?

1. Use the link provided by your organization to access EpicCare Link.
2. Enter the user ID and password that you received for EpicCare Link.
3. Enter your single-use passcode that you receive through your two-factor authentication method.
4. After you enter the passcode, optionally select the **Remember me** checkbox to indicate that you're using a device that's not shared with anyone else. This means you won't be asked for a passcode the next time you sign in from the same device for a while. Note that if you log in through a different device or browser, or your browser's settings are reset, you are still prompted for a passcode.

> Refer to [Choose an authentication method](#) for more information on single-use passcodes.

Choose an authentication method

Two-factor authentication (2FA) is a process by which you verify your identity through a single-use passcode before you can access your account. This extra layer of security helps ensure that you're the only person who can log in to your account, even if someone knows your username and password.

When you first log in with your username and password, you're prompted to choose how you'll receive these single-use passcodes.

1. Use the link provided by your organization to access EpicCare Link.
2. Enter the user ID and password that you received for EpicCare Link.
3. Choose how you want to receive 2FA passcodes. You can receive the passcodes through a mobile application, a text message, or email.

   - Mobile application requires you to have access to a smartphone with an application like Microsoft Authenticator or Google Authenticator installed. These applications are free on the Apple App Store and the Google Play Store, but standard data rates apply.
   - Text message requires you to have access to a cell phone with text messaging capabilities. Standard messaging rates apply.
   - Email requires you to access your email at the same time as having the EpicCare Link website open.

Extra Security Required

Choose how you want to receive passcodes that are required to access your Healthy Planet Link, EpicCare Link, and Tapestry Link account. This extra layer of security helps ensure that you're the only person who can log in to your account, even if someone knows your username and password.

Each time you try to log in, you receive a new passcode through your chosen method that you need to enter to finish logging in. Each code can be used only one time.

Choose Your Authentication Method

Mobile App   Text Message   Email

Cancel

	Refer to the appropriate section below for detailed steps about using each 2FA authentication method: • Set up mobile application 2FA • Set up text message 2FA • Set up email 2FA

Set up mobile application 2FA

1. Install an authentication app, such as Microsoft Authenticator or Google Authenticator, on your smartphone if you don't already have one. You can find these apps on the Apple App Store and Google Play Store.
2. Open the authentication app and scan the QR code that appears on the EpicCare Link screen after you choose Mobile App as your 2FA authentication method. If you can't scan the code, enter the alphanumeric code that appears below the QR code.
3. Click ➡ **Next**.
4. Enter the code that appears in the authentication app and click ➡ **Verify**.

> ℹ️ The authentication app shows a code, along with the remaining time that the code is valid. The app frequently generates a new code, so if only a few seconds remain to use the code that's on your screen, wait until a new code appears.

5. Write down the reset code that appears on the screen and keep it private. You can use this reset code if you need to change how you receive passcodes. For example, if you get a new smartphone, you can use the reset code to set up your new phone to receive passcodes.

6. Click **I wrote down the reset code**, then click ✅ **Finish**. Going forward, you'll enter the passcodes generated by your authentication app to log in to EpicCare Link.

> ❗ A new passcode is generated each time you log in. Enter this code to complete the login process.
>
> Unlike passcodes, the reset code appears only one time after you set up your authentication method. Use this reset code only if you need to change how you receive passcodes.

Set up text message 2FA

1. Enter your phone number in the indicated field.
2. Click ➡️ **Next**.
3. Enter the passcode that was sent to your phone. Note that it might take a minute or two for the passcode to be sent. If you wait several minutes and still don't receive a passcode, click **Re-send Code**.

