

EpicCare Link Site Administrator Guide

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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

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: fht.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 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 EpicCare Link Users

There are 3 different roles which can be selected:

- Link GP
- Link GP Clinical Support Staff
- Link Front Desk Staff
- Link Site Admin

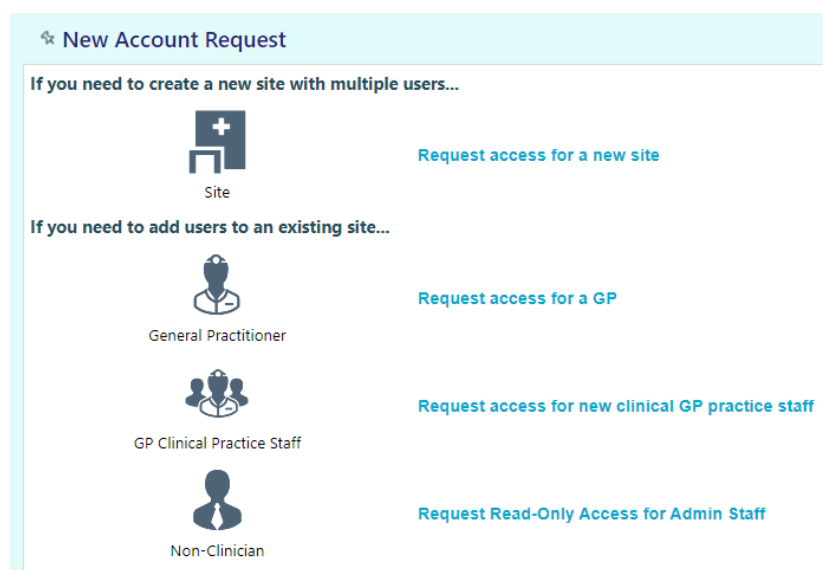
The Trust has produced a Guide for EpicCare Link users which can be located at:

<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 full job title of the member of staff is required; if the member of staff is a clinician, their professional registration number needs to be included when completing the form. If this information is not provided, the request will not be processed. If a site is not named/available within the form, 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:

✦ New Account Request ▶ Confirmation 🖨️ ?

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.

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 Reviewing status of Users’ 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”.

smith, mary	Record Generation Completed	6/9/22	mary.smith@nhs.net		53293
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Once the account generation has been completed, the EpicCare Link Team will email the user with their username and password, copying in the Site Administrator to the initial email containing their username.

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

Note: Site Administrators can only see the requests they have created, they cannot see the accounts/requests completed by other Site Administrators within their organisation. Therefore, if there is a query on whether an account has been requested, the Site Administrators will need to liaise between themselves to find other requests/email communications.

Note: Where the username is greyed out, this means the account is inactive. To make the account active again, the site administrator will need to email the ECL team, with the users full name, job title.

4.2 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	Last Login	Action
EPICCCARE LINK, Site Administrator	LINKSITEADMIN	No		No	25/8/2022 14:45	Setting initial password / resetting passwords
HEALTHY PLANET LINK, Care Coordinator	LINKKCC	No		No	30/5/2022 17:25	Key icon
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.

4.3 Resetting Password

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	Action
EPICCCARE LINK, Site Administrator	LINKSITEADMIN	No		No	25/8/2022 14:45	Setting initial password / resetting passwords
HEALTHY PLANET LINK, Care Coordinator	LINKKCC	No		No	30/5/2022 17:25	Key icon
SURGEON, Sidney, MD	(No Access)	Yes		No		

Click on the Key icon, and it will display:

Change Password for EPICCCARE LINK, GRACIE

You cannot enter a blank password.

New Password Verify New Password

Password Change Reason

Password for EPICCCARE LINK, SITE ADMINIS...

Accept Cancel

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 categorised 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.

4.4 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.


4.5 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 reenabled, an email needs to be sent by the Site Administrator to fht.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 account must be submitted.

4.6 Update Facility Contact Information

Select the Admin tab and click My Facilities.

