**SFDPH CareLink Quick Start Guide**

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**Getting Started**

SFDPH CareLink is a tool that provides real-time web access to patient information so you can access patients' clinical data and communicate with San Francisco Department of Public Health (SFDPH) to provide quality patient care. You can also use SFDPH CareLink to refer patients to our organization.
SFDPH 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 SFDPH 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 SFDPH CareLink.

Each organization configures Epic differently, so what you see in this guide might differ from what you see in your system.

Help and Contact Information

- For help using an activity, click
- For any troubleshooting, including problems logging in, call the SFDPH Service Desk at (628) 206-7378.

Browser, System, and Connection Requirements

You must use one of the following Internet browsers to access SFDPH CareLink:

- Apple Safari 9 and any later versions
- Google Chrome 50 and any later versions
- Microsoft Internet Explorer 11
- Mozilla Firefox 45 and any later versions

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

SFDPH 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.

How do I log in?

1. Open your web browser and go to https://carelink.sfdph.org.
2. Enter user DPH Active Directory user name and password to login to SFDPH CareLink.
3. Choose an authentication method to receive a code that you need to enter when you log in for extra security. You can choose to receive the codes through a mobile application or an email. Refer to SFDPH CareLink Two-Factor Authentication webpage for further details.
4. Follow the on-screen prompts to set up your chosen authentication method. Refer to SFDPH CareLink Two-Factor Authentication webpage for further details.
5. Select the Department you are associated with.
   a. Search for a department by clicking on the magnifying glass. This will give you a comprehensive list of all the departments available in Epic.
      i. Most SFDPH CareLink department names start with “DPH CareLink XXX [clinic name] ...”.
      ii. If you are a DPH site, your department may start with “DPH XXX [clinic name] ...”.
   b. Once a department is selected, the system will remember the last department you logged into.
6. If a Terms and Conditions page appears, read and acknowledge the agreement.

Refer to SFDPH CareLink Two-Factor Authentication webpage for further details on how to set-up.

SFDPH CareLink Home Page

This is a sample of the Home Screen that appears by default when you first log on. Your home screen may look slightly different based on your user role. You may use this as a quick reference for the buttons that appear. Most of your navigation in SFDPH CareLink will be done through the menu bar at the top of the screen. We go in to detail on that below.
Navigating in SFDPH CareLink

When you log in to SFDPH CareLink, several sets of navigation tools appear at the top of the page.

1. **Navigation Tabs**: Use these tabs to open different activities in SFDPH CareLink. Each tab contains one or more related activities. For example, the Patient tab contains patient-specific activities. When you click a tab, the default activity for that tab opens.

2. **Activity Menu**: Use this menu to open the various activities that are contained in the selected navigation tab. For example, the Patient tab activity menu contains the Allergies and Chart Review activities.
   - If there are more activities than can fit on the screen, hover over the ellipsis on the far right of the menu to see all the activities contained in the tab.
   - You can also click to pin an activity so it appears first in the menu. If you pin multiple activities, they appear in the order that you pinned them. Click and drag pinned activities in the menu to change their order.

3. **Action Options**: Use these buttons, located on the top right of the screen, to see all of your available activities or to log out.

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:

1. Click Log Out. The next time you log in, you are directed to your start page.
2. Secure the computer by going to Menu > Secure. When you log back in, you return to the same activity that you were using before you secured the screen.

How do I change my password?

Your username and password for SFDPH CareLink is the same as your SFDPH Active Directory username and password. If you need to change your DPH Active Directory password, please contact DPH Service Desk at (628) 206-7378.

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Accessing the Patient Chart

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

1. Click Patient and go to the My Patients tab.
If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name.

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

-or-

1. Click Patient List to view.

2. To see only the patients for whom you are the PCP, select your name in the Filter by provider field.

3. Click a patient's name to open the chart.

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

1. Click Patient and enter the patient's name or MRN.

2. In the Search Results window, click the name of the patient whose chart you want to open, and click Select.

What if I can't find a patient?
If you don’t 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. 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.
   - **Required Fields: Name (Last, First), Legal Sex, and DOB.**

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.
   - If you are associated with more than one SFDPH CareLink site, you will be asked to associate the patient with the appropriate site.
Creating a New Chart

If a patient's record does not exist, only certain user roles and sites can create a patient’s chart in SFDPH CareLink by clicking Create a New Chart in the Patient Search activity.

