BROWN UNIVERSITY Health | LifeChart
One patient. One record. One system.

CARELINK USER GUIDE

Table of Contents

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 Adminstrators for New Accounts

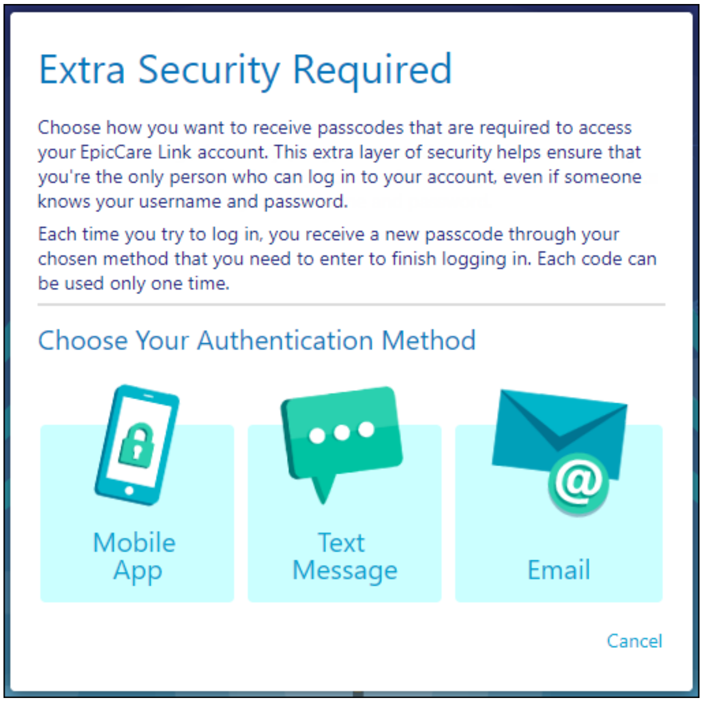
Let site administrators know they will now receive broadcast messages with info for new accounts they requested, and they can set initial passwords for new accounts in My Groups. See Site Admin Section for more details.

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.

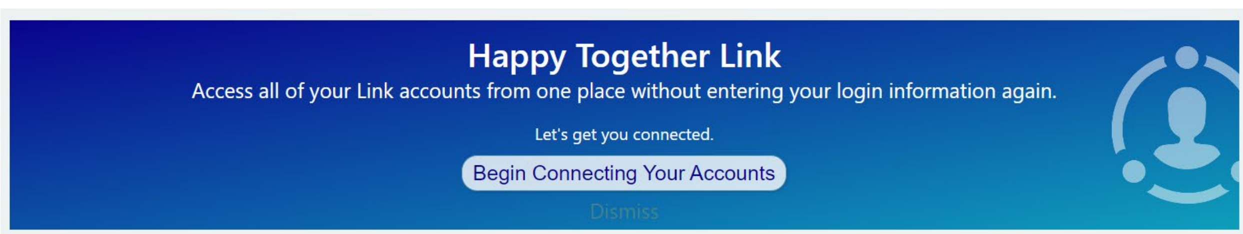
Multifactor Authentication

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.

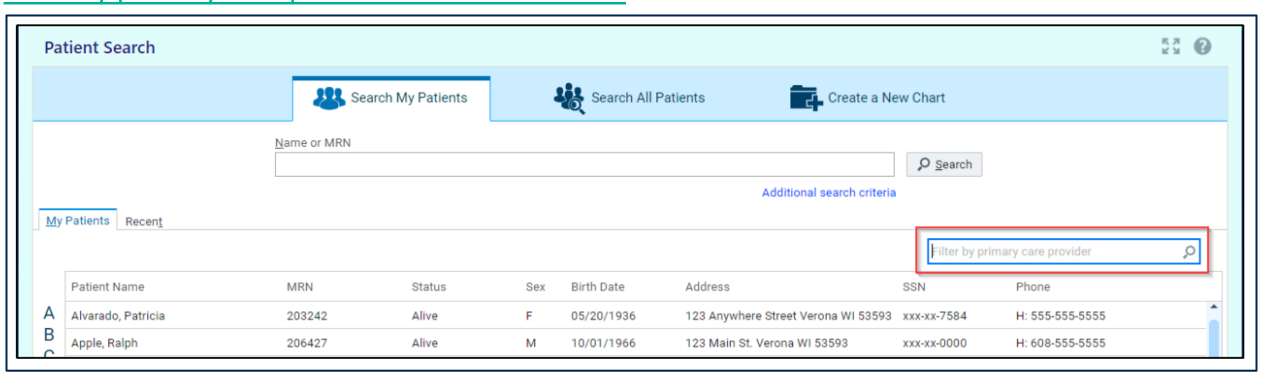


Happy Together

You can link all your Link accounts utilizing Happy Together.

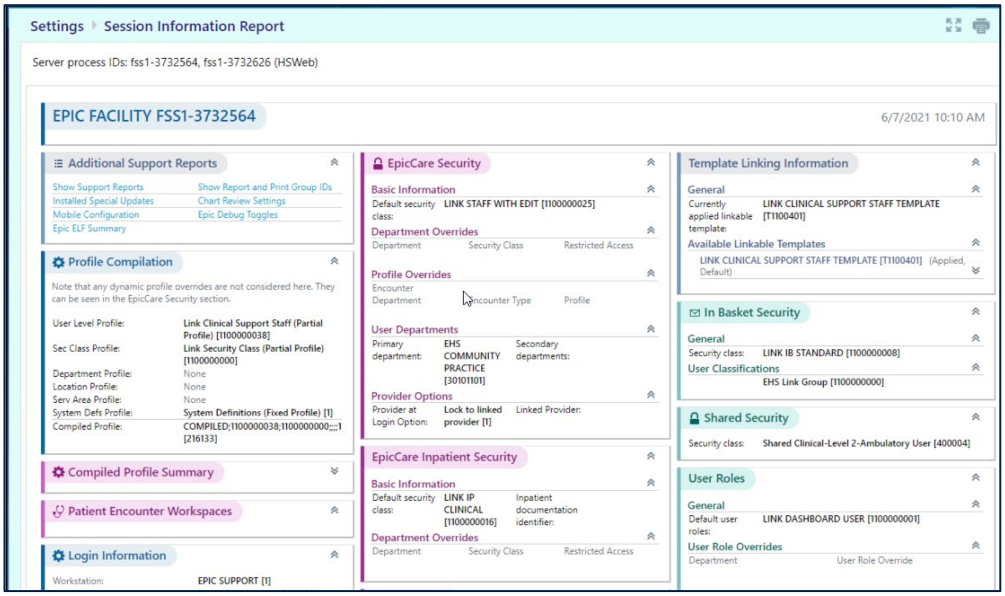


Filter by primary care provider in Patient Search



Better Troubleshooting with Session Information Report

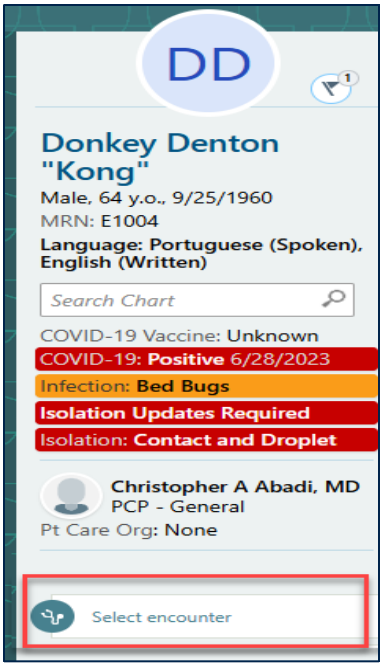
support is likely to ask you for, like your compiled profile. To view the report, go to the **Settings** page and click **Session Information Report**.


Settings Session Information Report
Server process IDs: fss1-3732564, fss1-3732626 (HSWeb)
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) [1100000038]
Sec Class Profile: Link Security Class (Partial Profile) [1100000000]
Department Profile: None
Location Profile: None
Serv Area Profile: None
System Defs Profile: System Definitions (Fixed Profile) [1]
Compiled Profile: COMPILED;1100000038;1100000000;;;1 [216133]
Compiled Profile Summary
Patient Encounter Workspaces
Login Information
Workstation: EPIC SUPPORT [1]
EpicCare Security
Basic Information
Default security class: LINK STAFF WITH EDIT [1100000025]
Department Overrides
Department Security Class Restricted Access
Profile Overrides
Encounter Department Encounter Type Profile
User Departments
Primary department: EHS COMMUNITY PRACTICE [30101101]
Secondary departments:
Provider Options
Provider at Login Option: Lock to linked provider [1]
Linked Provider:
EpicCare Inpatient Security
Basic Information
Default security class: LINK IP CLINICAL [1100000016]
Inpatient documentation identifier:
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 [1100000008]
User Classifications
EHS Link Group [1100000000]
Shared Security
Security class: Shared Clinical-Level 2-Ambulatory User [400004]
User Roles
General
Default user roles: LINK DASHBOARD USER [1100000001]
User Role Overrides
Department User Role Override

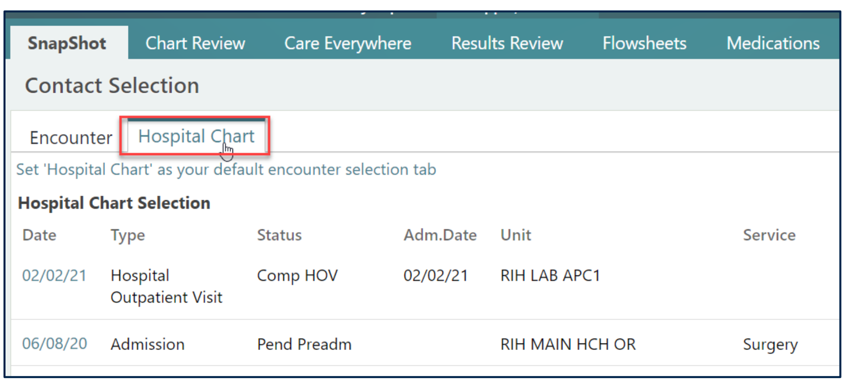
CareLink Features

Patient Summary Tab

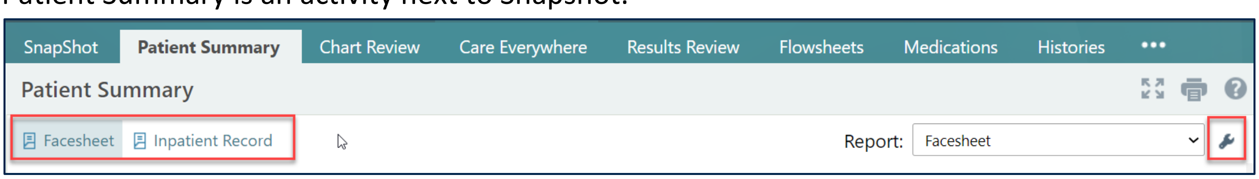
1. Open patient's chart.
2. Click on Select Encounter in the patient's storyboard.



