# Leveraging Epic for Research: Training Topics Overview

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# Patients and Providers are actively engaged with Epic Helping us bring research studies to all!

#### **Epic EHR**

- Our Epic EHR is a common element across all sites and clinics
- Our investment in the Epic EHR will grow
- Our goal is to bring clinical trials to all

#### MyMountSinai (Epic MyChart) website & app

- 1.86M total MyMountSinai accounts
- ~511k patients use MyMountSinai every month
- 68% of patients have an active MyChart account

# Epic Research features already available at MSHS

**Automatically process research-specific claims** 

Indicate an encounter as a research encounter

Notify research staff of research patient appointment/admission/demise

**Enable research billing review** 

Indicate an order as related to research

Associate oncology research studies with study protocols

Enable our practice advisories to identify potential research patients

Show current research studies in MyMountSinai

Patient opt in/out of research recruitment via MyMountSinai

Send MyMountSinai Research messages to recruit participants

2024 plans: raise awareness through announcements and training

# Research Study Record

- This is the foundation of Epic Research
- Research studies must be created in Epic in order to effectively use Research features
  - Alternative is labor intensive one off's



# Research Study Record

Recruitment
Tracking/
CTA

Research
Header EHR

Research Notification

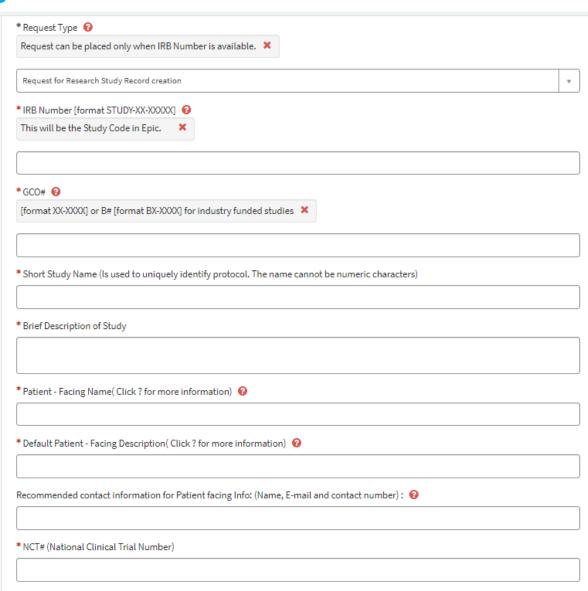
**Epic Research Study Administration** 



#### Creating the Research Study Record in Epic

- Before a patient is enrolled in a Research Study in Epic, a request to create the study record must be submitted in ServiceNow
  - Basic information is collected such as NCT#, IRB Assigned Study # and Principal Investigator
  - Use the same information in this form as the IRB submission portal
  - Note, if required info is not filled out such as PI and IRB number, the request will not be completed

<u>Epic Research Study Record (RSH) - Mount Sinai</u> <u>Health System (service-now.com)</u>





# Updating the Research Study Record in Epic

- The same ServiceNow form is be used for study updates and study closure
- Indicate any fields that need to be changed such as if study coordinators needs to be added
- When requesting the study to be closed in Epic, patients enrollments should be updated and there should be no outstanding bills
- It is important to make sure studies are updated in Epic

Request to create a research study protocol record. RESEARCH STUDY RECORD REQUEST \* Requested for 🔞 \* Contact Phone \* Life Number \* Email \* Request Type 🔞 Request can be placed only when IRB Number is available. X Existing Research Study Record update -- None --Request for Research Study Record creation Existing Research Study Record update Study Closure

Epic Research Study Record (RSH)

Request to create a research study protocol record.

<u>Epic Research Study Record (RSH) - Mount Sinai</u> <u>Health System (service-now.com)</u>

# **Epic Research Record Policy**

"All prospective human research studies with the billable services will have a research record (RSH) in Epic. This policy applies to all research studies conducted at Mount Sinai Health System"

- **Billable Services:** Services or procedures provided during a research study that are eligible for billing to patients, insurance, or grants.
- *Epic:* The EHR system used for managing patient records, scheduling, and billing.
- Research Study: A scientific study of nature that sometimes includes processes involved in health and
  disease. These studies may be related to new ways to screen, prevent, diagnose, and treat disease.



