UPMC | IDENTITY MANAGEMENT SYSTEM

Add a Non-Employee as an EpicCare Link User

Overview

The Identity Management System (IMS) application request tools enable UPMC managers/ account sponsors to submit online user account requests for specific UPMC computer applications.

The process for requesting EpicCare Link user access in IMS has been simplified and customized for ease of use.

- Request EpicCare Link application access for staff
- Add A Non-Employee as an EpicCare Link User
- EpicCare Link Account Specifications
- Handling Duplicate Identities
- Next Steps in the Process

Request EpicCare Link application access for staff

1. Go to IMS at https://ims.upmc.com.

2. In the left hand menu, click **Request > Application Access > App Request For Others.**

    a. Search for existing users based on first name, last name, middle initial, and/or network ID. **NOTE:** *multi-user requests are not supported.* Select a single user and click **Proceed.**

    b. If the user does not have access already, add EpicCare Link to your cart. Next to EpicCare Link, click **Add.**

    c. Or, if the user does have EpicCare Link access, you can modify or revoke existing access as needed by selecting those functions. When you are ready to continue, click **Proceed to Checkout**.

    NOTE: EpicCare Link is dependent upon UPMC Network access. If the user you are requesting for does not already have Network access, the Network application will be automatically added to your cart when you attempt to checkout.
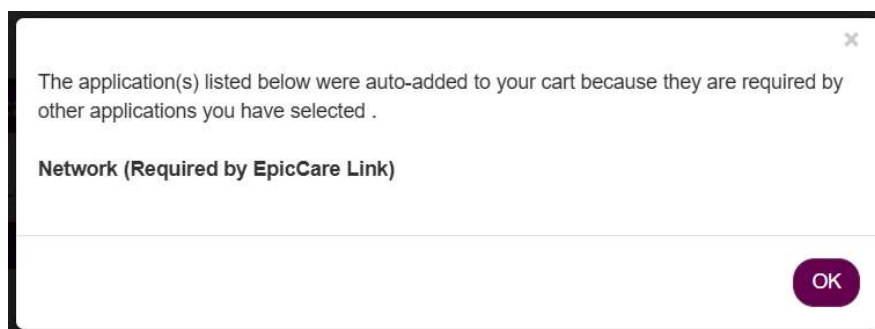
    d. If Network access is needed, complete the **Network** screen that appears. All fields noted with an asterisk * are required.

- **Network ID:** a value will be generated for you
- **Attach To Organizational Unit:** Select an appropriate OU. When requesting Network access with EpicCare Link, an OU will be preselected based on your manager's OU.
- **Comments / Special Instructions:** Please note that adding comments may delay the completion of your request.

5. When you have completed the form for Network, **click the arrow button at the bottom** (highlighted above) to continue to the **EpicCare Link** application request form.

- **Job Category:** depending on which job category you select, you may be asked for additional information about the requestee.
- **Will this person be scheduling surgical cases?** Select Yes or No.
- When you have completed the form for EpicCare Link, click **SUBMIT.**

Add a Non-Employee as an EpicCare Link User

1. Go to IMS at https://ims.upmc.com.

2. In the left hand menu, click **Request > Add EpicCare Link User.**

3. Under **New EpicCare Link User** form, complete the Getting Started screen (step 1). Indicate if you are adding a site administrator and if you intend to be the sponsor of the new user. Click **Next** to continue.

When provisioning a site administrator, the newly created non-employee account will automatically receive a site admin role in IMS that will allow them to request additional users. This eliminates the need for the sponsor to delegate privileges to the site admin.

4. If you (the requester) will NOT be the sponsor of the new EpicCare Link user, a search box will appear to allow you to select the proper staff person to be sponsor. Enter one or more search terms and click **SEARCH**.   In the results, click on the person to be sponsor. **This sponsor can be any UPMC Employee.**

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5. The sponsor selected will appear on the form. Click **Next to continue**.

NOTE: *If you (the requestor) have the Site Administrator role in IMS, you will not be asked to select a sponsor. Instead, your manager will be automatically assigned as the sponsor for the newly created non-employee account.*

6. A Prerequisite Check (step 2) will automatically confirm sponsor account setup and a notification will display briefly.

7. Following verification, the User Information (Step 3) screen will appear. All items noted with an asterisk * are required. **NOTE:** *Submit name **as it appears on the drivers license to avoid issues with help desk identity verification.***

8. Read and check the acknowledgement check-box, then click **Submit**. An Identity Validation (step 4) will automatically confirm that the user identity does not already exist. If no duplicate account is detected, a notification will display briefly.

NOTE: If any of the user information entered duplicates an existing user, *a notification will display. You will be asked to change or edit the information on the previous screen, or to create a new E-Sign-On identity for the user. More information on* [Handling Duplicate Identities](#) *can be found below.*

9. The information you entered will be automatically displayed to Review & Submit (step 5). After confirming, click **Submit** to continue. To make changes, click **Back**.

