



Vitruvian Health

Epic

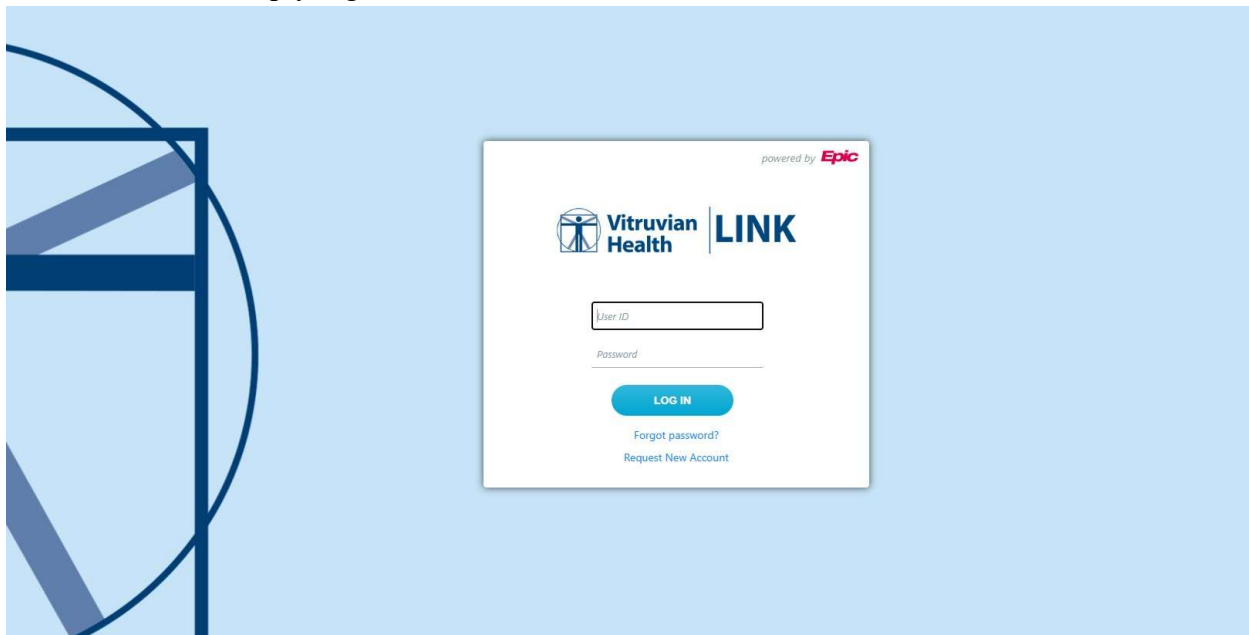
Submitting a New Epic Account Request, Establishing Site Administrators and End-User Access

Submission Process

1. Copy the following link and open in Google - <https://epiccarelink.vitruvianhealth.com/>

epiccarelink.hamiltonhealth.com/

2. Under the login box, click the “Request New Account” link to set-up new Epic Account. If your location is already an established account with access to Vitruvian’s EpicCare Link then simply login.



3. On the next page, click “Request a new site”



Create User Accounts for Your Site



Request a new site

A site represents your workplace and must exist before you can add user accounts.



Add a user to an existing site

If someone at your workplace already has access, your workplace has a site.

- a. Select between the “Site” (i.e. Independent Clinic) and “Post-Acute Care Site” (i.e. Skilled Nursing Facility) options.
4. Fill in the relevant and required information for each site. Once complete, click “Next” in the bottom right-hand corner of the page.
5. Once filling in relevant information for each site, you can begin requesting access for individual users. Select from the following User list for the appropriate designation for each end-user.
-If you are requesting for a Post-Acute Care facility, your user types will be Continued Care and Services Coordinators



Add a user to your site

Choose a type of user to create:

Provider

Request access for a new provider

Clinical Staff

Request access for a new clinical staff member

Non-Clinician

Request access for a new non-clinician

Continued Care and Services Coordinator

Request access for a new continued care and services coordinator

Billor

Request access for a new biller

Requester

Request access for a requester

Specimen Collector

Request access for a specimen collector

6. Notes on user types:

At least one user must be listed as a Site Administrator. The person who is submitting this request on behalf of themselves and their users is likely the practice manager or

administrator and is therefore most suitable for this. We recommend two Site Administrators in order to continue access if one Site Administrator leaves your practice.

