MaineHealth EpicCare Link
User Quick Start Guide

Getting Started

EpicCare Link is a tool that provides real-time web access to patient information so you can access patients' clinical data and communicate with MaineHealth to provide quality patient care. You can also use EpicCare Link to quickly refer patients to our organization.

EpicCare Link is a collection of different web pages, or activities, that correspond to different tasks. The activity that you use depends on what you want to accomplish.

This guide takes you on an introductory tour of EpicCare Link. The first pages include information to help you get started, such as browser requirements and how to log in. The rest of the guide contains explanations of how to use EpicCare Link.

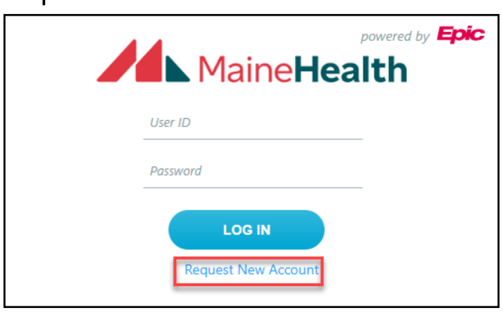
!	Each organization configures Epic differently, so what you see in this guide might differ from what you see in your system.

Help and Contact Information

For help using an activity, click . For any technical or account issues, call the Service Desk at **207-661-3785.** Please note that you are an EpicCare Link user, and be prepared to provide your First Name, Last Name and email address.

Request a New User Account for an Existing EpicCare Link Site

- Click the link or manually enter this URL into your browser https://carelink.mainehealth.org/ to request New Account



- Select **Add a user** to an existing site
- Select the type of user that best matches your request
- Fields marked with the Red Stop Sign are required fields and all other fields are optional. When in doubt, leave any comments or concerns in the **Comments** field, and submit your request. A MaineHealth administrator may reach out to clarify any details if needed.
- Once all details have been completed, proceed to **Verification** and Submit Request.
- Please allow for up to five (5) business days for processing. If there are any concerns, please contact our Service Desk at 207-661-3785.

Request a New Site

- Click the link or manually enter the URL into your browser https://www.mainehealth.org/health-care-professionals/epiccare-link-mainehealth to download the **User Agreement** (see the **View User Agreement** button). Please have someone in a leadership position read and complete the User Agreement carefully.
- Note: Only one User Agreement is needed for each site, subsequent user requests will not need to fill this out again.
- Click the link or manually enter this URL into your browser https://carelink.mainehealth.org/ to request New Account

- Complete the **Site Information** page and attach the **User Agreement** in the attachments field.
- Add at least one user to your site. You may request additional users at the same time or submit separate user requests later.
- Designate one user as the **Site Administrator**. This individual will be the primary contact if MaineHealth needs additional information regarding the request.
- After all users have been added, proceed to **Verification** and submit the request.
- Allow up to five (5) business days for processing. If you have any questions or concerns, contact the Service Desk at 207-661-3785.

Browser, System, and Connection Requirements

You must use one of the following Internet browsers to access EpicCare Link:

Windows operating system:

- Microsoft Edge version 88 or later
- Chrome version 88 or later
- Mozilla Firefox version 78 or later
- Internet Explorer version 11 (May 2022 and earlier only)

Macintosh operating system:

- Firefox version 78 or later
- Chrome version 88 or later
- Safari version 14 or later

Linux operating system:

- Chrome version 88 or later

EpicCare Link and Tapestry Link can also be accessed by iPads running iOS 14 or later using the Safari browser and Android tablets using the Chrome browser. The native Android browser and other third-party browsers are not supported. The Chrome browser on iOS is also not supported.

To function properly with your web application, a browser must be able to accept cookies, and it must be enabled to run JavaScript. These are enabled by default when you install the supported browsers, so they're supported unless you have explicitly disabled them.

EpicCare Link requires a minimum screen resolution of 1024x768 pixels. We recommend that you use a high-speed Internet connection to achieve the best system speed and performance.

Requirements for Accessing EpicCare Link

The 2 requirements before accessing EpicCare Link

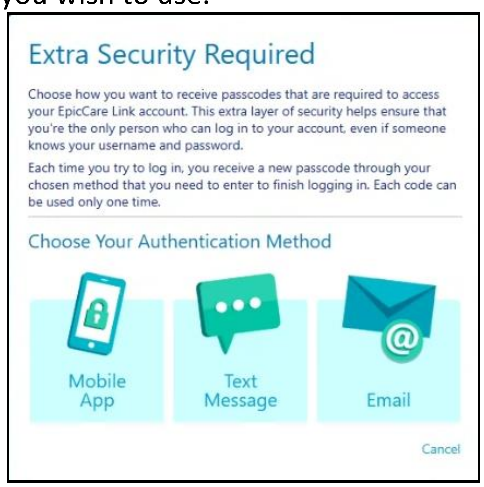
- Epic Account
- Epic Two Factor Authentication (2FA)

If you have any questions about this, contact the MaineHealth IT Service Desk at **207-662-6400**

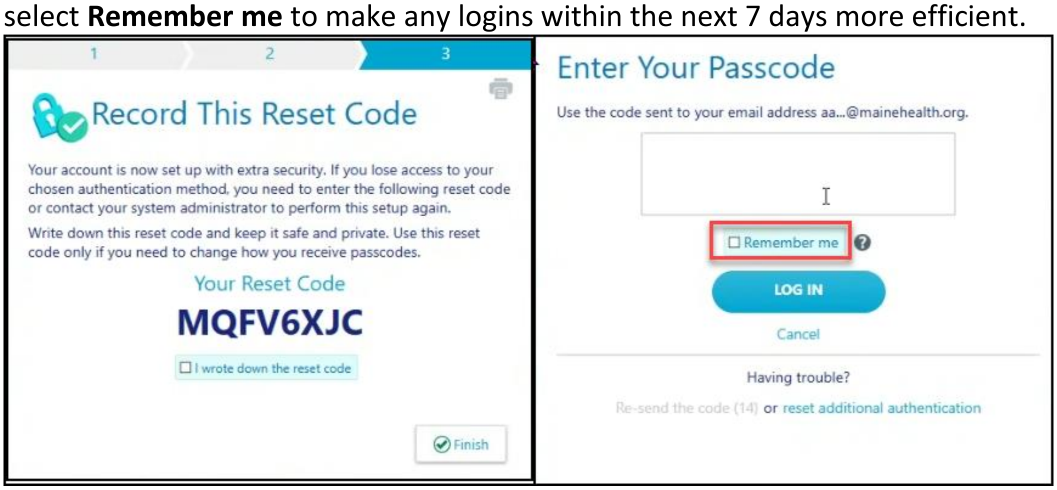
Accessing EpicCare Link

1. From your web browser, browse to this URL or click on the hyperlink: https://carelink.mainehealth.org/
2. At the login prompt use your MaineHealth login credentials.

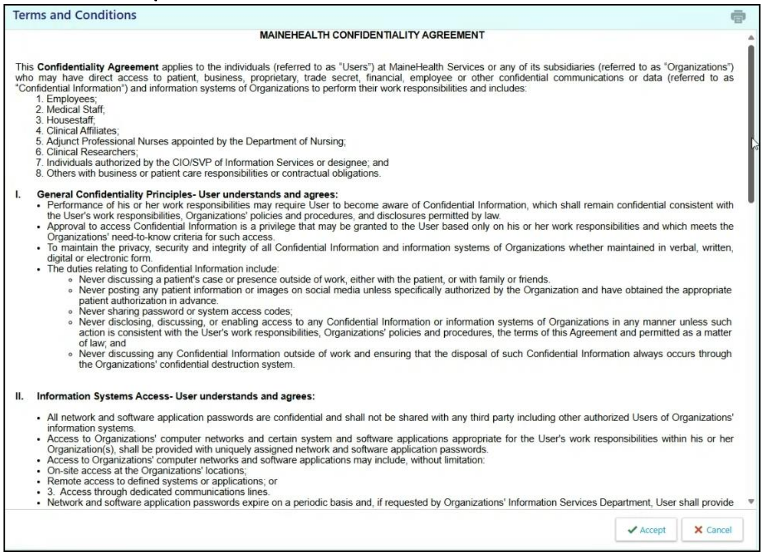
1. The first time you log in you will be prompted to choose the two-factor authentication (2FA) method you wish to use.



