WVUMedicine

WVUChart Affiliate Link User Guide

Overview: PLEASE READ BEFORE MOVING FORWARD

Access to WVUChart allows providers to view up-to-date rest results, clinical notes, upcoming appointment information, and easily place referral and COVID-19 testing orders. Providers will need to complete a few steps prior to logging into WVUChart.

Providers will need to request access at www.wvuchart.com by selecting "Request New Account/Update Account Access". From here, providers will complete the application which is submitted to the WVU HIM Department. They will respond with a PRM questionnaire. Providers will need to complete the questionnaire fully an accurately to help determine the type of access need within WVUChart.

We are utilizing an application called Partner Risk Manager (PRM) to assist us with managing new and existing users. Users will receive email notifications from Partner Risk Manager after information provided in Step 1 has been entered into PRM. The email will have a sender name of WVUMedicine_PRM@iatricsys.com. The email will contain a link to access Partner Risk Manager. Please do not mistake this email for spam or disregard, as it will be important to follow and complete the steps provided within the email and application as soon as possible.

The next step is to download Imprivata and Citrix. Imprivata is WVU Medicine's dual authentication security software used when logging into any WVU Medicine application. It is a mobile app that can be downloaded to any smartphone from the App Store or Google Play. Citrix is a web application that is downloaded to your computer. It is used to access the WVUChart web app. Providers can use www.wvuchart.com to access the patient chart, but some portions of the chart may not function correctly.

Once the provider is enrolled in Imprivata and downloaded Citrix, they will be able to log into WVUChart freely.

The instruction below walk providers through enrolling in Imprivata, downloading Citrix and general use and navigation of WVUChart. It also contains contacts for support if there are any questions.

Table of Contents

Support Resources and Contacts

Resource	Number/E-mail	What is the Issue?
WVU Medicine IT Help Desk	304-598-HELP (4357)	• For Login Help on WVUChart • For Password Issues on WVUChart • For Citrix Issues • For Imprivata Issues (two-factor enrollment
WVUChart: Affiliate Link Support Team	AffiliateCommunication@wvumedicine.org	• If your access needs changed/corrected/updated • If you have not received credentials to login to WVUChart • For any other questions or concerns • if you need assistance completing a questionnaire in Partner Risk Manager (PRM) • If you need assistance uploading attachments in Partner Risk Manager (PRM) • If you need assistance resetting a password in Partner Risk Manager (PRM) • If you are an external provider and wanting access to WVUChart or to place referrals
WVUChart	www.wvuchart.com	• If you are requesting New Access • If you are requesting a Renewal in Access • If you need to Reactivate an existing account • If you need to Update Information
PRM Help Support	WVUM_PRM_HELP@wvumedicine.org	• If you have login or technical issues
WVU Medicine Training Material	www.wvumedicine.org	• If you need instructional documents for WVUChart or Partner Risk Manager

Epic Care Link (WVUChart) Tip Sheet:

Getting Started

EpicCare Link (WVUChart) is a tool that provides real-time web access to patient information so you can access patients' clinical data and communicate with WVU Medicine to provide quality patient care. You can also use EpicCare Link (WVUChart) to quickly refer patients to our organization.

EpicCare Link (WVUChart) is a collection of different web pages, or activities, that correspond to different tasks. The *activity* that you use depends on what you want to accomplish.

This guide takes you on an introductory tour of EpicCare Link. The first pages include information to help you get started, such as browser requirements and how to log in. The rest of the guide contains explanations of how to use EpicCare Link. Terms that appear in *italics* throughout the guide are further defined in the glossary at the end of the guide.

Help and contact information

For help using an activity, click on the webpage.

If you forget your password or can't log in, call 304-598-4357.

For all other issues, send an In Basket message to Customer Service.

Browser, system, and connection requirements

You must use one of the following Internet browsers to access EpicCare Link:

Apple Safari 6 and any later versions

Google Chrome

Microsoft Internet Explorer 9 through 11

Mozilla Firefox 24 and any later versions

On tablets, you must use iPad Safari or Android Chrome browsers.

EpicCare Link (WVUChart) requires a minimum screen resolution of 1024x768 pixels. We recommend that you use a high-speed Internet connection to achieve the best system speed and performance. In addition, you need Java enabled to display graphs and scanned images in EpicCare Link (WVUChart).

How do I log in?

1. Open your web browser and access the following URL: https://wvuchart.com. If you have trouble accessing the site, you will need to download citrix. See Citrix download guide at the beginning of the user guide.
2. Enter the user ID and password that you received with your access to EpicCare Link (WVUChart) and press Enter.
3. If a Terms and Conditions page appears, read the agreement and click **Accept** to acknowledge your agreement with the terms. You are now logged in to EpicCare Link (WVUChart).

How do I log out?

To maintain patient confidentiality, you need to log out or *secure* your screen when you are done working or have to leave the computer for any reason. There are two ways to do this:

Click ⟳ **Log Out** to log out of EpicCare Link (WVUChart). The next time you log in, you are directed to your start page.

Secure the computer by clicking 🔒 **Secure**. When you log back in, you return to the same activity that you were using before you secured the screen. This way, you don't need to navigate back to the page on which you were previously working.

Navigating in EpicCare Link: The Basics

When you log in to EpicCare Link, two sets of navigation tools appear at the top of the page.

Action Options: Use these buttons, located on the top right of the screen, to perform basic tasks, such as selecting a patient or logging out.

Navigation Tabs: Use these tabs to open different activities in EpicCare Link.

Most activities are located on the **Clinicals** tab. When you select Clinicals, a menu appears on the left side of the screen. Open activities from this menu by following these steps:

1. Click a menu name, such as **Clinical Review**, if it's not already expanded. The menu expands and activity options appear below.
2. Click the name of an activity option, such as **Chart Review**, to open the activity.

Below is a map of the main areas on the screen, with the **Clinicals** tab selected and the Chart Review activity open.

Set up your email preferences

To assure you are notified of any events involving your patients

1. Select the **Menu** ![Menu] icon in the top right corner of the page.
2. Click ![Settings icon] **Settings** and then click **User Demographics**.
3. In the User Information section, enter your email address.
4. In the **Days between e-mails** field, enter the number of days you want to wait between notification emails.
5. In the **Notifications Preferences** field:

Select the ![Receive email notifications] tab to receive email notifications. Then select the ![Receive notifications for group events] tab to receive notifications about all patient events for the provider groups you belong to.

6. Click accept.

Accessing the Patient Chart

There are two ways to access a patient's chart: by selecting the patient from a list of your current patients or by searching the Patient Database for your patient based on name, date of birth, or other criteria. Both methods are described below.

Select your patient's chart from a list of current patients

If you have access to only a few patients, quickly select your patient from a list instead of searching for him. You can access your patient list from the Pt Lists activity or the Patient Search activity.

1. Select the **Pt Lists** tab. Use the tabs at the top of the activity to select the patient list you want to view.

   If you have access to many patients, your patients might appear on more than one page. Use the alphabetical search index at the top of the page to find patients by clicking the first letter of the patient's last name.

2. Click a patient's name to open their chart.

3. To view a list of currently admitted patients, go to **Pt Lists** and select the tab for admitted patients. For patients to appear on this list, you must have a provider relationship of PCP, attending, admitting, or treatment team on the admission.

4. Select a patient's name to view additional patient-specific information in the report pane at the bottom of the page.

5. If you view a report frequently, click [wrench icon] to add a button for the report to the toolbar. From that page, you can also remove your report toolbar buttons, rearrange the order of buttons, and rename the reports

6. Click [folder icon] to open a patient's chart.
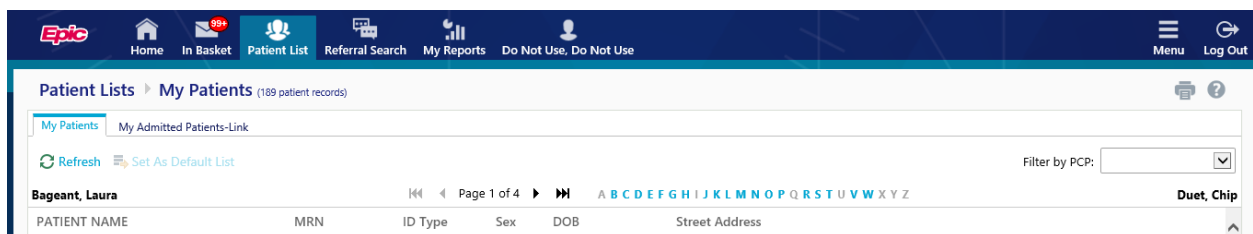
To see only the patients for whom you are the PCP, select your name in the **Filter by PCP** field.

Search for a patient's record based on name or MRN

If you know specific information about a patient, such as his name, you can use the Patient Search activity to enter that information and then select the appropriate patient from the list of possible matches.

1. Click [person icon] **Patient**. The Patient Search activity opens.
2. Enter the patient's MRN.
3. Press Enter or select the patient's name from the drop-down list of potential patient matches.
4. In the Search Results window, click the name of the patient whose chart you want to open.

> In two clicks, you can quickly open a patient chart that you recently had open. In the **Search My Patients** section of the Patient Search activity, select the **Recent** tab and then click the name of the patient.

What If I Can't Find My Patient?

If you don't find a patient using the methods above, you might not have been granted access to her chart yet, or she might not have a record in the system. Use the *Search All Patients* section of the Patient Search activity when you need to gain immediate access to a patient's chart for the first time, such as in the case of an emergency. Note that you must enter the patient's first and last name when using this method.

1. If your initial search returns no results, click **Search All Patients** from the Search Results window.
2. Complete all of the *required fields*, and then click 🔍 **Search**.
3. Select the patient record you want to open and select the reason you need access to the patient's chart in the **Reason** field and add any comments. Enter any additional comments and click accept.

Reviewing the Patient Chart

Review the patient's chart before a visit

1. Open the patient's chart and click **Chart Review**.
2. Select a tab. For example, to view information about the patient's visits, select the *Encounters* tab.
3. To view more detail, such as a specific patient visit, click the date *link* that appears in the row. The report opens.

> To view details on several rows at once, click the check boxes in those rows and then click ⊞ **Start Review**.

