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Log In

1. Enter **epiclink.cchmc.org** in the address line of your internet browser.
2. Enter your **User ID** and **Password**
3. Click Log In.
4. If you use Epic at the hospital, you are considered a Hyperspace user and the department screen will default to **CCM Lab Processing**. **Do not** change the department.
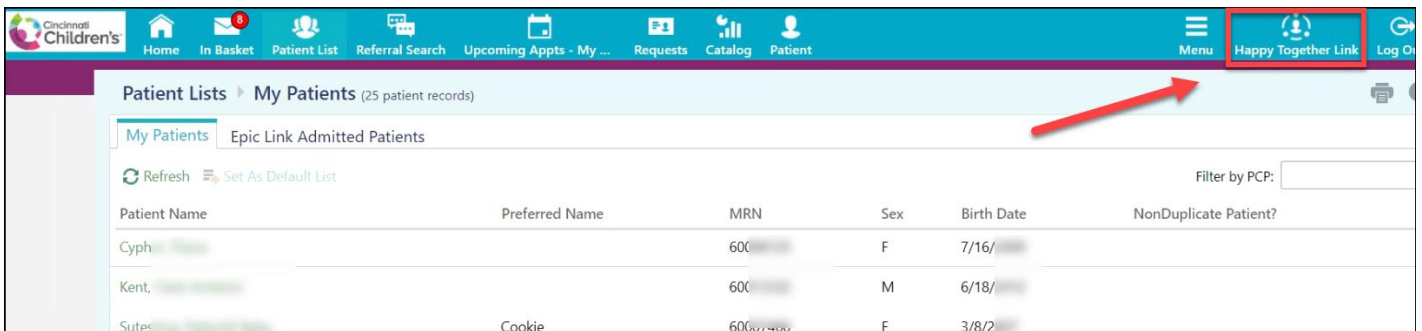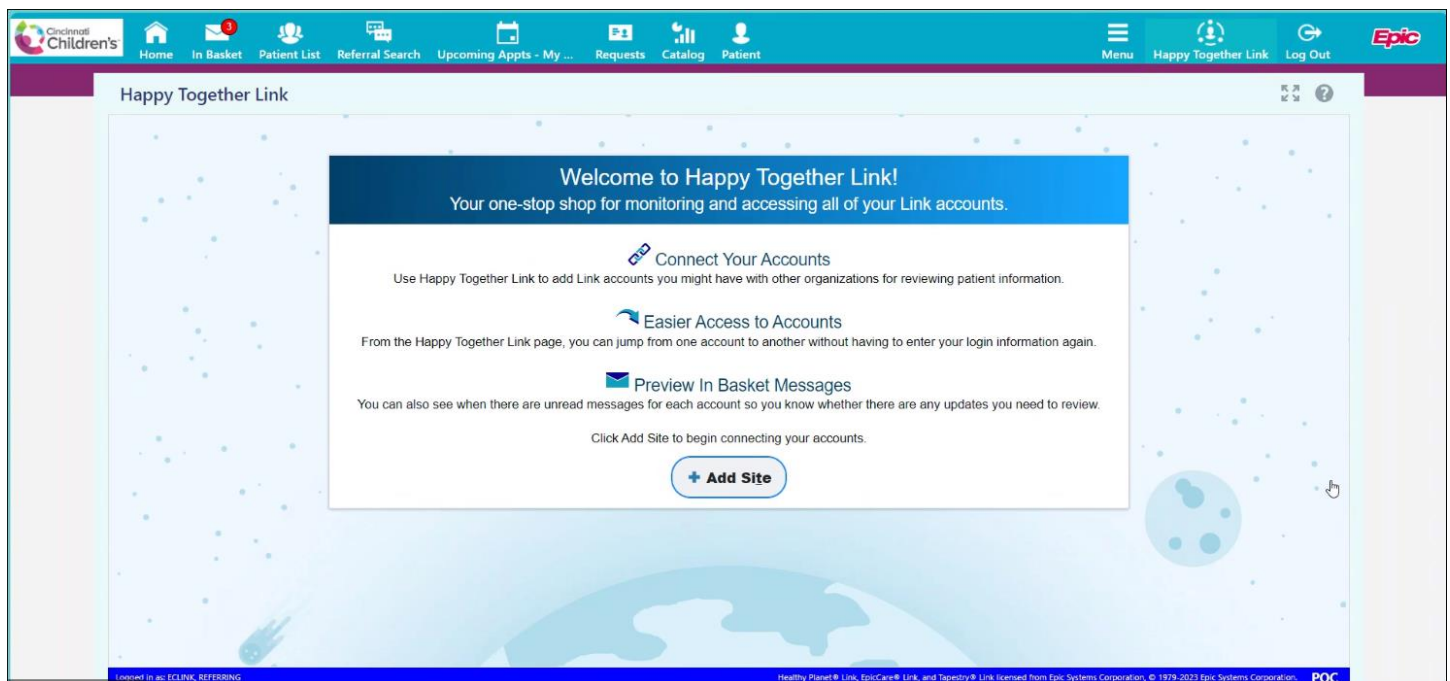
Happy Together Link
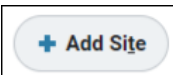
First time using HT

- To get started with the Happy Together Link, click the icon.

