

# Carelink Access Management User Guide



# Carelink Access Management Guide

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## What is Carelink and how do I use it?

Carelink is a view-only portal for organizations that have an affiliated relationship with Bon Secours or Mercy Health and any of its subsidiaries.

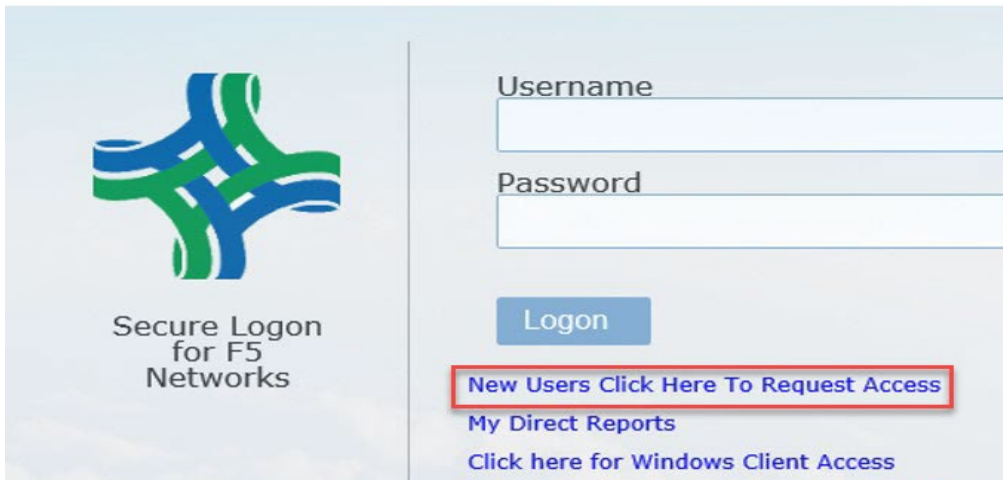
## What is an Account Access Manager and what are their responsibilities?

An Account Access Manager can create/setup new users under their Direct reports, enabling the users to access the Mercy Health Carelink application.

1. Identify a delegate that can assume your account Access Manager duties while you are absent.
  - a. [Link for how to setup a delegate](#)
2. Request an active directory account (network login) be created for your staff members.
3. Request application access (Carelink, OneContent)
4. Accounts will be created with an expiration date no further than 6 months in the future.
5. The Account Access Manager will receive up to 5 expiration notification emails whenever one of their staff's account is about to expire.
  - a. First notification is sent one month prior to the expiration date. Subsequent emails continue weekly to help ensure access is not lost without warning. The last notification is sent the day prior to the expiration date.
  - b. If no action is taken by the Account Access Manager to extend their staff's expiration, access will be put on pause (unusable) for 90 days. If an account remains in a "paused" status for 90 days, it is deleted.
  - c. During the 90 day "paused" period the Account Managers can extend an expiration date for up to 180 days in the future. This will permit staff to access their account again.
6. Immediately terminate any staff member that no longer requires access.

## How do I request access for Carelink for a new location?

1. If you are a New location (facility has never used Carelink)
  - i. Go to Carelink weblink <https://Carelink.health-partners.org>.
2. Click the link “New Users Click Here to Request Access”



Secure Logon  
for F5  
Networks

Username

Password

Logon

[New Users Click Here To Request Access](#)

[My Direct Reports](#)

[Click here for Windows Client Access](#)

3. Click on “Carelink New Location Setup Process”
  - a. The page that displays is depicted in part on the next page:

## CareLink for all New Location Setup Process

This process is meant to be utilized by Bon Secours Mercy Health (BSMH) Affiliated Partners in order to request their Organization to be setup with CareLink access. This access provides authorized affiliated users the ability to access patient's clinical data including pertinent medical records, patient history, demographics, and images for treatment purposes as well as the ability to communicate with BSHM staff in order to provide quality patient care.

Established Locations will then utilize the Standard BSMH Account Management Processes for establishing and maintaining their staff's access to CareLink.

- You can validate your location setup along with who your Account Manager and BSMH Liaison is [here](#):

BSMH CareLink access can be provided to a wide range of affiliated users that assist in providing care and other support functions to BSMH patients.

- Serviceable (allowed) locations include but are not limited to:
  - Medical offices
  - Skilled Nursing Facilities
  - Assisted/Independent Living Facilities
  - Long Term Acute Care Hospitals (LTACH)
  - Home Health Facilities
  - Rehab Facilities
  - Hospice Facilities
  - Lab Facilities
  - Imaging Facilities
- Non-Serviceable (not allowed) locations include but are not limited to:
  - Pharmaceutical Companies
  - Medical Sales Companies
  - Durable Medical Equipment(DME) Companies
  - Non-Affiliated Personal Users
  - Ambulance Companies

In order to have your Organization establish on BSMH CareLink please have a person of authority from your Organization that will be responsible for the Account Management of your staff fill out the form below for review. Once received a BSMH CareLink Liaison will be in contact with you to review the submission and discuss next



Start New Location Application

- b. After reading and understanding who can request Carelink, click the “Start New Location Application” button at the bottom of the page.
- c. Use the green navigation buttons at the bottom of the window and fill in the required fields. The system will prompt you if you miss a field.
- d. The last screen of the application has the required security agreement for download, completion (either electronically, or printed, filled in, and scanned) and then placing in the box marked “Drop files here”.

