



Research November 2025 Release Education

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How to Use This Document

Review this guide, which will contain changes that are specific to Reporting.

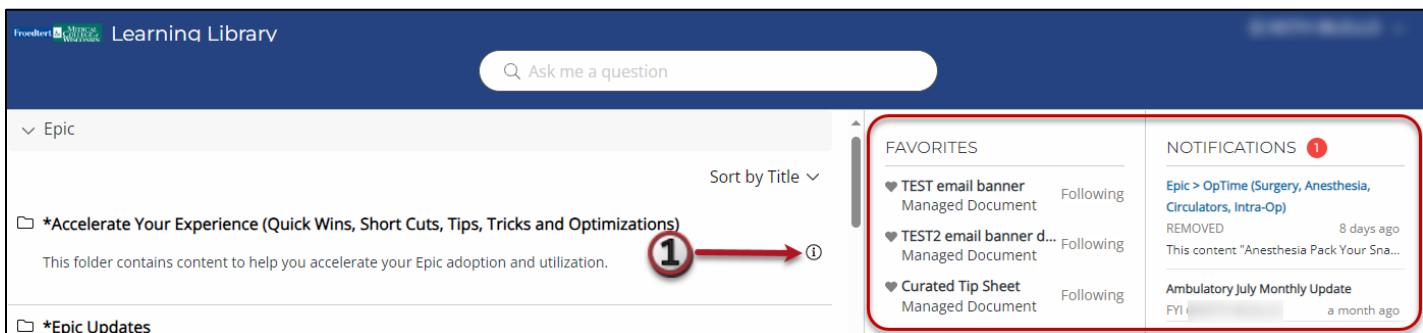
Content found in this guide is subject to change as build is tested and finalized. Please be sure to review other Epic applications changes that may affect you in your role.

Please follow these guidelines:

- **Do not print this material.**
 - For your convenience, this document may contain links to *training resources*.
 - You can use CTRL +F to search this document manually or jump to a topic utilizing the table of contents.

To Favorite and Follow the Epic Updates Learning Library folder:

1. Click the **Info** icon.
 - a. Once you have favorited and followed a folder or document, they will display on the right of your Learning Library.



Learning Library

Ask me a question

Epic

*Accelerate Your Experience (Quick Wins, Short Cuts, Tips, Tricks and Optimizations)

This folder contains content to help you accelerate your Epic adoption and utilization.

*Epic Updates

Sort by Title

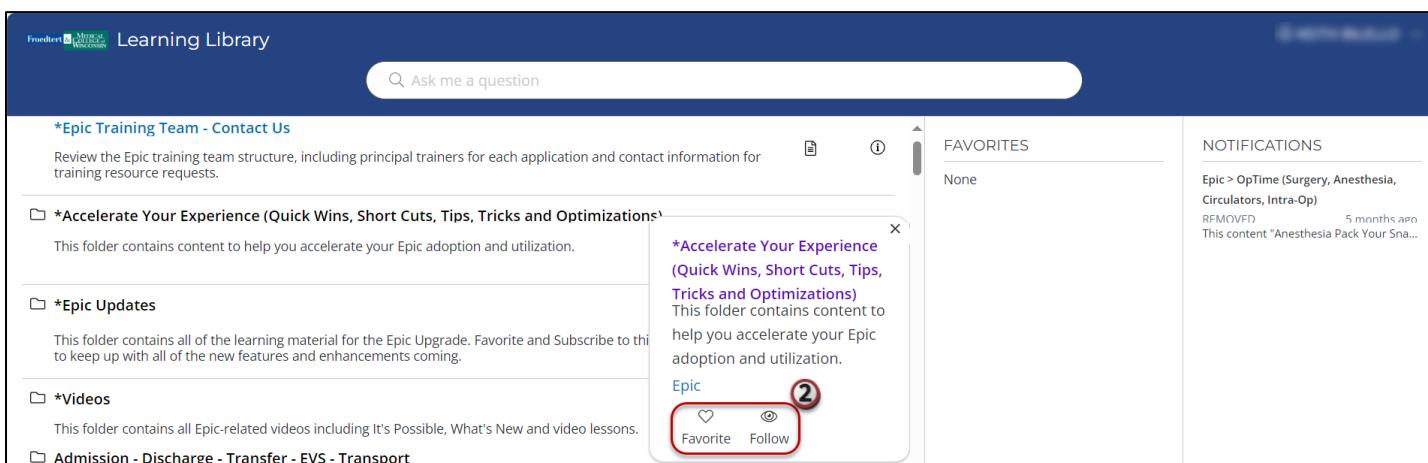
FAVORITES

- TEST email banner Managed Document Following
- TEST2 email banner d... Managed Document Following
- Curated Tip Sheet Managed Document Following

NOTIFICATIONS 1

- Epic > OpTime (Surgery, Anesthesia, Circulators, Intra-Op) REMOVED 8 days ago This content "Anesthesia Pack Your Sna..."
- Ambulatory July Monthly Update FYI! 5 months ago a month ago

2. Stay current on any document within that folder.



Learning Library

Ask me a question

*Epic Training Team - Contact Us

Review the Epic training team structure, including principal trainers for each application and contact information for training resource requests.