3. Go to Hospital Chart tab and open encounter.

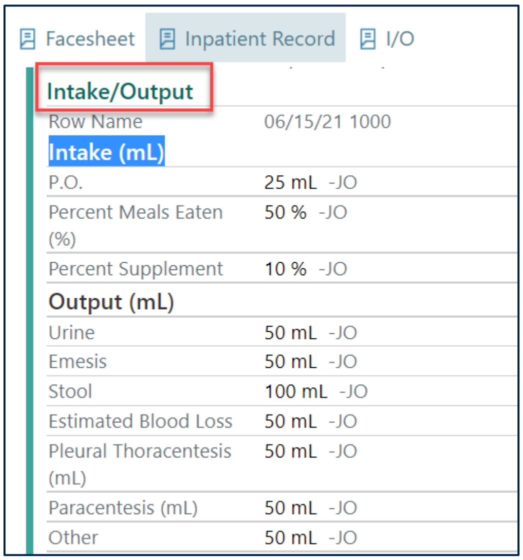


4. Patient Summary is an activity next to Snapshot.

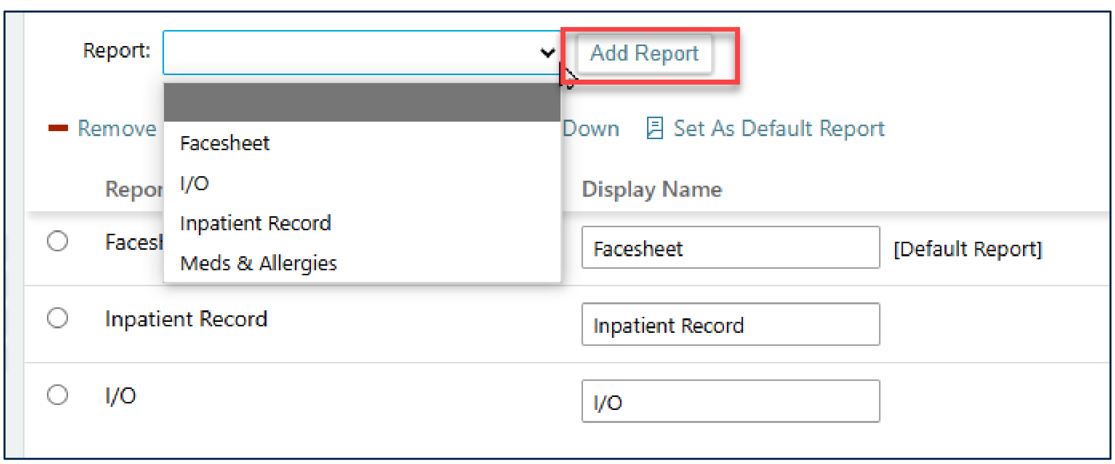


5. Default reports of Facesheet and Inpatient Record are viewable.
    a. Facesheet

b. Inpatient Record

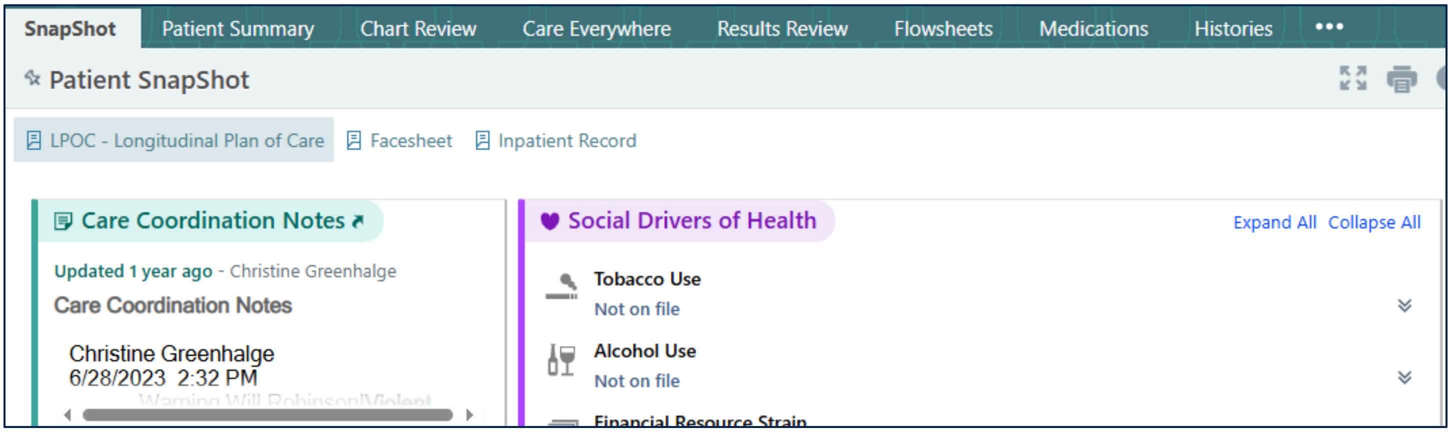


6. Add more reports by clicking on wrench. Click Add Report. Rearranged as needed.



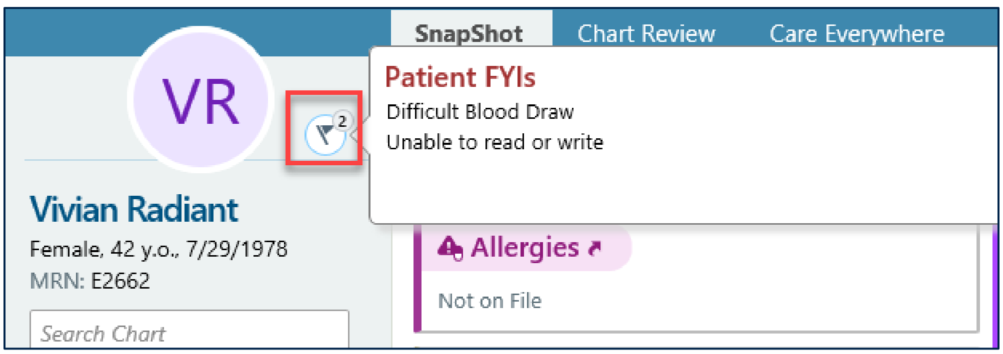
Social Drivers of Health

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.



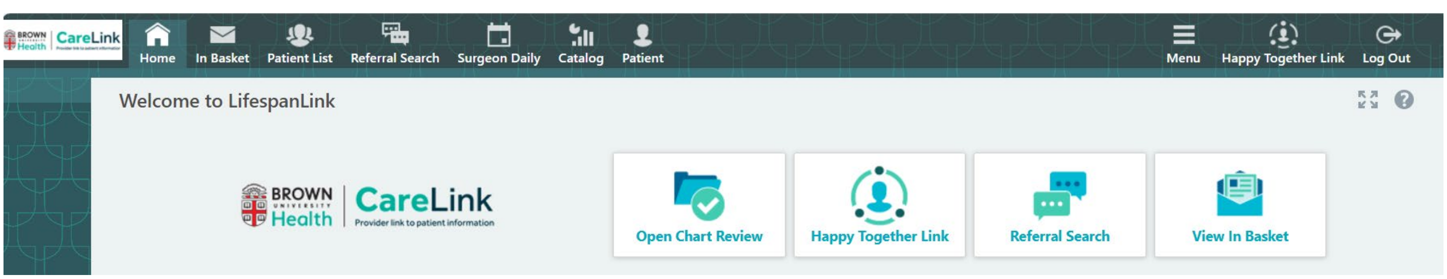
Patient Flags

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.

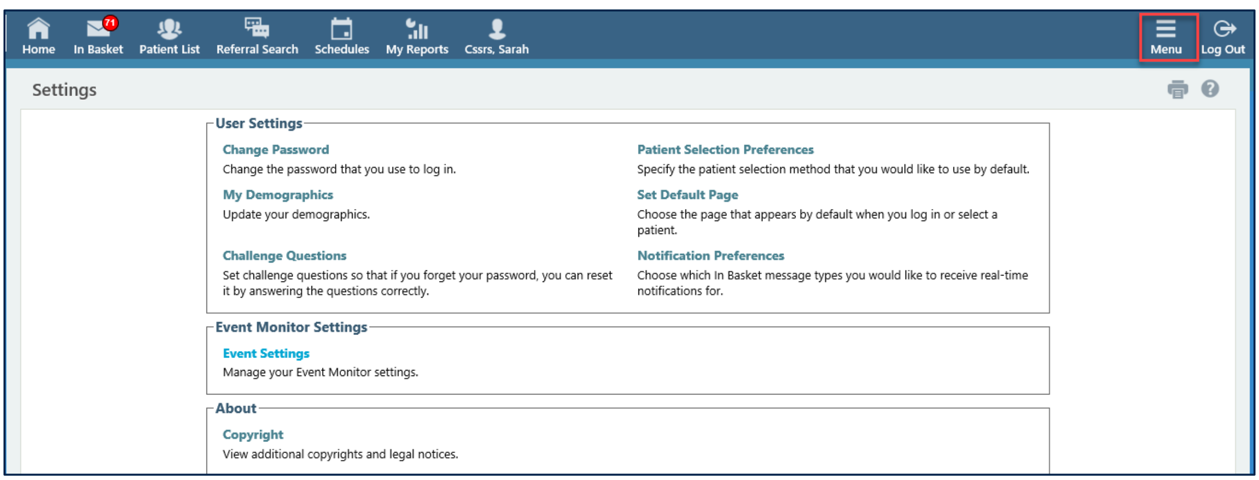
Reporting shows all reports you have access to view.

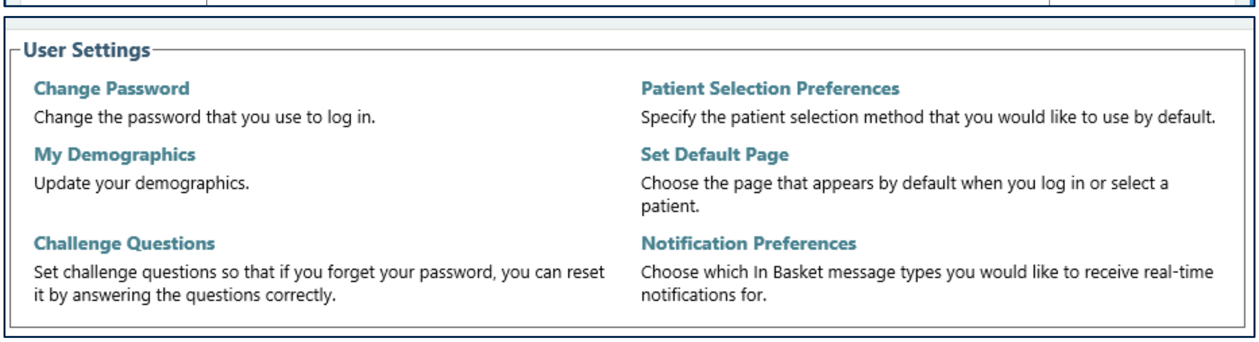
Patient allows you to search for any patient with Lifespan medical record (this should only be done only for patients in your care).

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.



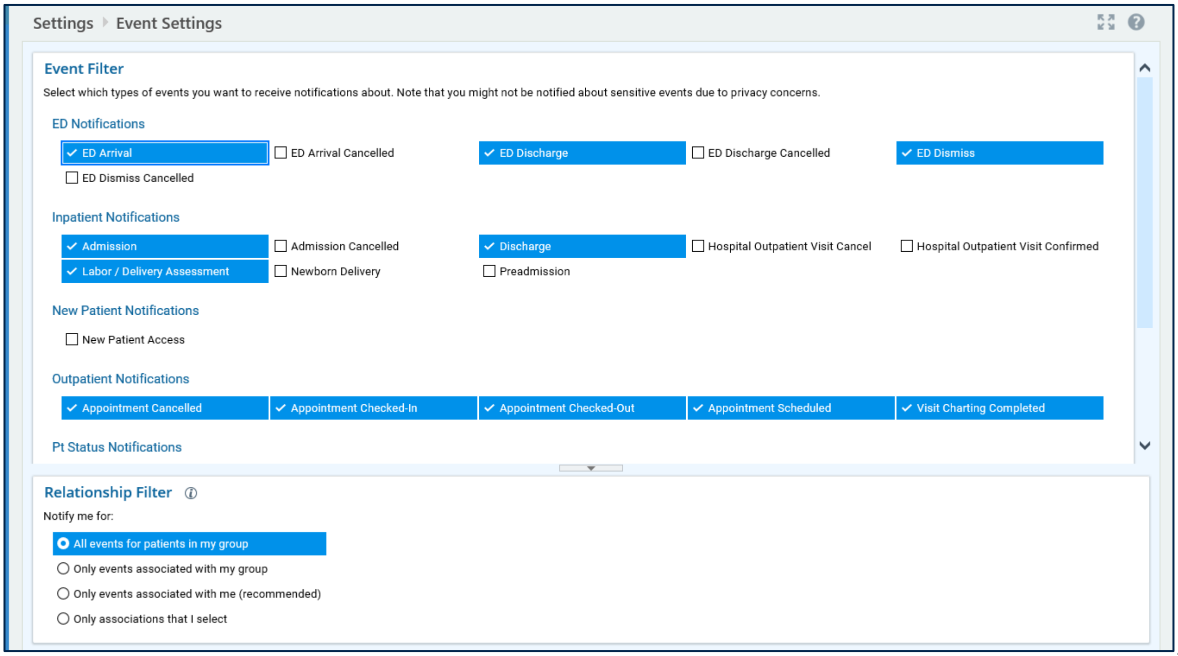


Update Event Settings

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.

