

EpicCare Link Account Request and Activation through Okta

EpicCare Link is a tool that provides real-time web access to Epic patient information. If you do not have view-only Epic Hyperspace access and need to view patient information, you can access patient information from EpicCare Link.

a EpicCare Link Account request

Requesting access to EpicCare Link for the first time

1. In a web browser, navigate directly to **https://sailpoint.uwmedicine.org/identityiq/external/registration.jsf#/register**
2. Start by entering your email address
3. Click **Next**

i Do not use a shared group email address as the email will be your login ID.

i Once your account request has been submitted and approved with an account and password, all future access to EpicCare Link will go through okta.uwmedicine.org

i If you already received your activation email, please skip to section C.

i **Research Monitors**– Enter your request in the RAPID Portal <https://redcap.iths.org/surveys/?s=K93KPMJFYF>, email Research IT if you have questions, researchit@uw.edu

i For **Site Coordinators** entering requests on behalf of others, be sure to fill in the Group contact information at the end of the form.

1 <https://sailpoint.uwmedicine.org/identityiq/external/registration.jsf#/register>

UW Medicine: Enter Login ID

Email Address *

2

This will become your login ID. Do not use a shared group email address.

This field is required

Cancel
3 **Next**

EpicCare Link Account Request and Activation through Okta (Continued)

b SailPoint Form

1. Click your **user type** (Do NOT click on Research Monitor if you're not from UW Research IT)
2. Click **Next**
3. Fill out all Demographic information with **red asterisk (*)** and any form field that pertain
4. Under Identification, please enter at least 1 set of information for (State ID Number + State, Passport Number + Passport Country, or Employer Issued ID Number)
5. Under Provider Details (**not for research monitor**)— Please provide your Taxonomy code, NPI, Medical Degree, Medical License Number + State (Required **if you have any one of these**).

Role and their Capabilities:

Payer:

- View only access into patient's chart, medical & demographics information
Can access patients with Name, DOB, Zip, Gender

EMS:

- View only access into patient's demographics information
Can access patients with Name, DOB, Zip, Gender

Continuity of Care:

- View only access into patient's chart, medical & demographics information
- Can access patients with Name & DOB
If a relationship exists with patients in Epic (i.e. referring provider, PCP, attending, etc. or the EpicCare Link user is part of the patient's care team), the patient will automatically appear on the provider's list without having to manually type in their Name & DOB

Continued next page..

UW Medicine: Select User Type

Select external user type: *

- Clinical Provider - Continuity of Care (read-only)
- Emergency Medical Services (demographics only)
- External E-Consults (contracted entities only)
- Payer
- Research Monitor

This field is required

Buttons: Cancel, Back, Next (circled 2)

3 Demographics

First Name *

*Or name that appears on medical license

4 Identification

Enter at least one set below - State ID/License & State or Passport & Country or Employer Issued ID Number

5 Provider Details

Taxonomy Code

This field is required if you have one. (10 alphanumeric, ending with X, for example 207Q00000X)

NPI

This field is required if you have one.

Medical Degrees

EpicCare Link Account Request and Activation through Okta (Continued)

E-consult Providers (pilot users only):

- Only Capital Medical Centers are currently live on this
- View only access into patient’s chart, medical & demographics information
- Can access patients with Name & DOB
- Can create new patients in order to place e-consult orders
- Can place 3 e-consult orders in system (dermatology, rheumatology, endocrinology)

SailPoint Form (continued)

6. Click **Next**
7. Verify the information and click **Confirm** if fields are correct or click **back** to make changes
8. Read over the Privacy, Confidentiality, and Information Security Acknowledgement form. **(Not for Research Monitors)**
9. Click the **checkmark** if you agree to the terms and condition of use
10. Click **Submit**
11. Click **Done**.

i *Timeframe for approval process:*

- Approval will be between 1–5 business days.

Non-UW Medicine Workforce Privacy, Confidentiality and Information Security Agreement

Privacy, Confidentiality, and Information Security Acknowledgement

UW Medicine has a legal and ethical responsibility to safeguard the privacy of all patients and protect the confidentiality of their protected health information (PHI). Federal and state laws and regulations govern the privacy of our patients and their health information. In the execution of services by the organization, I will or may see patients with a variety of medical issues and/or may see and hear confidential information relating to these patients. This relates to information past, present and future physical or mental health or condition of an individual.