4. Click ➡ **Verify**.
5. Write down the reset code that appears on the screen and keep it private. You can use this reset code if you need to change how you receive passcodes. For example, if you get a new phone number, you can use the reset code to set up your new phone number to receive passcodes.
6. Click **I wrote down the reset code**, then click ✅ **Finish**. Going forward, you'll enter the passcodes you receive via text messages to log in to EpicCare Link.
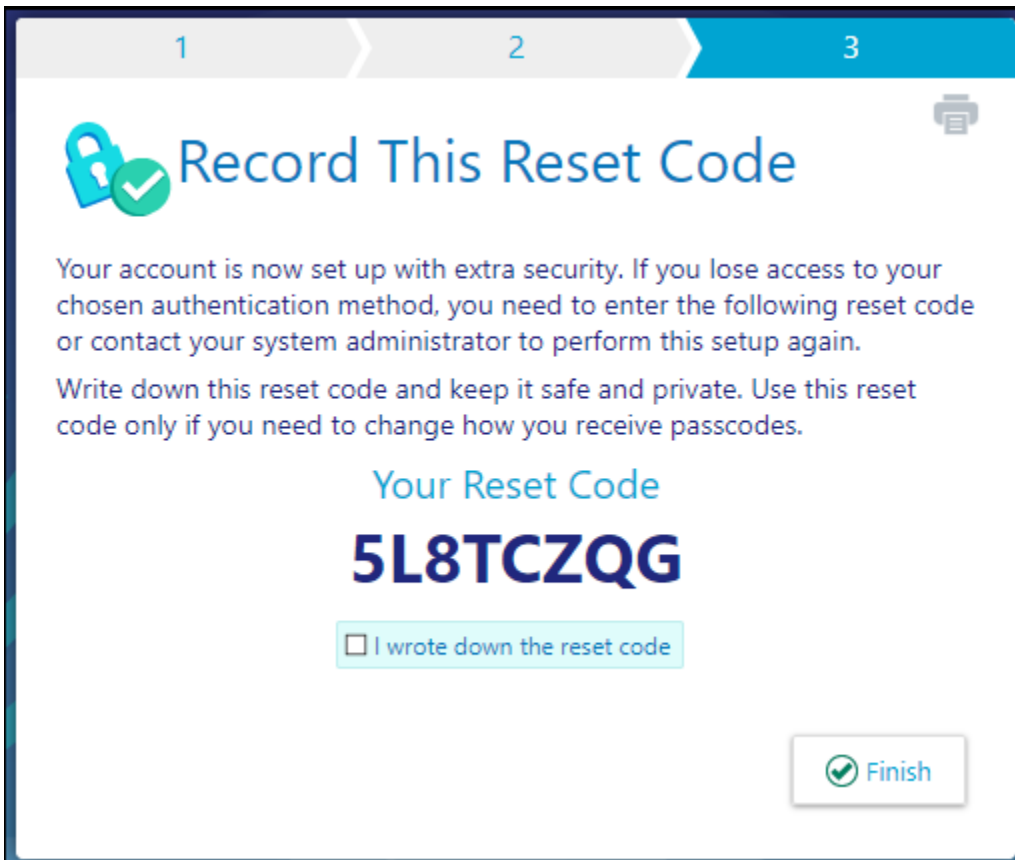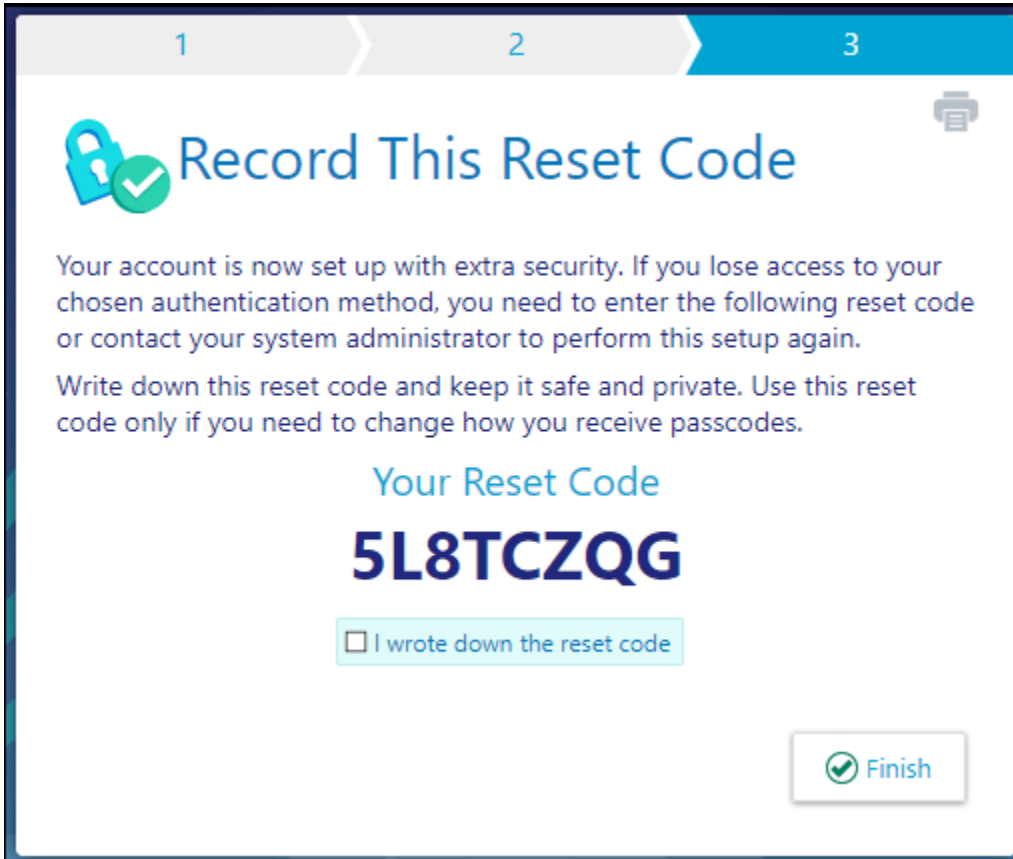