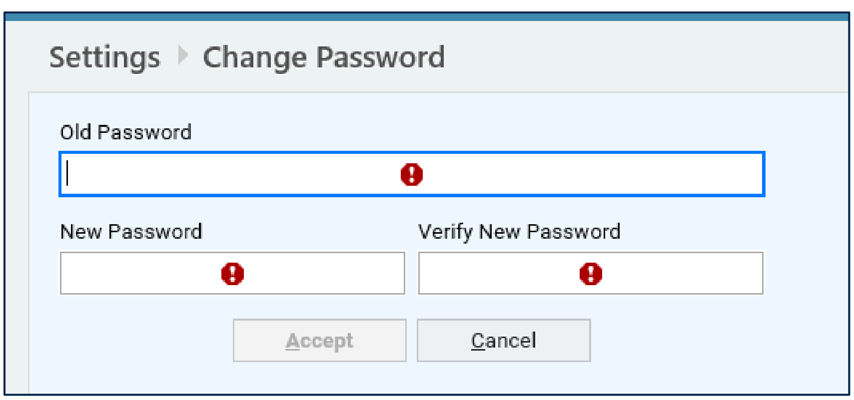
1. On home page click on the Menu shortcut and click on Settings.
2. Choose Event Settings.
3. Check the boxes next to the items you want to receive. Accept.



Add Information here.

Resetting a Password

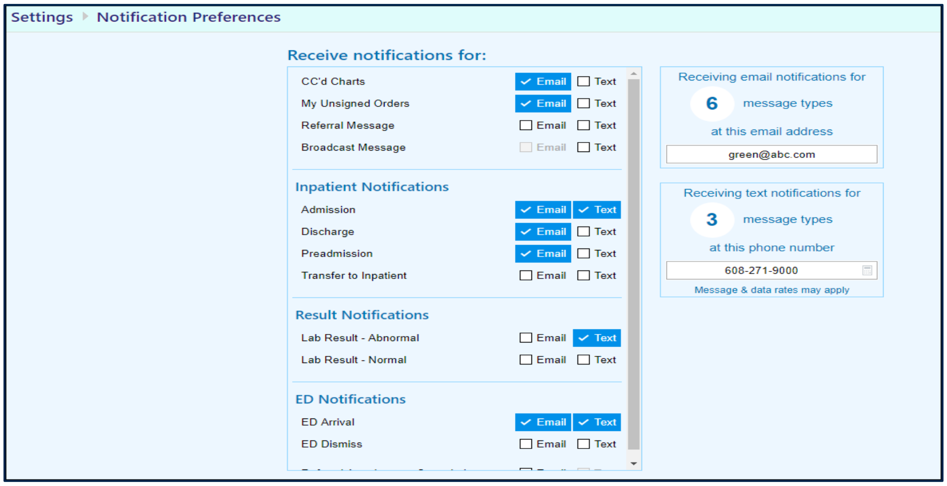
Change your own password so you don't have to contact an administrator to do so. It's best to change your password at regular intervals for security reasons.



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.

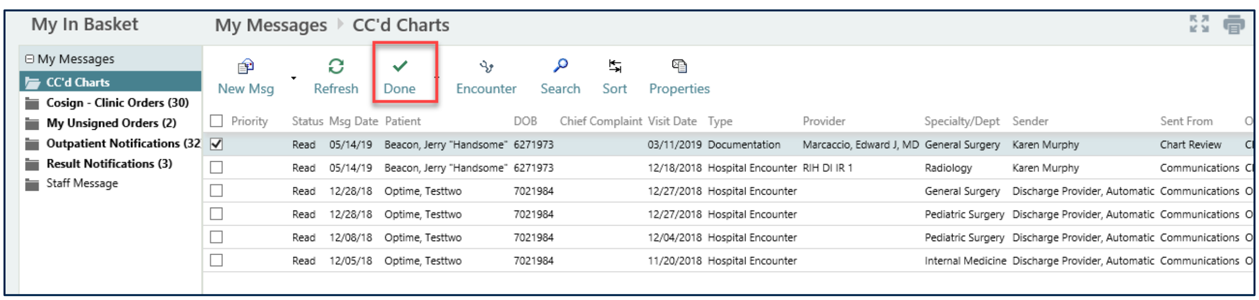
Use the Notification Preferences page (Settings > Notification Preferences) to choose which In Basket messages you want to receive email alerts about, so you stay informed about important developments with your patients.

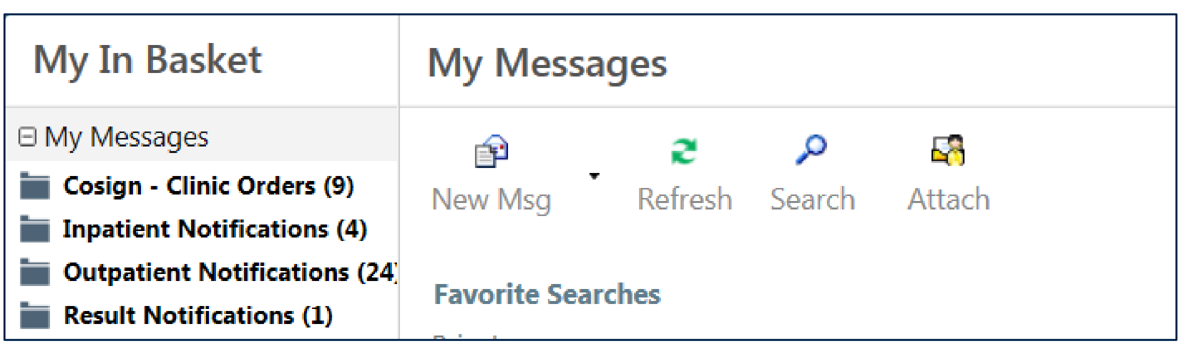


In Basket

Complete Messages Only If You Are Responsible For Them

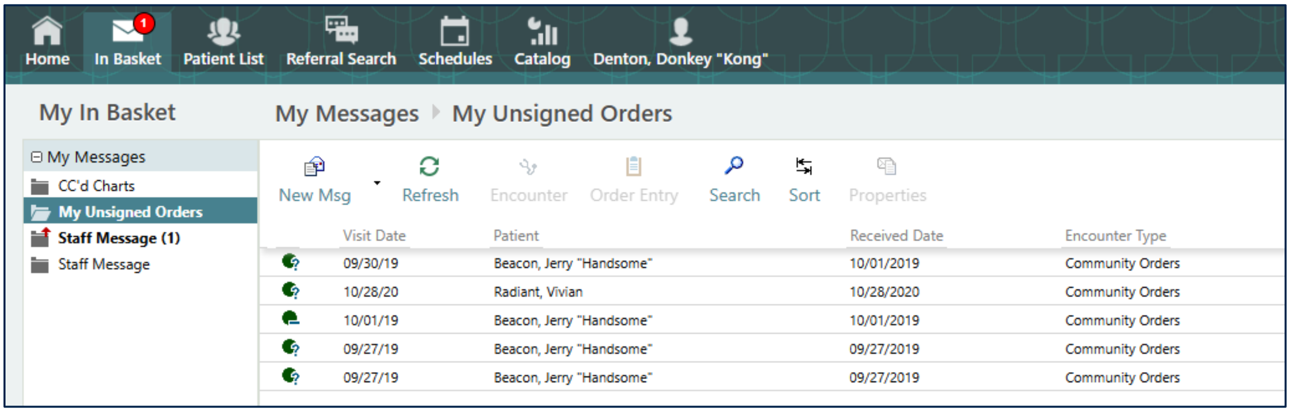
Each folder will have different functionality: so you can review and complete the message. Click box next to the message and choose appropriate item to take care of the message.



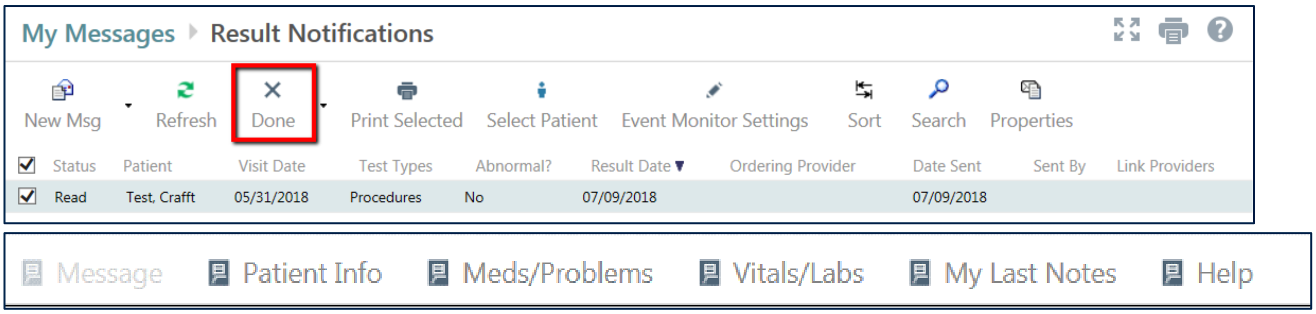


In Basket allows you to review and co-sign orders for your patients.

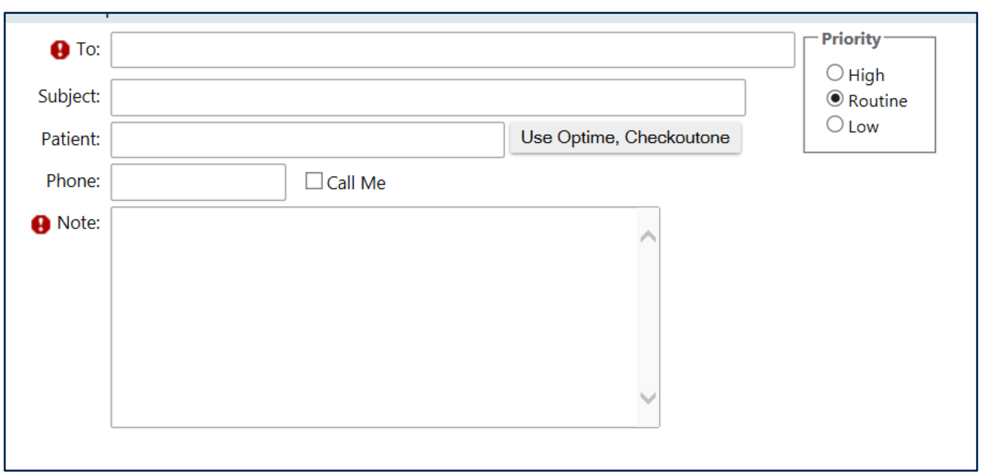
Folders listed on left will show you what type of message are in your in basket. A number after the folder name indicates new messages, i.e., Co-Sign Clinic Orders (9).