- When you open the activity for the first time, you see a **welcome message** with information about how to use Happy Together Link.

- To add a Link account to Happy Together Link, Click ![+ Add Site]

  - Community users can **search for the organization** name, website name, or postal code of the organization that hosts the website.
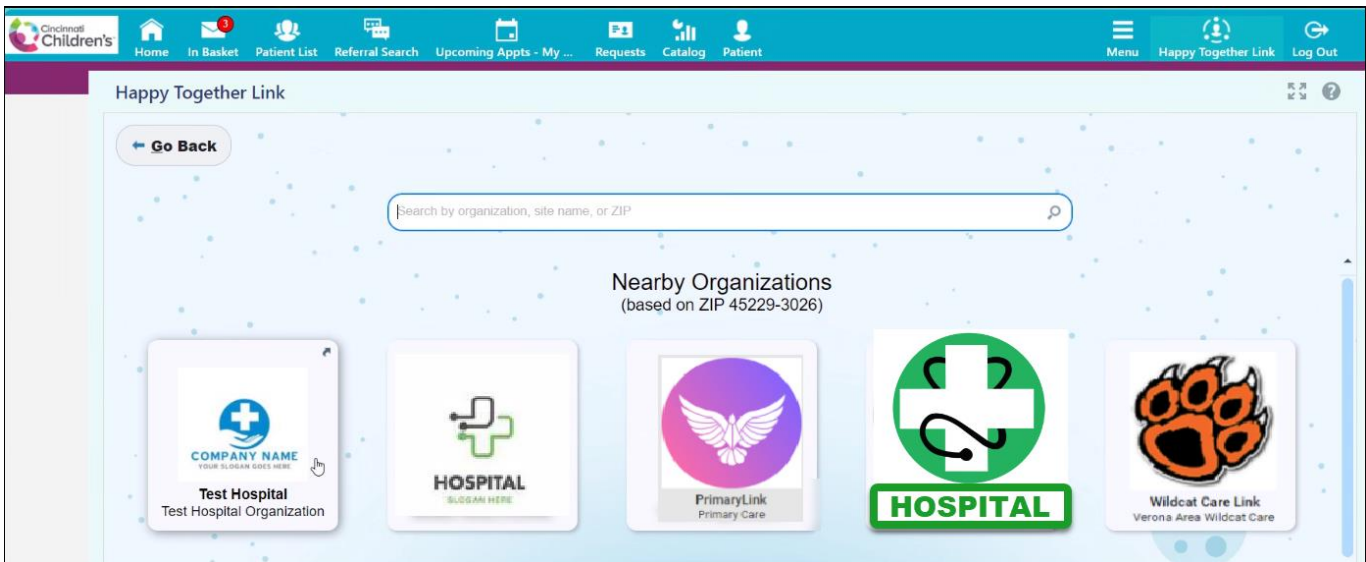
- From the search results, users **click the account to open a separate window** where they're prompted to enter their **account credentials** for that website & then their Passcode.
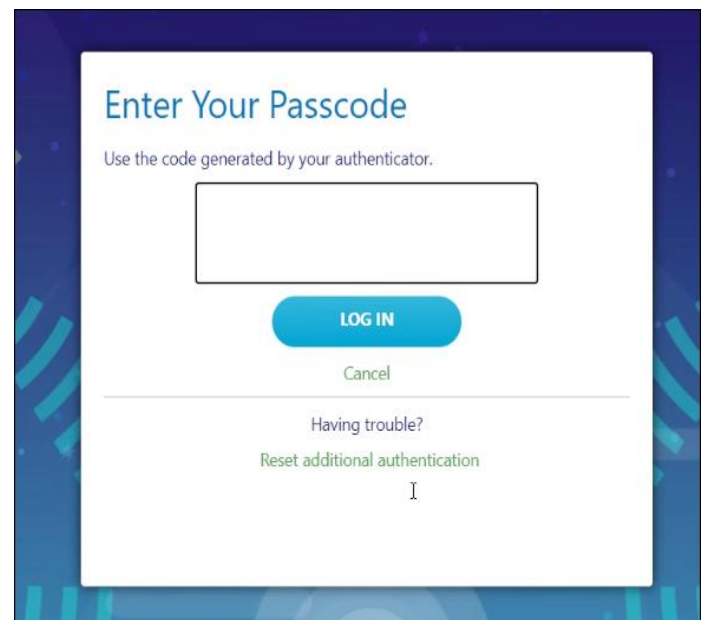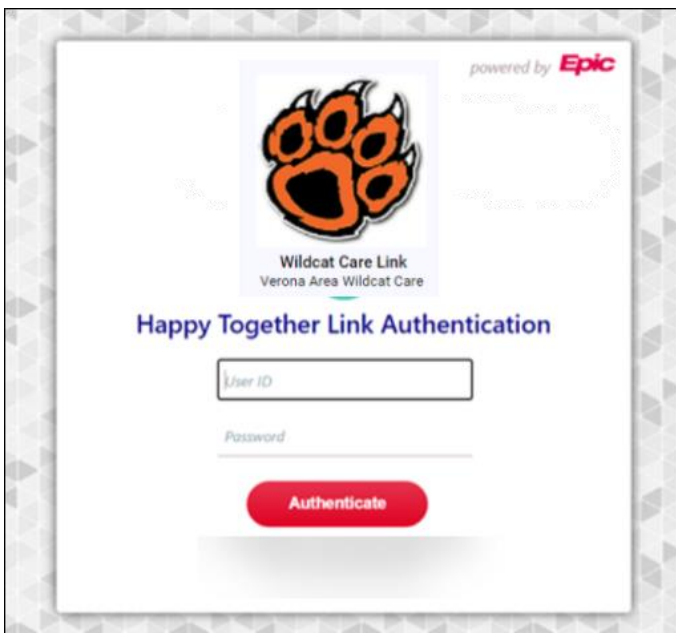
- After they log in to the website & verify their credentials, the account is added to the Happy Together Link activity.