!	A new passcode is sent to you each time you log in. Enter this code to complete the login process.
	Unlike passcodes, the reset code appears only once after you set up your authentication method. Use this reset code only if you need to change how you receive passcodes.

Set up email 2FA

1. Enter your email address in the indicated field.
2. Click ➡ **Next**.
3. Enter the passcode that was emailed to you. Note that it might take a minute or two for the passcode to be sent. If you wait several minutes and still don't receive a passcode, click **Re-send Code**.
4. Click ➡ **Verify**.

5. Write down the reset code that appears on the screen and keep it private. You can use this reset code if you need to change how you receive passcodes. For example, if you get a new email address you can use the reset code to set up your email to receive passcodes.

6. Click **I wrote down the reset code**, then click ✅ **Finish**. Going forward, you'll enter the passcodes you receive via email to log in to EpicCare Link.

> ❗ A new passcode is sent to you each time you log in. Enter this code to complete the login process.
>
> Unlike passcodes, the reset code appears only once after you set up your authentication method. Use this reset code only if you need to change how you receive passcodes.

Reset your authentication method

You can reset your authentication method. For example, you might change the phone number at which you receive passcodes.

1. On the login screen, Enter the user ID and password that you received for EpicCare Link.
2. Click **reset additional authentication**.
3. Enter the single-use reset code you were given when you originally set up your authentication method.
4. Click 🔧 **Reset**.

!	If you lost the single-use reset code, contact your system administrator.

| 📄	Refer to Choose an authentication method for two-factor authentication for more information on setting up a new authentication method.

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.
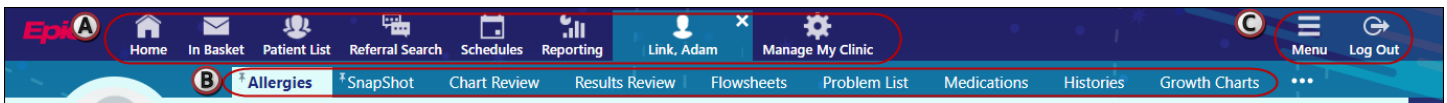

How do I log out?

