



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 for existing non-employee accounts in IMS has been simplified and customized for ease of use.

- [EpicCare Link Role Descriptions](#)
- [Request EpicCare Link application access for Existing Users](#)
- [Add A Non-Employee as an EpicCare Link User](#)
- [EpicCare Link Account Specifications](#)
- [Handling Duplicate Identities](#)
- [Next Steps in the Process](#)

EpicCare Link Role Descriptions

Role	Description
Link Clinical Support Staff	These users are responsible for supporting clinical workflows in community clinics. This template is specifically designed for nurses and clinical support staff, there is a separate Job Category for MA's. Specifically, these users: - Search for or create patient records - View all patient clinical information - Place orders on behalf of their responsible provider - Communicate with patients and other staff
Link Site Administrator	These users are responsible for managing accounts at their community site and serve as the primary point of contact between the host organization and the EpicCare Link site. These users can be clinicians who perform patient care or staff whose primary responsibility is the management of a clinic. Specifically, these users have the ability to: - Verify the list of active users for the site, and request access for new users - Search for and create new patient records - View clinical information, place orders - Access analytical tools and reports
Link Medical Assistant	These users are responsible for obtaining basic patient information in a community setting and for supporting clinical workflows in community clinics as a Medical Assistant. - Search for or create patient records - View all patient clinical information - Communicate with patients and other staff
Link Physician/APP	These users are responsible for patient care in community clinics. Specifically, these users: - Search for or create patient records - View all patient clinical information - Place orders - Communicate with patients and other staff
Link Physician/APP and Site Administrator	These users are responsible for patient care in community clinics. Specifically, these users: - Search for or create patient records - View all patient clinical information - Place orders - Communicate with patients and other staff - Verify the list of active users for the site, and request access for new users - Access analytical tools and reports

(continues)

Link Continued Care And Services Coordinator	These users are responsible for supporting clinical workflows in community skilled nursing facilities, nursing homes, and community resources. Specifically, these users: - Review and accept or reject patients through the continued care and services request workflow - Search for or create patient records - View all patient clinical information - Place orders - Communicate with staff
Link EMT	These users are responsible for providing basic care while transporting patients to appropriate healthcare facilities. Specifically, these users: - Review clinical information before or during patient transport - Search for patients - Print Face Sheets to assist with billing for services
Link Biller	These users are responsible for reviewing medical services and associated charges for billing purposes. Specifically, these users: - Review clinical documentation for medical billing - View schedules for the providers they work with - View insurance coverage information These users do not take part in patient care and can't search for or create patient records.
Link Front Desk	These users are responsible for obtaining basic patient information in a community setting. Specifically, these users: - Search for patient records - Monitor office communications - Review orders - View all patient clinical information
Link Study Monitor	These users are external research monitors who review charts for patients on studies to ensure the quality and safety of the study. Specifically, these users: - Review patient charts - Can only view charts of patients the study coordinator has designated These users do not have the ability to search for patients, create new patients, place orders, schedule appointments, or send or receive messages.
Link Psych/Social Professional	These users are responsible for supporting clinical workflows as community psychologists, psychiatrists, and social workers. Specifically, these users: - Search for or create patient records - View all patient clinical information - Place orders - Communicate with staff

(continues)

Link School Nurse	These users are responsible for viewing basic clinical information so they may care for their students. Specifically, these users: - Search for patients - View select patient information such as allergies, medications, and preexisting health problems - Communicate with staff
Link Sports Medicine Clinician	These users are responsible for supporting clinical workflows in community sports medicine clinics. Specifically, these users: - Search for or create patient records - View all patient clinical information - Place orders - View upcoming appointments - Communicate with staff
Link Student Health Services Clinician	These users are responsible for supporting clinical workflows in community student health services positions. Specifically, these users: - Search for or create patient records - View all patient clinical information - Place orders - Communicate with staff
Link Detention Center Clinician	These users are responsible for supporting clinical workflows at community detention centers, jails, and correctional facilities. Specifically, these users: - Coordinate patient care - Search for or create patient records - View all patient clinical information - Place orders - View upcoming appointments - Communicate with patients and other staff
Link Requester	These users are responsible for viewing patient data which has been released to EpicCare Link by an HIM user. Specifically, these users: - Electronically review Releases of Information - Communicate with staff - Submit requests for additional Releases of Information
Link Care Coordinator	This template is only to be used for Healthy Planet Link Users.