- a. The security agreement is here: ([Security Agreement](#))

\*Reminder please be sure to attach the signed Security Agreement so your request to be processed

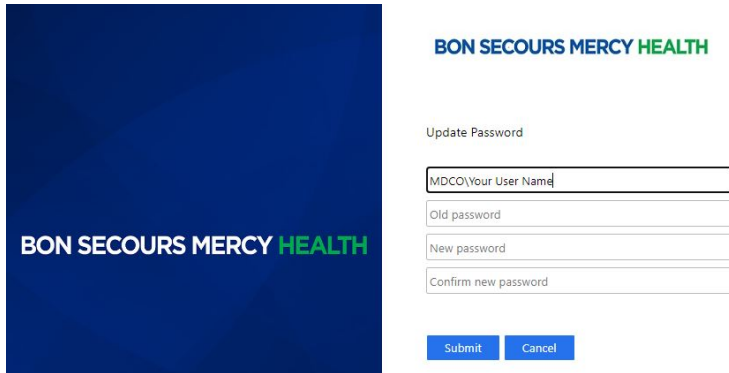
- b. Your Carelink Liaison will notify you when your account is ready with your login and password.
- c. Note: The full process may take 2-3 weeks to complete.

# How do I get access for others at my location as the new Account Access Manager?

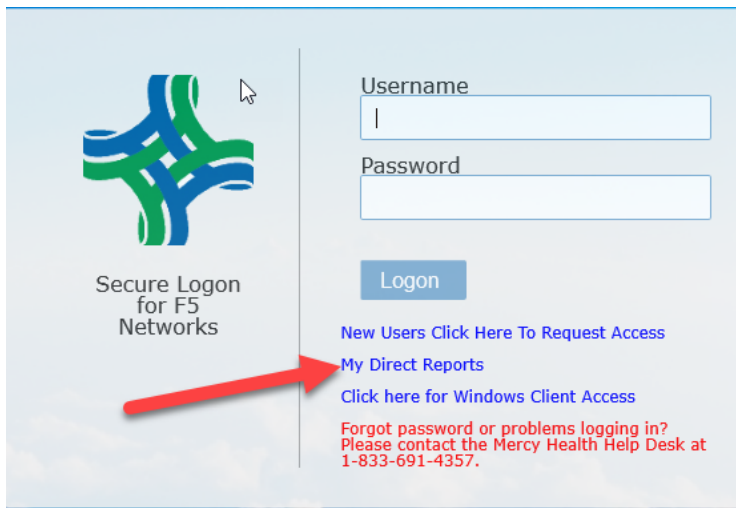
Once you have received information from your Carelink liaison:

## First Login – Change password

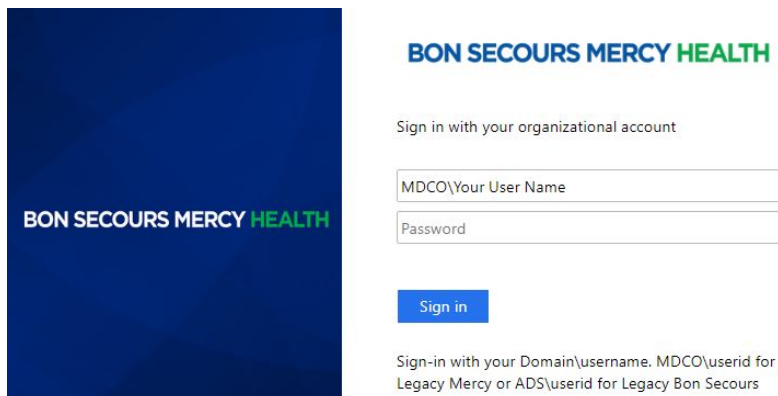
1. Go to <https://sts.health-partners.org/adfs/portal/updatepassword/>



