

# Leveraging Epic for Research: Training Topics Overview

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Icahn  
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**Mount**  
**Sinai**

# 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

- 1.96M total MyMountSinai accounts
- ~524k patients use MyMountSinai every month
- 70% 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

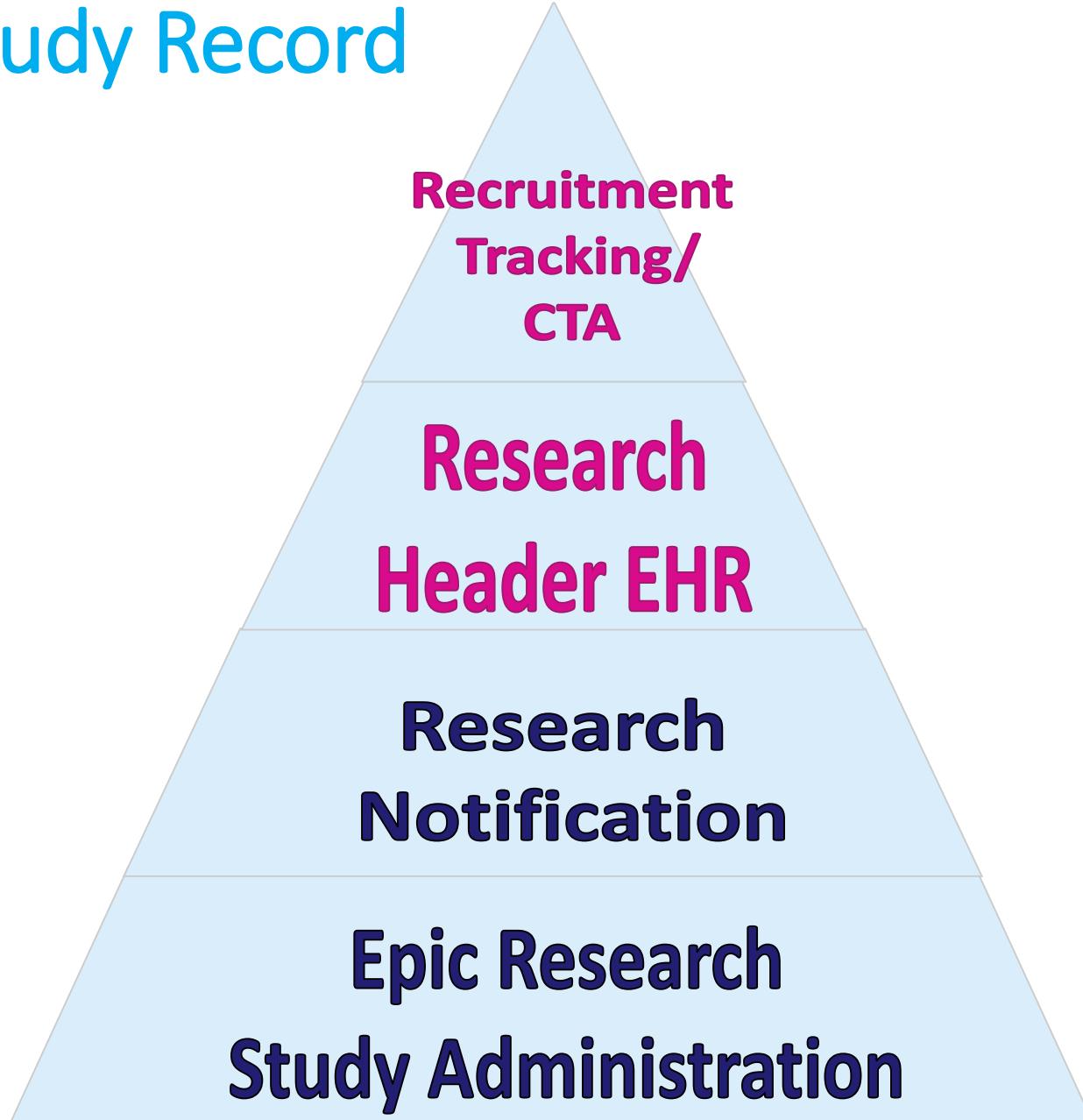
**2025 plans: raise awareness through announcements and training**

