



**BROWN**  
UNIVERSITY  
**Health**

**LifeChart**  
One patient. One record. One system.

# CARELINK USER GUIDE

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# Purpose

## **Purpose:**

This guide provides comprehensive instructions for using **LifeChart (Epic) CareLink**, including accessing patient records, reviewing clinical information, managing In Basket messages, placing orders, and performing site administrator functions to support patient care coordination across Brown University Health.

## **Department/Specialty and Audience:**

LifeChart (Epic) CareLink; intended for external providers, clinical and non-clinical staff, and CareLink Site Administrators who use CareLink to access patient information, communicate with Brown University Health clinicians, manage referrals and orders, and administer CareLink user accounts.

# CareLink Access

Welcome to CareLink. CareLink was designed to give you access to your patients' Lifespan medical record.

# CareLink Basics

## Broadcast Messages for Site Administrators for New Accounts

Let site administrators know they will now receive broadcast messages with info for new accounts they requested, and they can set initial passwords for new accounts in My Groups. See [Site Admin Section](#) for more details.

## Browser Requirements

- Google Chrome version 118 or later. Previously, version 106 or later was supported.
- Microsoft Edge version 118 or later. Previously, version 106 or later was supported.
- Mozilla Firefox version 115 or later. Previously, version 102 or later was supported.
- Safari version 17 or later. Previously, version 15 or later was supported.

## Multifactor Authentication

CareLink will require Multi-Factor Identification when logging into CareLink. Follow on screen prompts to complete the workflow. Site Administrators can assist you with resetting your MFA, if required.

## Extra Security Required

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



Mobile App



Text Message



Email

Cancel

## Happy Together

You can link all your Link accounts utilizing Happy Together.

### Happy Together Link

Access all of your Link accounts from one place without entering your login information again.

Let's get you connected.

[Begin Connecting Your Accounts](#)

[Dismiss](#)

### Filter by primary care provider in Patient Search

#### Patient Search

Search My Patients | Search All Patients | Create a New Chart

Name or MRN

Additional search criteria

	Patient Name	MRN	Status	Sex	Birth Date	Address	SSN	Phone
A	Alvarado, Patricia	203242	Alive	F	05/20/1936	123 Anywhere Street Verona WI 53593	xxx-xx-7584	H: 555-555-5555
B	Apple, Ralph	206427	Alive	M	10/01/1966	123 Main St. Verona WI 53593	xxx-xx-0000	H: 608-555-5555
C								

## Better Troubleshooting with Session Information Report

support is likely to ask you for, like your compiled profile. To view the report, go to the **Settings** page and click **Session Information Report**.

### EPIC FACILITY FSS1-3732564

6/7/2021 10:10 AM

#### Additional Support Reports

- Show Support Reports
- Show Report and Print Group IDs
- Installed Special Updates
- Chart Review Settings
- Mobile Configuration
- Epic Debug Toggles
- Epic ELF Summary

#### Profile Compilation

Note that any dynamic profile overrides are not considered here. They can be seen in the EpicCare Security section.

User Level Profile: Link Clinical Support Staff (Partial Profile) [110000038]  
 Sec Class Profile: Link Security Class (Partial Profile) [110000000]  
 Department Profile: None  
 Location Profile: None  
 Serv Area Profile: None  
 System Dets Profile: System Definitions (Fixed Profile) [1]  
 Compiled Profile: COMPILED;110000038;110000000;... [216133]

#### Compiled Profile Summary

#### Patient Encounter Workspaces

#### Login Information

Workstation: EPIC SUPPORT [1]

#### EpicCare Security

##### Basic Information

Default security class: LINK STAFF WITH EDIT [110000025]

##### Department Overrides

Department Security Class Restricted Access

##### Profile Overrides

Encounter Department Department

##### User Departments

Primary department: EHS COMMUNITY PRACTICE [3010101]  
 Secondary departments:

##### Provider Options

Provider at Lock to linked provider [1]

#### EpicCare Inpatient Security

##### Basic Information

Default security class: LINK IP CLINICAL [110000016]

##### Department Overrides

Department Security Class Restricted Access

#### Template Linking Information

##### General

Currently applied linkable template: LINK CLINICAL SUPPORT STAFF TEMPLATE [T1100401]

##### Available Linkable Templates

LINK CLINICAL SUPPORT STAFF TEMPLATE [T1100401] (Applied, Default)

#### In Basket Security

##### General

Security class: LINK IB STANDARD [110000008]  
User Classifications: EHS Link Group [110000000]

#### Shared Security

Security class: Shared Clinical-Level 2-Ambulatory User [400004]

#### User Roles

##### General

Default user roles: LINK DASHBOARD USER [110000001]

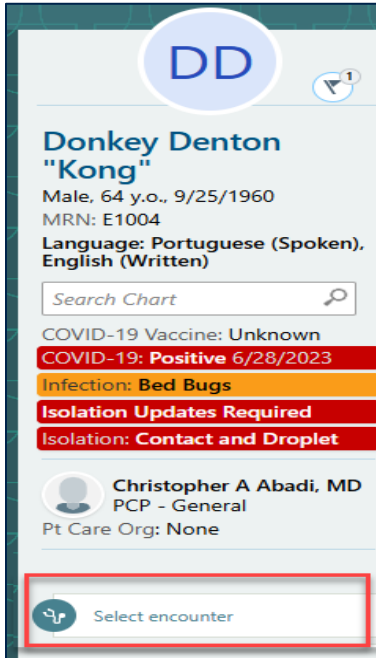
##### User Role Overrides

Department User Role Override

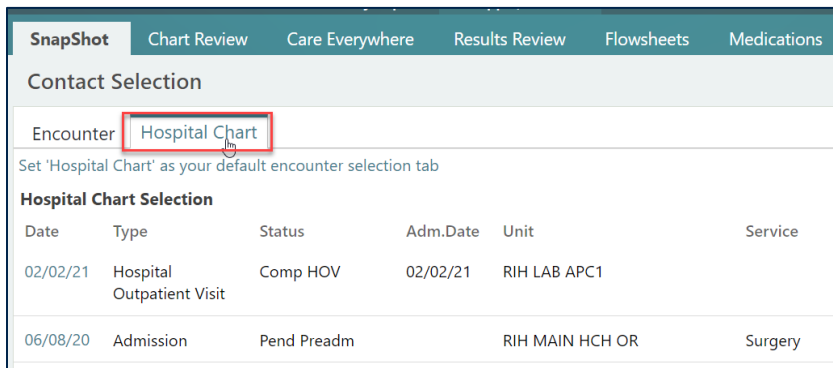
# CareLink Features

## Patient Summary Tab

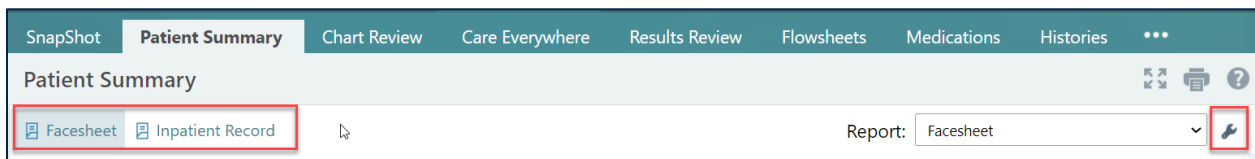
1. Open patient's chart.
2. Click on Select Encounter in the patient's storyboard.



