

## CareLink- Requesting New Site Creation/Adding Staff

### Purpose:

This tip sheet provides step-by-step instructions for requesting LifeChart (Epic) CareLink access to create a new external site or add site administrators and staff to an existing CareLink site using the CareLink request portal.

### Department/Specialty and Audience:

LifeChart (Epic) CareLink; intended for external providers, clinical staff, and non-clinical staff who are requesting new CareLink site creation or additional user access for their practice.

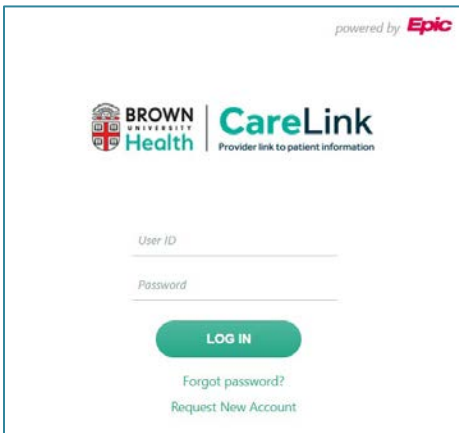
**\*\*\*It is recommended that you submit the request for site and site administrators first and after approval submit a second request for additional staff- If the initial request has errors and is denied then all information will need to be resubmitted. \*\*\***

Please note that if there is no current site administrator for your current CareLink site, please skip to the next section labeled “New Site Administrator for an Existing Practice.”

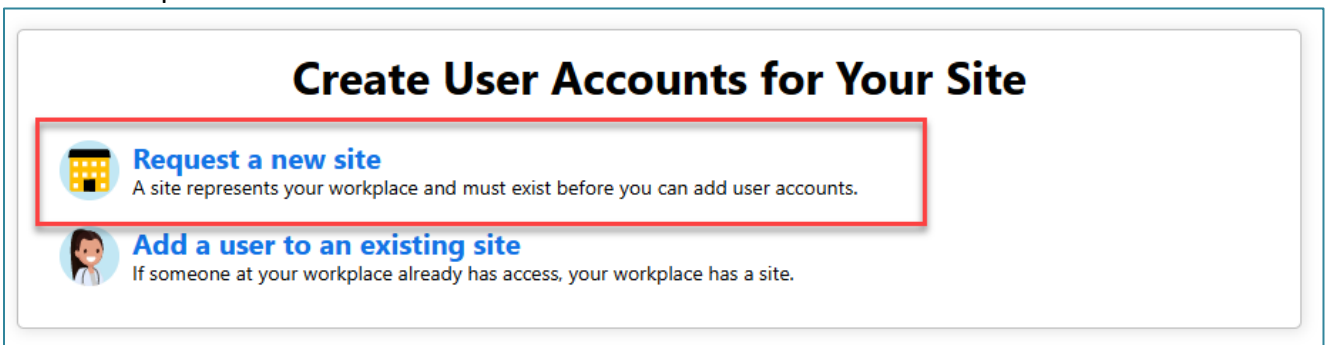


### Try it out

1. Go to [CareLink | Brown University Health](#). Fill out and submit the web form to request via the [CareLink Portal](#) link. ***\*If this step is skipped, the request will be denied\****.
2. After submitting web form, the user will be redirected to the CareLink homepage.
3. Click Request New Account.



4. Choose “Request a new site.”



5. Complete all requested information. (you will need the site NPI for this request).

6. Click Next. You will need to add at least one site administrator. A site administrator can be a provider, clinical or non-clinical staff member. Choose the appropriate link.

7. Complete form in its entirety.

- a. Click *Here* to download and print Site Administrator Attestation form.
- b. 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**

8. Check the box to show they are the Site Administrator. IMPORTANT

**Site Administrator**

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.

Make this user a site administrator

9. Accept.

You will be launched into the Add User workflow. **\*\*\*It is recommended that you submit the request for site and site administrators first and after approval submit a second request for additional staff- If the initial request has errors and is denied then all information will need to be resubmitted.\*\*\***

The screenshot shows a breadcrumb trail: 'New Account Request > Site > Users'. Below this is a progress bar with three steps: '1. Site Information', '2. Users' (highlighted in blue), and '3. Verification'. On the left, under the heading 'Users', there are three icons: a green plus sign in a red box labeled 'Add', a pencil icon labeled 'Edit', and a red minus sign labeled 'Delete'.

10. Each user will be added individually. You will need providers - NPI and License # to complete form. Accept.

**a. Provider form**

**User Information**

Name [Last,First]:

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**Basic Information**

Work e-mail:  Work phone:

User Fax:

User Address:

Address:

City (or ZIP):

State:  ZIP:

County:

Country:

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**Credentials**

Non-U.S. credentials

NPI #:  License #:

License state:  Clinician title:

Specialty:

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**Other**

Comments:

**b. Clinical Staff/Non-Clinician form:**

**User Information**  
Name [Last,First]:

**Basic Information**  
Work e-mail:  Work phone:

User Address:

Address:

City (or ZIP):

State:  ZIP:

County:

Country:

**Other**  
Comments:

11. Click Accept. Submit Request.

12. Once your request is processed and completed, CareLink team will notify you via email when the site/account(s) are created – along with temporary login credentials.