

Berkshire HealthCare EpicCare Link Site Administrator Guide

1 Contents Page

1	Contents Page	1
1.1	Browser, system, and connection requirements.....	1
1.2	Version Control	1
2	Introduction	2
2.1	Governance	2
3	Berkshire EpicCare Link Users	2
4	EpicCare Link User Account Requests	2
4.1	Link Trust View Only Non-Clinician Account Request	3
4.2	Link Trust View Only Clinician Staff Account Request.....	4
4.3	Reviewing Status of User’s Accounts.....	5
4.4	Finding a User’s ‘Username’	5
4.5	Resetting Passwords	6
4.6	Deactivating a User.....	7
4.7	Inactive Users	7
4.8	Update Facility Contact Information	7
4.9	New Berkshire Site/Location Information	7
5	Information For EpicCare Link Users	8
5.1	Change your Password.....	9
5.2	Changing your Demographics.....	9
5.3	Change your Default Login Page	9
5.4	User Resetting their Password.....	9
5.5	Setting up the 2-Factor Authentication	9
5.6	Completing the 2-Factor Authentication Process	11

1.1 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.

1.2 Version Control

Berkshire Site Administrators will also be provided with a copy of this guide to support them in their role. When this Site Administrator guide is updated, this will be communicated to Site Administrators.

If there are any questions a Site Administrator has which is not listed in this guide, they can email their question to: fhft.epiccarelink@nhs.net

2 Introduction

EpicCare Link is a read only version of Frimley Health NHS Foundation Trust Electronic Patient Record – Epic and is being made available to its partner organisations.

2.1 Governance

All organisations who are provided access to EpicCare Link, they will need to sign an Information Sharing Agreement.

Each organisation must nominate at least 1 Site Administrator who will be responsible for requesting accounts for staff within their organisation, verifying the accounts and resetting staff passwords.

A Site Administrator will be asked to sign a Site Administrator Agreement, as well as provide evidence of valid IG training (dated within last 12 months).

Once the above governance process has been completed, Site Administrators will be able to request accounts for their organisation’s staff following the process below:

3 Berkshire EpicCare Link Users

For Berkshire Healthcare, there are 3 different roles which can be selected:

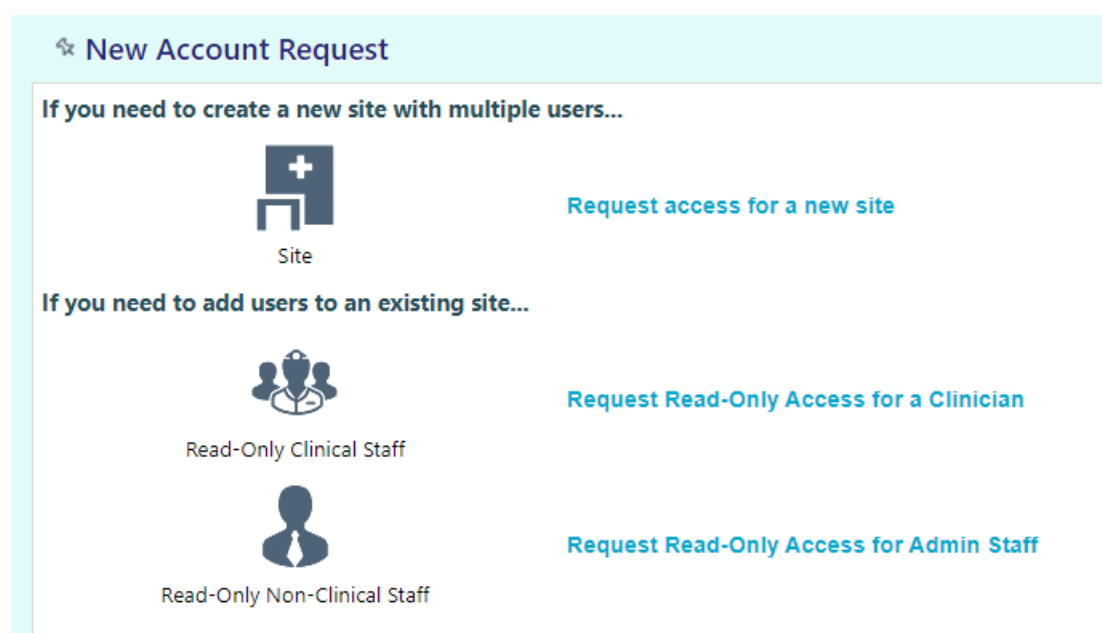
- Link Trust View Only Clinician
- Link Trust View Only Non-Clinician
- Link Site Admin

