Mayo Clinic CareLink

Quick Start Guide

August 16, 2022

Mayo Clinic CareLink Quick Start Guide

Getting Started

Mayo Clinic CareLink is a tool that provides real-time web access to patient information so you can access patients' clinical data and communicate with Mayo Clinic to provide quality patient care. You can also use Mayo Clinic CareLink to quickly refer patients to our organization. Mayo Clinic CareLink 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 Mayo Clinic CareLink. 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 Mayo Clinic CareLink. Terms that appear in *italics* throughout the guide are further defined in the glossary at the end of the guide.

!	Mayo Clinic provides different levels of access based on how you will interact with us via Mayo Clinic CareLink. Therefore, there may be features discussed in this guide that you do not have access to.

Help and contact information

For help using an activity, click ? on the webpage.

- If you forget your password or cannot log in, you can use the **Need Help Logging In?** link on the sign in page.
- For all other issues, call us at 833-629-0157, email us at carelinkservices@mayo.edu or send us an In Basket Customer Service message.

Browser, system, and connection requirements

For the best performance, use one of the following Internet browsers to access CareLink:

- Google Chrome 50 and any later versions
- Microsoft Edge version 79 or later

You must also use the Windows or Macintosh operating system. Chromebooks are not supported.

Mayo Clinic CareLink 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.

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

How do I log in?

1. Open your web browser and access the following URL: https://carelink.mayoclinic.org or find us at MayoClinic.org > For Medical Professionals > CareLink Online Referrals
2. Enter the user name and password that you received when you registered for Mayo Clinic CareLink and click **Login**.
3. If a Terms and Conditions page appears, read the agreement and click **Accept** to acknowledge your agreement with the terms.
4. If you are presented with the Department field, click the magnifying glass to select the appropriate department and click **Accept**.
5. You are now logged in to Mayo Clinic CareLink.

.

Navigating in Mayo Clinic CareLink

When you log in to Mayo Clinic CareLink, two sets of navigation tools appear at the top of the page.

- **Action Options**: Use these buttons, located at the top of the screen, to perform basic tasks such as selecting your In Basket or logging out.
- **Navigation Buttons**: Use these buttons to open different activities in Mayo Clinic CareLink.

Most activities are also located on the **Menu** tab on the far right. For certain activities, when you select the menu button, if you have not already selected a patient, you will be prompted to do so.

How do I log out?

To maintain patient confidentiality, you need to log out when you are done working or have to leave the computer for any reason. Click **Log Out** to log out of Mayo Clinic CareLink. The next time you log in, you are directed to your home page.

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 for your patient based on name, gender, and date of birth. 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 them. You can access your patient list from the **Patient List** activity or the **Patient Search** activity.

1. Select the **Patient List** tab. Use the tabs at the top of the activity to select the patient list you want to view.
    a. 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 **Patient List** and select the tab for admitted patients. For patients to appear on this list, you must be on the patient’s care team in our system.
    a. Select a patient's name to view additional patient-specific information in the report pane at the bottom of the page.
    b. If you view a report frequently, click 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.
    c. Click to open a patient's chart.

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 **Patient**. The Patient Search activity opens.
2. Enter the patient's name or 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 cannot find a patient?

If you cannot find a patient using the methods above, you might not have been granted access to their chart yet, or they 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 or to submit an order. Note that you must enter the patient's first and last name and enter the birth date in the mm/dd/yyyy sequence 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. Enter any additional comments and click **Accept**.

Note that not all patient records can be accessed via Mayo Clinic CareLink. If you know your search information is correct and you receive a message that the search criteria returned no patients, please contact us at 507-284-4594 for more information.

If the patient's record does not exist, you can create one in Mayo Clinic CareLink by clicking **Create a New Chart** in the Patient Search activity. Note that you may need to use the hashtag (#) at the beginning of your zip code or phone number to bypass formatting requirements for certain countries. *Please do not create test patient accounts for training or testing. These newly created patient records are added to the Mayo Clinic registration database at the time they are created in CareLink.*

In order to view a patient's information via Mayo Clinic CareLink, Mayo Clinic must have a signed authorization form on file for the patient.The Mayo Clinic Authorization and Service Terms form is typically collected at the time of patient registration. However, if you see a *Patient Authorization Required* page displayed, we do not have an authorization on file. This authorization form is linked to the CareLink home page under Quick Links. You can download the form, obtain the patient's signature, and upload or fax it to Mayo Clinic at 507-422-0954.