# 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



# Research Study Record Creation 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

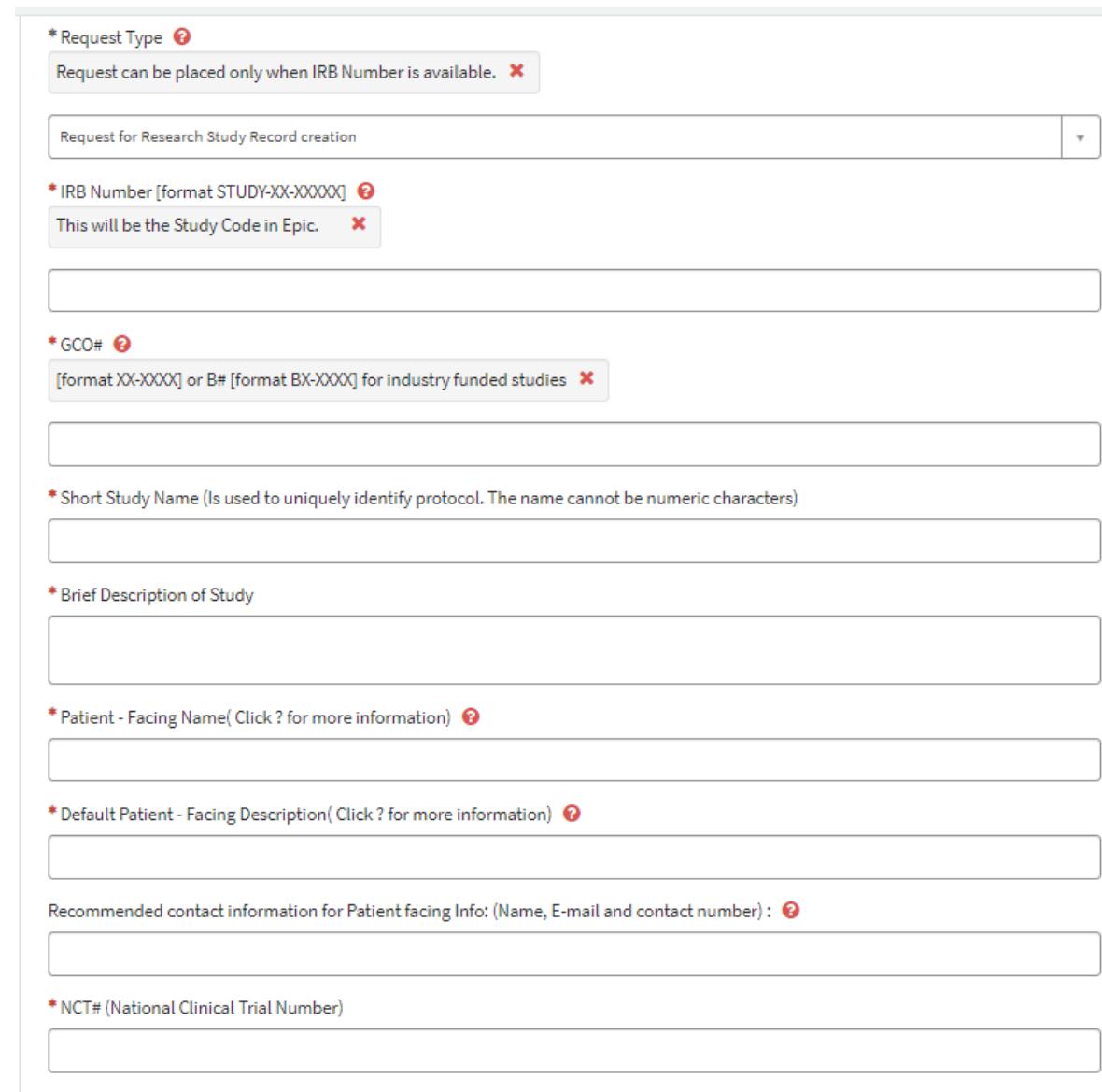
# Creating the Research Study Record in Epic

**\*\*This process is only for studies not in OnCore\*\***

**[For studies that do not meet billable service mandate and if the studies needs to created for recruitment purpose]**

- 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

[Epic Research Study Record \(RSH\) - Mount Sinai Health System \(service-now.com\)](#)



\* Request Type  Request can be placed only when IRB Number is available. 

Request for Research Study Record creation

\* IRB Number [format STUDY-XX-XXXX]  This will be the Study Code in Epic. 

\* GCO#  [format XX-XXXX] or B# [format BX-XXXX] for industry funded studies 

\* Short Study Name (Is used to uniquely identify protocol. The name cannot be numeric characters)

\* Brief Description of Study

\* Patient - Facing Name( Click ? for more information) 

\* Default Patient - Facing Description( Click ? for more information) 

Recommended contact information for Patient facing Info: (Name, E-mail and contact number): 

\* NCT# (National Clinical Trial Number)

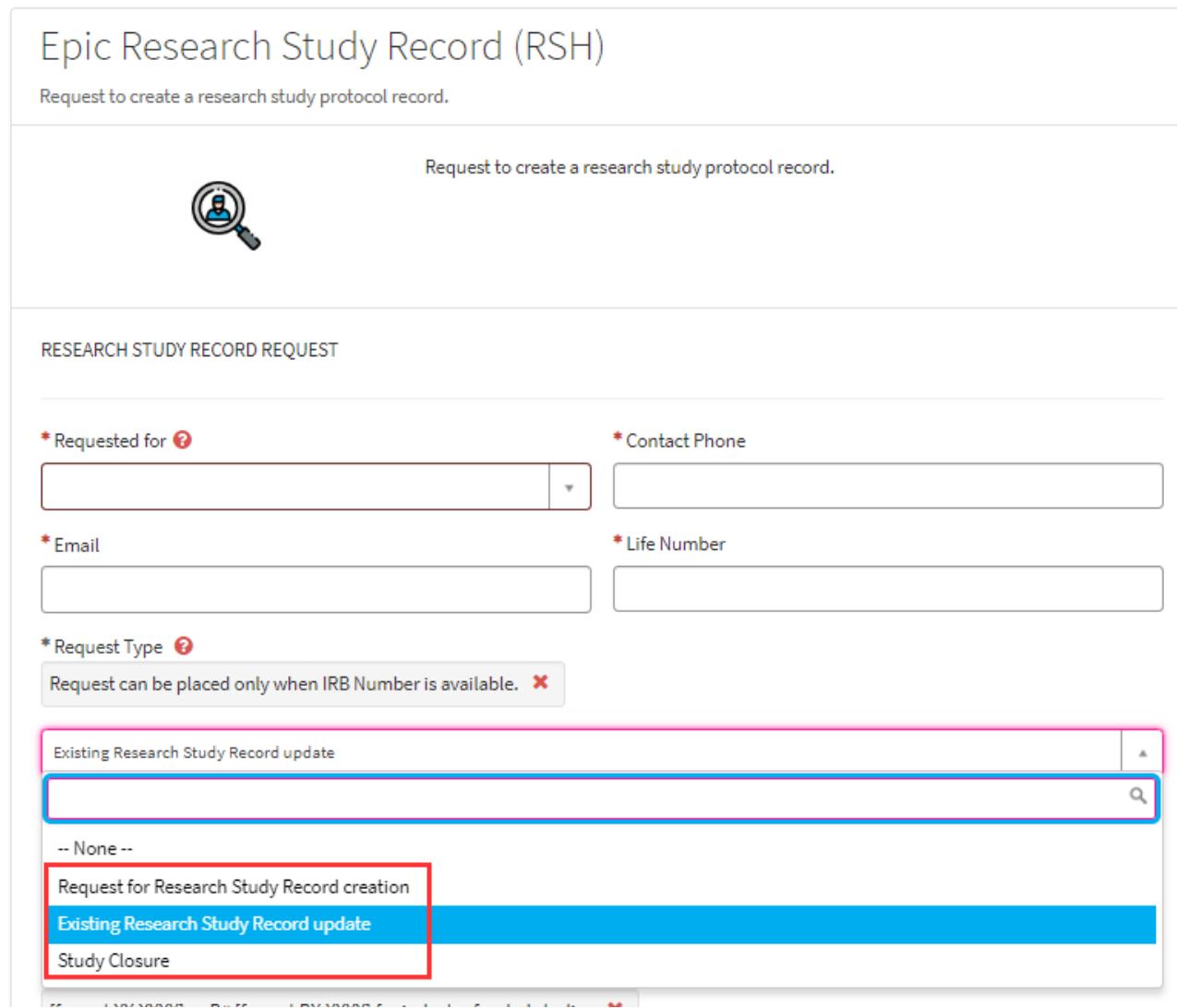
# Updating the Research Study Record in Epic