2. Once your new password is established, go to <https://Carelink.health-partners.org> and click “My Direct Reports”



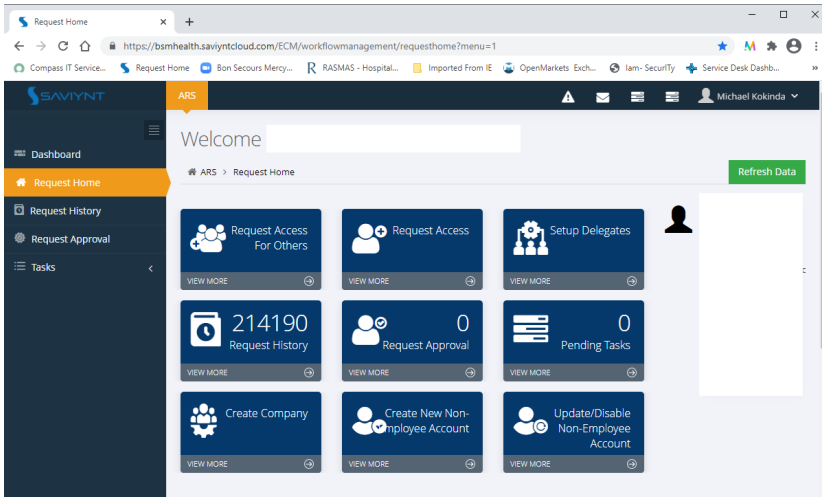
- a. Register for 2 Factor Authentication which is required to access “My Direct Reports”
  - i. [See Symantec 2 Factor Authentication in the Appendix](#)
- b. Login by entering MDCO\your username in the Username box and your password in the Password box.



# Creating and Requesting Access for your Users

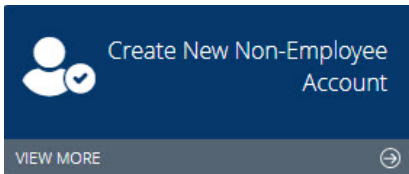
The “Request Home” is the default view displaying various tile options on the right

**FYI:** Depending on the level of security assigned to your account, other menu items and tiles may display.



## Create a New Non-Employee Account

1. Have your new user complete a Mercy Contractor Security Agreement
  - a. Follow this link to get the current agreement form ([Security Agreement](#))
  - b. Have your new user complete the agreement and save it so you can upload it.
  - c. You will upload the signed agreement in step 3 of this process.
2. Click the tile for Create New Non-Employee Account



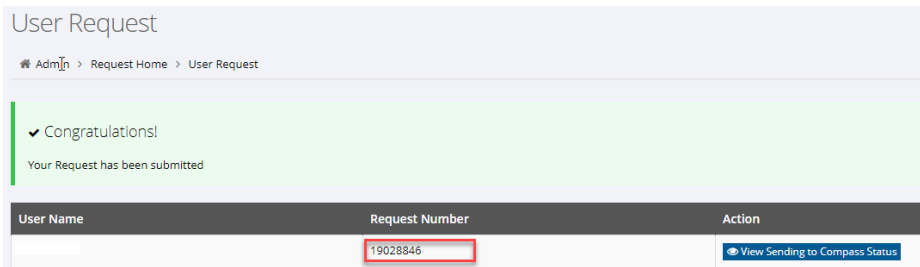
3. (refer to the image below) Fill in all the boxes that have a red asterisk \*. Make sure to select your market first (refer to this [list](#) to determine your market), then the appropriate NonEmp-CarelinkAccessONLY role. Select your company from the list. Change the signed security agreement dropdown to say “Yes”. Click the “Click here to attach file” to attach the signed security agreement from your user.

- a. Click the submit button at the bottom right of the screen.
  - i. As of 9/15/2021, requesting the correct CarelinkAccessOnly for your market, will complete all items required. [See the appendix for a full list of the roles by market.](#)



- ii. When submitting requests please select the appropriate Market. The ONLY role that you should be selecting is CareLINKAccessONLY. If you pick a different role the requests will not be generated.

b. Retain the Request Number for reference.

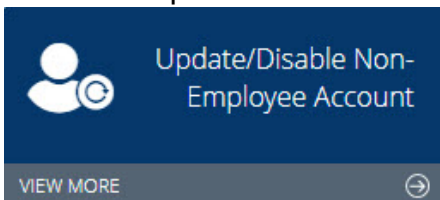


- c. You will receive an email from “AccountsAndAccess@BSMHealth.org” notifying you the AD account has been created (can take up to 7 business days).
  - i. There will be a separate email with the initial password for the new user.
  - ii. There will be a separate email that confirms that HPF OneContent access has been created.
  - iii. There will be a separate email the confirms that Carelink access has been created.
  - iv. The email address that sends confirmation is “IT Service Desk bsmhealth@service-now.com” when the access requests are complete.
- d. **It is recommended to NOT share the new login with your user until all requests are complete (Carelink and OneContent)**

