EpicCare Link
Account Access Manager
Guide

EpicCare Link Access Management Guide

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What is EpicCare Link and how do I use it?

EpicCare Link is a view-only portal for organizations that have an affiliated relationship with Bon Secours Mercy Health and any of its subsidiaries.
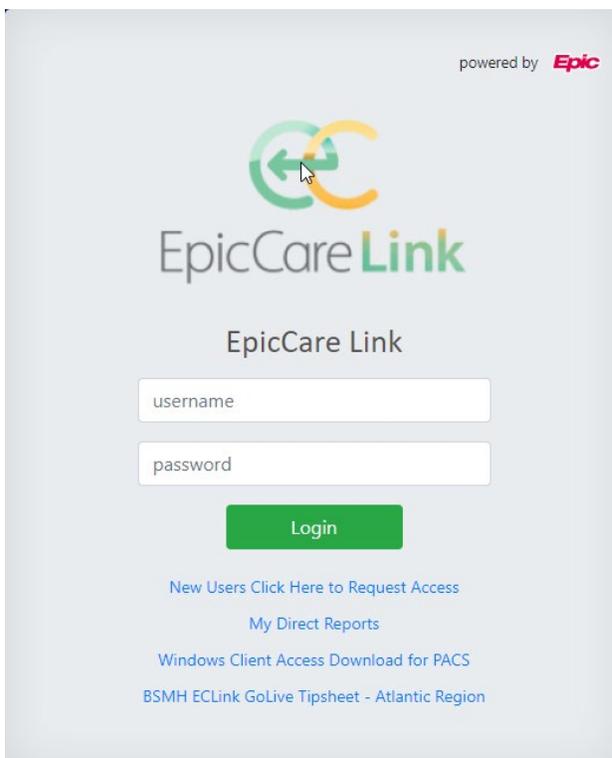
What is an Account Access Manager and what are their responsibilities?

An Account Access Manager can create/setup new users under their Direct Reports, enabling the users to access the Bon Secours Mercy Health EpicCare Link application.

1. Request a new non-employee account (network login) be created for your staff members.
   a. Selecting the [correct role](#) will automatically request access to EpicCare Link.
2. Accounts will be created with an expiration date no further than 6 months in the future.
3. The Account Access Manager will receive up to 5 expiration notification emails whenever one of their staff's accounts is about to expire.
   a. First notification is sent one month prior to the expiration date. Subsequent emails continue weekly to help ensure access is not lost without warning. The last notification is sent the day prior to the expiration date.
   b. If no action is taken by the Account Access Manager to extend their staff's expiration, access will be put on pause (unusable) for 90 days. If an account remains in a "paused" status for 90 days, it is deleted.
   c. During the 90 day "paused" period the Account Managers can extend an expiration date for up to 180 days in the future. This will permit staff to access their account again.
4. Immediately terminate any staff member that no longer requires access.

How do I request access for EpicCare Link for a new location?

1. If you are a new location (facility has never used EpicCare Link)
   i. Go to EpicCare Link weblink https://carelink.health-partners.org.
2. Click the link "New Users Click Here to Request Access"

3. Click on "EpicCare Link New Location Setup Process"
   a. The page that displays is depicted in part on the next page:

EpicCare Link

EpicCare Link for all New Location Setup Process

This process is meant to be utilized by Bon Secours Mercy Health (BSMH) Affiliated Partners in order to request their Organization to be setup with EpicCare Link access. This access provides authorized affiliated users the ability to access patient's clinical data including pertinent medical records, patient history, demographics, and images for treatment purposes as well as the ability to communicate with BSMH staff in order to provide quality patient care.

Established Locations will then utilize the Standard BSMH Account Management Processes for establishing and maintaining their staff's access to EpicCare Link.

- You can validate your location setup along with who your Account Manager and BSMH Liaison is here:

BSMH EpicCare Link access can be provided to a wide range of affiliated users that assist in providing care and other support functions to BSMH patients.

