

# Site Administrator Tip Sheet

## CareLink



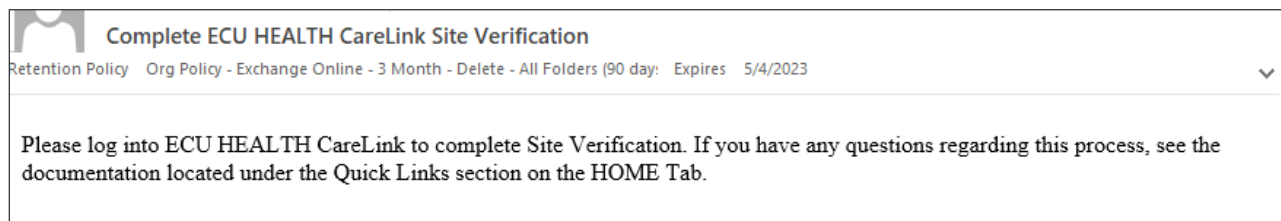
Site Administrators are responsible for maintaining their practices ECU Health CareLink account to ensure all users who have access are still with their group. It is best practice to have two Site Administrators per site.

### Try It Out

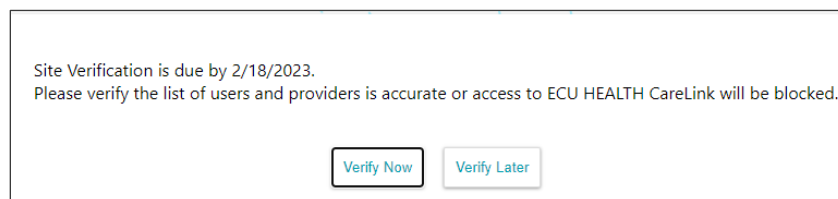
#### Site Verification

Site Administrators are required to log into their CareLink account once every 90 days to complete a Site Verification. An auto generated email is sent to Site Administrators when the Site Verification is due and it must be completed within 10-days. If the Site Verification is not completed within the 10-day window, all user access will be suspended until completed.

1. The auto generated email will to inform Site Administrators that a Site Verification is needed.



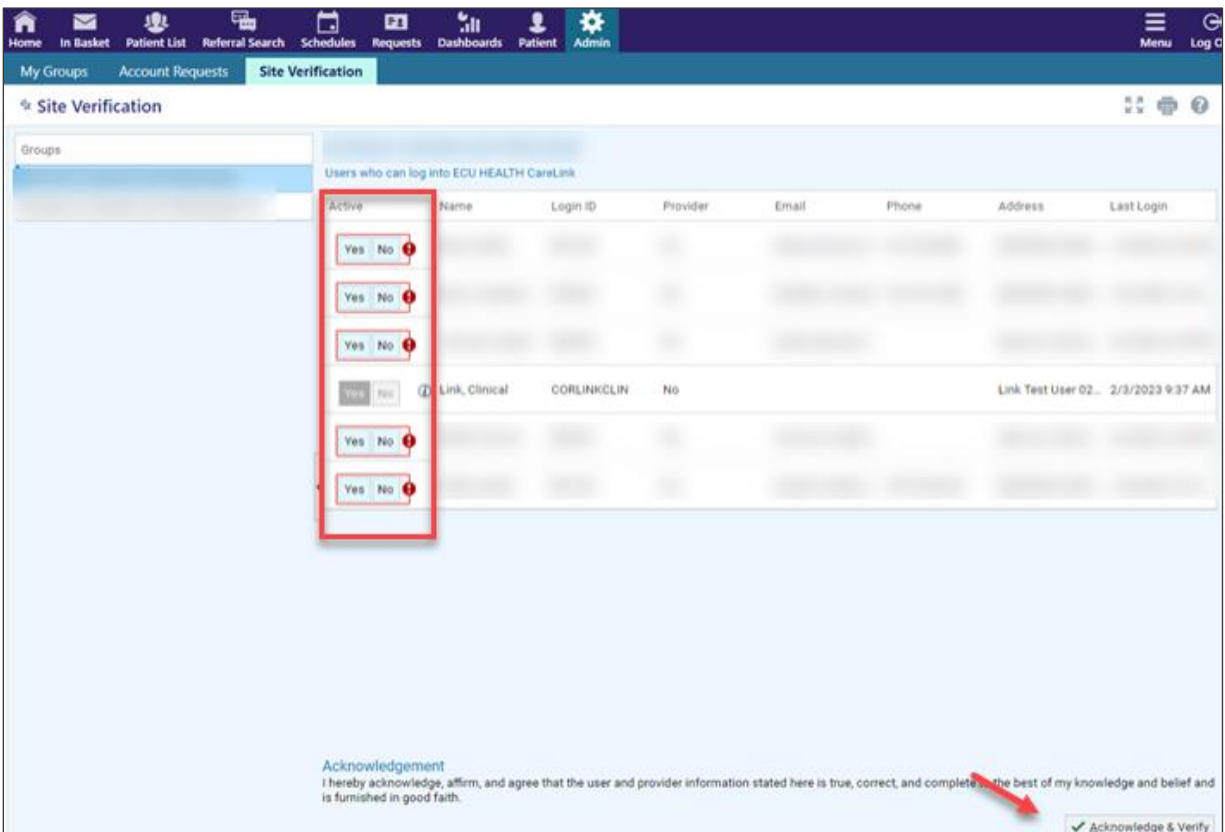
2. When logging into CareLink when Site Verification is due, the Site Administrator will be prompted with the following message and should select **Verify Now**.



