

EpicCare Link Community User Quick Start Guide


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 [Frimley Health NHS Foundation Trust](#) to provide quality patient care.

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, email fhft.epiccarelink@nhs.net.

Browser, system, and connection requirements

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

- Google Chrome 50 and any later versions
- Microsoft Edge version 79 or later
- Microsoft Internet Explorer 11

You must also use the Windows or Macintosh operating system. Chromebooks are not supported.

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. Open your web browser and go to <https://epiccarelink.fhft.nhs.uk/>
2. Enter the user ID and password that you received for EpicCare Link.
3. Enter your single-use passcode.

Set up an authentication method


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

You can receive the passcodes through a mobile application, a text message, or email. Each time you try to log in, you receive a passcode through your chosen method that you need to enter to finish logging in. Each passcode can be used only one time.

After you enter the passcode, you can select the Remember me check box to indicate that you're using a device that's not shared with anyone else. This means that you won't be asked for a passcode the next time you sign in from the same device for a period of time. 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.

Enter Your Passcode

Use the code sent to your email address no...@epic.com.

Remember me 

LOG IN

Cancel

Having trouble?

[Re-send the code](#) or [reset additional authentication](#)

Record your reset code

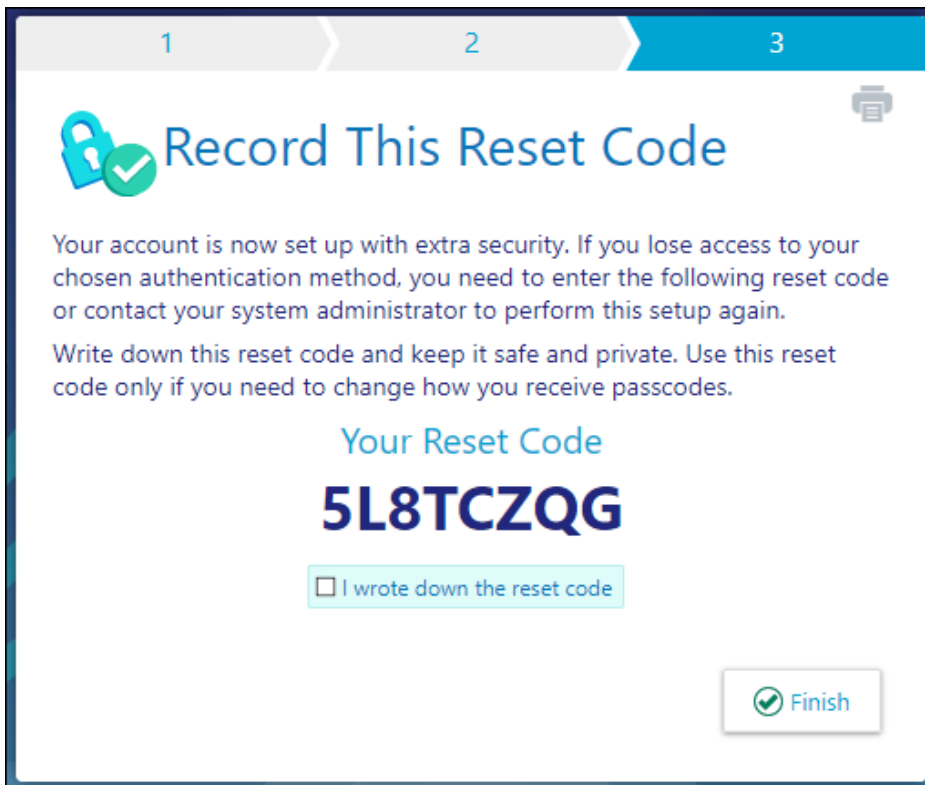
When you set up an authentication method, the system gives you a reset code to use if you need to change how you receive passcodes. For example, if you get a new smartphone you can use the reset code to set up your new phone to receive passcodes.

