

October 2020 – Epic Update Companion Research Go-Live Date: 10/21/20

How to Use This Document

Content found in this booklet is subject to change as build is tested and finalized. Review the upgrade information on your **Learning Home Dashboard** in Epic or from the [Research](#) Epic Web page for the latest information.

This booklet contains changes that are specific to *Research*. Please be sure to review other Epic applications changes that may affect you in your role.

Please follow these guidelines:

- **Do not print this manual.**
 - For your convenience, this document contains hyperlinks to *Tip Sheets, Quick Start Guides and additional resources* when viewed electronically.
 - Only access this document from a Learning Home Dashboard in Epic or from the Epic Web page. These locations will hold the latest source of truth and will be updated with any changes from testing.
 - You can search the manual by selecting **CTRL + F** on your keyboard. This functionality will open a search window, allowing you to search on any keyword and jump directly to that section.

Practice with Try It Out

In this booklet, special *Try It Out* sections may be inserted throughout. If available, follow the steps below in order to practice in our Playground environment.

1. Click [here](#) to access a list of training users.
2. Login to **EPIC PLY2** environment with the appropriate training user.
3. Try out the functionality you find in the booklet by following the steps provided.

Please note: Not all functionality will be available to practice in the system.

Revision History

Please visit this page/section to see if there has been a revision since you last visited. Here we will note the revision date and a brief description of the change/update.

| <i>Date of Change</i> | <i>Description of Change/Update</i> |
|-----------------------|--|
| 9/8/2020 | New version updates |
| 10/28/2020 | Update to ENC linking and ROI patient group change |
| | |

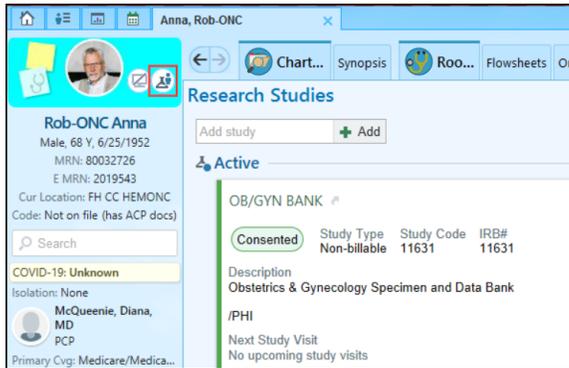
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Research Updates

Research Status – View Only

Epic users can view a patient’s research status via the Storyboard. This status is maintained by Clinical Research and OCRICC staff. The Epic research enrollment status will be replacing FYI Flags effective 10/21.



IMPORTANT!!

Reach out to clinical staff in your areas to be sure they understand that there will no longer be a FYI Flag for new research patient statuses as of 10/21

See Tip Sheet: [View Research Status in Epic](#)

Research Visit Types

Effective 10/21/20, updates to the following visit types will take place as part of the Epic Research Application go-live. Present-day scheduling workflows will remain the same.

- For those who use ERS/NRS today, little should change. Research staff will indicate the appropriate Visit Type to be utilized.
- Any future needs/use for those visit types will be tied to specific research projects and will be vetted as part of the operational planning done for such research projects through FH OCRICC.
 - Vetting of individual research occurs with the FH leadership of that department.

| Visit Type | Status on 10/21/20 | Definition |
|---|--------------------|---|
| New Research Patient-NRS [113] | Will remain | A patient who is new to the specific study/trial for which the appointment is being requested. This will be determined by research staff and communicated for scheduling purposes. |
| Established Research Patient - ERS [112] | Will remain | A patient with an active or follow-up status on the study/ clinical trial for which the visit is being requested. This will be determined by research staff and communicated for scheduling purposes. |
| Research Visit [18] | Retired | N/A – Appts with this visit type will be converted prior to go live. Communication will be sent to those impacted with further direction. |