- Serviceable (allowed) locations include but are not limited to:
  - Medical offices
  - Skilled Nursing Facilities
  - Assisted\Independent Living Facilities
  - Long Term Acute Care Hospitals (LTACH)
  - Home Health Facilities
  - Rehab Facilities
  - Hospice Facilities
  - Lab Facilities
  - Imaging Facilities
- Non-Serviceable (not allowed) locations include but are not limited to:
  - Pharmaceutical Companies
  - Medical Sales Companies
  - Durable Medical Equipment(DME) Companies
  - Non-Affiliated Personal Users
  - Ambulance Companies

In order to have your Organization establish on BSMH EpicCare Link please have a person of authority from your Organization that will be responsible for the Account Management of your staff fill out the form below for review. Once received a BSMH EpicCare Link Liaison will be in contact with you to review the submission and discuss next steps. For details of what the responsibilities of the Organization Account Manager are or to help evaluate if you are the correct individual from your company to become the Account

Start New Location Application

   b. After reading and understanding who can request EpicCare Link, click the "Start New Location Application" button at the bottom of the page.
   c. The Account Access Manager for the organization needs to click the link to download the "Security Agreement" (personal agreement).
      a. Upload the signed document at the end of the sign-up process.
   d. Use the green navigation buttons (<<Previous or Next>>) at the bottom of the window and fill in the required fields. The system will prompt you if you miss a field.
      a. The last screen of the application also has the required security agreement for download, completion (either electronically, or printed, filled in, and scanned) and then placing in the box marked "Drop files here".)
   e. Your EpicCare Link Liaison will notify you when your account is ready with your login and password.
   a. Note: The full process may take 2-3 weeks to complete.

3

f. For a new Physician Practice location, the EpicCare Link Liaison will send the **BSMH System Access Agreement to the new Account Access Manager**.

    a. This agreement requires a signature from an executive of the organization.

g. The signed **BSMH System Access Agreement** document must be returned to the EpicCare Link Liaison, who will have it processed.

How do I get access for others at my location as the new Account Access Manager?

Once you have received information from your EpicCare Link liaison:

First Login – Change password

    i. Password Change site: https://BSMHADFS.health-partners.org/adfs/portal/updatepassword/

    ii. Can be used remotely without 2 Factor Authentication

    iii. Must Prefix usernames with Domain (ADS\ or MDCO\)

   iv. Must know the current password to utilize this site to reset the password.
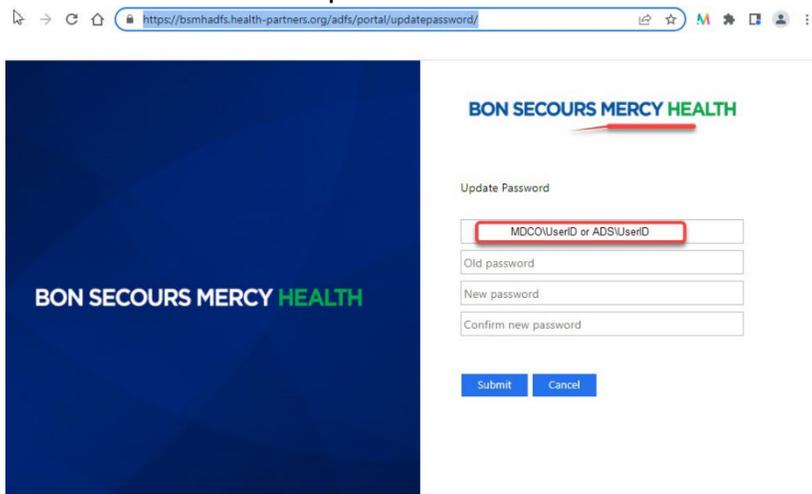
    v.

2. You will be prompted to change your password
   - a. New password requirements per Cybersecurity:
     - i. Must not repeat any of your previous 4 passwords
     - ii. Must meet at least 12 characters
     - iii. Must have at least 3 of the following Character Group Requirements:
     - iv. Must contain at least 1 uppercase letter
     - v. Must contain at least 1 lowercase letter
     - vi. Must contain at least 1 digit
     - vii. Must contain at least 1 special character
   - b. Must not contain your username

3. Register for 2 Factor Authentication (2FA) which is required to access "My Direct Reports"
   - i. See Symantec VIP 2 Factor Authentication in the Appendix

4. Once your new password is established and you are registered for Symantec VIP 2FA, go to https://CareLink.health-partners.org and click "My Direct Reports"
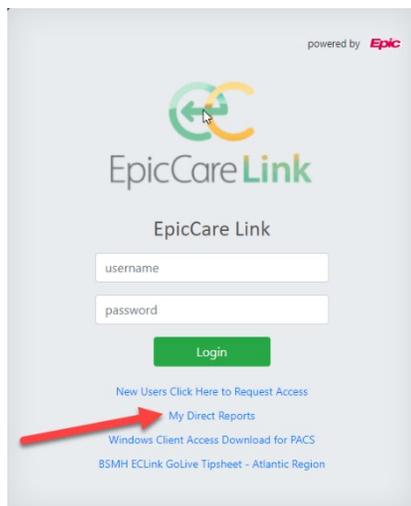