EpicCare Link Specifications

1. The EpicCare Link screen will appear next. Choose a job category. Type to search by job category name. Indicate if the user will be scheduling surgical cases. Both fields are required. Click **SUBMIT** to continue.

2. A notification will display that the request submitted is pending until the user acknowledges the UPMC Staff Access Agreement. This is sent to them at the personal email address provided in the steps above.

Request in Pending State

Your request has been placed in a pending state and will remain in that state until Test, Testa T acknowledges the UPMC Staff Access Agreement. As a result of this request an email has been sent by IMS to Test, Testa T requesting their acknowledgement.

OK

3. Click **OK** to view the approval workflow. Note that Network access is added automatically. Click on the Approval Flow icons for details.

Tracking Number: # NEWREQ-08152025112131-18b2e38cdd0b476480dd6a6d7586

To review the approval flow, track or cancel one of the requests, please choose the appropriate action for that application.

Application Name	Approval Flow
EpicCare Link	
Network	

View All Requests   Process Another Request

4. To return to step 1 to add another EpicCare Link user, click **Process Another Request**.

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Handling Duplicate Identities

There are several scenarios that might cause your request to be flagged for a duplicate identity or a potential duplicate identity.

1. If the identifier you enter actually belongs to you, the requestor, you will not be allowed to proceed. Use the link provided to go back to the User Information step and provide an identifier type and/or number that belongs to the new user.
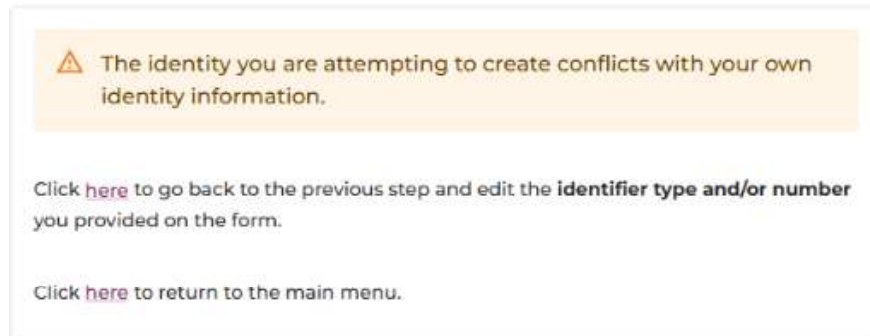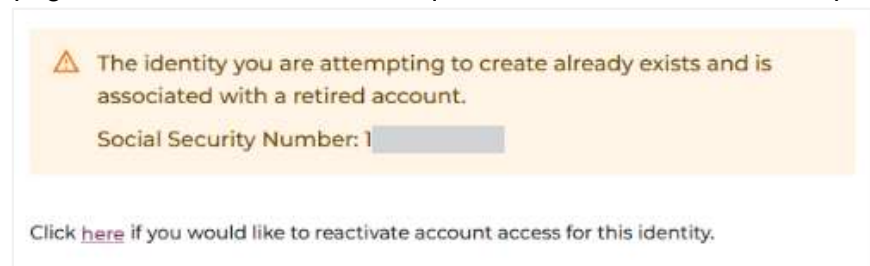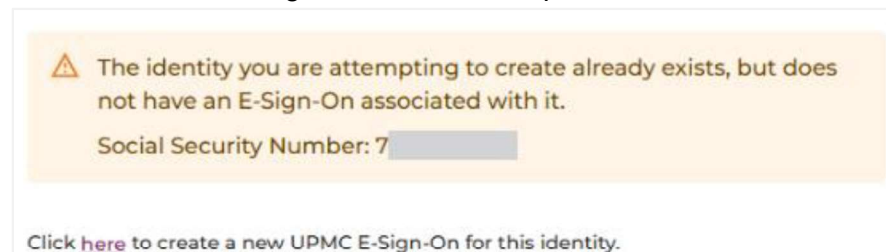
> ⚠ The identity you are attempting to create conflicts with your own identity information.
>
> Click here to go back to the previous step and edit the **identifier type and/or number** you provided on the form.
>
> Click here to return to the main menu.

2. If the identifier belongs to an existing retired account, you will be asked to leave the current page to submit a reactivation request for this user. Use the link provided.