Monitoring Your Patients

Event Monitor allows you to monitor *events* that occur in your patients' care, such as inpatient admissions or discharges, completion of outpatient visits, or new lab results. You can view these events on the **Home** page in the Unread Messages Dashboard or in your In Basket.

Target your event notifications

To focus on the medical events that matter most to you, use event filters in Event Monitor. You can customize which types of events wish to be notified for. You are associated with an event if you are the attending provider, admitting provider, referring provider, a treatment team member, or a care team member.

1. Access the Event Settings page by clicking **Menu** > **Settings > Event Settings**.
2. Customize which types of events you will receive notifications for by selecting the check boxes in the Event Filter section. To receive notifications for an available event type, select the check box next to the Event.

3. Choose who your notifications are sent to by selecting one of the options in the In Basket Settings section:
    a. **Any user in my group**. Your notifications are sent to a group of users at your organization, and any of the users can access the message and mark it as Done, which removes it from the In Baskets of all the users in the group. This option helps reduce the risk of duplicate follow-up and can save time. This is the default setting.
    b. **Only me**. You are the only user who can mark the notifications as Done. Other users might still see and act on the same notifications, but they cannot mark the message as Done. This option helps ensure you see every notification.

View a patient's recent events

Select the **Home** tab. The Unread Messages Dashboard appears on the left side of the page, showing **Unread Messages** for your patients.

If necessary, you can view more information about events by clicking the name of the patient in the Event Monitor dashboard. This takes you to In Basket, where you can view additional information about the event and mark it as Done if you are finished reviewing it.

Open a patient's chart from an event message

Select the In Basket message for the patient's event and click **Select Patient** to access the patient chart.

Reviewing the Patient Chart

	There may be links to studies or reports that are currently not supported in CareLink. To obtain a copy of the study or report, please call Mayo Clinic at 507-284-4594 or submit an ROI request through your CareLink In Basket. From your In Basket, click New Message and Customer Service. Your completed ROI request can be accessed by clicking on the Requests icon in the teal banner on the Home page.

Review the patient's chart before a visit

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

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

Mayo Clinic may consider some encounter information sensitive, and in order to view the visit detail you will be asked to specify a reason and to re-authenticate. In this case, a Break-The-Glass dialog will be displayed. After entering the reason for your access, click the **Authenticate** button. The login page will be displayed where you must re-enter your user name and password and login. At that point you will see the Authenticate button now says Complete. Click **Accept** to view the visit details.

Find information quickly in the patient's chart

You can enter text in the **Search Chart** field to quickly find the information you need. For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as lipid panel results and progress notes that mention cholesterol.

For patients with large charts, it can also 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.

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

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.
4. Click **Line Graph** or **Bar Graph** to create a graph of the selected data.

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. From the Patient chart view, click **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**.

View a patient's allergies

From the Patient chart view click **Allergies**.

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

View a list of the patient's current medical problems

From the Patient chart view click **Problem List.**

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

View a patient's current medications

From the Patient chart view click **Medications**.

ⓘ	For more information about a medication, click **Show History** or the **View Details** link.

View a patient's history

From the Patient chart view click **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.

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

View a patient's growth chart

From the Patient chart view click **Growth Chart**. This activity includes growth chart datasets from a variety of sources, including the Center for Disease Control and Prevention (CDC) and the World Health Organization (WHO). Datasets are available for children who are developing normally as well as for children who are part of special populations, such as premature infants and girls with Turner syndrome.

View a patient's demographics

Select the **Menu** tab and **Demographics**. A report appears with demographic information like the patient's address, email address, emergency contacts, and more.

Placing Orders

You can use Mayo Clinic CareLink to place orders for referrals, laboratory, and imaging tests.

Place a new order

1. From the **Home** screen, select **Place an Order.**
2. Select or create the patient chart. *If patient demographics appear on a different patient, clear this from your order by clicking **"x"** on the Patient icon on the top row. This will return you to the Home screen where you can select **Place an Order** again.*
3. Your ordering clinic will appear on the left navigation panel under **Access From**.