The following user roles can create a patient’s chart:
- Clinic Coordinator
- DPH Users

If you do not have the ability to create a new chart, please contact your site’s Clinic Coordinator.

1. After unsuccessfully searching for a patient, Clinic Coordinators and DPH Users can create a new chart for a patient. Only create a new chart after thoroughly searching if the patient's chart exists in the system.

2. If Search All Patients does not find a match, click on Create a New Chart.

3. Complete the Patient Create form along with the required fields, select the reason you need access to the patient's chart in the Reason field, and add a comment. Click ✅ Create.
Monitoring Your Patients

Event Monitor allows you to monitor events that occur in your patients' care, such as inpatient admissions or discharges, outpatient visits, or new lab results. You can view these events on the home screen or in your In Basket.

Target your event notifications

To focus on the medical events that matter most to you, use event and relationship filters in Event Monitor. You can tailor which types of events you’re notified of and for which patients. For example, you can choose to be notified of only the events associated with you or certain providers in your group. You’re associated with an event if you have an established relationship with the patient, such as a treatment team member, a care team member, or the patient’s PCP.

1. From the Home screen, click on Menu in the upper right corner, and click on Settings.
2. Select Event Settings in the Event Monitor section.
3. Choose which types of events you’ll receive notifications for in the Event Filter section. To receive notifications for all the available event types, select the Events I Will Receive check box.
4. Choose which events you’ll receive notifications for by selecting one of the options in the Relationship Filtering section:
   a. All events for patients in my group. This option includes events for any patient that you have access to. For example, if you choose to receive referral notifications, you are notified of any authorized referrals, even if the referral isn't to you or your group.
   b. Only events associated with a provider, department, or vendor in my group (recommended). For example, if a patient you have access to is admitted to the hospital, and the patient's PCP is in your group, you receive a notification even if the PCP isn't associated with the admission.
   c. Only events associated with me.
   d. Only events associated with certain providers or departments. This option includes only events associated with the providers or departments you select.
5. Choose who your notifications are sent to 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.
   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 can't mark the message as Done. This option helps ensure that you see every notification.

View a patient's recent events

Select the Home tab and hover over each type of event in the Event Monitor section to review recent events for your patients.
If necessary, you can view more information about events and mark them as Done in In Basket by clicking the name of the patient in the Patient column.

For more information on In Basket, refer to Viewing Messages section.

Open a patient’s chart from an event message

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

Reviewing the Patient Chart

Review the patient’s chart before a visit

1. Open the patient's chart, click Chart Review, and select a tab that includes information you want to review.
2. To view more detail, such as a specific patient visit, click the date link that appears in the row.
To view details on several rows at once, select the check boxes in those rows, and then click **Start Review**.

3. To send a message to the patient's PCP regarding an office visit, click **Ask a Question**, fill out the message form, and click **Send Message**.

**Find information quickly in the patient's chart**

For patients with large charts, 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.

**Use filters to narrow the list of information you see**

You can also use filters to find 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** and select a filter type. 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.
3. Click **Apply** to make the results of your search appear.

**View trending data in graph or table format in Chart Review**

1. In Chart Review, select the check box for 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.
   a. Click **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet.
   b. 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 trending lab results in Results Review**

1. Select the **Patient** tab and click **Results Review**.
2. Select the date range for the results data you want to see and click **Accept**.
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. Select the name of the component or component type that you want to view.
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**.

**Click **Time Mark** so the next time you view the patient's results, you can easily distinguish any new results from those that you have already seen.**

**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**
Select the **Patient** tab and click **Allergies**.

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 **Patient** tab and click **Problem List**.

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

**View a patient’s current medications**

Select the **Patient** tab and click **Medications**.

For more information about a medication, click **View Details**.

**View a patient’s history**

Select the **Patient** tab and click **Histories** to see a report 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 demographics**

Select the **Patient** tab and click **Demographics** to see a report with demographic information like the patient's address, PCP, emergency contacts, and more.
Uploading Files to the Patient Chart

Upload a file

You can attach a file to the patient's chart, such as an electronic copy of exam notes.