As a condition of accessing UW Medicine PHI, I understand and agree that:

- I will comply with federal and state statutory and regulatory requirements (including 45 CFR Parts 160 and 164 (HIPAA) and RCW 70.02).
- I agree to safeguard my UW Medicine access account, and password. I will not share my password with any other person and will not permit others to access the UW Medicine systems through my account. I understand that I will be held accountable for all accesses made under my login and password and any activities associated with the use of my access privileges.
- I will log out or lock computer sessions prior to leaving a computer.
- I understand that I am being given access to PHI and that my access will only occur according to the contract or agreement signed by UW Medicine and the company or healthcare entity I represent or in accordance with my role as a government investigator, auditor or site reviewer. The information disclosed under this agreement will be only used for the purpose(s) described in that contract, agreement or as needed for the investigation, audit or site review.
- I understand that my access will be monitored to assure appropriate use.
 - I understand that the Secretary of the Department of Health and Human Services or the Washington State Attorney General may investigate complaints and may seek criminal prosecution or impose civil monetary penalties to my company and/or me for inappropriate uses or disclosures of certain protected health information.
- I will limit my access, use, and disclosure of patient information to the minimum amount necessary to perform my authorized activity or duty. I understand that the patient information I access is confidential and will not copy or disseminate except as authorized or allowed or required by law. I will only discuss patient, confidential, or restricted information only with those who have a need-to-know and the authority to receive the information.
 - I will keep protected information taken off-site fully secured and in my physical possession during transit, never leaving it unattended or in any mode of transport (even if the mode of transport is locked). I will only take protected information off-site if accessing it remotely is not a viable option.
 - I will store all protected health information on secured systems, encrypted mobile devices, or other secure media.
 - I agree that if I terminate my position with the my company or no longer work in my current position, or otherwise am no longer functioning in the role under which access was granted, I, or my company, will immediately notify UW Medicine IT Services Help Desk at 206-543-7012 or email mcsos@uw.edu and request that my access be deactivated.
- I agree to abide by this agreement and understand that these are privileges granted by UW Medicine to me. I further understand and acknowledge that UW Medicine may terminate this privilege at any time.
- I will report all concerns about inappropriate access, use or disclosure of protected information, and suspected policy violations to UW Medicine Compliance (206-543-3098 or comply@uw.edu).

Thank you! Your request has been successfully submitted. You will receive notification when your account has been created. In the meantime, if you have questions or concerns: Research Monitors: Email researchchit@uw.edu, All Other Users: Email uwmedelink@uw.edu or phone (206)598-1709

EpicCare Link Account Request and Activation through Okta (Continued)

C User Activation

Once your account has been approved, you will get an Okta user activation email.

1. Review the email
2. Click **Activate Okta Account**
3. You will be taken to **okta.uwmedicine.org** to enter a new password
4. Enter your new password and Click **Change Password**
5. Click on the drop down menu to select a forgot password question and enter your answer.
6. Click **Create my Account**

- ① *If your request was not approved, please go over the email for the reason of rejection for the account request.*
- ① *If you have questions or concerns:*
 - **Research Monitors:** Email researchit@uw.edu
 - **Issues with Account Activation:** Email uwmedeclink@uw.edu or phone (206)744-9269
 - **Issues with Finding Records in EC Link:** email eclinkhelp@uw.edu

UW Medicine C Identity and Access Management

1 Welcome to UW Medicine Okta User Activation

Automatically-generated email from Okta

Hi [REDACTED]

UW Medicine is using a new system, known as Okta, to manage access to patient records via EpicCare Link for care provided after Mar. 27, 2021. Watch this short video to learn more: <https://www.okta.com/intro-to-okta/>

We automatically created a new user account for you. **Click the following link to activate your new UW Medicine account (ONLY DO THIS ONCE).**

Step 1 2 Activate Okta Account

3

New password

Repeat password

Change Password

Choose a forgot password question

What is the food you least liked as a child?

Answer

5

Create My Account

4 Sign Out

6

EpicCare Link Account Request and Activation through Okta (Continued)

User Activation (Continued)

7. Read over the **Terms and Conditions**
8. Click **Accept**

d Multi-factor Authentication (MFA) Email Setup

Multi-factor Authentication screen will appear and you will have a choice to pick for your multi-factor authentication method. In this step we will be using Email method. You can skip to Step E for Mobile App method.

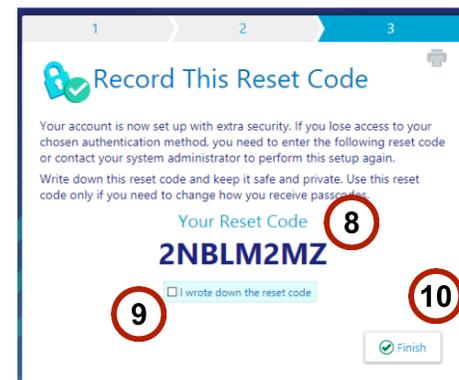
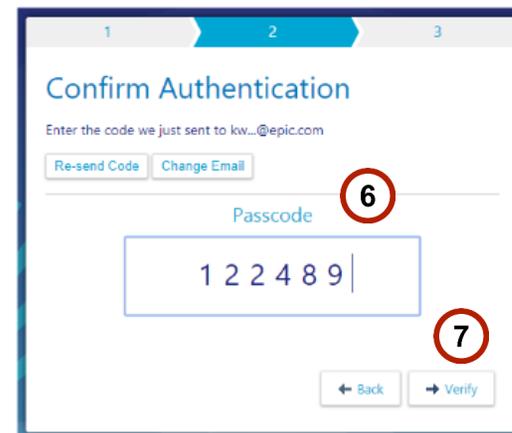
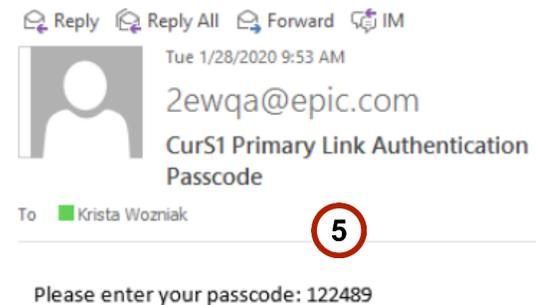
1. If selecting **Email Setup**
2. **Click** Email Logo
3. Enter the email address where you want the passcode to go (Can be your okta login email).
4. **Click** Next