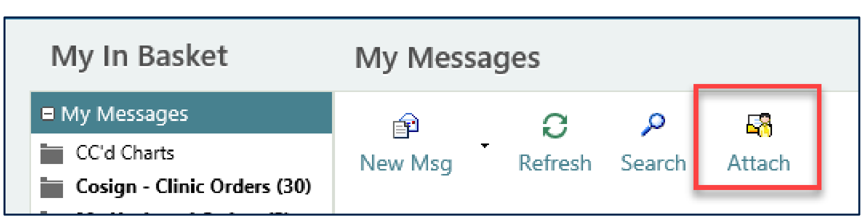
Clicking Done removes the information from both the in basket and Event notifications on the Home page.



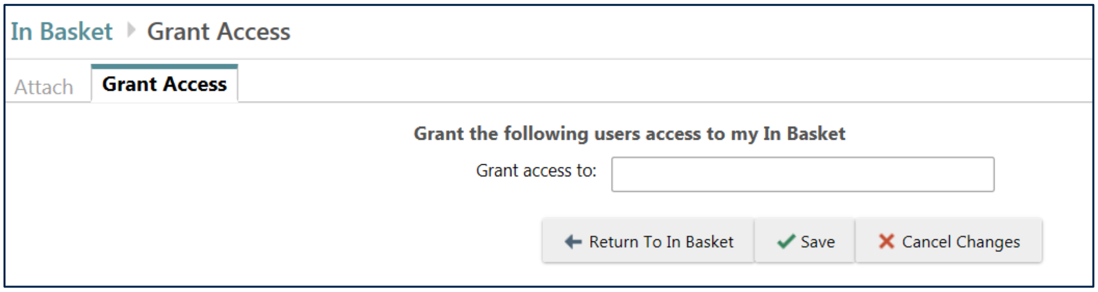
You can send messages (New Msg) and files to Brown University Health physicians while pulling in the patient's name automatically. In Basket messages do not become part of patient's permanent medical record. Brown University Health providers will receive these messages in their Community Messages folder.



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

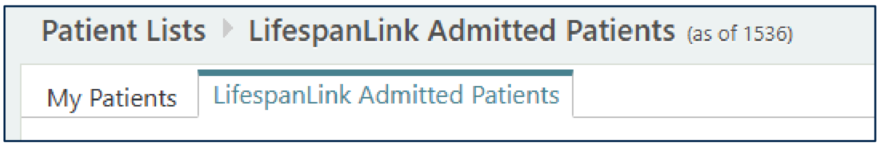


You will need to grant access to your in basket prior to attaching.



Patient List- My Patients

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



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.

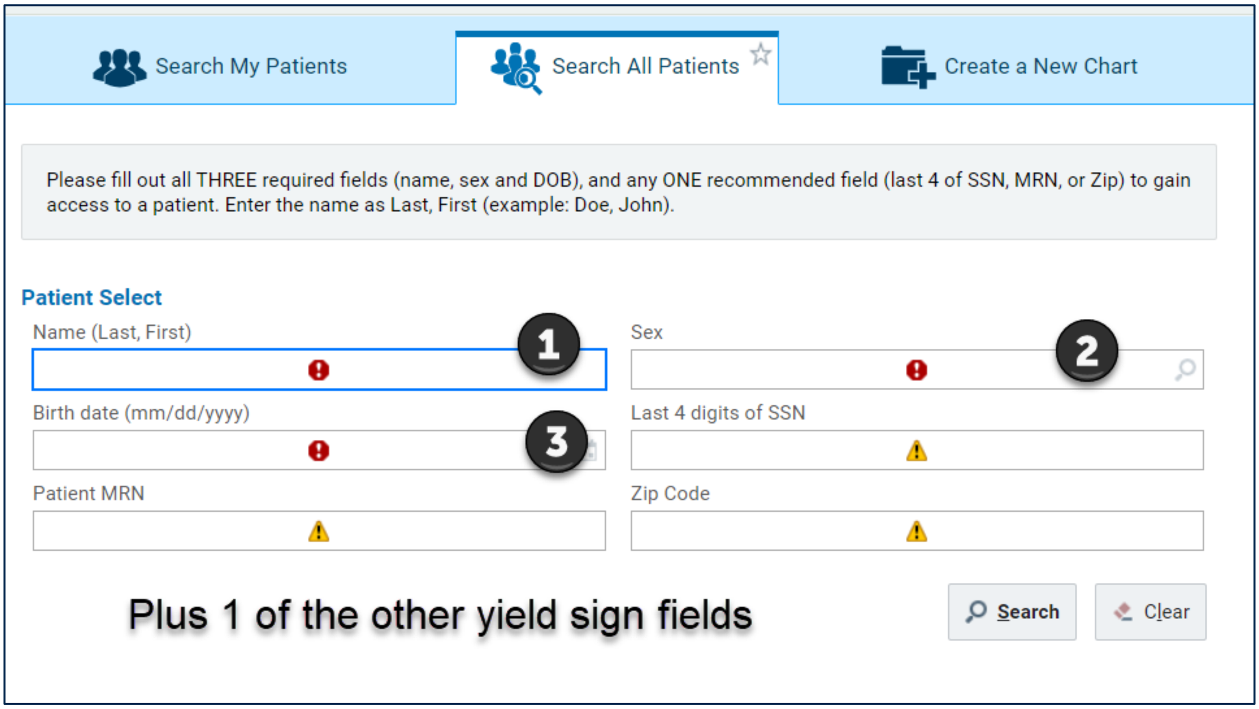
To find additional reports, click on the drop-down arrow. To add new reports to the report bar, click on wrench and add them in.

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

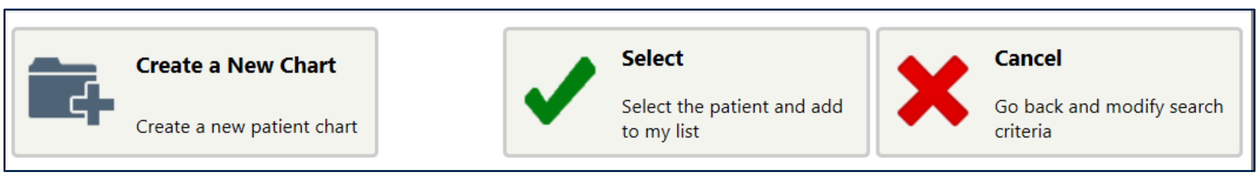
Search All Patients

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.

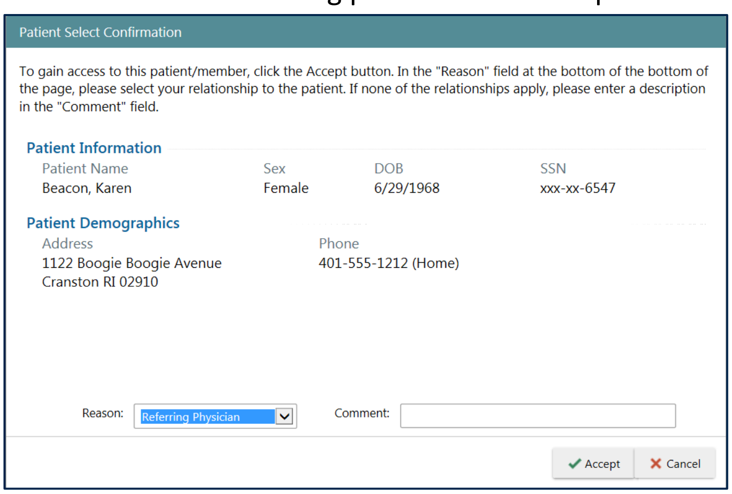
1. Click Search All Patients and
   a. Enter Patient Name.
   b. Enter Date of Birth.
   c. Enter Sex.
   d. Plus, ONE of the following (Last 4 of SSN, MRN or Zip Code).
   e. Click Search.



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



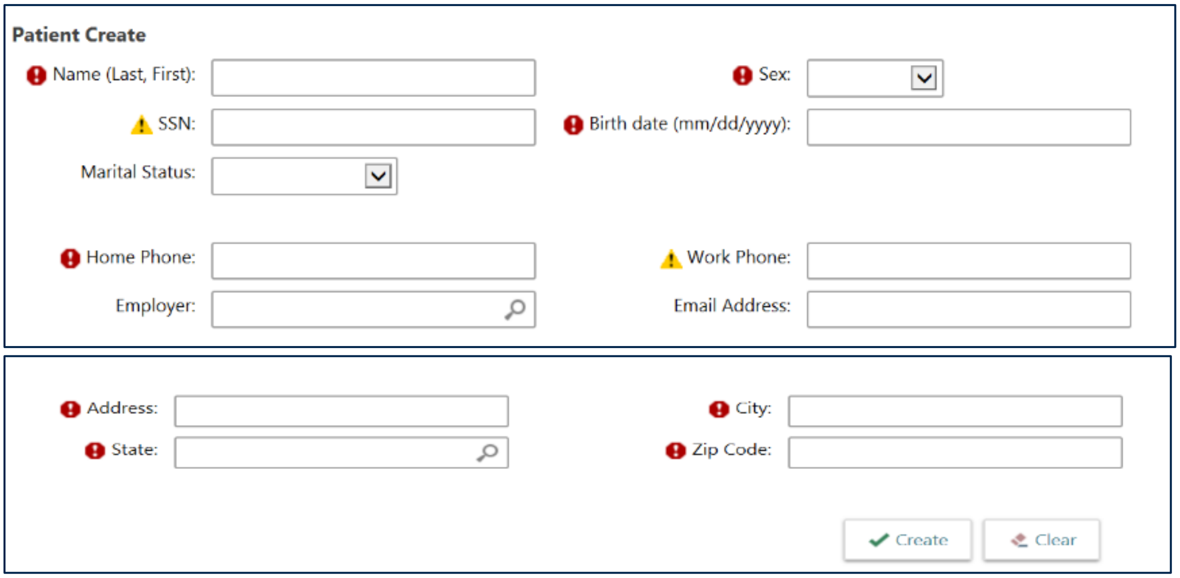
3. Enter reason for accessing patient chart. Accept.



Creating a Chart

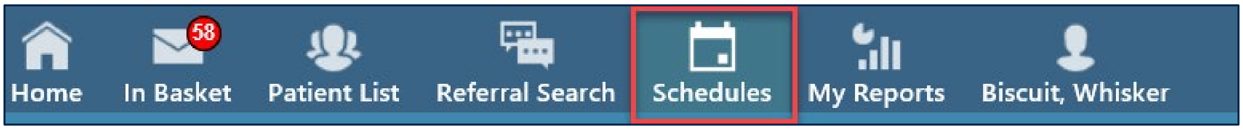
If you have already completed the "Search All Patients" option and cannot locate your patient, you will need to Create a New Chart. This should be done as a last resort as duplicate patient charts can lead to patient safety concerns.

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



Schedules

Schedules

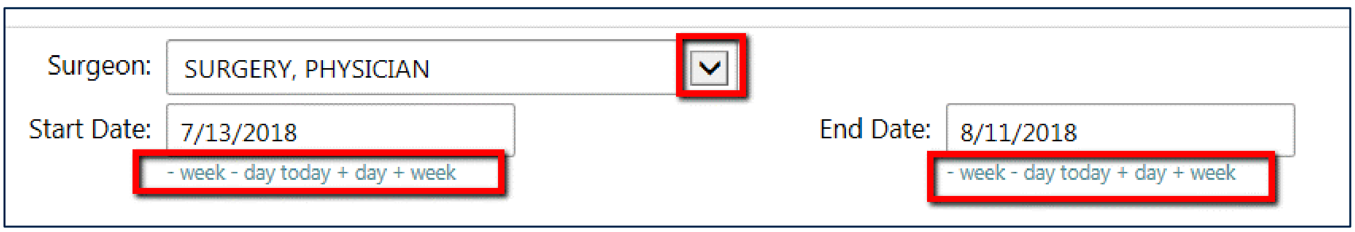


Scheduling allows you to search for appointments for individual patients or by My Patients. The default is the next 30 days but can be modified.

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.