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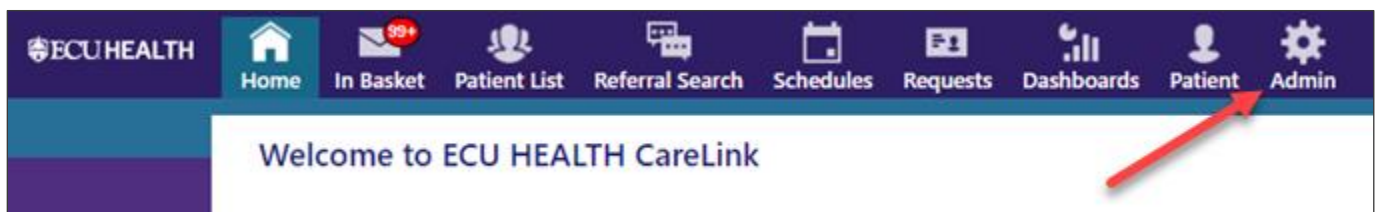
3. During the verification process, one of the two Site Administrators is responsible for verifying all users linked to the site to ensure those who have access are still with the clinic.
  - a. To do this, the Site Administrator will select **Yes** or **No** in the *Active Column* by each user's name.
  - b. Once all users are reviewed, select **Acknowledge & Verify**.



## Account Resets & Deactivation

Site Administrators can reset a user's password, two-factor authentication setting, update email address, and unblock or deactivate a user all from one screen.

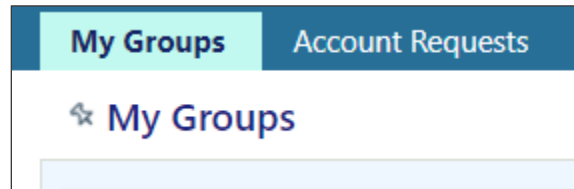
1. To update any of this information, the Site Administrator will need to select the Admin icon from the homepage.



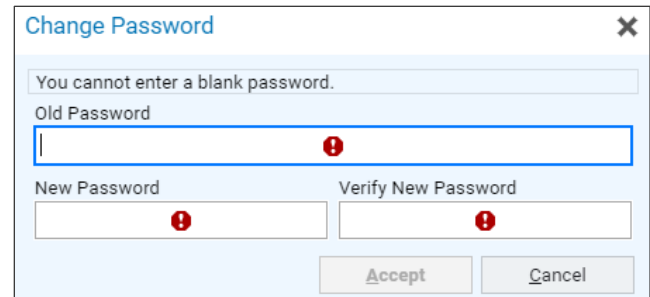
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2. It should land on the **My Groups** tab where all users are listed.