4. Select the authorizing provider from the drop down list and click **Accept**.
5. Click **Preference List** to see a list of available orders for your organization.
6. Select the check box next to each order that you want to place. These orders appear under Selected Orders on the right side of the page.

    - Use the subsections in the left pane to filter orders by type.

7. Click **Accept Orders**.
8. Your order appears under **Unsigned new orders**. You will note that each order has a required symbol indicating you need to open and complete the order prior to signing. If there's a *required* () or *recommended* () icon next within the *order*, you can enter more information.

    a. **Referral Order**
        i. Review th**e Submit a Referral** guide, stored under the Training and Support link from the Home page. This document gives step-by-step instructions to associate your diagnosis, upload documents and images, and complete your referral order.
    b. **Lab and Radiology Order**
        i. **Associate** the patient's **diagnosis** by
            - Entering the ICD-10 code in the free text field box and clicking the magnifying glass to search.
            - Entering a keyword in the free text fox and clicking the magnifying glass to search.
            - Using an existing diagnoses in the table (if the patient is known to Mayo Clinic). You can enter multiple diagnoses.
        ii. Toggle to a different **Region** by pressing the magnifying glass in the Mayo Clinic location field. See the Training and Support page for a map of the four Mayo Clinic Health System regions.
        iii. Enter additional **Comments** about your order in the Comments field.
        iv. Select **Accept.**
        v. You may then **Sign Orders** to submit to Mayo Clinic. Mayo Clinic will contact the patient to schedule the appointment.

Results will be delivered through the portal for most providers. If In Basket communication is not available, Mayo Clinic will fax your results to you.

Mayo Clinic will not process laboratory or imaging orders **with** a referral order.

Canceling a signed order

1. Select the **Menu** tab and click **Order Review**.
2. Select and cancel the order.
3. Enter a reason for canceling and click **Accept**.
Note: *Some orders cannot be canceled through CareLink. Please contact Mayo Clinic by In Basket message or call us at 833-629-0157 to cancel.*

Sending Additional Records After an order has been signed/submitted

1. From your CareLink In Basket, click the down arrow next to **New Message** and select **Medical Record Upload**.
    a. Verify the Upload is being sent on the correct patient. You may need to click **Change Patient** to select another patient from your Patient List.

b. Complete the free text field **Message for Reviewer**. Indicate the Order type previously submitted and any additional information that would be helpful for the Mayo Clinic scheduler to triage your uploaded material.
c. Click **Add Files** to browse, select, and upload your prepared file.
d. Click **Submit for Review** to send the files to Mayo Clinic.

Sending Additional Images After an order has been signed/submitted

1. Send a Community Message to **P ARZ CAO LINK RPS** for the Arizona campus, **P FLA CAO LINK RPS** for the Florida campus, **P RST CAO LINK RPS** for the Rochester campus, or **P MCHS WI CAO RPS** for the MCHS Wisconsin region, indicating that you have additional images to send to Mayo Clinic. We will message you back, indicating the upload functionality has been enabled with your original order.
   a. Click **Patient List** to select the patient.
   b. Click **Menu** and **Order Review**
   c. Click the **order** under the **Order Name** column
   d. Under **External Media**, click **Upload media for this request**. Follow the steps in the **Quick Reference Guide for Referrals.**

Viewing Upcoming Appointments

Use the **Action Button** on the top row to view **Upcoming Appointments** activities for all patients on your patient list. You can also view upcoming appointments for a specific patient by selecting that patient from your patient list and clicking **Menu** > **Upcoming Appointments.**

The reports sort appointments by patients in a particular patient group, if applicable, and then by date and time. You can collapse or expand the sections by date to avoid printing or viewing the entire report.

Canceled or rescheduled appointments appear at the bottom of the report with the time in strikethrough font.

In Basket: Viewing Messages

As you interact with Mayo Clinic, it is important to have a streamlined system of communication. In Basket is a quick and easy way to communicate with us. From here, you can view and sort messages, search for messages based on a number of criteria, and respond to your messages. You may receive an email notification if you have unread In Basket messages.