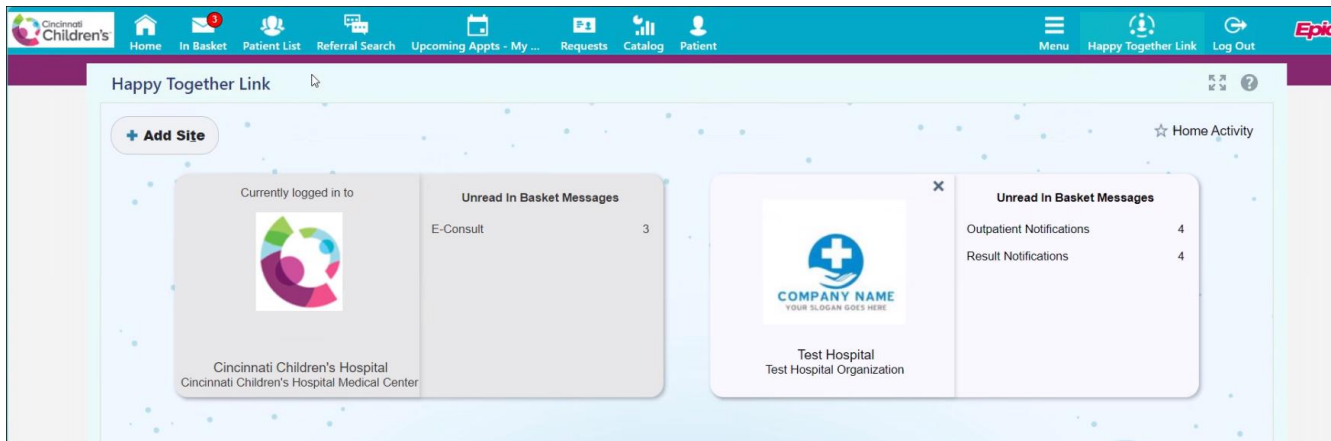- Users can then quickly access the account going forward from within any of their other accounts linked to Happy Together Link **without needing to enter their credentials again.**

- After adding a site, users can make Happy Together Link their default activity so the **activity appears right away the next time they log in**.

- To do so, a user clicks the start icon in the top right corner of the activity.
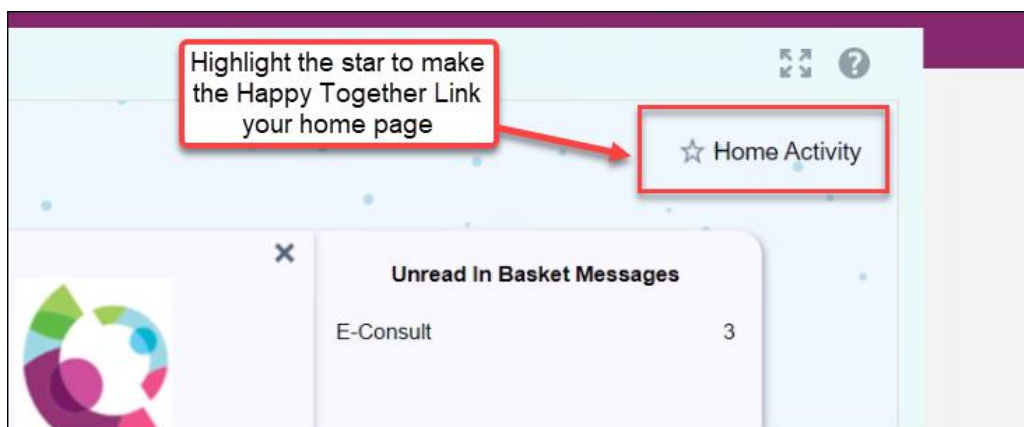
Patient Lists – Seeing Your Patients and the Patients for Your Practice

Viewing Admitted Patients

1. When you first log into Epic Link, click on the **Patients** button.
2. Click the **Epic Link Admitted Patients**. These are the patients who are currently admitted from your practice.
3. The list shows the unit name, the patient name, age/sex, bed, and room.
4. Reports show under the list of patients. Click on the report buttons to view your default reports.
5. Click the folder icon to open the patient's chart.