- 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

[Epic Research Study Record \(RSH\) - Mount Sinai Health System \(service-now.com\)](#)

Epic Research Study Record (RSH)  
Request to create a research study protocol record.

Request to create a research study protocol record.



# Epic Research Record Policy

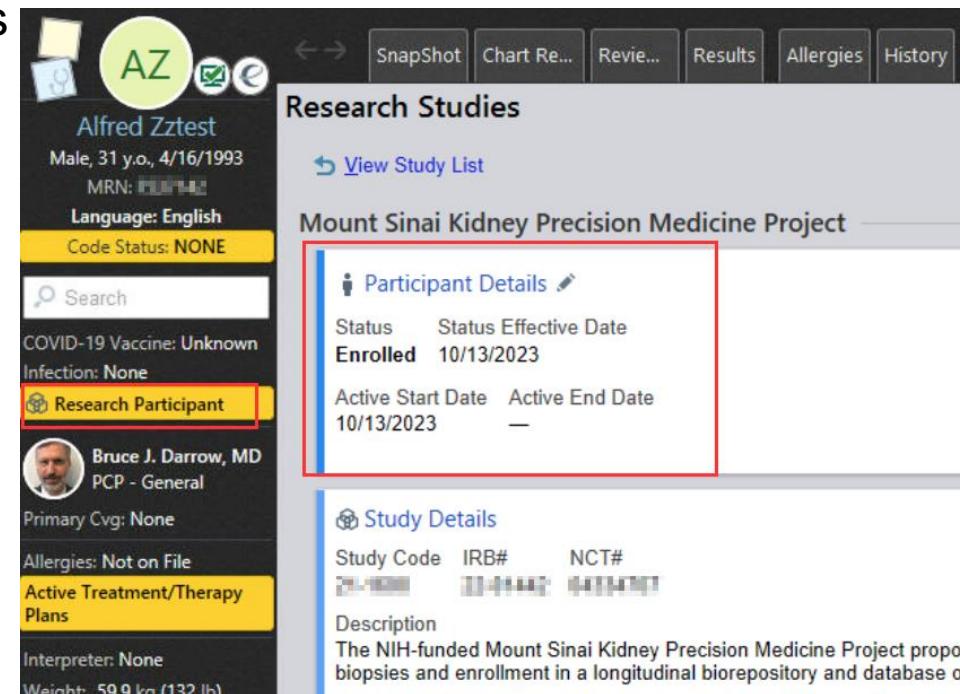
**“All prospective human research studies with the billable services will have a research record (RSH) in Epic at the minimum. This policy applies to all research studies conducted at Mount Sinai Health System”**

- ***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.

# 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 Statuses: 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:

The screenshot shows the 'Research Encounter Association' page. At the top, there are several navigation links: 'Check In', 'Documents', 'Patient Refund', 'Outside Records', 'Room', 'Pat Guar and Cvg', 'Infection Screening', 'Appt Desk', 'Claim Info', 'MSPQ', 'View MSPQ', 'Referrals', 'Auth/Cert Linkage', and 'More'. Below these are sections for 'REGISTRATION INFO' (Demographics, Additional Pat Info, ID Maintenance, Appt Details, Px/Dx, Care Teams, Enc Guar & Cvgs, Payments, Verify Rx Benefits, Additional Items, Documents, Hospital Info) and 'SPECIALTY BILLING' (Research Assoc.). The main content area displays three research studies with their details and a 'Link encounter' button for each. The first study is 'Multicenter access and distribution protocol for universal cryopreserved and blood units (CBUs)'. The second is 'MOUNT SINAI MILTON'. The third is 'Timing Recurrent Prostate Cancer After Surgery With Apolactamide-8 Targeted Radiation Using PET'. At the bottom, there are 'Previous' and 'Next' buttons, and a 'Close' button.