4. To send a message to the patient's PCP regarding an office visit, click the **Ask a Question** link at the top of the report.

Chart Review: Quick Hints

For patients with large charts, it can be helpful to narrow down the list of visits, labs, medications, or other information in Chart Review. For example, on the **Encounters** tab, you can filter the list so you see only the visits associated with certain providers.

1. In Chart Review, select a tab.
2. Click ⊞ **Filters**. The Filters page opens.
3. Select a filter type and then select check boxes next to the values that you want to see. For example, select Encounter Type and then select the Billing Encounter filter.
4. Click apply. The results of your search appear.

4. Click ⊠ **Line Graph**or ⊞

	Department Specialty ▲	#Enc	Last Date
☐	<Unknown>	1	03/25/2018
☑	Cardiology	14	12/16/2019
☑	Family Medicine	2	09/20/2018
☐	Gastroenterology	1	12/21/2017
☐	Pediatrics	1	12/08/2018

Filters
- Attachment Type
- Chief Complaint
- Department Specialty
- Dx/Impressions
- Encounter Class
- Encounter Department
- Encounter Type
- Episode Linked Problem
- Episode
- Medication
- Primary Dx
- Provider
- Order
- Admissions/Outpatient
- Provider or Note Action
- Organization

SnapShot | Chart Review | Care Everywhere | Results Review | Flowsheets | Allergies | Problem List | Histories | Face Sheet | •••

Chart Review - Encounters ▸ Filters

Clear All

ⓘ To remove the search criteria and begin a new search, click 🗐 **Clear All**.

View data in graph or table format

Use flowsheets in Chart Review to see how patient data such as vital signs or lab values have changed over time.

1. In Chart Review, select the data you want to view. For example, select specific visits or lab tests.
2. Select the type of flowsheet that you want to create.
   Click ⊞ **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.
   Click ⊞ **Lab Flowsheets** to graph lab result data.

3. Click and drag to select the table cells that contain data that you want to graph. **Bar Graph** to create a graph of the selected data.

4. Click Line Graphor
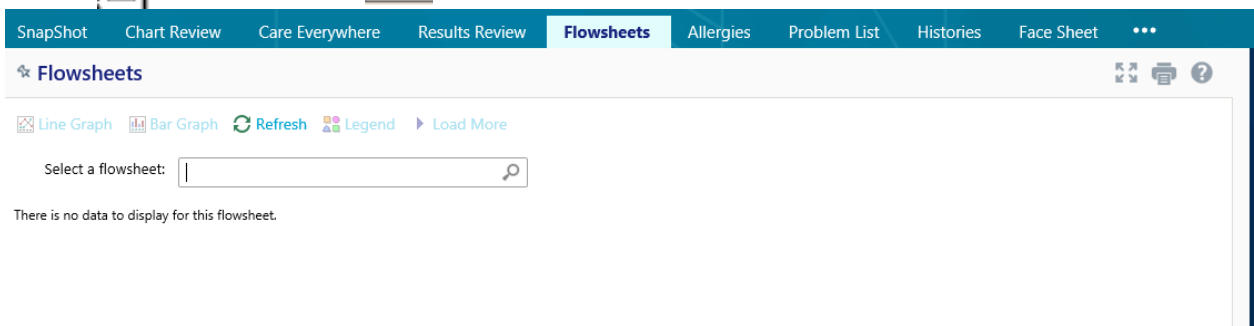
View a patient's lab results

In addition to lab flowsheets in Chart Review, you can view patient lab results over time in Results Review.

1. Select the **Clinicals** tab and click **Clinical Review > Results Review**. The Date Range Wizard appears.
2. Select the date range for the results data you want to see and click ✔**Accept**. The patient's results appear.
3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left side of the page. Select the name of the component or component type that you want to view. Only those results appear in the table.
4. To view more columns of results, click ◀**Load More**. To view all columns of a patient's results for the time range that you selected, click load all.
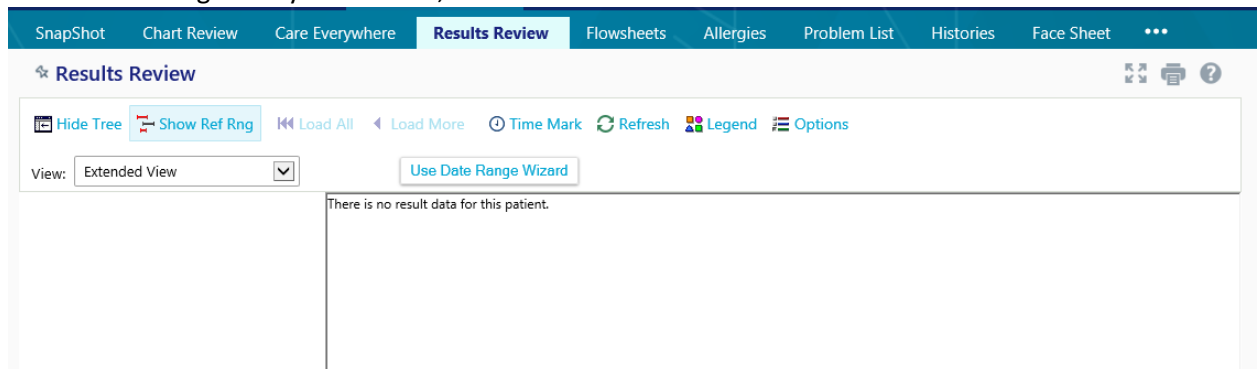
> *Time mark* results so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen. Click 🌐 **Time Mark** to do so.

Customize the way results appear

1. In Results Review, click ☰ **Options**.
2. To make the most recent results appear from left to right by default, select the **Trend Dates in reverse chronological order** check box.
3. Set your other default preferences, such as the default number of columns to show, using the other options.
4. Click accept

Results Review Options

Reset to Defaults

Default number of columns for Extended View: 5 ☑
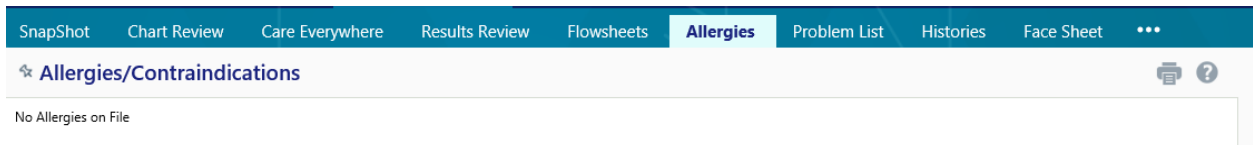
Number of columns per row when printing: 5 ☑

☐ Trend Dates in reverse chronological order
☑ Show time in Extended View
☑ Show date range wizard before starting Results Review
☐ Start with date range filter enabled
☑ Show grid lines

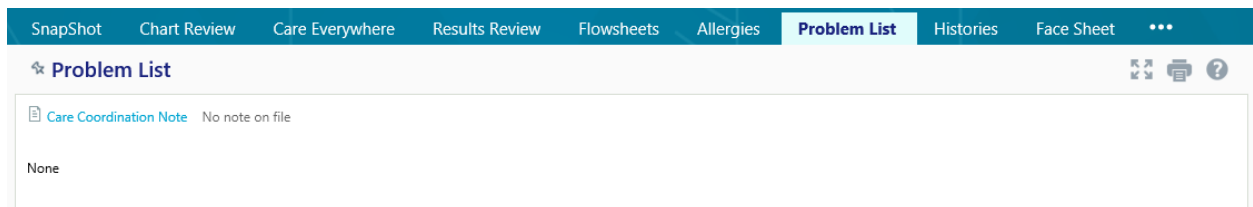✔ Accept   ✘ Cancel

View a patient's allergies

Select the **Clinicals** tab and click **Clinical Review > Allergies**.

| SnapShot | Chart Review | Care Everywhere | Results Review | Flowsheets | **Allergies** | Problem List | Histories | Face Sheet | ••• |

⚶ **Allergies/Contraindications**   🖨 ❓

No Allergies on File

ⓘ   For more information about an allergy, select the allergy and click 🗔 **View History**.

View a list of the patient's current medical problems

Select the **Clinicals** tab and click **Clinical Review > Problem List.**

| SnapShot | Chart Review | Care Everywhere | Results Review | Flowsheets | Allergies | **Problem List** | Histories | Face Sheet | ••• |

⚶ **Problem List**   ⤢ 🖨 ❓

📄 Care Coordination Note   No note on file

None

ⓘ   For more information about a problem, click the **View Report** link.

View a patient's current medications

Select the **Clinicals** tab and click **Clinical Review > Medications**.

View a patient's history

Select the **Clinicals** tab and click **Clinical Review > Histories**. A report appears with information about the patient's medical, surgical, family, and social history. Social history includes topics like tobacco use and sexual activity.

> **ℹ** For a high-level summary of the current patient's chart, select **SnapShot** from the Clinical Review menu.
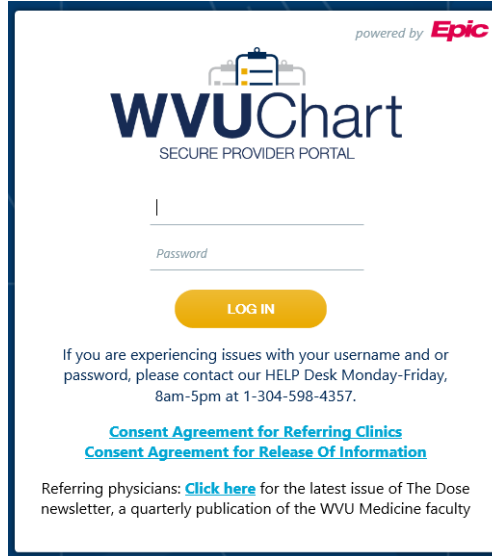
View a patient's demographics

Select the **Clinicals** tab and click **Patient Profile > Demographics**. A report appears with demographic information like the patient's address, PCP, emergency contacts, and more.

EpicCare Affiliate Link Placing a Referral Order

Providers and staff that use http://www.wvuchart.com can now place Referral orders electronically. Providers can refer patients for a specialty care visit, provider insurance information, and referral authorization using this application. Below are the steps you will need to follow to complete a referral order.