Request EpicCare Link application access for Existing Users

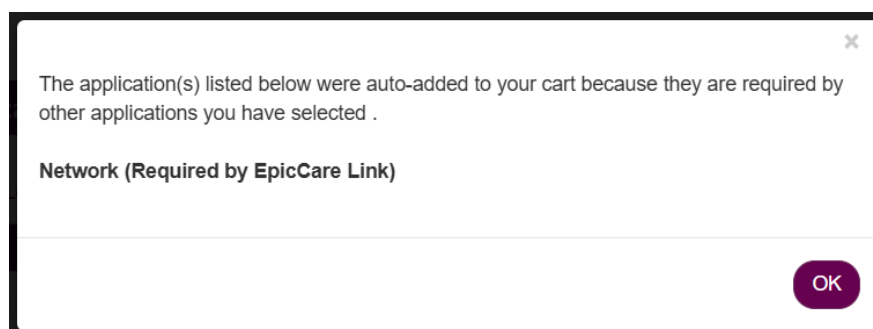
1. Go to IMS at <https://ims.upmc.com>.
2. In the left hand menu, click **Request > Application Access > App Request For Others**.
 - a. Search for existing users based on first name, last name, middle initial, and/or network ID. **NOTE:** *multi-user requests are not supported*. Select a single user 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. Click **OK**.*



- d. If Network access is needed, complete the **Network** screen that appears. All fields noted with an asterisk * are required.

The screenshot shows the 'Network' form within the 'EPICCARE LINK' application. The form has a header with 'NETWORK' and 'EPICCARE LINK' tabs. Below the header, there's a 'Network ID' field with the value 'hillmant2'. A 'REMOVE' button is in the top right. The main section is titled 'Network' and contains a dropdown menu for 'Attach To Organizational Unit (OU)' with 'UPMC Hillman Cancer Center' selected. Below this is a warning message: 'WARNING! Entering comments will delay the creation of a new network account. If you need to make a request with comments (like requesting access to a shared drive) please wait for the network account to be created first, then submit a network modification request with comments'. There is a large text area for 'Comments / Special Instructions'. At the bottom, there are navigation buttons: a left arrow, a right arrow (highlighted with a yellow box), and a 'SUBMIT' button.

- **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.

The screenshot shows the 'EpicCare Link' form within the 'EPICCARE LINK' application. The form has a header with 'NETWORK' and 'EPICCARE LINK' tabs. Below the header, there's a 'Job Category' dropdown menu with the placeholder text 'Type to search by job category name.'. Below that is a dropdown menu for 'Will this person be scheduling surgical cases?' with the placeholder text 'Select option'. At the bottom, there are navigation buttons: a left arrow, a right arrow, and a 'SUBMIT' button.

- **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 New Non-Employee as an EpicCare Link User and Request EpicCare Link Access

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). Click Next to continue.

New EpicCare Link User HELP

1 2 3 4 5

Getting Started Prerequisite Check User Information Identity Validation Review & Submit

Is the new EpicCare Link User you are provisioning going to act as the site administrator?

☐ Yes ☐ No

< Back **> Next** Submit

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 a sponsor to delegate privileges to the site admin.

(continues)

Search For Sponsor

First Name

Last Name

Middle Initial

Network ID

SEARCH

CLOSE

Search For Sponsor

First Name

Last Name ka X

Middle Initial

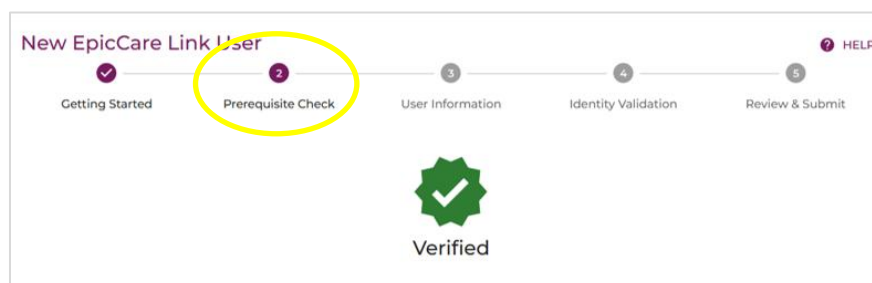
Network ID

SEARCH

Q

Name	Network ID	Job Title
Kai	ka	Senior
Kai	ka	Systems

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



5. Following verification, the User Information (Step 3) screen will appear (pictured on the next page of this guide). All items noted with an asterisk * are required. When complete, click SUBMIT.

NOTE: Submit the name *as it appears on the drivers license* to avoid issues with help desk identity verification.