2. Using the code sent to your selected method, enter **Your Passcode**, in the passcode field. Be sure to select **Remember me** to make any logins within the next 7 days more efficient.



3. You will be presented with the Terms and Conditions screen. Click **Accept** once you have read.


Terms and Conditions

MAINEHEALTH CONFIDENTIALITY AGREEMENT

This **Confidentiality Agreement** applies to the individuals (referred to as "Users") at MaineHealth Services or any of its subsidiaries (referred to as "Organizations") who may have direct access to patient, business, proprietary, trade secret, financial, employee or other confidential communications or data (referred to as "Confidential Information") and information systems of Organizations to perform their work responsibilities and includes:

1. Employees;
2. Medical Staff;
3. Housestaff;
4. Clinical Affiliates;
5. Adjunct Professional Nurses appointed by the Department of Nursing;
6. Clinical Researchers;
7. Individuals authorized by the CIO/SVP of Information Services or designee; and
8. Others with business or patient care responsibilities or contractual obligations.

I. **General Confidentiality Principles- User understands and agrees:**

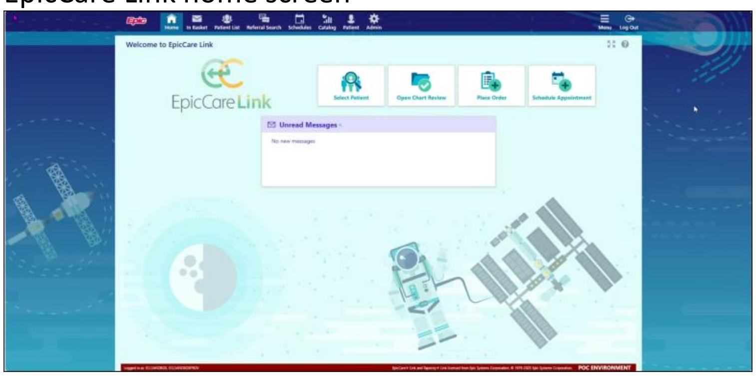
- Performance of his or her work responsibilities may require User to become aware of Confidential Information, which shall remain confidential consistent with the User's work responsibilities, Organizations' policies and procedures, and disclosures permitted by law.
- Approval to access Confidential Information is a privilege that may be granted to the User based only on his or her work responsibilities and which meets the Organizations' need-to-know criteria for such access.
- To maintain the privacy, security and integrity of all Confidential Information and information systems of Organizations whether maintained in verbal, written, digital or electronic form.
- The duties relating to Confidential Information include:
  - Never discussing a patient's case or presence outside of work, either with the patient, or with family or friends.
  - Never posting any patient information or images on social media unless specifically authorized by the Organization and have obtained the appropriate patient authorization in advance.
  - Never sharing password or system access codes;
  - Never disclosing, discussing, or enabling access to any Confidential Information or information systems of Organizations in any manner unless such action is consistent with the User's work responsibilities, Organizations' policies and procedures, the terms of this Agreement and permitted as a matter of law; and
  - Never discussing any Confidential Information outside of work and ensuring that the disposal of such Confidential Information always occurs through the Organizations' confidential destruction system.

II. **Information Systems Access- User understands and agrees:**

- All network and software application passwords are confidential and shall not be shared with any third party including other authorized Users of Organizations' information systems.
- Access to Organizations' computer networks and certain system and software applications appropriate for the User's work responsibilities within his or her Organization(s), shall be provided with uniquely assigned network and software application passwords.
- Access to Organizations' computer networks and software applications may include, without limitation:
- On-site access at the Organizations' locations;
- Remote access to defined systems or applications; or
- 3. Access through dedicated communications lines.
- Network and software application passwords expire on a periodic basis and, if requested by Organizations' Information Services Department, User shall provide

✔ Accept ✖ Cancel

4. EpicCare Link home screen



Navigating in EpicCare Link

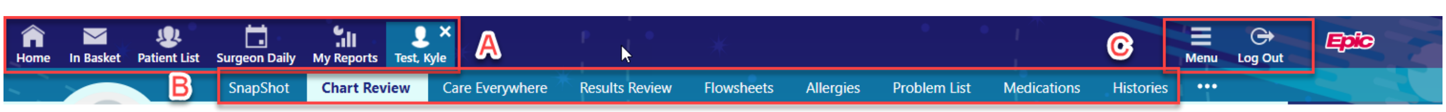
When you log in to EpicCare Link, several sets of navigation tools appear at the top of the page.

A) **Navigation Tabs:** Use these tabs to open different activities in EpicCare Link.

B) **Activity Menu**: Use this menu to open the various activities that are contained in the selected navigation tab. For example, the **Patient** tab activity menu contains the **Allergies** and **Chart Review** activities.

- If there are more activities than can fit on the screen, hover over the ellipsis on the far right of the menu to see all the activities contained in the tab.
- You can also click to pin an activity so it appears first in the menu. If you pin multiple activities, they appear in the order that you pinned them. Click and drag pinned activities in the menu to change their order.

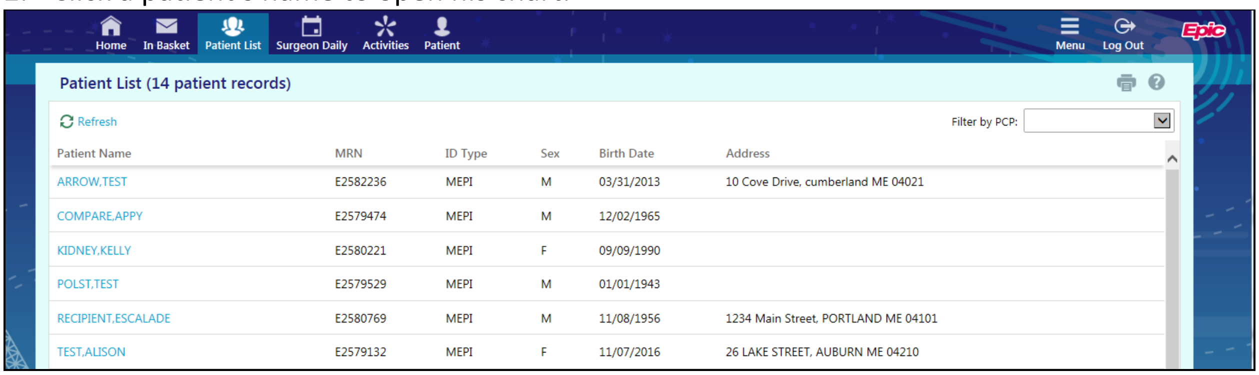
C) **Action Options:** Use these buttons, located on the top right of the screen, to perform basic tasks, such as selecting a patient or logging out.



Accessing the Patient Chart

Select your Patient's Chart from a list of Current Patients

1. Click **Patient or Patient list**.
   - If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name.
2. Click a patient's name to open his chart.

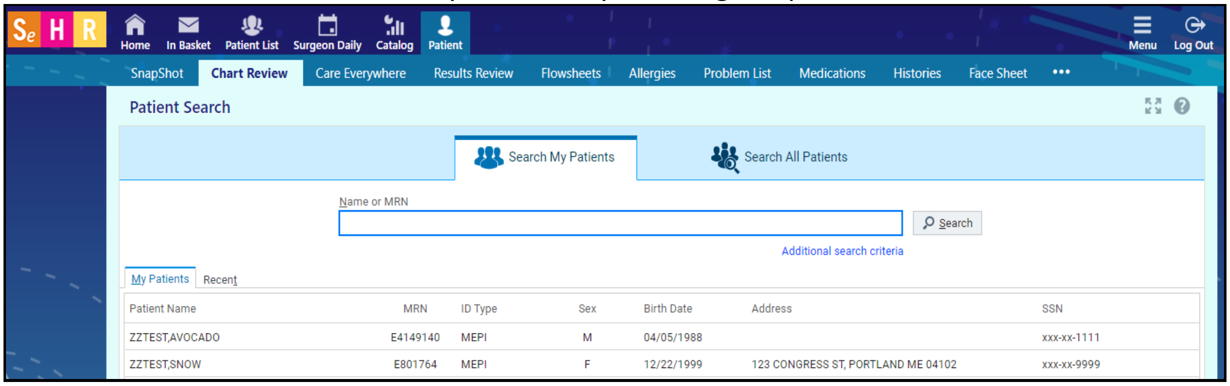


3. To view a list of your patients, you must have a provider relationship of PCP, Attending, Admitting, or Treatment Team on the admission.
4. Select a patient's name to view additional patient-specific information in the report pane.
5. If you view a report frequently, click to add a button for the report to the toolbar. From that page, you can also remove your report toolbar buttons, rearrange the order of buttons, and rename the reports.
6. Click to open a patient's chart.