a. Login by entering MDCO\your username or ADS\your username in the Username box and your password in the Password box. You will be prompted for your security code from Symantec VIP
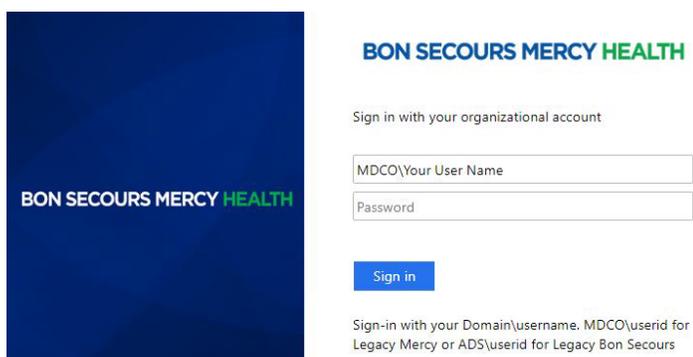
Creating and Requesting Access for your Users

The "Request Home" is the default view displaying various tile options on the right
 FYI: *Depending on the level of security assigned to your account, other menu items and tiles may display.*
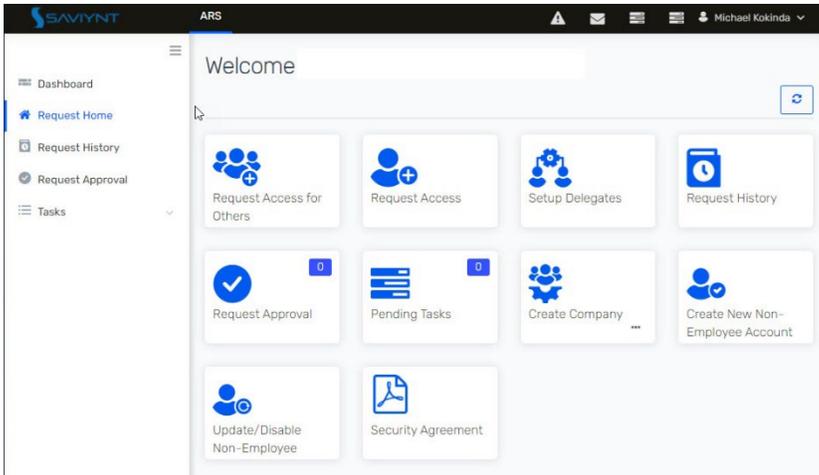
Create a New Non-Employee Account

1. Have your new user complete a "Confidentiality and Security Agreement"
    a. Click the Security Agreement button shown; and save a copy for your new user.
    b. Have your new user complete the agreement and save it so you can upload it.
    c. You will upload the signed agreement in step 3 of this process.
2. Click the tile for Create New Non-Employee Account
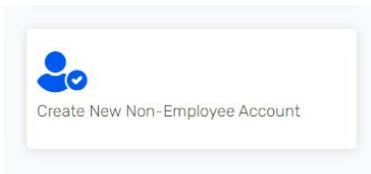
3. (Refer to the image below) Fill in all the boxes that have a red asterisk *.
    a. Make sure to select your market first (refer to this list to determine your market), then the appropriate NonEmp-EpicCareLinkAccessONLY role. Select your company from the list. Change the signed security agreement dropdown to say "Yes". Click the "Click here to attach file" to attach the signed security agreement from your user.

Create User

First Name *

Last Name *

Middle Initial

Last 4 SSN *

Expiration Date (Max 180 Days) *

Email

Work Phone

Mobile Phone

Market *
CHPO

Role *
NDIV-CHPO-NonEmp-EpicCareLinkAccessONLY

Job Title *

Company *
Select

Manager (if other than self) (Direct Report Managers and Delegator Managers Only)
Select

Have you attached a signed security agreement below? (Form available on the IT Services Portal under "Order Access") *
Yes

Attachments ⓘ *
⊕ Click here to attach file

b. Click the submit button at the bottom right of the screen.
   i. Requesting the correct EpicCareLinkAccessOnly for your market, will complete all items required. <u>See the appendix for a full list of the roles by market</u>.
   ii. When submitting requests please select the appropriate Market. The ONLY role that you should be selecting is EpicCare LinkAccessONLY. If you pick a different role the application requests will not be generated.
c. Retain the <u>Request Number</u> for reference.