New EpicCare Link User

Getting Started Prerequisite Check **3 User Information** 4 Identity Validation 5 Review & Submit

* First Name Middle I... * Last Name

* Identifier Type Driver's License * Driver's License State Pennsylvania * Driver's License Nu...

* Preferred Work Email Address... * Date Of B... mm/dd Personal Phon... Phone ...

We will be sending notifications to this alternate email address, so please ensure you provide an email address the new user checks regularly. Ideally, this should be associated with the new user's organization.

< Back Next > **Submit**

NOTE: If the following error message displays regarding the Personal Email Address entered, go to **Request > Application Access > App Request For Others** and search for that user because they likely already exist within IMS.

* Personal Email Address

This email address has been claimed by an existing E-Sign-On account.

- 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.

New EpicCare Link User

Getting Started Prerequisite Check User Information **4 Identity Validation** 5 Review & Submit

Confirmed the identity does not already exist

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.

7. The information you entered will be automatically displayed to Review & Submit (step 5). After confirming, click **Submit** to continue.

New EpicCare Link User

Getting Started Prerequisite Check User Information Identity Validation **Review & Submit** [HELP](#)

Review and Submit

Upon submission, you will be creating a new non-employee that will be configured to be an EpicCare Link user.

- First Name: A
- Last Name: H
- Middle Initial:
- Email: a
- Date of Birth: 2
- Phone Number: 4
- Identifier: 9
- Third-Party Organization: T
- Site Administrator: yes

[Back](#) [Next](#) **Submit**

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.

EpicCare Link [REMOVE](#)

* Job Category

Type to search by job category name.

* Will this person be scheduling surgical cases?

Select option

[<](#) [>](#) **SUBMIT**

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

- 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](#)

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

(continues)

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.

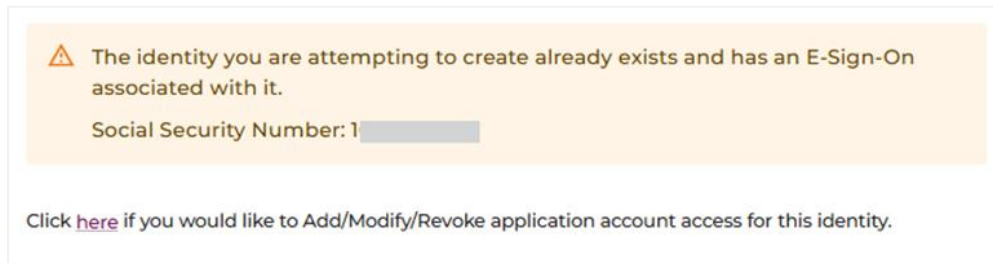
 The identity you are attempting to create already exists, but does not have an E-Sign-On associated with it.

Social Security Number: 7

Click [here](#) to create a new UPMC E-Sign-On for this identity.

(continues)

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.



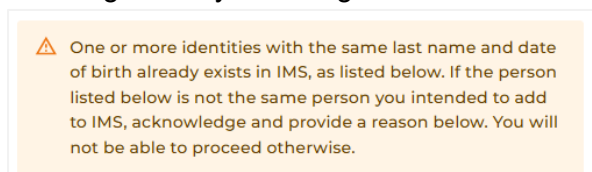
 The identity you are attempting to create already exists and has an E-Sign-On associated with it.

Social Security Number: 1 [redacted]

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 [redacted]

[redacted]

▼

Date of Birth: 19 [redacted]
Department: M [redacted]
Manager Email: c [redacted]
ESO ID: k [redacted]

ADD/MODIFY/REVOKE APPLICATION ACCOUNT ACCESS FOR THIS IDENTITY

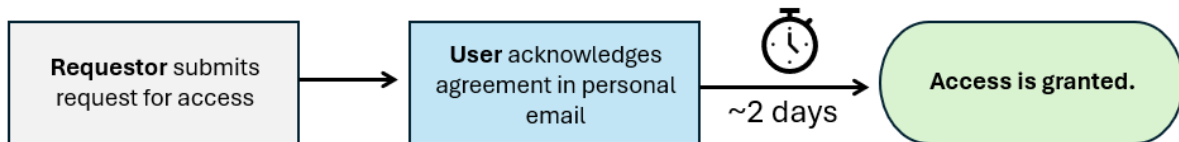
If you believe the user information you have provided does not match the user(s) above, please acknowledge by checking the box and providing a reason in the textbox below and then click the submit button.

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: 6/24/2026; Rev: 9.0

Audience: Site Admins for EpicCare Link Users

Intent: Instructions on how to add an existing non-employee account as an EpicCare Link User in IMS.