

New Site Account Request for Vidant CareLink



These instructions are for users requesting new site access to Vidant CareLink (aka Connect). If you are a user of an existing Vidant CareLink site please refer to the Manage My Clinic for Site Administrators - Tip Sheet or reach out to your CareLink site administrator.

We **REQUIRE** two Site Administrators per site

In your web browser, on the address bar, type: <https://carelink.vidanthealth.com> you are presented with Vidant CareLink Login Screen (Figure 1)

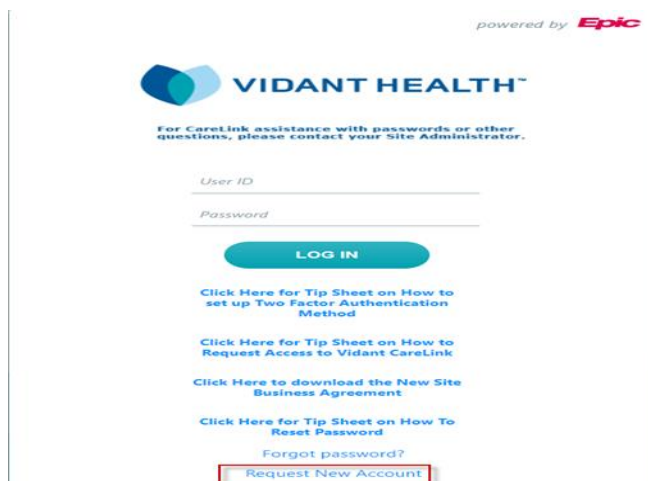


Figure 1: Vidant CareLink Login Screen

- Select [Request New Account](#) blue hyperlink on Login Screen. (Figure 1)
- Select Site or [Request access for a new site](#) and Continue. (Figure 2)
- Complete the Site Information by filling in all necessary fields. Any fields with a red exclamation mark is a mandatory field and must be filled out. Select Next or Cancel Request (Figure 3)

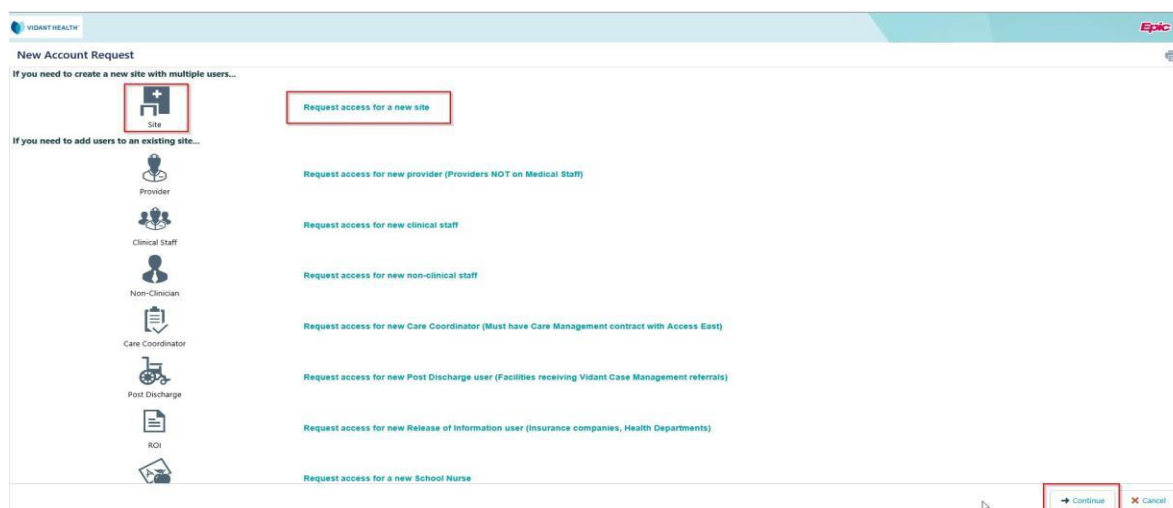


Figure 2: New Site Request

The screenshot shows the 'New Account Request' form in the Epic system, specifically the 'Site Information' tab. The form is divided into several sections: 'Site Information' with fields for Site name, Site type, Phone, Site NPI #, and a checkbox for Fax; 'Address' with fields for Address, City, State, ZIP, County, and Country; and 'Other' with a section for Attachments (10.0 MB Total Allowed) and a Comments field. At the bottom right, the 'Next' button is highlighted with a red box, and the 'Cancel Request' button is also visible.