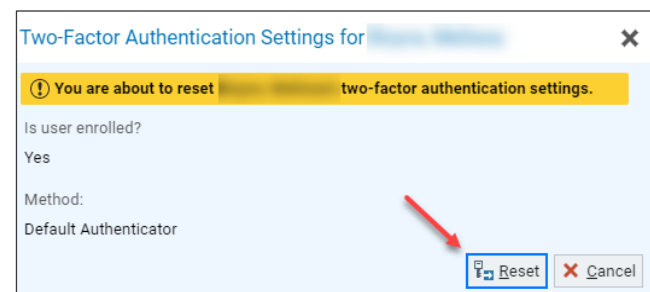


3. Find the user's name and on the far right, there will be three icons listed.  
a. For password resets, select the **Key** button.



The 'Change Password' dialog box contains the following elements: a close button (X) in the top right corner; a message 'You cannot enter a blank password.'; an 'Old Password' input field with a red exclamation mark icon; 'New Password' and 'Verify New Password' input fields, both with red exclamation mark icons; and 'Accept' and 'Cancel' buttons at the bottom.

- b. For two-factor authentication resets, select the **Key & Arrow** button. The user will receive an email notification that the two-factor authentication was reset and upon logging in, they will be prompted to re-enroll and select which method they wish to use.

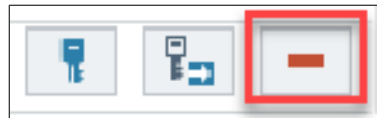


The 'Two-Factor Authentication Settings' dialog box features a yellow warning banner at the top that reads 'You are about to reset two-factor authentication settings.' Below this, it asks 'Is user enrolled?' with 'Yes' selected. Under the 'Method:' section, 'Default Authenticator' is listed. At the bottom right, there are 'Reset' and 'Cancel' buttons, with a red arrow pointing to the 'Reset' button.

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c. To deactivate a user, select the **Minus** button.



The 'Deactivate' dialog box contains a yellow warning bar at the top that reads 'You are about to deactivate'. Below this, there are fields for 'User ID', 'User Group', and a 'Comment' text area. At the bottom right, there are two buttons: 'Deactivate' (with a minus icon) and 'Cancel' (with an X icon). A red arrow points to the 'Deactivate' button.

d. If a user has a lock in front of their name, they will also have an unlock symbol on the far right. To unblock their account, select the **Unlock** button.



The 'Unblock Davis, Nakeia' dialog box features an information icon and the text 'Login block reason: Inactive for too many days'. Below this, it asks 'Do you want to unblock [redacted]?' with a question mark. At the bottom right, there are two buttons: 'Unblock' (with a padlock icon) and 'Cancel' (with an X icon). A red arrow points to the 'Unblock' button.

e. To change a user's email address, select their name in the **My Group** list.

The user profile edit form shows the 'Email' field highlighted with a red box. Other fields include 'Days Between Email Notifications', 'Notification Preferences' (with checkboxes for unread messages and group events), 'Addresses/Phone Numbers' (with an 'Edit' button), 'Phone', and 'Address'. At the bottom right, there are two buttons: 'Accept' (with a checkmark icon) and 'Cancel' (with an X icon). A red arrow points to the 'Accept' button.

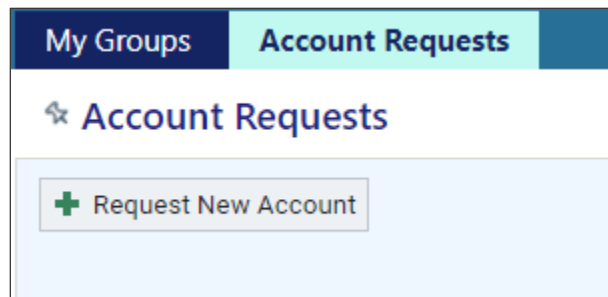
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### New Account Requests

Site Administrators are required to requests new accounts to team members and providers. Account requests requested by anyone other than the Site Administrator will be rejected.