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.

Using Happy Together Link

With Happy Together Link, you can add Link accounts you might have with other organizations for reviewing patient information. From the Happy Together Link page, you can switch from one account to another without having to enter your login information again. You can also see when there are unread messages for each account so you know whether there are any updates you need to review.
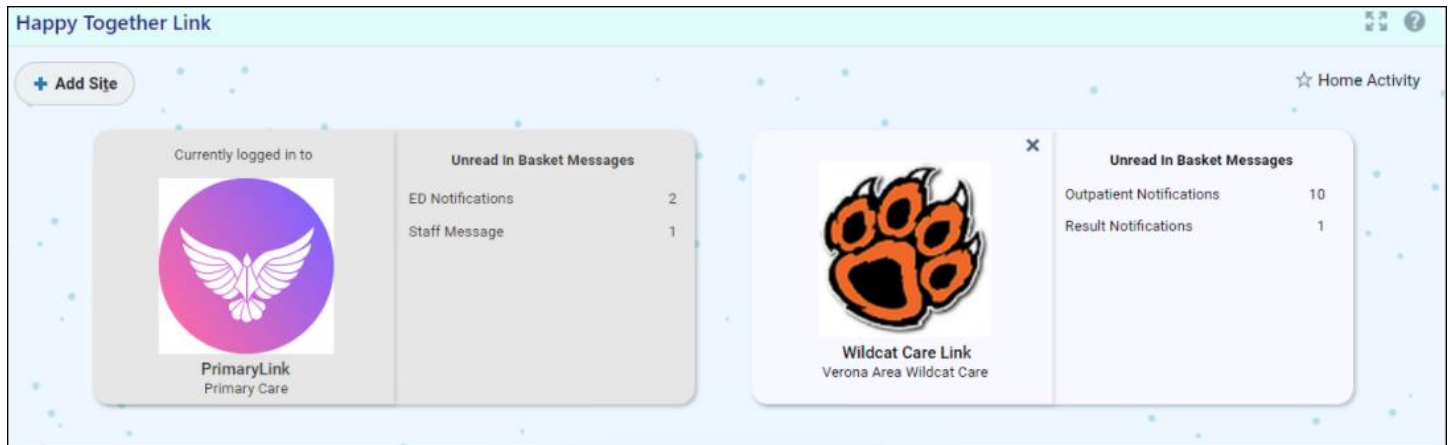
Add an account

To add a Link account to the Happy Together Link page:

1. Click ➕ **Add Site**.
2. Search for the account by the organization, site name, or postal code.
3. Select the site from the search results.
4. In the new window that opens, enter your account credentials for the site.

After you add an account to the Happy Together Link page, click it to jump to that account from your current account.

Remove an account

To remove an account from the Happy Together Link page:

1. Click the ✖ icon on the site's card.
2. After verifying that you want to remove the account, click **Accept**.

Make Happy Together Link your default page

You can make Happy Together Link your default page so it appears right away when you log in to EpicCare Link.

To make Happy Together Link your default page, click ☆ **Home Activity** in the top-right corner of the page.

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.

> **ⓘ** 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 > My Demographics**.
2. Enter your email address, title, degree, languages, and specialties, if applicable. The fields that appear depend on your user role.
3. Click **Receive e-mail notifications** if 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. 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. Click ✔ **Accept**.

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.

> **ⓘ** 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**.

Set up notifications

You can receive text or email notifications when you receive specific types of In Basket messages. For example, you might want to receive a text when you have a new In Basket message about a patient being discharged from the hospital.

1. Go to **Menu > Settings > Notification Preferences**.
2. Select the email and text check boxes depending on the type of notifications you want to receive for each type of message.
3. Enter the email address that you want to receive the email notifications.
4. Enter the phone number that you want to receive the text messages.
5. Click ✔ **Accept**.