Generic Research Providers

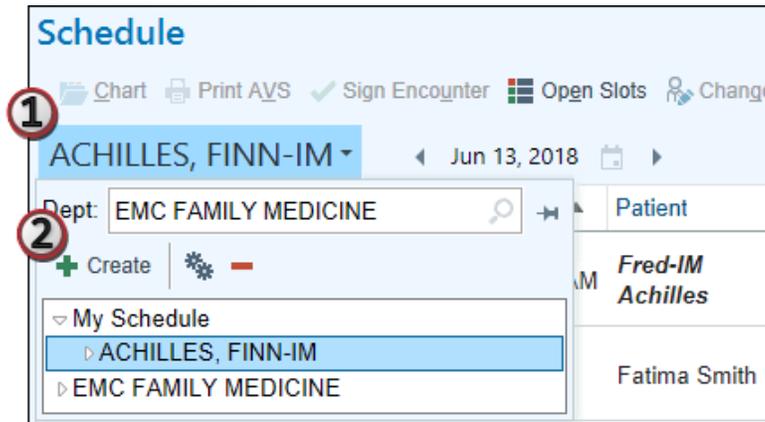
Research Visits will be scheduled to generic providers to reduce the need to add individuals as department providers or creating additional staff templates. This also allows flexibility for research staff when the individual who will be conducting the visit is unknown.

- Note: This change means that Research Visits will no longer be scheduled directly to the Research Coordinator or Research Nurse.

Tip: View Several Clinicians' Schedules at the Same Time

If you typically work with more than one clinician in a day, you can create a custom schedule to see all of their appointments at the same time.

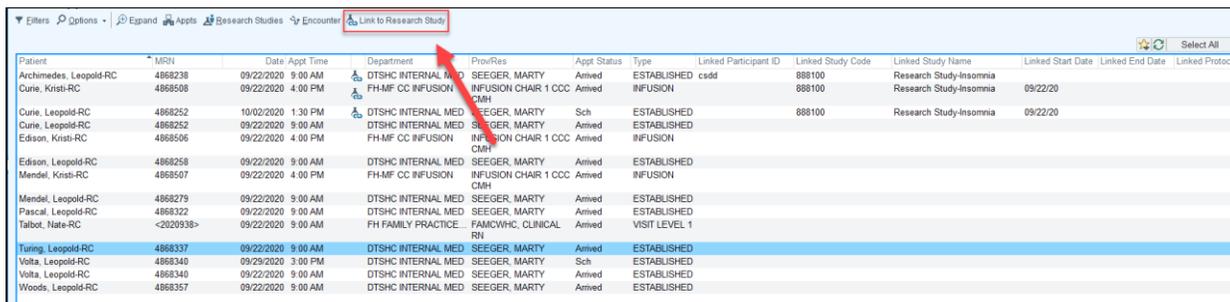
1. Click the header to the upper left of the schedule.
2. Select Create.



3. Enter a name for your schedule and select the **Configuration** tab.
4. Select the clinicians whose schedules you want to view and click **Add**.
 - Press **Ctrl** and click to select multiple clinicians.
 - Use the **Dept** field to choose clinicians in a different department, if necessary, or select **Provider [All Depts]**.
5. Click **Accept** when you are finished.

Encounter Linking

When a patient is associated with a study, they might have visits related to the study and some visits might just be for standard-of-care. We must associate the visits that are partially or fully study-related, so we know which visits are for which purpose. Encounter linking helps bring transparency related to research encounters. This can help during the billing review process, the study monitor review process, and HIM internal review before releasing to non-study requesters. **Note:** You can now select **multiple encounters**.