1. Select the **Account Requests** tab and then **Request New Account**.



2. Select the appropriate type of user account.

**Add a user to an existing site**

Choose a type of user to create:

- Clinical Staff**  
Request access for new clinical team members and referral coordinators who need access to enter/transcribe clinical content including procedural orders
- Non-Clinician**  
Request access for new administrative (medical records, office manager, front desk) team members and referral coordinators who do not need access to enter/transcribe clinical content including procedural orders
- ROI**  
Request access for new Release of Information user (Insurance companies, Health Departments, DME companies, Medical Transport)
- Post Discharge**  
Request access for new Post Discharge user (Facilities receiving Vidant Case Management Service Requests)
- Care Coordinator**  
Request access for new Care Coordinator (Must have Care Management contract with Access East)
- Insurance Payer**  
Request access for new Insurance Payer
- Research Monitor**  
Request access for new Research Monitor
- School Nurse**  
Request access for a new School Nurse (Pitt County)
- Provider**  
Request access for a new provider

**NOTE:** For users who need to submit referrals or radiology orders, please request **Clinical Staff** access.

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3. Complete all required fields.
  - a. For providers who do not need access but need to be linked to the site, please select the box under *Basic Information*.

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

**Site Information**  
User group:

**Basic Information**  
 This provider doesn't need to log into this application. Add the provider to this site, but don't create a login account.  
Date of birth:  Work e-mail:   
Work phone:   
User Address: Address:   
City (or ZIP):   
State:  ZIP:   
County:   
Country:

**Credentials**  
 Non-U.S. credentials  
NPI #:  License #:   
License state:   
Specialty:

**Associated Providers: List the providers this user works with**  
Provider name:

**Link OIG Check-Provider**  
 Is this Provider in good standing with OIG (Office of Inspector General)?

- b. If a new user needs to have Site Administrator access, select the box at the end of the form prior to submitting.

### 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

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- Once account request has been submitted, a confirmation page will appear and the request will also be listed in the Account Requests section.

My Groups **Account Requests**

✦ New Account Request ▶ Confirmation

Reference #: 89670751

### ACCOUNT REQUEST CONFIRMATION

**Thank you for your submitting your account request!**

Please print this page as your account request confirmation. We have opened a ticket on your behalf for additional access. This process will take approximately 7-14 business days to complete. We may contact you if we have additional questions. In the event that you still have not heard from us, please contact the number listed below and have your Reference number available.

**What To Do Next?**

**Existing CareLink Clinics:**

- Your site administrator will receive an in-basket message with your account information in 2-3 weeks.
- Your site administrator will provide you with your account information.
- Please reach out to your site administrator if you do not receive your account information within 2-3 weeks.

**New CareLink Clinics:**

- An email will be sent with the account information in 2-3 weeks.
- Navigate to the web site indicated in your email notification.
- Enter your user ID and password exactly as it appears in the notification.

Educational materials are located on the HOME tab under the "Quick Links" section.

If you have any questions or concerns, please contact the Vidant Health Service Desk at 252-847-5111 and ask your ticket be routed to the Vidant CareLink team.

Account Requests

+ Request New Account

Name	Status	Request Date	Email	Phone	Reference #
test, test	Pending	2/3/23	test@test.com	252-252-2525	89670751

New Account Request  
Reference #: 89670751  
Requested by: LINK, CLINICAL [CORLINKCLIN]

**User/Provider Information**

Non-Clinician

test, test  
User ID: (Unspecified)  
E-mail: test@test.com  
Phone: 252-252-2525  
DOB: 1/1/1985

User contexts: [blurred]