*Accelerate Your Experience (Quick Wins, Short Cuts, Tips, Tricks and Optimizations)

This folder contains content to help you accelerate your Epic adoption and utilization.

*Epic Updates

This folder contains all of the learning material for the Epic Upgrade. Favorite and Subscribe to this to keep up with all of the new features and enhancements coming.

*Videos

This folder contains all Epic-related videos including It's Possible, What's New and video lessons.

Admission - Discharge - Transfer - EVS - Transport

FAVORITES

None

NOTIFICATIONS

- Epic > OpTime (Surgery, Anesthesia, Circulators, Intra-Op) REMOVED 5 months ago This content "Anesthesia Pack Your Sna..."

Important Updates

Dashboards and Reports

How Are All My Studies Going? Just Check the Dashboard

New dashboard 95008-Research Study Team - My Studies centralizes research reporting content, while also automatically filtering the data to show information for only the studies that the user is listed on. By using this dashboard instead of one you might currently be using, users have access to future enhancements without manual setup.

The dashboard components are categorized to assist with prioritization of information:

- Daily Review - Shows the information that would benefit from being reviewed on a daily basis, such as serious adverse events needing review
- Recruitment & Accrual - Shows current and potential study participants, as well as patients that might need follow-up on their recruitment outreach
- Routine Review - Shows data relevant to the execution of studies, like patient timelines and tasks
- Enrollment Corrections - Shows enrollment data that is an invalid state, such as patients enrolled on inactive studies
- Resources & Tools - Provides access to other important tools, such as In Basket, study-specific dashboards, and favorited or tagged Reporting Workbench reports

Research Study Team - My Studies ▾

Daily Review

Appointments Next 14 Days <small>Report completed: Wed 5/21 11:58 AM</small> 2 Total Appointments See report for details	Appointments Linked to a Research Study <small>Report completed: Wed 5/21 11:58 AM</small> 2 Appointments See report for details	Study Team Billing Review <small>Report completed: Wed 5/21 12:00 PM</small> 139 Patients Awaiting Study Team Review	SAEs Needing Review <small>Report completed: Wed 5/21 02:16 PM</small> 3,803,454 Outstanding Balance Awaiting Study Team Review	Serious Adverse Events <small>Report completed: Wed 5/21 11:58 AM</small> 5 Serious Adverse Events See report for details	Overdue Tasks <small>Report completed: Wed 5/21 11:58 AM</small> 76 Tasks See report for details
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Recruitment & Accrual

Actively Enrolled Patients <small>Report completed: Wed 5/21 11:58 AM</small> 97 Patients See report for details	Patients Needing a Timeline <small>Report completed: Wed 5/21 11:58 AM</small> 51 Patients See report for details	Patients Missing Timeline Dates <small>Report completed: Wed 5/21 11:58 AM</small> 23 Patients See report for details	Actively Enrolled with a Deceased Status <small>Report completed: Wed 5/21 11:58 AM</small> 2 Patients See report for details	Actively Enrolled with Past End Date <small>Report completed: Wed 5/21 11:58 AM</small> 1 Patients See report for details
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Routine Review

Adverse Events Needing Review 72+ Hours <small>Report completed: Wed 5/21 02:16 PM</small> 16 Adverse Events See report for details	Patients Due Within a Week <small>Report completed: Wed 5/21 11:58 AM</small> 96 Tasks See report for details	Contraindicated Meds in the Last 14 Days <small>Report completed: Wed 5/21 11:58 AM</small> 3 Patients See report for details
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Enrollment Corrections

Actively Enrolled in Inactive Studies <small>Report completed: Wed 5/21 11:58 AM</small> 12 Patients See report for details
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Resources & Tools