3. Go to Hospital Chart tab and open encounter.



4. Patient Summary is an activity next to Snapshot.



5. Default reports of Facesheet and Inpatient Record are viewable.
  - a. Facesheet

Report navigation: Facesheet, Inpatient Record, I/O

**Index**

Current Meds	I&O and Results
Selected Labs	Diet Orders
Active Lines	Problem List
Allergies	History
Treatment Team	SmartLinks and SmartPhrases
ED Med Admin (past 48hrs)	Universal Protocol
Facesheet	OR Universal Protocol
Provider Notification	Charge Review
HBIPS Indications	Respiratory Report
Vitals	After Visit Summary
Pain Monitoring	Home Medication History
Surgical Pathway	

**b. Inpatient Record**

Report navigation: Facesheet, Inpatient Record, I/O

**Intake/Output**

Row Name: 06/15/21 1000

**Intake (mL)**

P.O.	25 mL -JO
Percent Meals Eaten (%)	50 % -JO
Percent Supplement	10 % -JO

**Output (mL)**

Urine	50 mL -JO
Emesis	50 mL -JO
Stool	100 mL -JO
Estimated Blood Loss	50 mL -JO
Pleural Thoracentesis (mL)	50 mL -JO
Paracentesis (mL)	50 mL -JO
Other	50 mL -JO

6. Add more reports by clicking on wrench. Click Add Report. Rearranged as needed.

Report:  **Add Report**

Remove  Report

Facesheet

Inpatient Record

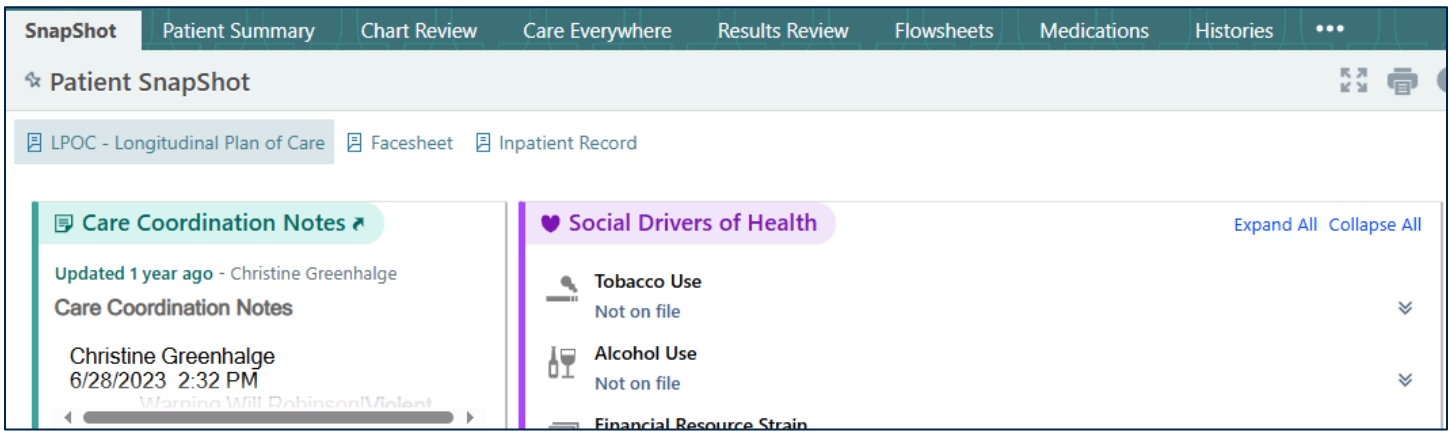
I/O

Down

Display Name	
<input type="text" value="Facesheet"/>	[Default Report]
<input type="text" value="Inpatient Record"/>	
<input type="text" value="I/O"/>	

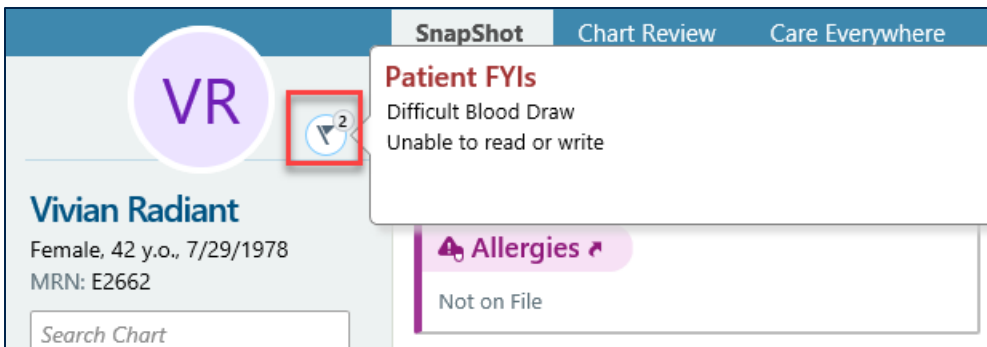
## Social Drivers of Health

Learn more about your patients social drivers of health by using this feature in Longitudinal Plan of Care report on Patient Snapshot. Hover to discover more information. This information is gathered by information documented in patients' Social History in Lifechart.



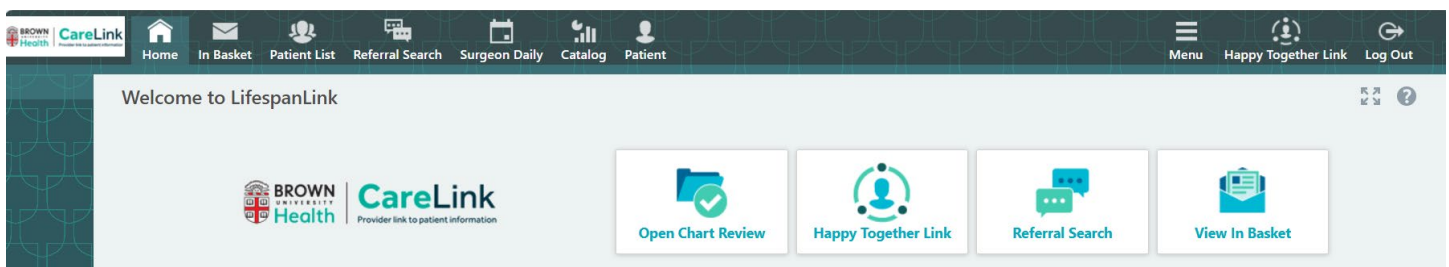
## Patient Flags

You have access to view any “flags” placed on your patients’ record. The flag will appear next to their name in storyboard, simply hover to discover.



## Features

### Menu



Home is the default log on page giving access to patient events to which you have subscribed (Inpatient Notifications, Lab results, Imaging results, etc.). New quick click buttons.

**In Basket** alerts you to all your patient’s information and allows you to send messages to Lifespan providers.

**Pt. Lists** shows all patients where:

- You or one of the providers in your practice is the patient’s PCP,

- You or one of the providers in your practice is on Patient’s Care Team,
- You or one of the providers in your practice either referred the patient to Lifespan, or vice versa.
- Someone in your practice has manually searched and located a patient that was not automatically added to your group in the scenarios above (First Access)
- Someone in your practice created the patient.

**Referral Search** allows you to search referrals, incoming or outgoing, referred by, referral status, and scheduling status.

**Schedules** shows upcoming appointments for your patients and surgeries.

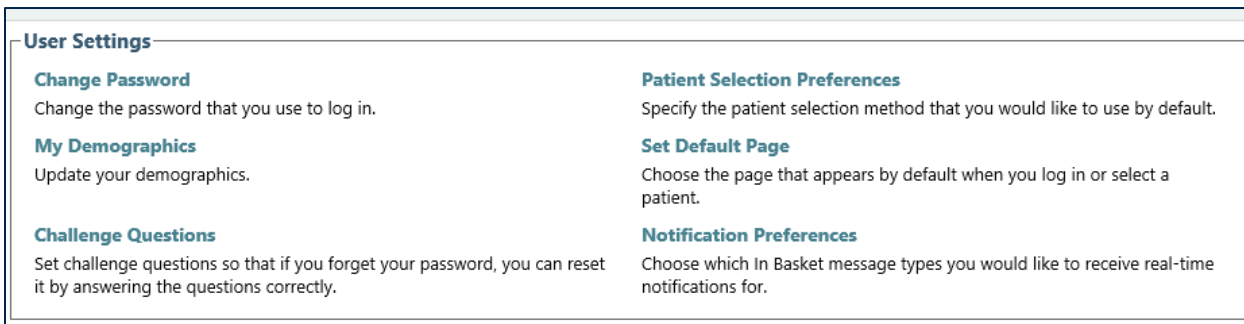
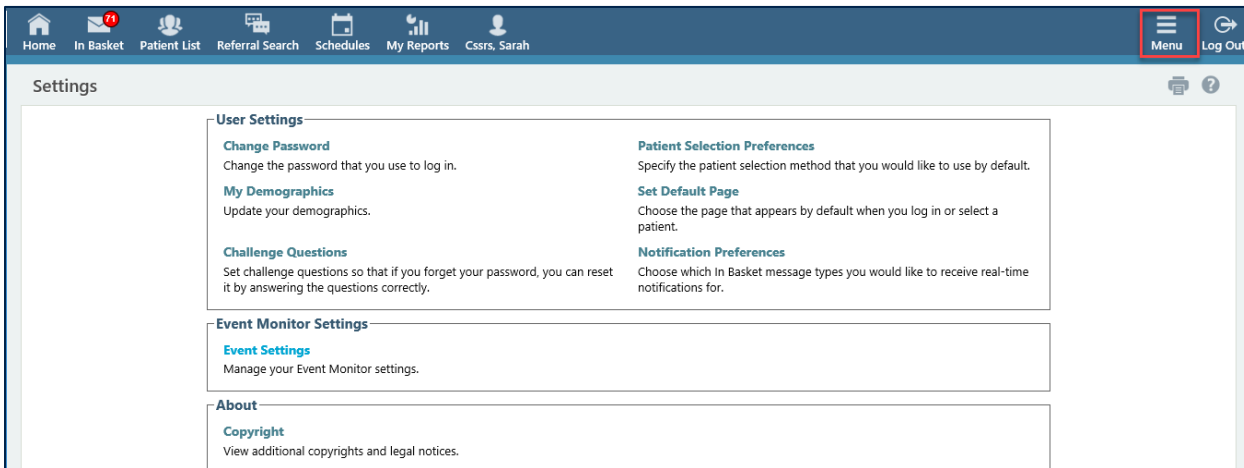
**Reporting** shows all reports you have access to view.