> ⚠ The identity you are attempting to create already exists and is associated with a retired account.
>
> Social Security Number: 1
>
> Click here if you would like to reactivate account access for this identity.
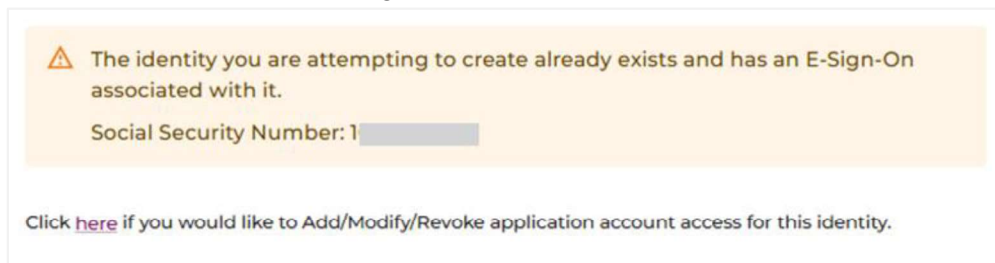
3. If the identifier belongs to an existing active account, but the account does not have an associated E-Sign-On record, you will be asked to leave the current page to submit a request to create a new E-Sign-On. Use the link provided.

> ⚠ The identity you are attempting to create already exists, but does not have an E-Sign-On associated with it.
>
> Social Security Number: 7
>
> Click here to create a new UPMC E-Sign-On for this identity.

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4. If the identifier belongs to an existing active account with an associated E-Sign-On record, you will be stopped and asked if you would like to modify (Add/Modify/Revoke) the application access for the existing user. Use the link provided.
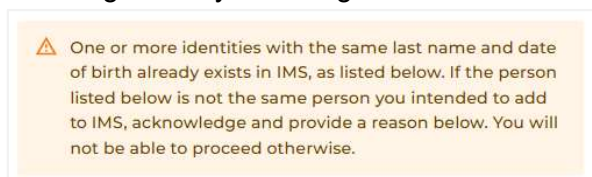
> ⚠ The identity you are attempting to create already exists and has an E-Sign-On associated with it.
>
> Social Security Number: 1▭▭▭▭▭
>
> Click here if you would like to Add/Modify/Revoke application account access for this identity.

5. If the last name and date of birth that you, the requestor, provided, matches an existing user in IMS, you will be asked to review a list of user identities with matching information. If one of the identities listed matches the user you are trying to create, you will be given the opportunity to leave the current page to modify (application access for that user. Click the **ADD/MODIFY/REVOKE** button.

   Alternatively, if none of the identities listed match the user you are trying to create, you can acknowledge this by checking the box and entering a reason. Click **Proceed**.

> ⚠ One or more identities with the same last name and date of birth already exists in IMS, as listed below. If the person listed below is not the same person you intended to add to IMS, acknowledge and provide a reason below. You will not be able to proceed otherwise.
>
> **RK** k▭▭▭▭▭ ▭▭▭▭▭▭
>
> Date of Birth: 19▭▭▭
> Department: M.▭▭▭▭▭▭
> Manager Email: c▭▭▭▭▭
> ESO ID: k▭▭▭▭
>
> **ADD/MODIFY/REVOKE APPLICATION ACCOUNT ACCESS FOR THIS IDENTITY**
>
> If you believe the user information you have provided does not match the user(s) above, please acknowledge by checking the box and providing a reason in the textbox below and then click the submit button.
>
> Note: Creating duplicate IDs is against UPMC policy and may result in revocation of your IMS request privileges
>
> ☐ * I acknowledge that the information I have provided is not a duplicate identity matching the account information listed above.
>
> * Reason

Next Steps in the Process
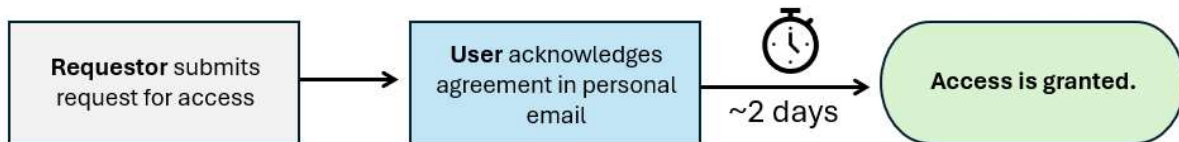
- **The new EpicCare Link user must acknowledge the staff access agreement.** This is sent to them via the personal email address provided during the request process.

- **Once acknowledged, the request will be processed usually within two days.** Once completed, the new user's first time credentials will be sent back to the same personal email provided previously.

- A copy of these credentials is also sent to the requestor (sponsor/site admin) in case the user does not receive them.

- EpicCare Link users should contact the Help Desk in case of login or account issues.

Additional Help

NOTE: IMS should **not** have multiple accounts for an employee or non-employee unless either has service accounts. Occasionally, duplicate accounts can result from the requestee failing to inform the requestor that they were previously employed at a UPMC facility. If duplicate accounts are suspected, place a ServiceNow ticket with IMS Support.

For further assistance, please contact the Help Desk at 412-647-HELP (4357). *Note that the Help Desk number may differ at your location.*

Document Information

Title: Add a Non-Employee as an EpicCare Link User

Date/Revision: 08/30/2025; Rev: 8.1

Audience: Site Admins for EpicCare Link Users

Intent: Instructions on how to add an EpicCare Link User to IMS.