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

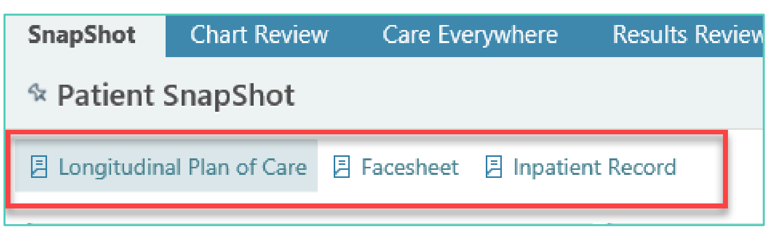


Chart Review: stores your patient's entire Lifespan medical record in folders for easy review.

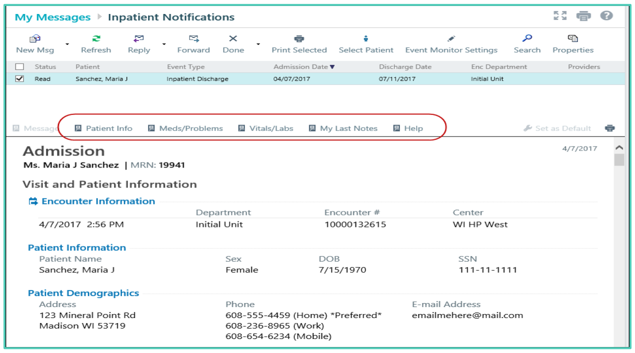
- All patient information is stored in Chart Review in folders.
- Find items and click link to open more details.

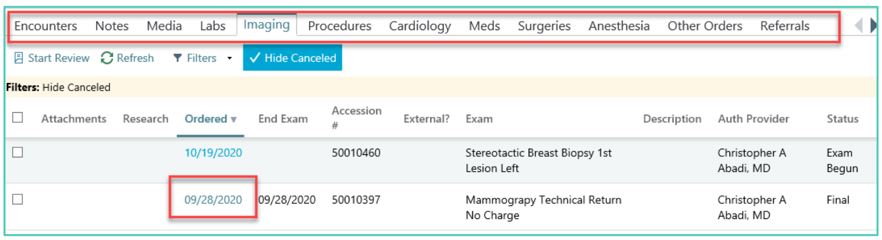
Care Everywhere: Shows all information pulled from Care Everywhere a tool that pulls in information from outside of Lifespan providers and encounters.

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.

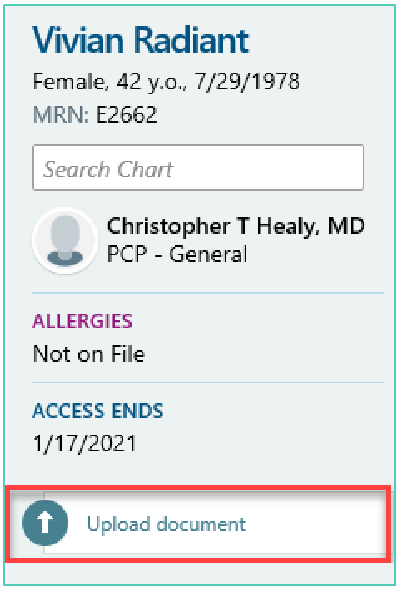
Search Chart allows you to find patient information quickly- it will include Care Everywhere information. An icon appears next to results from other organizations. Outside results appear only when you select the All or Care Everywhere filters.

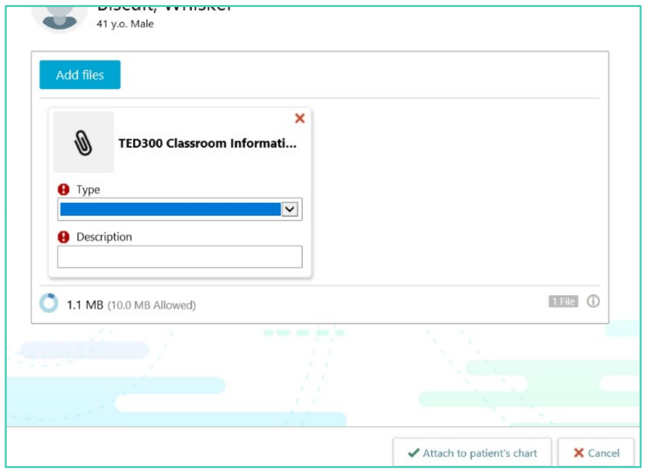




Adding Documents to Patients' Chart

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.

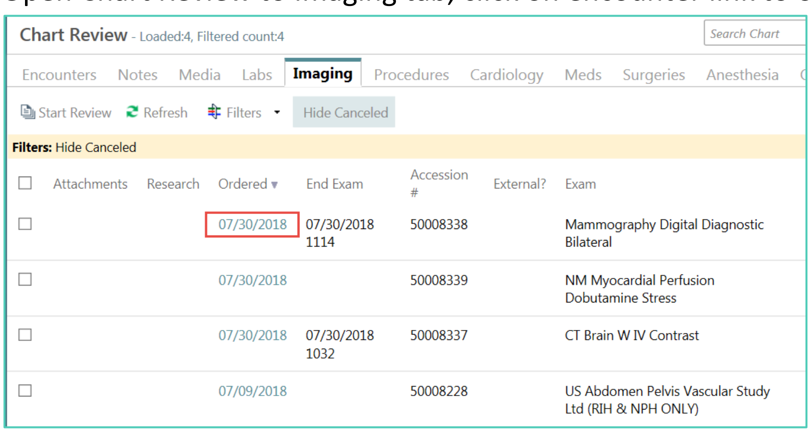




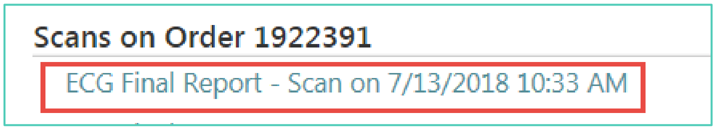
Imaging Review

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.



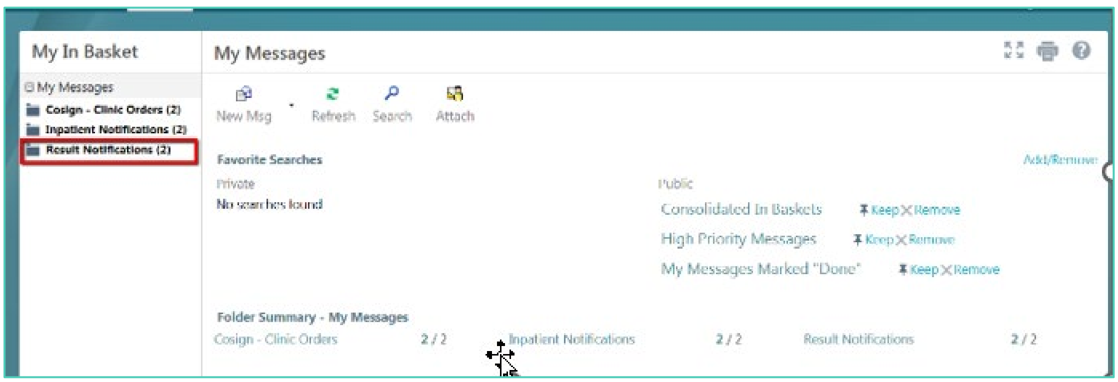
2. Click on PACS link to view image.



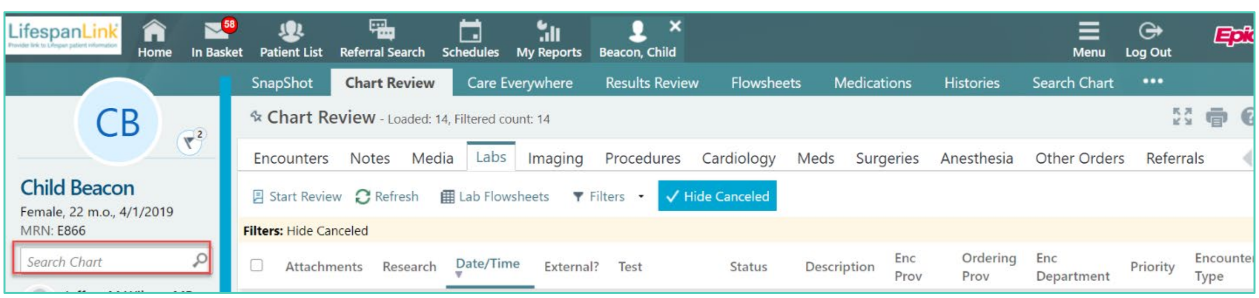
Please note that your company may have firewall settings that do not allow you to open PACS. Please check with your IT department/person to ensure that you can open program.

Lab Review

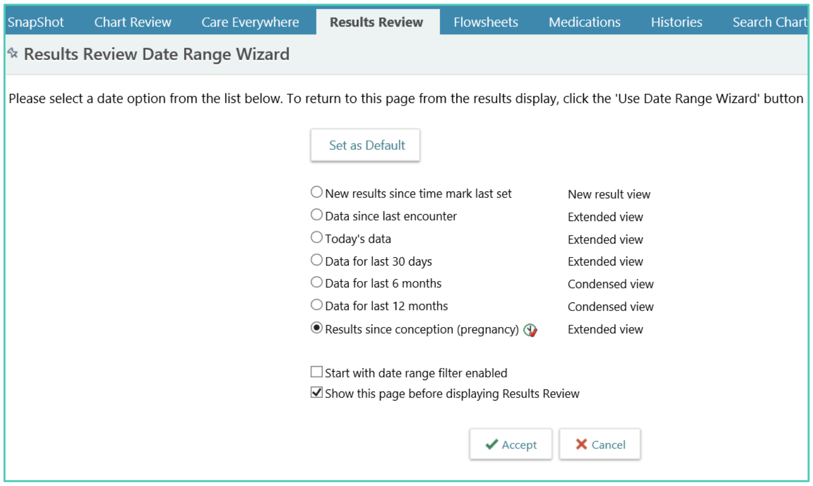
- Any new lab result for your patient's will appear in the Event notification on your Home page if you have sent those Events to appear.
- You can find patient's results in "My In Basket" in the Result Notifications folder.

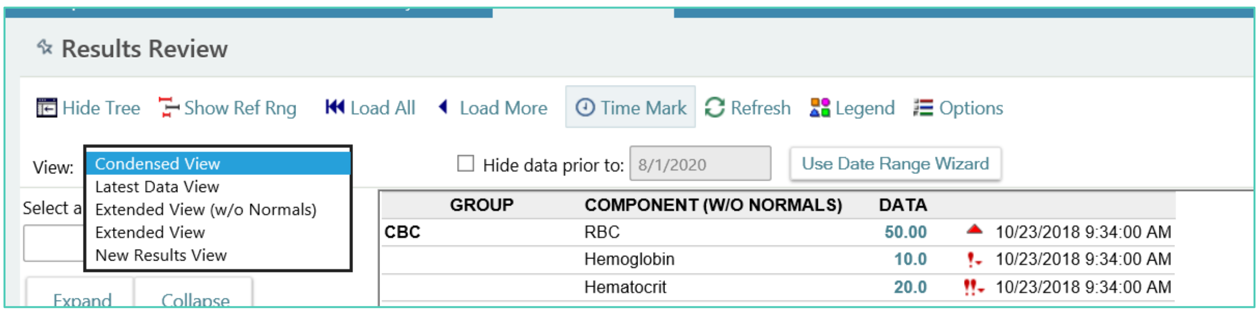


- From Patient List you can open patient's chart and review labs in Chart Review on the Labs tab or use the Search Chart feature in storyboard to find results.



