



Research November 2025 Release Education

How to Use This Document..... 2

Important Updates 3

 Dashboards and Reports 3

 Research Notes..... 4

 Encounters, Medications, and Orders 5

Training Completion Certificate 7

How to Use This Document

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

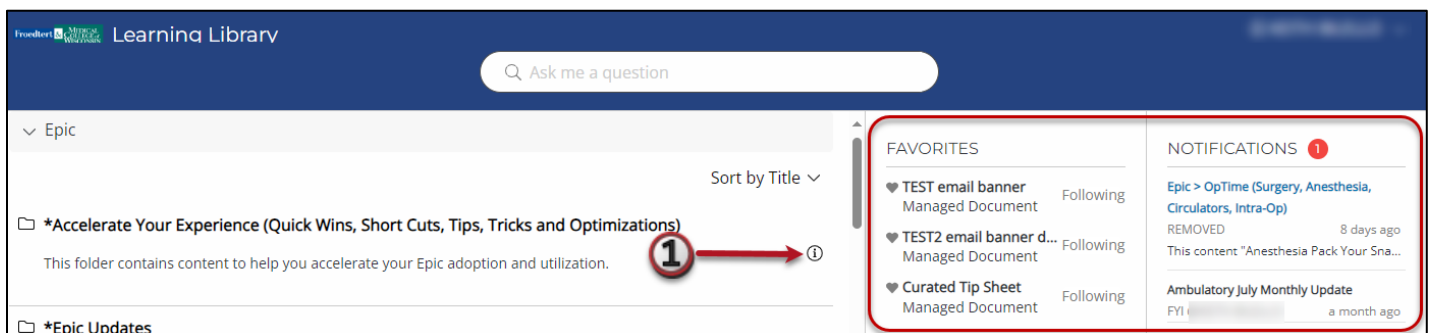
Content found in this guide is subject to change as build is tested and finalized. Please be sure to review other Epic applications changes that may affect you in your role.

Please follow these guidelines:

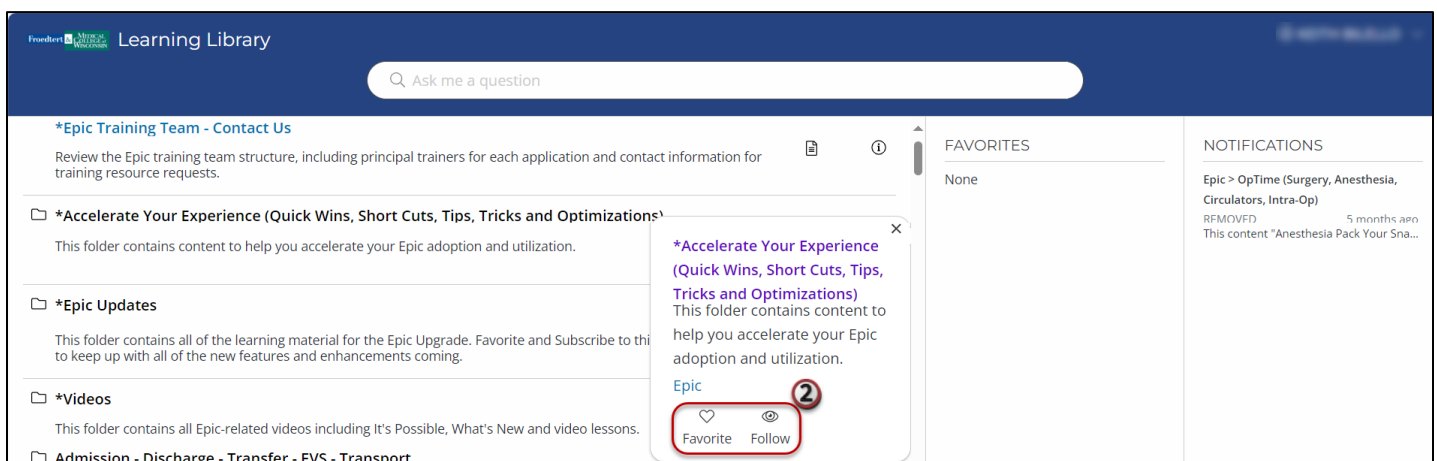
- **Do not print this material.**
 - For your convenience, this document may contain links to *training resources*.
 - You can use CTRL +F to search this document manually or jump to a topic utilizing the table of contents.