- a. Any user type can be a site administrator, so if you are both a practice administrator and also part of the medical staff, you can select Clinical Staff. If you do not directly oversee patients, you can select “Non-Clinician” for yourself and other users, such as front desk staff. Note – **For security purposes site administrators will be responsible for designating, deleting and on-going verification of end-users.**
- b. To make someone (including yourself) site administrator, check the box at the bottom of that user’s request page (See next screenshot):

The screenshot shows the Epic user creation interface for a Non-Clinician user. The breadcrumb trail at the top reads: "New Account Request > Site > Users > Add User > Non-Clinician". The form is divided into several sections:

- User Information:** A text field for "Name [Last,First]".
- Basic Information:** Fields for "Work e-mail:" and "Work phone:". Below this is a "User Address:" section with a "Copy site address" button. The address fields include "Address:", "City:", "State:" (a dropdown menu), "ZIP:" (a text field), "County:" (a dropdown menu), and "Country:" (a dropdown menu).
- Other:** A large text area for "Comments".
- Site Administrator:** A section with a definition: "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." Below this is a checkbox labeled "Make this user a site administrator".

At the bottom right of the form are two buttons: "Accept" (with a green checkmark icon) and "Cancel" (with a red X icon). A red arrow points from the left towards the "Make this user a site administrator" checkbox, and a blue arrow points from the right towards the "Accept" button.

7. After entering each user, click on “Accept” (see blue arrow above)
8. To add additional end-users click on “+ Add” and follow the above steps 5 through 7. To delete and end-users simply click on the designated end-user and click “- Delete”
9. Once you are finished adding new users, hit “Verification” in the bottom right.
10. Agree to the Terms and Conditions, verify you are not a robot, and type the name of whomever is submitting the request and click “Submit Request”
11. To add and delete end-users in the future please login to epiccarelink.hamiltonhealth.com/ and select “Add a user to an existing site”



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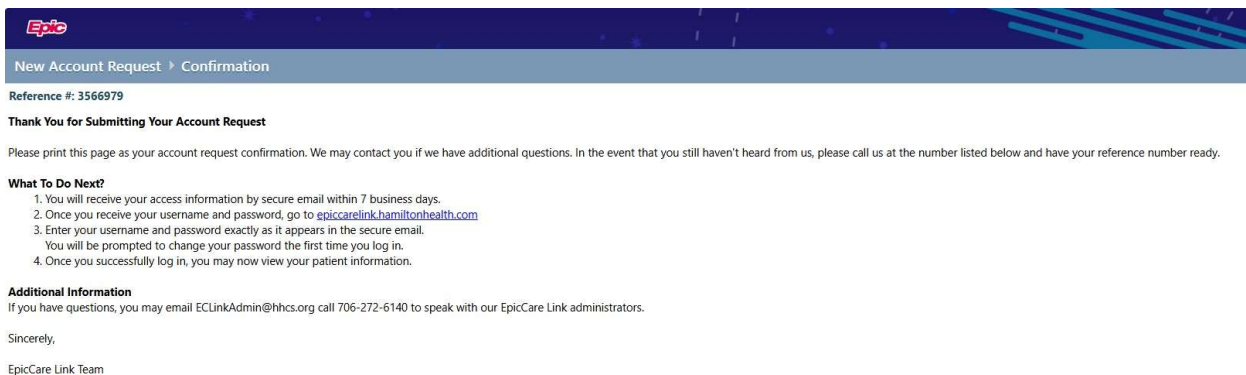
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Post-Submission Process

12. Once you click “Submit Request” the website should bring you to a confirmation page.

- a. Once you have arrived at the Confirmation page Click “Ok” in the lower right hand of the corner.



- b. If the confirmation page is blank, that is due to technical issues that we are overcoming currently. You may proceed with clicking “OK” in the lower right hand corner of the page. If you are a site administrator, you will receive your login information within 7 business days. If you do not receive confirmation of your enrollment with 7 business days please email ECLinkAdmin@hhcs.org.

- c. **IMPORTANT** - By separate email the site administrator will be sent a Site Agreement from ECLinkAdmin@hhcs.org. The agreement must be signed by the site administrator, then scanned and sent back to ECLinkAdmin@hhcs.org OR uploaded to your electronic account request prior to being granted access to Vitruvian’s EpicCare Link. If you do not have access to a scanner please send an email or any questions to ECLinkAdmin@hhcs.org.

