NHS
Frimley Health
NHS Foundation Trust

EpicCare Link User Guide

1 Contents Page

1.1 Version Control

This guide will be made available to user to support their access and usage of EpicCare Link. Users will be informed if the guide has been updated.

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

Committed to excellence **Working together** **Facing the future**

2   Introduction/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/contact your Site Administrator for support and assistance.

2.1   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.

2.2   EpicCare Link Administrators

Each organisation who has been granted access to EpicCare Link, will have at least 1 Site Administrator. They will be responsible for requesting accounts for staff within their organisation, verifying the accounts and resetting staff passwords as well as providing support to their staff who have access to EpicCare Link.

Users should contact their Site Administrator in the first instance if they have a query. If the Site Administrator is not able to resolve the issue, they will escalate this to the EpicCare Link Team to resolve.

3   Logging onto EpicCare Link

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

3.1   Dual Account

If the user works in Frimley Health NHS Trust and accesses Epic whilst working within the Trust, they will already have an account in Epic and will be categorised as having a 'Dual' account. Where this is the case, access to EpicCare Link will be added to their account profile. Login details/passwords remains the same (regardless of whether the user is logging into Epic or EpicCare Link); if the user has an issue with their password or getting access, they must contact the Frimley Health IT Service Desk to get their password reset.

3.2 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:
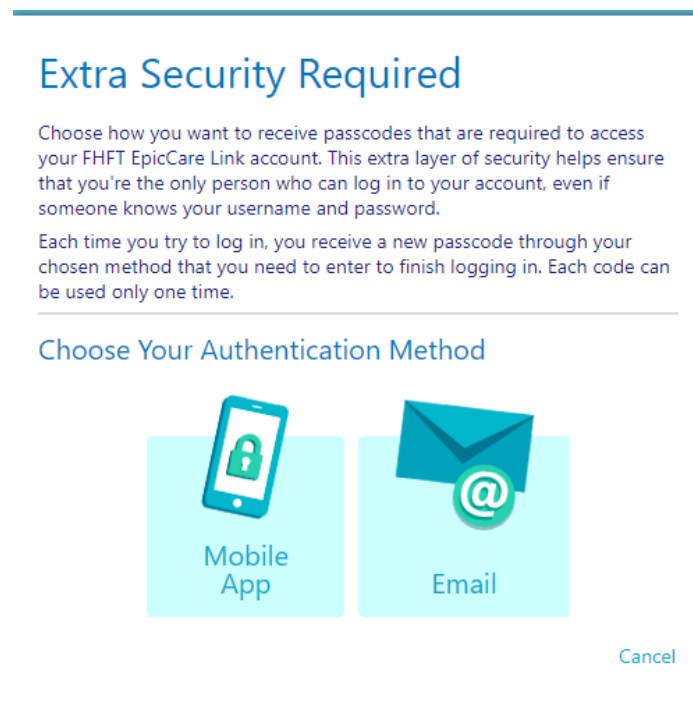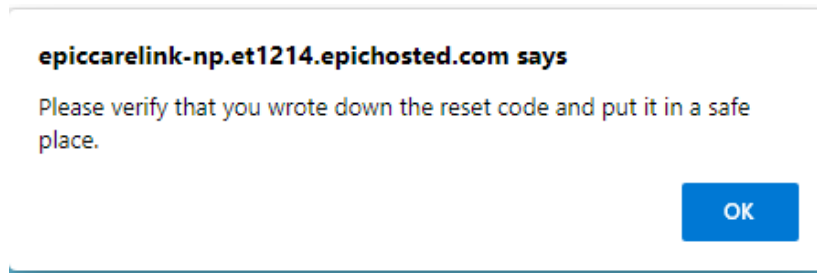

Once the user has select the authentication method. A code will be sent to the authentication route selected.

