Clinical Research Coordinator - Release Patients to Study Monitors

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Release information to study monitors using EpicCare Link

Once your study monitor has access to EpicCare Link, you will be able to release patients to them in real time as well as schedule future releases.

1. Run the **Patients Associated with My Studies** report from your Research Coordinator - My Studies dashboard.
2. Click the report title to open the report results.
3. Select the patients whose records you want to release to the study monitor.
4. Click **Release to Study Monitor** on the toolbar.
5. Select the study, patient group, and the dates the information should be available to the study monitor.
6. Click **Release**.

    - You can view release information in the Study Monitor Release Information section of the Research Snapshot and in the Study Monitor Releases for My Studies component on the Research Coordinator - My Studies dashboard.

> You can also use the **Actively Enrolled Patients** report on your dashboard to release patients. If you do not see either of these reports on your dashboard, click the dashboard title to search for them in the catalog.

Select multiple patients

You can select one or more patients to release to the study monitor. Below are some tips on how to multi-select patients.

Select multiple consecutive patients

1. Select the first patient in the list of patients you would like to release by single clicking on their row in the
   report.
2. With your mouse, hover over the last patient in the list of patients that you would like to release.
3. On the keyboard, hold down the **Shift** key and while it is still held down, single click on the last patient from the list of patients you would like to release.

    a. This will select all patients from the first and last clicks you performed.

Select multiple nonconsecutive patients

1. Select the first patient you would like to release by single-clicking on their row in the report.
2. For all subsequent patients you would like to release, hold down the **Ctrl** key and single-click the next patient you would like to release.
3. Keep the **Ctrl** key held down and repeat step 2 until you have selected all patients that will be released.

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Research Monitor workflow for data requests without RSH study record in EPIC

Follow the steps below for patients who do not yet have an RSH record.

1. Monitor will request access at the guidance of the Research Coordinator
    a. Monitor will enter an IRB study PRO number in the *IRB Study ID* field even though there is no RSH record in Epic
    b. Research Coordinator must advise Monitor to add comments on the request to make sure Provider Data Base (PDB) team knows they will not be attaching a study *"This study will not have an EPIC RSH record build and will follow alternate process"*
2. HIM Data Integrity team (Amy Dickmann) will review request and confirm with coordinator access is appropriate
    a. HIM Data Integrity team (Amy) may need to investigate with Interop or PDB team to see if they can find the Patient/Provider Group and/or if an active account exists
3. HIM Data Integrity team (Amy) will assign request to PDB team to build account and Patient/Provider Group
4. Upon Monitor receiving login information, monitor will notify CRC that they have access which triggers CRC to send email
5. CRC will request access to patients chart via email sent to ROI Team (FHROIResearch@froedtert.com) and will include IRB approval letter in communication
6. ROI team will open PGP and attach patient, from-to date, and comments on why they are granting access.
    a. HIM ROI team (Georgia/Damon) may reach out to HIM Data Integrity team (Amy) if unable to locate patient group
7. Ongoing requests for new patients or extended access to patients should be routed to ROI email distribution list (FHROIResearch@froedtert.com)

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Keep track of upcoming releases

To help you remember which patients have already been scheduled for release to the monitor, you can track your upcoming releases on the dashboard.

1. Go to the **Research Coordinator - My Studies** dashboard.
2. Locate the **Study Monitor Releases for My Studies** component.
3. To see details about your current or upcoming releases for a study, click **View Releases** in that study's row.

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