Username and password generation

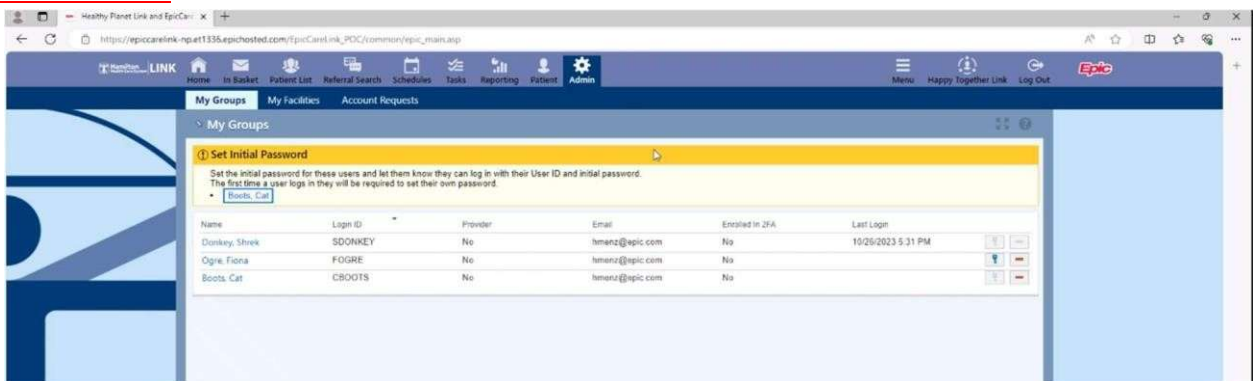
13. When you submit your access request, you will be asked to provide a contact email, and will receive an email to verify your address. Then, when your account has been successfully set up, you will receive an additional email with your User Login ID and a link to set your password.

14. When you first log in as the Site Administrator, you must go to the My Groups activity, under the Admin tab on top (see screenshot A below).

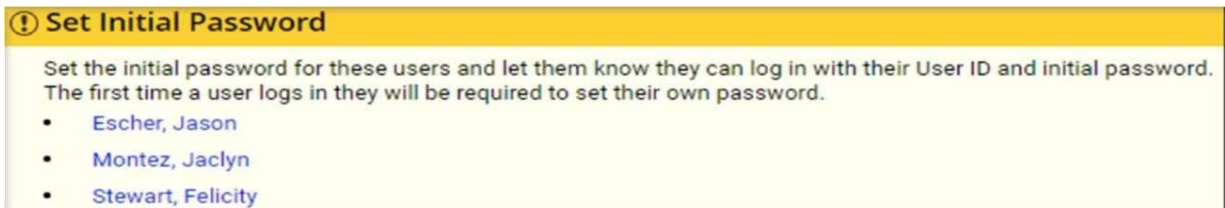
15. The end-user username is located under the “Login ID” column. If you desire you can then set the temporary passwords for each of your end-users you established in step 5 above, using any random password generator you can find on google (i.e. <https://www.random.org/passwords/>)

Once the temporary password has been established, click on the blue Hyperlink of the end-user under the “Set Initial Password” section (Screenshot B) and enter the temporary password. Once the end-user logs in for the first time, they will be required to change the temporary password to a long-term password they will use to log-in once Hamilton’s Epic system is live (see Screenshot C)

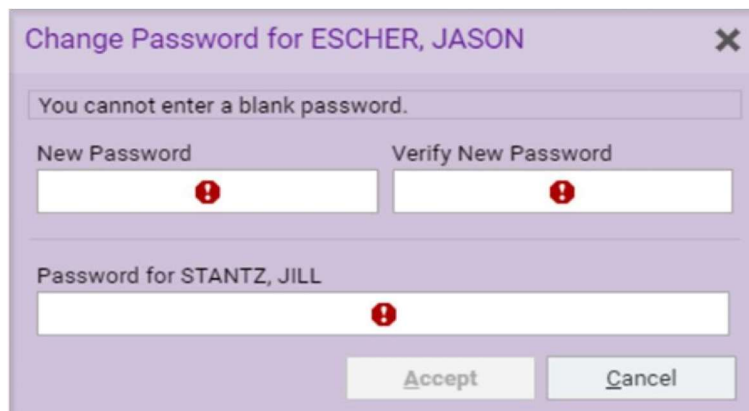
Screenshot A



Screenshot B



Screenshot C



16. Finally, securely communicate the usernames and temporary passwords to your end-users. When they log in for the first time, they will have to change their password as well.

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If you have any questions, please do not hesitate to contact EClinkAdmin@hhcs.org.