

Security External Forms Application

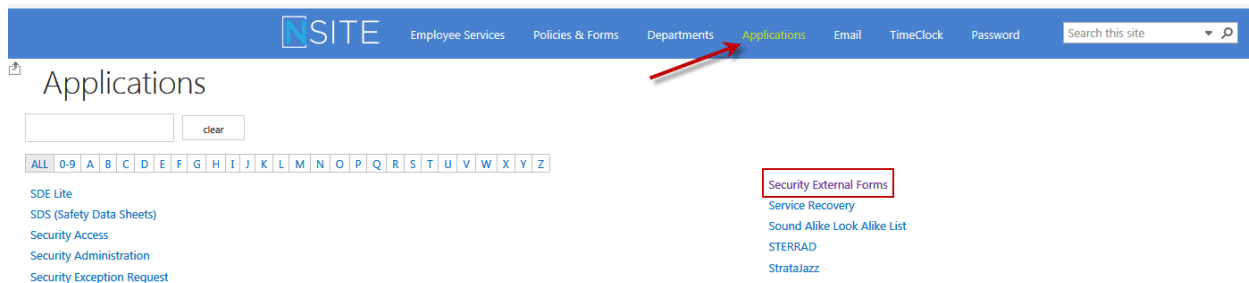
EpicLink-Internal Coordinator Workflow

Coordinators

Accessing Application

The Security External Forms application is a single destination to access many external security forms for Norton Healthcare. The EpicLink request form is the first one under this new application.

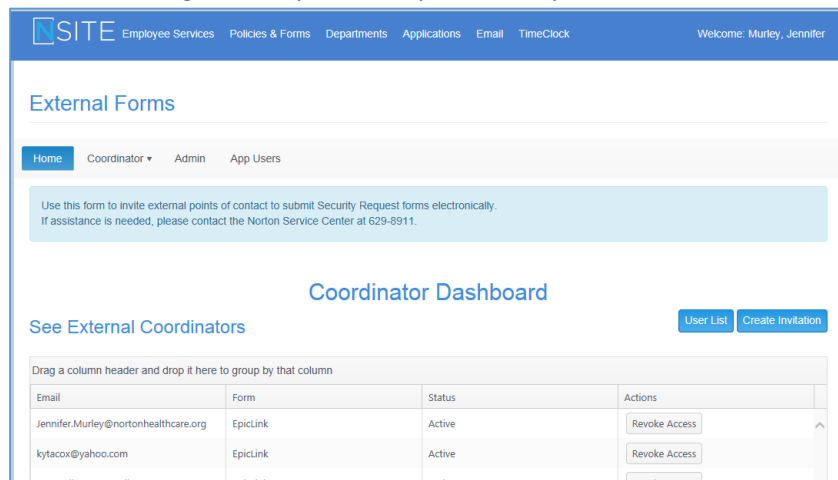
To access the application, choose “Security External Forms” from the Applications tab in NSite



This Dashboard shows the External Coordinators that you have invited. Buttons provide quick access to invite other External Coordinators, Revoke Access for the Coordinators, and access the list of Users you have invited.

The “Coordinator” menu at the top of the screen provides another option for viewing the information:

- **EpicLink – Invite External Coordinator**: invite someone to become an External Coordinator (aka Non-Norton Point of Contact). This allows them to start EpicLink user requests for their associates.
- **EpicLink – Invite User**: start the process for a single user to get access to EpicLink
- **External Coordinator List**: see the list of External Coordinator that you have invited
- **Users List**: see the list of single user EpicLink requests that you have started