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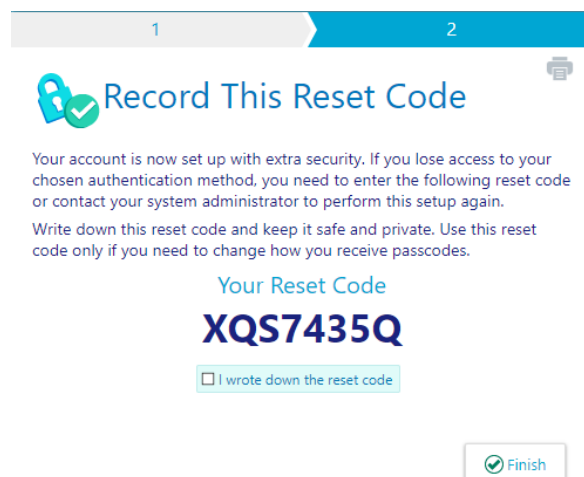
The user must tick the box to state they have written down the code. If the box is not ticked, the following prompt will appear:
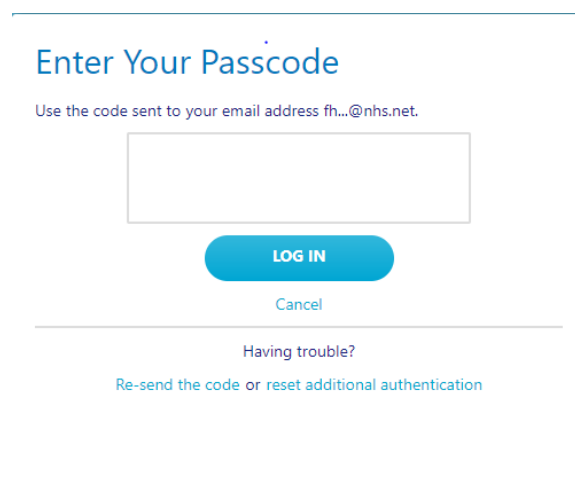
Committed to excellence   Working together   Facing the future

epiccarelink-np.et1214.epichosted.com says

Please verify that you wrote down the reset code and put it in a safe place.

OK

> **!** 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.

3.3 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".

Enter Your Passcode

Use the code sent to your email address fh...@nhs.net.

LOG IN

Cancel

Having trouble?

Re-send the code or reset additional authentication

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's not shared with anyone else. This means that you will not be asked for a passcode the next time 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 EpicCare Link Team on fhft.epiccarelink@nhs.net to get the code reset.

3.4 How do I log out?

To maintain patient confidentiality, you need to log out or secure your screen when you have finished using EpicCare Link 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.

3.5   Navigating in EpicCare Link

When you log in to EpicCare Link, several sets of navigation tools appear at the top of the page.
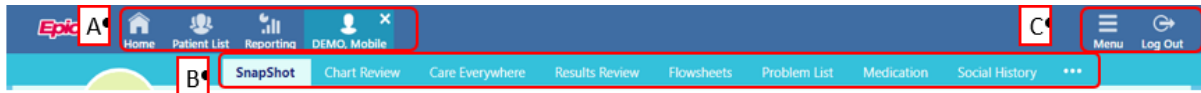
A) Navigation Tabs: Use these tabs to open different activities in EpicCare Link. Each tab contains one or more related activities. For example, the 'Patient' tab contains patient-specific activities. When you click into a tab, the default activity for that tab opens.

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 cannot 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.

4   Accessing a Patients Records via Epic Care Link

4.1   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.

> ℹ️ 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.

4.2   What If I Can't Find a Patient?

If you cannot 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.

4.3   Reviewing your Patients via the Patient's Chart

Click 👤Patient and go to the 'My Patients' tab.

If you have access to many patients, your patient's might appear on more than one page. Use the field at the top of the page to search for patients by their name.