> To see only the patients for whom you are the PCP, select your name in the **Filter by provider** field.

Search for a Patient's Record Based on Name or MRN

1. Click **Patient** and Search my Patients by entering the patient's name or MaineHealth MRN.



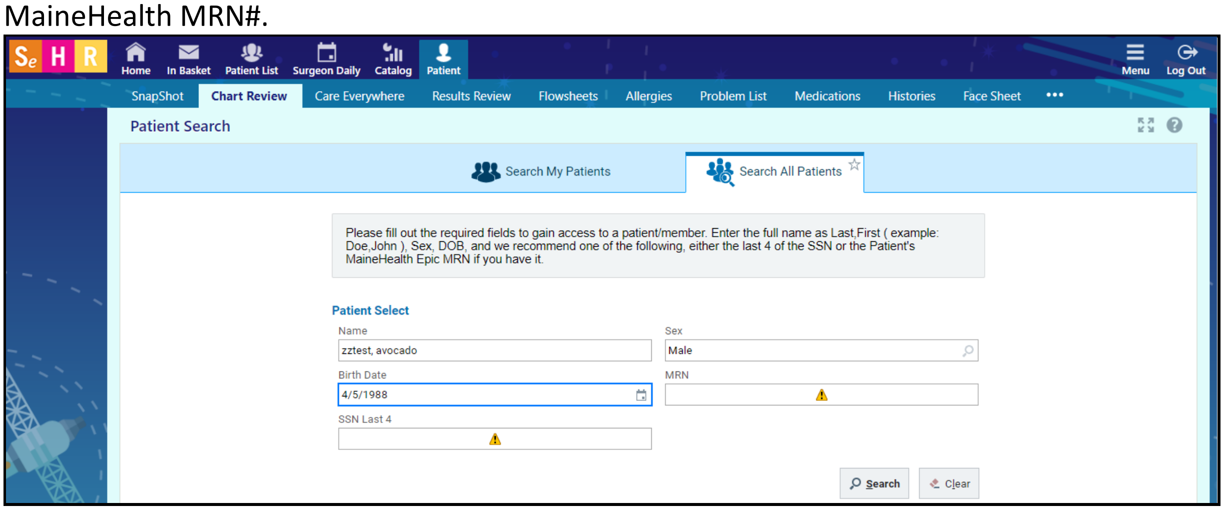
2. In the Search Results window, click the name of the patient whose chart you want to open.

In two clicks, you can quickly open a patient chart that you recently had open. In the **Search My Patients** section of the Patient Search activity, select the **Recent** tab and then click the name of the patient.

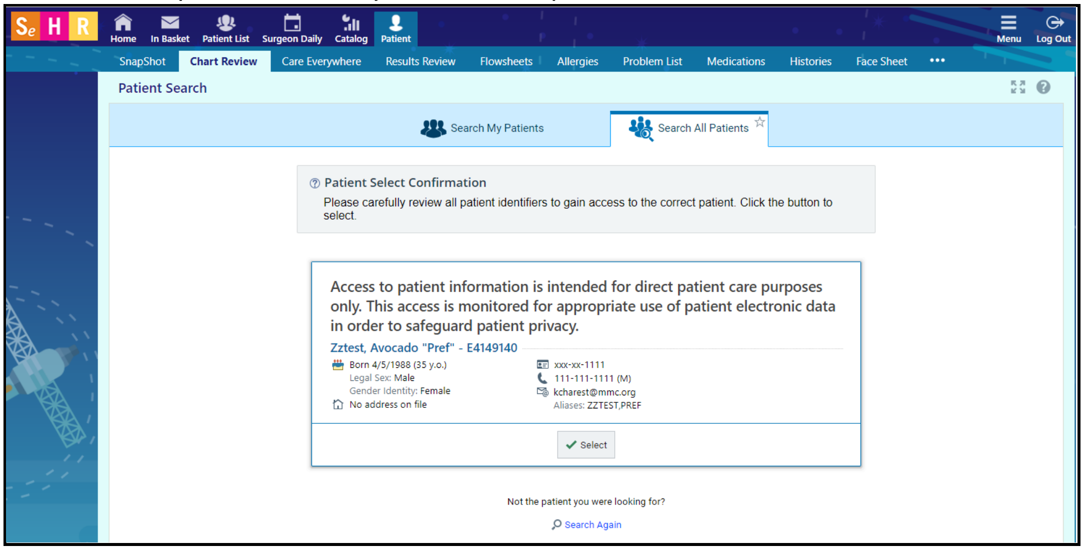
What if I can't Find a Patient?

If you don't find a patient using the methods above, you might not have been granted access to her chart yet, or she might not have a record in the system. Use the Search All Patients section of the Patient Search activity when you need to gain immediate access to a patient's chart for the first time, such as in case of an emergency. Note that you must enter the patient's first and last name when using this method.

1. If your initial search returns no results, click **Search All Patients** from the Search Results window.
2. Fill out the required fields to gain access to the patient record. Enter the full name as Last name, first name, Sex, and DOB then click **Search**. If you cannot find your patient add the last 4 of the SSN# or the MaineHealth MRN#.



3. To select the patient record you want to open click ✔ **Select**.



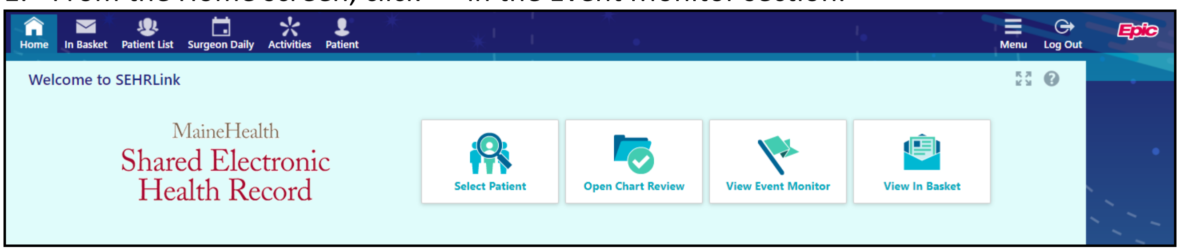
Monitoring Your Patients

Event Monitor allows you to monitor events that occur in your patients' care, such as inpatient admissions or discharges, outpatient visits, or new lab results. You can view these events on the home screen or in your In Basket.

Target your Event Notifications

To focus on the medical events that matter most to you, use event and relationship filters in Event Monitor. You can tailor which types of events you're notified of and for which patients. For example, you can choose to be notified of only the events associated with you or certain providers in your group. You're associated with an event if you're the attending provider, admitting provider, referring provider, a treatment team member, a care team member, or the patient's PCP.