User Request

⌂ Admin > Request Home > User Request

✔ Congratulations!
Your Request has been submitted

| User Name	Request Number	Action
	19028846	👁 View Sending to Compass Status

d. You will receive an email from "AccountsAndAccess@BSMHealth.org" notifying you the AD account has been created (can take up to 7 business days).
   i. There will be a separate email with the initial password for the new user.
      1. Pre-existing users will not get a new initial password. They will need to have their old password changed.
   ii. There will be a separate email that confirms that HPF OneContent access has been created (if required).
   iii. There will be a separate email the confirms that EpicCare Link access has been created.
   iv. The email address that sends confirmation is "<u>IT Service Desk bsmhealth@service-now.com</u>" when the access requests are complete.
e. **It is recommended to NOT share the new login with your user until all requests are complete (EpicCare Link and OneContent if OneContent is required)**

Managing User Accounts

Extending Access

1. Non-employee accounts require extensions at a minimum every 180 days.
   a. Register for 2 Factor Authentication which is required to access "My Direct Reports"
      i. See Symantec 2 Factor Authentication in the Appendix
   b. Access "My Direct Reports" as described earlier.
   c. Click the "Update User Tile
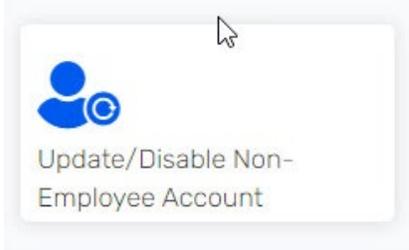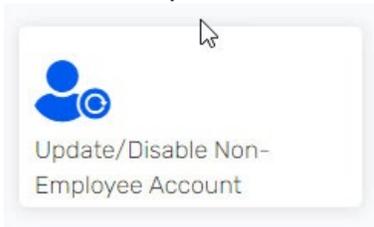

   d. Search or select your direct report.
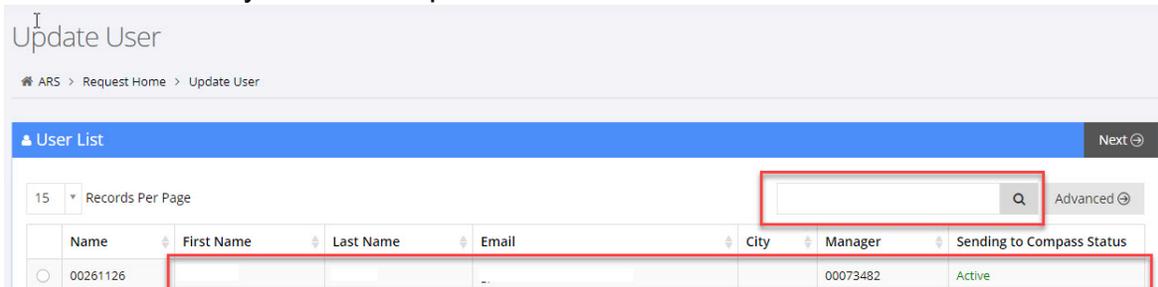
   e. The Update User Form will load. Information given when your user was created will be populated in the various form fields. Select the calendar icon and extend your user to the desired date (maximum of 180 days). Click the submit button.

Disabling Accounts

1. **When an associate leaves your organization, it is extremely important that you disable their account to BSMH resources.**
   a. Access "My Direct Reports" as described earlier.
   b. Click the "Update User Tile

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c. Search or select your direct report.

2. The Update User Form will load. Information given when your user was created will be populated in the various form fields. Click the dropdown for "Disable User" and select the "Disable" option.
3. The Update User form refreshes to show the "You must select 0 to Disable" drop down. Click the drop down and select 0, then click the submit button.

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Appendix

Correct Roles by Market when creating new users:

BSHSI: Greenville Market: St. Francis Hospitals (Downtown and Eastside)

   EpicCare Link Role: ATL-Greenville- NonEmp-EpicCare-LinkAccessONLY

CHPO: Lorain Market including Mercy Lorain and Mercy Allen Hospitals

   EpicCare Link Role: NDIV-CHPO-NonEmp-EpicCare-LinkAccessONLY

CMHP: Springfield Market including Mercy Springfield and Urbana Hospitals

   EpicCare Link Role: CDIV-CMH-NonEmp-EpicCare-LinkAccessONLY

HMHP: Youngstown Market: St. Elizabeth Hospitals (Youngstown and Boardman) and St. Joseph's Hospital