**Patient** allows you to search for any patient with Lifespan medical record (this should only be done only for patients in your care).

**Menu-** gives you access to all functionality, including Utilities. Utilities allows you change passwords, demographics, challenge questions, set default page, and set patient selection preference. It also allows for changing of Event Settings for you Home page notifications.

**Log Out** ensures that patient information stays confidential when you complete your review.

Use Menu Settings to change passwords, demographics, challenge questions, and personal preferences.



## Update Event Settings

CareLink allows you to choose which notifications you would like to receive on your home page. Clicking on the patient from event opens the in basket with more information about event for your review.

To receive notification, you will need to ensure that your Event Settings are set to receive Result notifications.

1. On home page click on the Menu shortcut and click on Settings.
2. Choose Event Settings.
3. Check the boxes next to the items you want to receive. Accept.

Settings > Event Settings

**Event Filter**

Select which types of events you want to receive notifications about. Note that you might not be notified about sensitive events due to privacy concerns.

**ED Notifications**

ED Arrival  ED Arrival Cancelled  ED Discharge  ED Discharge Cancelled  ED Dismiss  
 ED Dismiss Cancelled

**Inpatient Notifications**

Admission  Admission Cancelled  Discharge  Hospital Outpatient Visit Cancel  Hospital Outpatient Visit Confirmed  
 Labor / Delivery Assessment  Newborn Delivery  Preadmission

**New Patient Notifications**

New Patient Access

**Outpatient Notifications**

Appointment Cancelled  Appointment Checked-In  Appointment Checked-Out  Appointment Scheduled  Visit Charting Completed

**Pt Status Notifications**

**Relationship Filter** ⓘ

Notify me for:

All events for patients in my group  
 Only events associated with my group  
 Only events associated with me (recommended)  
 Only associations that I select

Information here.

## Resetting a Password

Change your own password so you don't have to contact an administrator to do so. It's best to change your password at regular intervals for security reasons.

Settings > Change Password

Old Password

New Password

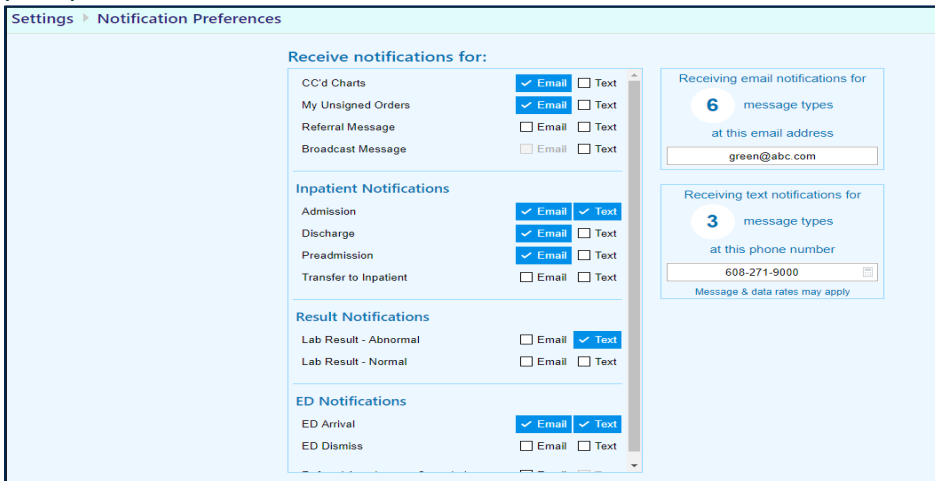
Verify New Password

Accept Cancel

## Alternate Email Address

You can receive email notifications from CareLink In Basket Messages to an alternate email address. The e-mail notifications are sent immediately after you receive the In-Basket message in CareLink to the alternate address.

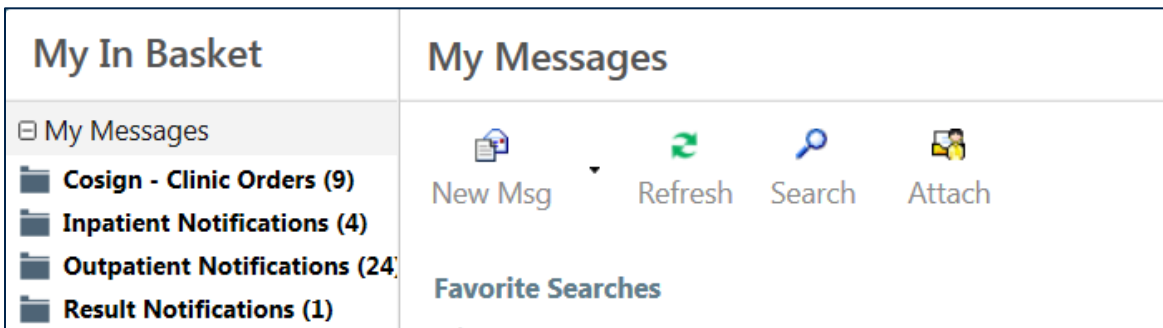
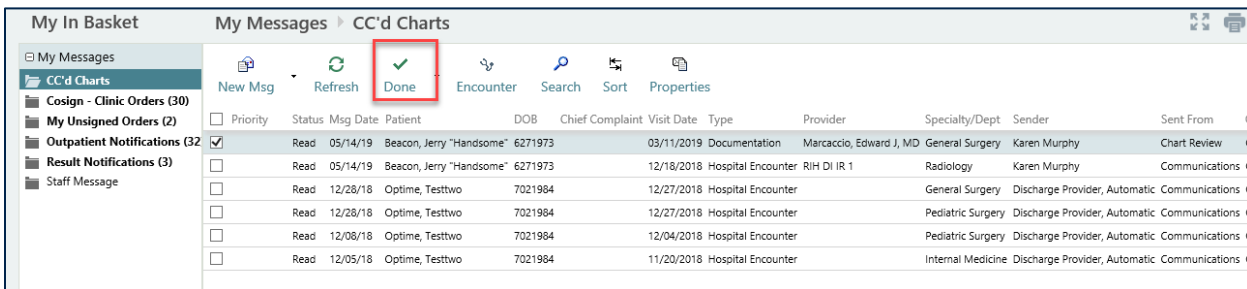
Use the Notification Preferences page (Settings > Notification Preferences) to choose which In Basket messages you want to receive email alerts about, so you stay informed about important developments with your patients.



## In Basket

Complete Messages Only If You Are Responsible For Them

Each folder will have different functionality: so you can review and complete the message. Click box next to the message and choose appropriate item to take care of the message.



In Basket allows you to review and co-sign orders for your patients.

Folders listed on left will show you what type of message are in your in basket. A number after the folder name indicates new messages, i.e., Co-Sign Clinic Orders (9).