Committed to excellence > Working together > Facing the future
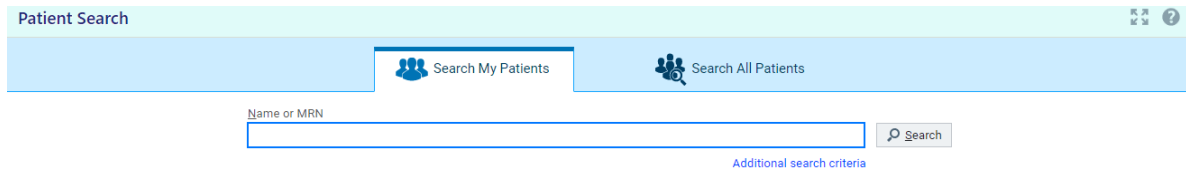
Click a patient's name to open their chart.

4.4 Accessing patients who are currently admitted to the Trust
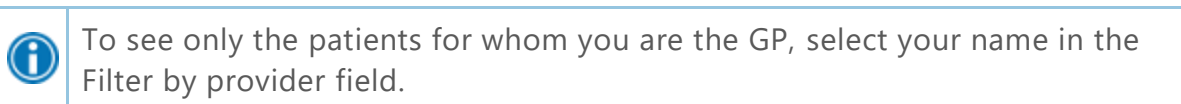
To view a list of currently admitted patients, select the 'Patient List' navigation tab and select the tab for admitted patients. For patients to appear on this list, you must have a clinician relationship of GP or form part of the patient's primary or secondary care team.
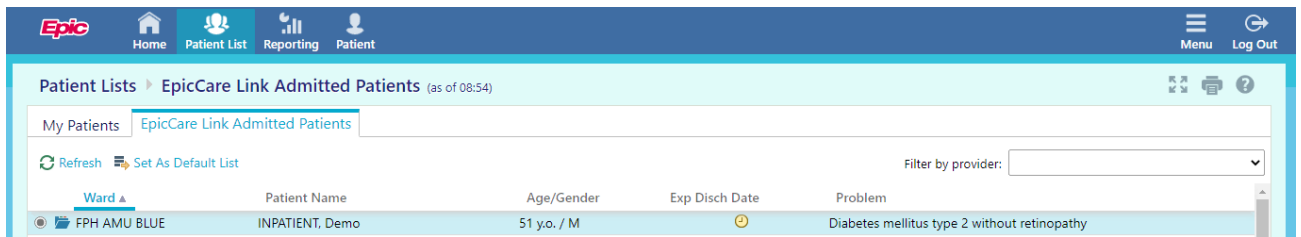
Select a patient's name to view additional patient-specific information in the report pane.

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.

Click 📂 to open a patient's chart.