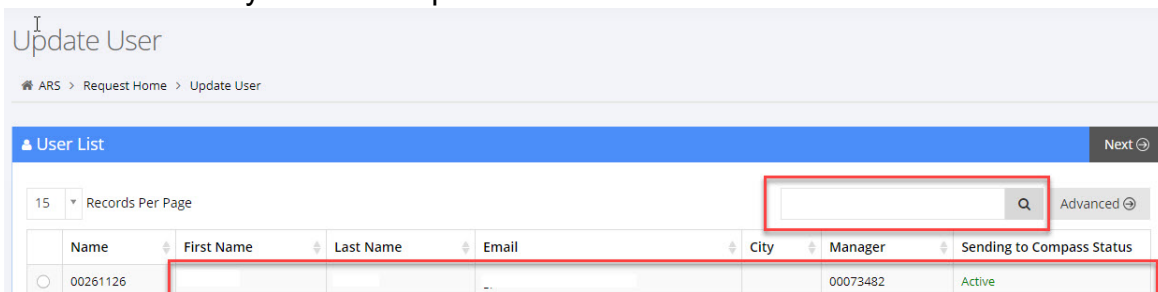
## Managing User Accounts

### Extending Access

- 1. Non-employee accounts require extensions at a minimum every 180 days.
  - a. Register for 2 Factor Authentication which is required to access “My Direct Reports”
    - i. [See Symantec 2 Factor Authentication in the Appendix](#)
  - b. Access “[My Direct Reports](#)” as described earlier.
  - c. Click the “Update User Tile



d. Search or select your direct report.



e. The Update User Form will load. Information given when your user was created will be populated in the various form fields. Select the calendar icon and extend your user to the

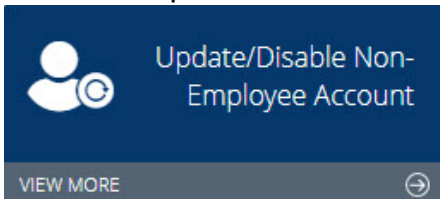
desired date (maximum of 180 days). Click the submit button.

The screenshot shows the 'Update User' form with the following fields: First Name \*, Last Name \*, Middle Initial, Expiration Date (Max 180 Days) \*, Email, Work Phone, Mobile Phone, Job Title \*, and a dropdown menu for 'Select "Disable" to Disable the User'. A 'Submit' button is located at the bottom right. The 'Expiration Date' field is highlighted with a red box.

## Disabling Accounts

1. **When an associate leaves your organization, it is extremely important that you disable their account to BSMH resources.**

- Access ["My Direct Reports"](#) as described earlier.
- Click the "Update User Tile"



c. Search or select your direct report.

The screenshot shows the 'Update User' page with a 'User List' table. The table has columns for Name, First Name, Last Name, Email, City, Manager, and Sending to Compass Status. A search bar is located above the table, and a row in the table is highlighted with a red box. The 'Manager' column contains the value '00073482' and the 'Sending to Compass Status' column contains 'Active'.

2. The Update User Form will load. Information given when your user was created will be populated in the various form fields. Click the dropdown for "Disable User" and select the "Disable" option.

3. The Update User form refreshes to show the "You must select 0 to Disable" drop down. Click the drop down and select 0, then click the submit button.

The screenshot shows the 'Update User' form with the 'Disable User' dropdown menu highlighted with a red box. The dropdown menu is open, showing the option '0'. The 'Submit' button is also highlighted with a red box. The text 'Select 0 to Disable. You must select 0 to Disable' is visible above the dropdown. Below the dropdown, there is a message: 'Click submit when finished or use the back button on the browser to cancel'.