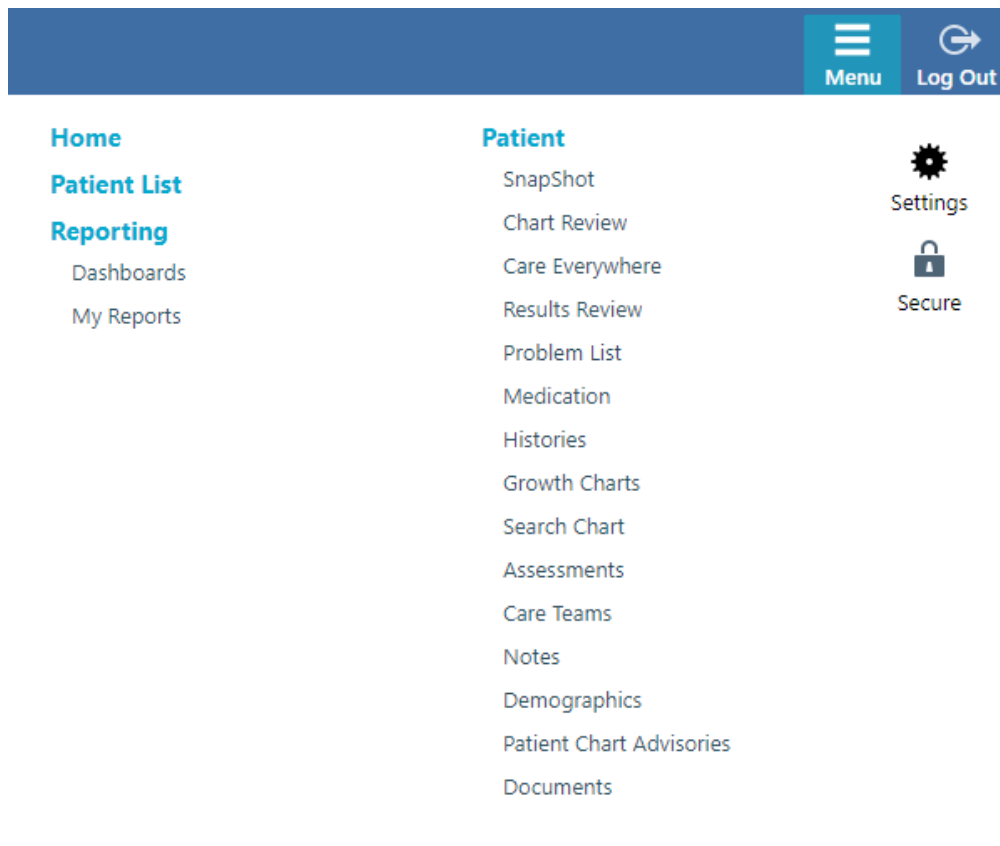
Within the My Facilities tab you can click the name of a facility to update its contact information, including the phone number, and address. After you've finished editing contact information, click  Accept.

5 Information For EpicCare Link Users

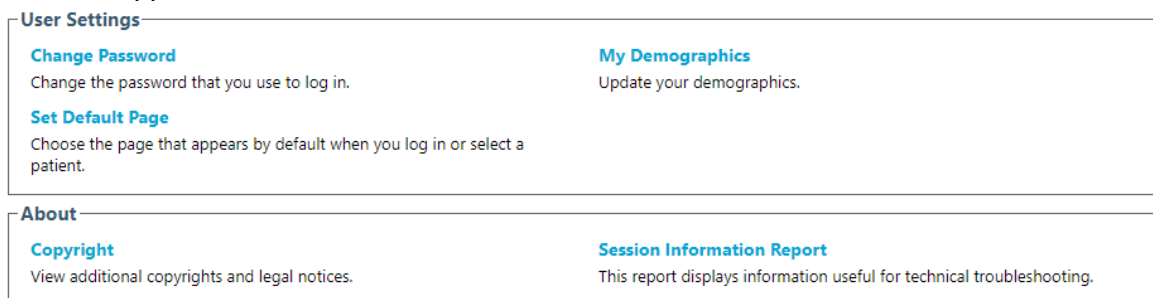
When a user first logs onto EpicCare Link, they will be prompted to change their password. Once the user has completed this, they will be asked to read and accept the EpicCare Link Terms and Conditions.