# Research Linkage is visible in Chart Review

PP

Preffirst Preflast  
Legal: Kennyone Middle  
Zztest II  
Female, 23 y.o., 8/3/2000  
Pronoun: He  
MRN: 5694226  
Language: English  
Unit N06W-6101-A  
Code Status: FULL  
Search  
Infection: PUI - COVID  
Isolation: Spec Droplet, Droplet, Contact, Contact, Spec Droplet, Contact, Spec Droplet, Contact, Spec Droplet, Contact, Spec Droplet, Droplet, Droplet, Contact, Spec Droplet  
Research Participant  
Anita Chekuri, MD  
PCP - General  
Coverage: New York Medicai...

← → SnapShot Chart Review Review F... Results Allergies History Problems Implants Demo... Letters Manager HM Covid 3

## Chart Review

Encounters Notes Anes/Surg Surgeries Labs Micro Path/Cyto Imaging Procedures Other Orders Medical

Preview Refresh (2:01 PM) Select All Deselect All Review Selected Synopsis Lifetime Flowsheet Route

Filters  Hide Add'l Visits  Internal Medicine  10 UNION SQ E PRIMAR...  Admissions  Hide Claims Data  Hide Research Encou

Date	D/C Date	Encounter Type	Department	Location
01/27/2023		Office Visit	1450 MADISON NEURO ENDO...	1450 MADISON AVE NY NY (L...
11/20/2022		Anesthesia Event	N06W	Mount Sinai Hospital (LOC)
<b>2 Years Ago</b>				
	12/28/2021	Anesthesia Event	MSH PERIOP	Mount Sinai Hospital (LOC)
	12/28/2021	<b>Pre-admit (Canceled)</b>		Mount Sinai Hospital (LOC)
	12/28/2021	Surgery		Mount Sinai Hospital (LOC)
	12/28/2021	Procedure Pass		Mount Sinai Hospital (LOC)
	10/14/2021	Anesthesia Event	N06W	Mount Sinai Hospital (LOC)
	08/16/2021	Anesthesia Event	N06W	Mount Sinai Hospital (LOC)

# Research Billing Review

## New Process

Report Based and will be owned by the study team

- Phased roll out
- Detailed Instructions with the tip sheet are available on the DTP Intranet

Home > Services > Systems and Applications Services > Epic > Documentation Guides > Hospital Billing

[About Epic](#) [Epic Documentation Guides](#) [Epic Additional Resources](#) [Clinical](#)

## Hospital Billing

### Contents

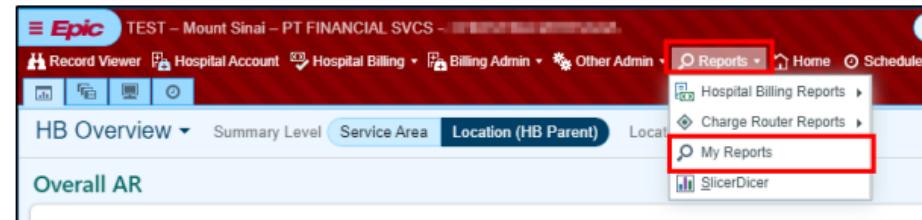
- Classroom Materials
- Biller Account & Claims
- Customer Service & Self-Pay
- Insurance Follow-Up & Denials
- Leadership
- Payment Poster
- Research Biller

## Research Billing Review

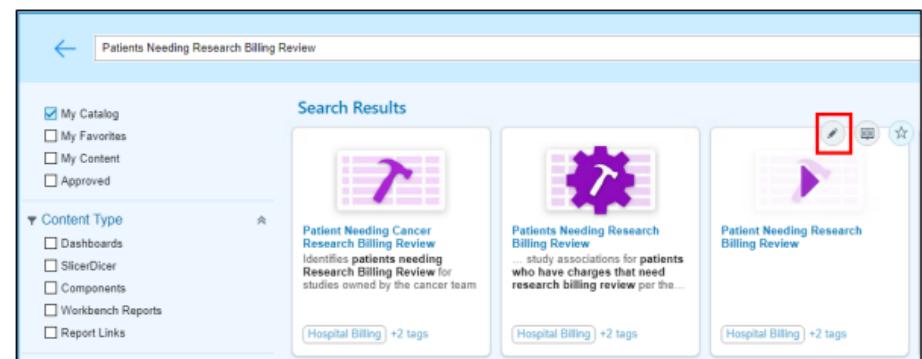
Patients that are enrolled in research study programs will need to have their encounter review. The review will be done by running a report within Epic.

*This review will determine whether or not a charge is research related and whether or not the charge should bill to the insurance or the study.*

1. Access the report by clicking Reports on the toolbar and selecting My Reports from the drop-down menu.



2. In the Analytics Catalog search for **Patients Needing Research Billing Review** and press enter.
3. Hover **Patients Needing Research Billing Review** and select the pencil icon to edit the report.



[Research Billing Review Through Reports Tip Sheet.pdf](#)