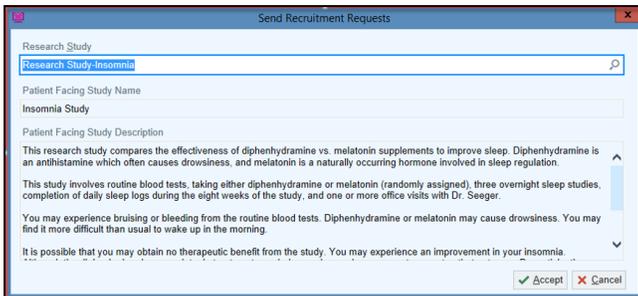


| Patient | MRN | Date | Appt Time | Department | Prov/Res | Appt Status | Type | Linked Participant ID | Linked Study Code | Linked Study Name | Linked Start Date | Linked End Date | Linked Protocol |
|------------------------|-----------|------------|-----------|--------------------|----------------------|-------------|---------------|-----------------------|-------------------|-------------------------|-------------------|-----------------|-----------------|
| Archimedes, Leopold-RC | 4868238 | 09/22/2020 | 9:00 AM | DTSHC INTERNAL MED | SEGER, MARTY | Amned | ESTABLISHED | csdd | 888100 | Research Study-Insomnia | | | |
| Cursi, Kristi-RC | 4868508 | 09/22/2020 | 4:00 PM | FH-MF CC INFUSION | INFUSION CHAIR 1 CCC | Amned | INFUSION | | 888100 | Research Study-Insomnia | 09/22/20 | | |
| Curie, Leopold-RC | 4868252 | 10/02/2020 | 1:30 PM | DTSHC INTERNAL MED | SEGER, MARTY | Sch | ESTABLISHED | | 888100 | Research Study-Insomnia | 09/22/20 | | |
| Curie, Leopold-RC | 4868252 | 09/22/2020 | 9:00 AM | DTSHC INTERNAL MED | SEGER, MARTY | Amned | ESTABLISHED | | | | | | |
| Edison, Kristi-RC | 4868506 | 09/22/2020 | 4:00 PM | FH-MF CC INFUSION | INFUSION CHAIR 1 CCC | Amned | INFUSION | | | | | | |
| Edison, Leopold-RC | 4868258 | 09/22/2020 | 9:00 AM | DTSHC INTERNAL MED | SEGER, MARTY | Amned | ESTABLISHED | | | | | | |
| Mendel, Kristi-RC | 4868507 | 09/22/2020 | 4:00 PM | FH-MF CC INFUSION | INFUSION CHAIR 1 CCC | Amned | INFUSION | | | | | | |
| Mendel, Leopold-RC | 4868279 | 09/22/2020 | 9:00 AM | DTSHC INTERNAL MED | SEGER, MARTY | Amned | ESTABLISHED | | | | | | |
| Pascal, Leopold-RC | 4868322 | 09/22/2020 | 9:00 AM | DTSHC INTERNAL MED | SEGER, MARTY | Amned | ESTABLISHED | | | | | | |
| Talbot, Nate-RC | <2020938> | 09/22/2020 | 9:00 AM | FH FAMILY PRACTICE | FAMCWHC, CLINICAL RN | Amned | VISIT LEVEL 1 | | | | | | |
| Turing, Leopold-RC | 4868337 | 09/22/2020 | 9:00 AM | DTSHC INTERNAL MED | SEGER, MARTY | Amned | ESTABLISHED | | | | | | |
| Volta, Leopold-RC | 4868340 | 09/29/2020 | 3:00 PM | DTSHC INTERNAL MED | SEGER, MARTY | Sch | ESTABLISHED | | | | | | |
| Volta, Leopold-RC | 4868340 | 09/22/2020 | 9:00 AM | DTSHC INTERNAL MED | SEGER, MARTY | Amned | ESTABLISHED | | | | | | |
| Woods, Leopold-RC | 4868357 | 09/22/2020 | 9:00 AM | DTSHC INTERNAL MED | SEGER, MARTY | Amned | ESTABLISHED | | | | | | |

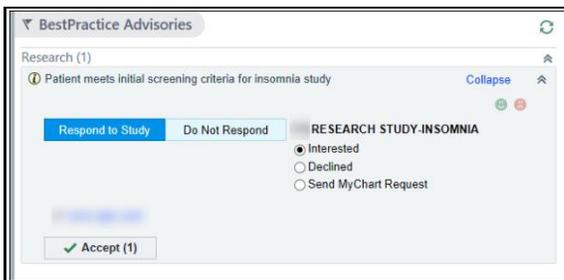
Recruiting – MyChart/Best Practice Advisories

Recruitment functionality will be rolled out to a limited number of studies to pilot. If your study is identified as one of those, you will be contacted regarding training materials.