## Appendix

### Correct Roles by Market when creating new users:

**CHPO:** Lorain Market including Mercy Lorain and Mercy Allen Hospitals

CareLINK Role: NDIV-CHPO-NonEmp-CareLINKAccessONLY

**CMHP:** Springfield Market including Mercy Springfield and Urbana Hospitals

CareLINK Role: CDIV-CMH-NonEmp-CareLINKAccessONLY

**HMHP:** Youngstown Market including St. Elizabeth Youngstown, St. Elizabeth Boardman, and St Joseph's Warren Hospitals

EDIV-HMP-NonEmp-CareLINKAccessONLY

**KYIN:** Kentucky Market including Lourdes

SDIV-KYIN-Paducah-NonEmp-CareLINKAccessONLY

**KYIN:** Kentucky Market including Marcum and Wallace Hospital

SDIV-KYIN-MWM-NonEmp-CareLINKAccessONLY

**MHPN:** Toledo Market including St. Anne, St. Charles, St. Vincent, Defiance and Willard Hospitals

NDIV-MHP-NonEmp-CareLINKAccessONLY

**SWOH:** Cincinnati Market including Anderson, Fairfield, Clermont, Jewish and West Hospitals

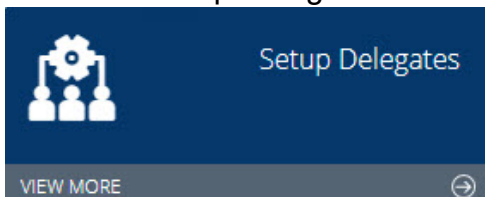
CDIV-SWO-NonEmp-CareLINKAccessONLY

**WCOH:** Lima Market including St Rita's Hospital

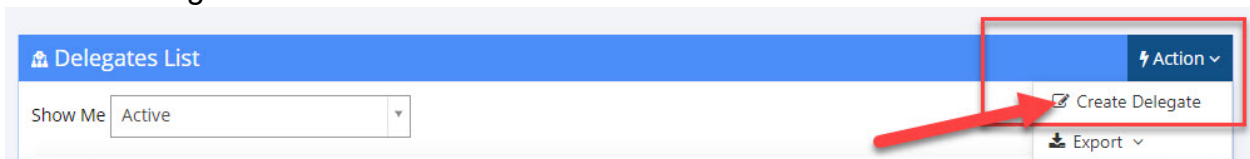
NDIV-WCO-NonEmp-CareLINKAccessONLY

### How to set up a Delegate

1. A Delegate is a representative from a site utilizing Carelink that can perform the duties of the Account Access Manager when necessary. *It is very important to understand that a delegate for an access manager must have account management permissions. See step 5 for requesting account management for your delegate.*
  - a. Access "[My Direct Reports](#)" as described earlier.
2. Click the "Setup Delegates" Tile



3. The Delegates form loads. To create a Delegate for yourself, select the "Action" dropdown and click "Create Delegate".



4. The “Create Delegate” form loads. The example below demonstrates Michael selecting Elizabeth as a delegate for the period of January 14<sup>th</sup> to January 31<sup>st</sup>. Use a time period that makes sense for your organization.
  - a. The “Parent User” is you, click “Select User” to search for your account.
  - b. The “Delegate User” is the associate at your facility that will be able to perform access manager functions when necessary. Click “Select User” to search for the associate’s account.
  - c. Once both users are selected, click “Create”.

ARS > Request Home > Delegates > Create Delegate

**Create Delegate**

Name \* Elizabeth  
 Description \* Covering RM  
 Parent User \* Michael **Select User**  
 Delegate User \* Elizabeth **Select User**  
 Start Date \* Jan 14, 2021  
 End Date \* Jan 31, 2021  
 Back Create

5. Account management. This tool is ONLY required for the Account Access Manager for your site and your delegate. Do not request this for any other user at your site.
  - a. Access “[My Direct Reports](#)” as described earlier.
  - b. Select the “[Request Access for Others](#)” as described earlier.
    - i. Proceed to step “c” when you have your user selected.
  - c. In the **Search** field type “Account Management” and click “Add to Cart”.

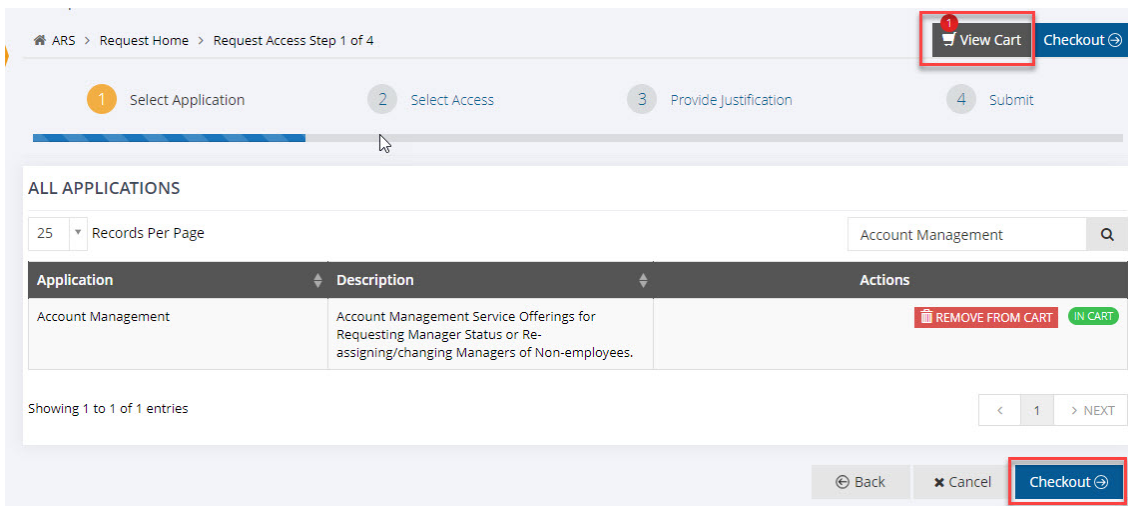
1 Select Application 2 Select Access 3 Provide Justification 4 Submit

ALL APPLICATIONS

25 Records Per Page Account Management

Application	Description	Actions
Account Management	Account Management Service Offerings for Requesting Manager Status or Re-assigning/changing Managers of Non-employees.	<b>ADD TO CART</b>

d. The Select Application form will refresh adding account management to the cart. Click “Checkout”.



e. The Account Management Form will load. Click the dropdown for “Account Manager Setup” and select Carelink from the list. Lower in the form, click the “+ADD” button next to “Request Account Manager Status”. Then click “Next”

### Account Manager Setup

Please list what type of nonemp accounts this account manager will manage

Carelink

### Non-Employee Reassignment

Please list name of new account manager needed for this direct report.