**Group Information**

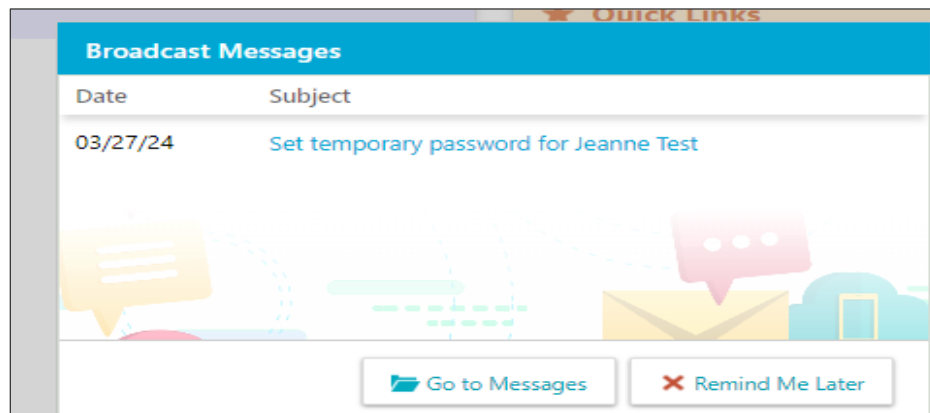
Existing Groups

Patient group: [blurred]  
ROI group: [blurred]  
Users/Providers: test, test

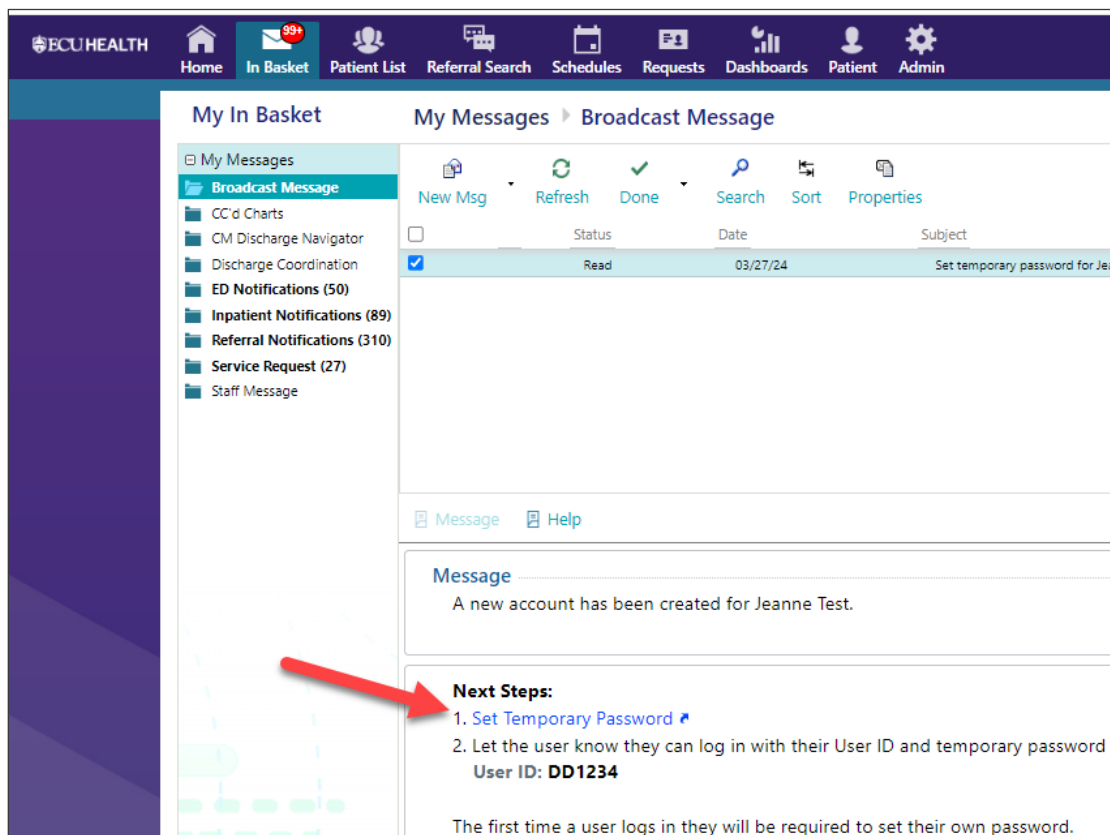
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- Once the account request has been processed, the Site Administrator that requested the account will receive the log in information via a Broadcast Message in CareLink.



- The site administrator can click on the blue hyperlink or “Go to Messages” button to be taken to the in-basket message.
  - Within the message, select the blue hyperlink in the message “Set Temporary Password” to set-up the password for the new user.