In Basket Glance <small>Report completed: Wed 5/21 11:58 AM</small>
My Study Dashboards <small>Report completed: Wed 5/21 11:58 AM</small>
Research Study <small>IRB# 101</small> BREAST CANCER STAGE II-BRCA0142 <small>Principal Investigator Physician Beacon, MD</small>
FS Asthma Control and Treatment Effectiveness Study <small>102</small> Physician Pulmonary, MD
FS RESEARCH STUDY - CHRONIC PAIN <small>108</small> Md Investigator Research, MD
FS Research Study - COVID Vaccination Adult Respiratory Outcomes <small>—</small> Md Investigator Research, MD
FS RESEARCH STUDY-CARDIOLOGY <small>104</small> Cardiologist Cupid, MD
FS RESEARCH STUDY-DERMATOLOGY <small>103</small> Physician Dermatology, MD
FS RESEARCH STUDY-DIABETES LONGITUDINAL STUDY <small>105</small> Phd Investigator Research, PhD
Study Monitor Releases for My Studies
Upcoming IRB Expiration Dates <small>One or more dates expired</small>
Last Refresh: 02/17/09 PM No research studies specified; using your studies. No date range specified; using default of 90 days.
Expires In <small>Expiration Date</small> Research Study
Expired <small>3/6/2025</small> BREAST CANCER STAGE II-BRCA0142
T Reporting Workbench Tagged Content and Favorites

Components with a yellow or red badge indicate areas where urgent action might need to be taken.

Research Notes

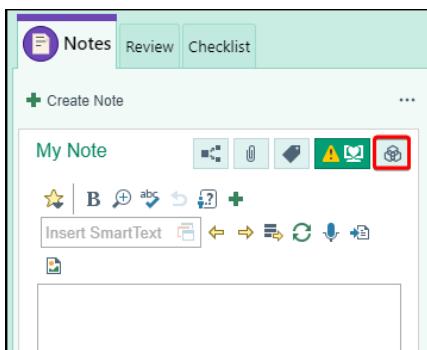
Link Notes to Research Studies for Easier Reporting and Automated Withholding

Study team members can now link notes to a research study the patient is actively enrolled in to help them more easily find research-related notes in a patient's chart and automatically share notes based on any release restrictions configured in the study. If the encounter is linked to a research study, a window appears to recommend study team members to link notes to the research study when they sign the note. When you link research-related notes to the study:

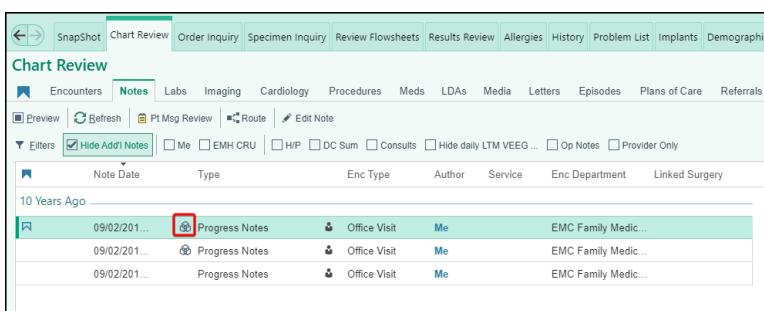
- Linked notes appear in Chart Review, enrollment report 57100-Generic Research Study Enrollment, and Reporting Workbench report 95069-Notes Linked to My Studies so users can easily find them.
- Study team members can use research SmartLinks to speed up their documentation.
- Study team members save time managing note sharing.

In the Notes tab of Chart Review, a research study icon appears in the Linked Research Study column if the note is linked to a study. Hovering over the icon shows the linked study if users have Research security points 101-View Study-Patient Associations for My Studies Only or 201-View Study-Patient Associations for Any Study. The Linked Research Study column and filter appears only if there is at least one note that is linked to a study.

To help study team members and clinical staff quickly enter study information in a linked note, they can use SmartLinks to pull in study information linked to the note, such as @rshname@, @rshdesc@, and @rshcode@.



Study team members can use the new research button to link a note to a research study in the Notes activity if they have the security.