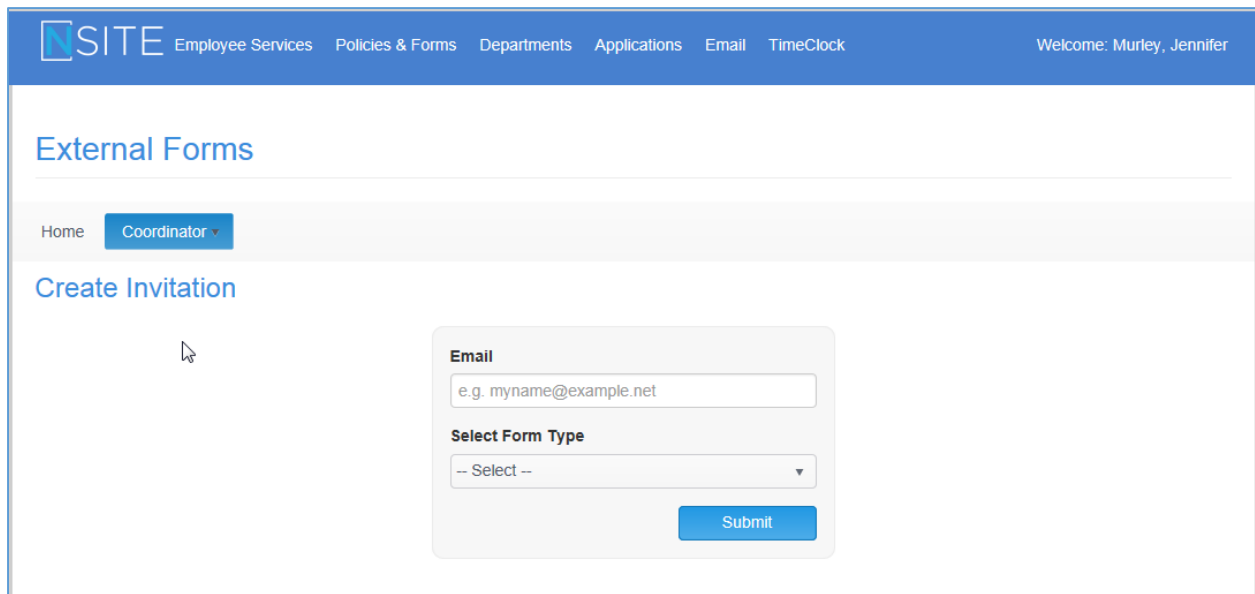
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Send Invitation to External Coordinator

Most organizations will have a point of contact assigned to manage their associates' access requests for EpicLink. After creating the account for application access, he/she will be able to send EpicLink request invitations to users within their organization for the Norton Security team to fulfill, pending approval.

From the dashboard click "Send Invitation" or from the top menu, click "EpicLink – Invite External Coordinator" to bring up the Create Invitation screen.



The screenshot shows the 'Create Invitation' form within the SITE Employee Services application. The top navigation bar includes 'SITE Employee Services Policies & Forms Departments Applications Email TimeClock' and a user greeting 'Welcome: Murley, Jennifer'. The main content area is titled 'External Forms' and has a breadcrumb trail 'Home > Coordinator'. The form itself is titled 'Create Invitation' and contains the following fields:

- Email:** A text input field with the placeholder text 'e.g. myname@example.net'.
- Select Form Type:** A dropdown menu currently showing '-- Select --'.
- Submit:** A blue button labeled 'Submit'.

1. Enter the email address of the External Coordinator
2. Select "EpicLink" from the Select Form Type drop down
3. Click Submit

Once this is submitted, the External Coordinator will receive an email inviting them to set up an account.

Creating this account will not create a request for EpicLink access.

If the external coordinator will also need EpicLink access, you will need to begin the process by using the EpicLink – Invite User link (see below).

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[View List of your External Coordinators](#)

To see a list of external coordinators you have invited, click the Coordinator button and select “External Coordinator List”.

If they no longer need access to send EpicLink user invitations, you can Revoke Access by clicking the button at the end of their row.

The screenshot displays the 'External Forms' application interface. At the top, there is a navigation bar with 'Home', 'Coordinator', 'Admin', and 'App Users'. The main heading is 'Coordinator Dashboard'. Below this, there are two buttons: 'User List' and 'Create Invitation'. A table is shown with the following data:

Drag a column header and drop it here to group by that column			
Email	Form	Status	Actions
Jennifer.Murley@nortonhealthcare.org	EpicLink	Active	Revoke Access
kytacox@yahoo.com	EpicLink	Active	Revoke Access
staceyallen03@gmail.com	EpicLink	Active	Revoke Access

