



# EpicU Registration Steps for Registering Direct Reports

E-mail [epictraining@uabmc.edu](mailto:epictraining@uabmc.edu) with any questions you may have.

## **Accessing the Epic U Learning Management System**

Prior to accessing Epic U from offsite, you will need to ensure you have claimed your UAB username. Information on this process can be found in an email from UAB Medicine HSIS [uabmedicinehsis@uabmc.edu](mailto:uabmedicinehsis@uabmc.edu).

\*\*If you are unable to find this message, please contact the UAB StVincent's Helpdesk at (205) 502-9990

Prior to accessing Epic U from offsite, you will also need to set up Multi-Factor Authenticator (MFA)

\*\*If you have not already set up MFA on site, you will need to do so using a UAB maintained HP Computer. If you need assistance, please contact the UAB St. Vincent's Helpdesk at (205) 502-9990.

## **1. Go to <https://training.epic.com/EndUserTraining>**

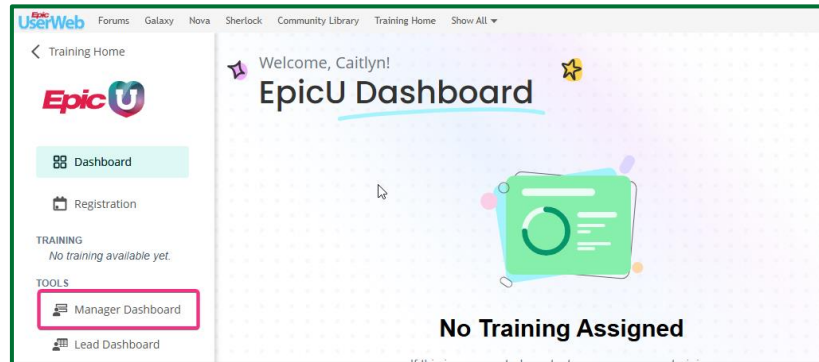
- Log in with your UAB AD Username and password.
- If this is your first time accessing the Epic UserWeb, you will need to register your account.
  - Select 'UAB Medicine' for the organization.
  - Log in using your AD Username ([@uabmc.edu](mailto:@uabmc.edu)) and password.
  - If you do not know your AD Username and/or password, contact the UAB St. Vincent's Helpdesk at (205) 502-9990.
  - After registering, you may be directed to the Epic UserWeb homepage. From there you will navigate back to <https://training.epic.com/EndUserTraining>.
- 2. Once you log into Epic U, update your preferred contact email to receive notifications on class registration. \*For those who do not have an active uabmc.edu email, you will need to add a preferred contact to receive any Epic U communication.
  - Click your name in the top right corner.
  - Click "Edit your profile."
  - Select 'Change' under 'Preferred Email Contact.'
  - You will not be able to change the Work Email, but you will get notifications to the 'Preferred Contact Email' listed.

## **Registering direct reports for classes**

1. Go to <https://training.epic.com/EndUserTraining>
2. Navigate to the **Manager Dashboard**



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## 3. You will see a list of users that report directly to you on the Manager Dashboard