# Research Study Record Creation in Epic

#### **Current Process**

#### **Study team submits ServiceNow ticket**

- Epic team reviews the request to ensure that it has all the required information
- Builds the study
- Notify the study team once the study is available in Epic

#### **New Process**

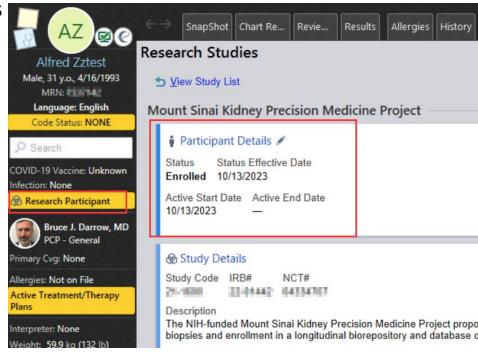
#### Leverage the data in OnCore

- ServiceNow ticket will no longer be needed for new study request or study closure
- ServiceNow will continue being used for changes in staff
- Central OnCore Team will build study records
- The list of new studies will be sent to Epic team daily
- Notify the study team once the study is available in Epic

# Epic for Research Features and Functionality

# **Enrolling a Patient in a Research Study**

- The patient's enrollment status and additional information is entered in the **Research Studies** activity to allow staff to track patients part of a study
  - Statuses manually updated by research staff:
    - Active Statuses: Enrolled, Consent Signed & Screening Process
    - Pre-Consent Statues: Waiting for consent, Identified, Interested & Eligible
- A Research banner appears for patients enrolled in research studies;
- Viewed from the Story Board banner



#### Indicate an Encounter as Research Encounter

Scheduling, Registration and Clinical Staff can link encounters to research studies:

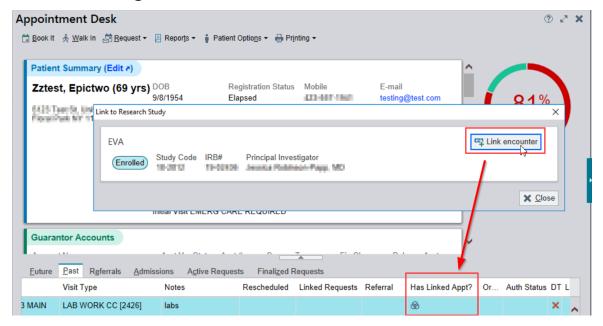
- Scheduling
   – via the Appointment Desk
- Registration via the Research Encounter Association

The association can be viewed in:

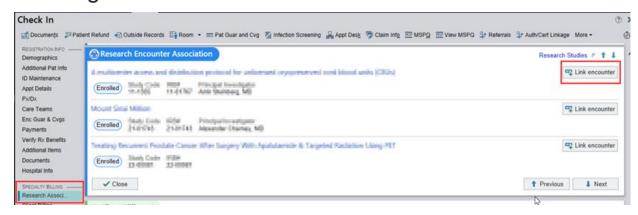
- Scheduling Activities
  - At sites with Epic Scheduling and Registration
- Chart Review

#### Indicate an Encounter as Research Encounter

#### Scheduling:



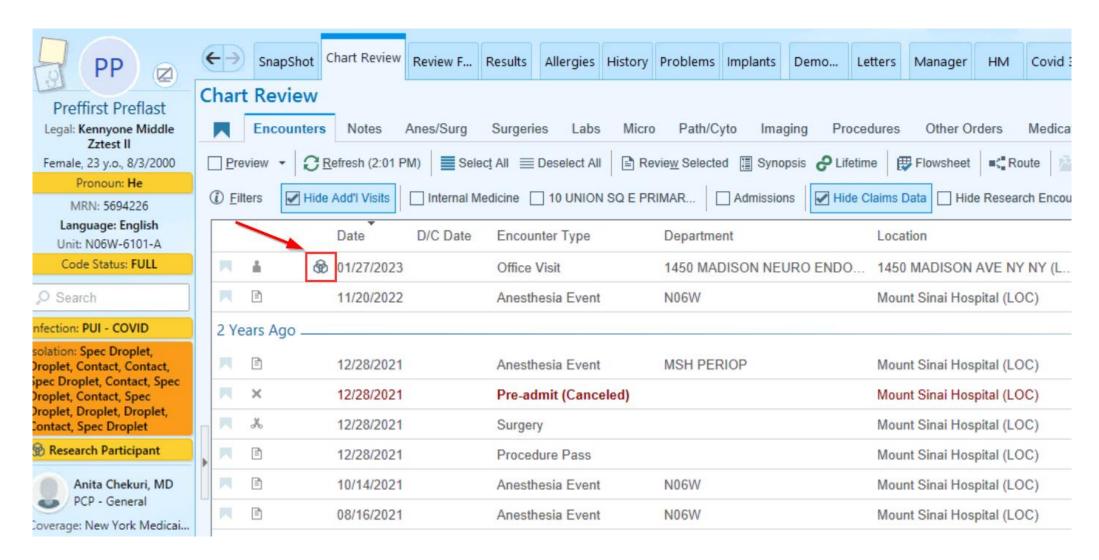
#### Registration:





## Research Linkage is visible in Chart Review

Q2 2024





# Research Billing Review – Process Change

#### **Current Process**

Workqueue based done at the service location

 Team reviewing the charges were not involved in the study

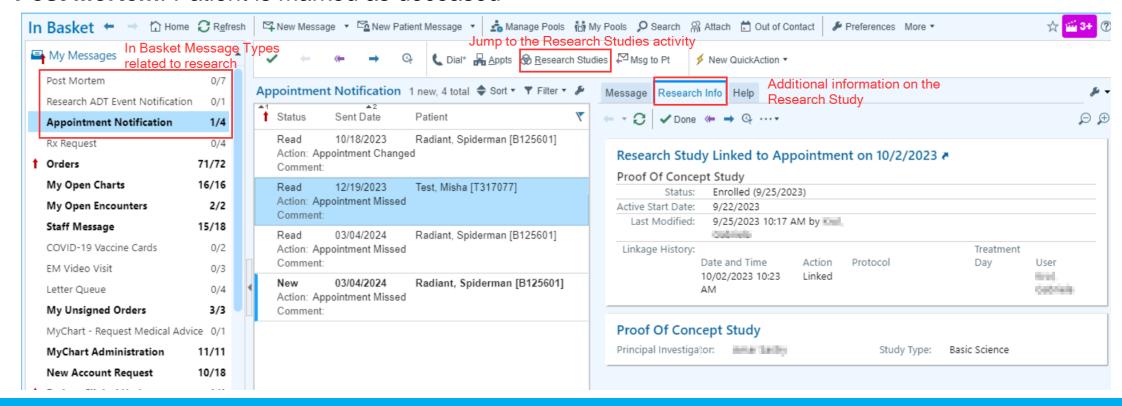
#### **New Process**

Report Based and will be owned by the study team

- Phased roll out
- Detailed Instructions with the tip sheet will be available soon

# Notify Research Staff of Research Patient Appointment/Admission/Demise

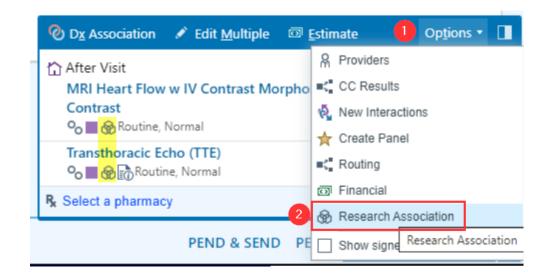
- Research staff (PI & Research Coordinators) listed in the Research study record receive automatic notifications via <u>Epic In-Basket</u> (Notifications will not be received via email)
  - Appointment Notification: Appointment is canceled, missed or changed
  - Research ADT Event Notification: Patient is admitted, transferred or discharged
  - Post Mortem: Patient is marked as deceased