### Available Enterprise Roles

Advanced

Role Name	Description	Action
Non-Employee Manager Reassignment	This is used when Non-Employees require a manager update in the same job role. If the user is starting a new job role a new user request should be submitted. Employee adjustments are completed by HR.	+ ADD
Request Account Manager Status	This is used by authorized BSMHealth Employees to setup an Employee or Non-Employed user as an Account Manager to Create, Modify, and remove access for their associated staff. Requires Approval.	+ ADD

Showing 1 to 2 of 2 entries

### Selected Enterprise Roles \*

Action	Role Name	Description
No data available in table		

Showing 0 to 0 of 0 entries



Back Next

f. The form will refresh and show “Request Account Manager Status” in the right-hand pane.

Account Manager Setup

Please list what type of nonemp accounts this account manager will manage

Carelink

Non-Employee Reassignment

Please list name of new account manager needed for this direct report.

Available Enterprise Roles Advanced

Role Name	Description	Action
Non-Employee Manager Reassignment	This is used when Non-Employees require a manager update in the same job role. If the user is starting a new job role a new user request should be submitted. Employee adjustments are completed by HR.	+ ADD

Showing 1 to 1 of 1 entries

Selected Enterprise Roles \*

Action	Role Name	Description
REMOVE	Request Account Manager Status	This is used by authorized BSMHealth Employees to setup an Employee or Non-Employed user as an Account Manager to Create, Modify, and remove access for their associated staff. Requires Approval.

Showing 1 to 1 of 1 entries

Back Next

g. The Account Management form loads with fields for Business Justification or Comments if needed. Click “Submit” to complete the request.

Account Management

Account Name Endpoint  
Account Management

Employee To Non-Employee Status

To change Direct Report from Employee to NonEmployee(Contractor/Staff Position) select Create New Non-Employee from the Request Home Page as well as inform HR of the transition.

Account Manager Setup

Please list what type of nonemp accounts this account manager will manage

Carelink

Non-Employee Reassignment

Please list name of new account manager needed for this direct report.

Role:Request Account Manager Status TYPE ADD ACCESS BUSINESS JUSTIFICATION

This is used by authorized BSMHealth Employees to setup an Employee or Non-Employed user as an Account Manager to Create, Modify, and remove access for their associated staff. Requires Approval.

Comments (No Additional Applications will be granted based on Comments)

- h. The screen will refresh with the congratulations screen and your delegate should be able to perform the following activities:
- i. Request a New Non-Employee
  - ii. Order Access
  - iii. Approve Access
  - iv. Update a Non-Employee
  - v. Disable a Non-Employee

## Frequently Asked Questions:

1. How do I request access for Carelink for a pre-existing location?
  - If you are already the Account Access Manager for this location, please go to the section [“How do I get access for others at my location as the new Account Access Manager?”](#)
  - If you are a staff member, please ask your Account Access Manager to submit the requests on your behalf. If you do not know who your Account Access Manager is, please email your Carelink Liaison for your region. To email your Carelink Liaison [see this table](#).
2. Our Account manager left how do we create a new account manager?
  - If your Account Access Manager is no longer at your location, please identify an Account Access Manager and email your Carelink Liaison for your region. To email your Carelink Liaison [see this table](#).
3. Are you already a Carelink user but work for a different facility now?
  - Email the Carelink liaison for your region. To email your Carelink Liaison [see this table](#).
  - At your new location please ask your Account Access Manager to submit the requests on your behalf. If you do not know who your Account Access Manager is, please email your Carelink Liaison for your region. To email your Carelink Liaison [see this table](#).
  - If your new location is not set up to [See this part of the Guide](#)
4. I have a staff member that has left how do I terminate them?
  - Please refer to [“Disabling Accounts.”](#)
5. I am an Account Access Manager and my account access expired what do I do?
  - Respond to the email expiration email you would have received.
  - Email your Carelink Liaison for your region. To email your Carelink Liaison [see this table](#).
  - The Account Access Manager can also contact the Service Desk at 1-833-MY1HELP
6. I have requested access, but my staff is unable to login.
  - Requesting access is a two-step process where you first request a Bon Secours or Mercy Health username. The next step is to request access to Carelink once the username has been created. If your Account Access Manager confirmed that all requests for access have been completed and you still cannot log into Carelink please contact the Service Desk 1-833-MY1HELP
7. I can't get into My Direct Reports what do I do?
  - Please refer to [“How do I get access for others at my location as the new Account Access Manager?”](#) and remember to put **MDCO\** in front of your username.

## Glossary:

1. Carelink Liaison
  - a. The BSMH associate that manages access for Carelink account access managers or in some cases individual Carelink users. Each BSMH market has one or more Carelink Liaisons.
2. Account Access Manager
  - a. The Account Access Manager is the representative for a site utilizing Carelink that creates and manages users for that site.
3. Active Directory
  - a. Microsoft tool for managing users and what they have access to in a Microsoft based network.
4. OneContent (HPF)
  - a. OneContent is the current document imaging and storage platform for paper items scanned a Hospital encounter.
5. BSMH: Bon Secours Mercy Health
6. Delegate
  - a. A Delegate is a representative from a site utilizing Carelink that can perform the duties of the Account Access Manager when necessary.