1. Drag and drop a file from your computer into the section below the patient's photo on the left side of the screen. Alternatively, click Upload document on the left side of the screen to open a window where you can drag and drop the file.
   - If you don't want to drag and drop a file from your computer, click Add file to browse for the file on your computer and select it.
   - The maximum allowed file size appears in a message below the Add file button.
   - To see which types of files you can add, hover over Add file.
2. Categorize the document by selecting the appropriate type and enter a description of the file.
3. If you want to add the file you had uploaded, click on Attach to Patients Chart.
4. If you want to remove a file that you selected, click Attach to Patients Chart.

Writing a Note

Only certain user roles have the ability to write a note within the patient’s medical record.

The following user roles can write a note:

- DPH Users
- Alliance Health Project Users

Write a note
1. Open the patient’s chart, hover over the ellipses and select Notes under Care Management.

![Patient chart interface](image)

2. Click +Add to create a note. A separate window will open. Write and complete your note and click on Sign once complete. The note will be added to the patient’s medical record.

![Note creation window](image)

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**Placing Orders**

**General – Placing a new order**

1. Select the Patient tab and click Order Entry.
2. If you are associated with more than one site or there are multiple authorizing providers at your site, select an ordering clinic and authorizing provider and click Accept.
3. Click Preference List to see a list of available orders.
   - Through SFDPH CareLink, you will be able to order the following:
     - Labs
     - Radiology (Imaging)
     - eConsults/eReferrals (former Rubicon system)
4. Select the check box next to each order that you want to place. Use the subsections in the left pane to filter orders by type.
5. Click Accept Orders to review a list of your orders and make any necessary changes before signing them.
6. If there's a required or recommended icon next to an order, you can enter more information. Click an order's name to edit details like quantity or associated diagnoses.
   - For an eConsult order, you can attach a file, such as a scanned image, to the order.
   - To associate a diagnosis with a single order, either select the check box for a recent diagnosis in the Dx Association section or enter a new diagnosis in the Add a new diagnosis field and press Enter.
7. Accept and sign the orders.
8. If there’s decision support associated with any of the orders, select a follow-up action and click Accept.
If you already know the name of the order in SFDPH CareLink, you can search for it in the **New procedure** field.

Enter a partial word in a field instead of a whole word to reduce the amount of time you spend typing.

For example, entering "gluc" in the **New procedure** field in Order Entry shows you all of the procedures beginning with "gluc." You can use this shortcut for any information that is stored in the database, such as procedures and other providers' names.

**Lab Ordering: In-Clinic Collection**

1. If your site draws, collects, and sends lab specimens to SFDPH labs, please complete the additional steps:
   a. Place lab order(s). Labs that were ordered will appear on the Order Entry screen. Before signing the orders, click on lab order hyperlink under **Unsigned new order** to update the labs to the following:

   i. **Status:** Future
   ii. **Specimen source:** Select the appropriate specimen source
   iii. **Class:** Clinic Collect
   iv. **Resulting Agency:** This should default to the appropriate agency. If blank, update to appropriate agency.

   - **Note:** SAN FRANCISCO DEPT OF PUBLIC HEALTH = Public Health Lab

   v. **Collection Date:** Date lab was drawn
   vi. **Collection Time:** Time lab was drawn
   vii. **Dx Association:** Add appropriate diagnosis

   b. Click **Accept** once fields are completed

   c. Repeat above steps for each lab that was ordered and collected
d. From the Order Entry screen, Sign Orders once all labs have been updated

From the Order Entry screen, click the Printer Icon to print order information from SFDPH CareLink for Clinical Requisition

f. Site completes patient demographics/insurance form on paper
   i. Note: This is the same demographic/insurance form used in the past when sending specimens to SFDPH

g. Draw and label the specimen(s) using your own manually created labels (Note: You do not have the ability to print labels from SFDPH CareLink)
   i. Label should include:
      • Patient Name
      • Patient’s SFDPH MRN
      • Collection Date
      • Collection Time
      • Signed initials of person who collected labs

h. Send labeled lab specimen(s), order entry screen print out, and patient demographic/insurance form to SFDPH Lab for processing via your normal courier process