Write down the reset code that appears on the screen and keep it private. You need to enter the reset code from the login screen if you need to change your authentication method. Note that you can also use this code to change your authentication method from the Settings menu after you log in.



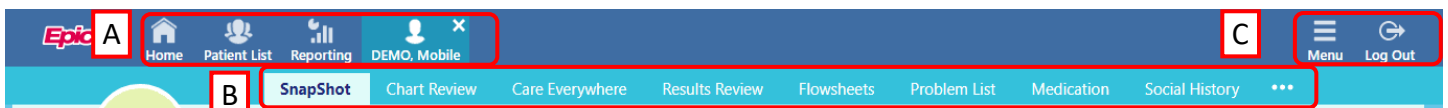
A new passcode is sent to you each time you log in. Enter this code to complete the login process.

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.



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.

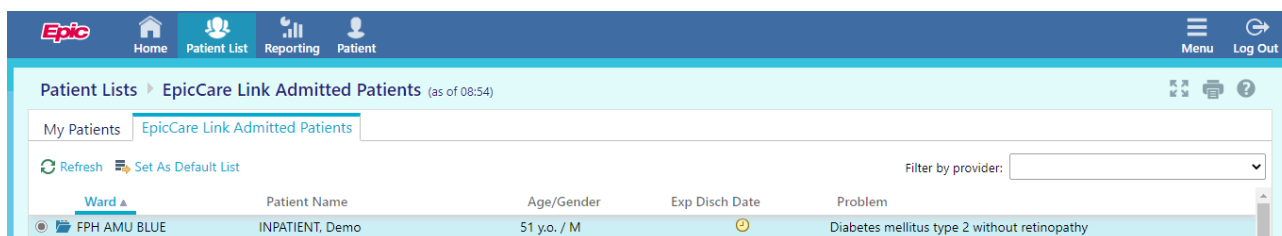
Accessing the Patient Chart

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 their 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 clinician relationship of GP or form part of the patient's primary or secondary care team.




Ward	Patient Name	Age/Gender	Exp Disch Date	Problem
FPH AMU BLUE	INPATIENT, Demo	51 y.o. / M		Diabetes mellitus type 2 without retinopathy

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.



To see only the patients for whom you are the GP, select your name in the Filter by provider field.

Search for a patient's record based on name or MRN

Click  Patient and enter the patient's name, date of birth and postcode or MRN.

In the Search Results window, click the name of the patient whose chart you want to open.



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 their chart yet, or they 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 full name, DOB, Sex and NHS number when using this method.

If your initial search returns no results, click Search All Patients from the Search Results window.

Complete all of the required fields (If the patient does not have an NHS number you can enter 0000 0000 0000, and then click Search.

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.

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.

Date	AMB/CAM/IP	Medication	Order Detail	Provider	Refills	End Date
17/02/2022	IP	morotocog alfa (REFACTO AF) injection 1,000 Int'1 Units	1,000 Int'1 Units Once	Isaac INPATIENT, MD		
17/02/2022	IP	inFLIXimab (ZESSLY) 250 mg in sodium chloride 0.9% 500 mL infusion	3 mg/kg Once	Isaac INPATIENT, MD		
17/02/2022	IP	inFLIXimab (REMSIMA) 250 mg in sodium chloride 0.9% 500 mL infusion	3 mg/kg Once	Isaac INPATIENT, MD		

2. To view more detail, such as a specific patient visit, click the date link that appears in the row.

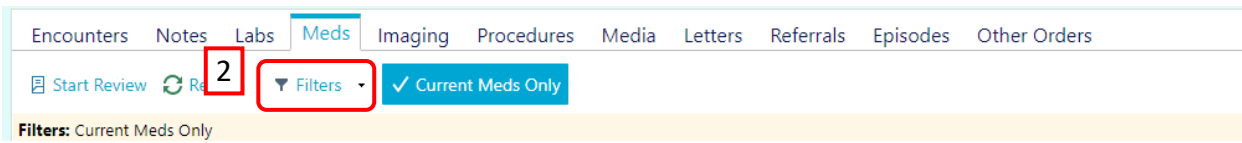
Find information quickly in the patient's chart

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 clinic 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 clinicians.