Figure 3: Site Information

- Select User Type, by selecting the Icon or Request access for new clinical staff. (Figure 4)

The screenshot shows the 'New Account Request' form in the Epic system, specifically the 'Users > Add User' tab. The form prompts the user to 'Please choose one of the following options to add a user to your site'. It displays a list of user types with icons and corresponding request links: Provider, Clinical Staff (highlighted with a red box), Non-Clinician, Care Coordinator, Post Discharge, ROI, and School Nurse. The 'Request access for new clinical staff' link is also highlighted with a red box. At the bottom right, the 'Continue' button is highlighted with a red box, and the 'Cancel' button is also visible.

Figure 4: Add User

Help for selecting the correct User Type:

View only Users:

Provider: Non-Vidant Health Medical Staff, includes Advanced Practitioners and/or Mid-Level Providers.

Clinical Staff: Clinical support staff whom help manage patient care for the provider. Ex: RN, MA, LPN, LCSW


Non-Clinician: Non-clinical staff whom may more of an administrative role. Ex: Front Desk, PSR, Billing staff

Update Patient Chart User: (Site must have **Care Management** contract with Access East)


Care Coordinator: Clinical support staff whom work closely with Access East Care Managers for coordinating care.

Release of Information Users:

Post Discharge:

Once you select the access type, complete the **“Request”** by filling in all necessary fields. Any fields with a red exclamation mark  is a mandatory field and must be filled out.

If you would like to associate your provider and clinical staff please indicate this by including the provider’s name in the **Provider name** field.

If you would like this person to be the **“Site Administrator”** just select the box marked “Make this user a site administrator”. Do not forget to Submit your Request! 

You will receive an Account Request Confirmation page with a Reference # for you to refer to:

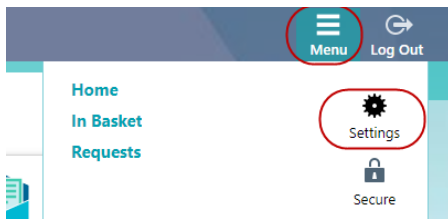
When requesting access for a Provider (Not part of Vidant Medical Staff) there are additional fields which will need populating.

Vidant CareLink Forgot Password

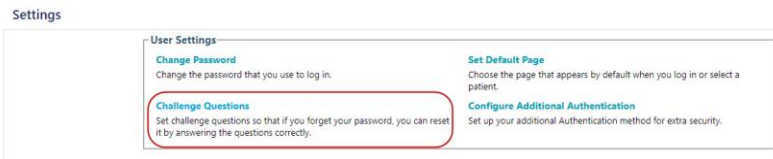
To reset your password from the CareLink Log In page you must first set up your Challenge Questions.