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

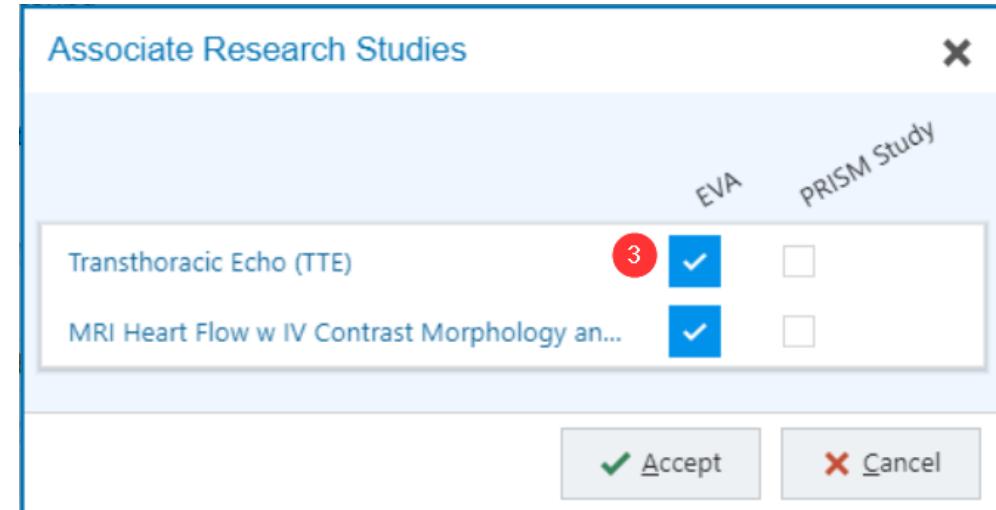
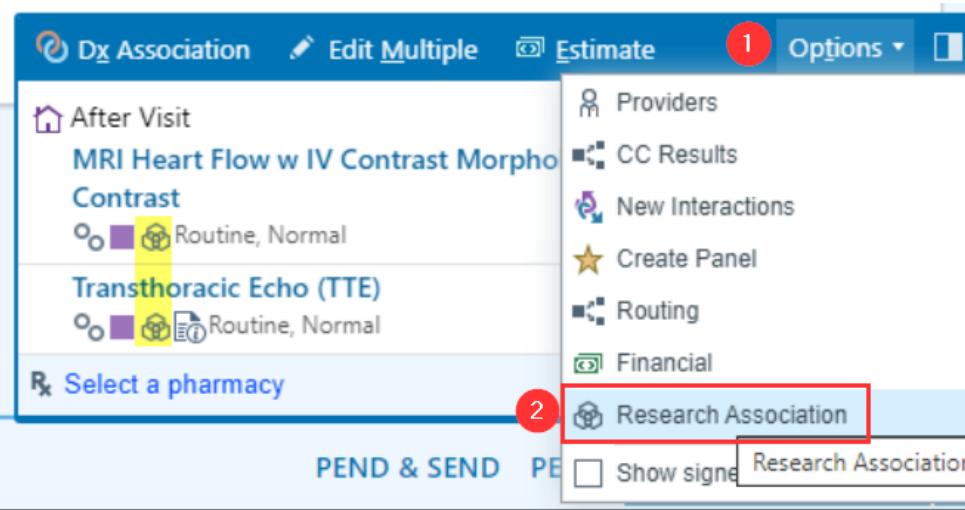
- Research staff (PI & Research Coordinators) listed in the Research study record receive automatic notifications via **Epic In-Basket** (Notifications will not be received via email)
  - **Appointment Notification:** Appointment is canceled, missed or changed
  - **Research ADT Event Notification:**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

The screenshot shows the Epic In-Basket interface with the following details:

- In Basket Message Types:** Related to research.
- Appointment Notification:** 1 new, 4 total.
- Appointment Notification Details:**
  - 1 new, 4 total
  - Status: Read
  - Sent Date: 10/18/2023
  - Patient: Radiant, Spiderman [B125601]
  - Action: Appointment Changed
  - Comment: (empty)
  - 1 new, 4 total
  - Status: Read
  - Sent Date: 12/19/2023
  - Patient: Test, Misha [T317077]
  - Action: Appointment Missed
  - Comment: (empty)
  - 1 new, 4 total
  - Status: Read
  - Sent Date: 03/04/2024
  - Patient: Radiant, Spiderman [B125601]
  - Action: Appointment Missed
  - Comment: (empty)
  - 1 new, 4 total
  - Status: New
  - Sent Date: 03/04/2024
  - Patient: Radiant, Spiderman [B125601]
  - Action: Appointment Missed
  - Comment: (empty)
- Research Info:** Additional information on the Research Study.
- Research Study Linked to Appointment on 10/2/2023:**
  - Proof Of Concept Study:**
    - Status: Enrolled (9/25/2023)
    - Active Start Date: 9/22/2023
    - Last Modified: 9/25/2023 10:17 AM by [redacted]
  - Linkage History:**

Date and Time	Action	Protocol	Treatment Day	User
10/02/2023 10:23 AM	Linked			[redacted]
- Proof Of Concept Study:**
  - Principal Investigator: [redacted]
  - Study Type: Basic Science