Viewing My Patients

1. Click on the **My Patients** tab next to the Epic Link Admitted Patients tab. This list displays all patients for your practice.
2. Next to the Filter by PCP: click the dropdown menu and select your name to see only your patients.
3. Click on the patient's name to open the chart. The chart will open to a SnapShot report on the Clinicals tab.

Clinical Tab – Reviewing the Patient's Chart

Patient Header

1. After opening the patient's cart, the patient header shows on the left-hand side of your screen. It displays the patient's age, sex, date of birth, MRN and PCP.
2. As long as you are the patient's PCP, your access to the patient's chart will never expire.
3. Click the **X** next to the patient's name to close the patient's record when you are finished reviewing it.

SnapShot

You can see an overview of the patient's current medical information from the SnapShot activity, which appears when you open a patient's cart. This includes medications, allergies, and the problem list. You have access to additional reports from the SnapShot activity.

1. Click the buttons on the report toolbar to quickly access common reports. These reports include: SnapShot, Patient Overview, Inpatient SnapShot, Facesheet and Longitudinal Plan of Care (LPOC).

Chart Review

To view information from Cincinnati Children's about past visits, progress notes, imaging, letters, and more, open the Chart Review activity.

1. Click **Chart Review** from the menu at the top.
2. Select a tab. For example, to view information about the patient's visits, select the **Encounters** tab.
3. Use the **arrows** to view additional Chart Review tabs.
4. To view more details, such as a specific patient visit, click the **date link** that appears in the row to open the report.
5. Click the **Column Headings** to sort ascending or descending. The arrow next to the column heading indicates how it is sorted.

Create a Filter

1. In Chart Review, select a tab. For example, the Notes tab.
2. Click ▼ Filters **.** The Filters page opens.
3. Select a filter type. For example, select Encounter Department.
4. Select check boxes next to the values that you want to see. For example, select CCM Cardiology.
5. Click **Apply**. The results of your search appear.
6. Click **Clear All** to remove filters.

Results Review

Results Review – Date Range Wizard

1. From within the patient's chart, click **Results Review**.
2. Select **Data from the last 6 Months** or the timeframe you deem appropriate from the Date Range Wizard.
3. Uncheck the **"Show this page before displaying Results Review"** which prevents the Date Range Wizard from appearing each time you view results.
4. Click **Accept** and the results will appear.

Reviewing Results

1. The results tree on the left organizes the results. All results will display for your selected timeframe.
2. Click on the heading in the results tree on the left to see its unique results.
   - Click on the plus signs to expand the data in the results tree. Click on the minus signs to collapse the results.
   - Hover over the numbered results to see the corresponding reference range or click on the **Show Ref Rng** button.
3. To print these results, select the results you want to print (you may use the CTRL key to select multiple results) and click the print icon in the upper right-hand corner of Results Review. The patient's first and last name should print in the header.
4. Click the ? icon to view additional help information for this page.

Allergies

1. Click **Allergies** from the toolbar.
2. Review the list of drug, product and food allergies for the patient. Documentation for allergies include the agent, reactions, severity, type and date noted.
3. For more information about an allergy, select the allergy and click **View History.**
   - **Note:** Environmental allergies are listed on the Problem List in the SnapShot.

Growth Charts

1. Click on **Growth Charts** from the toolbar.
2. Select which Growth Chart you want to view; the Weight chart is selected in this example.
3. A default **Reference dataset** will be selected. You can click the drop down to select a different dataset.
4. Hover your cursor over the **Patient data points** to view additional details.

Monitoring Your Patients – Event Monitor

Event monitor allows you to monitor events that occur in your patients' care, such as Inpatient admissions or discharges, completion of Outpatient visits, or new results. You can view these events on the Welcome page in the Event Dashboard or in your In Basket.

Target Your Event Notifications

To focus on the medical events that matter most to you, use event and relationship filters in Event Monitor. With these tools, you can tailor which types of events you're notified of.

1. To access the Event Settings page, click **Menu.**
2. Click **Settings**.
3. Click **Event Settings**.

4. Choose which types of events you'll receive notifications for by selecting the buttons in the Event Filter section, there are 14 options to select from.

5. Due to Cincinnati Children's configuration, we recommend keeping the Relationship Filtering on **All Events for patients in my group**.
6. Click **Accept**.

View a Patient's Recent Events

1. From the Home screen, the Event Monitor Dashboard appears on the left-hand side, showing your recent notifications that you have received.
2. You can hover over one of the notifications to see the names on the patients within that Event Monitor notification.
3. If necessary, you can view more information about the event by clicking the **name of the patient** in the Patient column. This will take you to In Basket where you can view additional information about the event and mark it as Done if you are finished reviewing it.

4. If you decide you would like to opt into additional notifications or opt out of notifications that are not useful to you, click the **wrench** icon to return to the **Event Settings** page.