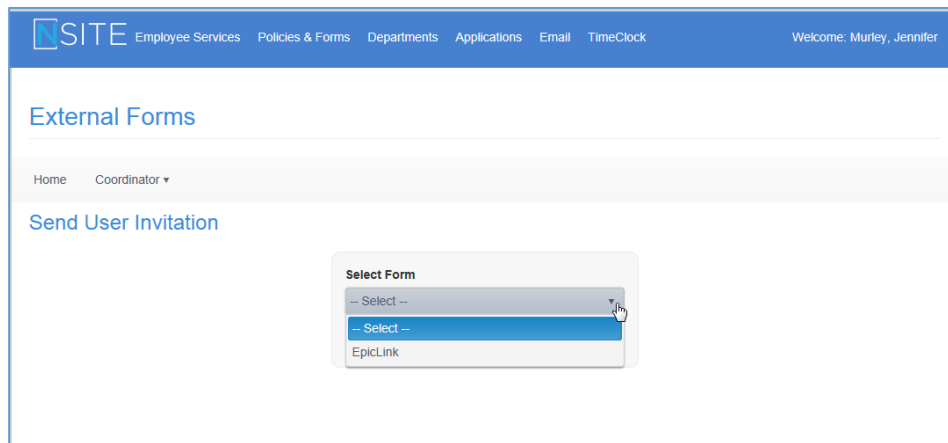
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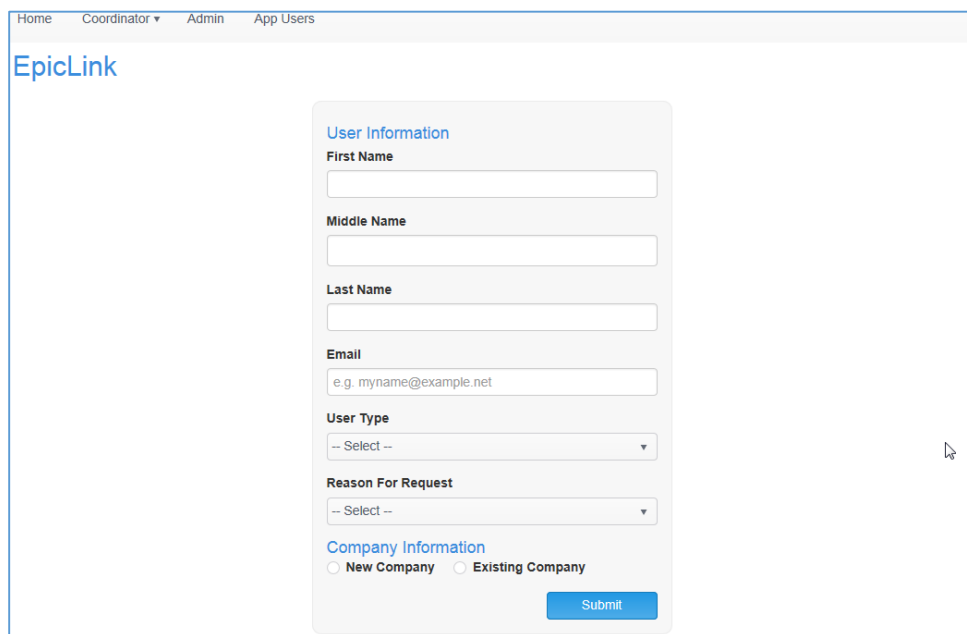
Send User Invitation

Some organizations only need a small number of users to receive EpicLink access. Rather than going through the process of creating an account for the External Coordinator, you can invite them directly.

From the top menu click “EpicLink – Invite User” to bring up the Send User Invitation screen.



1. If it's not already selected, choose EpicLink from the dropdown
2. Click the Create button



3. Enter the user's First Name, Middle Name (optional), Last Name, and email address where the invitation will be sent
4. From the User Type dropdown, select the type of EpicLink user that most closely matches the user's role. The options are: Provider, Clinical Staff, Non Clinical Staff, Research Monitor, Release of Information, and Case Management.