   EDIV-HMP-NonEmp-EpicCare-LinkAccessONLY

KYIN: Kentucky Market including Lourdes

   SDIV-KYIN-Paducah-NonEmp-EpicCare-LinkAccessONLY

KYIN: Kentucky Market including Marcum and Wallace Hospital

   SDIV-KYIN-MWM-NonEmp-EpicCare-LinkAccessONLY

MHPN: Toledo Market including St. Anne, St. Charles, St. Vincent, Defiance and Willard Hospitals

   NDIV-MHP-NonEmp-EpicCare-LinkAccessONLY

RSFH: Roper St. Francis Hospital Associated Physician Practices

   EpicCare Link Role: ATL-RSFH- NonEmp-EpicCare-LinkAccessONLY

SWOH: Cincinnati Market including Anderson, Fairfield, Clermont, Jewish and West Hospitals

   CDIV-SWO-NonEmp-EpicCare-LinkAccessONLY

WCOH: Lima Market including St Rita's Hospital

   NDIV-WCO-NonEmp-EpicCare-LinkAccessONLY

Delegate for Access Management

1. A Delegate is a representative from a site utilizing EpicCare Link that can perform the duties of the Account Access Manager when necessary. *It is very important to understand that a delegate for an access manager must have account management permissions. It is also very important if a delegate creates a new non-employee account, they select the primary account access manager during the*
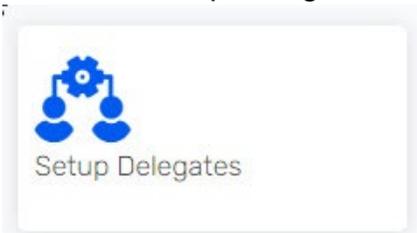

Manager (if other than self) (Direct Report Managers and Delegator Managers Only)

| Select | Should use primary account MGR name here | ▼ |

process. *See step 5 for requesting account management for your delegate.*

   a. Access "My Direct Reports" as described earlier.

2. Click the "Setup Delegates" Tile

3. The Delegates form loads. To create a Delegate for yourself, select the "Action" dropdown and click "Create Delegate".
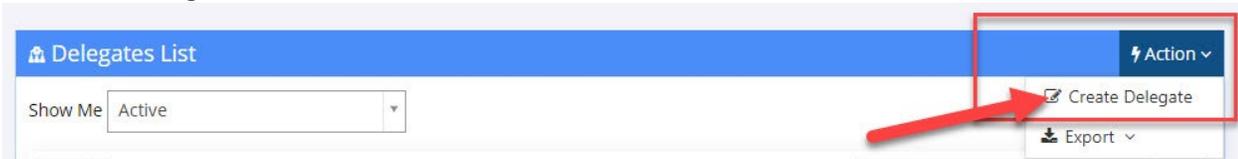
4. The "Create Delegate" form loads. The example below demonstrates Michael selecting Elizabeth as a delegate for the period of January 14th to January 31st. Use a time period that makes sense for your organization.
   a. The "Parent User" is you, click "Select User" to search for your account.
   b. The "Delegate User" is the associate at your facility that will be able to perform access manager functions when necessary. Click "Select User" to search for the associate's account.
   c. Once both users are selected, click "Create".
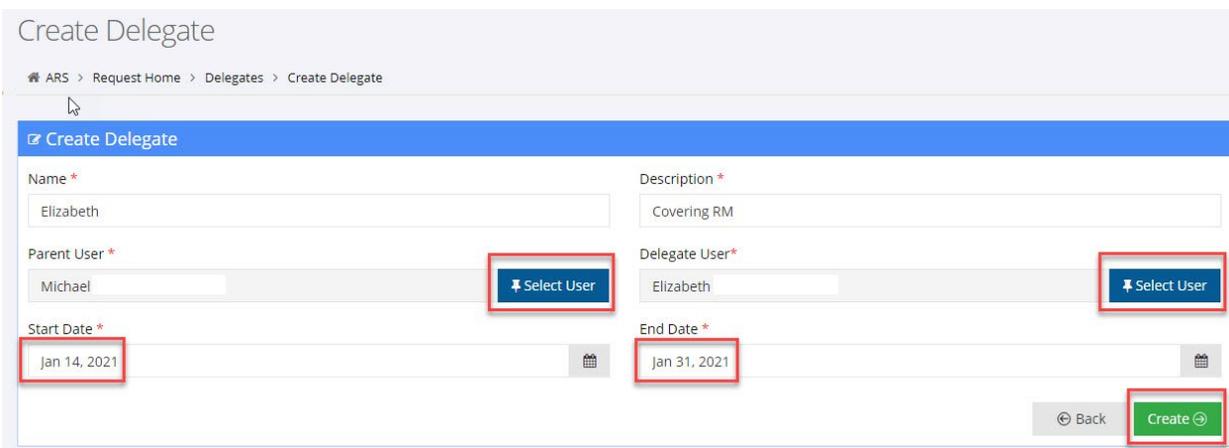
5. Account management. This tool is ONLY required for the Account Access Manager for your site and your delegate. Do not request this for any other user at your site.
   a. Access "My Direct Reports" as described earlier.
   b. Select the "Request Access for Others" as described earlier.
      i. Proceed to step "c" when you have your user selected.