In Basket: Viewing Messages

1. Click on the **In Basket** tab to access your messages.
2. Folders that group types of messages appear in the left pane. For example, you might see **ED Notifications** or **Inpatient Notifications** folders depending on the type of messages you opted into.
   - If you have new messages, the folder title will appear in bold, and the number of new messages appears in parentheses next to the folder name.
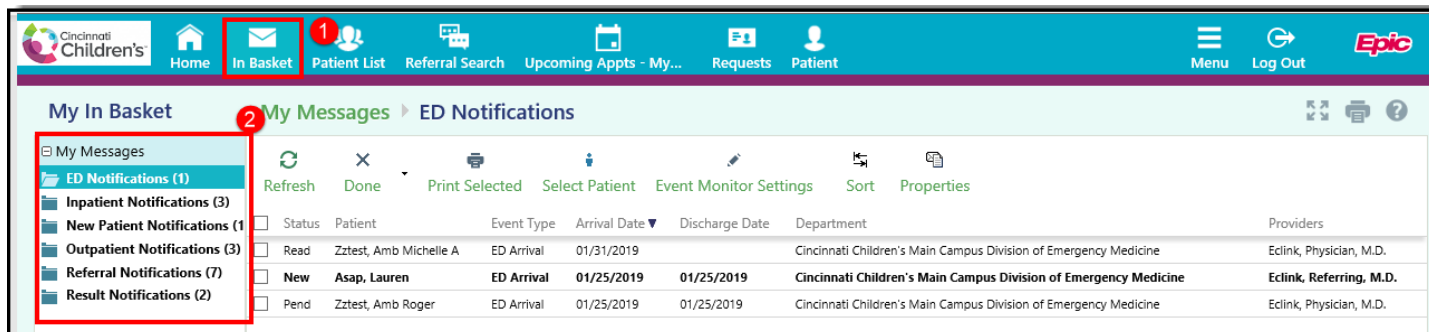
3. Select the folder for the type of message you want to view (for example, **Result Notifications**). The messages in that folder appear in a list to the right.
4. Select the message.
5. Read its contents in the bottom pane.
6. Click **Select Patient** to access the patient's chart.
7. You can mark the messages as **Done** after you have reviewed them. They will disappear automatically after 30 days.
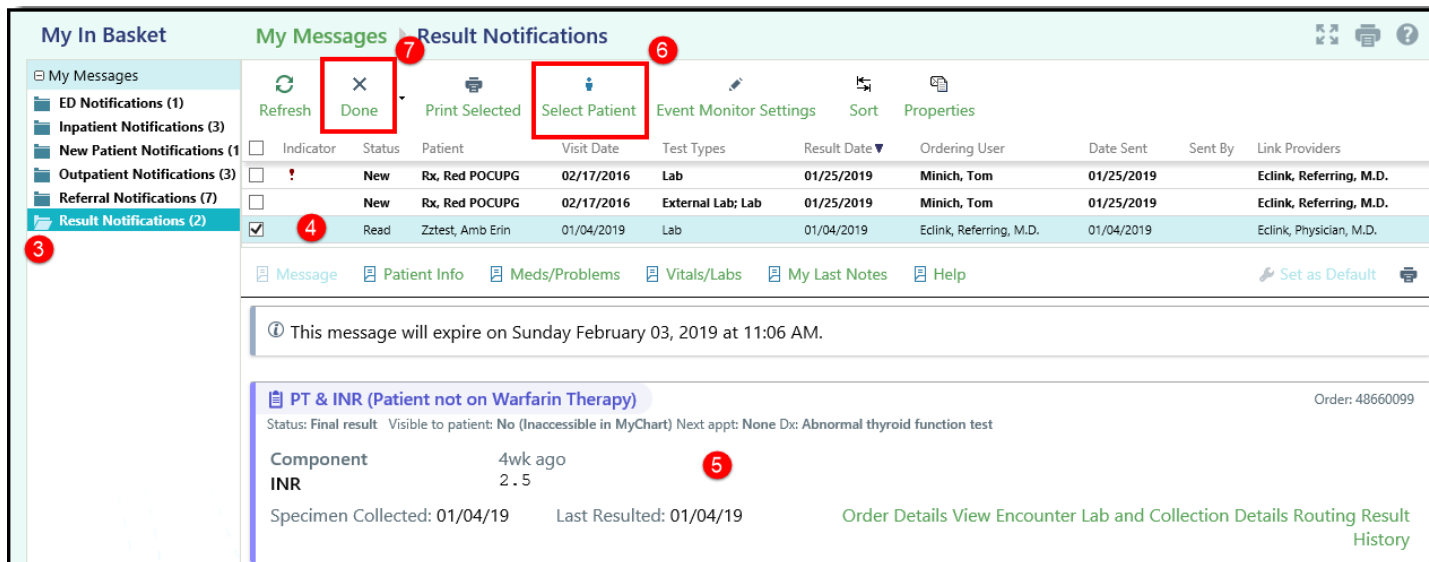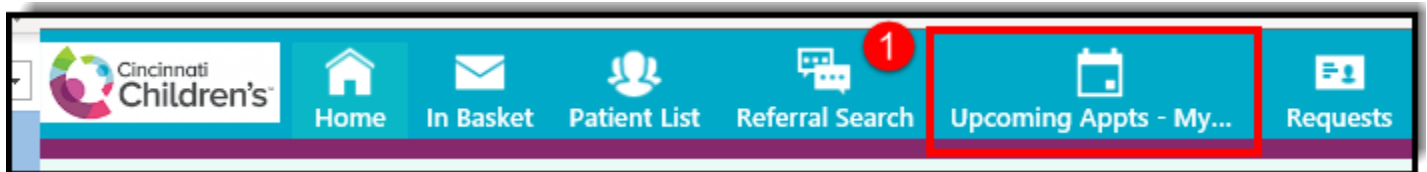
View Upcoming Appointments