Lab Ordering: Sending Patients to DPH for Lab Draws

1. If your site sends patients to DPH for lab draws, please complete the additional steps:
   a. Place lab order(s). Labs that were ordered will appear on the Order Entry screen. Before signing the orders, click on lab order hyperlink under Unsigned new order to update the labs to the following:
      i. Status: Future
      ii. Specimen source: Select the appropriate specimen source
      iii. Class: Clinic Collect
      iv. Resulting Agency: This should default to the appropriate agency. If blank, update to appropriate agency.
         • Note: SAN FRANCISCO DEPT OF PUBLIC HEALTH = Public Health Lab
      v. Dx Association: Add appropriate diagnosis
   b. Click Accept once fields are completed
   c. Repeat above steps for each lab that was ordered
   d. From the Order Entry screen, Sign Orders once all labs have been updated
   e. From the Order Entry screen, click the Printer Icon to print order information from SFDPH CareLink for Clinical Requisition
   f. Send patient with Order Entry Screen print out to DPH for lab draw

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Radiology (Imaging) Ordering

1. If your site sends patients to SFDPH for radiology orders, please complete the additional steps:
   • Place radiology order(s). Radiology orders that were ordered will appear on the Order Entry screen. Before signing the orders, click on radiology order hyperlink under Unsigned new order to update the order to the following:
1. **Status**: Future  
2. **Class**: Ancillary Performed  
3. **Reason for Exam**: Select appropriate reason for order  
4. **Dx Association**: Select appropriate diagnosis for order  
5. **Note**: there may be additional required order entry questions to be completed (this will depend on the type of radiology order that is placed)

### Associating diagnoses for multiple orders

You can:

1. Associate all of the patient's orders with all of the patient's diagnoses by clicking **Associate All** on the Diagnosis Associate page.  
2. Manually associate orders and diagnoses by selecting the appropriate check boxes.  
3. Select a problem from the Quick Picks list, which includes the patient's problems and recently-used diagnoses, and click the left arrow (←) icon to add the problem as a diagnosis for the encounter.  
4. Remove a diagnosis from the Diagnoses list by selecting the diagnosis and clicking the delete the selected diagnosis (−) icon.

### Cancel a signed order

1. Select the **Patient** tab and click **Order Review**.  
2. Select and cancel the order.  
3. Enter a reason for canceling and click **Accept**.

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### Working with eConsults/eReferrals
Refer to How to Submit an eConsult/eReferral for SFDPH CareLink tip sheet. This provides instructions on how to submit an eConsult/eReferral, view all prior patient consult/referral and diagnostic orders, respond to a specialist reviewer, close an eConsult, and search patient charts for old eConsults/eReferrals.

View a list of referrals for a patient
1. Select the Patient tab and click Referral by Member.
2. The patient's active referrals appear, including any that are new, open, authorized, or pending review. To see all referrals, select Show All Referrals in the View Option field.
3. For more information about a referral, click the referral ID link to view a report.

View a list of referrals for specific providers or locations
1. Select the Referral Search tab.
2. Select Outgoing to see eConsults/eReferrals sent to SFDPH placed by your organization.
3. In the Referred To or Referred By section, select one or more providers or locations.
4. In the Referral Status section, select each referral status that you want to include in your search results.
5. If you selected Outgoing in step 2, select a scheduling status in the Scheduling Status section.
6. Enter dates in the From and To fields to limit your search to particular dates.
7. Click Search.
8. For more information about a referral, click the referral ID link to view a report. Click to open the associated patient's chart.

Viewing Upcoming Appointments
The Upcoming Appointments reports sort appointments by patients in a particular patient group, if applicable, and then by date and time.

View upcoming appointments for your patients
1. Choose the upcoming appointments report you want:
   a. To view a report for all of your patients, select the and click Upcoming Appts - My Patients from the Navigation Tabs.
   ![Upcoming Appointments - My Patients](image)
   b. To view a report for one patient, select a patient, hover over the ellipses to reveal additional options, and select Upcoming Appts under Scheduling.
2. Click the double arrow ( ) icons to collapse or expand a section.

In Basket: Viewing Messages
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. Folders that group types of messages appear in the left pane. For example, you might see CC'd Charts or Referral Authorization folders. 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 (for example, Result Notifications).
2. Select a message to read its contents.

Search for a message
1. Click **Search**.

2. Enter as many search criteria as you want and click **Search**. You can search by patient, message type, status, recipient, priority, date, or any combination of these.

3. To return to your normal In Basket view, click **My In Basket**.

### Print multiple messages at once

If you are working with a paper system, you can print multiple In Basket messages to 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 and select the check boxes next to the messages that you want to print.

2. Click **Print Selected**.

3. Select the right 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, click the arrow next to **New Msg**, and select the type of message you want to send.