# Indicate an Order as Related to Research

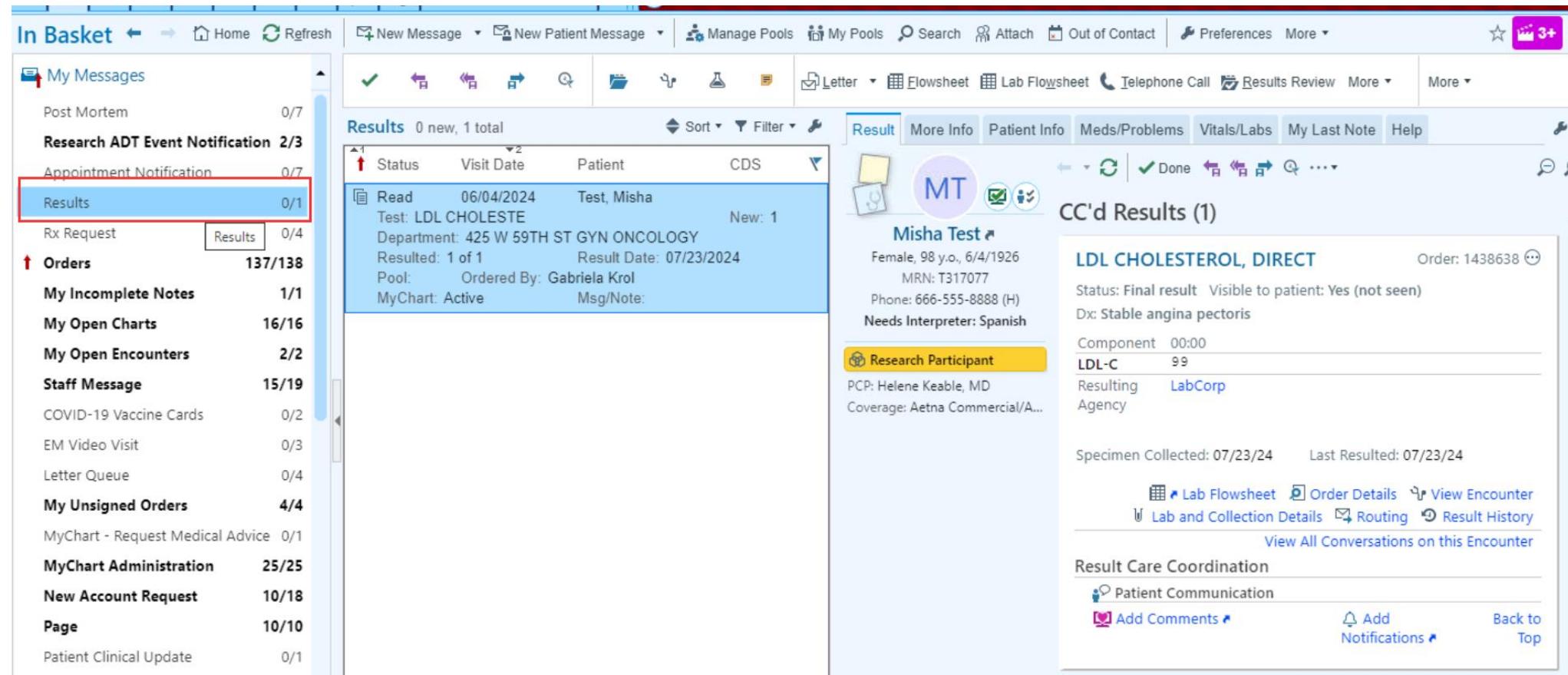


Available for all specialties now and anyone user who is placing research related orders [MDs, NPs, PAs, etc]

## 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



The screenshot shows the Mount Sinai Epic In Basket interface. The left sidebar lists various sections: My Messages, Research ADT Event Notification (2/3), Appointment Notification (0/7), Results (0/1, highlighted with a red box), Rx Request (0/4), Orders (137/138), My Incomplete Notes (1/1), My Open Charts (16/16), My Open Encounters (2/2), Staff Message (15/19), COVID-19 Vaccine Cards (0/2), EM Video Visit (0/3), Letter Queue (0/4), My Unsigned Orders (4/4), MyChart - Request Medical Advice (0/1), MyChart Administration (25/25), New Account Request (10/18), Page (10/10), and Patient Clinical Update (0/1). The main area displays a 'Results' list for 'Misha Test' with details: Test: LDL CHOLESTE, Department: 425 W 59TH ST GYN ONCOLOGY, Resulted: 1 of 1, Result Date: 07/23/2024, Pool: Ordered By: Gabriela Krol, MyChart: Active, and Msg/Note: . The result is labeled 'Read' with a status of '06/04/2024'. The right panel shows the detailed result for 'Misha Test' with a purple circular icon containing 'MT'. It includes patient information: Female, 98 y.o., 6/4/1926, MRN: T317077, Phone: 666-555-8888 (H), and 'Needs Interpreter: Spanish'. A 'Research Participant' badge is present. The result is for 'LDL CHOLESTEROL, DIRECT' with an order number of 1438638. The status is 'Final result' and 'Visible to patient: Yes (not seen)'. The dx is 'Stable angina pectoris'. The component is '00:00' and the LDL-C value is '99'. The result is from 'LabCorp' and was collected on 07/23/24. There are links for 'Lab Flowsheet', 'Order Details', 'View Encounter', 'Lab and Collection Details', 'Routing', 'Result History', 'View All Conversations on this Encounter', 'Patient Communication', 'Add Comments', 'Add Notifications', and 'Back to Top'.

## CC options:

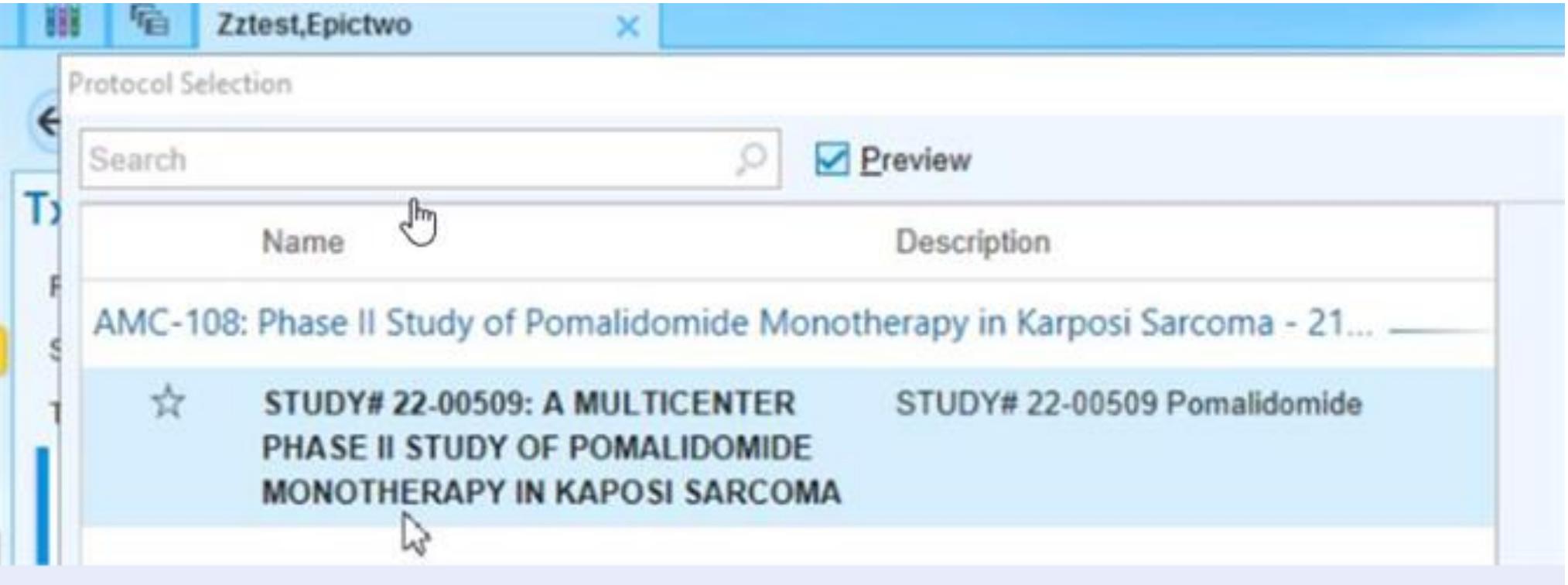
- PI and Coordinators
- Only PI
- Only Coordinators

