# BMC ChartLink Access

BMC ChartLink (often called CareLink) is a web-based portal that allows external, community-based providers and organizations to securely access a hospital or health system's Epic electronic health record (EHR) for shared patients.

Having access to ChartLink will allow you to: view patient information such as clinical notes, lab results, imaging, discharge summaries and details for patients referred to or treated at BMC. This access will also allow you to place and track referrals and imaging orders.

This tip sheet walks you through how to gain access to ChartLink as a site administrator and add additional users for your organization

To create a new site/organization and site administrator account:

1. Browse to the Chartlink webpage (chartlink.bmc.org)
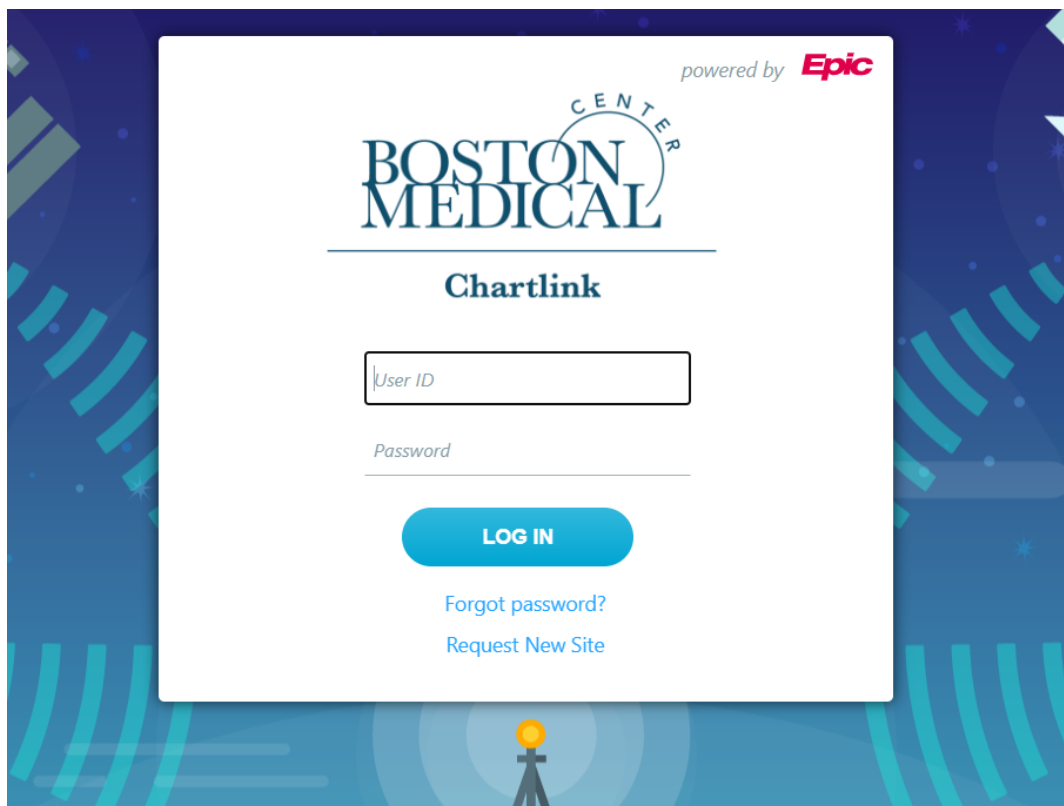
2. Click on **Request New Site (or account)**

3. Click on **Site**

4. Fill in all the required information about your site (or organization)

5. Add the signed "Health Information Data Access Management" agreement using the attach button and uploading it from.

6. Once the agreement is uploaded hit the **NEXT** button to proceed. We cannot implement a new Chartlink site without a signed agreement.

7. Choose the type of user that your site admin will use. If your intention of using ChartLink is to submit referrals for specialty or orders for imaging or other types of granted scheduling (e.g. OR cases) you would select **Ordering User.** If you intend to only view patient encouragers and records, then you would select **Read Only User**

8. Add in all the required fields for your site administrator

9. Complete and attach the **NDA Agreement**, as the site administrator you will sign the "Signature of Off-Site Designee Approving Access" line. If you are the site administrator, make sure the "**Make this user a site administrator**" box is checked and press **NEXT.**

Other

Complete the required items and upload the NDA Agreement

⬤ Attachments:

Add files

10.0 MB Total Allowed   0 Files ⓘ

Comments:

Site Administrator

A site administrator is the person responsible for maintaining a site's records. These responsibilities include verifying that user accounts are current, deactivating the accounts of users who are no longer active at the site, and submitting requests to activate new user accounts. Every site must have at least one administrator.