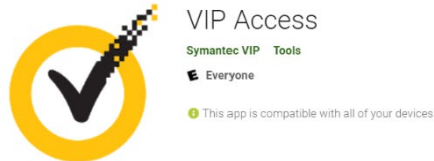


# BON SECOURS MERCY HEALTH

## Symantec VIP Self Service Setup Guide for Smart Devices

### Download the VIP Access app.

1. From your smart device, visit the app store (Google Play or Apple's App Store) and download VIP Access by Symantec.



### Register your Device

1. From a web browser, go to the Self Service Portal at <https://sspidp.ads.bshsi.com:8233/vipssp> and enter your BonSecours Mercy Health **username and password** to login. *Note: This is the same username and password used for email, Connect Care, CarePath, Carelink, and CCLink.*
2. Confirm your identify by selecting **Email address** and clicking **Continue**. This will send a temporary password to youremail.



#### Welcome to the Symantec® VIP Self Service Portal

To access the Self Service Portal, enter your user name and password, and click **Sign In**.

Sign In

User Name: DALT513

Password: .....

Sign In

#### To Complete Your Sign-in

Request a temporary security code to help confirm your identity.

Confirm Your Identity

How would you like to receive your security code?

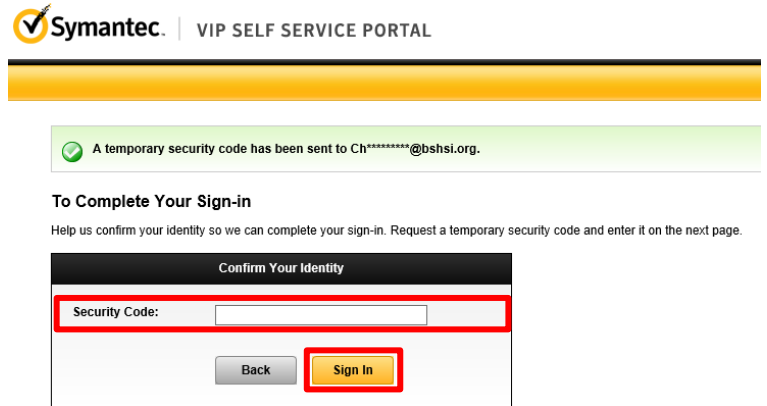
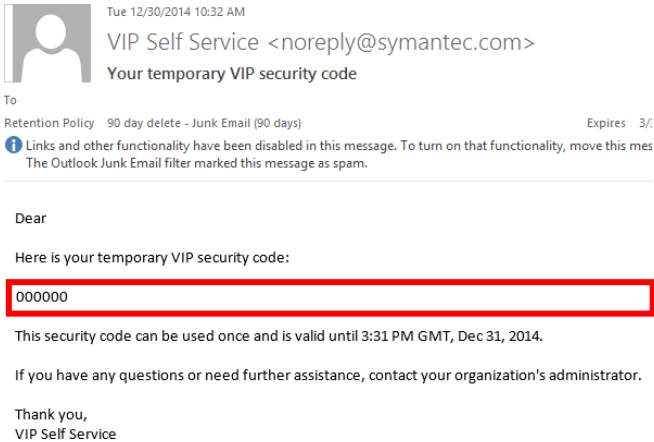
Email Address: Ch\*\*\*\*\*@bshsi.org

Voice Call: 180\*\*\*\*\*19

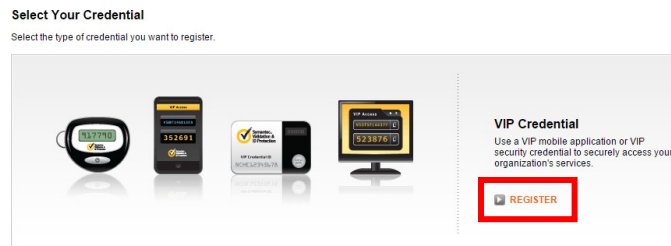
Cancel Continue

3. Check your email for an email from VIP Self Service. This email will contain your temporary VIP security code in the form of a **six-digit number**.