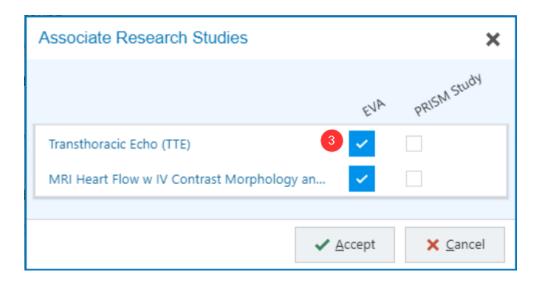




#### Indicate an Order as Related to Research

Q2 2024





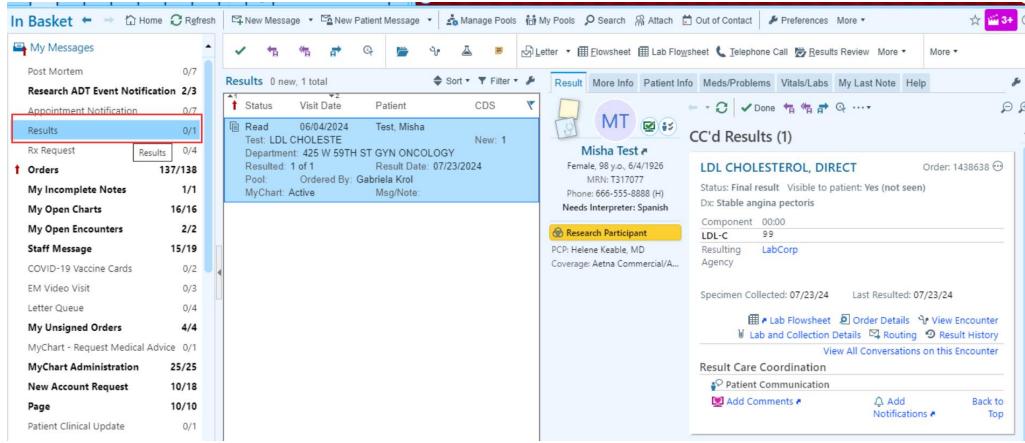
Available for all specialties now and anyone user who is placing research related orders [MDs, NPs, PAs, etc]

#### **Benefits**:

- Gives study staff, study monitors, and clinicians a clearer picture of why an order was placed.
  - Particularly helpful for research orders being placed during a clinical care visit.
- Enables study staff to track completion rates for study-related orders and compile results in a data set.
- Allows study staff to receive notifications of results related to their studies.
- Leads to more compliant and efficient billing



## Results Routing to Study Staff



#### **CC** options:

- PI and Coordinators
- Only PI
- Only Coordinators

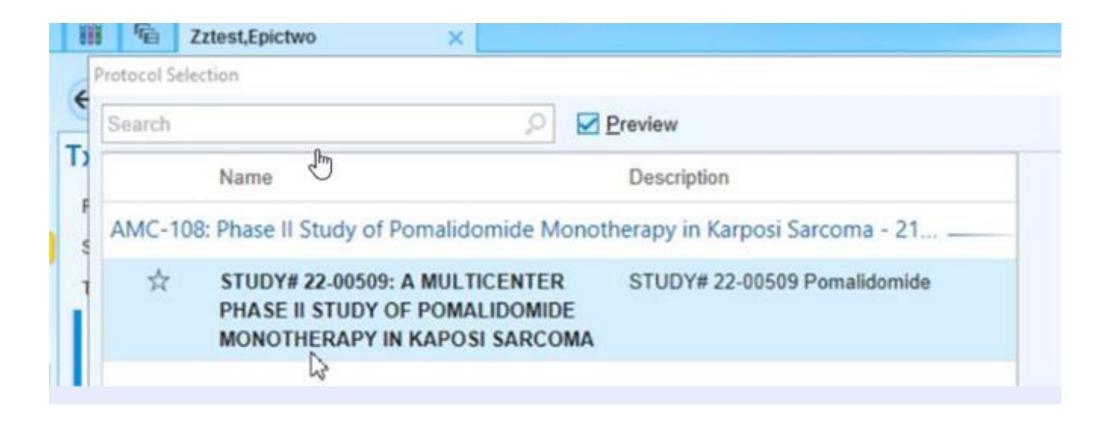
#### Requirements:

Relies on accurate study members being listed

Study team must having access to Mount Sinai Epic In Basket

# Associate Oncology Research Studies with Study Protocols

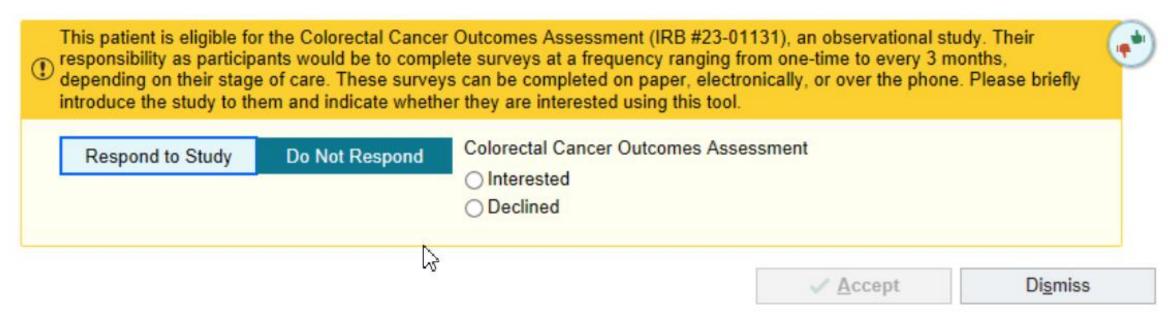
Can associate a research study with one or more Beacon treatment protocols