1. In Chart Review, select a tab.



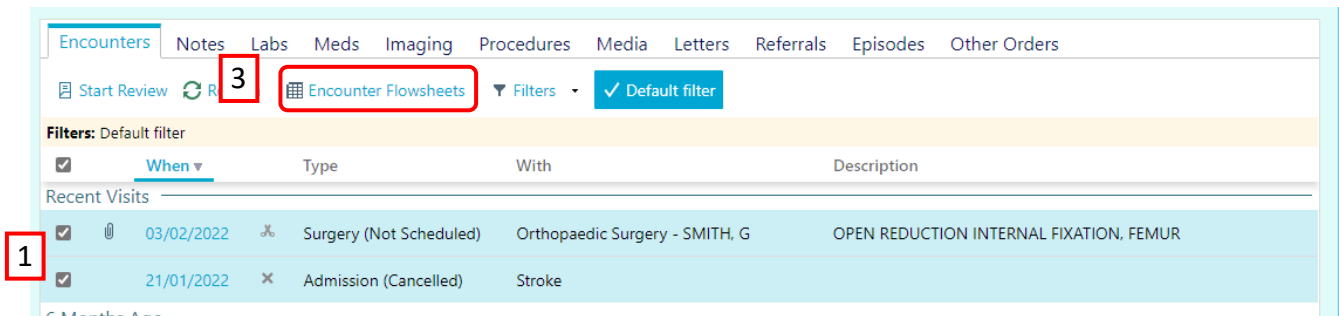
2. Click ▼ Filters and select a filter type. Then, select check boxes next to the values that you want to see. For example, select Encounter Type, and then select MDT Meeting.
3. Click ✓ Apply to make the results of your search appear.



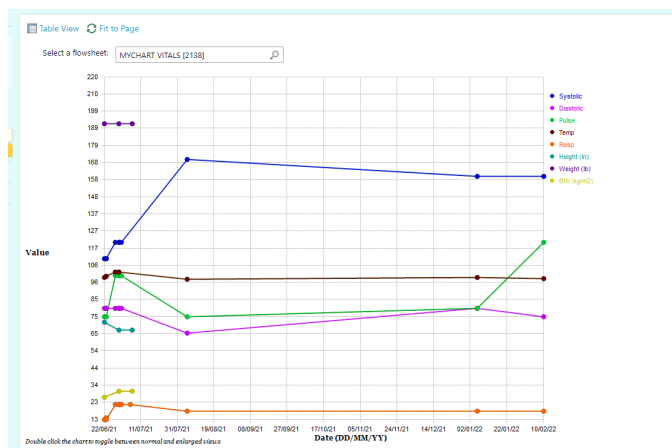
To remove the search criteria and begin a new search, click Clear All Filters.

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.



3. Click Encounter Flowsheets to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.
4. You can also trend data in the Labs tab by clicking Lab Flowsheets.
5. Click and drag to select the table cells that contain data that you want to graph.
6. Click Line Graph or Bar Graph to create a graph of the selected data.



View a patient's trending lab results in Results Review

Be advised – Only FHFT results will be available to view via EpicCare Link

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 Laboratory Results, 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.

The screenshot shows the 'Results Review' interface. At the top, there are navigation options: 'Hide Tree', 'Show Ref Rng', 'Load All', 'Load More', 'Time Mark', 'Refresh', 'Legend', and 'Options'. Below this, there are dropdown menus for 'View: New Results View' and 'New results (No time mark set)', along with a 'Use Date Range Wizard' button. On the left, a tree view shows 'ALL TOPICS' expanded to 'Results', with sub-items 'LABORATORY RESULTS', 'CARDIOLOGY', and 'OTHERS'. The main table displays results for five dates: 22/06/2021 12:22, 22/06/2021 12:31, 11/10/2021 16:21, 26/01/2022 10:08, and 18/02/2022 10:05. The table includes sections for 'CHEM PROFILE' (Albumin level, AST, ALT (SGPT), GGT) and 'OTHER CHEM' (Bilirubin Conjugated, FBC, Auto WBC, RBC).