In the Upcoming Appointments activities, you can view upcoming appointments for a specific patient or for all the patients you have access to.

The reports sort appointments by patients in a particular patient group, if applicable, and then by date and time. You can collapse or expand the sections by date to avoid printing or viewing the entire report.
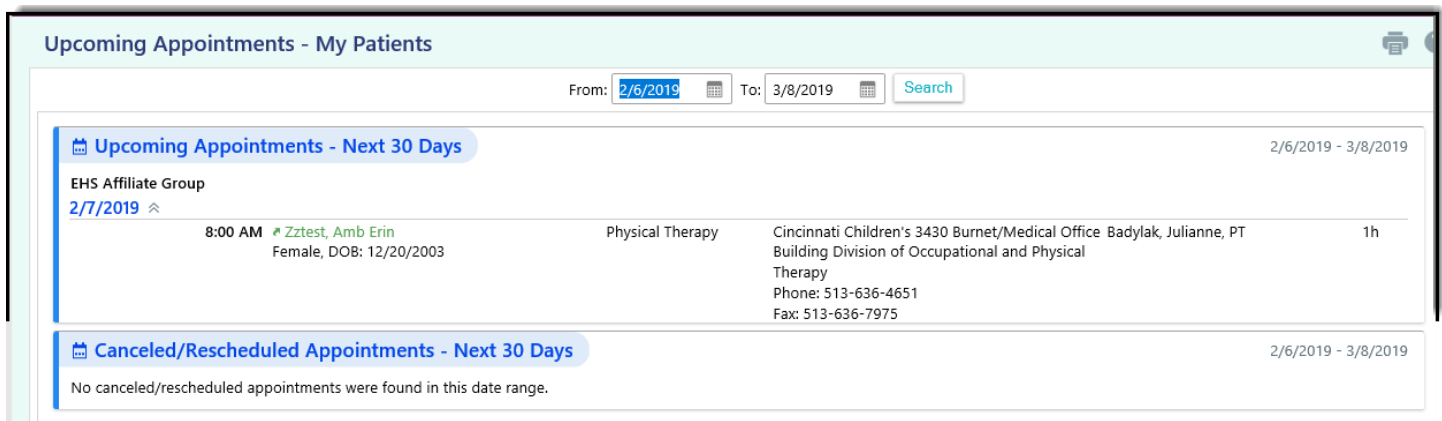
Canceled or rescheduled appointments appear at the bottom of the report with the time in strikethrough font.

View Upcoming Appointments for All your Patients

1. Click on the **Upcoming Appts – My Patients** button from the toolbar.
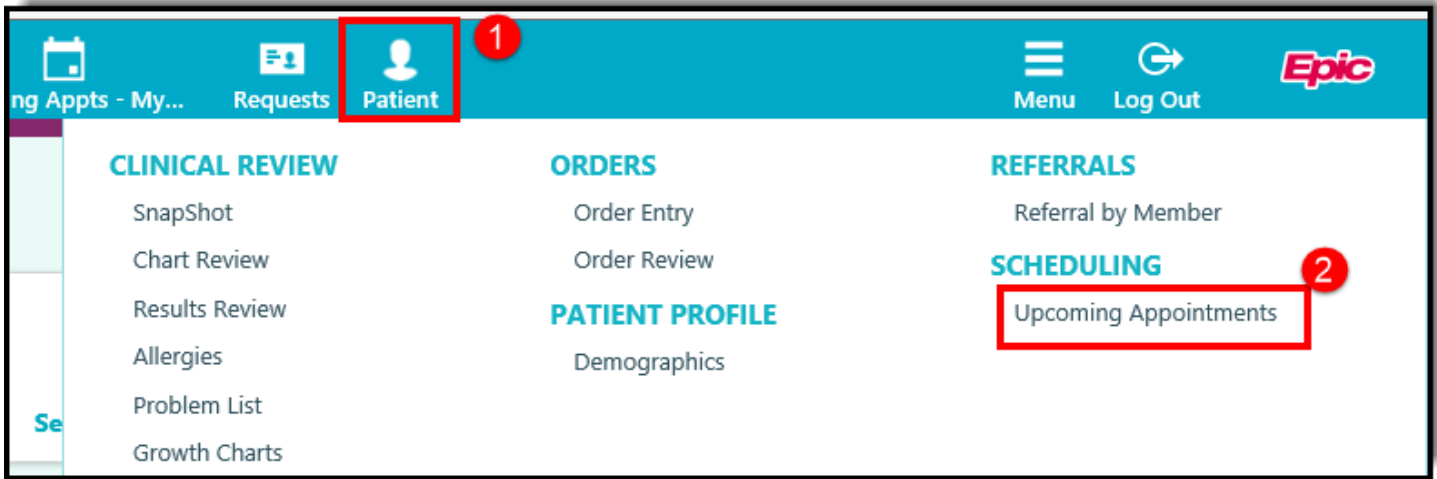

2. View your patient's upcoming appointments for the next 30 days and their canceled/rescheduled appointments for the next 30 days.
   - **Note:** If your patient list contains more than 2,500 patients, then you must go to the Upcoming Appts for a particular patient to see their appointments.

