

CareLink- Adding New Staff to an Existing Site

Purpose:

This tip sheet provides step-by-step instructions in **LifeChart (Epic)** for existing CareLink Site Administrators to add new site administrators, providers, and non-clinical staff to an existing CareLink site, ensuring appropriate external user access is requested, documented, and approved.

Department/Specialty and Audience:

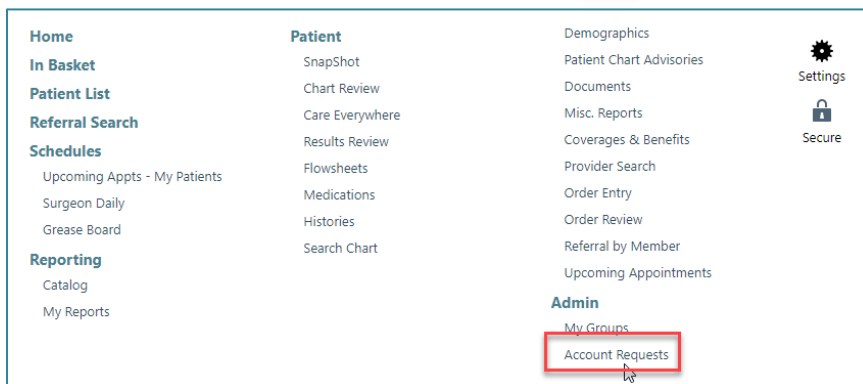
LifeChart (Epic) CareLink – External User Access; intended for existing CareLink Site Administrators responsible for managing and submitting account requests for providers, clinical staff, and non-clinical users at an established external site.

Please note that if there is no current site administrator you will need to follow the workflow outlined in the CareLink New User and Site Request – External Users Tip Sheet.

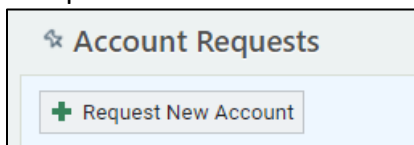


Start if Process- for all workflows







1. Site Administrator will access [Brown Health University - CareLink.](#) fill out and submits the web form.
****If this step is skipped, the request will be denied****
2. After submitting web form, the user will be redirected to the CareLink log on screen where they will log in.
3. Go to Menu and find Account Requests.



4. Click Request New Account.



5. Choose appropriate link to launch form. If adding an additional site administrator, choose appropriate request form for site admin.

6.	 Request access for a new provider  Request access for a new clinical staff member  Request access for a new non-clinician	7.	 Request access for a new provider that is also a site administrator  Request access for a new clinical staff member that is also a site administrator  Request access for a new non-clinician that is also a site administrator
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8. You will be launched into the Add User workflow.



New Site Administrator

1. User will choose appropriate Site Admin type:

- a. Complete form
- b. Click [Here to download and print Site Administrator Attestation form.](#)
- c. Users will download, **print**, fill out, sign, scan and attach the form using Add Files
Note: Electronic signatures are not accepted, your request will be denied if any documentation is uploaded with an e-signature
- d. Check the box to show they are the Site Administrator. **IMPORTANT**

2. Click Verification.

3. The Terms & Conditions are listed- User acknowledges terms, validates they are not a robot (Recapture), and the "Requested by" field.

4. Users click "Submit Request." This sends an in-Basket notification to the CareLink team to process your request.



New Provider or Non- Clinician

Each user will be added individually.

1. User will choose type of user (New Provider, New Clinical Staff Member, New Non-Clinician) and complete form.
 - a. Providers will require Name, User Group, Work email and phone, NPI#, License #, License State.
 - b. New Clinical and New Non-Clinicians require Name, User Group, Work email and phone.
2. User will complete form for each new employee needing Link access.
3. User will Submit Request. This generates in Basket message for creation of users to CSAs.

1. You will need providers - NPI and License # to complete form. Accept.

a. Provider form

The screenshot shows a web form titled "User Information" with several sections:

- User Information:** Name (Last,First): [text input]
- Basic Information:**
 - Work e-mail: [text input]
 - Work phone: [text input]
 - User Fax: [text input]
 - User Address: [text input] with a "Copy site address" button.
 - Address: [text input]
 - City (or ZIP): [text input]
 - State: [dropdown menu]
 - ZIP: [text input]
 - County: [dropdown menu]
 - Country: [dropdown menu]
- Credentials:**
 - Non-U.S. credentials
 - NPI #:** [text input] (highlighted with a red box)
 - License #:** [text input] (highlighted with a red box)
 - License state: [dropdown menu]
 - Clinician title: [text input]
 - Specialty: [dropdown menu]
- Other:** Comments: [text area]

At the bottom right, there are "Accept" and "Cancel" buttons.

b. Clinical Staff/Non-Clinician form:

The screenshot shows a web form titled "User Information" with several sections:

- User Information:** Name (Last,First): [text input]
- Basic Information:**
 - Work e-mail: [text input]
 - Work phone: [text input]
 - User Address: [text input] with a "Copy site address" button.
 - Address: [text input]
 - City (or ZIP): [text input]
 - State: [dropdown menu]
 - ZIP: [text input]
 - County: [dropdown menu]
 - Country: [dropdown menu]
- Other:** Comments: [text area]

At the bottom right, there are "Accept" and "Cancel" buttons.

2. CareLink Team will notify you via email when the account(s) are created – along with temporary login credentials