1. From the Home screen, click in the Event Monitor section.



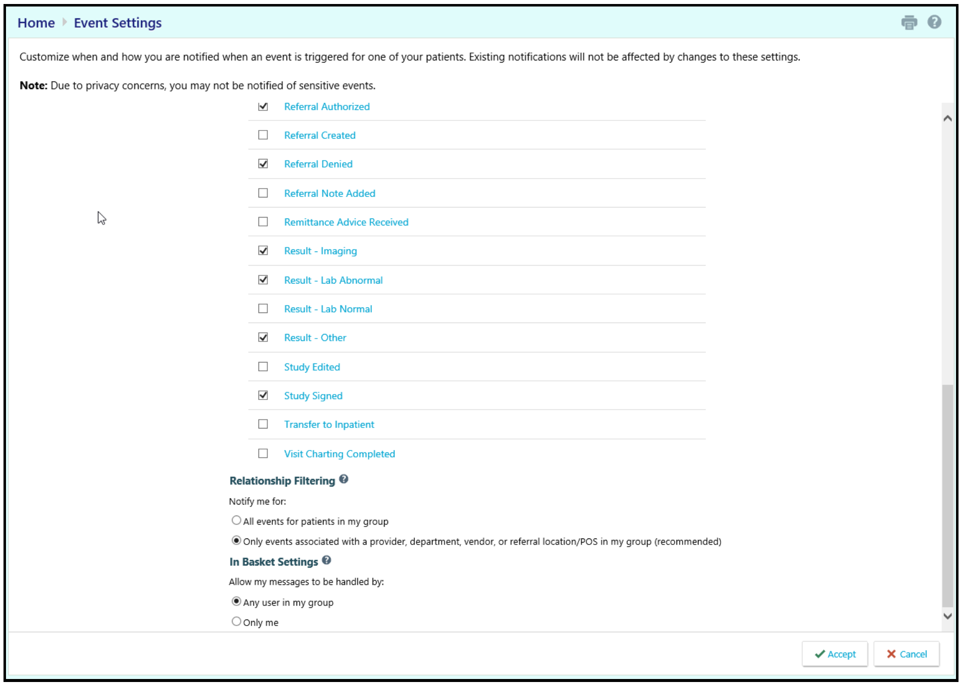
2. Choose which types of events you'll receive notifications for in the Event Filter section. To receive notifications for all the available event types, select the **Events I Will Receive** check box:

3. Choose which events you'll receive notifications for by selecting one of the options in the Relationship Filtering section:

   a. **All events for patients in my group**. This option includes events for any patient that you have access to. For example, if you choose to receive referral notifications, you are notified of any authorized referrals, even if the referral isn't to you or your group.
   b. **Only events associated with a provider, department, or vendor in my group (recommended).** For example, if a patient you have access to is admitted to the hospital, and the patient's PCP is in your group, you receive a notification even if the PCP isn't associated with the admission.
   c. **Only events associated with me**.
   d. **Only events associated with certain providers or departments**. This option includes only events associated with the providers or departments you select.

4. Choose who your notifications are sent to in the In Basket Settings section:

   a. **Any user in my group**. Your notifications are sent to a group of users at your organization, and any of the users can access the message and mark it as Done, which removes it from the In Baskets of all the users in the group. This option helps reduce the risk of duplicate follow-up and can save time.
   b. **Only me**. You are the only user who can mark the notifications as Done. Other users might still see and act on the same notifications, but they can't mark the message as Done. This option helps ensure that you see every notification.



View Patient's Recent Events

Select the **Home** tab and hover over each type of event in the Event Monitor section to review recent events for your patients.

If necessary, you can view more information about events and mark them as Done in In Basket by clicking the name of the patient in the Patient column.

Open a Patient's Chart from an Event Message

Select the In Basket message for the patient's event and click **Select Patient** to open the patient's chart.

Reviewing the Patient Chart

Review the Patient's chart before a visit

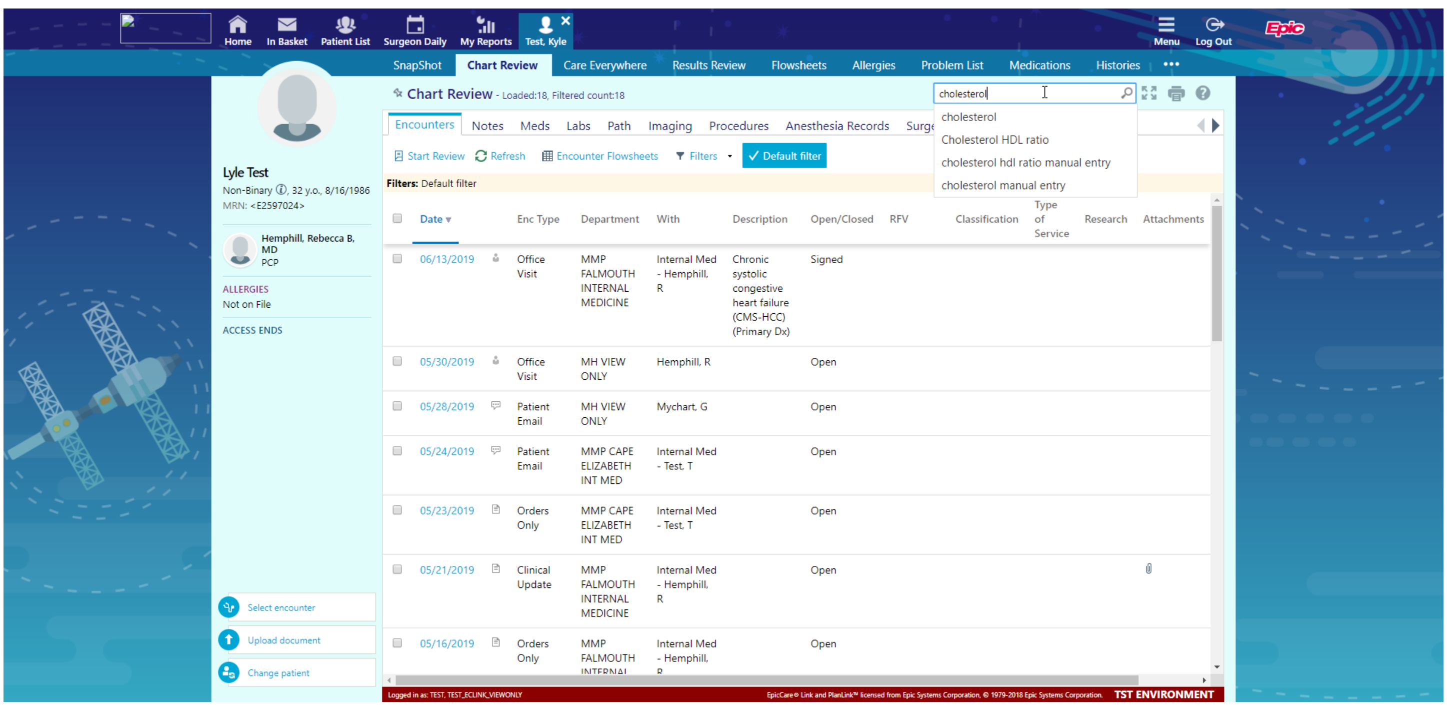
1. Open the patient's chart, click **Chart Review**, and select a tab that includes information you want to review.
2. To view more detail, such as a specific patient visit, click the date link that appears in the row.

> To view details on several rows at once, select the check boxes in those rows, and then click **Start Review**.

3. To send a message to the patient's PCP regarding an office visit, click **Ask a Question**, fill out the message form, and click ✔ **Send Message**.

Find information quickly in the Patient's Chart

For patients with large charts, you can enter text in the **Search Chart** field to quickly find the information you need. For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as lipid panel results and progress notes that mention cholesterol.



Use filters to narrow the list of information

You can also use filters to find visits, labs, medications, or other information in Chart Review. For example, on the **Encounters** tab, you can filter the list so you see only the visits associated with certain providers.

1. In Chart Review, select a tab.
2. Click **Filters** and select a filter type. Then, select check boxes next to the values that you want to see. For example, select Encounter Type, and then select the Billing Encounter filter.
3. Click ✔ **Apply** to make the results of your search appear.

To remove the search criteria and begin a new search, click **Clear All**.

View trending data in graph or table format in Chart Review

1. In Chart Review, select the check box for the data you want to view. For example, select specific visits or lab tests.
2. Select the type of flowsheet that you want to create.
   - Click **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.
   - Click **Lab Flowsheets** to graph lab result data.
3. Click and drag to select the table cells that contain data that you want to graph.
4. Click **Line Graph** or **Bar Graph** to create a graph of the selected data.