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

4.5 Reviewing the Patient Chart

Open the patient's chart, click Chart Review, and select a tab that includes information that you want to review.
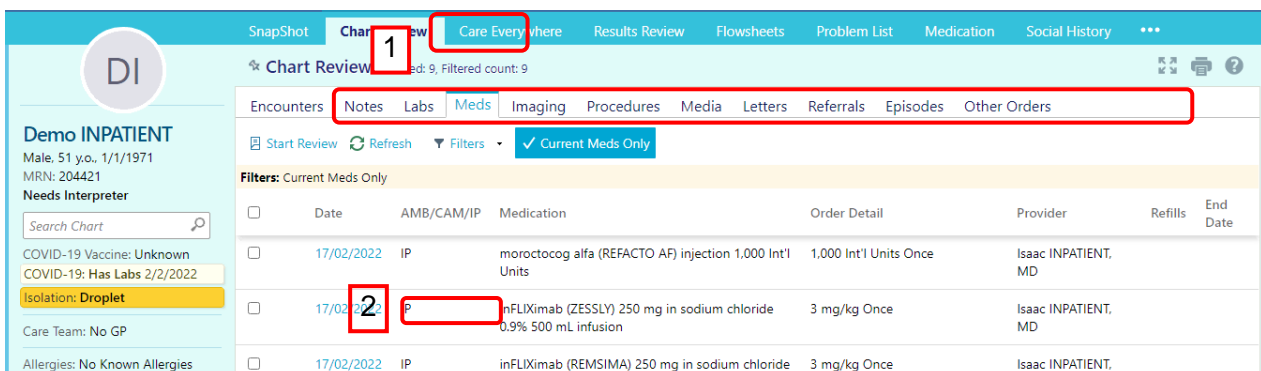
To view more detail, such as a specific patient's visit, click the date link that appears in the row.
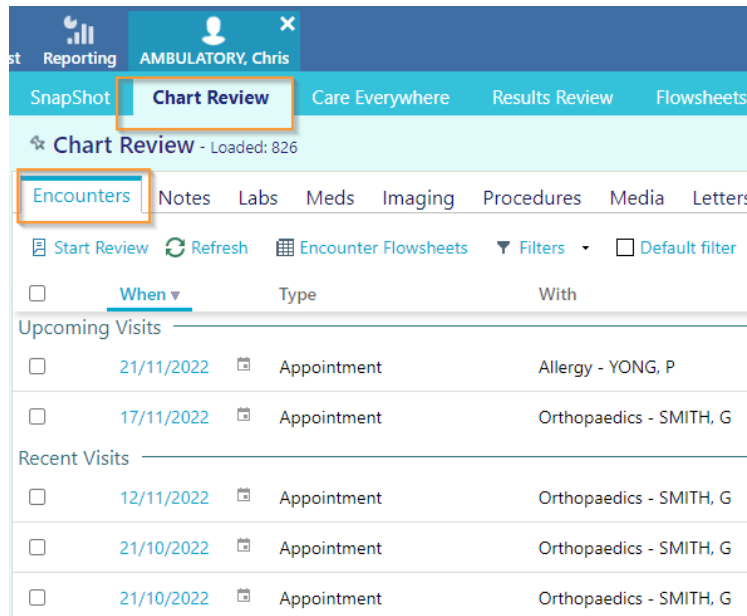
4.6 View a Patient's Demographics

Select the Patient 👤 tab and click Demographics to see a report with demographic information like the patient's address, GP, emergency contacts, and more.

4.7 View a Patient's Past and Upcoming Appointments

Select the 'Chart Review' tab and click encounters to see a report including the patient's past and future appointments.

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

4.8 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.

4.9 View a Patient's Past and Upcoming Appointments

Select the 'Chart Review' tab and click 'Encounters' to see a report including the patient's past and future appointments. To view more detail, such as a specific patient's visit, click the date link that appears in the row.

The system will not show the phlebotomy appointments.

4.10 View Referrals for a Patient

Select the 'Chart Review' tab and 'Referrals' to see a report of referrals at FHFT for the patient.

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

Committed to excellence   Working together   Facing the future

4.10.1 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.

4.10.2 View a Patient's Current Medications

Select the 'Patient' tab and click 'Medication'.

> ⓘ For more information about a medication, click 📄View Details.

4.10.3 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.

4.10.4 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.

4.10.5 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.

In 'Chart Review' select a tab.
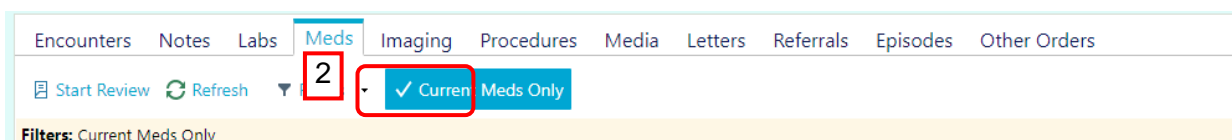
Click 🔻Filters and select a filter type. Then, select check boxes next to the values that you want to see. For example, select 'Encounter Type', and then select 'MDT Meeting'.

Click ✔ Apply to make the results of your search appear.

Committed to excellence > Working together > Facing the future

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

4.10.6 View Trending Data in Graph or Table Format in 'Chart Review'
In 'Chart Review', select the check box for the data you want to view. For example, select specific visits or lab tests.