c. In the **Search** field type "Account Management" and click "Add to Cart".
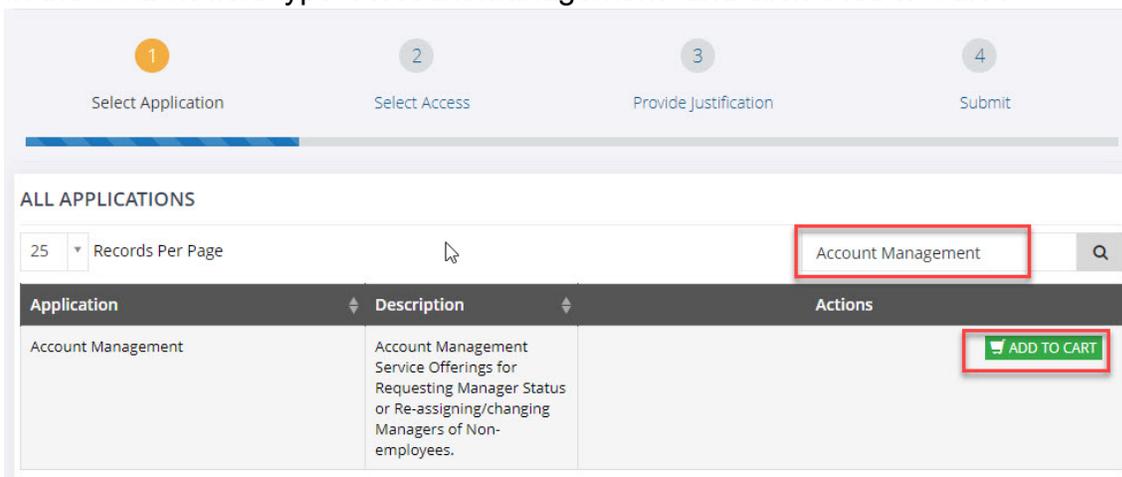
d. The Select Application form will refresh adding account management to the cart. Click "Checkout".
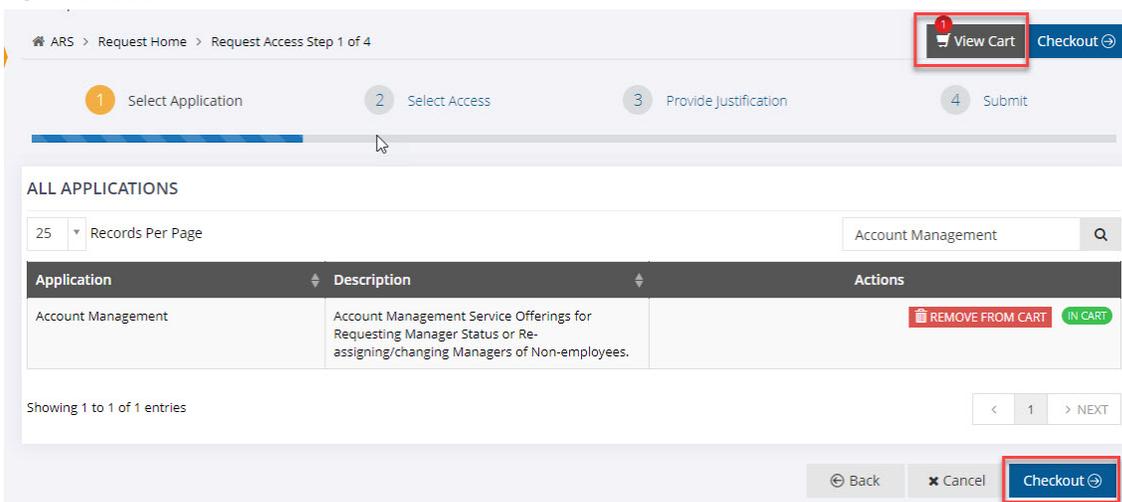
e. The Account Management Form will load. Click the dropdown for "Account Manager Setup" and select EpicCare Link from the list. Lower in the form, click the "+ADD" button next to "Request Account Manager Status". Then click "Next"