Patients can be identified through dashboard reports allowing you to send a message to their MyChart portal.

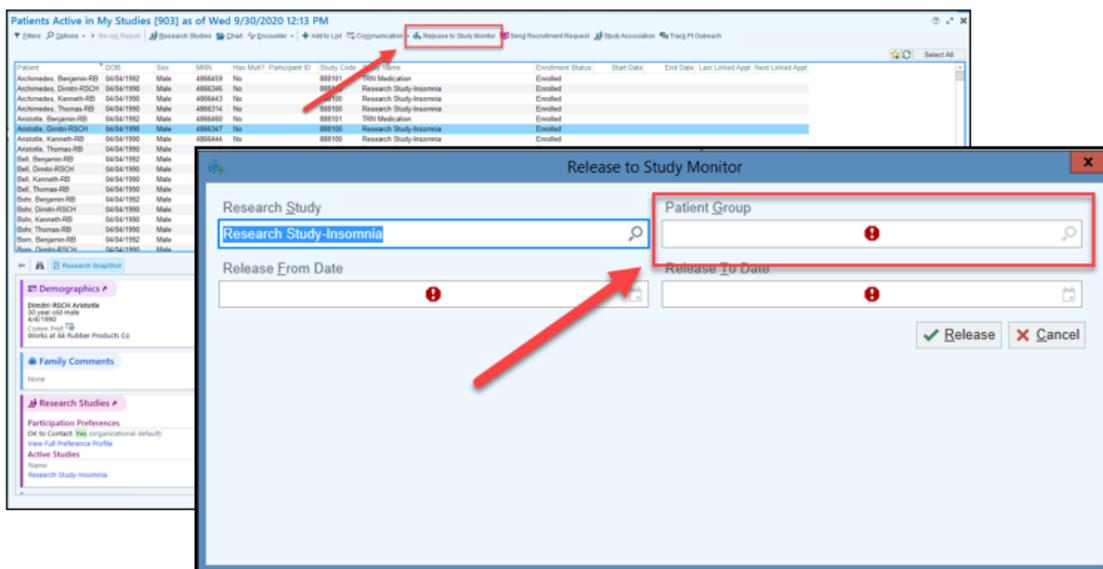


With institutional review board (IRB) or ethics board approval, you can use BestPractice Advisories as a point-of-care recruitment strategy to identify patients who might qualify for a research study.



Release of Information

Study coordinators can select a set of patients to release from a Reporting Workbench report. The study monitor can log in to EpicCare Link and access the released records for those patients. **Note:** You can only enter **individual monitors** in the Patient Group field.



Research Updates – PIs and Providers

Research Impact to PIs and Treating Providers

The Epic Research application will go-live across the system on 10/21/2020. Principal Investigators, Treating Physicians, and other interested providers will see additional study information within the patient record as well as within reporting.

- Day-to-day impact to providers will be minimal. Ordering, documentation, and scheduling workflows will remain essentially the same.

On 10/21/2020 You'll See:

- Linking activities to studies to clearly see what is research-related work in Epic:
 - Order-linking to studies by the Research Staff will go to providers for co-sign.
 - Encounter-linking to studies will be handled by Research Staff.
- Customized results notifications will be available to PIs, managed by Research Staff, and coordinated by study team members.
- Study patients' charts released to external study monitors for review via EpicCare link.

Limited Scope on 10/21/20:

- Adverse Event Documentation on all studies (CTCAE v 4.03 and 5.0) in Epic. Use of the Adverse Event workflow will be coordinated by the study team on a study-by-study basis at go-live.
- Recruitment BPAs: Two studies will pilot Research Recruitment BPAs on 10/21/20. Future roll-outs will be phased.
- Patient research preferences available in MyChart.
- MyChart Recruitment capabilities.

Future State:

- Slicer/Dicer will be available for discovery of study cohorts. Not currently IRB approved.

See Tip Sheet: [View Research Status in Epic](#)