| Trainee   | Status                  | Registration                                    | Completion                                      | Assessments       |
|---|-------------------------|---|---|-------------------|
| <b>Claire Aulwes</b><br>claire.aulwes@cghmc.com<br>Employee ID: caulwe        | Registration Incomplete | 0 / 4<br>0 / 4 Classes<br>No Readiness Activity | 0 / 4<br>0 / 4 Classes<br>No Readiness Activity | 0 / 6 Assessments |
| <b>Candance Bousum</b><br>candance.bousum@cghmc.com<br>Employee ID: cbousu    | Registration Incomplete | 0 / 3<br>0 / 3 Classes<br>No Readiness Activity | 0 / 3<br>0 / 3 Classes<br>No Readiness Activity | 0 / 5 Assessments |
| <b>Jodi Pope</b><br>jodi.pope@cghmc.com<br>Employee ID: jpope                 | Registration Incomplete | 0 / 3<br>0 / 3 Classes<br>No Readiness Activity | 0 / 3<br>0 / 3 Classes<br>No Readiness Activity | 0 / 5 Assessments |
| <b>Andrea Camper</b><br>andrea.camper@cghmc.com<br>Employee ID: ancampe       | Registration Incomplete | 0 / 2<br>0 / 2 Classes<br>No Readiness Activity | 0 / 2<br>0 / 2 Classes<br>No Readiness Activity | 0 / 5 Assessments |
| <b>Theresa Molina</b><br>theresa.molina@cghmc.com<br>Employee ID: tmolin      | Registration Incomplete | 0 / 2<br>0 / 2 Classes<br>No Readiness Activity | 0 / 2<br>0 / 2 Classes<br>No Readiness Activity | 0 / 4 Assessments |
| <b>Adrienne O'Bryant</b><br>adrienne.obryant@cghmc.com<br>Employee ID: aobrya | Registration Incomplete | 0 / 2<br>0 / 2 Classes<br>No Readiness Activity | 0 / 2<br>0 / 2 Classes<br>No Readiness Activity | 0 / 4 Assessments |

## Review trainees

1. If you identify a person on the list who has changed managers or job roles or left the organization since you completed Manager Validation
  - Log in to Hyperspace Manager Validations by using your UAB credentials
    - Select a department
    - Clear filters and locate the employee
      - Changed Managers: Select “Wrong Manager” and place a comment with the name of the new manager.



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- Changed roles: Select “Update Job category” and select a new job category
- Left the Organization: Select “Employee Leaving” and provide a comment with the date of employees termination of their position.
- Email [EpicTraining@uabmc.edu](mailto:EpicTraining@uabmc.edu)
  - Changed Managers: In the email, identify the person's legal first and last name, who their new manager is (and cc them) if applicable, and what their new department/ job title is.
  - Changed roles: In the email, identify the person’s legal first, middle, last name, uabmc ID, and new job category
  - Incorrect role: find another user to mirror that has the correct job category and e-mail both user’s legal full names and identify which is the correct one to mirror
- 2. If you are missing an employee, please contact [epictraining@uabmc.edu](mailto:epictraining@uabmc.edu) and let them know the legal first, middle, last name of the employee, the job category needed, and the date of hire.

### **Registering End Users**

1. **To begin registering a user** that you are the manager for, click their name on your manager dashboard
2. On the right hand side you will see **buttons to Register for each class that needs to be registered for**



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View EpicU Homepage

Job Categories:

- Clinician Scheduler - Outpatient
- Medical Assistant - Outpatient
- Nurse - Urgent Care - with Urgent Care Module

[Show More](#)

Track  
**Outpatient Clinical Support** Incomplete

- Class  
Outpatient Clinical Basics Needs Registration **Register**
- Assessment  
Outpatient Clinical Basics Assessment Incomplete
- Class  
Outpatient Clinical Advanced Needs Registration **Register**
- Assessment  
Outpatient Clinical Advanced Assessment Incomplete

Track  
**Urgent Care Clinical Support** Incomplete

- Class  
Outpatient Clinical Basics Needs Registration **Register**
- Assessment  
Outpatient Clinical Basics Assessment Incomplete
- Class  
Urgent Care Clinical Support (EpicCare Ambulatory) Needs Registration **Register**
- Assessment  
Urgent Care Clinical Support Assessment Incomplete

3. Select **Register** to review a list of available offerings. Select show more offerings if you'd like to review the full list.