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f. The form will refresh and show "Request Account Manager Status" in the right-hand pane.

g. The Account Management form loads with fields for Business Justification or Comments if needed. Click "Submit" to complete the request.

h. The screen will refresh with the congratulations screen and your delegate should be able to perform the following activities:

    i. Request a New Non-Employee

      ii.   Order Access
     iii.   Approve Access
     iv.   Update a Non-Employee
      v.   Disable a Non-Employee

Frequently Asked Questions:

1. How do I request access for EpicCare Link for a pre-existing location?
   - If you are already the Account Access Manager for this location, please go to the section "How do I get access for others at my location as the new Account Access Manager?"
   - If you are a staff member, please ask your Account Access Manager to submit the requests on your behalf. If you do not know who your Account Access Manager is, please email your EpicCare Link Liaison for your region.   To email your EpicCare Link Liaison see this table.
2. Our Account manager left how do we create a new account manager?
   - If your Account Access Manager is no longer at your location, please identify an Account Access Manager and email your EpicCare Link Liaison for your region. To email your EpicCare Link Liaison see this table.
3. Are you already a EpicCare Link user but work for a different facility now?
   - At your new location please ask your Account Access Manager to submit the requests on your behalf. If you do not know who your Account Access Manager is, please email your EpicCare Link Liaison for your region.   To email your EpicCare Link Liaison see this table.
   - If your new location is not set up to See this part of the Guide
4. I have a staff member that has left how do I terminate them?
   - Please refer to "Disabling Accounts."
5. I am an Account Access Manager and my account access expired what do I do?
   - Email your EpicCare Link Liaison for your region. To email your EpicCare Link Liaison see this table.
   - The Account Access Manager can also contact the Service Desk at 1-833-MY1HELP
6. I have requested access, but my staff is unable to login.
   - If your Account Access Manager confirmed that all requests for access have been completed and you still cannot log into EpicCare Link please contact the Service Desk 1-833-MY1HELP
7. I can't get into My Direct Reports what do I do?
   - Please refer to "How do I get access for others at my location as the new Account Access Manager?" and remember to put **MDCO**\ or **ADS**\ in front of your username depending on your account.
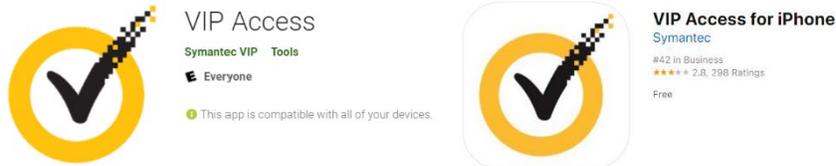
Glossary:

1. EpicCare Link Liaison
   a. The BSMH associate that manages access for EpicCare Link account access managers or in some cases individual EpicCare Link users. Each BSMH market has one or more EpicCare Link Liaisons.
2. Account Access Manager
   a. The Account Access Manager is the representative for a site utilizing EpicCare Link that creates and manages users for that site.
3. OneContent (HPF)
   a. OneContent is the former document imaging and storage platform for paper items scanned for a hospital encounter at Legacy Mercy Health sites. BSHSI EpicCare Link sites will not get this tool.
4. BSMH: Bon Secours Bon Secours Mercy Health
5. Domain:
   a. MDCO is the domain for Legacy Mercy
   b. ADS is the domain for Legacy Bon Secours
6. Delegate
   a. A Delegate is a representative from a site utilizing EpicCare Link that can perform the duties of the Account Access Manager when necessary.

Symantec VIP Self Service Setup Guide for Smart Devices

Download the VIP Access app.

1. From your smart device, visit the app store (Google Play or Apple's App Store) and download VIP Access by Symantec.

VIP Access
Symantec VIP   Tools
Everyone
ℹ This app is compatible with all of your devices.

VIP Access for iPhone
Symantec
#42 in Business
★★★★★ 2.8, 298 Ratings
Free

Register your Device

1. From a web browser, go to the Self Service Portal at https://sspidp.bshsi.org:8233/vipssp/ and enter your BonSecours Bon Secours Mercy Health **username and password** to login. *Note: This is the same username and password used for email, Connect Care, Epic, EpicCare Link, and CCLink.*

2. Confirm your identify by selecting **Email address** and clicking **Continue**. This will send a temporary password to youremail.

https://sspidp.ads.bshsi.com:8233/vipssp/

Welcome to the Symantec... ✕

Symantec. | VIP SELF SERVICE PORTAL

Welcome to the Symantec® VIP Self Service Portal
To access the Self Service Portal, enter your user name and password, and click **Sign In**.