Log into CareLink

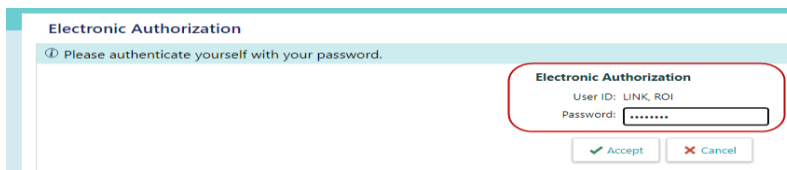
Click Menu - Click Settings



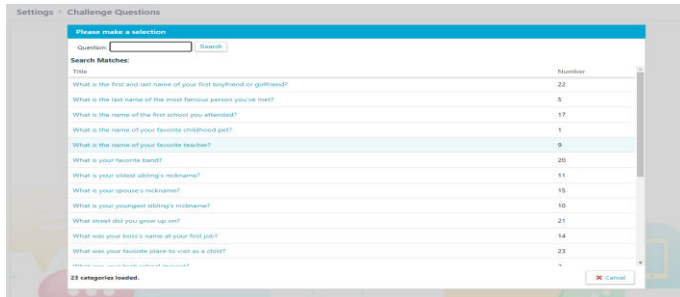
Click Challenge Questions



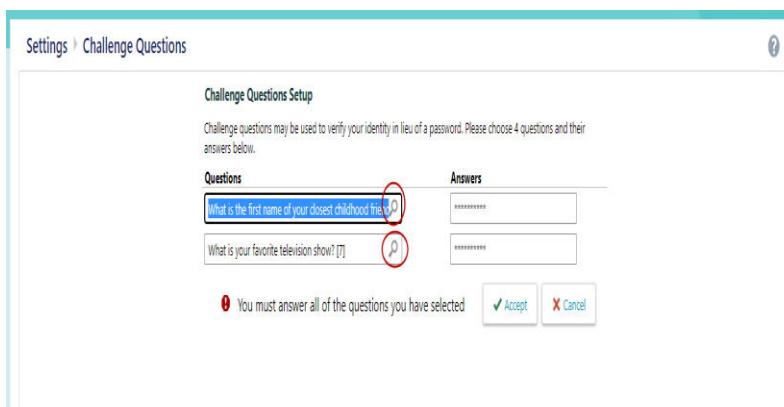
Enter your CareLink User Password



You can search the questions by clicking the magnifying glass in the question field.



Click the question you wish to use then type your answer in the Answers field.

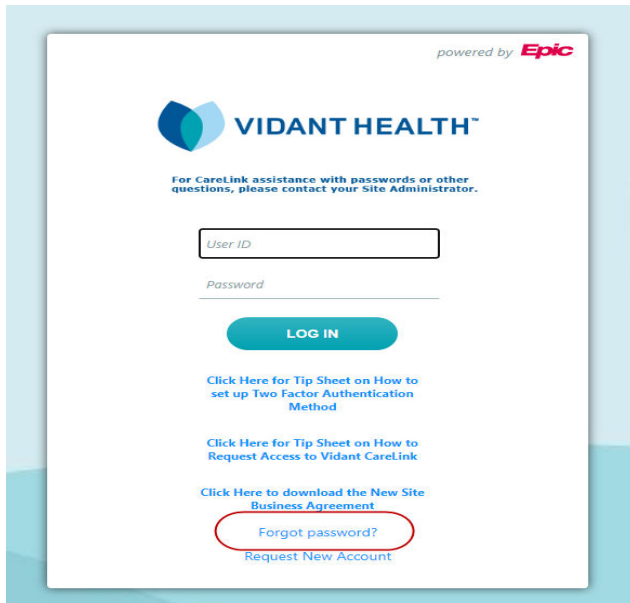


Once you have your challenge questions set up in CareLink you will be able to change your CareLink password.

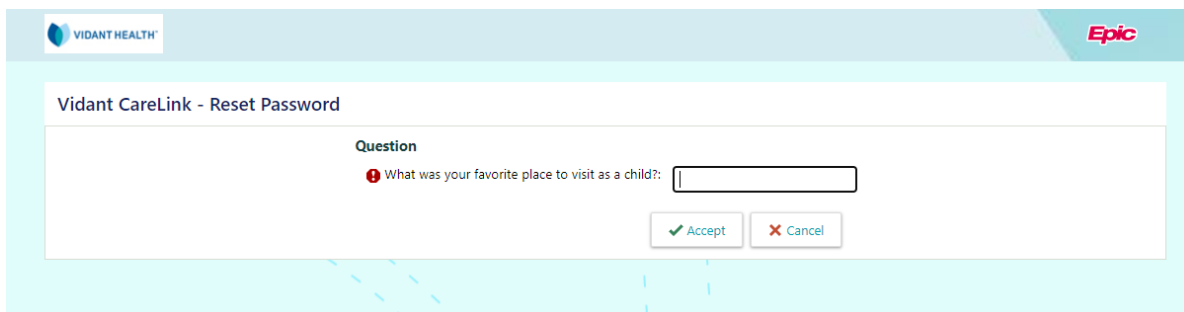
NOTE:

Users who will not be able to use the Forgot Password for CareLink are users who have inactive or blocked accounts due to not regularly logging in and users who schedule surgery through Vidant's Prep for Surgery. These users will need to contact their site administrator who will need to put in a request through CareLink's My Groups.