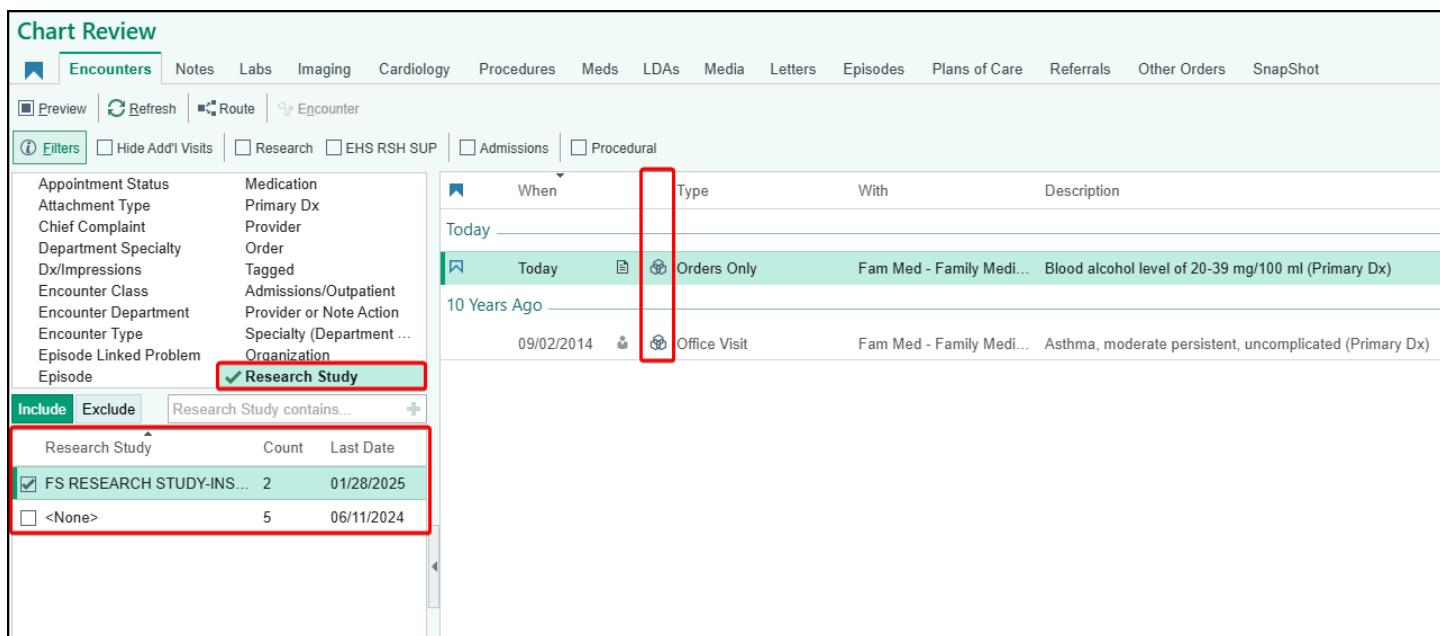


Study team members can identify research-linked notes with the research icon in Chart Review column Notes/Linked Research Study.

Encounters, Medications, and Orders

Study Teams Can Easily Identify Research-Linked Encounters, Medications, and Orders in Chart Review

Users with chart security can more easily see encounters, medications, and orders that are linked to a research study in Chart Review using the new dynamic research study column and Research Study filter. Users see the research study column in Chart Review tabs only when the patient has a research-linked encounter, medication, or order. Previously, study team members could only filter encounters by whether they're research-linked. If study team members want to view a patient's research-linked encounters, medications, and orders for only their studies, they can also create quick filters for the studies they are most interested in seeing. Refer to the Quick Filters topic for more information about creating quick action buttons.



The screenshot shows the 'Chart Review' interface. At the top, there are tabs for Encounters, Notes, Labs, Imaging, Cardiology, Procedures, Meds, LDAs, Media, Letters, Episodes, Plans of Care, Referrals, Other Orders, and SnapShot. The 'Encounters' tab is selected. Below the tabs are buttons for Preview, Refresh, Route, and Encounter. A 'Filters' button is highlighted with a red box. To the right of the filters are checkboxes for Hide Add'l Visits, Research, EHS RSH SUP, Admissions, and Procedural. A dropdown menu shows 'When' (Today, 10 Years Ago) and 'Type' (Orders Only, Office Visit). The main table lists encounters with columns for When, Type, With, and Description. The first row shows a medication entry. The second row, highlighted with a red box, shows an order entry for 'Fam Med - Family Medi...' with the description 'Blood alcohol level of 20-39 mg/100 ml (Primary Dx)'. The third row shows an office visit entry. At the bottom left, a 'Research Study' section shows a table with columns for Research Study, Count, and Last Date. It lists 'FS RESEARCH STUDY-INS...' (Count 2, Last Date 01/28/2025) and '<None>' (Count 5, Last Date 06/11/2024). The 'Research Study' section is also highlighted with a red box.

Study team members with proper security can view and filter encounters, medications, or orders linked to a specific research study.