1. Log into WVUChart at https://wvuchart.com/epicweb/common/epic_login.asp. Some users may have a shortcut saved or are accessing the app through Citrix.
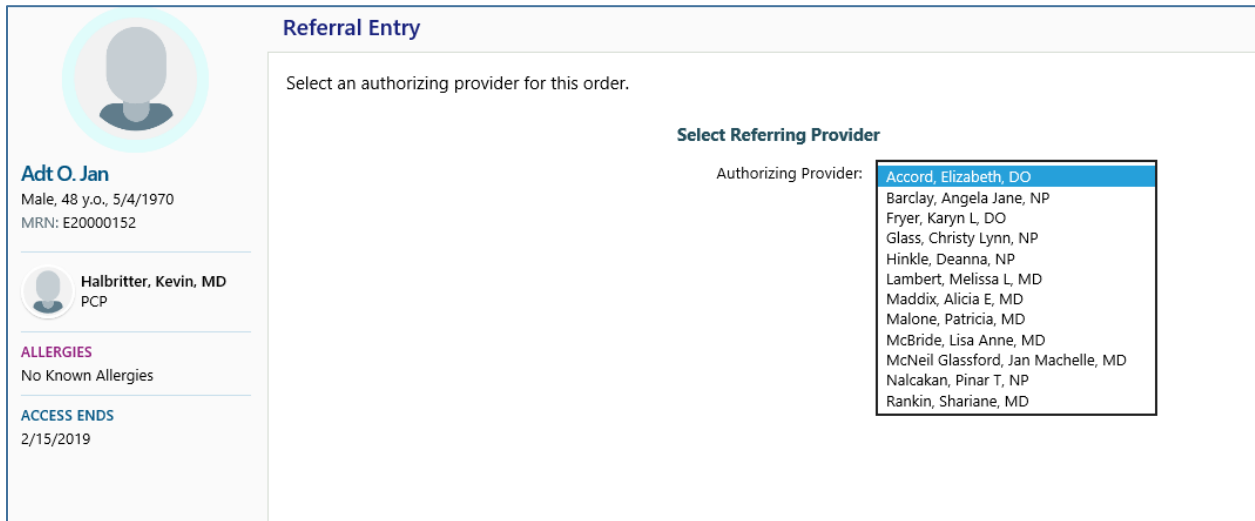

2. From the HOME screen click on the **PLACE AN ORDER** icon.
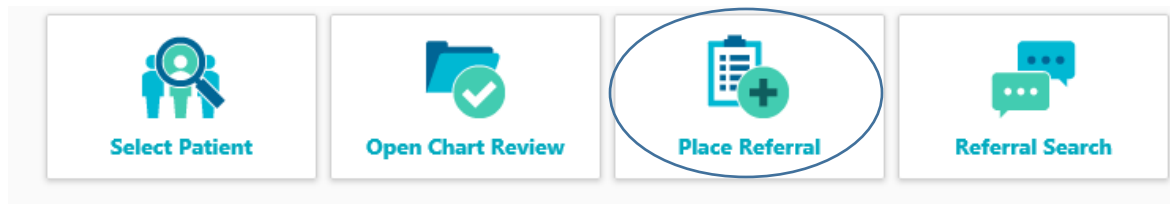
3. From the Patient Search Screen you may Look up an existing patient or create a new. The List of MY PATIENTS will appear if they have been linked to your clinic. If the patient is not on your list, you may search ALL patients by clicking the link under your list. This will search through all patients that exist in Epic. You should never create new patient unless you have searched ALL Epic for your patient. If you are confident they are not in Epic please create a new chart.

You should *only* use this if you cannot find the patient in both searches.

4. Once the patient has been identified, the Ordering Clinic and Authorizing Provider items will default to the associated clinic. If you have more than one clinic, please click the clinic you are placing the order from and the provider that is requesting the order.

Referral Entry

Select an authorizing provider for this order.

Select Referring Provider

Authorizing Provider:
- Accord, Elizabeth, DO
- Barclay, Angela Jane, NP
- Fryer, Karyn L, DO
- Glass, Christy Lynn, NP
- Hinkle, Deanna, NP
- Lambert, Melissa L, MD
- Maddix, Alicia E, MD
- Malone, Patricia, MD
- McBride, Lisa Anne, MD
- McNeil Glassford, Jan Machelle, MD
- Nalcakan, Pinar T, NP
- Rankin, Shariane, MD

Adt O. Jan
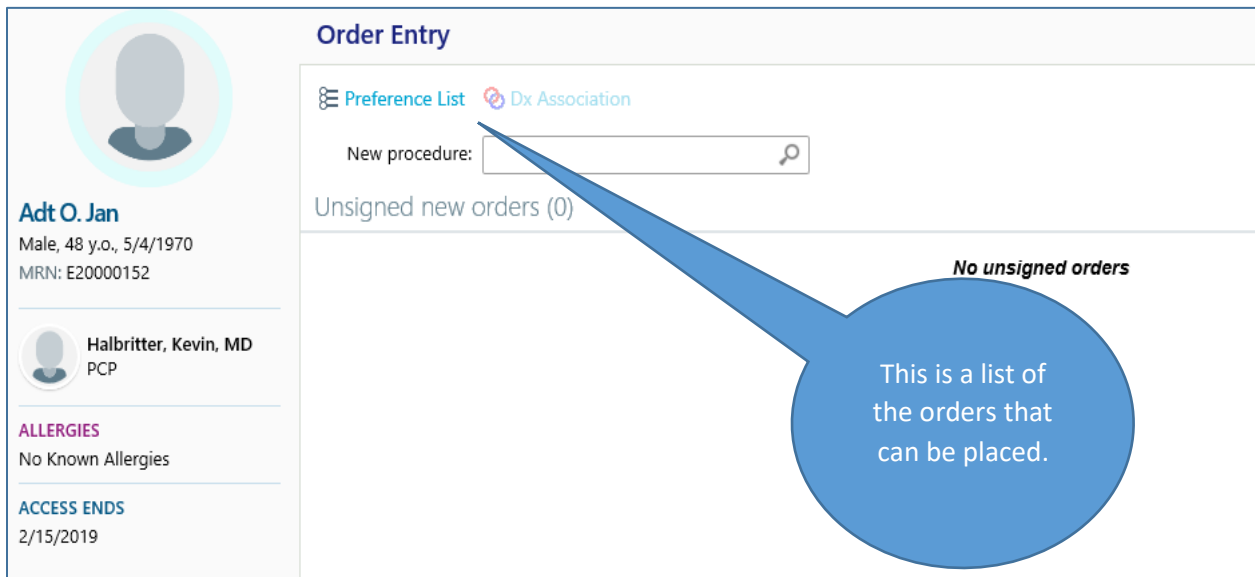Male, 48 y.o., 5/4/1970
MRN: E20000152

Halbritter, Kevin, MD
PCP

ALLERGIES
No Known Allergies

ACCESS ENDS
2/15/2019

5. You may place the order by one of two ways.

6. From the **Preference List**

Order Entry

Preference List Dx Association

New procedure: _____ 🔍

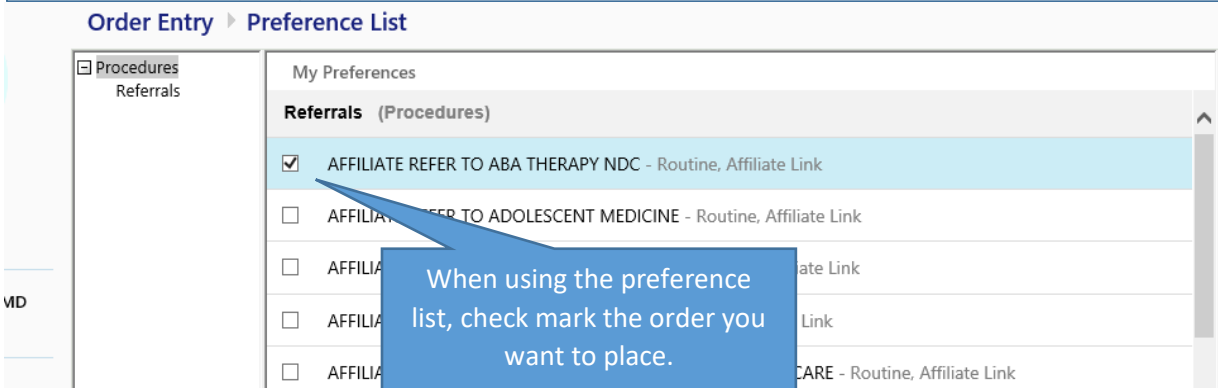Unsigned new orders (0)

No unsigned orders

This is a list of the orders that can be placed.

Adt O. Jan
Male, 48 y.o., 5/4/1970
MRN: E20000152

Halbritter, Kevin, MD
PCP

ALLERGIES
No Known Allergies

ACCESS ENDS
2/15/2019

Order Entry ▸ Preference List

☐ Procedures
   Referrals

My Preferences

Referrals (Procedures)

☑ AFFILIATE REFER TO ABA THERAPY NDC - Routine, Affiliate Link

☐ AFFILIA...ER TO ADOLESCENT MEDICINE - Routine, Affiliate Link

☐ AFFILIA...ate Link

☐ AFFILIA...Link

☐ AFFILIA...CARE - Routine, Affiliate Link

When using the preference list, check mark the order you want to place.

7. From the **New Procedure field**.

Order Entry

Preference List   Dx Association

New procedure: [   ] 🔍

Unsigned new orders (0)

...ned orders

> Click on the magnifying glass to see a complete list of orders to select from.

REF55AL	AFFILIATE REFER TO ABA THERAPY NDC
REF3AL	AFFILIATE REFER TO ADOLESCENT I
2100401AL	AFFILIATE REFER TO ADULT CYSTIC FIBROSIS

> Click on the BLUE hyperlink to select the order

***Both options will show the same orders.**

8. Once you have chosen the order you want to place, you may click on the order name (blue hyperlink), or on the pencil icon on far right. Click either to edit the referral order.