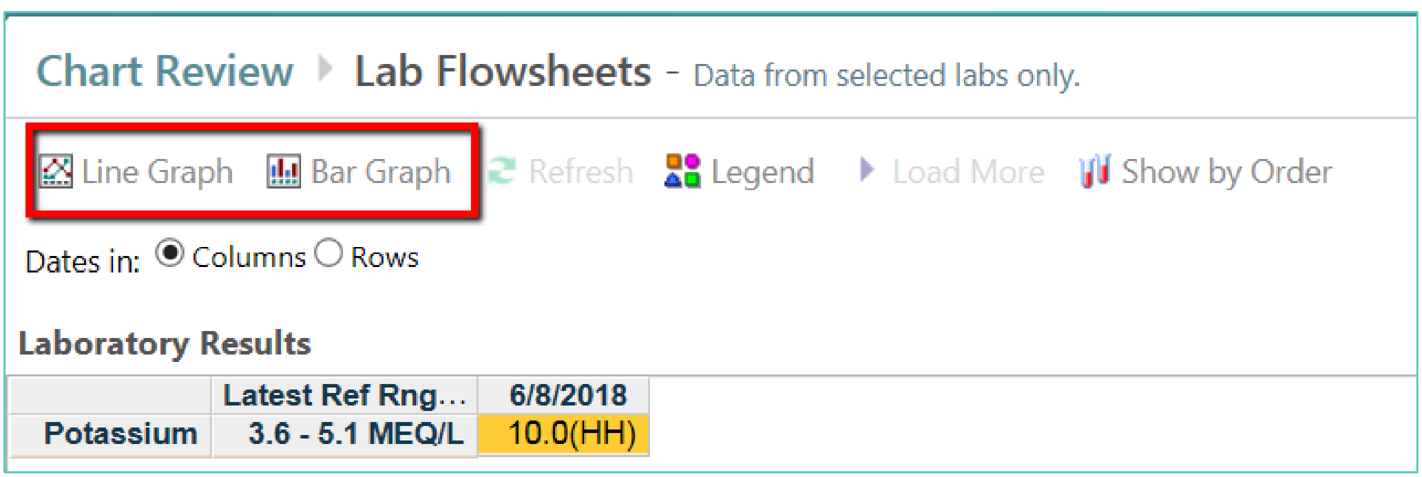
- You can also access lab results from Results Review. Results Review allows you to narrow the time span of results- by choosing desired time period. You can choose the view of how you want to see data by changing the view.





- 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.

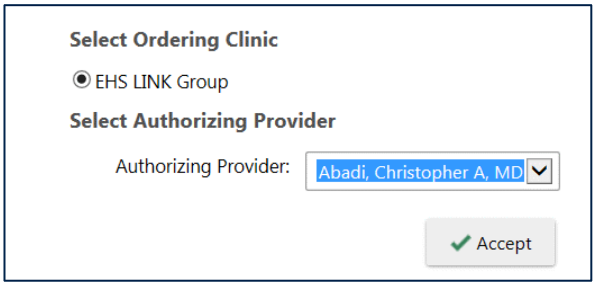
- The Lab flowsheet view allows you to graph your data, or you can multi-select the labs and click Start Review to see all results together.



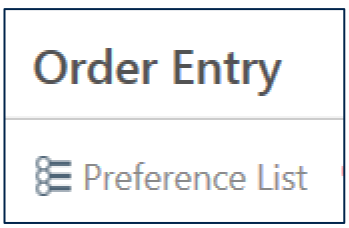
Placing Orders

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.

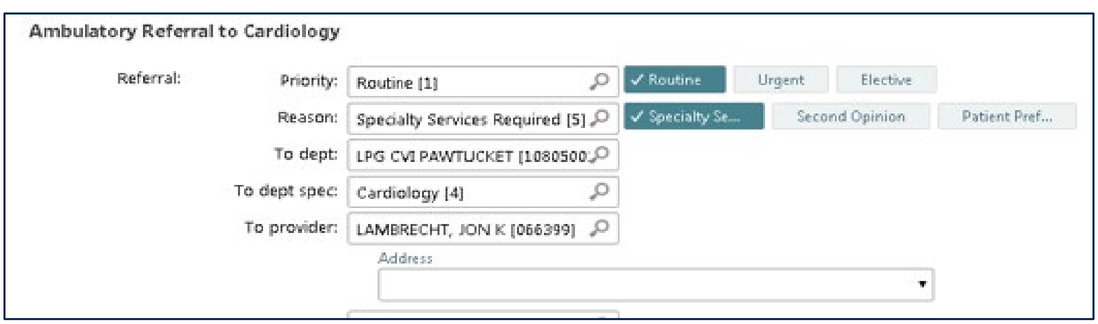


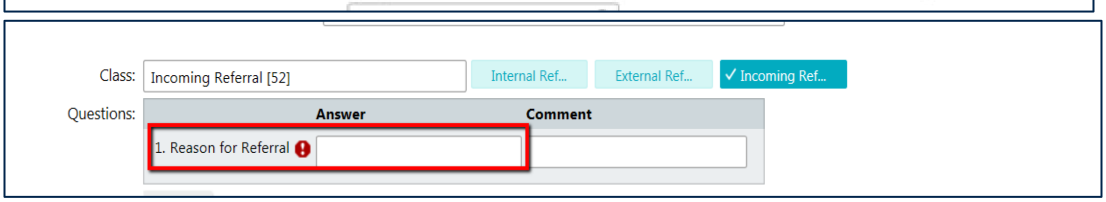
4. Click on Preference List and choose correct referral.



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

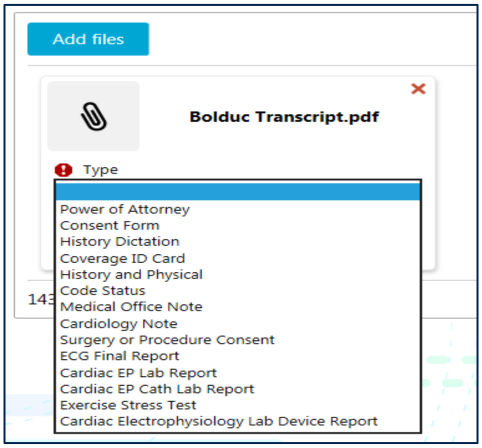
- You have the ability to choose location/address of provider for referral if provider has multiple locations in the new location field.



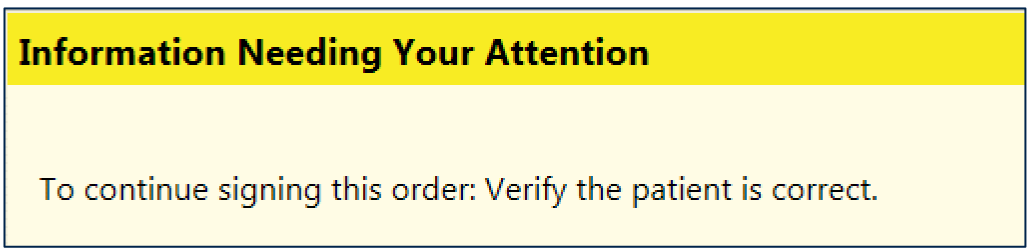


- You can upload documents to the referral by using the Attached Files feature.

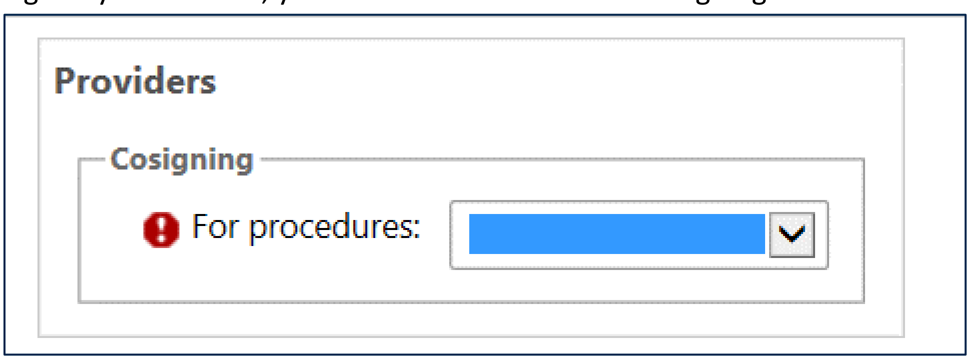
- You can label documents as the following document types:



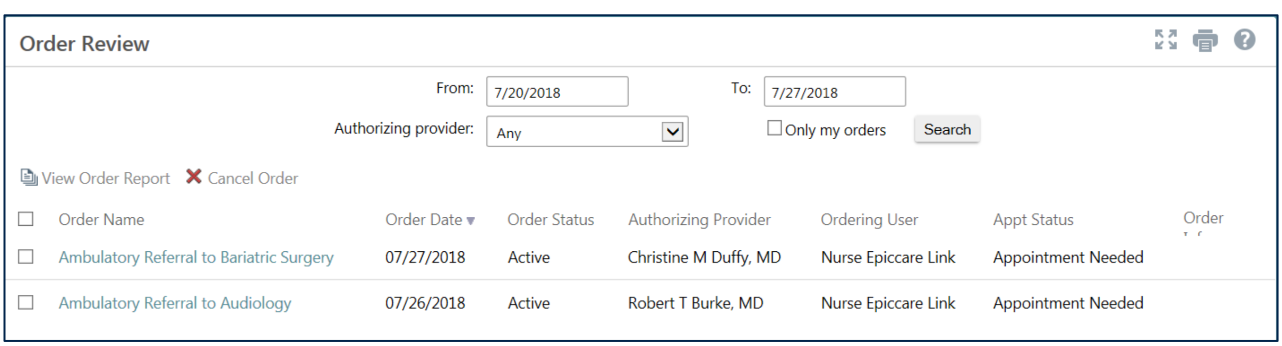
6. Accept.
7. Sign Orders.
8. Verify the patient is correct.



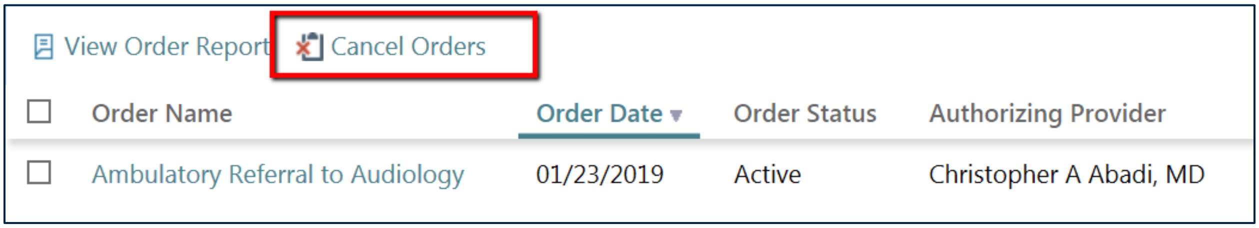
9. Sign. If you are a RN, you will need to choose the Cosigning Provider for the Procedure.



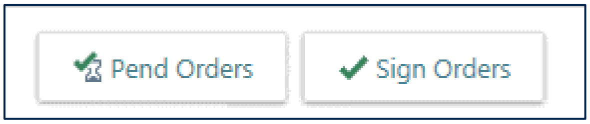
10. Order Review allows you to track all orders placed for all authorizing providers. You can change the time frame and narrow search to only your own orders. Appointment Status is listed next to order.