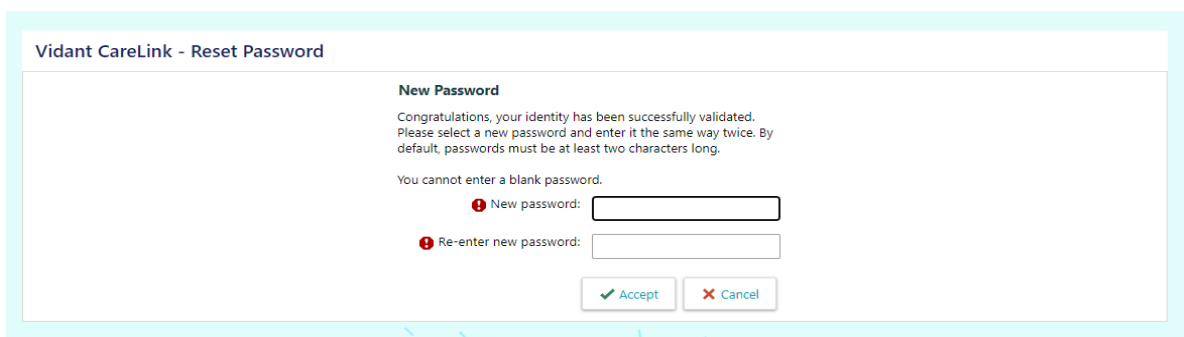
To change your password: Click Forgot password? On the CareLink log in page.

The image shows the Vidant Health CareLink login page. At the top, it says "powered by Epic". The Vidant Health logo is on the left. Below the logo, it says "For CareLink assistance with passwords or other questions, please contact your Site Administrator." There are two input fields: "User ID" and "Password". Below these is a blue "LOG IN" button. Under the button, there are three links: "Click Here for Tip Sheet on How to set up Two Factor Authentication Method", "Click Here for Tip Sheet on How to Request Access to Vidant CareLink", and "Click Here to download the New Site Business Agreement". At the bottom, there are two links: "Forgot password?" (which is circled in red) and "Request New Account".

You will answer the Challenge Question you set up in CareLink

The image shows the "Vidant CareLink - Reset Password" screen. At the top, there are logos for Vidant Health and Epic. Below the logos, the title "Vidant CareLink - Reset Password" is displayed. Underneath, there is a section titled "Question" with a red exclamation mark icon. The question is "What was your favorite place to visit as a child?:" followed by an input field. Below the input field are two buttons: "Accept" (with a green checkmark) and "Cancel" (with a red X).

Enter your new password and click Accept

The image shows the "Vidant CareLink - Reset Password" screen. At the top, there are logos for Vidant Health and Epic. Below the logos, the title "Vidant CareLink - Reset Password" is displayed. Underneath, there is a section titled "New Password" with a red exclamation mark icon. The text says "Congratulations, your identity has been successfully validated. Please select a new password and enter it the same way twice. By default, passwords must be at least two characters long." Below this, it says "You cannot enter a blank password." There are two input fields: "New password:" and "Re-enter new password:". Below these are two buttons: "Accept" (with a green checkmark) and "Cancel" (with a red X).

You can now log into CareLink with your new password.

Two-Factor Authentication

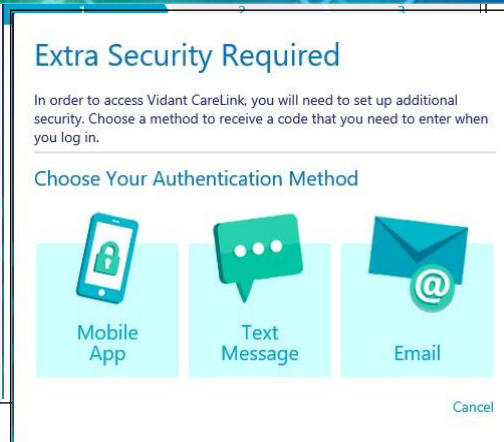
TIP SHEET



Logging in with a username and password is vulnerable to phishing and other methods by which malicious or unauthorized users can gain access to your web applications. To implement an extra layer of security, Vidant Health has implemented two-factor authentication, which requires community users to enter their standard username and password plus a randomly generated one-time passcode to log into Vidant CareLink.


Please review all three methods options.