Sign In	
User Name	DALT513
Password	••••••••••••••••••••••••

Sign In

Symantec. | VIP SELF SERVICE PORTAL

To Complete Your Sign-in
Request a temporary security code to help confirm your identity.

Confirm Your Identity
How would you like to receive your security code?

◉ Email Address: Ch*********@bshsi.org
◯ Voice Call: 180*****19

Cancel   Continue

3. Check your email for an email from VIP Self Service. This email will contain your temporary VIP security code in theform of a **six-digit number**.

4. In the web browser, enter your temporary **six-digit number** in the **Security Code** box and click **Sign In**.

Tue 12/30/2014 10:32 AM

VIP Self Service <noreply@symantec.com>

Your temporary VIP security code

To

Retention Policy   90 day delete - Junk Email (90 days)   Expires   3/

Links and other functionality have been disabled in this message. To turn on that functionality, move this mes
The Outlook Junk Email filter marked this message as spam.

Dear

Here is your temporary VIP security code:

000000

This security code can be used once and is valid until 3:31 PM GMT, Dec 31, 2014.

If you have any questions or need further assistance, contact your organization's administrator.

Thank you,
VIP Self Service

Symantec. | VIP SELF SERVICE PORTAL

A temporary security code has been sent to Ch*********@bshsi.org.

To Complete Your Sign-in

Help us confirm your identity so we can complete your sign-in. Request a temporary security code and enter it on the next page.

Confirm Your Identity

Security Code:

Back   Sign In

5. Click Register to register your smart device.

Select Your Credential

Select the type of credential you want to register.

VIP Credential

Use a VIP mobile application or VIP security credential to securely access your organization's services.

REGISTER

6. Enter a **Credential Name** of your choice. On your smart device, you will see **CREDENTIAL ID** and **SECURITY CODE**. On your computer, enter this information in the **Credential ID** and **Security Code** boxes,

and click **Submit**.

a. If the user had a previous BSMH account, they may end up in a queue that will require extra attention by BSMH teams to create their account. The notification will come from this email address if that is the case. (Note that if your new user's account is not created within 7 business days, their request likely has fallen into this queue and will take longer to create).

b. Notifications that your users accounts will expire also come from this email address.

2. AccountsAndAccess@BSMHealth.org

a. If the user never had access to BSMH resources, the notification of the new account will come from this email address.

3. IT Service Desk bsmhealth@service-now.com

a. When application (EpicCare Link) access is created and the work is complete a notification will come from this email address.

4. Do NOT send email to any of these addresses. They are used for auto-notifications and are not monitored for incoming mail.

EpicCare Link Liaisons' Email addresses

EpicCare Link Liaisons Email		
Market	Physician Offices	Post-Acute
Cincinnati	CincinnatiCareLink@mercy.com	CincinnatiLTCCareLink@mercy.com
Greenville	GVL-SCEpicCarelink@bshi.org	GVL-SCEpicCarelink@bshi.org
Lima	LimaCareLink@mercy.com	LimaCareLink@mercy.com
Lorain	LorainCareLink@mercy.com	LorainCareLink@mercy.com
Charleston SC	epiccarelink@rsfh.com	
Springfield	SpringfieldCareLink@mercy.com	SpringfieldCareLink@mercy.com
Toledo	ToledoCareLink@mercy.com	ToledoCareLink@mercy.com
Youngstown	YoungstownCareLink@mercy.com	YoungstownCMCareLink@mercy.com
Irvine KY	MWCareLink@mercy.com	MWCareLink@mercy.com
Paducah KY	LourdesCareLink@mercy.com	LourdesCareLink@mercy.com

[Market List (as seen when requesting a new account)](#)

- BSHSI – (All Legacy Bon Secours Markets)
- CHPO – Lorain Ohio
- CMHP – Springfield Ohio
- CORP – Do Not Use
- HMHP – Youngstown Ohio
- KYIN – Paducah Kentucky
- MDCO – Do Not Use
- MHPN – Toledo Ohio
- RSFH – Charleston South Carolina
- SWOH – Cincinnati Ohio
- WCOH – Lima Ohio