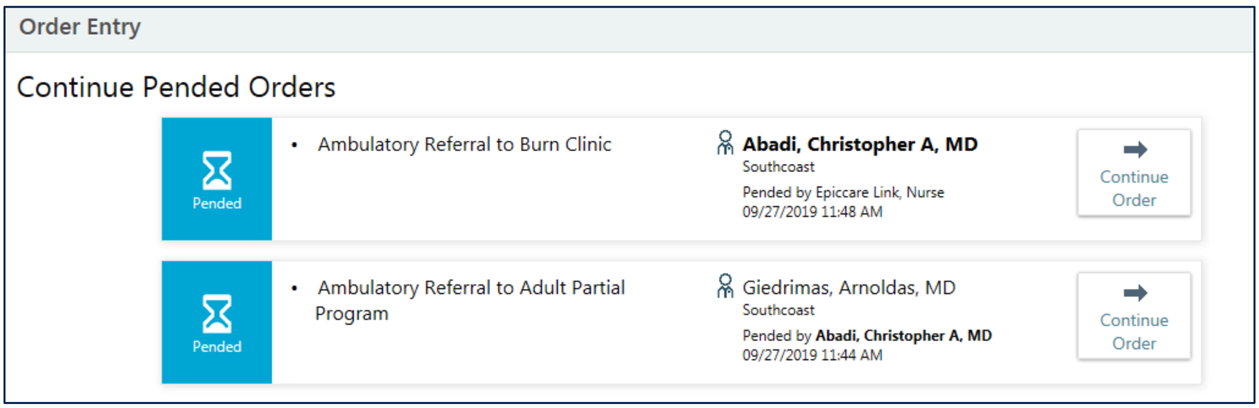
From Order Review you can cancel the Order easily.



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.



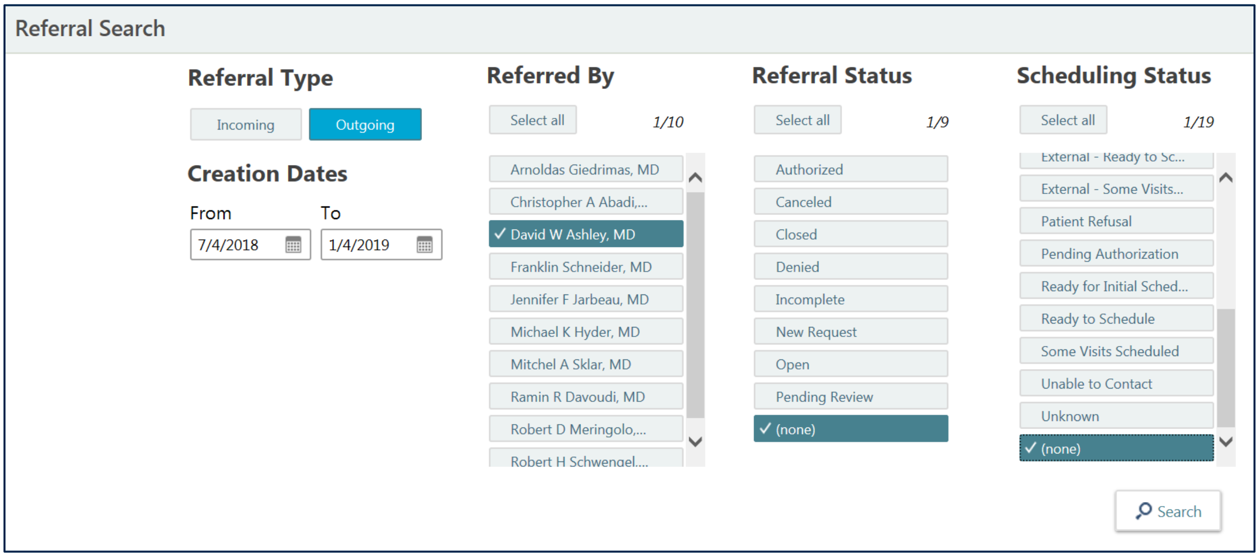
Pended orders will appear in the Order Entry activity for you to review and complete.



Referral Search

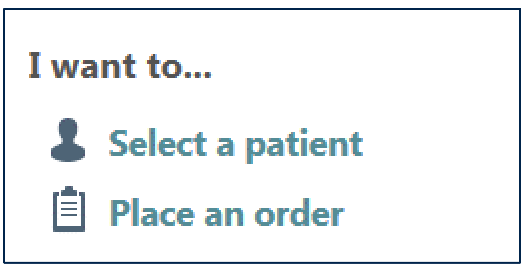
Referral Search will allow you to track status of referrals by Member or by provider.

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.

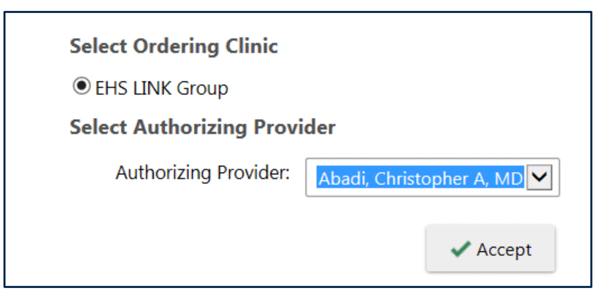


Placing Imaging Orders

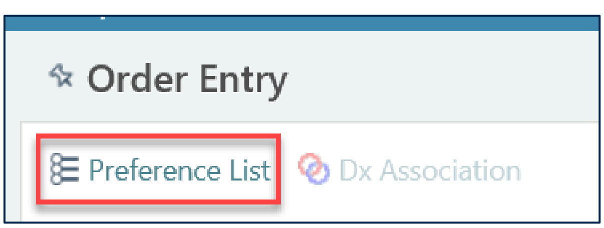
1. Select Place an Order

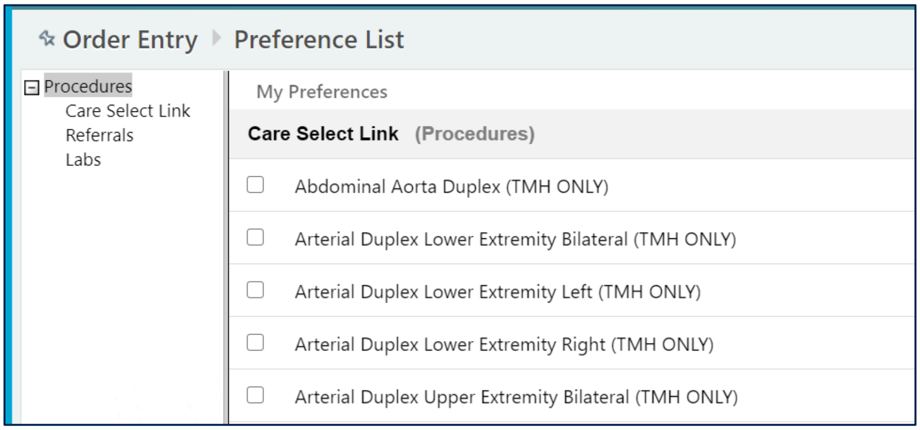


2. Search for Patient or find on My Patient List.
3. Choose Authorizing Provider from list. Accept.

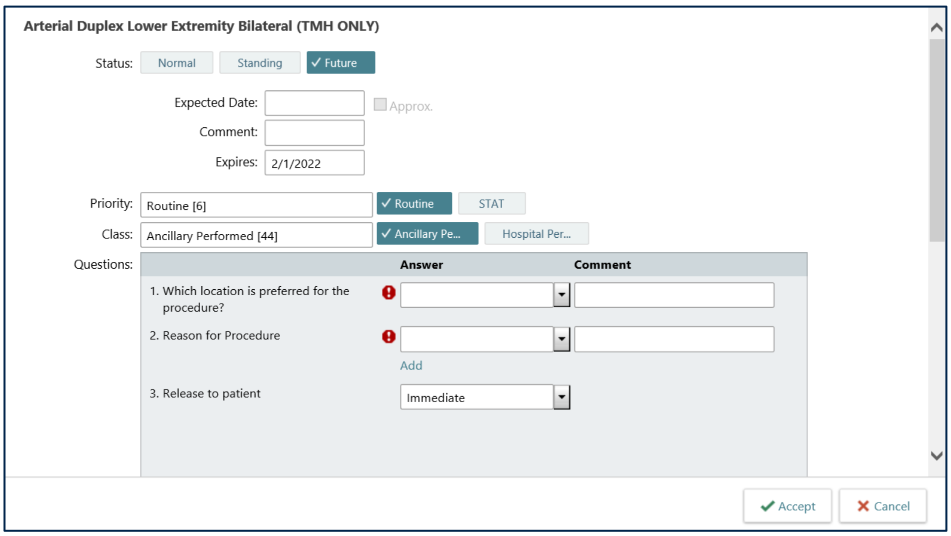


4. Click on Preference List and choose correct imaging order.

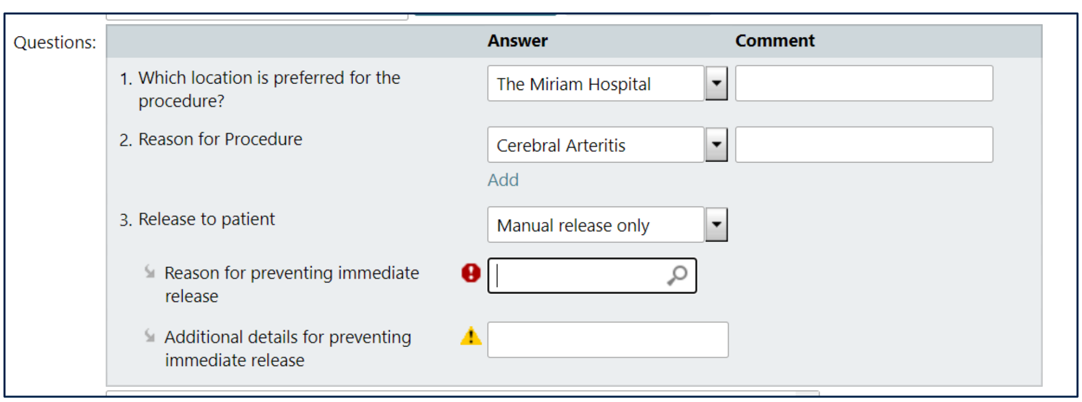




5. Address all stop signs for location and reason for procedure.



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



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

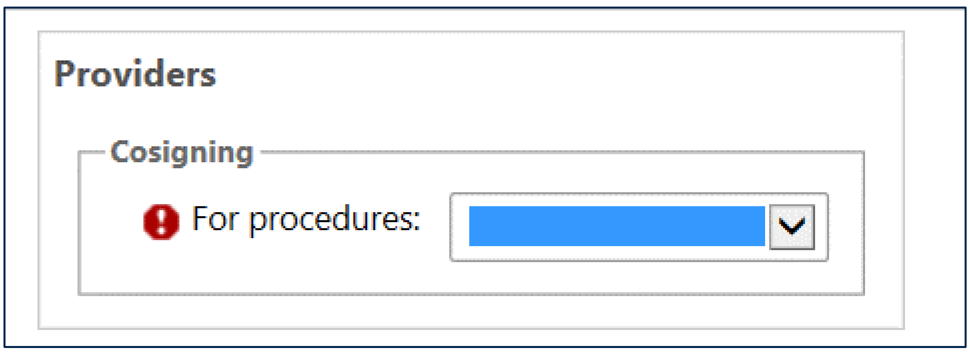
7. Accept.
8. Sign Orders.
9. Verify the patient is correct, Click. Sign Orders.

Information Needing Your Attention

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

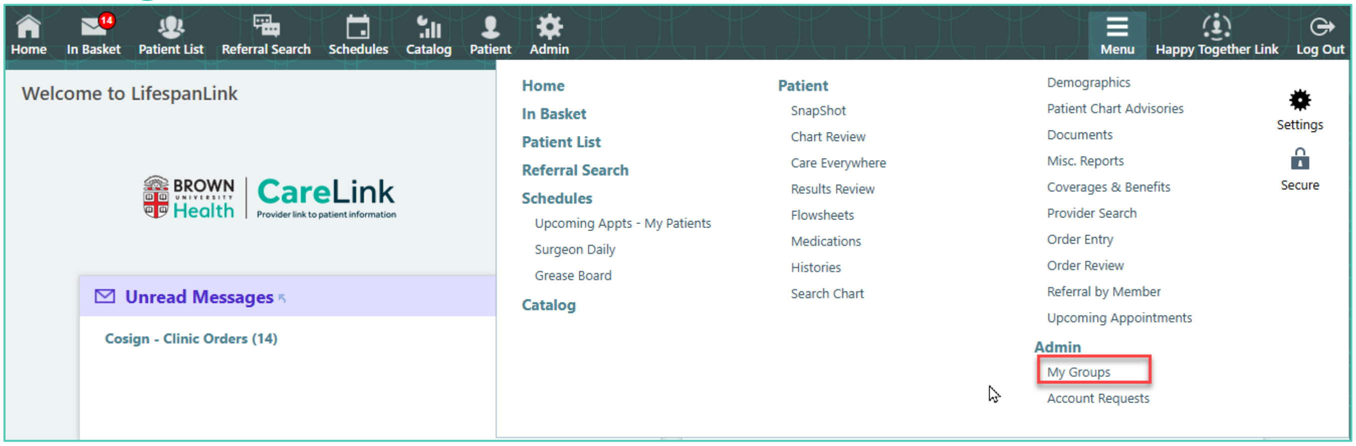
10. Sign.