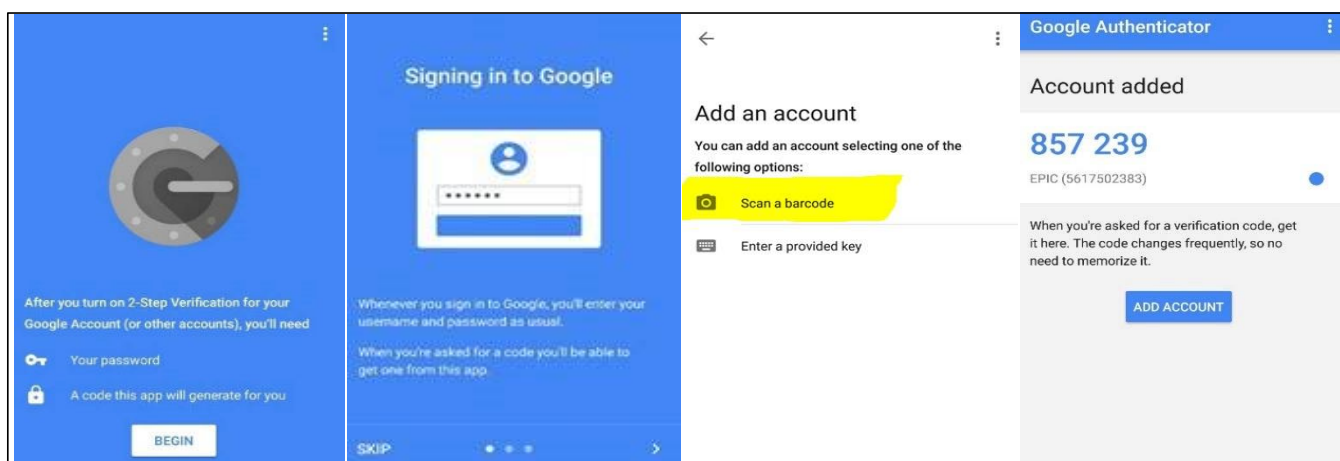
1. Enter your username and password. An “Extra Security” box appears.
2. Choose the method you want to use to authenticate.



Mobile App Method

1. Scan the QR code on the monitor screen. If you do not have a QR code reader on your phone, download one of the two apps recommended, Google Authenticator or Authy.
2. Follow the screen prompts to complete the authentication setup.

 For purposes of this instruction, we provided screenshots of the steps involved with downloading Google Authenticator. (Do not download Google Authenticator OTR.) You do not need to sign into Google to be provided with a code. Click SKIP at the second screen.



Text-SMS Method

1. Enter your mobile phone number with no dashes and select Next.
2. Enter the code sent to your phone as a text message and select Verify.

The screenshot shows a web form titled "Set Up SMS Authentication" with a progress bar at the top indicating step 1 of 3. Below the title, it says "Enter your phone number where you will receive authentication codes." There is a text input field labeled "Phone number". At the bottom right, there are two buttons: "Back" and "Next".

The screenshot shows a web form titled "Confirm Authentication" with a progress bar at the top indicating step 2 of 3. Below the title, it says "Enter the code we just sent to ***B5". There are two buttons: "Re-send Code" and "Change Phone Number". Below these is a text input field labeled "Security Code". At the bottom right, there are two buttons: "Back" and "Verify".

Email Method

1. Enter an email address for which you want to receive the authentication code and select Next button.
2. Log into the email account where you requested the code be sent. An email from connect@vidanthealth.com with a subject line of "Vidant CareLink Authentication Passcode" will be in your inbox.
3. Open the email, copy the code and enter it into the code box and select Verify button.

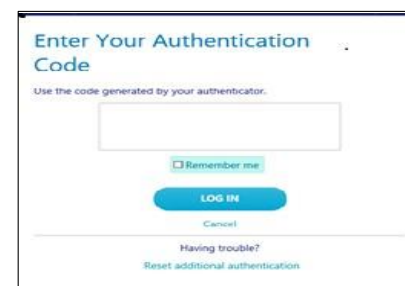
The screenshot shows a web form titled "Set Up Email Authentication" with a progress bar at the top indicating step 1 of 3. Below the title, it says "Enter the email address where you will receive authentication codes." There is a text input field labeled "Email Address". At the bottom right, there are two buttons: "Back" and "Next".

The screenshot shows an email interface with the following details:
From: connect@vidanthealth.com [mailto:connect@vidanthealth.com]
Sent: Wednesday, September 25, 2019 10:26 AM
To: I [>](mailto:@vidanthealth.com)
Subject: Vidant CareLink Authentication Passcode

Please enter your verification code: 062349

After Completion of any method

A message box to keep your code safe will appear. Check the box to acknowledge you have secured your code. Click the Finish button.



The next time you log into Vidant CareLink, the authentication code will be sent using the method you chose. Enter the code and select the “Remember me” button. Choosing "Remember me", will eliminate the need to authenticate for 30 days.