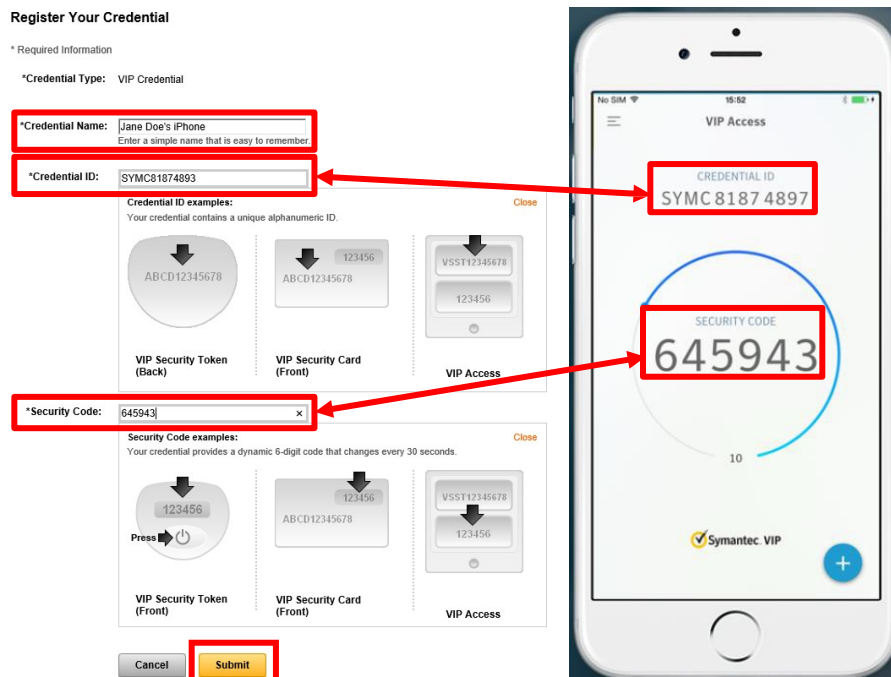
4. In the web browser, enter your temporary **six-digit number** in the **Security Code** box and click **Sign In**.



5. Click Register to register your smart device.



6. Enter a **Credential Name** of your choice. On your smart device, you will see **CREDENTIAL ID** and **SECURITY CODE**. On your computer, enter this information in the **Credential ID** and **Security Code** boxes,



and click **Submit**.

BSMH email addresses that send automated messages:

1. Courion@mercy.com
  - a. If the user had a previous BSMH account, they may end up in a queue that will require extra attention by BSMH teams in order to create their account. The notification will come from this email address if that is the case. (Note that if your new user's account is not created within 7 business days, their request likely has fallen into this queue and will take longer to create).
  - b. Notifications that your users accounts will expire also come from this email address.
2. AccountsAndAccess@BSMHealth.org
  - a. If the user never had access to BSMH resources, the notification of the new account will come from this email address.
3. IT Service Desk bsmhealth@service-now.com
  - a. When access is granted and the work is complete (Carelink, OneContent) notification will come from this email address.
4. Do NOT send email to any of these addresses. They are used for auto-notifications and are not monitored for incoming mail.

Carelink Liaisons' Email addresses

Carelink Liaisons Email		
Market	Physician Offices	Post-Acute
Cincinnati	<a href="mailto:CincinnatiCarelink@mercy.com">CincinnatiCarelink@mercy.com</a>	<a href="mailto:CincinnatiLTCCarelink@mercy.com">CincinnatiLTCCarelink@mercy.com</a>
Lima	<a href="mailto:LimaCarelink@mercy.com">LimaCarelink@mercy.com</a>	<a href="mailto:LimaCarelink@mercy.com">LimaCarelink@mercy.com</a>
Lorain	<a href="mailto:LorainCarelink@mercy.com">LorainCarelink@mercy.com</a>	<a href="mailto:LorainCarelink@mercy.com">LorainCarelink@mercy.com</a>
Springfield	<a href="mailto:SpringfieldCarelink@mercy.com">SpringfieldCarelink@mercy.com</a>	<a href="mailto:SpringfieldCarelink@mercy.com">SpringfieldCarelink@mercy.com</a>
Toledo	<a href="mailto:ToledoCarelink@mercy.com">ToledoCarelink@mercy.com</a>	<a href="mailto:ToledoCarelink@mercy.com">ToledoCarelink@mercy.com</a>
Youngstown	<a href="mailto:YoungstownCarelink@mercy.com">YoungstownCarelink@mercy.com</a>	<a href="mailto:YoungstownCMCarelink@mercy.com">YoungstownCMCarelink@mercy.com</a>
Irvine KY	<a href="mailto:MWCarelink@mercy.com">MWCarelink@mercy.com</a>	<a href="mailto:MWCarelink@mercy.com">MWCarelink@mercy.com</a>
Paducah KY	<a href="mailto:LourdesCarelink@mercy.com">LourdesCarelink@mercy.com</a>	<a href="mailto:LourdesCarelink@mercy.com">LourdesCarelink@mercy.com</a>

[Market List \(as seen when requesting a new account\)](#)

- BSHSI – (for CCLink – do not use for accessing Mercy Hospital Patients)
- CHPO – Lorain Ohio
- CMHP – Springfield Ohio
- CORP – Do Not Use
- HMHP – Youngstown Ohio
- KYIN – Paducah Kentucky
- MDCO – Do Not Use
- MHPN – Toledo Ohio
- SWOH – Cincinnati Ohio
- WCOH – Lima Ohio