2. 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 **.**

3. Enter a brief subject in the **Subject** or **Summary** field.

4. 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.

5. Complete any other required fields.

6. Enter your message in the **Note** field.

7. When you are finished, click **Send Message**.

### Reply to or forward a message

1. Click a message to select it.

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

3. 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**.

2. Select a message type and then select a message to view it.

3. To return to your In Basket, click **My In Basket**.

### Updating Program Settings

You can use the SFDPH CareLink settings options to perform a variety of account maintenance tasks, including setting the page that appears when you first log in. In addition, you can choose to receive email notifications at an external email address when you are granted access to a patient. You can set your preferences for these notifications, as well as specify the email address at which you'd like to receive them.

You can change settings for other tasks, like determining your default patient selection method. A description of each setting appears on the **Settings** page in SFDPH CareLink.

### Set up your email preferences

1. Go to **Menu > Settings > User Demographics**.

2. In the **Receive e-mail notifications** field, indicate whether you want to receive notifications for unread In Basket messages at your specified email address.
3. In the **Days between e-mails** field, enter the number of days you want to wait between notification emails. 0 = no delay.

4. In the **Receive notifications for group events** field:
   - Select **Yes** to receive email notifications about all patient events for the provider groups you belong to.
   - Select **No** to only receive email notifications about patients you specifically have access to.

5. Click ✅ Save.

**Change your default login page**

1. Go to **Menu > Settings > Set Default Page**.
2. Go to the page that you want to set as your default page.
3. Click **Set Default Page** to set the current page as your default page.

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**Site Administrators**

This section is specific for Site Administrators. If you are a Site Administrator, please review the below items. **These are expected responsibilities and extra functionalities available only to Site Administrators.**

**Viewing Crystal Reports**

From the My Reports activity, you can view standard reports with relevant analytical data so you can track and follow up on trends, such as First Access usage.

**Access your Crystal reports**

1. Select the **Reporting** tab and click **My Reports**.
2. Click the report's link to view the most recent version of the report. To view a previous version of the report, expand the Previous Copies section and select the date of an available report you'd like to view.

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**Managing Your Clinic**

**Verify user records**

You will receive a Site Verification message from SFDPH every 6 months asking you to verify that all users working at your site are current and active. From the message, you can click **Verify Now** and you are brought to the **Site Verification** tab in 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 **Acknowledgement** check box to acknowledge that you have reviewed and confirmed the list of users.
3. Click ✅ Verify to verify the list of users and close the screen.

**Deactivate a user**

1. Select the **Manage My Clinic** tab.
2. On the **My Clinic** tab, select and deactivate the user.
3. Enter a comment indicating why you're deactivating the user and click **Deactivate**.

**Request a new user for SFDPH CareLink**

You still need to submit a ZSFG Hydra offboarding form. See [http://zsfg.ucsf.edu/offboarding](http://zsfg.ucsf.edu/offboarding).

You will need to request a DPH Active Directory account via the UCSF Account Request Form ([http://help.ucsf.edu](http://help.ucsf.edu)) and a SFDPH CareLink account via the DPH Service Desk.
1. Have your manager submit a UCSF Account Request Form (ARF) at [http://help.ucsf.edu](http://help.ucsf.edu) and be sure to select the DPH Active Directory option.

2. Once the DPH Active Directory account has been created, contact the DPH Service desk via phone (628-206-7378) or email (dph.helpdesk@sfdph.org) to request a SFDPH CareLink account.

3. Make sure to include the following information about the new user:
   
   a. First Name, Last Name  
   b. Date of Birth  
   c. Last 4 of SSN  
   d. Clinic Name – specify that you are a CareLink site  
   e. Work Address  
   f. Work Phone  
   g. Work Email  
   h. User Type:  
      1. Clinical Support Staff  
      2. Physician  
      3. Clinic Coordinator  
      4. Site Manager/Administrator  
      5. Alliance Health  
      6. DPH User

**Update facility contact information**

1. Select the Admin tab and click Manage My Clinic.
2. Select the My Facilities tab and click the name of a facility to update its contact information, including the phone number, fax number, and address.
3. After you've finished editing contact information, click ✔ Save.

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If an active address isn't on file, you can search for a matching address by entering an address and clicking **Find Address**. Alternatively, click **Manual Entry** to enter all of the address information yourself.

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**Number of Visits:**

```plaintext
0000203
```