# Epic Research Accruement

#### Clinical Trial Recruitment Alerts at Point of Care

- Our Practice Advisories (OPAs) can appear in clinical workflows if a patient meets initial screening and eligibility criteria.
- Within the OPA, clinicians can:
  - Indicate a patient's interest
  - Ability to send an InBasket message



#### Clinical Trial Recruitment Alerts at Point of Care

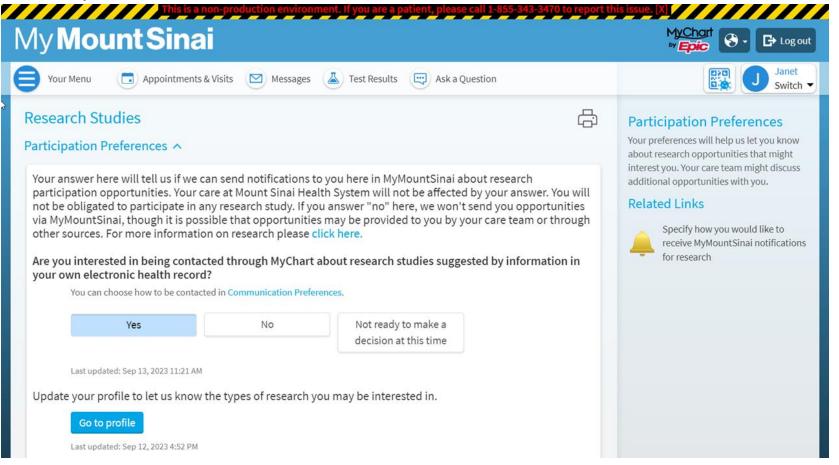
Our Practice Advisories (OPAs) work best the more discrete the better!

The following discrete information is collected during our intake:

- Exclusion and inclusion criteria can include the below:
  - ICD-10 codes
  - CPT codes
  - Medications
  - Procedures
  - Lab IDs
- List of Epic Departments the OPA should fire for
- Who the OPA should fire for [Physicians, Nurse Practitioner etc]

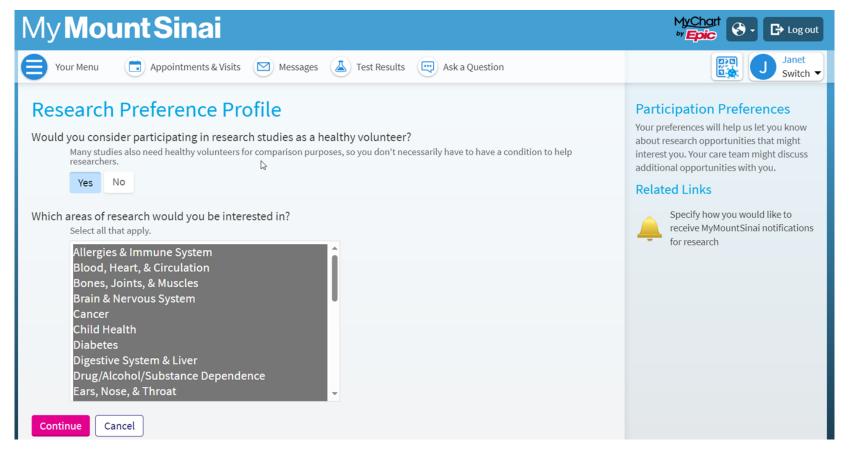
# Patient Opt In/Out of Research Recruitment via MyMountSinai

- Patients indicate whether they are willing to be contacted about research studies on MyMountSinai
  - A link is included for patients to learn more information: Mount Sinai Research



# Allow Patients to Complete a Research Preference Profile in MyChart

- Patients indicate which types of studies they might be interested in participating
- Responses can then be used for research recruitment outreach