Future

❗ AFFILIATE REFER TO ABA THERAPY NDC   ✏️ 🗑️

Future

9. You will need to enter the *reason for referral* and the **referral location** (both are required). Next, choose the location to refer your patient. Click the drop down and choose the location you would like your patient to be seen. Comments are optional. You will see multiple locations here this service is available. This will allow you and your patients to decide on the most convenient option. You will also see instructions on what items may need to be attached when the order is placed.

AFFILIATE REFER TO CARDIOLOGY

Questions:		**Answer**	**Comment**
1. Reason for Referral: (Please provide the reason for referral)	❗		
2. Referral location (At which location would you like the patient to be seen?)	❗	▼	
3. Please attach: Last Office Note & Copy of Insurance Card (Please go to the "referral by patient" tab on the left and find your referral and click on "add note/attachment" tab at the top of the page.)			

▼	
Morgantown	⌃
Elkins	
Keyser	⌄
Connellsville, PA	
⟨ ⟩	

Attach files:

Add files

10.0 MB Total Allowed

Click the Accept button

✔ Accept   ✕ Cancel

10. Click the **Accept Orders** tab once all orders have been placed and files are attached.

Unsigned new orders (1)

AFFILIATE REFER TO ADOLESCENT MEDICINE   ✎ 🗑

Future

✔ Accept Orders

11. Once the order is received and the appointment is scheduled, the provider will be notified by an In-basket Message.

You will also get an email notification to the email you have set up which will look like this:

From: WVUChart@wvumedicine.org [mailto:WVUChart@wvumedicine.org]
Sent: Monday, July 03, 2017 11:12 AM
To:
Subject: You Have an Event for a Patient!

Please log in to WVUChart.com to view Patient Information.

12. In order to get these email notifications:
    Click Admin (in the top right hand corner of the webpage) then select "user demographics," enter your information as directed and select "SAVE". This will ensure you are notified anytime your patient is scheduled for the referral appointment.


Troubleshooting
1. Why is my Clinic missing? You need to have your clinic added to your Epic EMP record.
    a. Call the HELP desk place a ticket stating - I am missing my clinic. I need my clinic listed on my Epic EMP record. The name of my clinic is *insert name of clinic*
2. Why can I not view the list of consulting providers?
    a. Call the HELP desk place a ticket stating - I am missing my list of providers. I need my providers added to my Epic EMP record.
    b. Also, provide a list of specific providers.
3. Why can I not assign a referral?
    a. Call the HELP desk and place a ticket stating – I am unable to assign a referral.

HELP DESK (304) 598-4357

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In Basket: Viewing Messages

As you interact with other clinicians and staff members, it is important to have a streamlined system of communication. In Basket is a quick and easy way to communicate with your colleagues. From here, you can view and sort messages, search for messages based on a number of criteria, and respond to your messages.

Select the **In Basket** tab to access your messages. If you have new messages, the folder title appears in bold, and the number of new messages appears in parentheses next to the folder name. If you have a new high priority message, the folder appears with a red arrow.
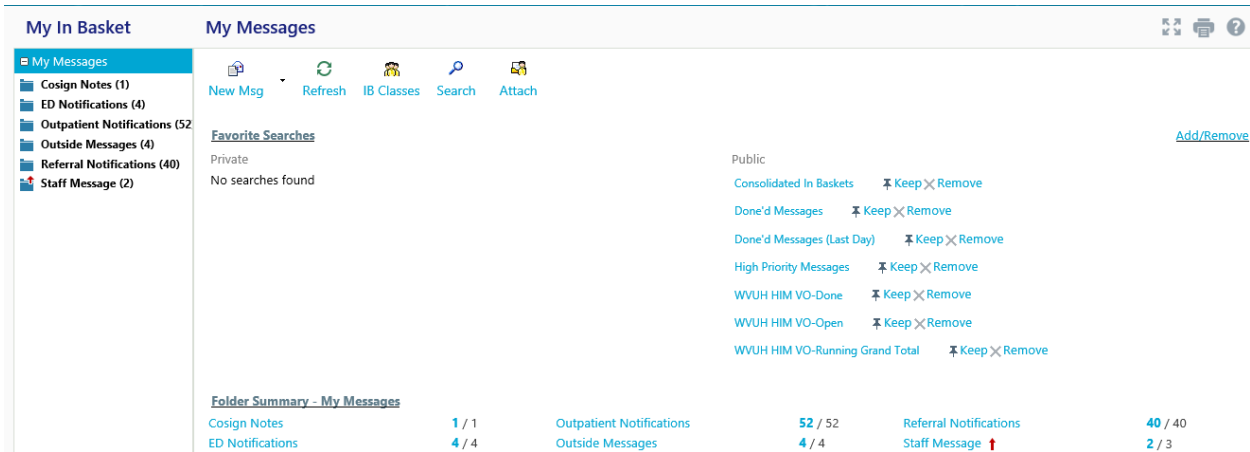
View a message

1. 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 in to the right.
2. Select a message to read its contents in the bottom pane.

Search for a message

1. Click 🔍 **Search** in the toolbar.
2. Enter as many search criteria as you want. You can search by patient, message type, status, recipient, priority, date, or any combination of these.
3. Click ✅ **Search**. Your search results appear.
4. To return to your normal In Basket view, click **My In Basket** at the bottom of the left pane.

Print multiple messages at once

If you are working with a paper system, it can be useful to print multiple In Basket messages that you can then keep on file. Note that you can print multiple messages at once only for certain message types.

1. Select the folder containing the messages that you want to print.
2. Select the check boxes next to the messages that you want to print.
3. Click 🖨 **Print Selected** on the toolbar.
4. Select the appropriate print settings and print the messages.

In Basket: Sending Messages

In Basket is a communication hub where you can send and receive secure messages similar to email. Messages are sent to individual recipients or to a number of recipients grouped in a class or a pool. You can also associate a patient with the message using the **Patient** field on the message form so that the recipient can refer to the patient's chart.

Send an In Basket message

1. Select the **In Basket** tab.
2. Click the arrow next to ▦ **New Msg** and select the type of message you want to send.
3. In the **To** field, *completion match* on the name of the person or group to whom you would like to send your message. To see a list of all possible recipients, click 🔍.
4. Enter a brief subject in the **Subject** or **Summary** field.
5. If you are sending a message regarding a patient, either click **Use <patient name>** to pull in the patient's name, or search for a different patient. This attaches the patient's name to the message.
6. Complete any other required fields.
7. Type your message in the **Note** field.
8. When you are finished, click ✅ **Send Message**.

Reply to or forward a message

Click a message to select it.

To reply to a message, click ✉ **Reply**.

To forward a message, click ✉ **Forward**.

Note: Reply and Forward options might not be available depending on the message you've received.

View messages you've sent

1. Select the **In Basket** tab and click **My Out Basket**. The folders and messages in your Out Basket appear.
2. Select a message type in the folder pane, and then select a particular message in the top right pane to view it.
3. To return to your In Basket, click **My In Basket** in the bottom left corner.

Change your default page

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

1. Select the **Menu** [Menu] icon in the top right corner of the page.
2. Click [icon] **Settings** and then click **Set Default Page**.
3. Navigate to the page that you want to set as your default page.
4. Click **Set Default Page** at the top of the application to set the current page as your default page.

Settings ▶ Set Default Page

Set your default page

You can choose the page that appears by default when you log in to WVUChart. If you choose a page which requires a patient to be selected, that activity will also be used as your default page upon selecting a patient. It will also appear when you clear a patient.

To set your default page:

Navigate to the page you want to appear by default and click the Set Default Page button at the top of the screen.

OR

Click here to clear your default page and use the system settings instead

> ℹ To reset your start page to the system default, go to the Set Default Page utility and click "**Click here to clear your default page and use the system settings instead**."

Partner Risk Manager (PRM) Instructional Guide
REQUEST FOR WVUCHART ACCESS

What to expect when requesting access to WVU Chart

Step 1.

Please visit www.wvuchart.com as soon as possible and click on "**Request New/Update account access**" and complete the required fields. *(This is for users requesting new access and also for existing users to update information)*

Step 2.

We are utilizing an application called Partner Risk Manager (PRM) to assist us with managing new and existing users. Users will receive email notifications from Partner Risk Manager after information provided in Step 1 has been entered into PRM. The email will have a sender name of donotreply@iatric.com. The email will contain a link to access Partner Risk Manager. Please do not mistake this email for spam or disregard, as it will be important to follow and complete the steps provided within the email and application as soon as possible.

Step3.

Once you receive the email notification from donotreply@iatric.com please log into Partner Risk Manager and follow the steps below:

Complete Questionnaire

Step #1

1. Print this page.

2. After printing this page scroll to the bottom of this page and click "**Next**" to start answering the questions.

3. Once you have answered the last question the "**next**" button will change to "**Submit**"

4. Click "**Submit**" *(you must click "submit" or your answers will not save)*

5. Click "**ok**"

Step #2

1. Scan your photo ID and save to your computer.

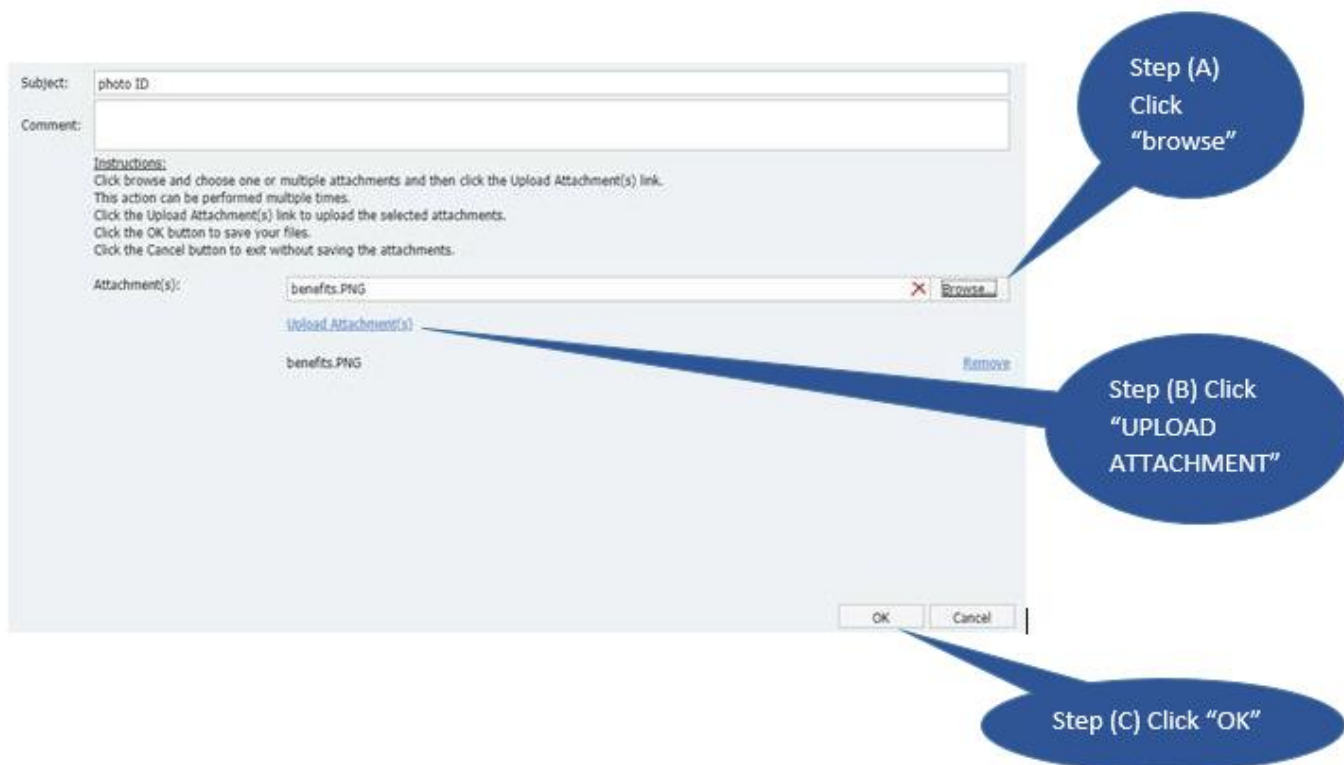2. Click on the "**green plus**" sign beside the questionnaire.
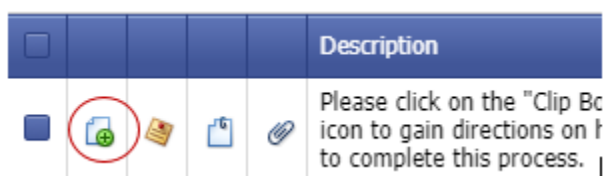
3. The box below will appear:

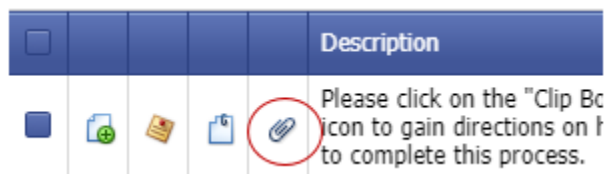   a. Click on "**browse**" and select your document.

    b. Click on "**UPLOAD ATTACHMENT**" <mark>**Please Note:** You must click "**upload attachment**" before clicking "**ok**" or the attachment will not save (see below).</mark>

    c. Click "**ok**

Step #3

1. Click on the "**paper clip**" beside the Submit privacy officer/office manager signature questionnaire.

2. Print the Privacy Officer/Office Manager document.

3. Obtain a signature from your Privacy Officer/Office Manager.
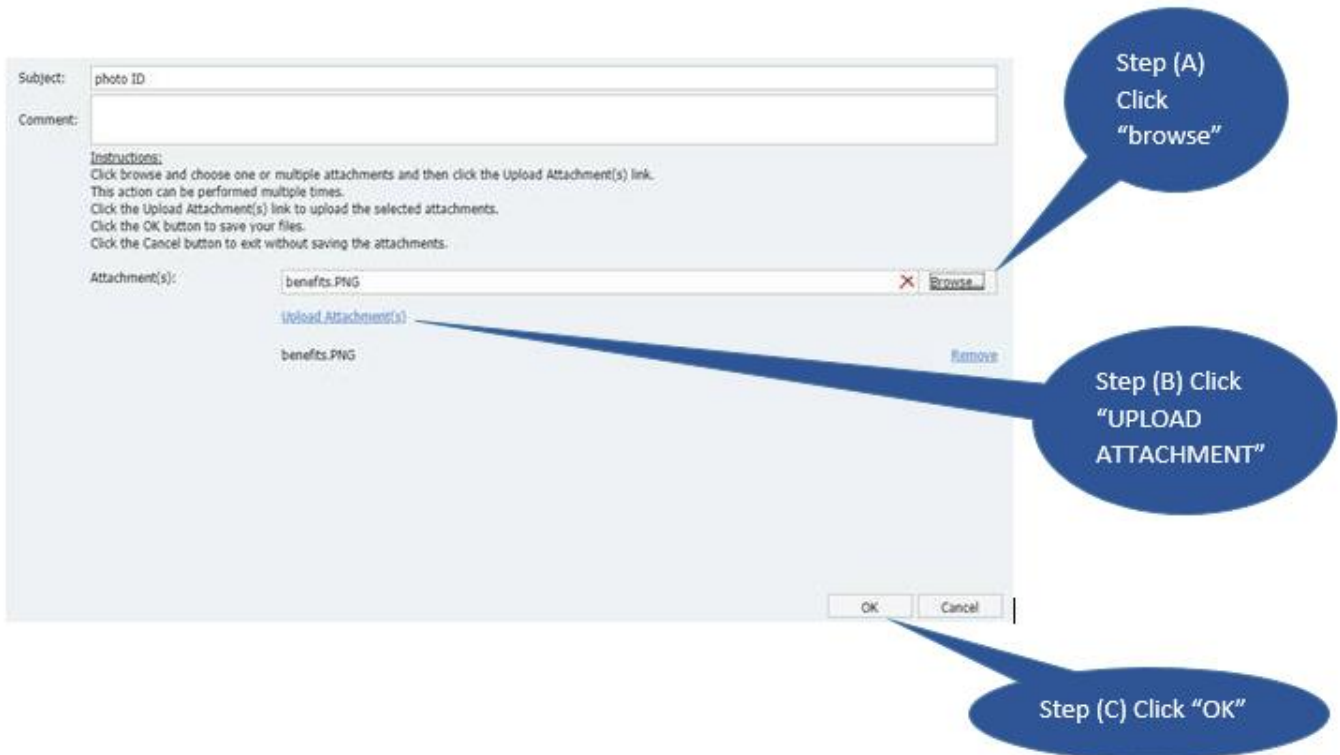
4. Scan the signed document to your computer.

5. Click on the "**green plus**" sign beside the questionnaire.

6. The box below will appear:

    a. Click on "**browse**" and select your document

    b. Click on "**UPLOAD ATTACHMENT**" <mark>**Please Note:** You must click "**upload attachment**" before clicking "**ok**" or the attachment will not save (see below).</mark>

    c. Click "**ok**

<mark>Notice:</mark>

In order to best protect our patient's information we must positively identify any person that will have access to any patient information. Users will be required to update their information annually. In addition users will also be required to submit a photo identification and a signed form by their privacy officer/office manager.

If you have any questions or need assistance please reach out to:

AffiliateCommunication@wvumedicine.org

 Or

wvum_prm_help@wvumedicine.org

PRM Password Reset Instructions

1. User needs password reset and knows their PRM User Name and email.
   a. Click on the "key" icon

2. After clicking on the "key" icon the screen below appears.
   a. Enter email address
   b. Enter user name
   c. Click "ok"

3. User receives email with temporary password.

4. User returns to the log in page of PRM.

   a. Enter user name
   b. Enter temporary password
   c. Click "log on" or press "enter"

5. After enter user name and temporary password you will be prompted to enter a new password.
   a. Must contain 1 capital letter
   b. One number
   c. One special symbol
   d. Must be at least 8 characters
   e. Click "ok"

For security reasons, you must now set your own password. Please enter your new password in the two text fields below, and be sure not to reuse a password you used before.

New Password:
Confirm Password:

OK

Providers who login using https://wvuchart.com **will need to download Imprivata to access the chart. Providers will need to access our secure Affiliate Link: WVUChart through Citrix to see imaging. Follow our Two Factor Enrollment Instructions and Citrix Download instructions to access WVUChart through Citrix**

# Imprivata: Two Factor Enrollment Instructions

Two-Factor Enrollment Citrix

Two-Factor Authentication is required to connect to the WVU Medicine Network remotely via Citrix or VPN. Please follow the steps below to enroll in Two-Factor. Connecting from the Health Science Center (HSC) to WVU Medicine Network does not require Two Factor Authentication. WVU Encrypted network is external to the HSC network and does require two factor.

You may opt to enroll later by clicking **Do This Later**, when prompted via Citrix or by entering **S** to skip when prompted via VPN. Keep in mind you will need to enroll to maintain your remote access to the WVU Medicine Network.