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

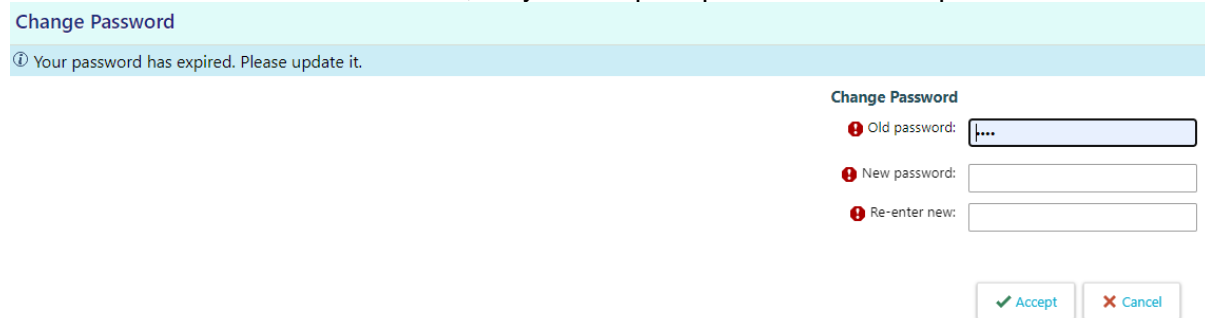
Go to Menu > Settings > Set Default Page.

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:





Change Password



 Your password has expired. Please update it.

Change Password

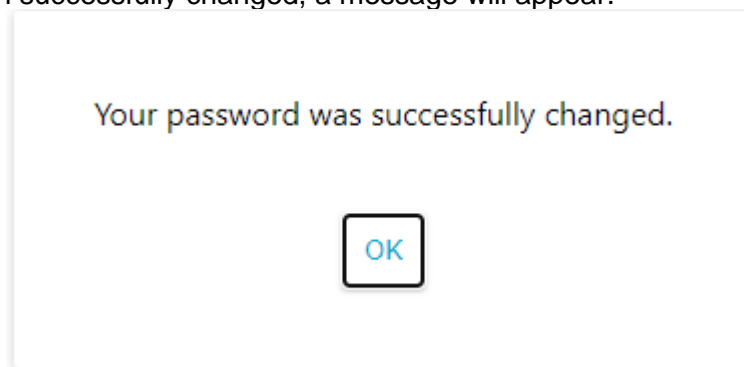
 Old password:

 New password:

 Re-enter new:

 Accept  Cancel

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.

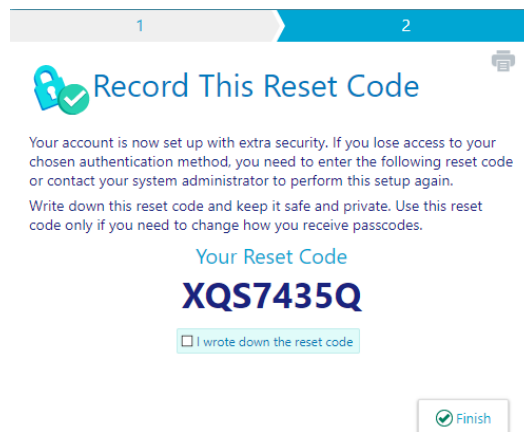
Choose Your Authentication Method



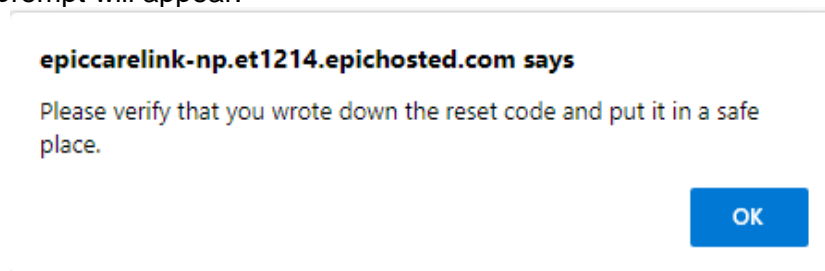
Cancel

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

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

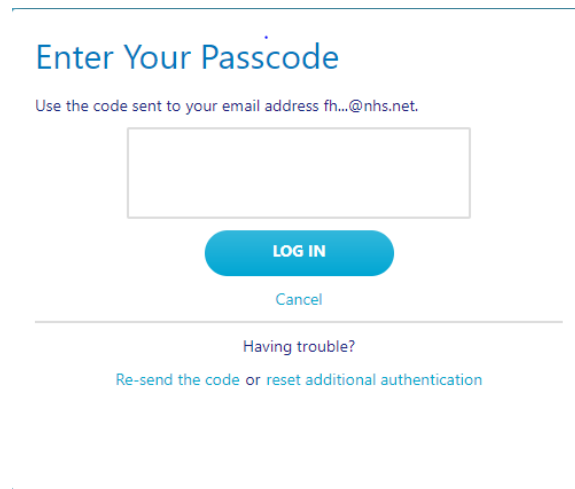


The user must tick the box to state they have written down the code. If the box is not ticked, the following prompt will appear:



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'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 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.