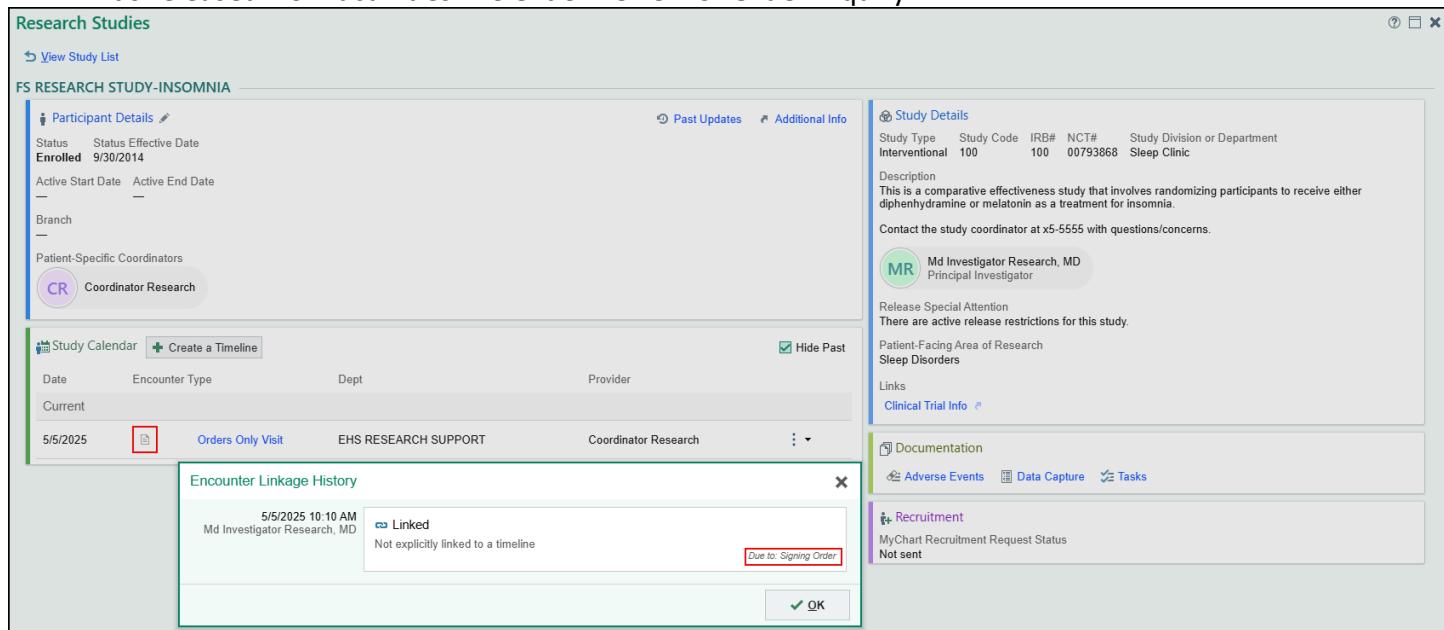
We'll Link 'Em (Encounters) If You've Got 'Em (Research-Linked Orders)

When users sign or release research-linked orders, the patient encounter is now automatically linked to the order's study if it wasn't already. This helps ensure that encounters are flagged as having research activity in scenarios where study team members forget or are not able to manually link encounters.

We still recommend that encounters be linked to study ahead of time when possible, because this helps ensure accurate documentation throughout the system, ensures appointment change notifications can trigger to the study team, and enhances research billing workflows.

The automatic encounter linking happens when any of the following occurs for a research-linked order on an encounter that hasn't already been linked:

- It's signed by the cosigner
- It's signed with the first signature of a second-sign order
- It's released from being signed and held
- It's released from activities like Order Review or Order Inquiry



The screenshot shows the 'Research Studies' interface for the 'FS RESEARCH STUDY-INSOMNIA'. The 'Participant Details' section shows the participant is Enrolled (9/30/2014) and Active Start Date is Active End Date. The 'Study Details' section shows the study is Interventional (100) and involves diphendryamine or melatonin for insomnia. The 'Encounter Linkage History' window is open, showing a signed order on 5/5/2025 at 10:10 AM by 'Md Investigator Research, MD'. The status is 'Linked' and it is noted that the encounter is not explicitly linked to a timeline. A red box highlights the 'Linked' status. A red box also highlights the 'Due to: Signing Order' note. A green 'OK' button is at the bottom right of the history window.

Training Completion Certificate

Thank you for taking the time to view this important information regarding the **November 2025 Upgrade**.

To commemorate this task, please click [**HERE**](#) to download a generic, printable completion certificate.

Please note: This is a read-only version and cannot be electronically altered. If you would like, please print the certificate and handwrite your name.