	5 22/06/2021 12:22	4 22/06/2021 12:31	3 11/10/2021 16:21	2 26/01/2022 10:08	1 18/02/2022 10:05
CHEM PROFILE					
Albumin level		4			
AST		26			
ALT (SGPT)		25			
GGT		50			
OTHER CHEM					
Bilirubin Conjugated		0.25			
FBC					
Auto WBC	7.0		5.0		
RBC			6.00		



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.

Customise 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 list of the patient's current medical problems

Select the Patient tab and click Problem List.



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

View a patient's current medications

Select the Patient tab and click Medication.



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.



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, GP, emergency contacts, and more.

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.

5. 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.
 - c. The maximum allowed file size appears in a message below the Add file button.
 - d. To see which types of files you can add, hover over .
6. Enter a description of the file.
7. If you want to remove a file that you selected, click .
8. Click Attach To Patient's Chart.

Using SmartTools

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

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






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



Use SmartTexts



SmartTexts are standard templates or blocks of text used to write notes.

0. Click  to see a list of available SmartTexts.
1. Double-click a SmartText to insert it.
2. Press F2 or use the   icons to complete any SmartLists and wildcards (***) in the SmartText.
 - a. 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.

1. 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.
2. Use the arrow keys to select the SmartPhrase you want to use and press Spacebar to insert it.
3. Press F2 or use the   icons to complete any SmartLists and wildcards (***) in the SmartPhrase.
 - a. A wildcard (***) is a placeholder. You can type over it with your own text or delete the placeholder.

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 SmartPhrases and SmartLinks

4. Click  on the SmartTool toolbar.
5. 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 customise 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}.


1. 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.
2. Click other values to select them.

- a. A yellow background indicates that you can select only one value.
 - b. A blue background indicates that you can select one or more values.
3. If you accidentally select a value, click again to clear it.
 4. To save your selections and move to the next SmartList or wildcard, right-click or press Enter.




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.

Managing Your Clinic (Site Admin Only)

Change a user's password


1. Select the Admin tab and click My Groups.
2. 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, they will be prompted to select a new password of her choice.


Verify users

You might receive a Site Verification message from your Epic organization asking you to verify that all users working at your site are current and active. These users might include clinicians who don't log in to the web application. From the message, you can click Verify Now and you are brought to the Site Verification tab in My Facilities. From the Site Verification tab, you can verify that all the users and providers working at your site are current and you can deactivate users as needed to prevent unauthorised access by users whose accounts are outdated.


1. 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.

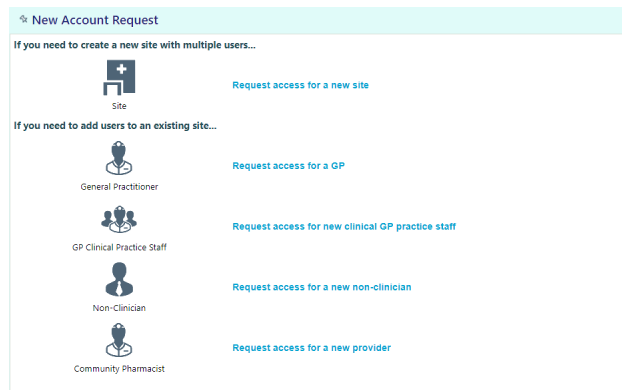
2. Select the Acknowledgement check box to acknowledge that you have reviewed and confirmed the list of users.
3. Click  Verify to verify the list of users and close the screen.


Deactivate a user

1. Select the Admin tab and click My Groups.
2. On the My Groups tab, select  to 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 Account Requests.
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 GP at your site, click Request access for a GP.




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.