The Trust has produced a Guide for EpicCare Link users which can be located at: <https://www.fhft.nhs.uk/gps/gp-centre/epic-epr-at-frimley-health/>

4 EpicCare Link User Account Requests

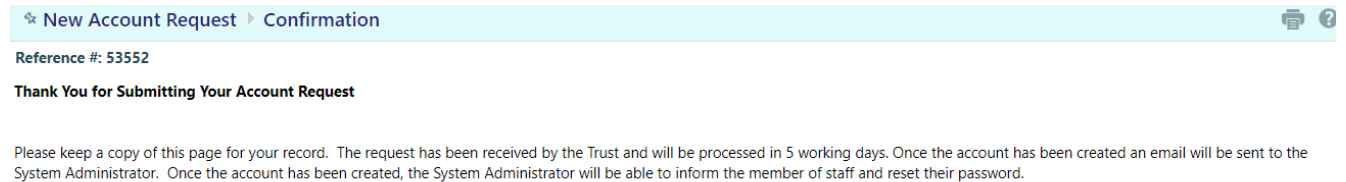
A site administrator needs to log onto EpicCare Link: <https://epiccarelink.fhft.nhs.uk/>

Click on the tab “Account Requests” and select the applicable link for the account which is required. **Note:** If the wrong template is completed, the request will be declined and the organisation will be asked to resubmit the request on the correct template.



Note: The work base of the member of staff must be provided, as well as the full job title for the member of staff. If the member of staff is a clinician, their professional registration number needs to be submitted in the form. If this information is not provided, the request will not be processed. If the site is not named/available, please email fhft.epiccarelink@nhs.net to request that the site is added to the list.

Once the request has been submitted, a confirmation message will be sent:



The request is received in the “Link Administrator InBasket”. The InBasket messages are checked by the Frimley Health EpicCare Link Department every day.

Any queries, relating to the submitted request, will be sent back to the Site Administrators to be resolved. Whilst these are being resolved, the request will be placed on hold.

Service Level Agreement (SLA): There is a 5-day SLA to process requested accounts.

4.1 Link Trust View Only Non-Clinician Account Request

If the non-clinical role is going to be a Site Administrator, please tick the box, if they are not going to be, ignore this box and submit the request.

My Groups My Facilities **Account Requests**

✦ New Account Request > BHFT Non-Clinical Staff

User Address:

Address:

Town/City:

County:

Country:

Postcode:

FHFT Employment Status

Do you currently work for FHFT in any capacity?

If yes please specify your contract status

Additional Details, e.g. job title, assignment number (if known) etc.

Job Title

Please enter your job title

Other

Comments:

Site Administrator

A site administrator is the person responsible for maintaining a site's records. These responsibilities include verifying that user accounts are current, deactivating the accounts of users who are no longer active at the site, and submitting requests to activate new user accounts. Every site must have at least one administrator.

Make this user a site administrator

Once the request has been submitted, a confirmation message will be sent:

Reference #: 53552

Thank You for Submitting Your Account Request

Please keep a copy of this page for your record. The request has been received by the Trust and will be processed in 5 working days. Once the account has been created an email will be sent to the System Administrator. Once the account has been created, the System Administrator will be able to inform the member of staff and reset their password.

The request is received in the “Link Administrator InBasket”. The InBasket messages are checked by the EpicCare Link Team daily and will be logged and processed.

4.2 Link Trust View Only Clinician Staff Account Request

▶ **BHFT Clinical Staff**

User Information

🚫 Name [Surname,Forename]:

Site Information

🚫 User group:

Basic Information

🚫 Work e-mail: Work phone:

User Address: [Copy site address](#)

🚫 Address:

🚫 Town/City:

County:

🚫 Country:

🚫 Postcode:

[Address Search](#)

Associated Providers: List the providers this user works with

⚠️ Provider name: [Add](#)

BHFT site

🚫 BHFT site [Comment](#)

FHFT Employment Status

🚫 Do you currently work for FHFT in any capacity?

If yes please specify your contract status [Comment](#)

Additional Details, e.g. job title, assignment number (if known) etc. [Comment](#)

Note: In relation to the information which is accessible to staff, this is the same regardless of the account which has been requested.