Select the type of flowsheet that you want to create.
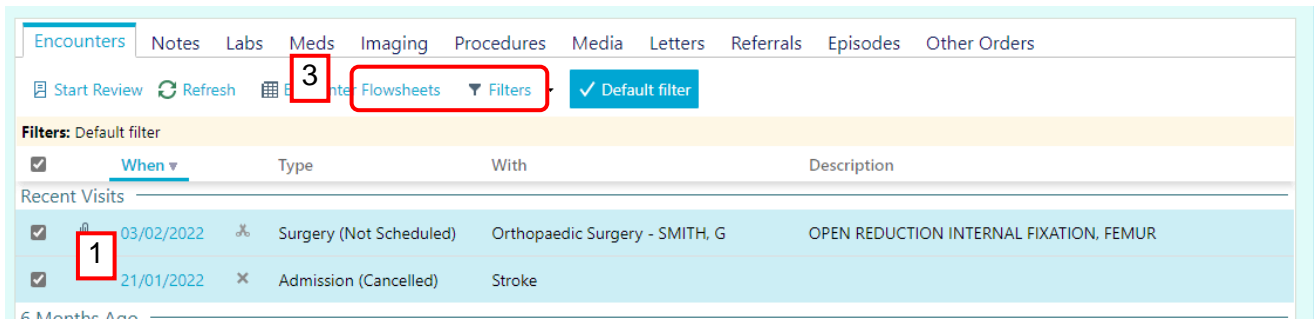
Click 🔳 'Encounter Flowsheets' to graph data such as vital signs or medications. Then select a specific flowsheet, such as 'Diabetes – Brief'.

You can also trend data in the Labs tab by clicking 🔳 'Lab Flowsheets'.

Click and drag to select the table cells that contain data that you want to graph.

Click 📈 Line Graph or 📊 Bar Graph to create a graph of the selected data.
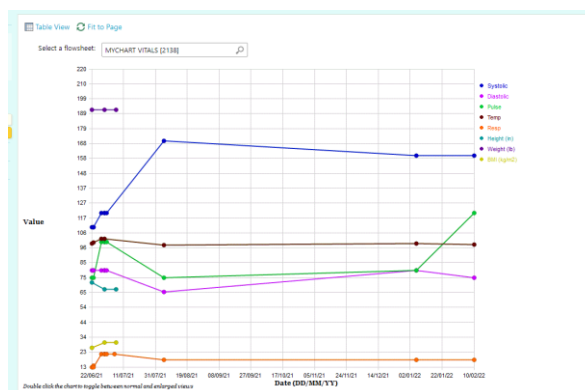
4.10.7 View a Patient's Trending Lab Results in 'Results Review'

Note: Only FHFT results will be available to view via EpicCare Link.

Select the 'Patient tab' and click 'Results Review'.

Select the date range for the results data you want to see and click ✔ Accept.

Committed to excellence   Working together   Facing the future

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.

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.

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.

4.10.8 Customise the Way Results Appear
In 'Results Review', click ☰ Options.

To make the most recent results appear from left to right by default, select the Trend Dates in reverse chronological order check box.

Set your other default preferences, such as the default number of columns to show, using the other options.

Click ✔ Accept.