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.



2. Stay current on any document within that folder.



Important Updates

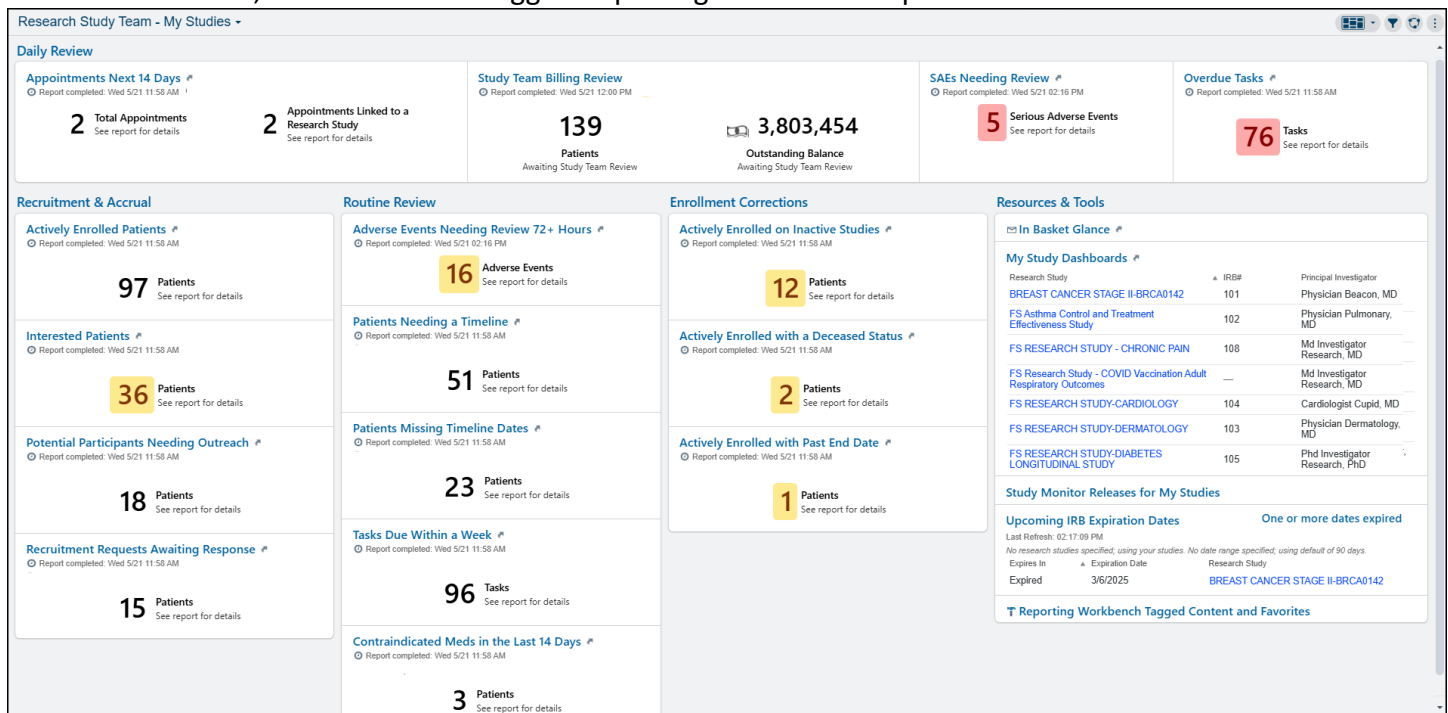
Dashboards and Reports

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 in 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



