# Epic Research Study Administration Fields

## Record Field Ownership

Below you will find the defined ownership for various fields in the Research Study Administration record within Epic.

- General Information
- Users and Providers/PI
- Studies Activity Set-up
- Report Groupers
- Study Calendar
- Amendments
- Automated Actions
- Billing Setup
- Recruitment

| Study Record Field | Studies Created in Epic | | Studies Created by Interface with OnCore | |
|---|---|---|---|---|
| | Who owns field? | Considerations | Who owns field? | Considerations |
| General Information | | | | |
| Study Name<br><br>(RSH .2) | OCRICC | OCRICC has standard convention for study name | Interface | The OnCore Short Title field will be sent |
| Study Code<br><br>(RSH 100) | OCRICC | Need to have an offline conversation to operationalize standardization. | Interface | The OnCore Protocol No. field will be sent |
| NCT #<br>NOTE: filled out only if applicable<br><br>(RSH 181) | OCRICC | Needs to be 8 digits | Interface | The OnCore NCT Number field will be sent |
| Study type<br>NOTE: this field is changing to clinicaltrials.gov designation of study type (interventional, observational, expanded access)<br><br>(RSH 115) | Study team | Study teams should choose from interventional, observational, and expanded access | Study team | Study teams should choose from interventional, observational, and expanded access |

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| Billing status<br><br>(RSH 50) | OCRICC | Cannot associate patients to the study until the study record has been activated | OCRICC | Cannot associate patients to the study until the study record has been activated |
| Study status<br><br>(RSH 300) | Study team | | Interface | The OnCore Protocol Status field will be sent |
| Description<br><br>(RSH 55) | Study team | | Interface | The OnCore Title field will be sent |
| IRB Approval #<br><br>(RSH 105) | Study team | | Interface | The OnCore IRB Approval field will be sent |
| IRB Approval Date<br><br>(RSH 106) | Study team | | Study team | |
| IRB Expiration date<br><br>(RSH 107) | Study team | | Study team | |
| <td colspan="5" align="center">Users and Providers/PI</td> |
| Principle Investigator<br><br>(RSH 130) | Study team | | Interface | The OnCore Principal Investigator (PI) field will be sent |
| Study Coordinators<br>NOTE: nurse coordinators and non-nurse coordinators<br><br>(RSH 110) | Study team | | Interface | The OnCore Protocol Staff will be sent |
| Other Providers<br>NOTE: This field will be used for co-Is and sub-Is<br><br>(RSH 140) | Study team | | Interface | The Protocol Staff (Sub-I and Co-I) will be sent |
| <td colspan="5" align="center">Studies Activity Set-up</td> |
| Enrollment Report<br><br>(RSH 350) | *Defaulted at go-live – no end user action* | | *Defaulted at go-live – no end user action* | |

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| Links<br>NOTE: Optional field for hyperlink in Research Studies activity in Epic and/or MyChart<br><br>(RSH 1300, 1310, 1320) | Study team | | Study team | |
| Adverse Events<br>NOTE: Users will select from CTCAE 4.03 or 5.0<br><br>(RSH 550) | Study team | | Study team | |
| **Report Groupers** | | | | |
| ROI Special Attention<br>NOTE: Policy for use of this field and workflow still in progress. Default this to Always OK to release, only make updates by exception | Study team | Determined via vetting process<br><br>Study teams will only need to set this if the default of "Always OK to release" is not appropriate | Study team | Determined via vetting process<br><br>Study teams will only need to set this if the default of "Always OK to release" is not appropriate |
| Special Billing Handling<br>NOTE: This field is used to indicate when a study doesn't have any study charges in place of Study type | OCRICC | For Froedtert facility services | OCRICC | For Froedtert facility services |
| OnCore Protocol Type | N/A | | Interface | The OnCore Protocol Type field will be sent |
| Split Claim<br>NOTE: filled out only if applicable | OCRICC | For Froedtert facility services | OCRICC | For Froedtert facility services |
| Beacon Amendment Report Impact<br>NOTE: filled out only if applicable | N/A | | Beacon analyst team | |
| **Study Calendar** | | | | |
| Study Branches<br><br>(RSH 801, 802) | Study team | | Interface | The OnCore Protocol Arm Description + Level Description will be sent |

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| Protocols<br>NOTE: This field is used for Beacon protocols and research billing protocols<br><br>(RSH 501, 502, 503) | N/A | | Beacon analyst team owns Beacon protocol | |
| Amendments | | | | |
| Amendments<br>NOTE: This is to track amendments that impact the Beacon protocol and e-signatures. Only Beacon protocols are in scope for the Oct, 2020 go-live.<br><br>(RSH 1800 - 1809) | N/A | | Beacon analyst team owns for impact to Beacon protocols | |
| Automated Actions | | | | |
| Automated Actions<br><br><br><br><br><br>(RSH 540, 542) | Study team | Opportunity for study team ownership of ADT event and appointment notifications if default needs to be overwritten as well as the procedure result notification | Beacon analyst owns the protocol-related notification<br><br>Study team | Opportunity for study team ownership of ADT event and appointment notifications if default needs to be overwritten as well as the procedure result notification<br><br>For oncology studies, amendment banner, amendment – no changes, and disallowed protocol notifications must be specified |
| Billing Setup | | | | |
| Guarantor Type<br><br>(RSH 601) | *Defaulted at go-live – no end user action* | | *Defaulted at go-live – no end user action* | |
| HB Fee Schedule<br><br>(RSH 80) | *Defaulted at go-live – no end user action* | | *Defaulted at go-live – no end user action* | |
| HB Fee Schedule Usage<br><br>(RSH 81) | *Defaulted at go-live – no end user action* | | *Defaulted at go-live – no end user action* | |

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| PB Pricing Contract<br><br>(RSH 602) | *Defaulted at go-live – no end user action* | | *Defaulted at go-live – no end user action* | |
| Service Area(s)<br><br>(RSH 65) | OCRICC | | OCRICC | |

| Recruitment | | | | |
|---|---|---|---|---|
| Patient-facing Name<br><br>(RSH 700) | Study team | Make sure that this makes sense for long term ownership – study team will need to make sure to include this recruitment method in IRB application prior to using this functionality in Epic | Study team | Make sure that this makes sense for long term ownership – study team will need to make sure to include this recruitment method in IRB application prior to using this functionality in Epic |
| Patient-facing Description<br>NOTE: The description needs to be built out in an Epic SmartText to be plugged in.<br><br>(RSH 710) | Study team | | Study team | |
| Check box for Show to Associated Patients in MyChart<br><br>(RSH 765) | Study team | | Study team | |
| Check box for Send Recruitment Requests<br><br>(RSH 760) | Study team | | Study team | |
| MyChart Notification Configuration Fields<br><br>(RSH 720, 721, 722, 730, 740, 741, 742, 750) | Study team | | Study team | |
| Provider Approval Configuration<br>NOTE: Only filled out if applicable.<br><br>(RSH 770, 775, 780, 781) | Study team | | Study team | |