- Find a time and location that is most convenient for your direct report. (For St. Vincent's Birmingham locations, you will see classroom locations at Birmingham and East)
- Superusers must be registered for a class between April 27<sup>th</sup> and May 22<sup>nd</sup>.

| Outpatient Clinical Basics         |                                  |          |                          |
|------------------------------------|----------------------------------|----------|--------------------------|
| ▼ Upcoming Sessions:               |                                  |          |                          |
| Location                           | Date and Time ⓘ                  | Enrolled | Status                   |
| Epicenter                          | Tue Sep 2 11:30 AM-4:00 PM (CDT) | 2/6      | <a href="#">Register</a> |
| Classroom 1                        | Wed Sep 3 11:30 AM-4:00 PM (CDT) | 2/10     | <a href="#">Register</a> |
| Epicenter                          | Thu Sep 4 4:30 PM-9:00 PM (CDT)  | 0/10     | <a href="#">Register</a> |
| CGH Training Room                  | Sat Sep 6 9:00 AM-1:30 PM (CDT)  | 0/12     | <a href="#">Register</a> |
| <a href="#">Show More Sessions</a> |                                  |          |                          |



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4. Select **Register** in line with the class you'd like this person to attend.

- Be mindful of the class location, as you may see classes at different sites (for St. Vincent's Birmingham and St. Vincent's East)
- **If a pre-requisite class will not be completed in time for an offering of the follow up class,** Epic U will indicate that the prerequisites are not yet complete and a different offering should be selected.

| Outpatient Clinical Advanced |                                   |          |                          |                        |
|------------------------------|-----------------------------------|----------|--------------------------|------------------------|
| Upcoming Sessions:           |                                   |          |                          |                        |
| Location                     | Date and Time                     | Enrolled | Status                   |                        |
| Epicenter                    | Wed Aug 6 11:30 AM-4:00 PM (CDT)  | 0/4      | Incomplete Prerequisites |                        |
| Classroom 3                  | Tue Aug 12 11:30 AM-4:00 PM (CDT) | 0/6      | Register                 | Add - session starting |
| Classroom 3                  | Wed Aug 13 11:30 AM-4:00 PM (CDT) | 0/6      | Register                 |                        |
| Classroom 3                  | Tue Aug 26 11:30 AM-4:00 PM (CDT) | 0/6      | Register                 |                        |

5. Navigate to each class listed that needs registration and perform the above steps.

6. **After all classes that require registration are registered for** they will show (1) Edit Registration. Some tracks may only require asynchronous learnings. These will not indicate an option to Register or Edit Registration (2).

Track  
**Outpatient Clinical Support** Incomplete

- Class  
Outpatient Clinical Basics Registered 1 Edit Registration
- Assessment  
Outpatient Clinical Basics Assessment Incomplete
- Class  
Outpatient Clinical Advanced Registered Edit Registration
- Assessment  
Outpatient Clinical Advanced Assessment Incomplete

Track  
**PCT Unit Clerk** Incomplete

- Class  
PCT Unit Clerk Registered Edit Registration
- Assessment  
PCT Unit Clerk Assessment Incomplete

Track  
**Clinical Scheduler without Registration** Incomplete 2

- Assessment  
Clinical Scheduler without Registration Assessment Incomplete



# EPICU Registration Steps for Registering Direct Reports

7. By closing out the sidebar view you can review overall registration statuses.

|  |                           |       |  |       |  |                   |
|--|---------------------------|-------|--|-------|--|-------------------|
|  | 🔴 Registration Incomplete | 0 / 1 | 0 / 1 Classes<br>No Readiness Activity | 0 / 1 | 0 / 1 Classes<br>No Readiness Activity | 0 / 1 Assessments |
|  | 🔴 Registration Incomplete | 0 / 1 | 0 / 1 Classes<br>No Readiness Activity | 0 / 1 | 0 / 1 Classes<br>No Readiness Activity | 0 / 1 Assessments |
|  | 🔴 Registration Incomplete | 0 / 1 | 0 / 1 Classes<br>No Readiness Activity | 0 / 1 | 0 / 1 Classes<br>No Readiness Activity | 0 / 1 Assessments |
|  | 🟢 Registration Complete   | 3 / 3 | 3 / 3 Classes<br>No Readiness Activity | 0 / 3 | 0 / 3 Classes<br>No Readiness Activity | 0 / 5 Assessments |
|  | 🟢 Registration Complete   | 2 / 2 | 2 / 2 Classes<br>No Readiness Activity | 0 / 2 | 0 / 2 Classes<br>No Readiness Activity | 0 / 4 Assessments |
|  | 🟢 Registration Complete   | 2 / 2 | 2 / 2 Classes<br>No Readiness Activity | 0 / 2 | 0 / 2 Classes<br>No Readiness Activity | 0 / 4 Assessments |
|  | 🟢 Registration Complete   | 2 / 2 | 2 / 2 Classes<br>No Readiness Activity | 0 / 2 | 0 / 2 Classes<br>No Readiness Activity | 0 / 4 Assessments |