The screenshot shows the 'My In Basket' and 'My Messages' section. On the left, there is a sidebar with 'My Messages' expanded, showing 'CC'd Charts', 'My Unsigned Orders', and 'Staff Message (1)'. The main area displays a table of messages with the following data:

Visit Date	Patient	Received Date	Encounter Type
09/30/19	Beacon, Jerry "Handsome"	10/01/2019	Community Orders
10/28/20	Radiant, Vivian	10/28/2020	Community Orders
10/01/19	Beacon, Jerry "Handsome"	10/01/2019	Community Orders
09/27/19	Beacon, Jerry "Handsome"	09/27/2019	Community Orders
09/27/19	Beacon, Jerry "Handsome"	09/27/2019	Community Orders

Clicking Done removes the information from both the in basket and Event notifications on the Home page.

The screenshot shows the 'My Messages' interface with 'Result Notifications' selected. The 'Done' button is highlighted with a red box. Below the message list, there is a navigation bar with buttons for 'Message', 'Patient Info', 'Meds/Problems', 'Vitals/Labs', 'My Last Notes', and 'Help'.

You can send messages (New Msg) and files to Brown University Health physicians while pulling in the patient's name automatically. In Basket messages do not become part of patient's permanent medical record. Brown University Health providers will receive these messages in their Community Messages folder.

The screenshot shows the message composition form with the following fields and options:

- To: [Text Field]
- Subject: [Text Field]
- Patient: [Text Field] Use Optime, Checkoutone
- Phone: [Text Field]  Call Me
- Note: [Text Area]
- Priority:
  - High
  - Routine
  - Low

You can attach other staff to your in basket to cover while away from office or as permanent attachments by using "Attach".

The screenshot shows the 'My In Basket' interface with 'My Messages' selected. The 'Attach' button is highlighted with a red box. The sidebar shows 'My Messages', 'CC'd Charts', and 'Cosign - Clinic Orders (30)'.

You will need to grant access to your in basket prior to attaching.

The screenshot shows a web interface titled "In Basket" with a sub-tab "Grant Access". Below the title bar, there are two tabs: "Attach" and "Grant Access", with "Grant Access" being the active tab. The main content area contains the heading "Grant the following users access to my In Basket" and a text input field labeled "Grant access to:". At the bottom of the interface, there are three buttons: "Return To In Basket" (with a left arrow), "Save" (with a green checkmark), and "Cancel Changes" (with a red X).

## Patient List- My Patients

Patient List shows all your patients and all your CareLink Admitted Patients.

The screenshot shows a web interface titled "Patient Lists" with a sub-tab "LifespanLink Admitted Patients (as of 1536)". Below the title bar, there are two tabs: "My Patients" and "LifespanLink Admitted Patients", with "LifespanLink Admitted Patients" being the active tab.

The All Admitted patients tab includes reports on your patient to give more details of their admission. Highlight patient name and choose the appropriate report.

To find additional reports, click on the drop-down arrow. To add new reports to the report bar, click on wrench and add them in.

The screenshot shows a report bar with several tabs: "Profile", "Req Doc", and "Due Meds". The "Due Meds" tab is selected. To the right of the tabs, there is a "Report:" label followed by a text input field containing "Due Meds". To the right of the input field, there are three icons: a dropdown arrow, a wrench, and a printer icon. The dropdown arrow and wrench icons are highlighted with red boxes.

You can find patients by locating on your My Patient List, Searching All Patients or Creating a New Patient Chart (Last resort option).

## Search All Patients

All patients with a relationship to your practice will appear in your "My Patient's" section. If you cannot locate your patient on the My Patient List, you can search the Lifespan System for that patient.

1. Click Search All Patients and
  - a. Enter Patient Name.
  - b. Enter Date of Birth.
  - c. Enter Sex.
  - d. **Plus, ONE** of the following (Last 4 of SSN, MRN or Zip Code).
  - e. Click Search.

Search My Patients
 Search All Patients ☆
 Create a New Chart

Please fill out all THREE required fields (name, sex and DOB), and any ONE recommended field (last 4 of SSN, MRN, or Zip) to gain access to a patient. Enter the name as Last, First (example: Doe, John).

**Patient Select**

Name (Last, First) **1**

Sex **2**

Birth date (mm/dd/yyyy) **3**

Last 4 digits of SSN

Patient MRN

Zip Code

**Plus 1 of the other yield sign fields**

2. If a patient is located, you will Select chart.

**Create a New Chart**  
 Create a new patient chart

**Select**  
 Select the patient and add to my list

**Cancel**  
 Go back and modify search criteria

3. Enter reason for accessing patient chart. Accept.

**Patient Select Confirmation**

To gain access to this patient/member, click the Accept button. In the "Reason" field at the bottom of the bottom of the page, please select your relationship to the patient. If none of the relationships apply, please enter a description in the "Comment" field.

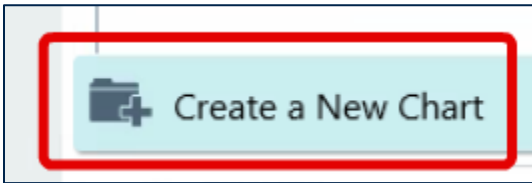
Patient Information			
Patient Name	Sex	DOB	SSN
Beacon, Karen	Female	6/29/1968	xxx-xx-6547

Patient Demographics	
Address	Phone
1122 Boogie Boogie Avenue Cranston RI 02910	401-555-1212 (Home)

Reason:  Comment:

## Creating a Chart

If you have already completed the "Search All Patients" option and cannot locate your patient, you will need to Create a New Chart. This should be done as a last resort as duplicate patient charts can lead to patient safety concerns.



1. Click Create a New Chart.
2. Enter in all patient information.
3. Click Create.

**Patient Create**

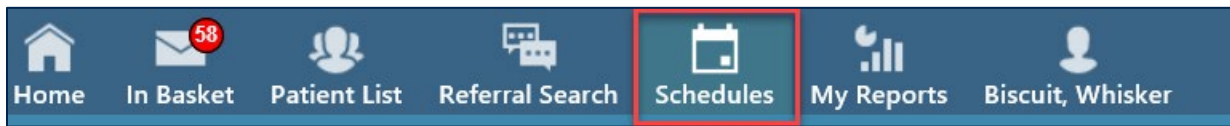
<input type="text" value="Name (Last, First):"/>	<input type="text" value="Sex:"/>
<input type="text" value="SSN:"/>	<input type="text" value="Birth date (mm/dd/yyyy):"/>
<input type="text" value="Marital Status:"/>	
<input type="text" value="Home Phone:"/>	<input type="text" value="Work Phone:"/>
<input type="text" value="Employer:"/>	<input type="text" value="Email Address:"/>

<input type="text" value="Address:"/>	<input type="text" value="City:"/>
<input type="text" value="State:"/>	<input type="text" value="Zip Code:"/>

# Schedules

## Schedules



Scheduling allows you to search for appointments for individual patients or by My Patients. The default is the next 30 days but can be modified.

## Surgery

Shows daily Surgery schedule for yourself or any provider in your practice.

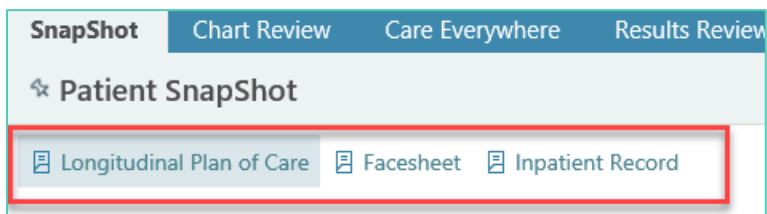
- Select surgeon from drop down list.
- Modify Start and Dates to see future or past dates.

A form for searching surgery schedules. It includes a 'Surgeon:' dropdown menu with 'SURGERY, PHYSICIAN' selected and a dropdown arrow icon (highlighted with a red box). Below it are 'Start Date:' and 'End Date:' text boxes. The 'Start Date' box contains '7/13/2018' and has a red box around the text '- week - day today + day + week'. The 'End Date' box contains '8/11/2018' and also has a red box around the text '- week - day today + day + week'.

If you cannot locate a surgeon from your practice, please contact your Site Administrator to ensure they are added to your group.

# Clinical Review

**SnapShot:** Report that shows patient current information including demographics, allergies, medications, problem list, Significant History, Immunizations, Care Team, Social Drivers of Health, Health Maintenance, recent visits. There are reports in header to find more details on patient



**Chart Review:** stores your patient's entire Lifespan medical record in folders for easy review.

- All patient information is stored in Chart Review in folders.
- Find items and click link to open more details.

