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.

**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](https://sailpoint.uwmedicine.org/identityiq/external/registration.jsf#/register)
2. Start by entering your email address
3. Click Next

**Tips**

1. Do not use a shared group email address as the email will be your login ID.
2. 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
3. If you already received your activation email, please skip to section C.
4. 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
5. For Site Coordinators entering requests on behalf of others, be sure to fill in the Group contact information at the end of the form.
EpicCare Link Account Request and Activation through Okta (Continued)

**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

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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.

Timeframe for approval process:
- Approval will be between 1–5 business days.
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

If your request was not approved, please go over the email for the reason of rejection for the account request.

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

Welcome to UW Medicine Okta User Activation

Automatically-generated email from Okta

Hi [Username],

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

Activate Okta Account

Choose a forget password question
What is the food you most lived as a child?
Answer

Create My Account
User Activation (Continued)

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

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
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).
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.

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)
Always Log out when leaving your workstation unattended.

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

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

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