View a patient's trending lab results in Results Review

1. Select the **Patient** tab and click **Results Review**.
2. Select the date range for the results data you want to see and click **Accept**.
3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left. Select the name of the component or component type that you want to view.
4. To view more columns of results, click **Load More**. To view all columns of a patient's results for the time range that you selected, click **Load All**.

Click **Time Mark** so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen.

Customize the way results appear

1. In Results Review, click **Options**.
2. To make the most recent results appear from left to right by default, select the **Trend Dates in reverse chronological order** check box.
3. Set your other default preferences, such as the default number of columns to show, using the other options.
4. Click **Accept**.

Imaging Results

Narrative results for imaging studies are available in EpicCare Link, however the actual images are not viewable in EpicCare Link.

View a patient's allergies

Select the **Patient** tab and click **Allergies**.

For more information about an allergy, select the allergy and click **View History**.

View a list of the patients' current medical problems

Select the **Patient** tab and click **Problem List**.

For more information about a problem, click the **View Report** link.

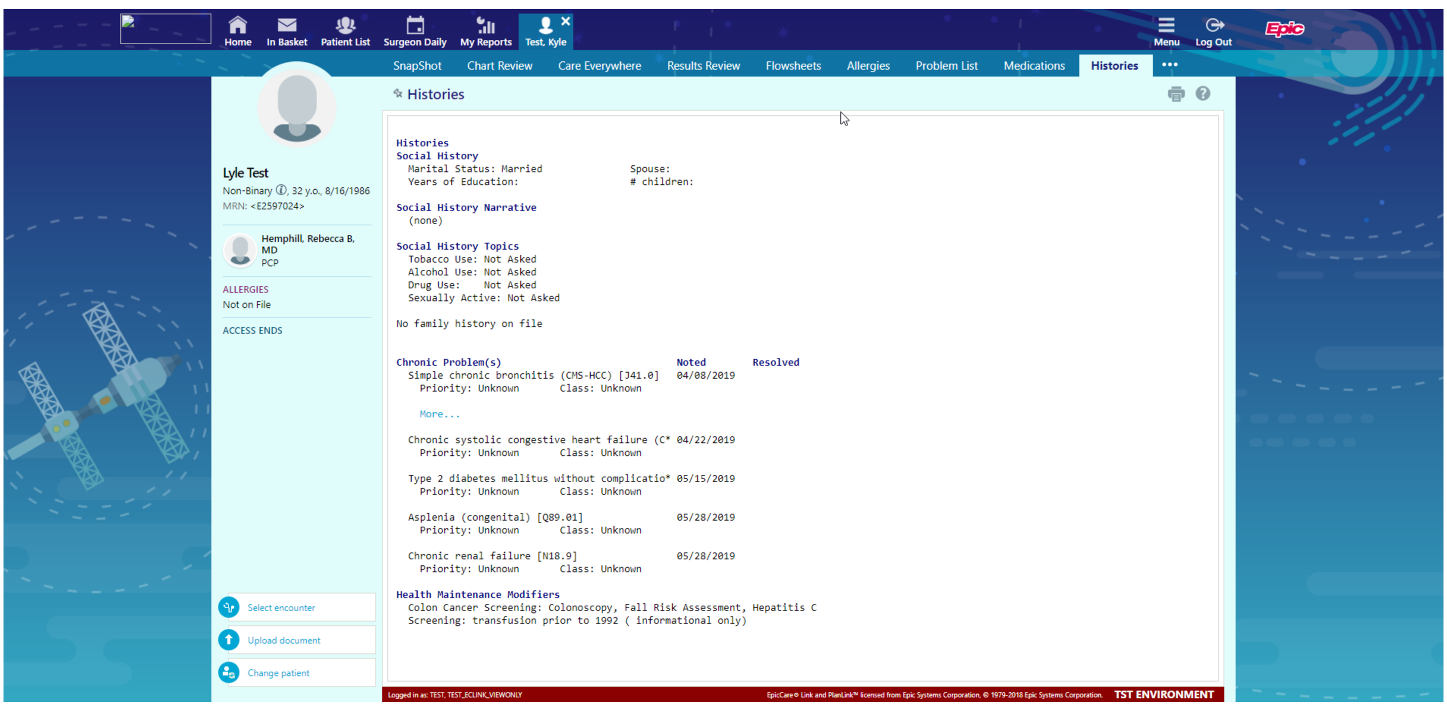
View a patient's current medications

Select the **Patient** tab and click **Medications**.

For more information about a medication, click **View Details**.

View patient's history

Select the **Patient** tab and click **Histories** to see a report with information about the patient's medical, surgical, family, and social history. Social history includes topics like tobacco use and sexual activity:

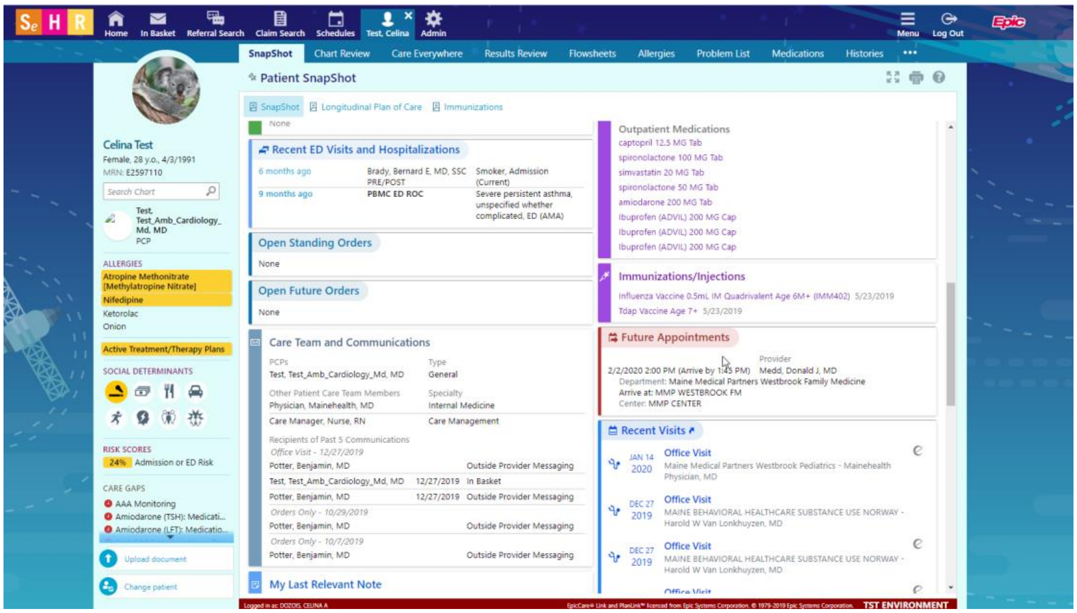


For a high-level summary of the current patient's chart, select **SnapShot** from the Clinical Review menu.

Patient SnapShot

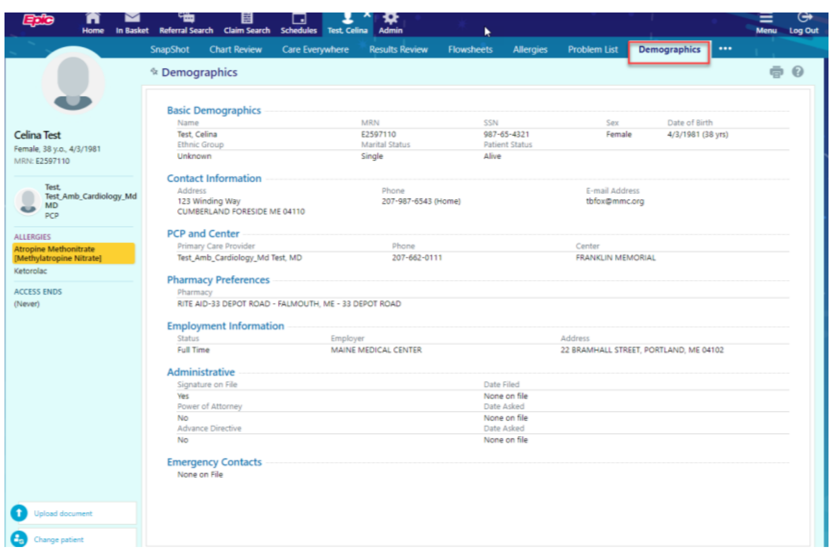
The Patient SnapShot provides a glimpse into the patient’s overall picture, aggregating important information from the the patient’s chart and depositing it in one place for ease of viewing.