**Care Everywhere:** Shows all information pulled from Care Everywhere a tool that pulls in information from outside of Lifespan providers and encounters.

**Results Review:** Allows you to review results for your patients by time frame, i.e. Data Since Last Encounter, Today's Data, Last 30 Days, Last 6 months, Last 12 months, Since conception.

**Flowsheets, Allergies, Medications, Histories, Growth Charts** show consolidated reports pertaining to the topic.

**Search Chart** allows you to find patient information quickly- it will include Care Everywhere information. An icon appears next to results from other organizations. Outside results appear only when you select the All or Care Everywhere filters.

**My Messages** > Inpatient Notifications

Admission  
**Ms. Maria J Sanchez** | MRN: 19941  
 Visit and Patient Information  
 Encounter information  
 Patient Information  
 Patient Demographics

**Donkey Denton "Kong"**  
 Male, 62 y.o., 9/25/1960  
 MRN: E1004  
 Language: Portuguese (Spoken), English (Written)  
 Search Chart  
 COVID-19 Vaccine: Unknown

Encounters Notes Media Labs Imaging Procedures Cardiology Meds Surgeries Anesthesia Other Orders Referrals

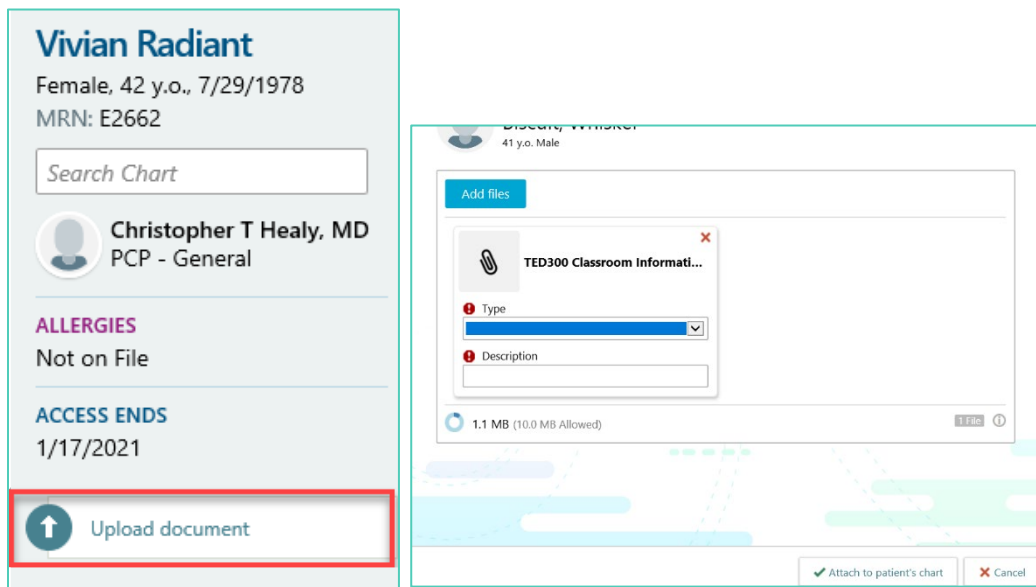
Start Review Refresh Filters Hide Canceled

Filters: Hide Canceled

Attachments	Research	Ordered	End Exam	Accession #	External?	Exam	Description	Auth Provider	Status
		10/19/2020		50010460			Stereotactic Breast Biopsy 1st Lesion Left	Christopher A Abadi, MD	Exam Begun
		09/28/2020	09/28/2020	50010397			Mammography Technical Return No Charge	Christopher A Abadi, MD	Final

# Adding Documents to Patients' Chart

1. From the patients' storyboard, Choose Upload Document.
2. Click Add Files.
3. Find file and click Accept.
4. Complete Type and Description.
5. Items can be found on Media tab in Chart Review.



# Imaging Review

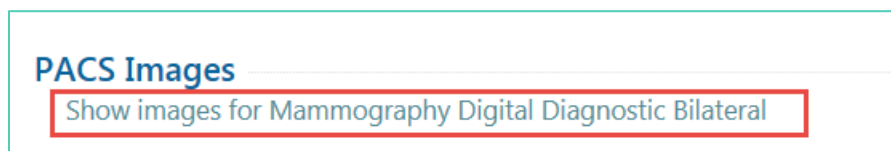
Patient's imaging results can be viewed through CareLink

1. Open Chart Review to Imaging tab, click on encounter link to open narrative of results.

The screenshot shows the 'Chart Review' interface with the 'Imaging' tab selected. The table below lists imaging results with columns for Attachments, Research, Ordered, End Exam, Accession #, External?, and Exam. The 'Ordered' column for the first row is highlighted with a red box.

Attachments	Research	Ordered	End Exam	Accession #	External?	Exam
<input type="checkbox"/>		07/30/2018	07/30/2018 1114	50008338		Mammography Digital Diagnostic Bilateral
<input type="checkbox"/>		07/30/2018		50008339		NM Myocardial Perfusion Dobutamine Stress
<input type="checkbox"/>		07/30/2018	07/30/2018 1032	50008337		CT Brain W IV Contrast
<input type="checkbox"/>		07/09/2018		50008228		US Abdomen Pelvis Vascular Study Ltd (RIH & NPH ONLY)

2. Click on PACS link to view image.



## Scans on Order 1922391

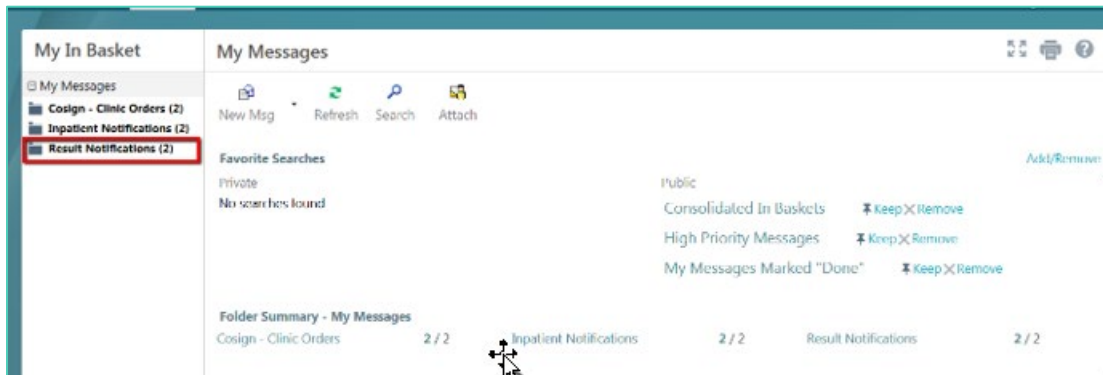
ECG Final Report - Scan on 7/13/2018 10:33 AM



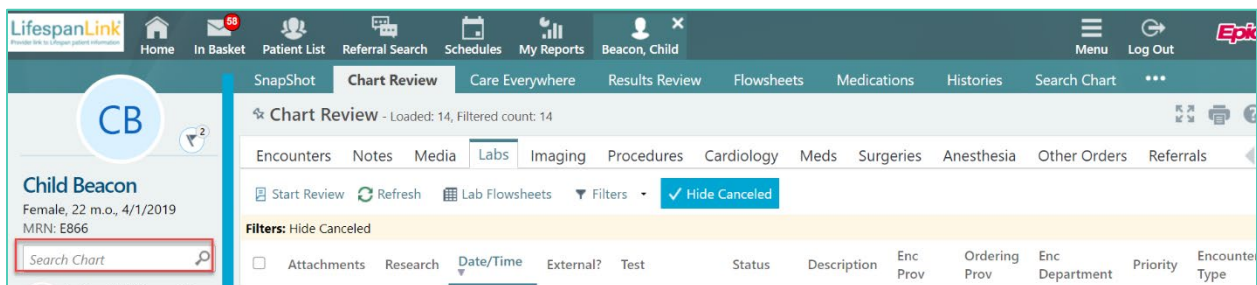
Please note that your company may have firewall settings that do not allow you to open PACS. Please check with your IT department/person to ensure that you can open program.

## Lab Review

- Any new lab result for your patient's will appear in the Event notification on your Home page if you have sent those Events to appear.
- You can find patient's results in "My In Basket" in the Result Notifications folder.