Select the **In Basket** tab to access your messages. Folders that group types of messages appear in the left pane. 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. In an effort to keep your In Basket streamlined and manageable, Inpatient Notifications and ED Notifications will purge from your In Basket 60 days after delivery.

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

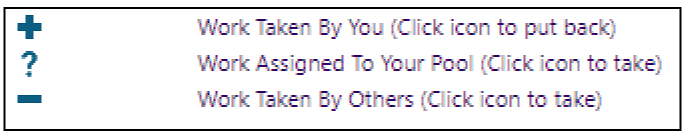
1. Click **Search** in the toolbar.

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.

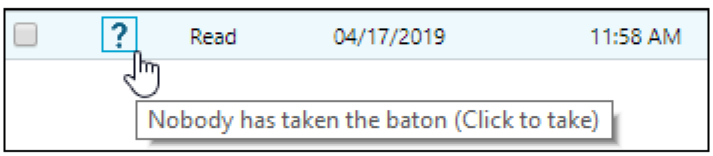
Take responsibility for a message—Pass the baton

When an In Basket message is sent to a pool of users, it is important for everyone to know who is working on any follow-ups. If you would like to alert others in your message pool that you are taking responsibility for a message, use the key below to take or return the message (take or return the baton). If a user tries to take the baton from someone else, they see a message that indicates who currently has the baton and need to confirm that they want to take it.

This functionality is available for all messages sent to a pool.



The legend for baton passing icons



An example of a message that a community user is about to take the baton for

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. Hovering over this icon displays “Print this Page.”
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 can be addressed to individual recipients but may be routed to a Mayo Clinic provider’s support staff for processing. 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.
   a. Customer Service Message: Select the appropriate **Topic.** After you select a topic, the form will refresh to display the appropriate fields for that topic.
      i. **Report a problem**: Use this topic to report a problem you may be having while using Mayo Clinic CareLink. If you are encountering an error or unexpected behavior, please include a screenshot.

        ii. **ROI Request:** Use this topic to submit a Release of Information request for a patient. The completed request will be delivered to your CareLink account, usually within 7 business days.
        iii. **Authorization Upload:** Use this topic to send Mayo Clinic a signed patient authorization form.
    b. **Community Message** Use this message type to send a general message to Mayo Clinic.
        i. To send a message in the To field, type **P ARZ CAO LINK RPS** for the Arizona campus, **P FLA CAO LINK RPS** for the Florida campus, or **P RST CAO LINK RPS** for the Rochester campus, <u>or</u> type the Mayo Clinic recipient's last name and click the magnifying glass to search/select your recipient.
        ii. Enter a brief subject in the **Subject** field.
        iii. 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 name to the message.
        iv. Complete any other required fields.
        v. Type your message in the Note field.
    c. Medical Record Upload: [Use this function]() if you have additional medical records to upload <u>after</u> your order has been place in CareLink.

3. 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 reply to all, click the down arrow next to Reply and select **Reply All**.
- To forward a message, click **Forward**.

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

View messages you have 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.

Take action on a message

Some messages may require you to take action. *Service Requests* (discharge placement) messages will need to be accepted or declined to notify case managers. *Cosign – Clinic Orders* messages allow you to sign or decline the order. To complete this process, open a message and click the appropriate button.

In Basket: Attaching to Another User's In Basket

A CareLink user at your organization can give another user access to "attach" to their In Basket. This allows the In Basket **user** to manage the **owner's** In Basket messages. This might be especially helpful to manage the referral correspondence (packet) that is sent electronically to the referring provider through a CareLink In Basket message. Note: Notifications for new activity (and email ticklers) will continue to be delivered to the In Basket **owner.**

In Basket **<u>owner</u>** needs to log into CareLink and **grant access** to the **<u>user</u>**.

1. From CareLink, In Basket **owner** clicks on **In Basket > Attach > Grant Access** tab

2. Search for **user** name in the **Grant Access to field** (last name, first name).
3. Click the **magnifying glass** to search, **select** the user name.
4. **Repeat** until all users are added.
5. Click **Save.**

In Basket **user(s)** needs to **attach** to the owner's In Basket**.**

1. From CareLink, In Basket **user** clicks on **In Basket** > **Attach**.
2. In the Attach tab, enter In Basket owner's name (last name, first name) in the input field that applies and click the magnifying glass to search.
    a. Persistent attachments: Access to owner's In Basket until revoked by owner.
    b. Out of Contact/Temporary field: Access to owner's In Basket until you log out.
3. Select the checkbox next to the In Basket owner's name
4. Click **Save**.
5. Click **Back to In Basket.**

To view another user's In Basket after Attaching

1. From your In Basket, view the additional In Basket near the bottom of the left navigation panel under **Attached In Basket.**
2. Toggle back to your In Basket by clicking **My In Basket**.