View Upcoming Appointments for One Patient
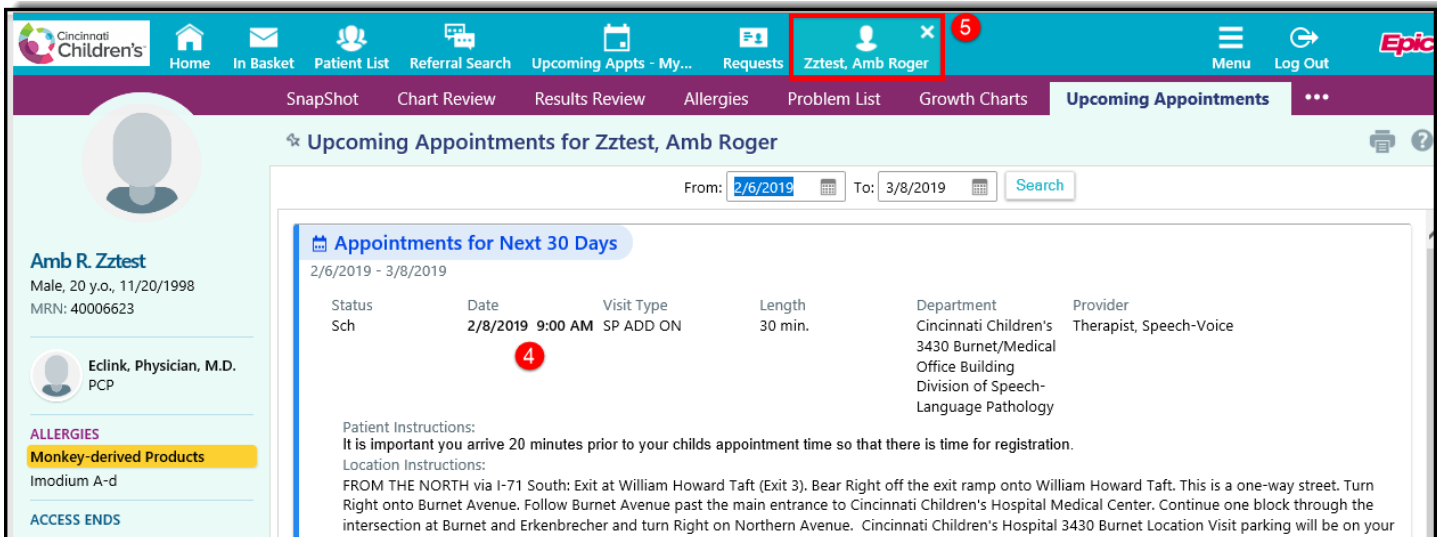
1. Hover over the **Patient** button on the toolbar.
2. Select **Upcoming Appointments**.