1. **Enrollment:** Follow the screen prompts to enroll when you connect remotely via Citrix or VPN. Enter your WVU Medicine Username and Password that you typically use for logging into Citrix, VPN or your Windows workstation. You do NOT need to use your fully qualified Username. (Use bap0003 NOT WVUHS\bap0003)

   Citrix Workflow:
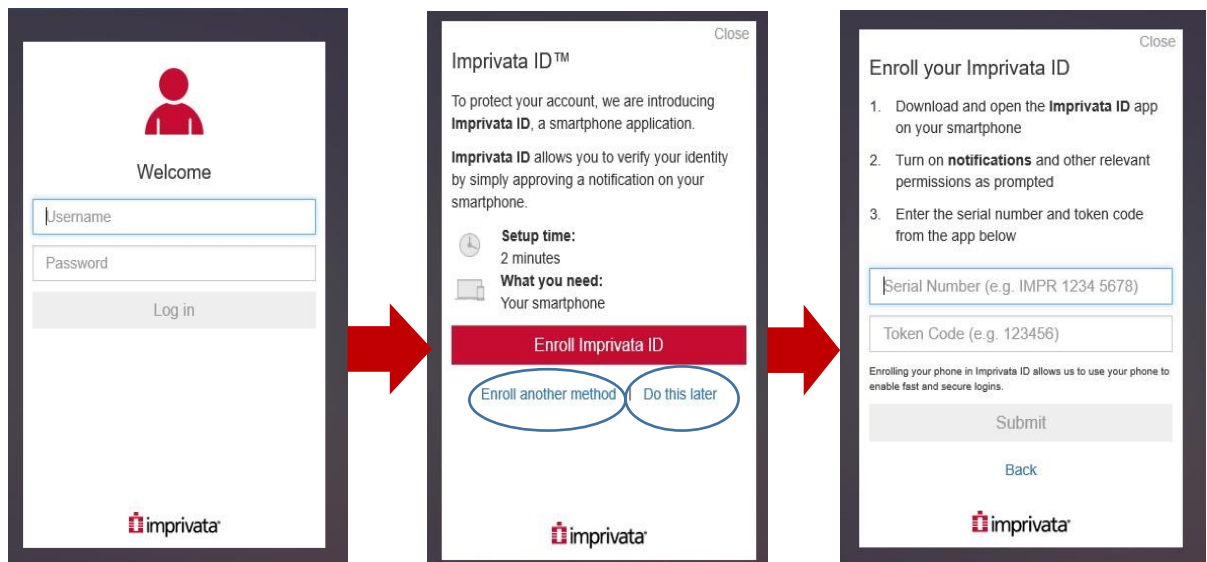
- You may enroll later by clicking, **Do this later.**
- You may enroll in SMS Text only by clicking **Enroll another method**. Enter your cell phone number when prompted. Then, enter the one-time verification code sent to your phone via text when prompted.
- Click **Enroll Imprivata ID** to enroll via the app. ○ Login to your phone's app Store on your phone and install the **Imprivata ID** Medical App. Once downloaded, turn ON notifications and Fast Access. Open the Imprivata ID app to obtain the Serial Number and the six-digit Token Code. Then enter the Serial Number (IMPR will be defaulted in

for Citrix and you must enter the 8 digits that are displayed in the phone app and the six-digit Token Code on your workstation to enroll.

- o **Approve** the push notification when received.
- You may enroll using both the phone app and text methods, by entering your cell number as a backup method. If you enroll with both methods, you will have the option to choose to receive a push message or a text message when logging in remotely. Continue to Step 2.
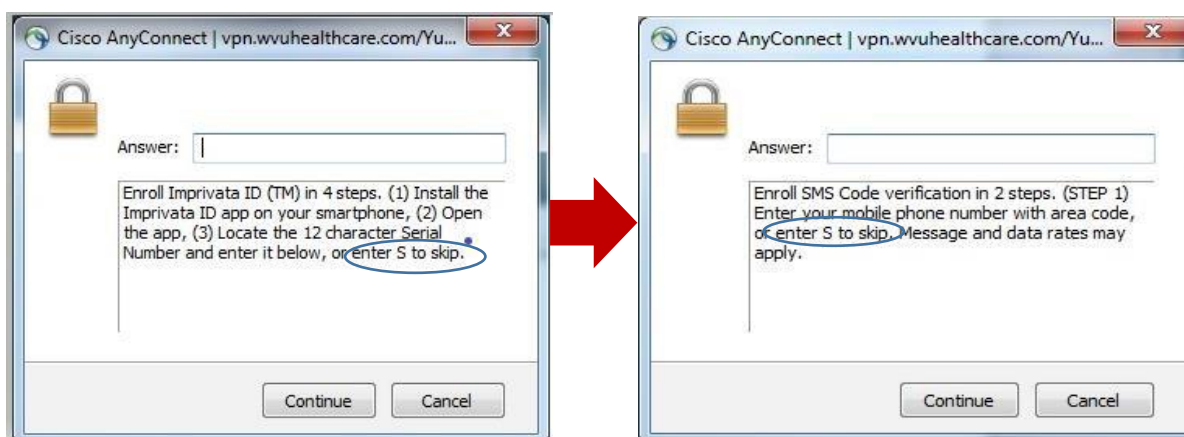
Two-Factor Enrollment Citrix

VPN Workflow:
After you login with your username and password the following screens will be displayed to enroll.   **Enroll Imprivata ID smart phone app**   **Enroll with SMS Text**

- You may enroll later by entering, **S to Skip.**
- To enroll using the **Imprivata ID** smart phone app, o Login to your phone's app Store on your phone and install the Imprivata ID Medical App. Once downloaded, turn ON notifications and Fast Access. Open the Imprivata ID app to obtain the Serial Number and six-digit Token Code, then enter the Serial Number including the IMPR xxxx xxxx (you must enter the 12 characters shown on your phone including IMPR for VPN) and sixdigit Token Code on your workstation to enroll.

- o **Approve** the push notification when received.
- You may enroll using both the phone app and text methods, by entering your cell number as a backup method. If you enroll with both methods, you will have the option to choose to receive a push message or a text message when logging in remotely.

2. You may continue using your applications on the WVU Medicine network or logout.

3. The next time you login to the WVU Medicine Network remotely, you will be prompted for UserID and Password and you will be prompted on your phone to **Approve** your login via a push message. Or, if using SMS Text you will receive a text message with a one-time verification code. Screen shots on the next page.

Two-Factor Enrollment Citrix

Push Message
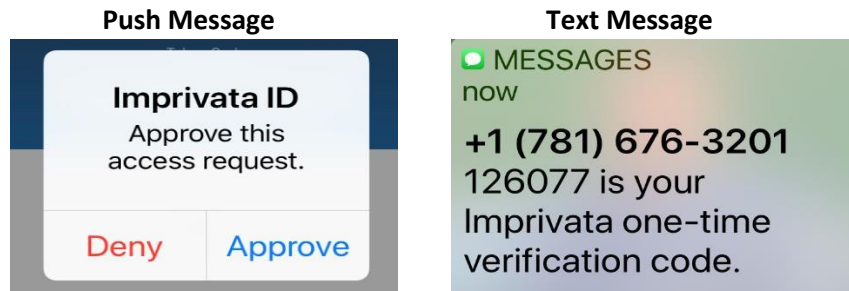
Text Message

4. If you receive a notification either via Push Message or Text Message on your phone that is not from a login that you have initiated, then **Deny** the Two-Factor Authentication and call the WVU Medicine Help Desk 304-5984357 to report that a bad actor may be attempting to utilize your WVU Medicine account credentials (username and password) remotely.

Please call the WVU Medicine Help Desk with questions concerning how to enroll in Two Factor: 304-598-4357.

Epic CareLink is a portal for external users to access the WVUChart Account.

Users will go to www.wvuchart.com to access the Epic System and to set up the two-factor authentication method. This extra layer of security helps ensure that you are the only one who can log in to your account, even if someone knows your username and password.
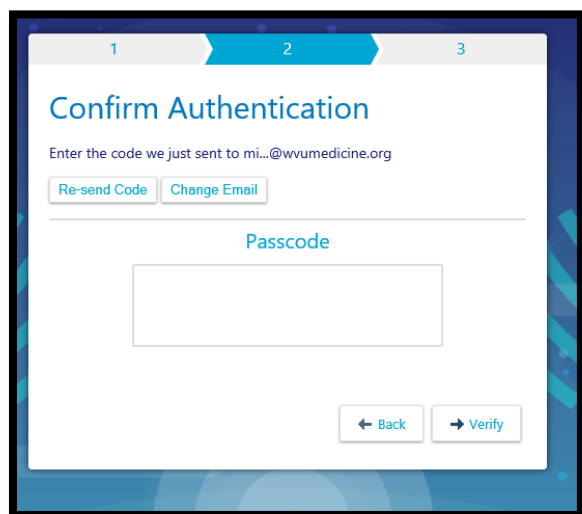
Choose how you want to receive passcodes each time you access your WVUChart account, you can choose to receive the code by email or through text message.
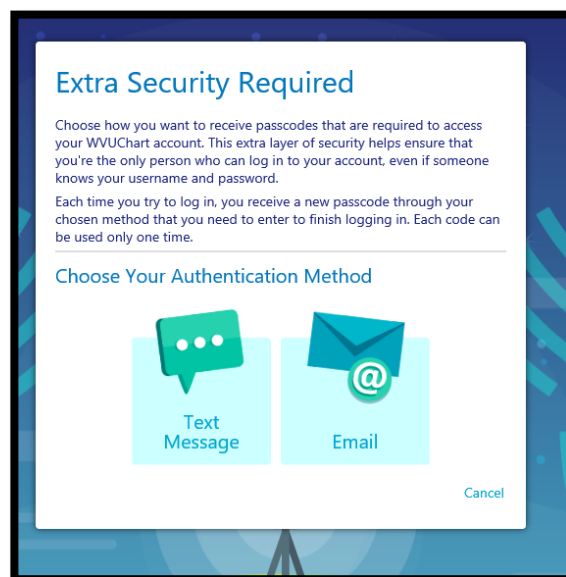
Once your account is set up you will receive a reset code, write this code down and keep in a secure spot, Check the "I wrote down the reset code" box after taking note of the code. This will code be needed if you lose access to your chosen authentication method.

The user will be prompted every 30 days for two-factor authentication. It is browser specific, so if the user logs in from Internet Explorer one day and Chrome the next, the user will be prompted each time for two- factor authentication each time.

Enter the passcode to confirm authentication.