In Basket: Release of Information

The Release of Information (ROI) activity provides CareLink users with paperless releases of information when the information is not found using Chart Review. When complete, the release is delivered securely through CareLink In Basket Requests activity.

Submitting a Release of Information Request

1. Click the arrow next to **New Msg** and select the **Customer Service** message type.
2. Select **ROI Request** topic.
3. **Complete the form** (select the magnifying glass to view selections within that field)
    a. The turnround time of your request will be improved with the patient selected.
4. CareLink will generate a **confirmation message** and **email notification** when the request has been received. Allow up to 7 business days for the request to be fulfilled.

Note: View the status of a submitted request by clicking the **Submitted CRM** icon in the toolbar on the Home screen.

Viewing a Completed Release of Information Request

1. Mayo Clinic will notify you by **In Basket message** and **email notification** when the request has been completed.
2. View your completed request by clicking **Requests icon** from the toolbar.
3. **Select your completed request** to view.
4. Click the **print icon** on the toolbar to download the ROI Request.

Viewing Reports

Order Status Report

An order status report is available to monitor the status of the orders placed at Mayo Clinic for your organization. This report refreshes overnight.

From the Home screen, click Reports. The output of this report includes all orders placed that are completed in the last 7 days or in process.

Order Volume Report

The site administrator for your organization has access to month-to-date and year-to-date volume reports.

Managing Your Clinic (Site Administrator)

The site administrator for your organization has responsibility to maintain your organization's CareLink user roster through Manage My Clinic. The site administrator has access to request new accounts and deactivate existing accounts when access is no longer needed. The site administrator is also responsible to complete the Site Verification activity on an annual basis.

Deactivate a User

1. Click **Manage My Clinic** from the Home screen**.**
2. From the **My Groups** tab, Select the red minus sign to deactivate the user.
3. If you are deactiving a **Provider** user, leave the default setting under "What to Remove" set to **Both**.
4. Enter a comment to indicate why you are deactivating the user and click **Deactivate**.

Verify User Records

During the login process you might receive a Site Verification message from Mayo Clinic asking you to verify that all users working at your site are current and active. You can click on the link in the message to **Verify Now** or you can bypass site verification by clicking **Verify Later**. Bypassing the message will silence the message until your next login. Alternatively, once logged in, you can complete site verification by clicking **Manage My Clinic**. From the **Site Verification** tab, you can verify that all the users working at your site are current, and you can deactivate user records to prevent unauthorized access by users whose accounts are outdated.

1. In the **Active** column on the **Site Verification** tab, select No for all the users whose accounts you want to deactivate. You can enter a comment in the Comments field that appears.
2. Select the **Acknowledge & Verify** box to acknowledge that you have reviewed and confirmed the list of users.

Best Practice when completing the site verification process:

- Allow enough time to review all of your users and complete the process in one session. You cannot save your changes when partially through the process.
- CareLink times out in two hours. If you begin the site verification process, leave the CareLink application, and do not return for two hours, your session will time out and your changes will not be saved.
- If you aren't responsible for your entire user list, it might be helpful to collaborate with other site administrators or responsible staff at your organization first. You can review and update the users you are responsible for first in **Manage My Clinic** > **My Groups** tab. After the entire user review is complete in the **My Groups** tab, a site administrator can easily and quickly complete the site verification process.
- If you have multiple site administrators at your organization, the site verification prompt at login will no longer appear once <u>any</u> site administrator completes the site verification process for your organization.

- If you are a site administrator for more than one organization, you can complete the verification process for one organization and return later to complete the process for an additional organization.