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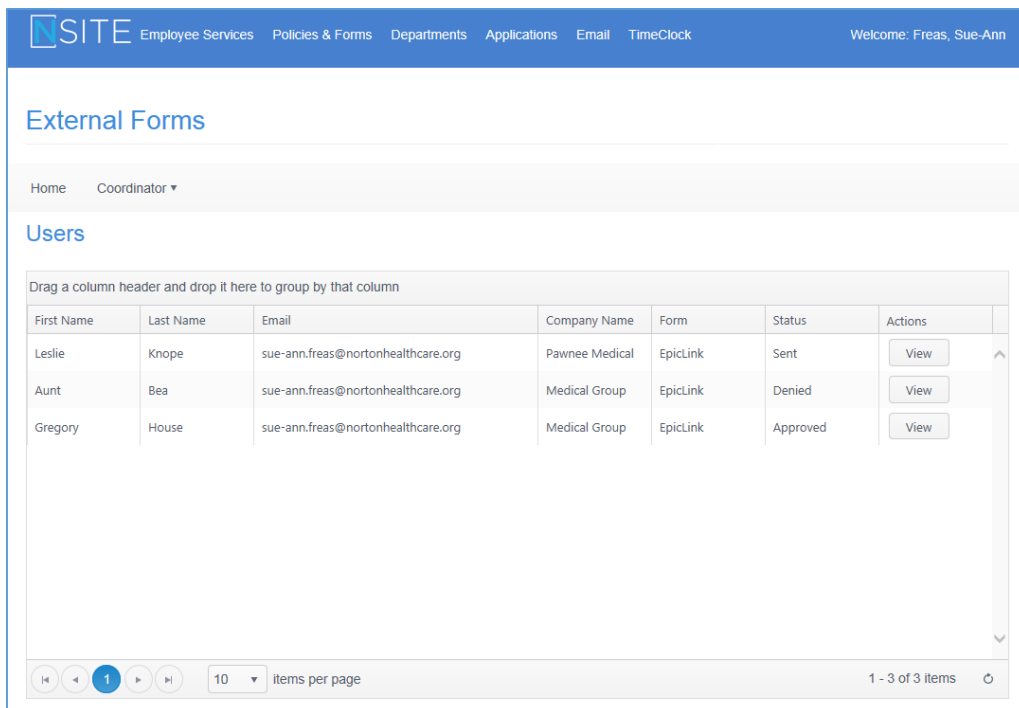
5. From the Reason for Request dropdown, select the type of work that most closely matches what type of responsibilities he or she has for their organization. The options are: Case Management, Continuity of patient's medical care, Medical billing/collections, Release of Information, and Research.
6. For Company Information choose "New Company" if this is the first request for this organization. Otherwise choose "Existing Company" to have the organization name and address completed.
7. If "New Company" is selected, the name and all address fields are required
8. If "Existing Company" is selected, choose the matching company from the drop down to automatically have the organization information added to the request.
9. Click Submit

Upon submission, an email will be sent to the user with a link to complete additional details needed for creation of the EpicLink account. The form will be routed to the Approvers for review before continuing on to the Security team for set up.

[View List of your User Invitations](#)

You can check the status of any user invitations that you have sent. If a user request has been denied, you can find that, too.

From the dashboard or from the top menu select "Users List" to bring up the list of users you've sent an EpicLink access request form.



The screenshot shows the 'External Forms' section of the SITE application. The top navigation bar includes 'Employee Services', 'Policies & Forms', 'Departments', 'Applications', 'Email', and 'TimeClock'. The user is logged in as 'Freas, Sue-Ann'. The main content area is titled 'External Forms' and shows a breadcrumb trail 'Home > Coordinator'. Below this is a 'Users' section with a table of user invitations. The table has columns for First Name, Last Name, Email, Company Name, Form, Status, and Actions. There are three rows of data. At the bottom, there is a pagination control showing '10 Items per page' and '1 - 3 of 3 items'.

First Name	Last Name	Email	Company Name	Form	Status	Actions
Leslie	Knope	sue-ann.freas@nortonhealthcare.org	Pawnee Medical	EpicLink	Sent	<button>View</button>
Aunt	Bea	sue-ann.freas@nortonhealthcare.org	Medical Group	EpicLink	Denied	<button>View</button>
Gregory	House	sue-ann.freas@nortonhealthcare.org	Medical Group	EpicLink	Approved	<button>View</button>

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To view the contents of a given request, click the View button. By default, this view is sorted so the most recent item is on top. You can change the sort order by clicking on that column header.

Possible statuses of User Invitations are:

- *Sent* – the Coordinator has filled out the 1st part; an email has been sent to the user for the 2nd part
- *Signed* – the User has filled out the 2nd part; the Approver has the information they need to Approve or Deny
- *Approved* – the Approver has approved the request and sent it on for the Security team to provision
- *Denied* – the Approver has found an issue with the request. You can see the reason for denial by clicking the View button for that User. If they need to correct something and resubmit, they will need to a new invitation sent to them so they can complete a new form.

Note: The External Coordinator has a similar view available for users they have invited so they can track the statuses of those invitations.