☑ Make this user a site administrator

✔ Accept   ✗ Cancel

10. Review user you created and then hit **Verification** button.

1. Site Information **2. Users** 3. Verification

Users

➕ Add   ✏ Edit   ➖ Delete

Name	User Type	NPI	Email	Site Administrator
○ Mouse, Minnie	Clinical Staff		Minnie.Mouse@ssymca.com	Yes

← Site Information   → Verification   ✗ Cancel Request

11. Click the **captcha** and add the **Requested By** name

1. Site Information   2. Users   **3. Verification**

Verification

⬤ Verification:

☐ I'm not a robot

reCAPTCHA
Privacy - Terms

⬤ Requested by:

12. Submit request

13. Take note of your reference id for future use

New Account Request ▶ Confirmation

Reference #: 21586

Thank you for Submitting Your BMC Chartlink Account Request

Please place this page or record the Reference# above as your confirmation. Our staff will review your information and may contact yo
have your Reference # ready.

What to Do Next?
- If you're requesting a brand new site, you'll receive further instructions by mail or email.
- If you're joining an existing site, you'll receive your access information by mail or from your site administrator.
- If you're adding a user to your existing site, you'll receive instructions in an In Basket message.
- New users will be prompted to change their password the first time they log on.

Additional Information
If you have questions you can email DG-ChartLink@bmc.org or call the BMC Helpdesk @167-414-4500

When you have completed these steps, an administrator at BMC will approve of your site creation and user account and will send you an email confirming your account is activated.

Upon logging into Chartlink if you find that there is something that you need to complete your assigned workflow (ie. Case Entry/Order Entry, scheduling access) please contact the Chartlink group or call the BMC Service Desk to enter a ticket.

Once activated the site administrator will be able add additional users to your site/organization by going into the **My Groups** on the Chartlink homepage:

Welcome to BMC ChartLink, *powered by Epic.*

BOSTON MEDICAL CENTER
Chartlink

| Select Patient | Open Chart Review | Place Order | My Groups |

☑ **Unread Messages**

ED Notifications (2115)
Inpatient Notifications (1451)
MyChart Advice (2)
MyChart Rx Request (20)
New Account Request (19)
Outpatient Notifications (57289)
Patient Questionnaires (2)
Pt Activation Code Request (83)
Result Notifications (5086)
Rx Response (2)

★ **Quick Links**

How to Get Started
ChartLink Basics
FAQs
First Access Pilot Tip Sheet
uPerform

In **My Groups** you will see several tabs, but the only ones you will need to be concerned with are "*My Groups", "Account Requests" and "Site Verification"*:

| My Groups | Account Requests | Site Verification |

☆ My Groups

Within the *My Groups* tab you will see all the users associated to your group:


For each user, you will see three icons on the right side of the screen:

Each of these icons controls a different function that you can manage for your users:

- The Blue Key - icon will allow you to reset your user's passwords.
- The White Key with the Blue Arrow Icon will reset the user's 2FA enrollment. This is necessary from time to time.
- The Red hyphen icon allows you to deactivate the user. This should be done when a user is no longer with you, and part of your site verification process.

In the *Account Requests* tab, you will be able to request access for users that don't yet have access to Chartlink:
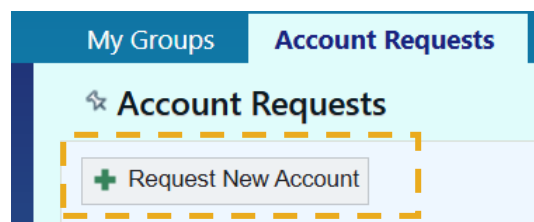
Upon pressing the Request New Account Button, you will be brought to the same screen that you filed out previously when requesting site administrator, and from there the process is the same.

When the user is created by the Admin on the BMC side, you will be prompted to assign a temporary password:

The user will receive an email from Epic when their username is generated, but you should let them know what you have set as their temporary password.