## Requirements:

- Relies on accurate study members being listed
- Study team must have access to Mount Sinai Epic In Basket

## Associate Oncology Research Studies with Study Protocols

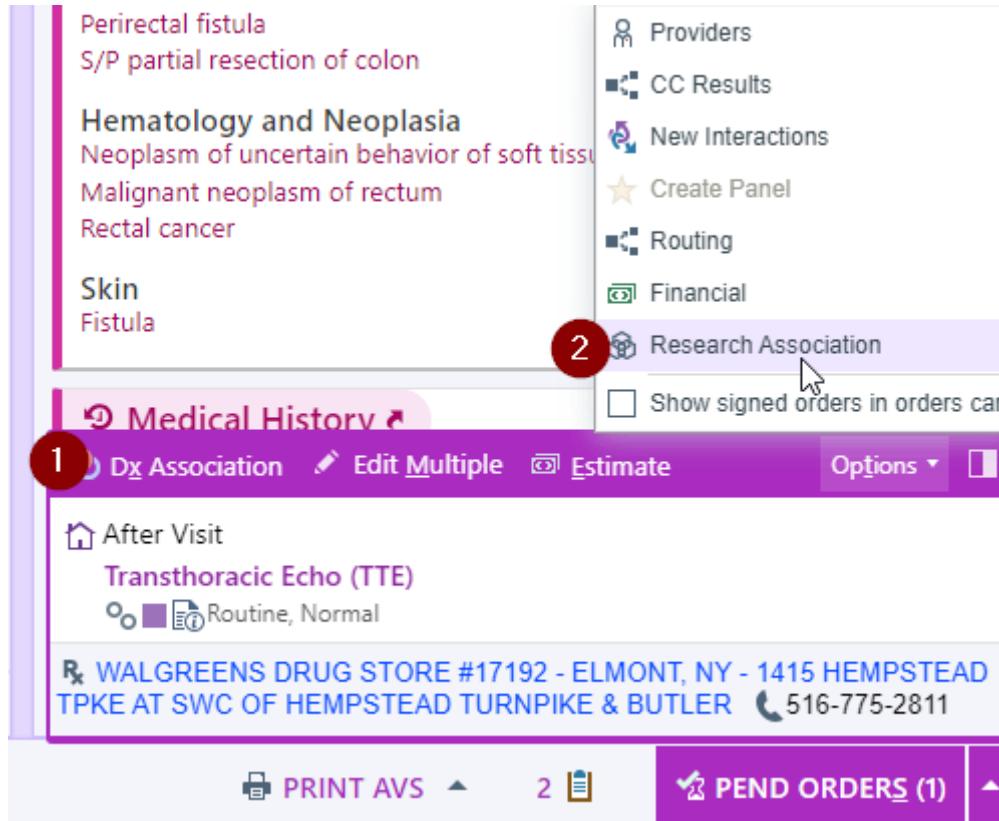
- Can associate a research study with one or more Beacon treatment protocols



The screenshot shows a software interface titled "Protocol Selection" with a blue header bar. The header bar includes a back arrow, a save icon, the text "Zztest,Epictwo", and a close button. Below the header is a search bar with a magnifying glass icon and a checked "Preview" checkbox. The main area is a table with two columns: "Name" and "Description". The first row shows a study name followed by an ellipsis. The second row is highlighted with a blue background and displays a star icon, the study name, and a detailed description. A cursor is visible over the second row's description text.

Name	Description
AMC-108: Phase II Study of Pomalidomide Monotherapy in Kaposi Sarcoma - 21...	STUDY# 22-00509: A MULTICENTER PHASE II STUDY OF POMALIDOMIDE MONOTHERAPY IN KAPOSI SARCOMA
★ STUDY# 22-00509: A MULTICENTER PHASE II STUDY OF POMALIDOMIDE MONOTHERAPY IN KAPOSI SARCOMA	STUDY# 22-00509 Pomalidomide

# Credentialed Research Coordinators Pend & Send Orders



Perirectal fistula  
S/P partial resection of colon

**Hematology and Neoplasia**  
Neoplasm of uncertain behavior of soft tissue  
Malignant neoplasm of rectum  
Rectal cancer