- From Patient List you can open patient's chart and review labs in Chart Review on the Labs tab or use the Search Chart feature in storyboard to find results.



- You can also access lab results from Results Review. Results Review allows you to narrow the time span of results- by choosing desired time period. You can choose the view of how you want to see data by changing the view.

Snapshot Chart Review Care Everywhere **Results Review** Flowsheets Medications Histories Search Chart

✦ Results Review Date Range Wizard

Please select a date option from the list below. To return to this page from the results display, click the 'Use Date Range Wizard' button

Set as Default

New results since time mark last set      New result view  
 Data since last encounter                      Extended view  
 Today's data    Extended view  
 Data for last 30 days                                  Extended view  
 Data for last 6 months                                Condensed view  
 Data for last 12 months                              Condensed view  
 Results since conception (pregnancy) ⚙️      Extended view

Start with date range filter enabled  
 Show this page before displaying Results Review

Accept Cancel

✦ Results Review

Hide Tree Show Ref Rng Load All Load More Time Mark Refresh Legend Options

View: Condensed View  
 Latest Data View  
 Extended View (w/o Normals)  
 Extended View  
 New Results View

Select a [ ]

Expand Collapse

Hide data prior to: 8/1/2020 Use Date Range Wizard

GROUP	COMPONENT (W/O NORMALS)	DATA	
CBC	RBC	50.00	▲ 10/23/2018 9:34:00 AM
	Hemoglobin	10.0	!- 10/23/2018 9:34:00 AM
	Hematocrit	20.0	!!- 10/23/2018 9:34:00 AM

- You can Time Mark that you have reviewed the results from the Chart by clicking Time Mark- this can also be completed from your In Basket.
- The Lab flowsheet view allows you to graph your data, or you can multi-select the labs and click Start Review to see all results together.

Chart Review ▶ **Lab Flowsheets** - Data from selected labs only.

Line Graph Bar Graph Refresh Legend Load More Show by Order

Dates in:  Columns  Rows

**Laboratory Results**

	Latest Ref Rng...	6/8/2018
Potassium	3.6 - 5.1 MEQ/L	10.0(HH)

# Placing Orders

## Placing Referral Orders

1. Select Order Entry from Menu if in patient's chart OR Place Order from home page.
2. Search for Patient or find on My Patient List, if needed.
3. Choose Authorizing Provider from list. Accept.

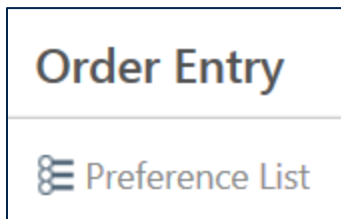
**Select Ordering Clinic**


EHS LINK Group

**Select Authorizing Provider**

Authorizing Provider:

4. Click on Preference List and choose correct referral.



5. Update order details by clicking on order to open. Complete all requested information and address all  (Additional comments can be added).

  - You have the ability to choose location/address of provider for referral if provider has multiple locations in the new location field.

**Ambulatory Referral to Cardiology**

Referral: Priority:

Reason:

To dept:

To dept spec:

To provider:

Address:

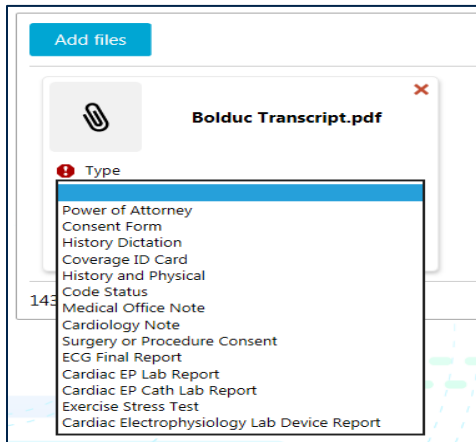
Class:

Questions:

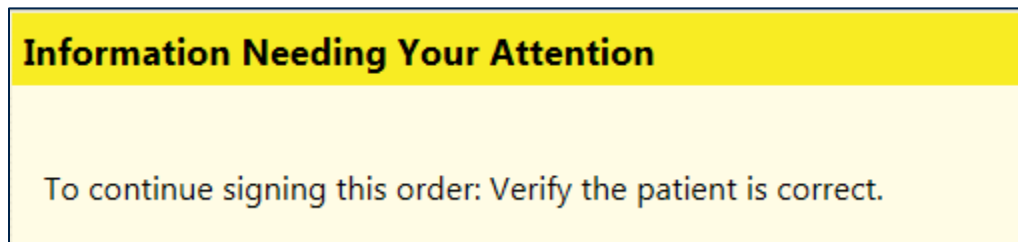
Answer	Comment
<input data-bbox="527 1829 548 1856" exclamation="" icon"="" mark="" red="" type="text" value="1. Reason for Referral &lt;img alt="/>	<input type="text"/>

- You can upload documents to the referral by using the Attached Files feature.

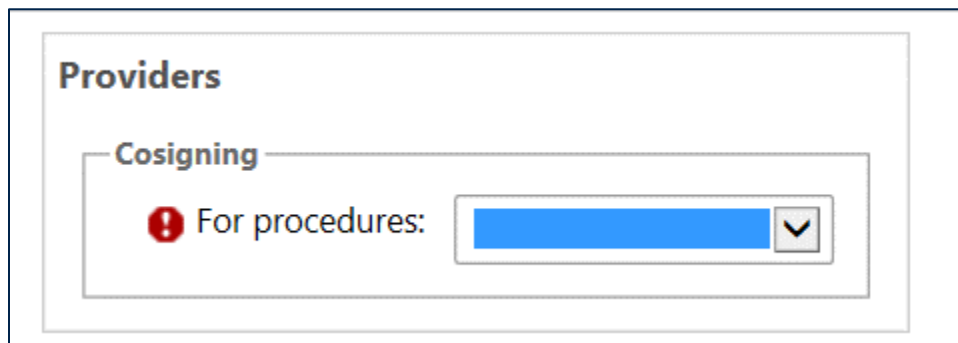
- You can label documents as the following document types:



- Accept.
- Sign Orders.
- Verify the patient is correct.



- Sign. If you are a RN, you will need to choose the Cosigning Provider for the Procedure.



- Order Review allows you to track all orders placed for all authorizing providers. You can change the time frame and narrow search to only your own orders. Appointment Status is listed next to order.

Order Review						
From: 7/20/2018		To: 7/27/2018				
Authorizing provider: Any			<input type="checkbox"/> Only my orders	Search		
View Order Report Cancel Order						
<input type="checkbox"/>	Order Name	Order Date	Order Status	Authorizing Provider	Ordering User	Appt Status
<input type="checkbox"/>	Ambulatory Referral to Bariatric Surgery	07/27/2018	Active	Christine M Duffy, MD	Nurse Epiccare Link	Appointment Needed
<input type="checkbox"/>	Ambulatory Referral to Audiology	07/26/2018	Active	Robert T Burke, MD	Nurse Epiccare Link	Appointment Needed

From Order Review you can cancel the Order easily.

View Order Report	<b>Cancel Orders</b>		
<input type="checkbox"/> Order Name	<u>Order Date</u> ▼	Order Status	Authorizing Provider
<input type="checkbox"/> Ambulatory Referral to Audiology	01/23/2019	Active	Christopher A Abadi, MD

You can now Pend Orders to save for later, you might need to pend an order if you need to review information in the patient’s chart before you finish filling out the order details.



Pended orders will appear in the Order Entry activity for you to review and complete.

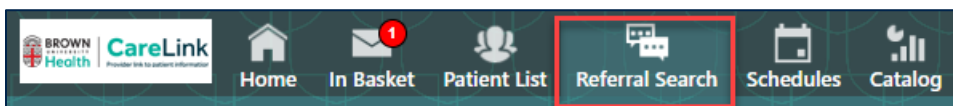
**Order Entry**

Continue Pended Orders

 Pended	<ul style="list-style-type: none"> <li>Ambulatory Referral to Burn Clinic</li> </ul>	<b>Abadi, Christopher A, MD</b> Southcoast Pended by Epiccare Link, Nurse 09/27/2019 11:48 AM	 Continue Order
 Pended	<ul style="list-style-type: none"> <li>Ambulatory Referral to Adult Partial Program</li> </ul>	Giedrimas, Arnoldas, MD Southcoast Pended by <b>Abadi, Christopher A, MD</b> 09/27/2019 11:44 AM	 Continue Order

## Referral Search

Referral Search will allow you to track status of referrals by Member or by provider.