EpicCare Link Account Request and Activation through Okta (Continued)

Multi-factor Authentication MFA Email Setup (Continued)

5. You will get an Authentication Password email sent to the email address entered in the previous step.
6. Take the **passcode** from the email and type it into Step 2 of the email MFA setup under Passcode
7. **Click** Verify
8. If successful you will prompted with your Reset Code. Please **save** and keep your reset code safe.
9. **Click** the check box “I wrote down the reset code” once done.
10. **Click** finish and you will be taken in to EpicCare Link.

ⓘ *The next time you log out and back into EC Link, you will be prompted to complete the 2FA by entering the password sent to your email again. If you click “Remember Me” on the login screen, it will save your authentication for 30 days (repeat every 30 days).*



EpicCare Link Account Request and Activation through Okta (Continued)

e Multi-factor Authentication (MFA) Mobile App Setup

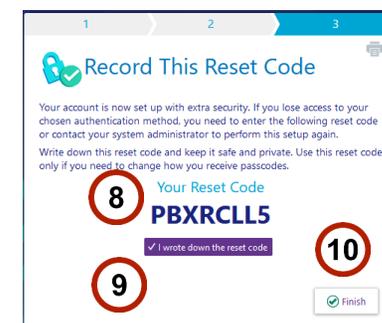
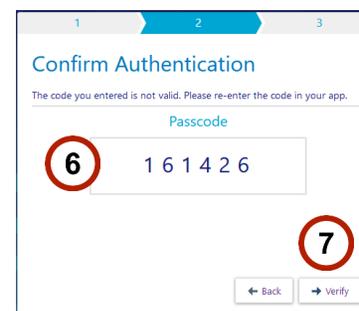
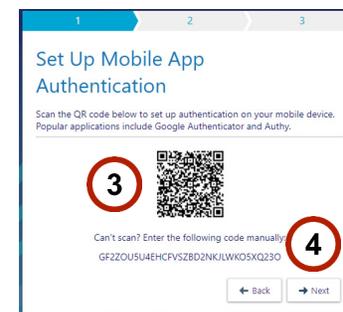
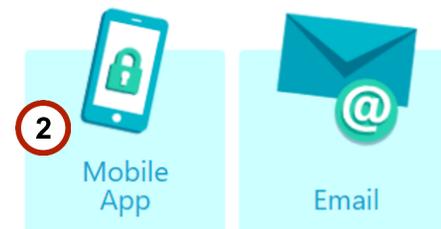
Multi-factor Authentication screen will appear and you will have a choice to pick for your multi-factor authentication method. In this step we will be using Mobile App method.

1. If selecting **Mobile App**
2. **Click** Mobile App Logo
3. Scan the QR code on your mobile phone and mobile authenticator of choice. (Examples on bottom for authenticators to use)
4. **Click** Next
5. **Check** your Mobile authenticator app for the code
6. **Enter** the code on the Confirm Authentication screen
7. **Click** Verify
8. If successful, you will prompted with your Reset Code. Please **save** and keep your reset code safe.
9. **Click** the check box “I wrote down the reset code” once done.
10. **Click** finish and you will be taken in to EpicCare Link.

i Examples of mobile authenticators

- Epic Authenticator ([Android](#), [iOS](#))
- Microsoft Authenticator ([Android](#), [iOS](#))
- Google Authenticator ([Android](#), [iOS](#))
- Duo Mobile ([Android](#), [iOS](#))
- Symantec VIP Access ([Android](#), [iOS](#))

1 Choose Your Authentication Method



EpicCare Link Account Request and Activation through Okta (Continued)

f Multi-factor Authentication Login Prompt

Multi-factor Authentication screen will appear to enter your passcode.

1. **Enter** the passcode from your authentication of choice that you set up earlier.
2. **Click** Login
3. You will be taken to EpicCare Link

i Always Log out when leaving your workstation unattended.

i If you click "Remember Me" on the login screen, it will save your authentication for 30 days (repeat every 30 days).