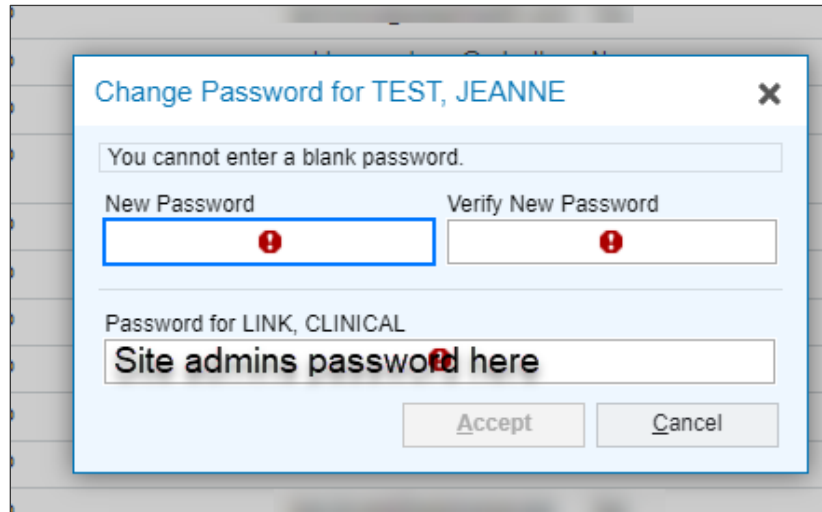




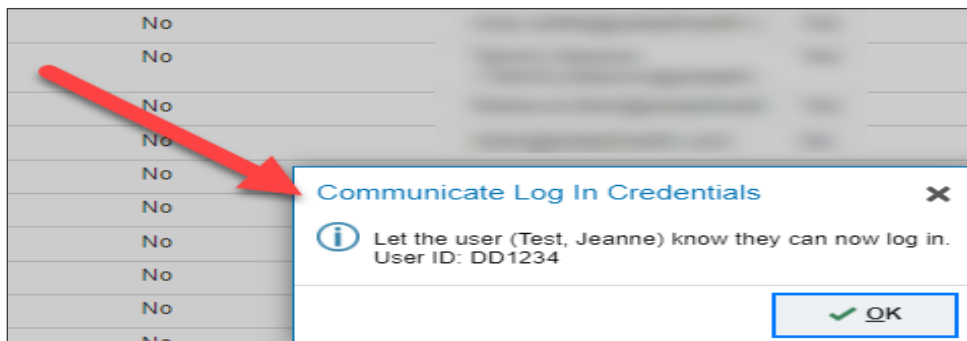
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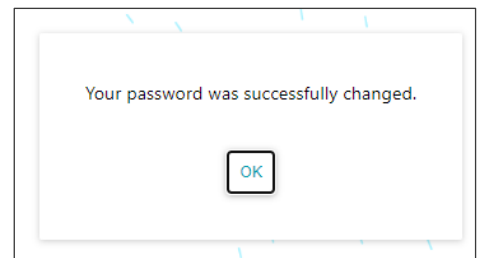
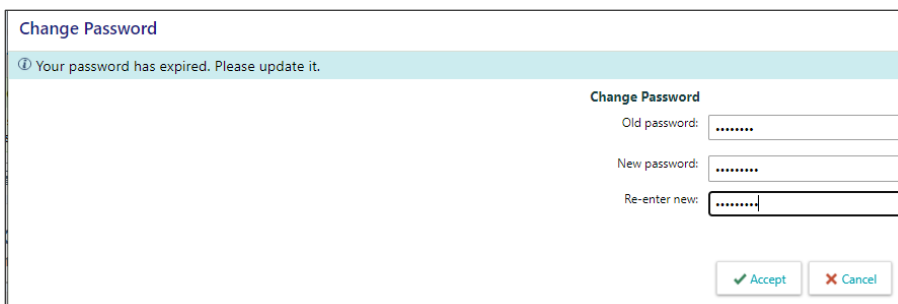
7. Enter a temporary password and verify new password. Then enter **your** password and select Accept.



8. Once the temporary password has been set, the Site Administrator must inform the user of their username and temporary password.