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

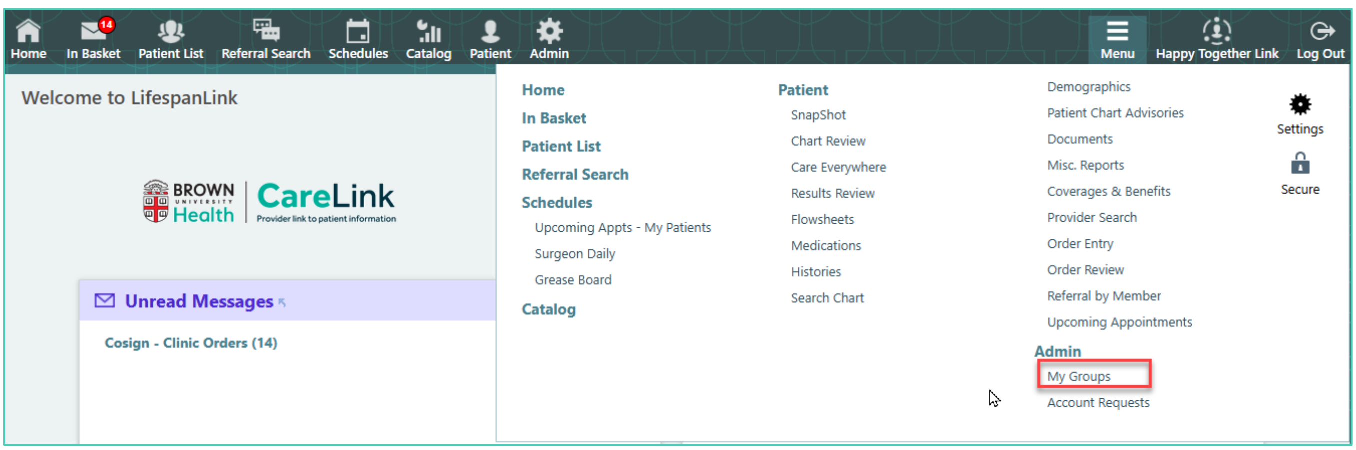


CareLink Site Administrator

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).

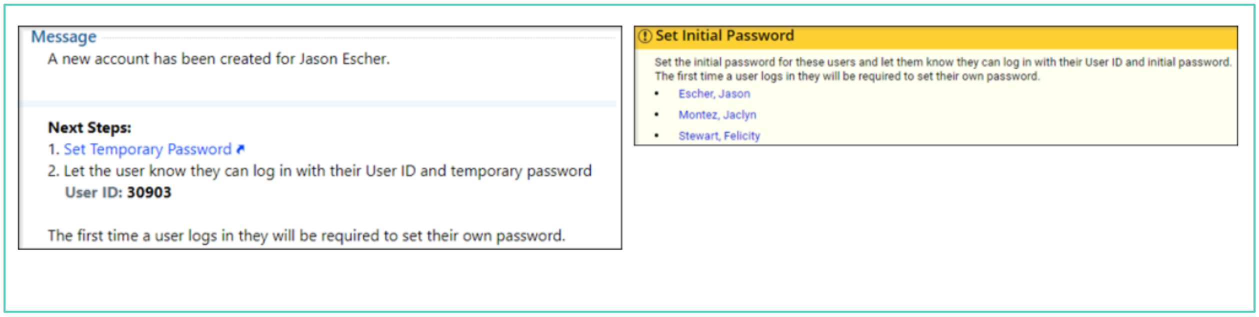


Use the buttons for each user to change their password or deactivate their account (2) and see whether a user's account is blocked (3).

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.

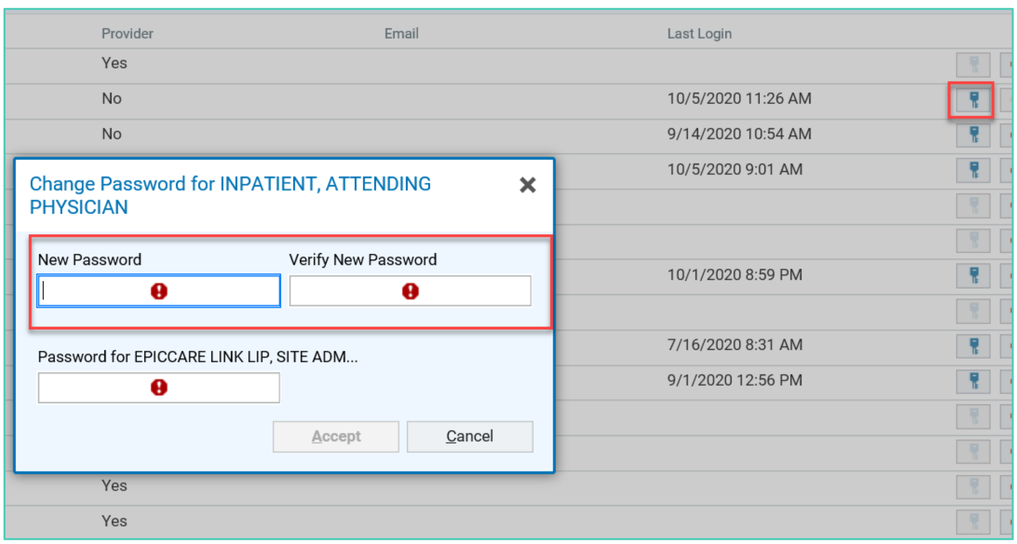
You can also open My Groups any time to view the full list of users that need an initial password set. The Set Initial Password prompt appears only if users need an initial password set. Click on a user to open the Change Password window and set an initial password.



Changing User Password

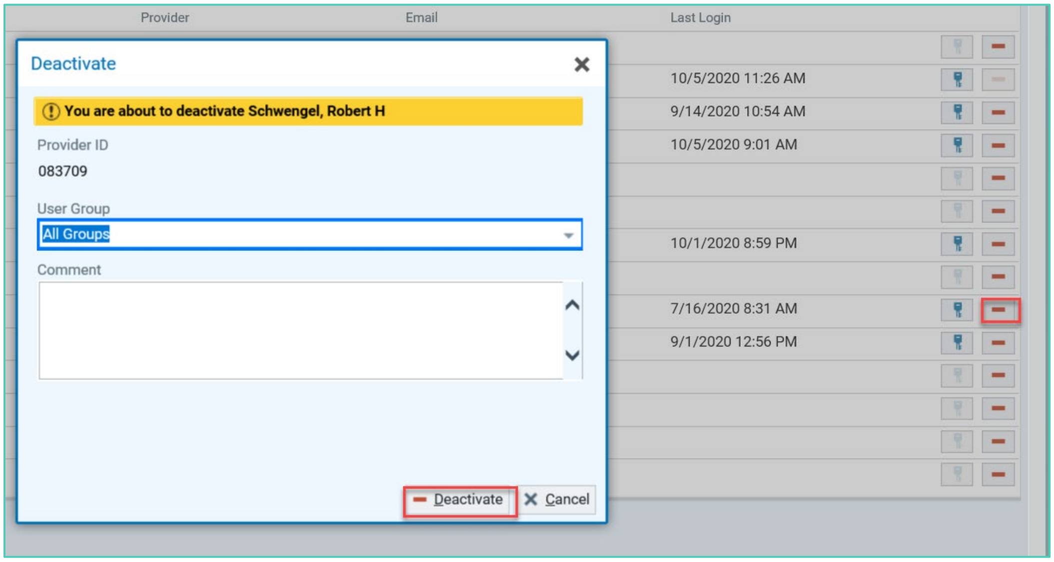
Providers now can change their own passwords.

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.



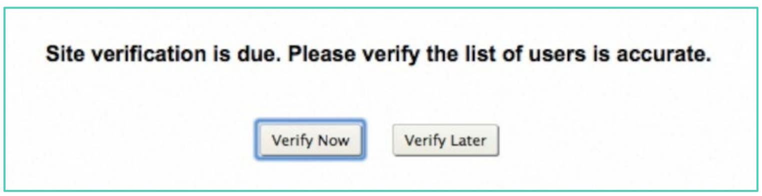
Deactivating a User

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

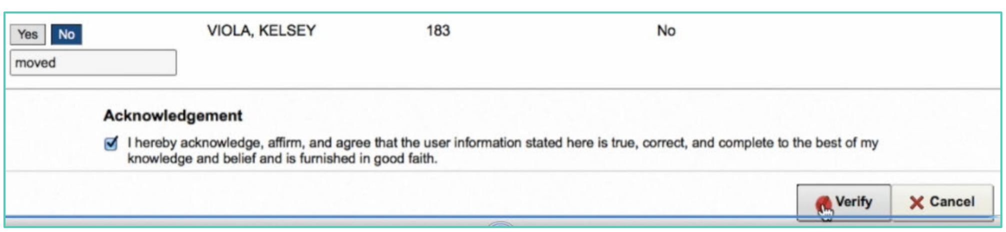


Validating Enrollment

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

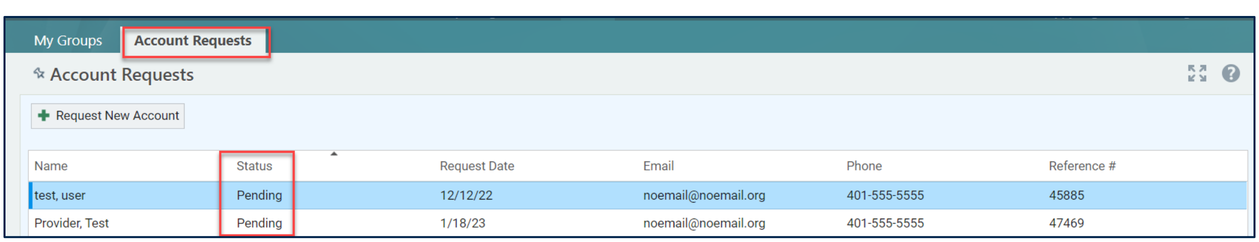


1. Review staff list and update with any information on providers that are no longer employed with your clinic.
2. Choose No if employee is no longer employed.
3. Enter comment.
4. Address Acknowledgement.
5. Click Verify.



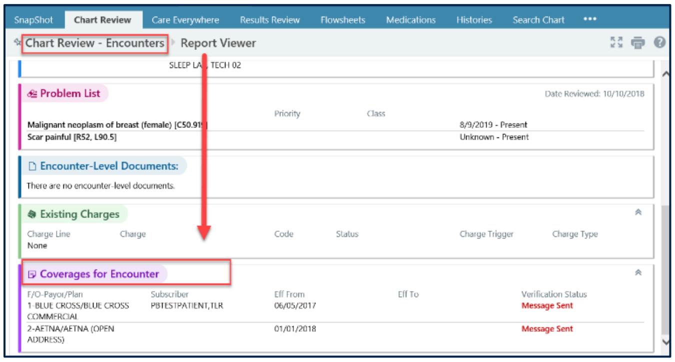
Account Requests

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.