Find more referrals in Referral Search by selecting the (none) filter to see referrals that do not have a referral status or a scheduling status.

Referral Search

Referral Type	Referred By	Referral Status	Scheduling Status
<input type="button" value="Incoming"/> <input checked="" type="button" value="Outgoing"/>	<input type="button" value="Select all"/> 1/10	<input type="button" value="Select all"/> 1/9	<input type="button" value="Select all"/> 1/19
<b>Creation Dates</b> From: <input type="text" value="7/4/2018"/> <input type="button" value="Calendar"/> To: <input type="text" value="1/4/2019"/> <input type="button" value="Calendar"/>	<ul style="list-style-type: none"> <li><input type="button" value="Arnoldas Giedrimas, MD"/></li> <li><input type="button" value="Christopher A Abadi, ..."/></li> <li><input checked="" type="button" value="David W Ashley, MD"/></li> <li><input type="button" value="Franklin Schneider, MD"/></li> <li><input type="button" value="Jennifer F Jarbeau, MD"/></li> <li><input type="button" value="Michael K Hyder, MD"/></li> <li><input type="button" value="Mitchel A Sklar, MD"/></li> <li><input type="button" value="Ramin R Davoudi, MD"/></li> <li><input type="button" value="Robert D Meringolo, ..."/></li> <li><input type="button" value="Robert H Schwenael, ..."/></li> </ul>	<ul style="list-style-type: none"> <li><input type="button" value="Authorized"/></li> <li><input type="button" value="Canceled"/></li> <li><input type="button" value="Closed"/></li> <li><input type="button" value="Denied"/></li> <li><input type="button" value="Incomplete"/></li> <li><input type="button" value="New Request"/></li> <li><input type="button" value="Open"/></li> <li><input type="button" value="Pending Review"/></li> <li><input checked="" type="button" value="(none)"/></li> </ul>	<ul style="list-style-type: none"> <li><input type="button" value="External - Ready to SC..."/></li> <li><input type="button" value="External - Some Visits..."/></li> <li><input type="button" value="Patient Refusal"/></li> <li><input type="button" value="Pending Authorization"/></li> <li><input type="button" value="Ready for Initial Sched..."/></li> <li><input type="button" value="Ready to Schedule"/></li> <li><input type="button" value="Some Visits Scheduled"/></li> <li><input type="button" value="Unable to Contact"/></li> <li><input type="button" value="Unknown"/></li> <li><input checked="" type="button" value="(none)"/></li> </ul>

## Placing Imaging Orders

1. Select Place an Order

**I want to...**

- 
-

2. Search for Patient or find on My Patient List.
3. Choose Authorizing Provider from list. Accept.

**Select Ordering Clinic**

EHS LINK Group

**Select Authorizing Provider**

Authorizing Provider:

4. Click on Preference List and choose correct imaging order.

**Order Entry**

Order Entry > Preference List

Procedures  
Care Select Link  
Referrals  
Labs

My Preferences

**Care Select Link (Procedures)**

- Abdominal Aorta Duplex (TMH ONLY)
- Arterial Duplex Lower Extremity Bilateral (TMH ONLY)
- Arterial Duplex Lower Extremity Left (TMH ONLY)
- Arterial Duplex Lower Extremity Right (TMH ONLY)
- Arterial Duplex Upper Extremity Bilateral (TMH ONLY)

5. Address all stop signs for location and reason for procedure.

Arterial Duplex Lower Extremity Bilateral (TMH ONLY)

Status: Normal Standing **Future**

Expected Date:   Approx.

Comment:

Expires: 2/1/2022

Priority: Routine [6] **Routine** STAT

Class: Ancillary Performed [44] **Ancillary Pe...** Hospital Per...

Questions:

	Answer	Comment
1. Which location is preferred for the procedure?	<input type="text"/>	<input type="text"/>
2. Reason for Procedure	<input type="text"/>	<input type="text"/>
3. Release to patient	Immediate	

Accept Cancel

6. Address Release to Patient- you can choose immediate release or manual. If manual, you will need to explain reason for delay

Questions:

	Answer	Comment
1. Which location is preferred for the procedure?	The Miriam Hospital	<input type="text"/>
2. Reason for Procedure	Cerebral Arteritis	<input type="text"/>
3. Release to patient	Manual release only	
Reason for preventing immediate release	<input type="text"/>	
Additional details for preventing immediate release	<input type="text"/>	

Title	Number
Non-release to MyLifespan request by patient	102
Risk of physical harm to patient	100
Risk of psychiatric distress to patient	101

7. Accept.
8. Sign Orders.
9. Verify the patient is correct, Click. Sign Orders.

### Information Needing Your Attention

To continue signing this order: Verify the patient is correct.

10. Sign.
  - If you are a RN, you will need to choose the Cosigning Provider for the Procedure.

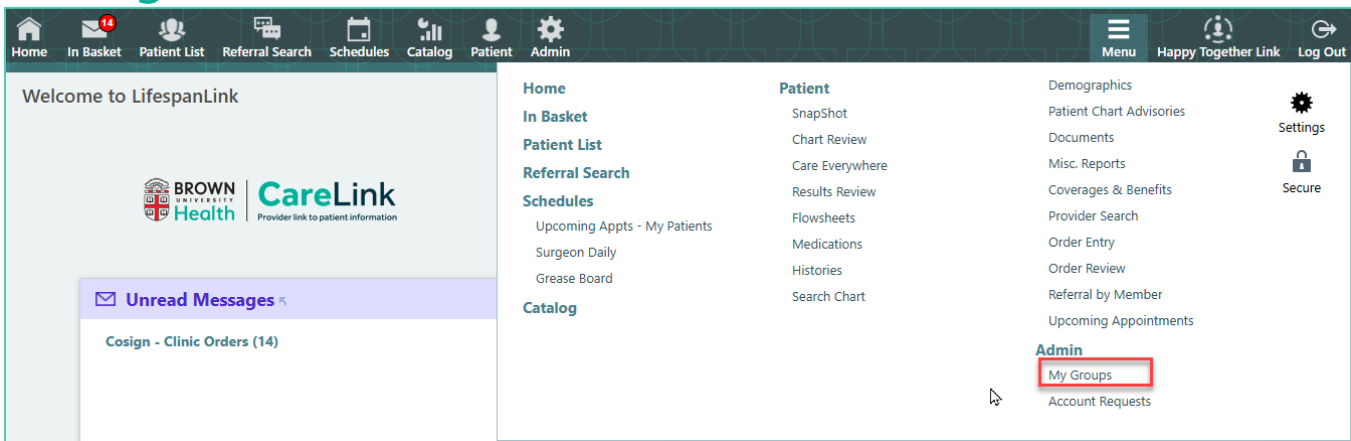
#### Providers

**Cosigning**

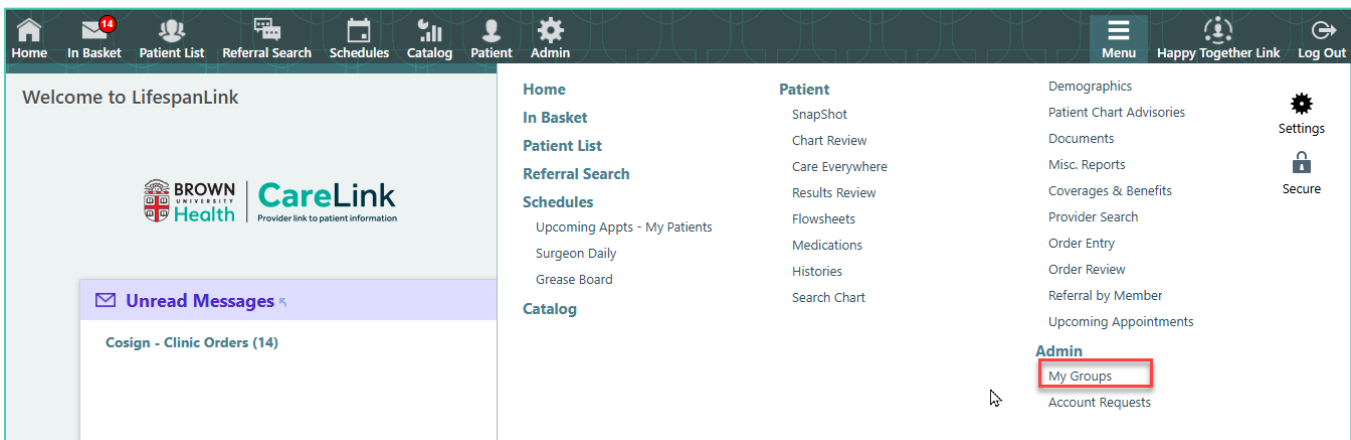
ⓘ For procedures:  ▼

# CareLink Site Administrator

## Manage Your Clinic



Use the buttons for each user to change their password or deactivate their account (2) and see whether a user's account is blocked (3).