9. When the user logs in for the first time, they will be prompted to create a new password.



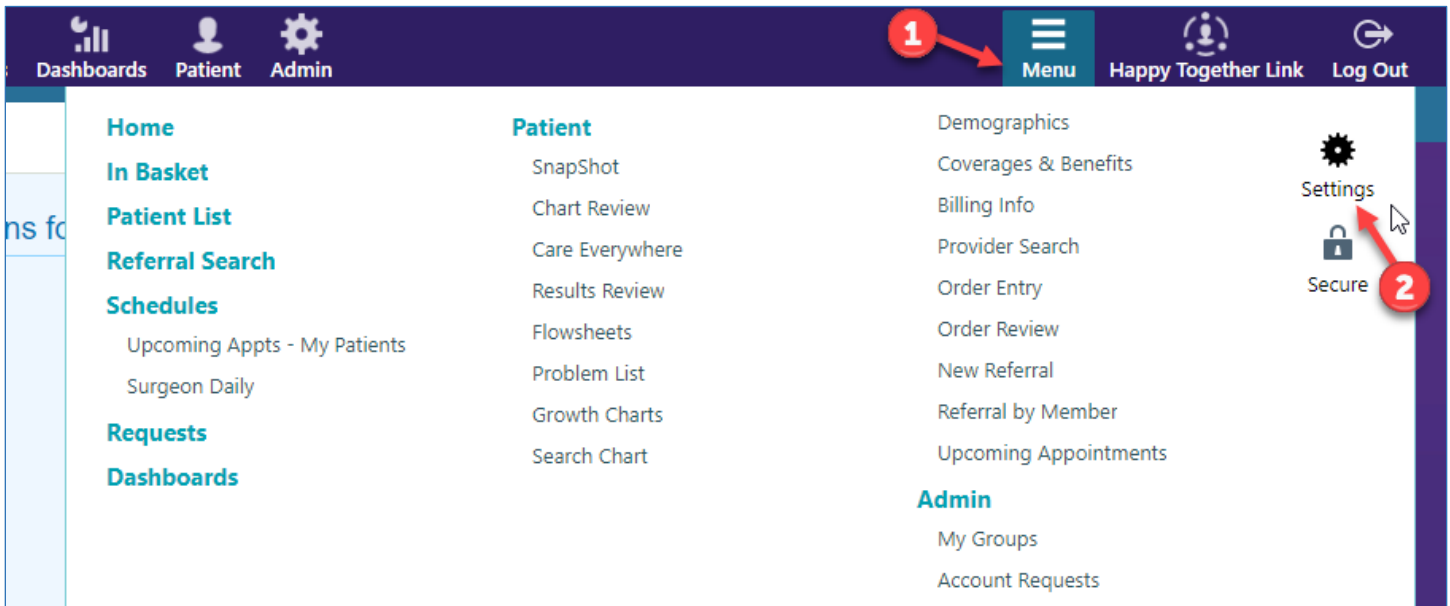
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### New Account Request Email Notification

To receive a notification email when a New Account Request has been completed, your Notification Preferences within the Setting section must be updated.



#### User Settings

<b>Change Password</b> Change the password that you use to log in.	<b>My Demographics</b> Update your demographics.
<b>Set Default Page</b> Choose the page that appears by default when you log in or select a patient.	<b>Challenge Questions</b> Set challenge questions so that if you forget your password, you can reset it by answering the questions correctly.
<b>Notification Preferences</b>  Choose which In Basket message types you would like to receive real-time notifications for.	<b>Reset Additional Authentication</b> Set up a new way to get passcodes.

#### Event Monitor Settings

**Event Settings**  
Manage your Event Monitor settings.

#### About

<b>Copyright</b> View additional copyrights and legal notices.	<b>Session Information Report</b> This report displays information useful for technical troubleshooting.
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Receive notifications for:

Staff Message	<input type="checkbox"/> Email
Orders	<input type="checkbox"/> Email
CC'd Charts	<input type="checkbox"/> Email
My Unsigned Orders	<input type="checkbox"/> Email
New Account Request	<input checked="" type="checkbox"/> Email
Service Request	<input type="checkbox"/> Email

A red box highlights the 'New Account Request' row, which includes a red circle with the number '4' and a mouse cursor pointing to the checked 'Email' checkbox.

**NOTE:** For issues related to CareLink, contact the HelpDesk at **252-847-5111** or the Physician Outreach team at [physicianoutreach@ecuhealth.org](mailto:physicianoutreach@ecuhealth.org).