Once the request has been submitted, a confirmation message will be sent:

Reference #: 53552

Thank You for Submitting Your Account Request

Please keep a copy of this page for your record. The request has been received by the Trust and will be processed in 5 working days. Once the account has been created an email will be sent to the System Administrator. Once the account has been created, the System Administrator will be able to inform the member of staff and reset their password.

The request is received in the “Link Administrator InBasket”. The InBasket messages are checked by the EpicCare Link Team daily.

Once the Rio Support Helpdesk have submitted a request, an email will be sent from Rio Support to the EpicCare Link email address. This email must provide the name of the user account, the Inbasket Reference number and Rio Support’s own unique reference number, e.g., #751587, to enable the email to be linked to their request. Without this information, when the EpicCare Link Team respond/reply back to the Rio Support ServiceDesk request, they are unable to connect to their original request.

Any queries, relating to the submitted request, will be sent back to the Site Administrators to be resolved. Whilst these are being resolved, the request will be placed on hold.

The EpicCare Link Team will process the request; once the account has been created, EpicCare Link Team will respond to the Rio Support email confirming the account has been created with confirmation of the ‘username’, so that the Rio Support call is updated. Upon the call being updated, the Rio Support Team will then set the user’s password and email this information to the user, enabling them to log onto EpicCare Link.

4.3 Reviewing Status of User’s Accounts

A Site Administrator can check the status of requested accounts, to do this:

- Click on “My Group”
- Search for the user

Where the account request has not been approved, it will show as “Pending”.

Name	Status	Request Date	Email	Phone	Reference #
Goldman, Becca	Pending	14/6/22	becca@epic.com		47552
smith, mary	Pending	6/9/22	mary.smith@nhs.net		53293

When the account has been approved, it will show as “Record Generation Completed”.

Once the account generation has been completed, the Site Administrator is able to send the user their account details and set their password. To set a user’s password, follow the instructions below.

Note: Where a user has a dual account, this information will be communicated to the Rio Support.

Note: Site Administrators can only see the requests they have created, they cannot see the accounts/requests completed by other Site Administrators in their organisation. Therefore, if there is a query on whether an account has been requested, Berkshire Site Administrators need to check their own support desk logs to find the requests and email communications.

4.4 Finding a User’s ‘Username’




When reviewing the list of accounts, the Login column displays the user’s login details.

Name	Login ID	Provider	Email	Enrolled In 2FA	La
EPICCARE LINK, Site Administrator	LINKSITEADMIN	No		No	25/8/2022 14:45
HEALTHY PLANET LINK, Care Coordinator	LINKCC	No		No	30/5/2022 17:25
SURGEON, Sidney, MD	(No Access)	Yes		No	

Note: The list of users on the My Groups tab will only show the approved users, it will not show user accounts which have been requested but not approved, or declined requests.

4.5 Resetting Passwords

An organisation's Site Administrator is able to reset a user password, to do this, go to the tab "My Group". The users can be sorted alphabetically, there is no way to search for a user.

Name	Login ID	Provider	Email	Enrolled In 2FA	Last Login	Actions
EPICCARE LINK, Site Administrator	LINKSITEADMIN	No		No	25/8/2022 14:45	<div style="border: 1px solid red; padding: 2px;">  </div>
HEALTHY PLANET LINK, Care Coordinator	LINKCC	No		No	30/5/2022 17:25	<div style="border: 1px solid red; padding: 2px;">  </div>
SURGEON, Sidney, MD	(No Access)	Yes		No		<div style="border: 1px solid red; padding: 2px;">  </div>

Click on the Key icon, and it will display:

Change Password for EPICCARE LINK, GRACIE ✕


You cannot enter a blank password.

New Password ! Verify New Password !

Password Change Reason !

Password for EPICCARE LINK, SITE ADMINIS... !

Enter a new password for the user and verify the new password as well as enter the reason for changing the password. The password is case sensitive and must be at least 12 characters. Then enter your administrator password.

Click  Accept. The next time the user signs in using this password, they will be prompted to select a new password of their choice.

Change Password

! Your password has expired. Please update it.

Change Password

! Old password:

! New password:

! Re-enter new:

A password construction needs to be 12 characters.