Request a new user in Mayo Clinic CareLink

1. Click **Manage My Clinic**.
2. Select the **Account Requests** tab and click ✚ **Request New Account**.
3. Choose the type of account you want to create.
4. Enter the user's demographic information.
5. In the User group field, select the user group to which the user should belong.
6. Enter a comment about your request, if necessary, and click ✔Submit Request.
7. After your request has been processed, the new user will receive a CareLink invitatation via email with instructions to create a username and password.
   Please allow three to five business days for Mayo Clinic to process your request.

ⓘ	You can see the status of user requests that have been submitted in the Status column on the **Requests** tab.

User Settings

You can use the Mayo Clinic CareLink setting options to perform maintenance tasks such as setting the page that appears when you first log in and determining your default patient selection method.

Update your Demographics and Email preferences

1. Click **Menu** and then click **Settings**.
2. In the **My Demographics** section, update your email address, title, degree, and specialties, if applicable. The fields that appear depend on your user role.
3. In the **Receive e-mail notifications** field, indicate whether you want to receive notifications for unread In Basket messages at your specified 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 **Receive notifications for group events** field:
    a. Select **Yes** to receive email notifications about all patient events for the provider groups you belong to.
    b. Select **No** to only receive email notifications about patients you specifically have access to.
6. Click ✔**Save**.

Change your default page

Use the Set Default Page utility to determine which page you see first when you log in to Mayo Clinic CareLink. 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. Click **Menu,** click **Settings,** and click **Set Default Page**.
2. Navigate to the page that you want to set as your default page.
3. Click **Set Default Page** at the top of the application to set the current page as your default page.

ⓘ	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**.

Mayo Clinic CareLink Glossary

Activity

Any web page that corresponds to a specific task, such as selecting a patient, reviewing a patient's results, or creating a referral. There are several different activities in Mayo Clinic CareLink, and the activities that you use depend on the tasks that you want to complete. Each activity has a name in Mayo Clinic CareLink, such as Results Review, that helps you determine the activity's purpose.

Encounter

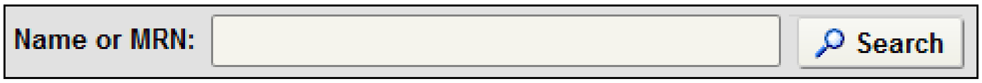
One visit with a provider. This might include a visit type such as an inpatient stay, an office visit, or a telephone call from a patient. Encounters appear in Chart Review. When you view an encounter, you can see all of the information associated with that specific visit, including the patient's vital signs, progress notes, procedures and medications ordered during the visit, and more. Encounters are classified by date, type, and provider.

Event

A clinically relevant business event that occurs for a patient. Events are recorded in the system at several points in a patient flow. For example, events are triggered when a patient schedules an appointment, is admitted to the hospital, cancels an appointment, has new results, etc. The urgency of events can vary. For example, a scheduled appointment for a physical might not be as urgent as an admission to the hospital.

Field

Any place in Mayo Clinic CareLink where you can enter information. Each field has a prompt to indicate the type of information you should enter, such as **Name** or **MRN**.



Search All Patients

A tool that you can use to open the record for a patient with whom you do not have an established relationship. This tool might be useful in case of emergencies or at other times when you might need to access a patient's record before you've been granted access. From the **Search All Patients** section of the Patient Search activity, you are prompted to enter specific pieces of information about the patient before you can gain access to the record.

Link

Text that you can click to access a different web page. Links appear in several places in Mayo Clinic CareLink. When your mouse pointer moves over a link, the pointer typically changes to a hand icon and the text of the link becomes underlined.

Provider

Any person involved in patient care, such as a nurse, the patient's primary care physician, or a referring provider. Patient information in Mayo Clinic CareLink is often associated with a specific provider. For example, procedure orders are associated with the provider who wrote the orders.

Recommended field

Information that is suggested but not required. appears next to recommended fields. You can continue to save or submit information if you do not complete recommended fields.

Required field

Information that you are required to enter. appears next to required fields. You cannot save or submit a form until you complete all required fields.

Time mark

Click **Time Mark** in the Results Review activity to indicate that you have seen the patient's new results. When you do so, the results are no longer considered new to you. The next time you access Results Review for the patient and select the **New Results View** from the View menu, only the results that have been entered since you clicked **Time Mark** appear. New results appear in italic font, and all other results that you indicated that have you seen appear in normal font.