

Site Administrator functions

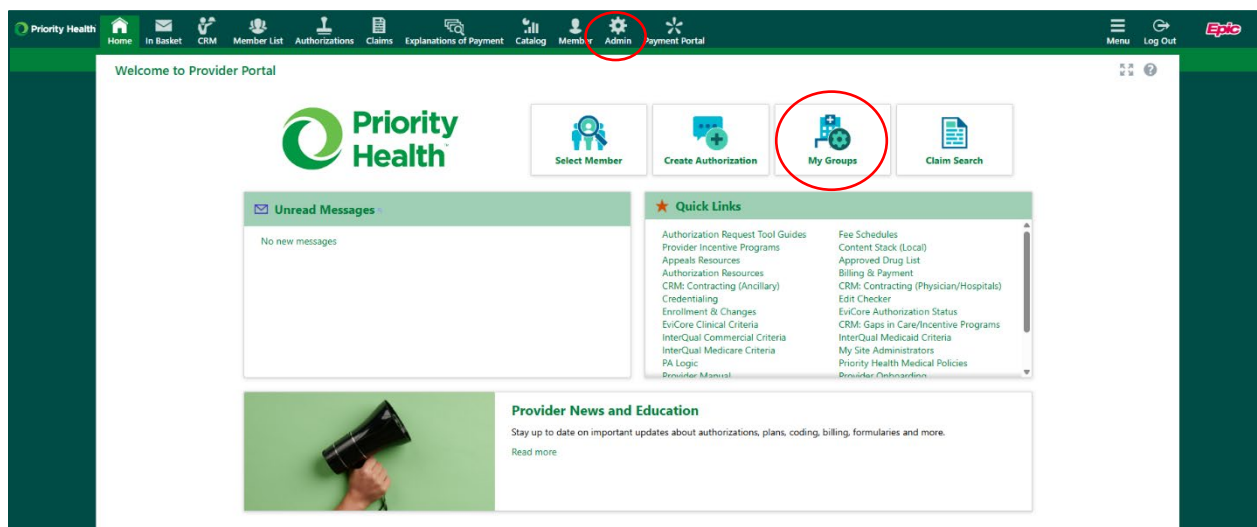
Provider Portal user guide

Navigating to the Admin workspace	1
Managing affiliated accounts	1
Reviewing account requests and requesting new affiliated accounts	2
Requesting Site Administrator status	3

At least one Site Administrator, or Site Admin, is needed for each site (Type 2 NPI). The Site Admin is responsible for ensuring appropriate access to the site's provider and patient data and for managing the accounts of affiliated users.

Navigating to the Admin workspace

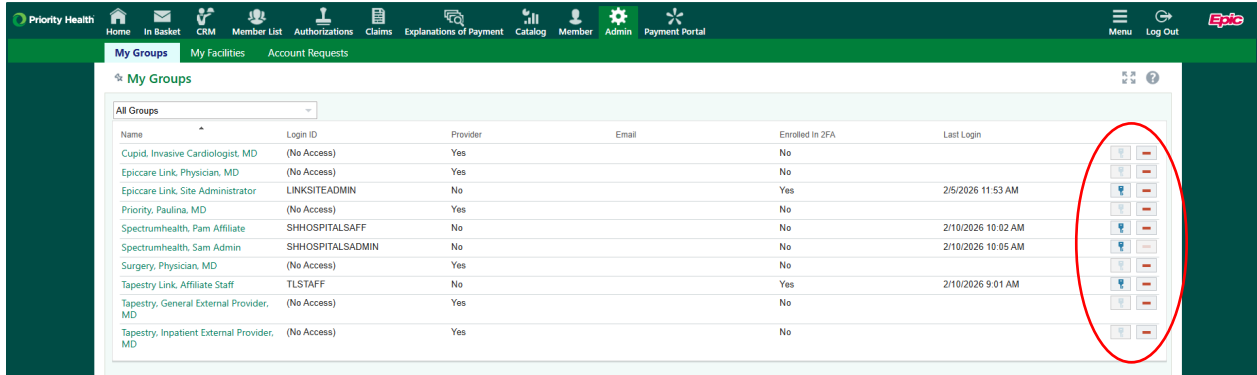
From anywhere in the portal, select **Admin** in the navigation bar across the top of the screen or select **My Groups** on the portal home screen.



If you're not seeing these options, you're not designated as a Site Administrator. Find your group's assigned Site Admin(s) by clicking **My Site Administrators** in the Quick Links box on the portal home page. To request Site Admin status for yourself, call our Tech Support team at **800.942.4765**, option 5, then option 1.

Managing affiliated accounts

In the **My Groups** tab, you can see a list of all portal users affiliated to your site, as well as their login ID, email and last time of login. You may also change the user's password or deactivate their account using the buttons on the end.