Note: Where a user has an Epic account, they are classed as having a 'Dual Account'; their login details/password remains the same (regardless of whether logging into Epic or EpicCare Link. Any issues with the password, the user will need to request that these are reset by the Frimley Health IT Service Desk (Site Administrators cannot reset passwords for Dual Accounts). This is identified by the Administrator as the password reset button is 'greyed out' as shown below:

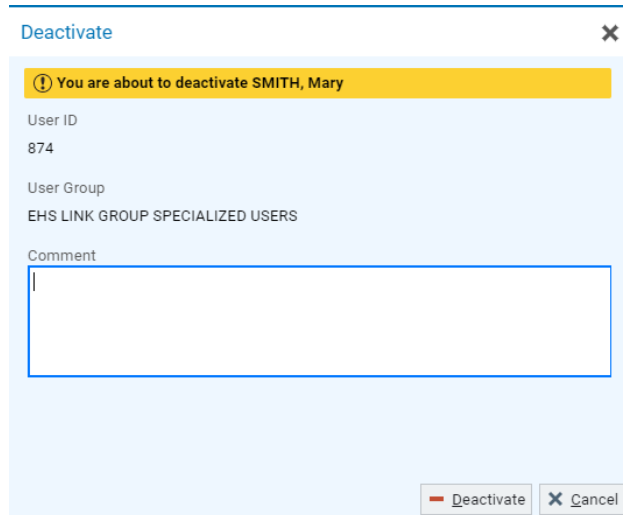


The telephone number of the Frimley IT Service desk is: 01276 602468.

4.6 Deactivating a User

Select the Admin tab and click My Groups.

On the My Groups tab, select  to deactivate the user, the following screenshot will appear:



Enter a comment indicating why you're deactivating the user and click Deactivate.


4.7 Inactive Users

Where a user's account has not been verified, or has not been used in 90 days, the account will be automatically disabled. To have the account re-enabled, an email needs to be sent by the Site Administrator to fhft.epiccarelink@nhs.net.

Where the user had an account and it has been inactive for over 180 days, it cannot be reactivated, therefore, as new request for an account must be submitted.

4.8 Update Facility Contact Information

Select the Admin tab and click My Facilities.

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

4.9 New Berkshire Site/Location Information

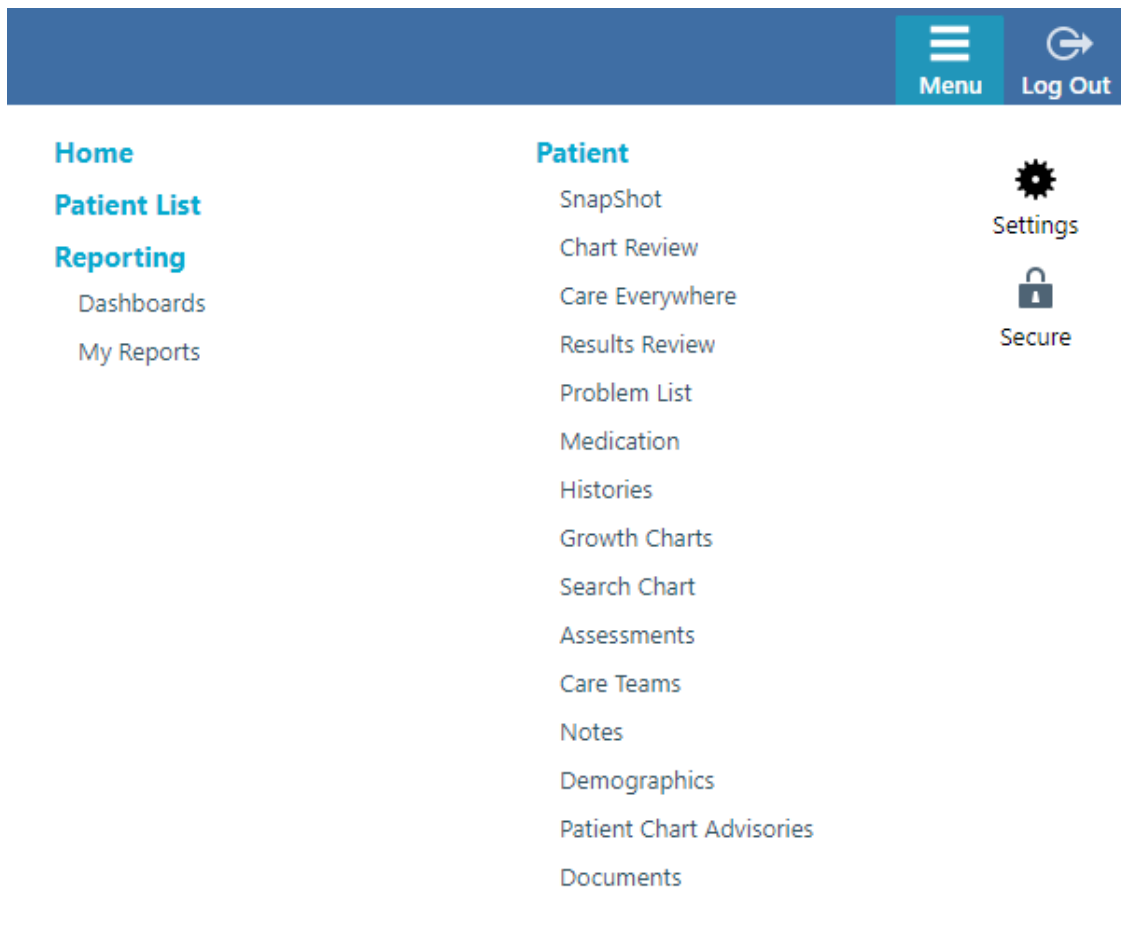
Where there is a need to add a new Berkshire location to EpicCare Link, the details of the new location need to be emailed to fhft.epiccarelink@nhs.net email address.