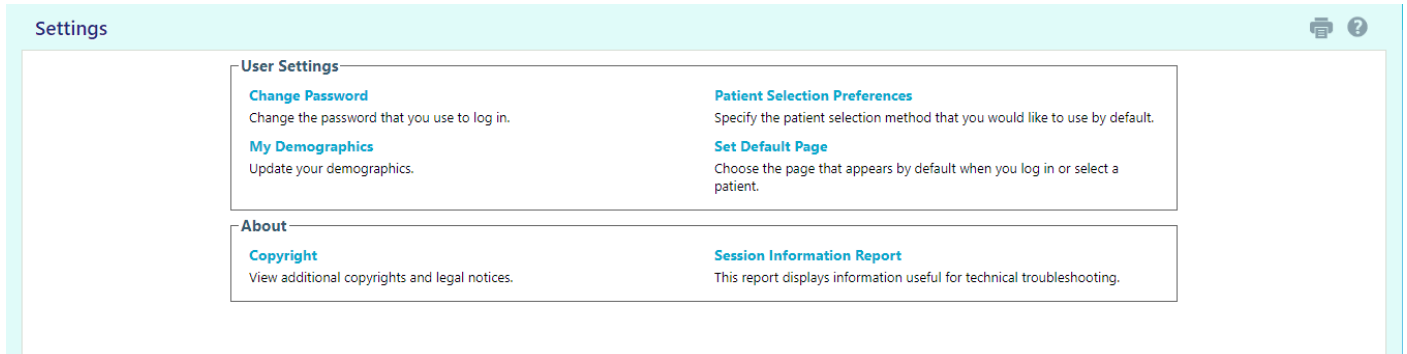
You can see the status of user requests that have been submitted in the Status column on the Requests tab.

Update facility contact information

1. Select the Admin tab and click My Facilities.
2. Within the My Facilities tab you can click the name of a facility to update its contact information, including the phone number, and address.
3. After you've finished editing contact information, click  Accept.


Updating your 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.




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 > My Demographics.
2. Enter your email address, title, degree, languages, and specialties, if applicable. The fields that appear depend on your user role.
3. In the Days between e-mails field, enter the number of days you want to wait between notification emails.
4. Click Receive notifications for group events if you want to receive email notifications about all patient events for the provider groups you belong to.
5. 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.](#)

© 2020 Epic Systems Corporation. All rights reserved. PROPRIETARY INFORMATION - This item and its contents may not be accessed, used, modified, reproduced, performed, displayed, distributed or disclosed unless and only to the extent expressly authorised by an agreement with Epic. This item is a Commercial Item, as that term is defined at 48 C.F.R. Sec. 2.101. It contains trade secrets and commercial information that are confidential, privileged and exempt from disclosure under the Freedom of Information Act and prohibited from disclosure under the Trade Secrets Act. After Visit Summary, Analyst, App Orchard, ASAP, Beacon, Beaker, BedTime, Bones, Break-the-Glass, Buggy, Caboodle, Cadence, Canto, Care Everywhere, Charge Router, Chronicles, Clarity, Cogito ergo sum, Cohort, Colleague, Comfort, Community Connect, Cosmos, Cupid, Epic, EpicCare, EpicCare Link, Epicenter, Epic Earth, EpicLink, EpicWeb, Garden Plot, Good Better Best, Grand Central, Haiku, Happy Together, Healthy Planet, Hyperspace, Kaleidoscope, Kit, Limerick, Lucy, Lumens, MyChart, OpTime, OutReach, Patients Like Mine, Phoenix, Powered by Epic, Prelude, Radar, Radiant, Resolute, Revenue Guardian, Rover, Share Everywhere, SmartForms, Sonnet, Stork, System Pulse, Tapestry, Trove, Welcome, Willow, Wisdom, With the Patient at Heart, and WorldWise are registered trademarks, trademarks, or service marks of Epic Systems Corporation in the United States of America and/or other countries. Other company, product, and service names referenced herein may be trademarks or service marks of their respective owners. Patents Notice: www.epic.com/patents.