Items such as **Open Standing Orders** and **Open Future Orders**, as well as **Future Appointments** and **Recent Visits:**



View a patient's demographics

Select the **Patient** tab and click **Demographics** to see a report with demographic information like the patient's address, PCP, emergency contacts, and more.

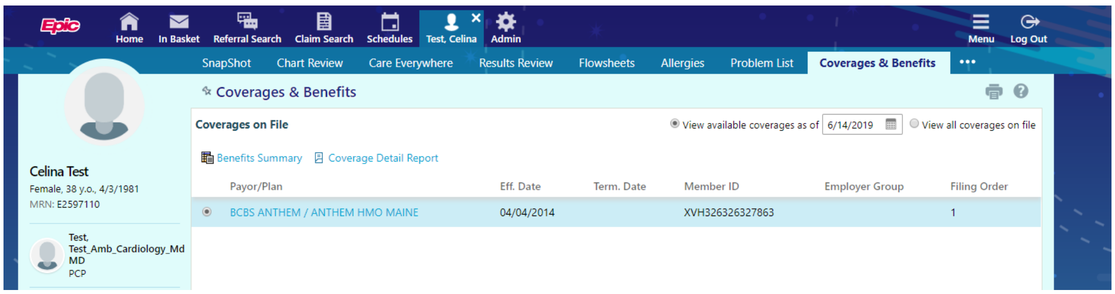


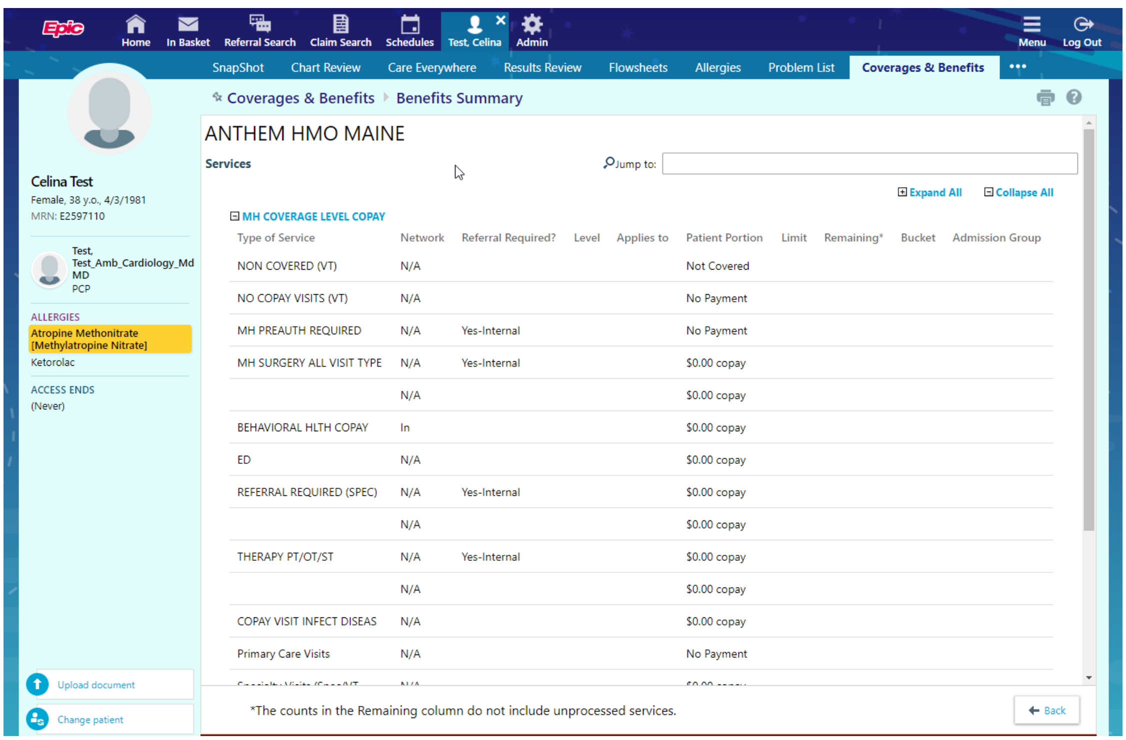
View patient's billing information

To view information about the patient's eligibility for health plans, coverages, service areas, networks, and more, select the **Patient** tab and click **Billing Info**. You can expand and collapse the sections in the Services section and use the **Jump to** search bar to find specific services.

You can also see details about a particular coverage on the Benefits Summary page to:

- Determine whether a particular service is covered in or out of network.
- Determine whether a coverage is active.
- Determine whether benefits for a particular service are metered and what the limits are for each level of benefits.
- Determine what the patient portion will be for a particular service.
- Review a complete summary of benefits.



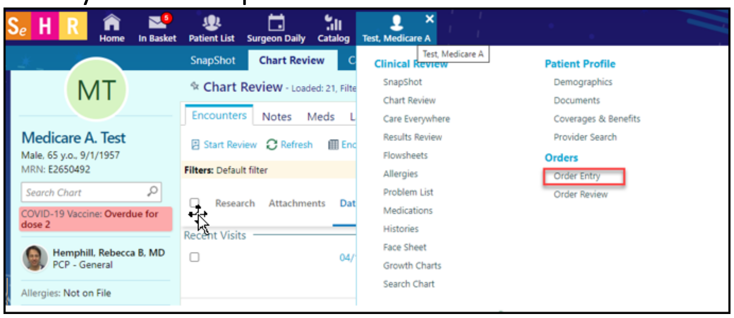


Orders

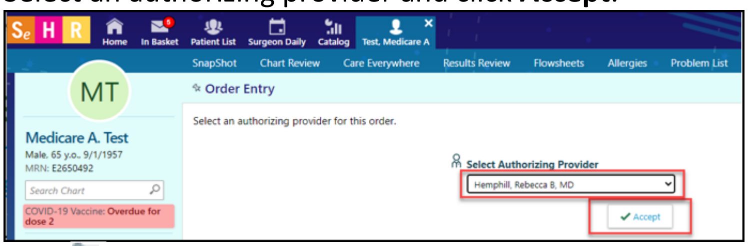
Placing Orders

If you are enabled to place orders, follow the instructions below.

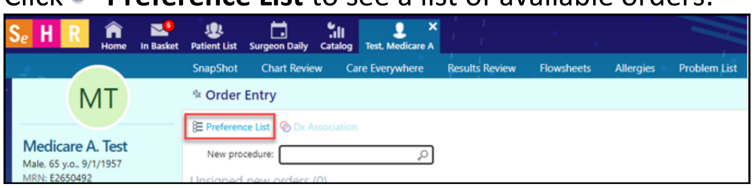
1. Place your mouse pointer on the **Patient** tab and click **Order Entry**.



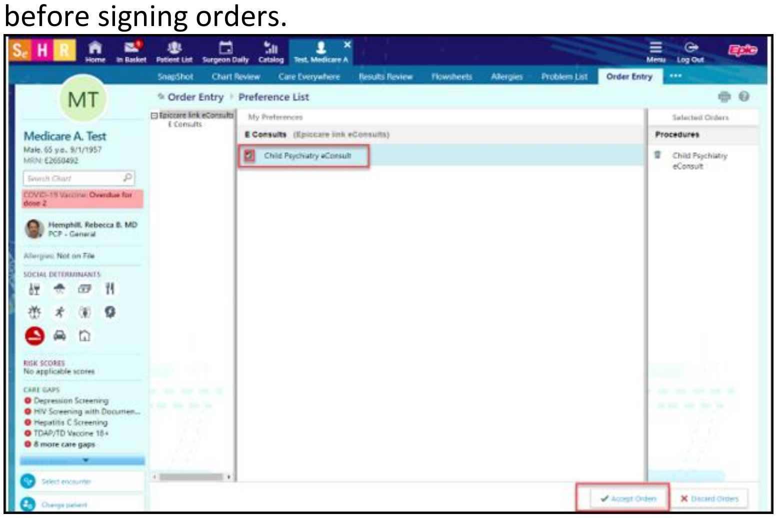
2. Select an authorizing provider and click **Accept**.