5 Information For EpicCare Link Users

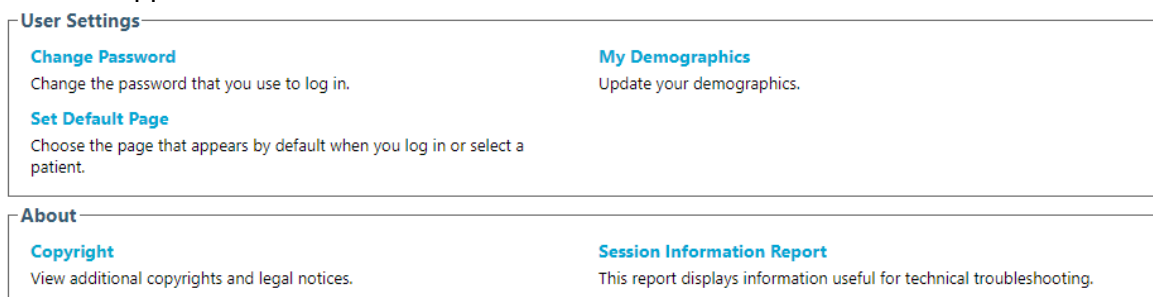
When a user first logs onto EpicCare Link, they will be prompted to change their password. Once the user has completed this, they will be asked to read and accept the EpicCare Link Terms and Conditions.

Users are able to change some settings:

- Reset your own password
- Update your demographics information
- Set a default page



To do this, in their account, they need to click on the “settings” button and the following menu will appear:



5.1 Change your Password

Go to Menu > Settings > Change Password.

Enter your old password, then a new password, and then your new password again.

Click  Accept.

5.2 Changing your Demographics

Go to Menu > Settings > Change Demographics.

Enter your new demographic information, then click  Accept.

5.3 Change your Default Login Page

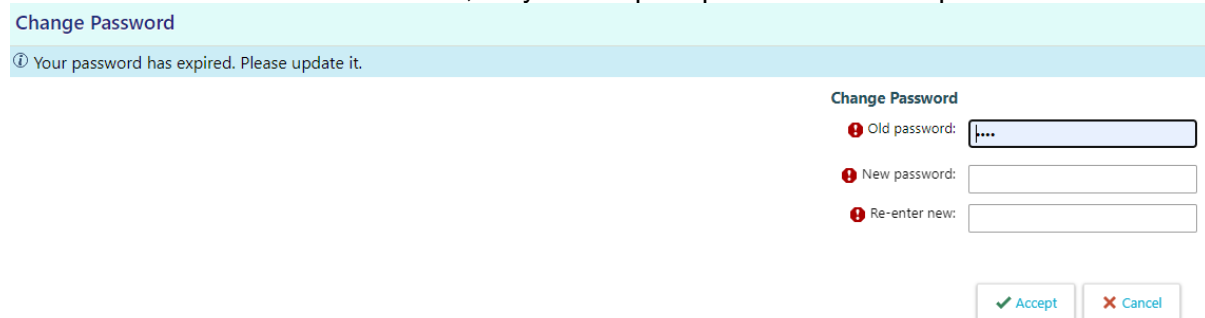
Go to Menu > Settings > Set Default Page.

Go to the page that you want to set as your default page.