3. Select your patient from the list.

4. View the patient's appointments for the next 30 days.
   - Each upcoming appointment will contain instructions for the appointment and directions to the appointment.
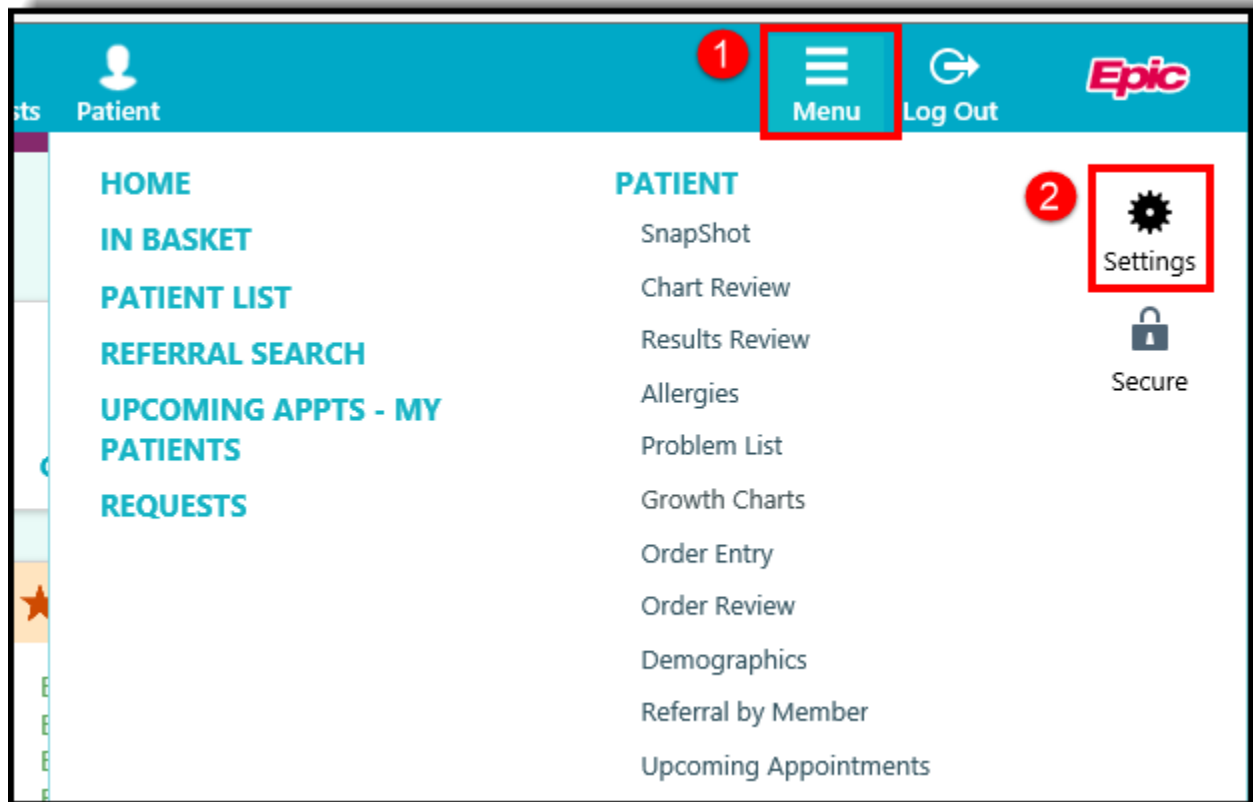5. Click the **X** to close out of the patient's record.

Using Program Utilities

Change Your Patient Selection Preferences

Use the Patient Selection Preferences to specify the patient selection method that you would to like to use by default.

1. Click on the **Menu** button in the top right-hand corner of your screen.
2. Click on the **Settings** option.

3. Click on the Patient Selection Preferences
4. For example, click on the Patient Search to make that your default screen, or click on Patient List to make your patient list your default screen.
   - **Note:** "Current Default" shows to indicate your current setting.
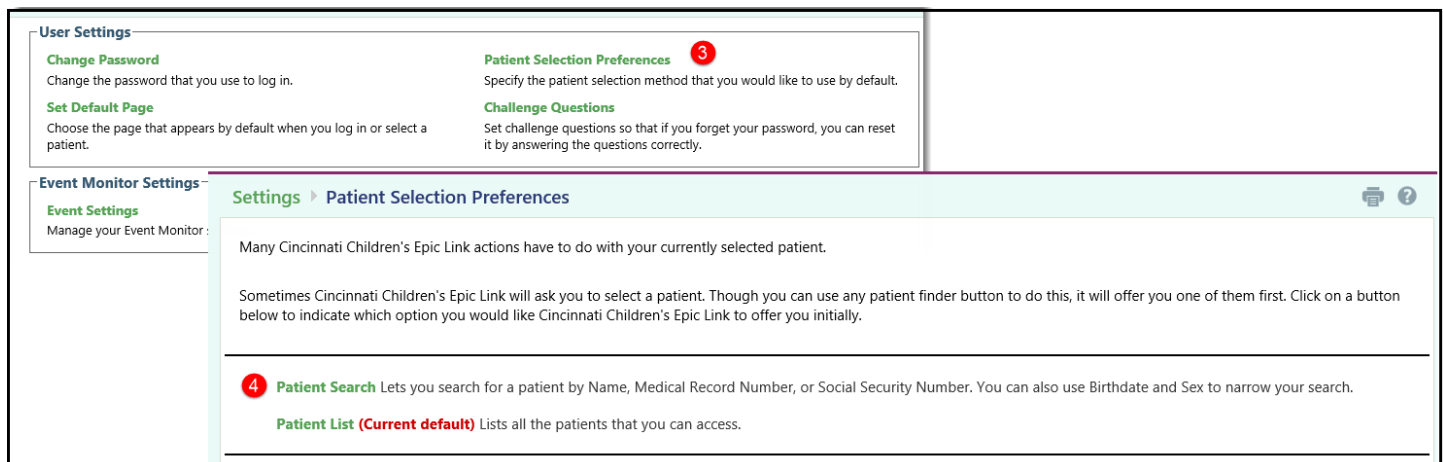
Change Your Default Start Page

Use the Set Default Page utility to determine which page you see first when you log into Epic Link. For example, if you prefer to review your In Basket message each time you log in, you can save time by setting your login page to In Basket.

1. From the Setting page, click on **Set Default Page.**
2. Navigate to the page that you want to set as your default page.
3. Click **Set Default Page** at the top of the application to set the current page as your default page.
   - **Note:** To reset your start page to the system default, go to the Set Default Page utility and click **Clear here to clear your default page and use the system settings instead.**