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

Research Notes

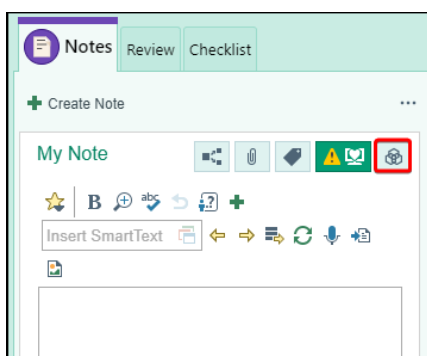
Link Notes to Research Studies for Easier Reporting and Automated Withholding

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:

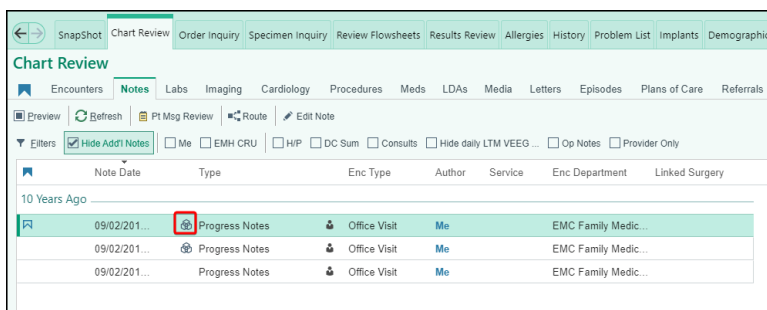
- Linked notes appear in Chart Review, enrollment report 57100-Generic Research Study Enrollment, and Reporting Workbench report 95069-Notes Linked to My Studies so users can easily find them.
- Study team members can use research SmartLinks to speed up their documentation.
- Study team members save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

Chart Review

Encounters | Notes | Labs | Imaging | Cardiology | Procedures | Meds | LDAs | Media | Letters | Episodes | Plans of Care | Referrals | Other Orders | SnapShot

Preview | Refresh | Route | Encounter

Filters | Hide Add'l Visits | Research | EHS RSH SUP | Admissions | Procedural

Appointment Status

Attachment Type

Chief Complaint

Department Specialty

Dx/Impressions

Encounter Class

Encounter Department

Encounter Type

Episode Linked Problem

Episode

Medication

Primary Dx

Provider

Order

Tagged

Admissions/Outpatient

Provider or Note Action

Specialty (Department ...)

Organization

Research Study

Include | Exclude

Research Study contains...

Research Study	Count	Last Date
<input checked="" type="checkbox"/> FS RESEARCH STUDY-INS...	2	01/28/2025
<input type="checkbox"/> <None>	5	06/11/2024

When

Type

With

Description

Today

Today

Orders Only

Fam Med - Family Medi...

Blood alcohol level of 20-39 mg/100 ml (Primary Dx)

10 Years Ago

09/02/2014

Office Visit

Fam Med - Family Medi...

Asthma, moderate persistent, uncomplicated (Primary Dx)

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 displays the 'Research Studies' interface. The main panel shows details for 'FS RESEARCH STUDY-INSOMNIA'. On the left, 'Participant Details' shows the status as 'Enrolled' with an effective date of 9/30/2014. The 'Study Calendar' table lists an encounter on 5/5/2025 of type 'Orders Only Visit' by 'Coordinator Research'. A pop-up window titled 'Encounter Linkage History' is open, showing a log entry for 5/5/2025 10:10 AM where the encounter was 'Linked' to the study. The message states 'Not explicitly linked to a timeline' and includes a red box with the text 'Due to: Signing Order'. An 'OK' button is at the bottom of the pop-up. The right sidebar contains 'Study Details' (Interventional study, IRB# 100, NCT# 00793868), 'Documentation' (Adverse Events, Data Capture, Tasks), and 'Recruitment' (MyChart Recruitment Request Status: Not sent).

Date	Encounter Type	Dept	Provider
5/5/2025	Orders Only Visit	EHS RESEARCH SUPPORT	Coordinator Research

Encounter Linkage History

5/5/2025 10:10 AM
Md Investigator Research, MD

Linked
Not explicitly linked to a timeline

Due to: Signing Order

OK

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.