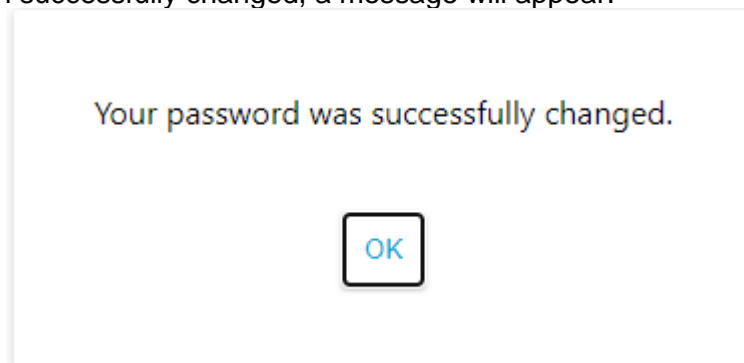
Click Set Default Page to set the current page as your default page.

5.4 User Resetting their Password

When a user first accesses the site, they will be prompted to reset their password:



Once, it has been successfully changed, a message will appear.



5.5 Setting up the 2-Factor Authentication

When the user first logs on they will be asked to complete the 2-factor authentication process. The following screen will appear for the user asking them which method they would like as the 2-factor authentication when they log onto EpicCare Link:

Extra Security Required

Choose how you want to receive passcodes that are required to access your FHFT EpicCare 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.

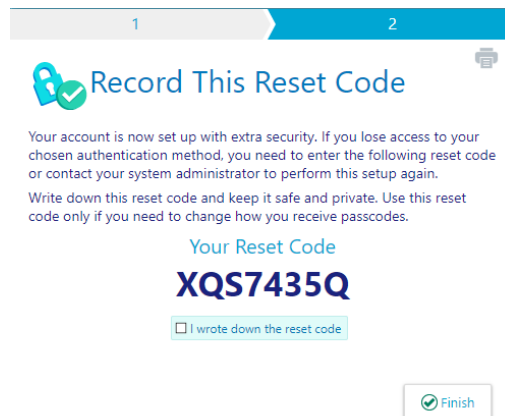
Choose Your Authentication Method



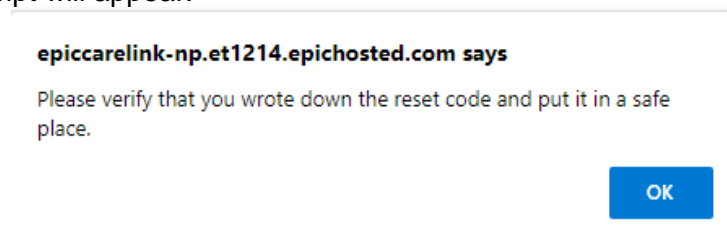
Cancel

Once the user has select the authentication method. A code will be sent to the authentication route selected.

When setting up the 2-factor authentication method, the user will be provided with a reset code, and are required to take a note of this code.

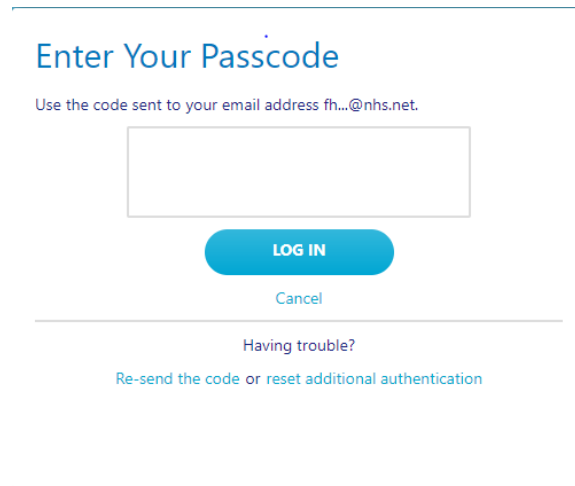


The user must tick the box to state they have written down the code. If the box is not ticked, the following prompt will appear:



5.6 Completing the 2-Factor Authentication Process

Once 2-factor authentication has been set up, the user will be prompted/sent a code to their authentication method (email or text). Once received, the user enters this code into the EpicCare Link screen and clicks “log in”.



Each passcode can be used only once.

Note: After you enter the passcode, you can select the ‘Remember me’ check box to indicate that you're using a device that is not shared with anyone else. This means that you won't be asked for a passcode the next time that you sign in from the **same device** for the next 30 days.

Note: If you do not select ‘Remember me’, you will be promoted to complete the 2-factor authentication process every time you need to log on.

If the user is not able to complete this process or does not remember their code, you will need to contact the Trust’s EpicCare Link team to be able to get the code reset.