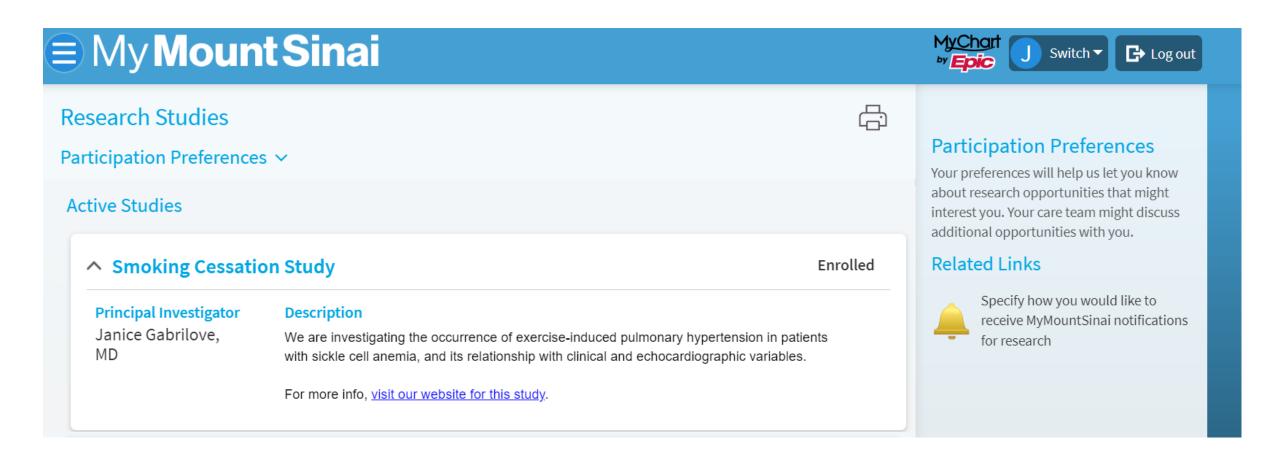
# List of 'Areas of Research' Currently Available

- Allergies & Immune System
- Blood, Heart, & Circulation
- Bones, Joints, & Muscles
- Brain & Nervous System
- Cancer
- Child Health
- Diabetes
- Digestive System & Liver
- Drug/Alcohol/Substance Dependence
- Ears, Nose, & Throat
- Endocrine System
- Eyes & Vision
- Food, Nutrition, & Weight
- Genetics
- Immune System

- Infectious Diseases
- Kidney & Urinary System
- Lungs & Breathing
- Mental/Behavioral Health
- Mouth & Teeth
- Newborn
- Pain Management
- Pregnancy & Neonatal
- Reproductive & Sexual Health
- Skin, Hair, & Nails
- Sleep Disorders
- Transplant
- Wellness & Lifestyle
- Women's Health

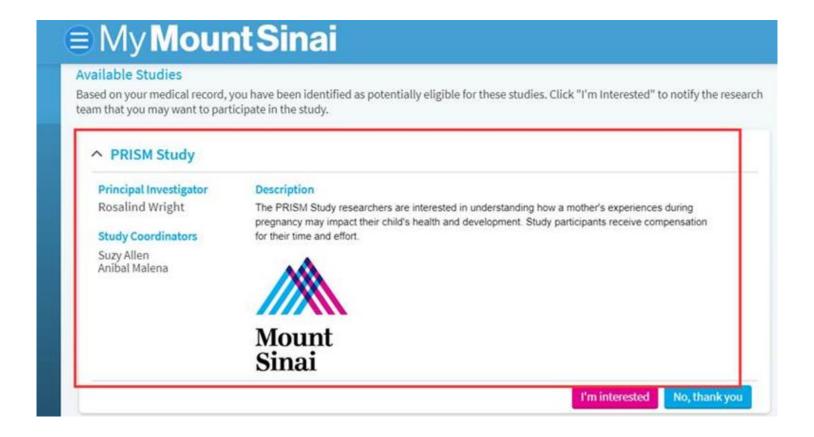
# Show Current Epic Research Studies in MyMountSinai

• Display information about research studies a patient is or has been involved in