Affiliate Link\WVU Chart\EpicCare Link Two Factor Authentication

Help desk notes:

If the user needs to change their two factor authentication method, email address, or phone number and they don't have the "Reset Code" that they were prompted to write down, this can be reset via Epic Hyperspace:

User security, Web Suite, 2FA Settings, then the Reset 2FA button.
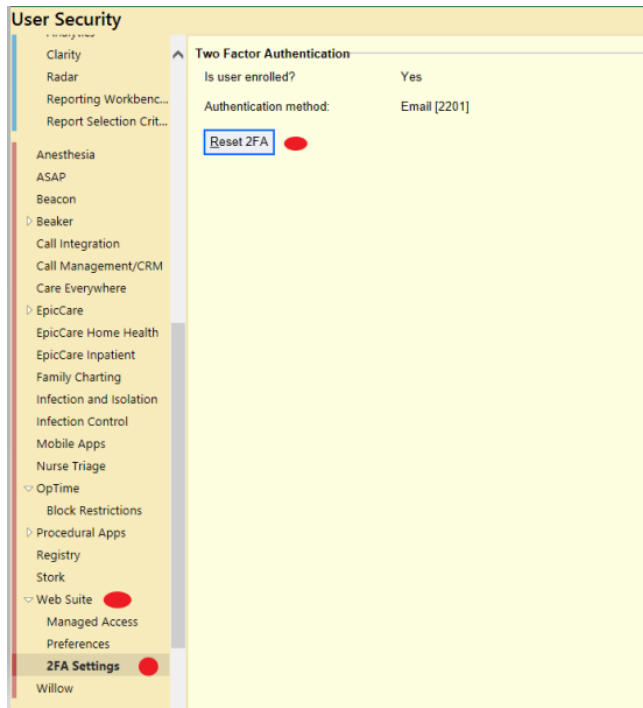
If users get frustrated with having to do the two factor auth twice as a citrix user, you may want to offer to them that they can go to www.wvuchart.com and access there as long as they don't need to view scans or images.

Citrix Download Tip Sheet

In order to access WVU Chart's full functionality including scans and images, Citrix receiver will need to be downloaded.

Type apps.wvumedicine.org in the browser window and sign in with your username and password. **Click 'Log In'**
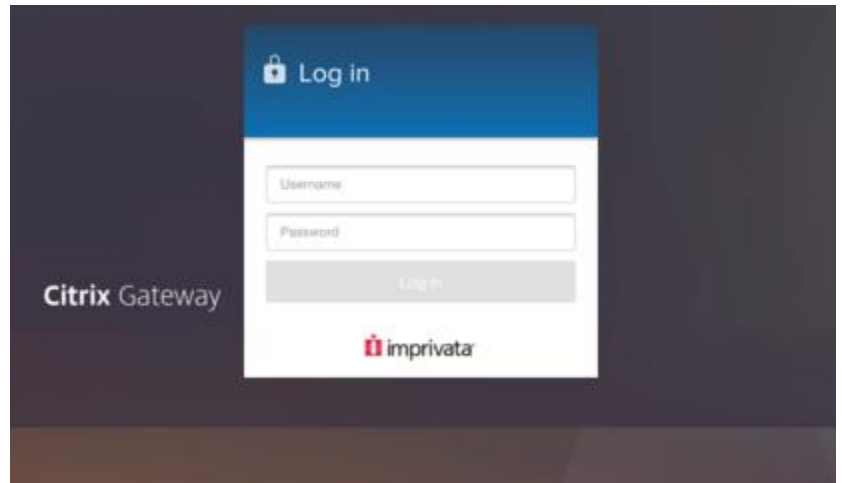
Click "Detect Receiver."
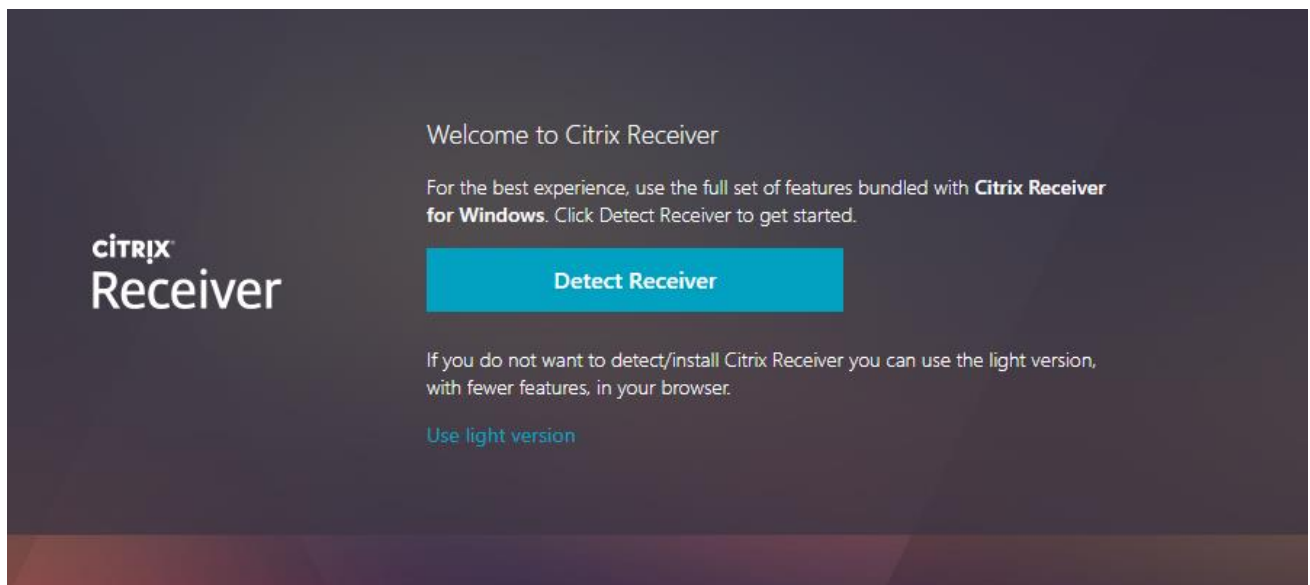
Agree to the license agreement and **click "Download"** if citrix was not detected on the PC.
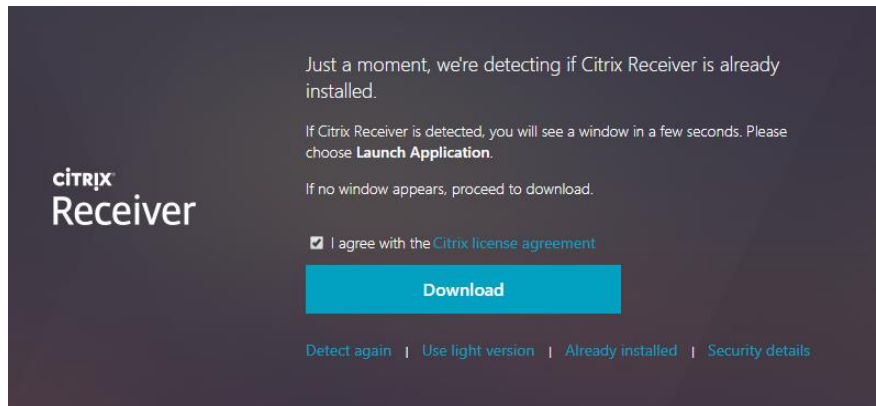
Wait while citrix downloads:
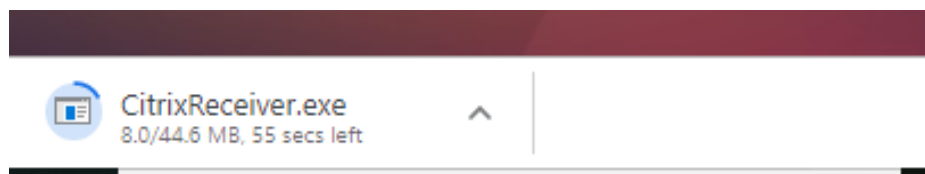
A screen with this heading lets you know you have arrived in citrix, click on Apps and find the Afflink icon. **Select the "Afflink"** to access the WVUChart login screen
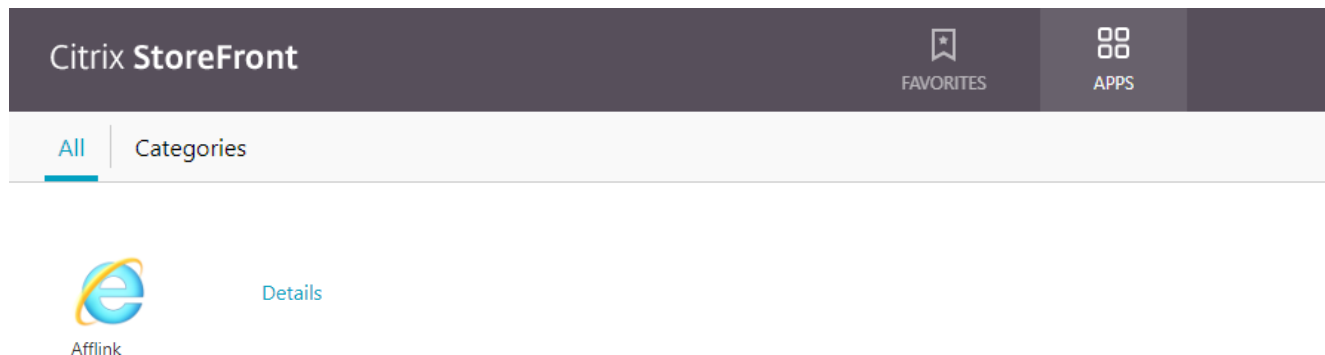
Sign in with your username and password.
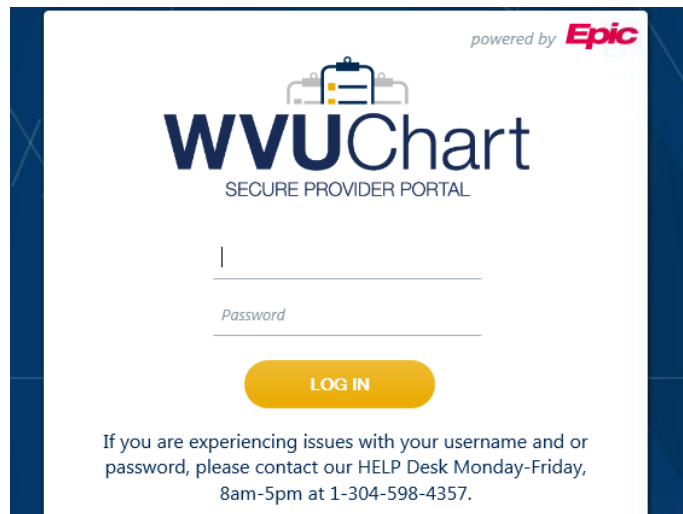
NOTE: For subsequent logins after citrix has been installed, go to apps.wvumedicine.org, you will be prompted to login, find the Afflink icon, and then enter the username and password again.