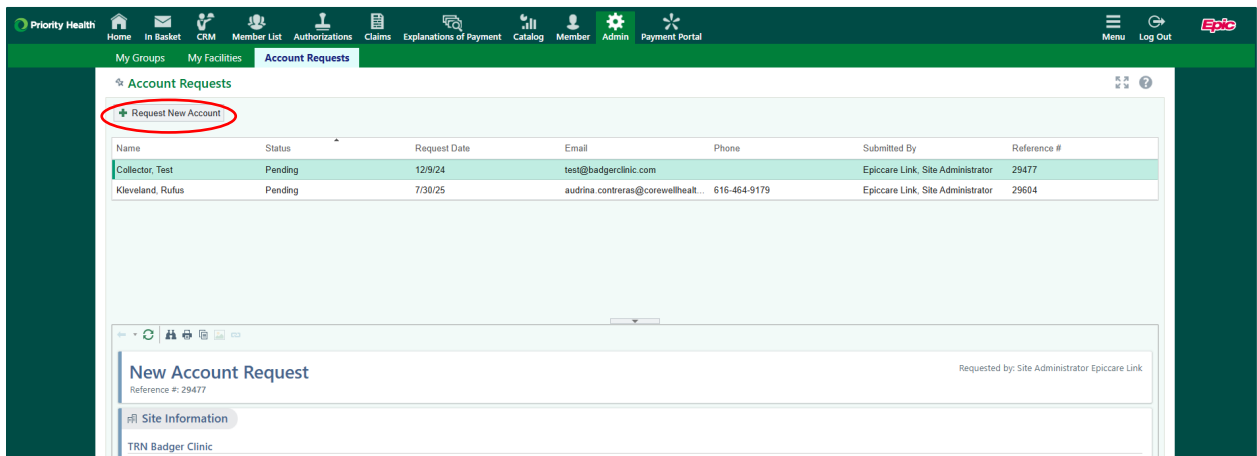
Name	Login ID	Provider	Email	Enrolled in 2FA	Last Login
Cupid, Invasive Cardiologist, MD	(No Access)	Yes		No	
Epiccare Link, Physician, MD	(No Access)	Yes		No	
Epiccare Link, Site Administrator	LINKSITEADMIN	No		Yes	2/5/2026 11:53 AM
Priority, Paulina, MD	(No Access)	Yes		No	
Spectrumhealth, Pam Affiliate	SHHOSPITALSAFF	No		No	2/10/2026 10:02 AM
Spectrumhealth, Sam Admin	SHHOSPITALSADMIN	No		No	2/10/2026 10:05 AM
Surgery, Physician, MD	(No Access)	Yes		No	
Tapestry Link, Affiliate Staff	TLSTAFF	No		Yes	2/10/2026 9:01 AM
Tapestry, General External Provider, MD	(No Access)	Yes		No	
Tapestry, Inpatient External Provider, MD	(No Access)	Yes		No	

By clicking on the user's name, you can enter their email address, address and phone number. You can also change their email notification and portal In Basket notification preferences.

Reviewing account requests and requesting new affiliated accounts

In the **Account Requests** tab you can see all open account requests. (New account requests for your site will automatically go to you for approval.) Approve or deny these requests by double-clicking the request and selecting either **Approve** or **Deny**.

You can also create a new affiliated user account here by clicking the **Request New Account** button and following the prompts. Once you've submitted the account request, the user on whose behalf you requested the account will be sent an email initiating identity verification.



Name	Status	Request Date	Email	Phone	Submitted By	Reference #
Collector, Test	Pending	12/9/24	test@badgerclinic.com		Epiccare Link, Site Administrator	29477
Kleveland, Rufus	Pending	7/30/25	audrina.contreras@corewellhealth...	616-464-9179	Epiccare Link, Site Administrator	29604

New Account Request
Reference #: 29477

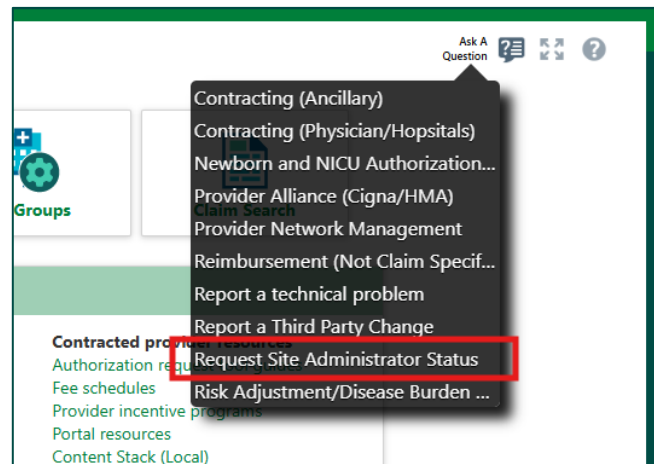
Requested by: Site Administrator Epiccare Link

Site Information

TRN Badger Clinic

Requesting Site Administrator status

There's no limit to the number of Site Administrators a site can have. If you want to request Site Administrator status for other users affiliated to your site, or if you want to have them request Site Administrator status for themselves, you can do so on the portal home page using the **Ask A Question** dropdown and selecting **Request Site Administrator Status**.



Fill in the pop-up box that appears, being sure to indicate in the first field if this is a request on behalf of someone else. Then enter their user ID in the next field.

Request Site Administrator Status

Priority: ☐ High ☒ Routine ☐ Low
Site:

When to Use this Request
Use this request only when a user is already affiliated to an NPI, and needs to become a Site Administrator. If they are not yet affiliated, please submit the request following the proper process.

Request Site Administrator Status

! Is this request for you or someone else?

Enter the other person's System Login / User ID

! What NPI is this change for?

! Why are you requesting this update?

Track the status of your request in your **CRMs**, searching for the **Site Admin Status** topic.