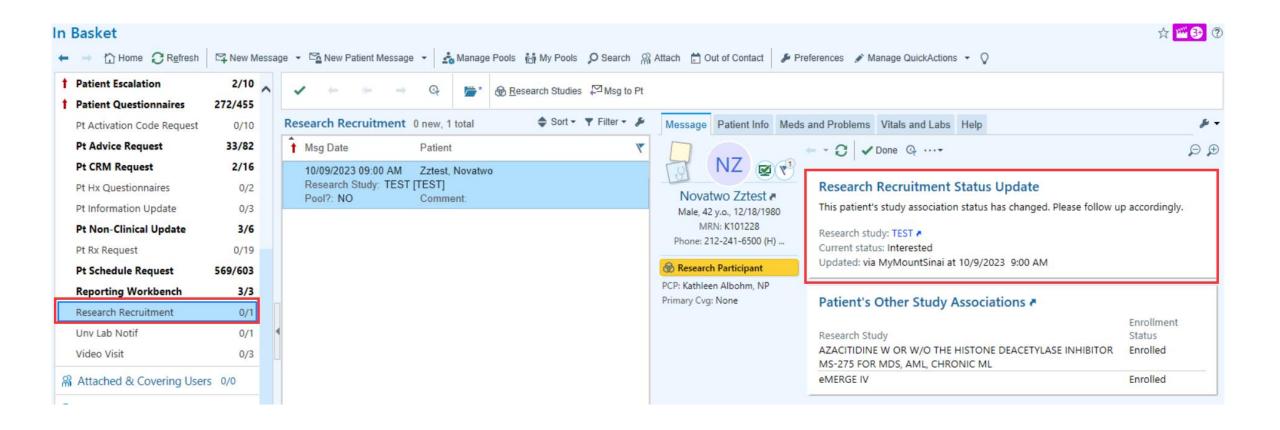


## Send MyMountSinai Research Messages to Recruit Participants

- This feature may not be appropriate for all studies
- Use MyChart to find out whether potentially eligible patients are interested in participating in a study
  - Patients receive an email/text when they have a research message

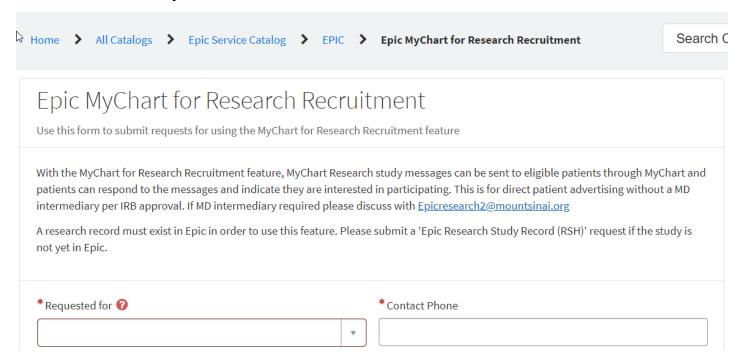


## In Basket Message for MyChart Recruitment



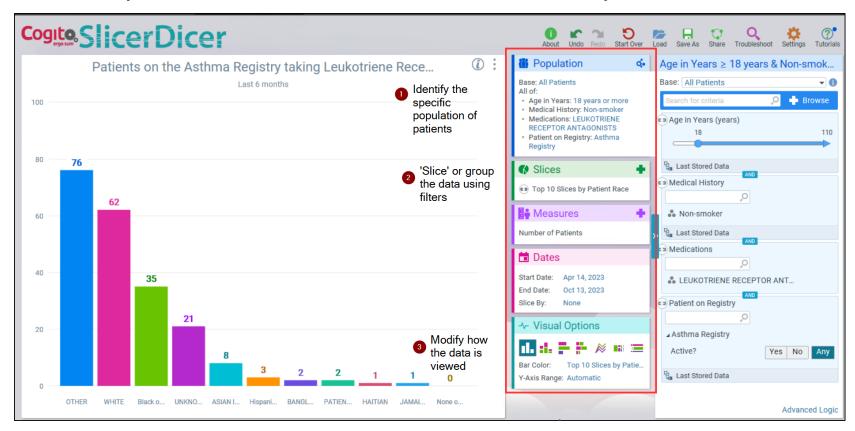
## Request Process for MyChart Recruitment Feature

- If you would like to use MyChart Recruitment for your study:
  - Submit a ServiceNow request: <u>Epic MyChart for Research Recruitment</u>
- Team will reach out to schedule an intake call
  - Team reviews if study is a good fit for the feature
- Call with our Epic Research Advisory Group for final approval
  - IRB approval is needed to use MyChart for Research Recruitment



#### SlicerDicer

- Deidentified data for research feasibility
- Appropriate security is needed to use SlicerDicer, CRCs can only view deidentified information