TROUBLESHOOTING

- If citrix does not load, try "use light version".
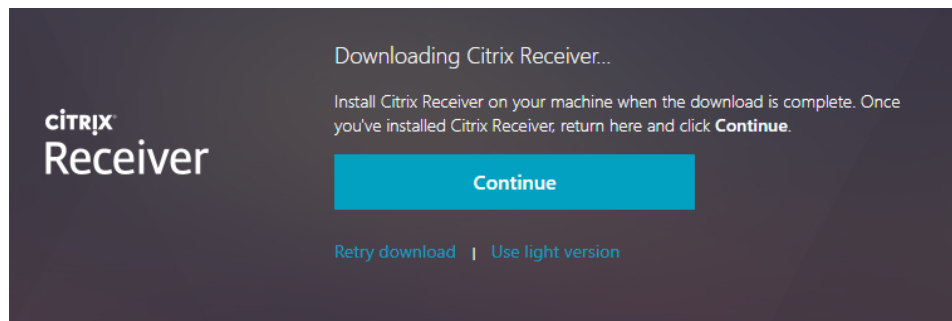
- If citrix won't launch after it has been installed, close the browser completely then find Citrix receiver in the start menu or at the bottom right hand side of the screen.

- If Citrix won't launch at this screen, try clicking "Already installed" or "Use light version".
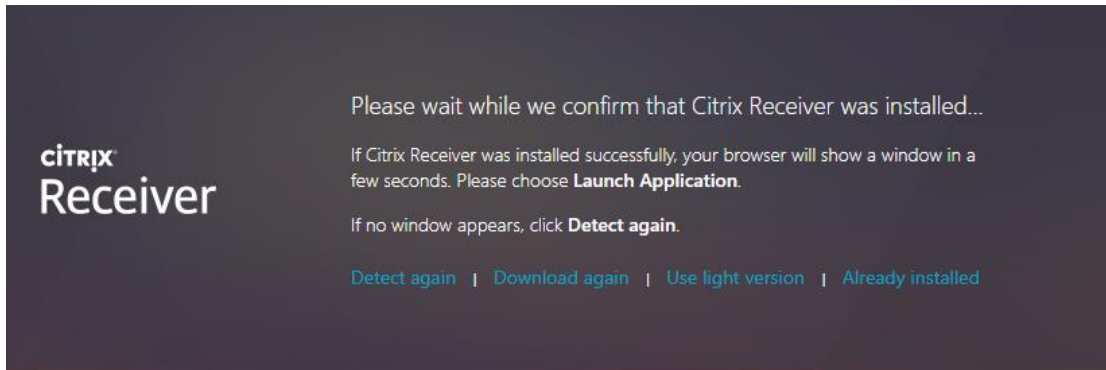
COVID – 19 SCREENING ORDER – AFFILIATE LINK (WVUCHART)

WVU Medicine nonaffiliated clinics are now able to place and sign COVID-19 screening orders. Orders will be received by all WVU COVID-19 testing centers. Turnaround for results is estimated at 3-5 days.

Please, read before continuing to the workflow

a. *Providers must have access* to WVUChart to sign the COVID-19 screening order. Providers or Clinic managers will need to follow the steps in the "Requesting Access to WVUChart" to request access if they do not already have it. Providers that already have access do not need to request additional access.

b. MA's, LPN's and RN's are not able to sign the COVID-19 screening order, but they are able to place and pend the order for the provider to sign.

c. The clinic manager can request access for all providers at the clinic. There is a section to provide a list of all providers in the clinic when requesting access.

Placing COVID-19 Screening Order:

Providers and clinical staff will follow the same process to place the order. Providers will be able to "Accept" the order while clinical staff will need to "Pend" and send the order to the provider. The order will not be valid until it is "Accepted" (signed) by the provider.

d. Click "Place Referral" on the homepage after you have logged in.

e. Click "Search My Patients". Use the search bar to search for your patient. Use the patient's first and last name when searching. Click the appropriate patient.
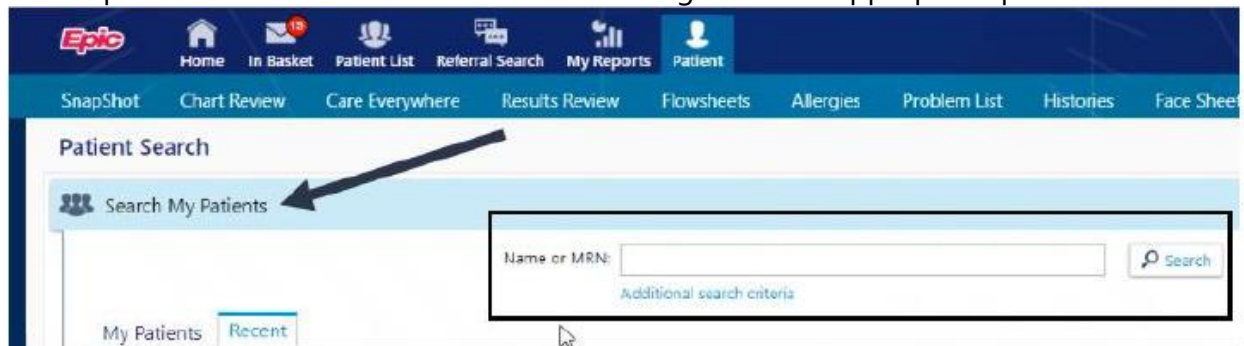
f. Select "Referring Provider". This is the authorizing provider who will sign the order

g. Select the "Preference List" or search for "COVID-19 Screening – Send-Out". The COVID-19 Screening order is located under the "Labs" section. Click "Accept" to complete the order.
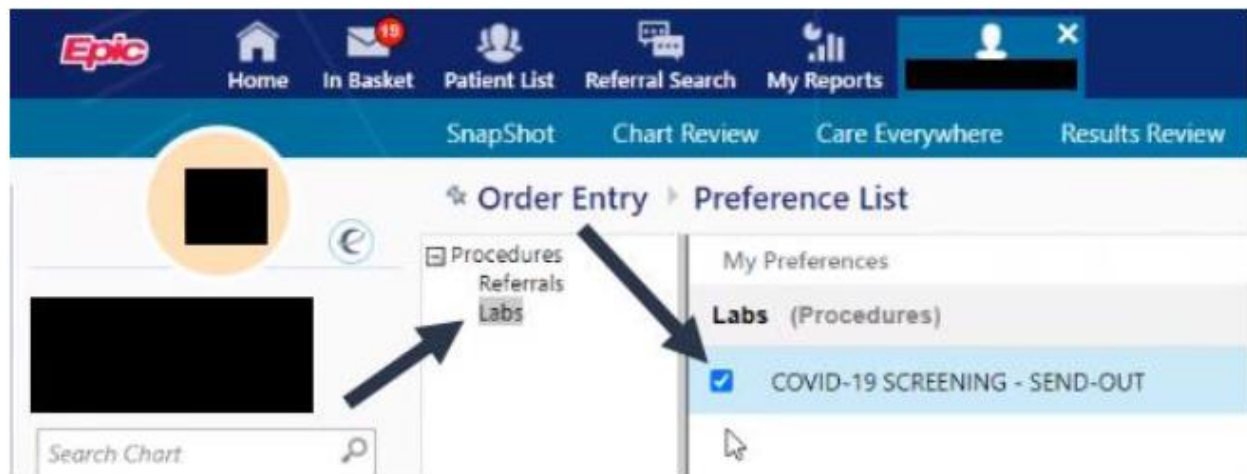
h. Complete only the sections of the order that have stop signs. The rest of the section will auto populate after the order is "Accepted"

i. Providers will diagnose and sign the orders by clicking "Accept Orders". This will send the order completing the process. Add the "Exposure to COVID-19 virus" as the diagnosis.

Please make a selection

exposure covid [Search]

Search Matches:

%	ID	Name	ICD-10 Codes	ICD-9 Codes
85.63%	1494911738	Exposure to COVID-19 virus	Z20.828	V01.79

Clinical staff will need to click "Pend Orders." They will populate a security error message if the Accept Orders button is selected. Clinical staff can still sign referral orders.
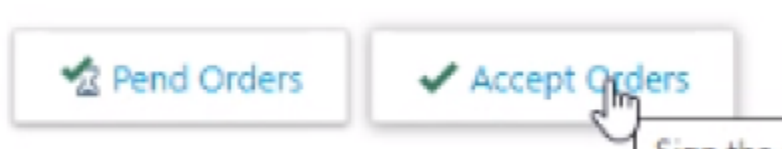
Signing Pended Orders from the In Basket
Providers will only need to sign the order from their in basket if their clinical staff are pending the order.

      j. Go to the In Basket located in the toolbar at the top of the home screen

            i. Click the "My Unsigned Orders" folder

            ii. Select the order

            iii. Click "Encounter" located in the toolbar above the orders

      k. Add the "Exposure to COVID-19 virus" diagnosis to the order by clicking the "Pencil" located in the top right of the order.

l. Scroll to the bottom of the order. Use the search bar to add the "Exposure to COVID-19 virus" diagnosis. Click Accept

m. Sign and send the order by clicking "Accept Orders" in bottom right.

Requesting Access to WVUChart

1. Go to wvuchart.com and click "Account Access" located beneath the login. Clinical Managers can request access on behalf of their providers.

2. Click the link on the next page to start the Access Request form

3. All fields of the form must be completed. It is important to select the appropriate access. See below:

    a. **For provider access**, please select "Providers (Access to sign Covid orders and view patients clinical information that you have a relationship too"

    b. **For MA, LPN, RN, Referral Coordinator Access**, please select "Clinical Staff (Access to place referral/Covid orders as well as view clinical information for you patients)"

4. The final step is to accept and submit the form. Located in the bottom right.

Patient Handout Information

Please, give the patient the WVU Medicine Covid-19 Testing Information. Test center location and times of operation are listed, as well as what the patient can expect after the test is completed. Links to the WVU Medicine and CDC Covid-19 information webpages are also listed.

WVU Medicine:
https://wvumedicine.org/covid/

Centers for Disease Control:
https://www.cdc.gov/coronavirus/2019-nCoV/index.html