## Registration Assistance

**If you need your UAB AD Username and/or password reset or need assistance with setting up Multifactor Authenticator, contact the UAB Helpdesk at (205) 502-9990**

**If you need assistance navigating Epic U, please attend one of our virtual open office hours February 17 thru April 10<sup>th</sup>. Offered Tuesday and Thursday 7am-8am and 2pm-4pm.**

- **Microsoft Teams** [Need help?](#)  
[Join the meeting now](#)  
Meeting ID: 212 839 866 586 17  
Passcode: Kv6y7Ei3

## Registration FAQs

**What if do not know my AD Username and/or password?** Please reach out to the UAB St. Vincent's Help Desk at (205) 502-9990

**What if I am seeing a message "Unauthorized User?"** Please reach out to the UAB St. Vincent's Help Desk at (205) 502-9990



## EpicU Registration Steps for Registering Direct Reports

**What if I have not received registration information and I have direct reports who will need to be trained for Wave 1, St. Vincent's Go Live?** Please reach out to [EpicTraining@uabmc.edu](mailto:EpicTraining@uabmc.edu) and provide the names of your employees.

**What if I received registration information and I do not have direct reports who will need to be trained for Wave 1, St. Vincent's Go Live?** Please reach out to [EpicTraining@uabmc.edu](mailto:EpicTraining@uabmc.edu)

**What if I have employees listed that no longer work for me?**

- If you have an employee that has left the organization, please reach out to [EpicManagerValidation@uabmc.edu](mailto:EpicManagerValidation@uabmc.edu) and provide your name, the employees name, and date they left the organization
- If you have an employee that has transferred to a new location, please reach out to [EpicManagerValidation@uabmc.edu](mailto:EpicManagerValidation@uabmc.edu) and provide your name, the employees name, the name of the current manager, and new job category if you are aware.

**What if I am missing an employee?** Contact [EpicManagerValidation@uabmc.edu](mailto:EpicManagerValidation@uabmc.edu) and provide the employees' legal first and last name, job category, and date of hire.

**What if the training I have assigned does not match my employee's role?** Do not register them for a class that does not match their practice area. Instead, please reach out to [EpicTraining@uabmc.edu](mailto:EpicTraining@uabmc.edu) and provide your employee's legal first, middle, last name along with information that their job category doesn't match their work role, include what should be assigned and/or someone to mirror them to, and your call back number so we can follow up.

**What if I have an employee whose training doesn't match their job role?** Log into Hyperspace (Insert Link) and update their job category. (See 'Manager Validation instruction' attachment) If you need assistance selecting the appropriate job category, contact [EpicTraining@uabmc.edu](mailto:EpicTraining@uabmc.edu) or [EpicManagerValidation@uabmc.edu](mailto:EpicManagerValidation@uabmc.edu)

**What if there is a lock on the class that works for my employee's clinical schedule?** This class is full or you have not registered for a prerequisite.

**What is Thrive?** This is a class offering focused on updating user settings, learning how to perform workflows in fewer steps and discovering other tips and tricks to improve efficiency. Classes are discipline-specific and open to all members of the Epic community. Track may include one or two classes. These offerings are strongly recommended but not required. Classes are 2 hours and focus on:

- Personalized note templates
- Tools to optimize ordering workflow
- In Basket quick actions



## EpicU Registration Steps for Registering Direct Reports

- How to keep a cleaner workspace to reduce cognitive overload

**How do I know who my superusers are? They will have a red badge and will need to be scheduled for class between April 26<sup>th</sup> – May 22<sup>nd</sup>.**