Use the buttons for each user to change their password or deactivate their account (2) and see whether a user's account is blocked (3).

## Broadcast Message

To help new users get access to the web application more quickly, you can now set an initial password for new user accounts you request. When the account is created, a message appears on the home page the next time you log in. Click the link to open the message in In Basket, which contains the User ID and a link to set an initial password in My Groups.

You can also open My Groups any time to view the full list of users that need an initial password set. The Set Initial Password prompt appears only if users need an initial password set. Click on a user to open the Change Password window and set an initial password.

**Message**

A new account has been created for Jason Escher.

---

**Next Steps:**

1. [Set Temporary Password](#)
2. Let the user know they can log in with their User ID and temporary password  
User ID: **30903**

The first time a user logs in they will be required to set their own password.

**Set Initial Password**

Set the initial password for these users and let them know they can log in with their User ID and initial password. The first time a user logs in they will be required to set their own password.

- Escher, Jason
- Montez, Jaclyn
- Stewart, Felicity

## Changing User Password

Providers now can change their own passwords.

1. Open My Groups
2. Check password button next to user you want to change.
3. Enter in New Password and verify.
4. Enter your password in “Password for Site Administrator.”
5. Notify provider of temporary password.
6. When provider logs in they will be prompted to change their password.

Provider	Email	Last Login	
Yes			ⓘ
No		10/5/2020 11:26 AM	ⓘ
No		9/14/2020 10:54 AM	ⓘ
		10/5/2020 9:01 AM	ⓘ
		10/1/2020 8:59 PM	ⓘ
		7/16/2020 8:31 AM	ⓘ
		9/1/2020 12:56 PM	ⓘ
Yes			ⓘ
Yes			ⓘ

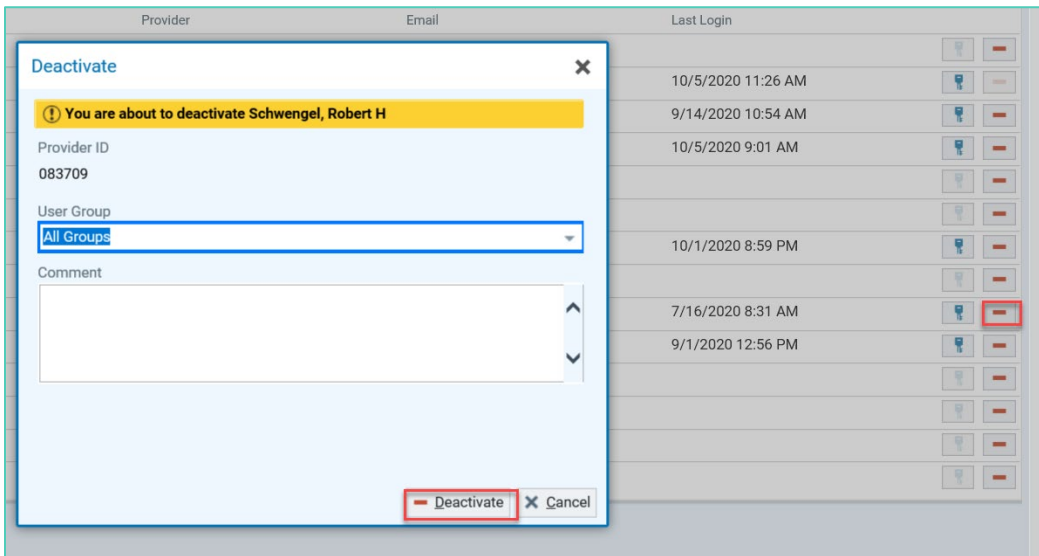
**Change Password for INPATIENT, ATTENDING PHYSICIAN** ✕

New Password Verify New Password

Password for EPICCARE LINK LIP, SITE ADM...

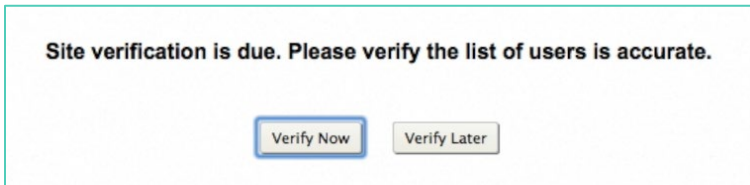
## Deactivating a User

1. Open My Groups.
2. Check “-” button of user you want to deactivate.
3. Click “Deactivate.”

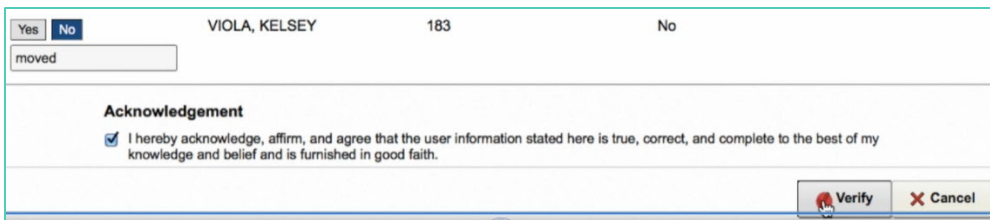


## Validating Enrollment

On a regular basis, the Site Administrator will receive a request to complete site verification.

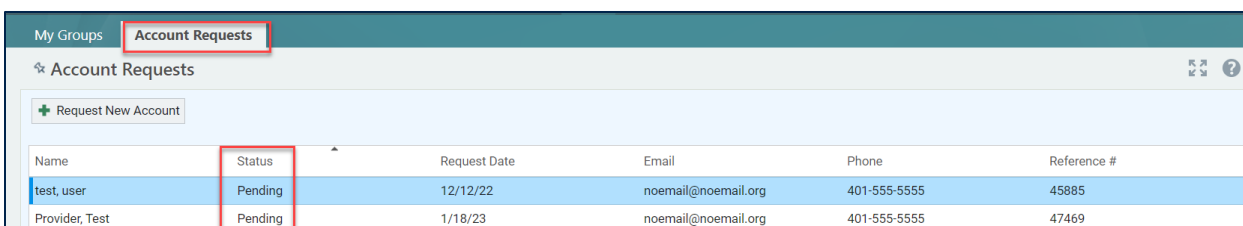


1. Review staff list and update with any information on providers that are no longer employed with your clinic.
2. Choose No if employee is no longer employed.
3. Enter comment.
4. Address Acknowledgement.
5. Click Verify.



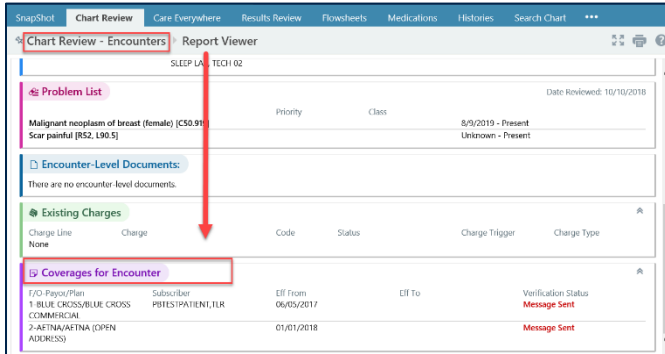
## Account Requests

Use the account request tab to check the status of a new account.



# Encounter Coverages

1. Open Chart Review for patient.
2. Go to Encounter Tab and open the report.
3. Scroll down to Coverages for Encounter Section.



## Support

If you have questions regarding CareLink please call the Help Desk at 401-444-6381.