## 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

Committed to excellence   Working together   Facing the future
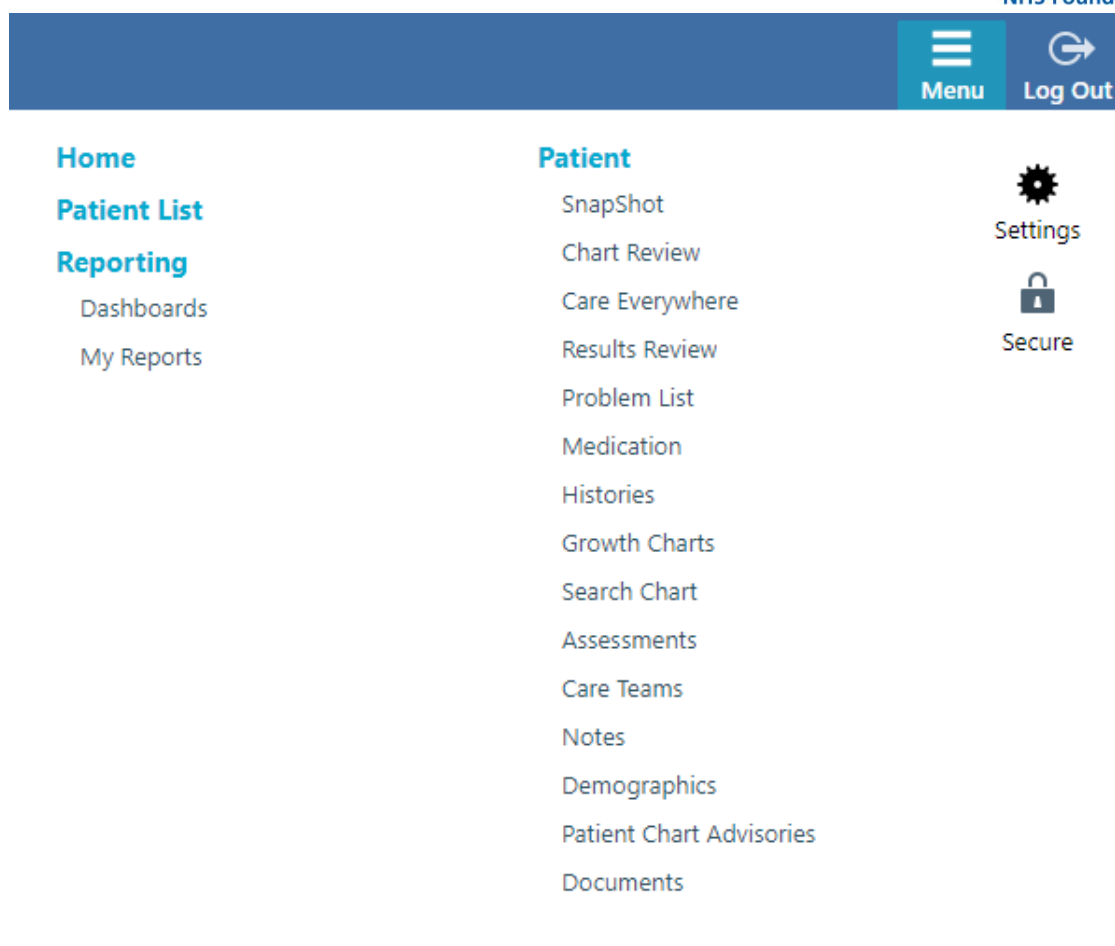
To do this, in their account, they need to click on the "settings" button and the following menu will appear:
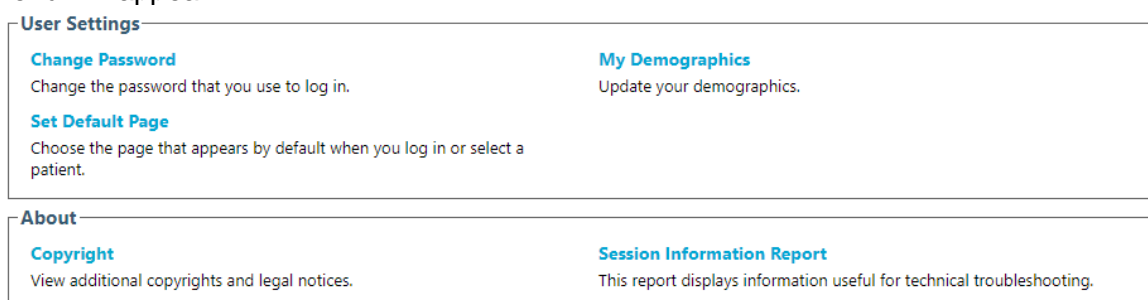
5.1 Change your Password
Go to Menu > Settings > Change Password.

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.

Committed to excellence   Working together   Facing the future