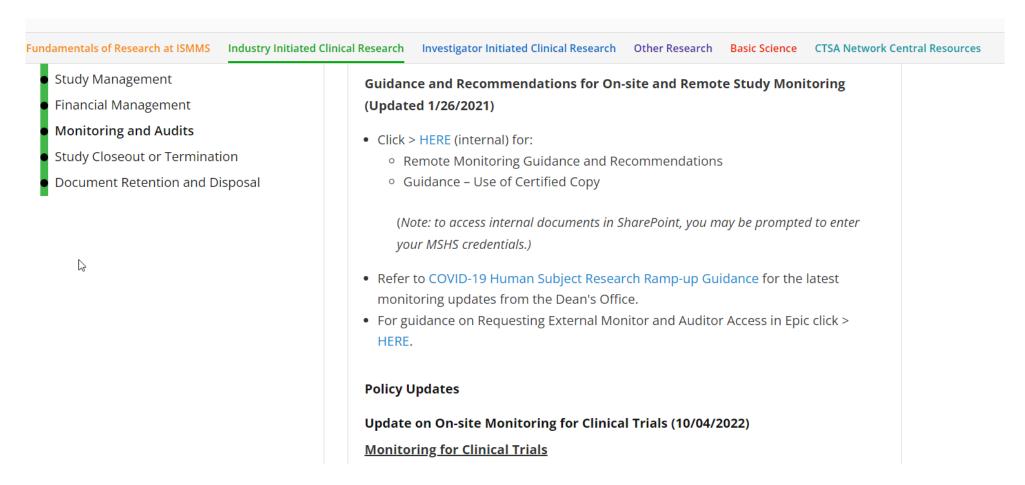


Mount Sinai Data Warehouse Request:

# **Epic Research Monitors**



## **Granting Access to Epic for Study Monitors**



• More information available on the Research Roadmap:

Monitoring and Audits | Research Roadmap (mssm.edu)

# **Training Overview**

#### **Current Training**

- 1 day Instructor Led training available in PEAK
- Zoom

## **Upcoming Training Date**

Thursday October 24th

#### Agenda:

ServiceNow Request for new Research Study

Enrolling a Patient to a Research Study

Scheduling an Existing Patient

Link Appt. to a Research Study

Cancelling/Rescheduling

New Patient Registration

Updating Demographics & Coverage

In-Basket messages

# Other Training Types

#### **Limited** CRC Training [scheduling/registration NOT INCLUDED]

eLearning Training

#### BMEII Radiant Research Coordinator training Add-on [placing ancillary orders]

	Scheduling/ Registration	Enrolling patients in Research Studies	Linking Encounters to Research	Radiant Ancillary Orders
Full CRC Training	<b>✓</b>	<b>√</b>	<b>✓</b>	X
Limited CRC Training	X	✓	<b>✓</b>	X
Radiant Research Coordinator Training	X	X	X	✓
View Only Training	X	X	X	X

## **Digital Concierge Service**

Digital Concierge Service is held **every Wednesday from 3:30 pm – 4:30 pm (Eastern Time) plus** an extra day (not Wednesday) once a month to accommodate users who cannot attend on Wednesdays
To attend to get help with any of the services below, people should register in advance <u>at this link.</u>

#### NEW: Epic for Research

• Leverage Epic for Research by utilizing features to recruit study participants, track patient enrollment, send consents via MyChart, receive notifications for research patient admissions and appointment changes, etc.

#### Minerva High Performance Computing (HPC)

Minerva is comprised of over 2 petaflops of computational power and 32 petabytes of storage

#### Data Ark Data Commons

Data Ark consists of public and Sinai-specific data sets located on Minerva

#### Mount Sinai Data Warehouse (MSDW) and Self-service Cohort Query Tools

• MSDW provides access to clinical and operational data collected from Mount Sinai's Epic Electronic Health Records

#### REDCap

 REDCap (Research Electronic Data Capture) is a secure, interactive web application for building and managing online surveys and databases

#### eRAP Electronic Data Capture

• eRAP is a secure, interactive web application for rapid database customization for single and multi-site studies

#### Library Resources and Services

• Use Library resources to find and manage evidence, data, and measurement instruments. Guidance on publication analysis and research impact, evidence synthesis, reference management, and data sharing.

#### DTP Academic Technology

DTP Academic Technology provides support for computer-related issues, software questions, and IT concerns.

#### DTP Cybersecurity

· Protect your data, laptop and other digital resources

# Thank You/Any Questions?

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