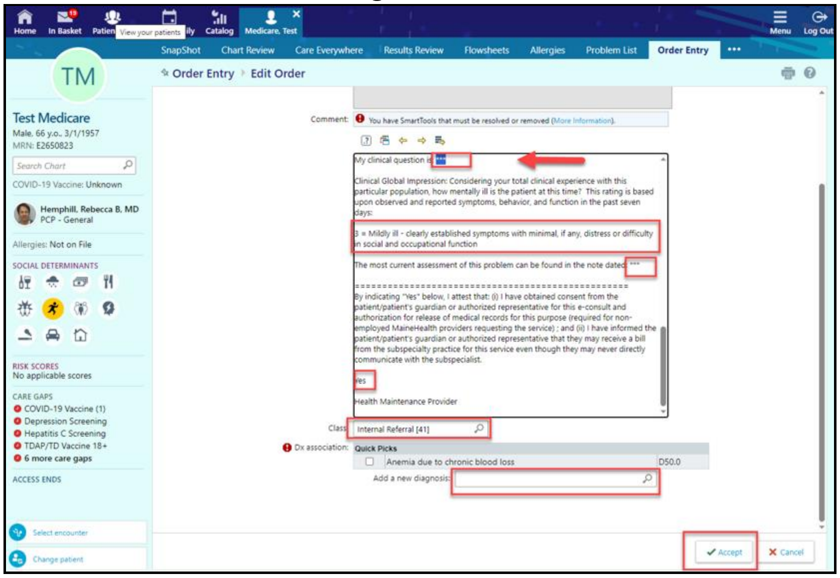
3. Click **Preference List** to see a list of available orders.



4. Select the check box next to each order that you wish to place. You can use the subsections in the left pane to filter orders by type.
5. Click **Accept Orders** to review a list of your orders and make any necessary changes to the order detail before signing orders.



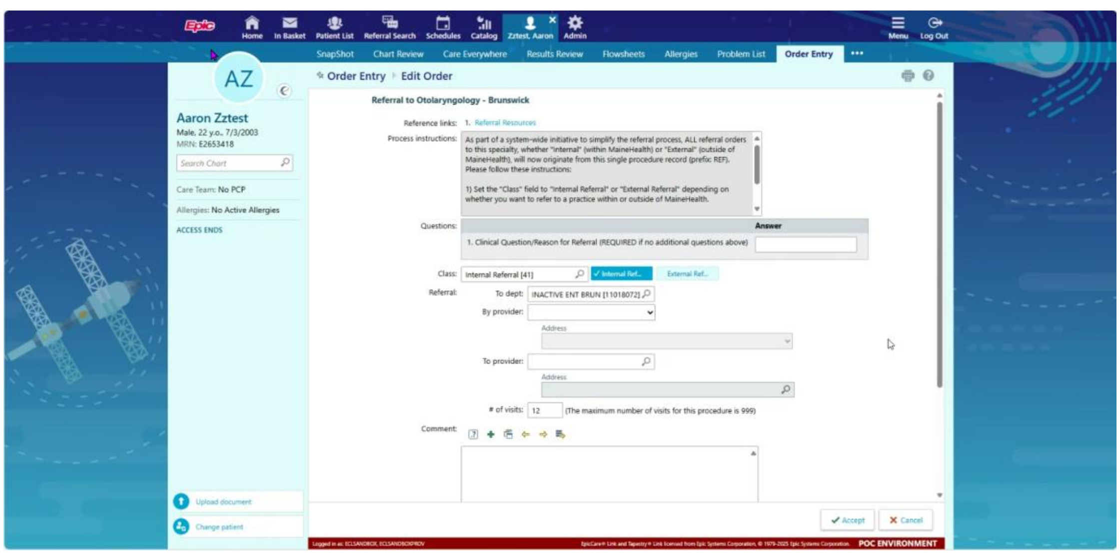
6. For orders such as eConsult orders, place your mouse in the dialog box and click to activate. Press F2 on your keyboard to move through the SmartLinks. When you get to the *** that is a space holder for you to type in your clinical question. Select F2 again to continue moving through the note. When you come to lists from which to choose from right click to pick the appropriate choice, left click to have that choice stick in your note. Continue to use the F2 key to move through the note. The order class should default to **Internal Referral** (correct class) and choose the appropriate diagnosis to associate the order with. You can search for diagnoses or add a new one.



7. Click **Accept** and **Sign Orders**.
8. Enter your password if prompted and click **Accept**.

All users will come to Preference List and will place orders that way

** Class and Referral sections will be set up systematically



Save an Order for Later

Pend an order to save it for later. For example, you might pend an order if you need to review information in the patient's chart before you finish filling out the order details.

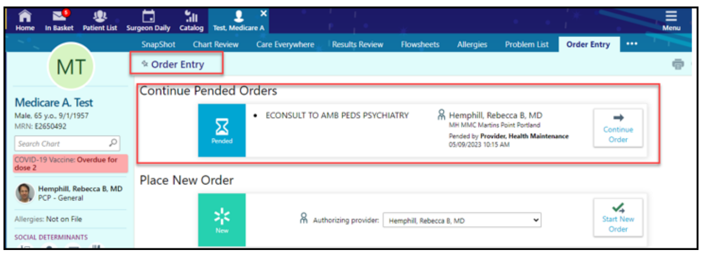
From the Order Entry activity, select the order that you want to place.

1. Click the order name to edit its details as needed.
2. Click **Pend Orders**.

Continuing a Pended Order

When you return to the Order Entry activity, you can resume any orders that you have pended. You can also see orders that are in a pended status by other people at your site. For example, you might have support staff who prepared an order for you to sign.

Click **Continue Order** to resume editing a pended order.



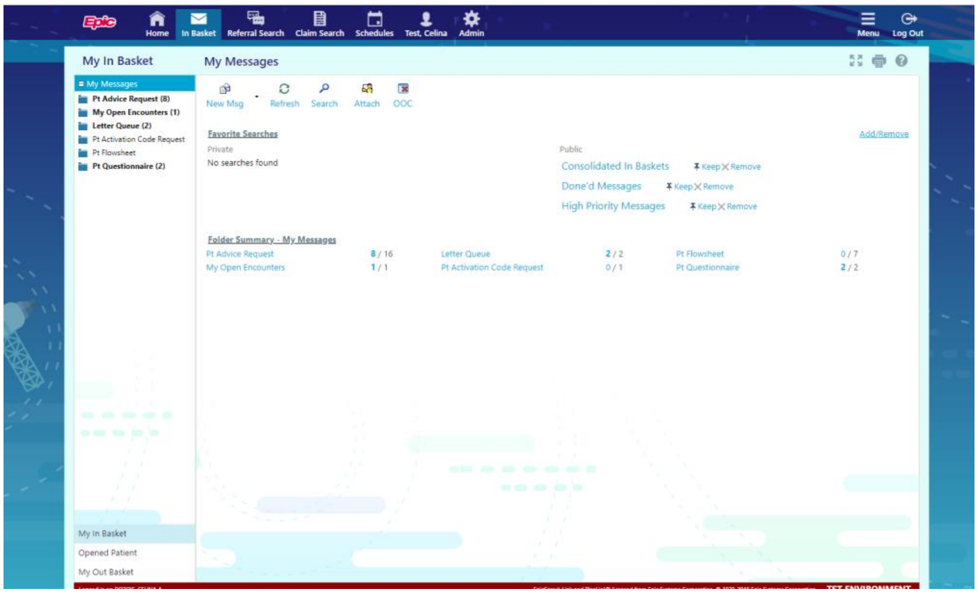
Cancel a Signed Order

1. Select the **Patient** tab and click **Order Review**.
2. Select the Order and click **Cancel Orders**.
3. Enter a reason for canceling the order and click **Accept.**

In Basket - Viewing Messages

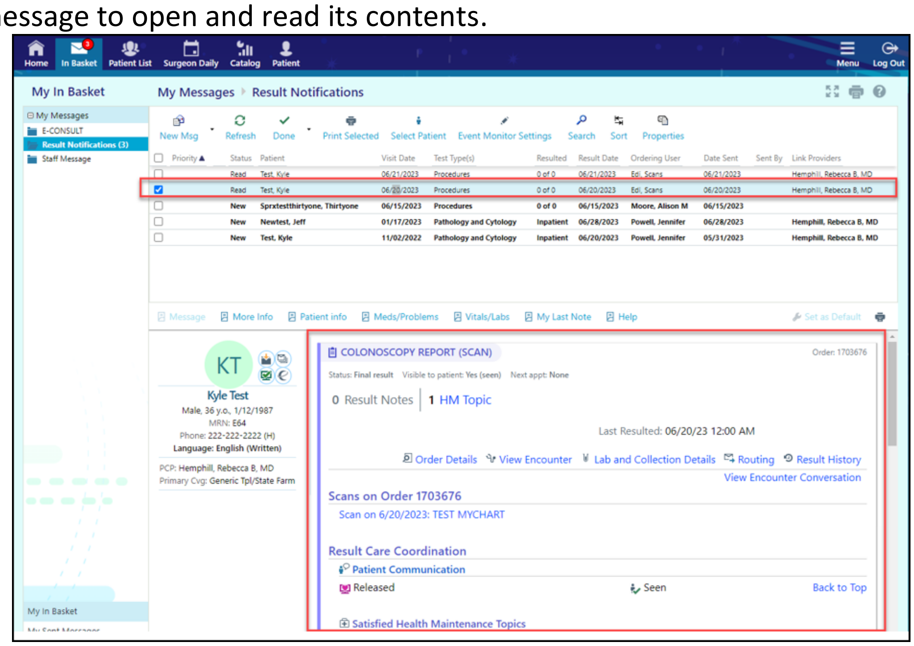
In Basket is a quick and easy way to communicate with your colleagues. From here, you can view and sort messages, search for messages based on a number of criteria, and respond to your messages.

Select the **In Basket** tab to access your messages. Folders that group types of messages appear in the left pane. For example, you might see **CC'd Charts** or **Referral Authorization** folders. If you have new messages, the folder title appears in bold, and the number of new messages appears in parentheses next to the folder name. If you have a new high-priority message, the folder appears with a red arrow.



View a Message

1. Select the folder for the type of message you want (for example, **Result Notifications**).
2. Select a message to read its contents.
3. Double click a message to open and read its contents.



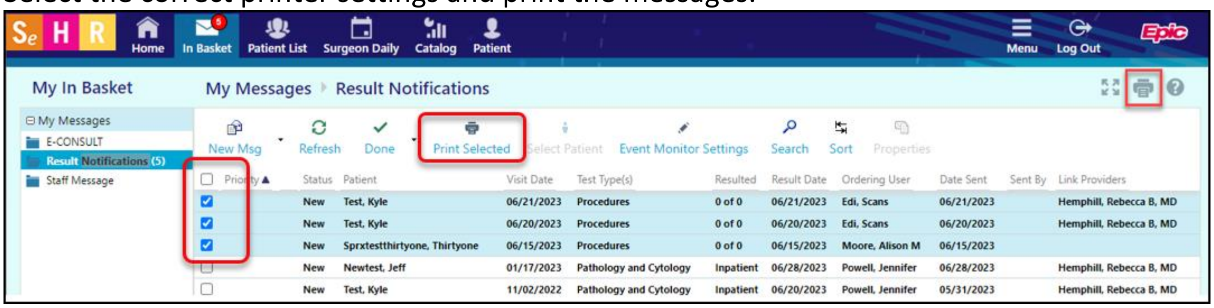
Search for a Message

1. Click Search.
2. Enter as many search criteria as you want and click **Search**. You can search by patient, message type, status, recipient, priority, date, or any combination of these.
3. To return to your normal In Basket view, click **My In Basket**.

Print multiple messages at once

If you are working with a paper system, you can print multiple In Basket messages to keep on file. Note that you can print multiple messages at once only for certain message types.

1. Select the folder containing the messages that you want to print and click in the boxes of the messages you want to print.
2. Click **Print Selected**.
3. Select the correct printer settings and print the messages.

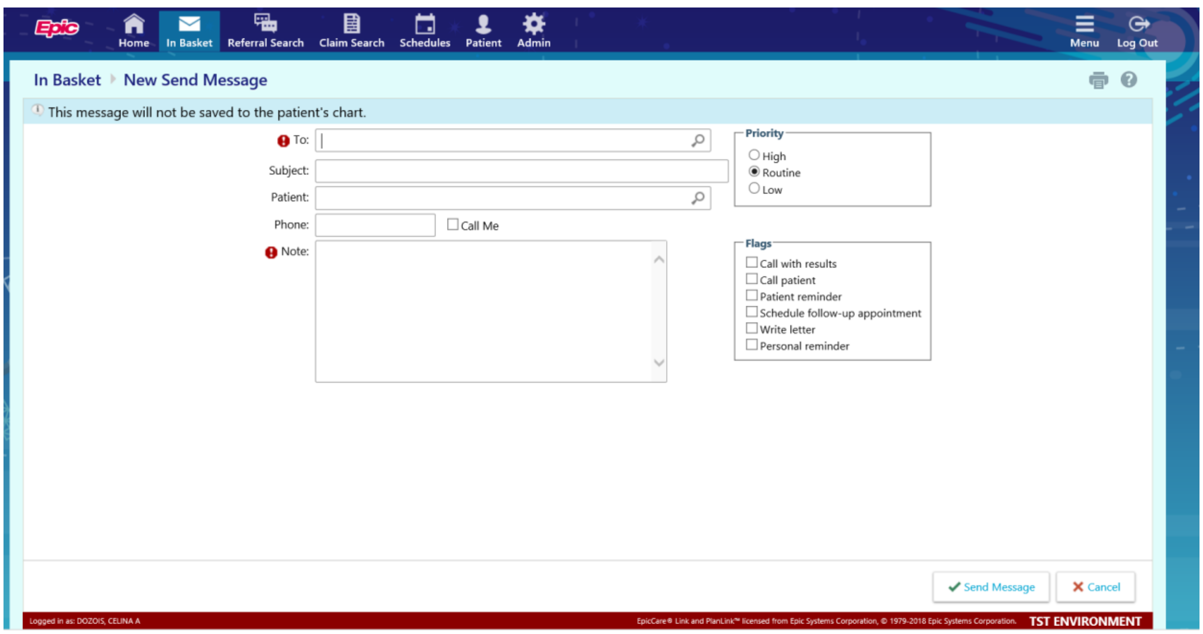


In Basket - Sending Messages

In Basket is a communication hub where you can send and receive secure messages similar to email. Messages are sent to individual recipients or to a number of recipients grouped in a class or a pool. You can also associate a patient with the message using the **Patient** field on the message form so that the recipient can refer to the patient's chart.

Send an In Basket message

1. Select the **In Basket** tab, click the arrow next to **New Msg**, and select the type of message you want to send.
2. In the **To** field, completion match on the name of the person or group to whom you would like to send your message. To see a list of all possible recipients, click .
3. Enter a brief subject in the **Subject** or **Summary** field.
4. If you are sending a message regarding a patient, either click **Use <patient name>** to pull in the patient's name, or search for a different patient. This attaches the patient's name to the message.
5. Complete any other required fields.
6. Enter your message in the **Note** field.
7. When you are finished, click ✔ **Send Message**.



Reply to or Forward a Message

Click a message to select it.

- To reply to a message, click **Reply**.
- To forward a message, click **Forward**.

Note: Reply and Forward options might not be available depending on the message you've received.

View Sent Messages

1. Select the **In Basket** tab and click **My Sent Basket**.
2. Select a message type and then select a particular message to view it.
3. To return to your In Basket, click **My In Basket**.