**Skin**  
Fistula

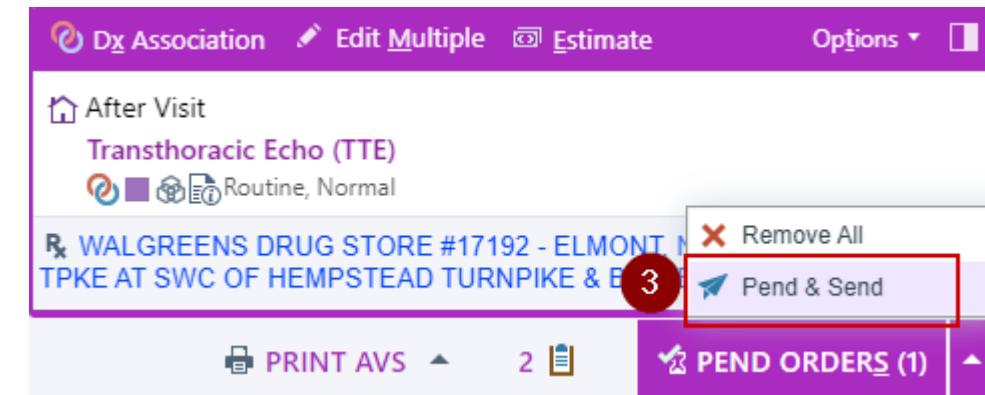
**Medical History**

1 Dx Association   2 Edit Multiple   3 Estimate   Options ▾

Providers  
CC Results  
New Interactions  
Create Panel  
Routing  
Financial  
Research Association

Show signed orders in orders cart

PRINT AVS   2 PEND ORDERS (1)



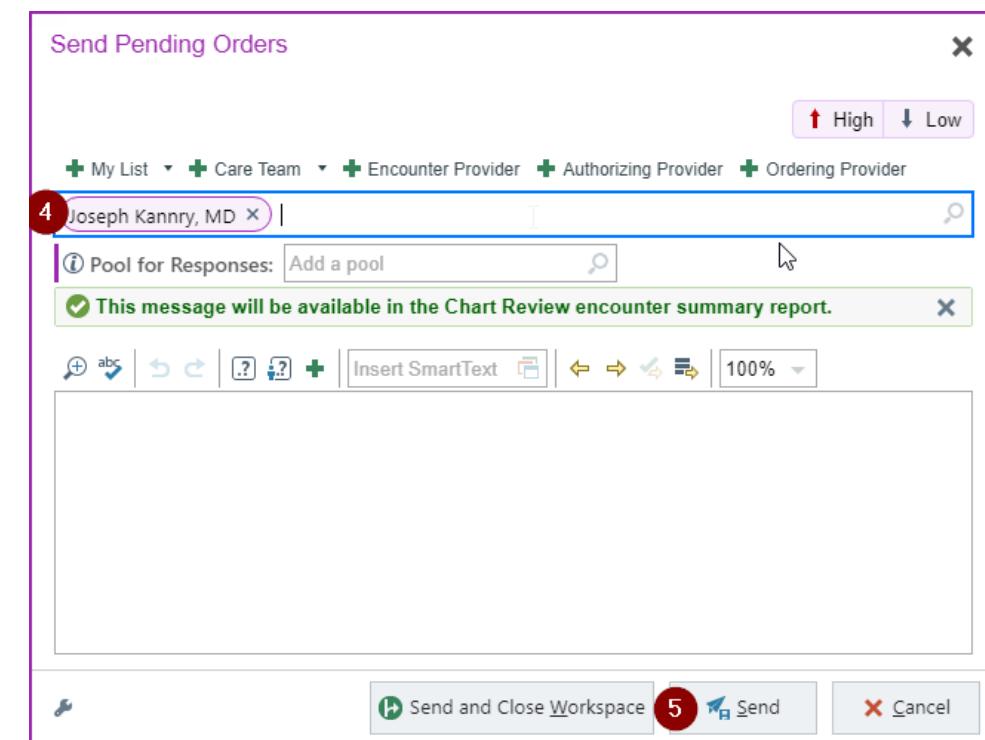
2 Dx Association   3 Edit Multiple   4 Estimate   Options ▾

After Visit  
Transthoracic Echo (TTE)  
Routine, Normal

Rx WALGREENS DRUG STORE #17192 - ELMONT, NY - 1415 HEMPSTEAD TPKE AT SWC OF HEMPSTEAD TURNPIKE & BUTLER

PRINT AVS   2 PEND ORDERS (1)

Remove All   Pend & Send



Send Pending Orders

High   Low

My List   Care Team   Encounter Provider   Authorizing Provider   Ordering Provider

4 Joseph Kannry, MD

Pool for Responses: Add a pool

This message will be available in the Chart Review encounter summary report.

abc   ↺ ↻   ? ?   +   Insert SmartText   100%

Send and Close Workspace   5 Send   Cancel

Coordinators will have the ability to Pend orders and send to credentialed user to sign the order

# 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

This patient is eligible for the Colorectal Cancer Outcomes Assessment (IRB #23-01131), an observational study. Their responsibility as participants would be to complete surveys at a frequency ranging from one-time to every 3 months, depending on their stage of care. These surveys can be completed on paper, electronically, or over the phone. Please briefly introduce the study to them and indicate whether they are interested using this tool.

! 

[Respond to Study](#) [Do Not Respond](#)

Colorectal Cancer Outcomes Assessment

Interested

Declined

 [Accept](#) [Dismiss](#)

## 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](#)

This is a non-production environment. If you are a patient, please call 1-855-343-3470 to report this issue. [X]

**MyMountSinai**

Your Menu Appointments & Visits Messages Test Results Ask a Question

MyChart by Epic Log out Janet Switch

**Research Studies**

**Participation Preferences** ^

Your answer here will tell us if we can send notifications to you here in MyMountSinai about research participation opportunities. Your care at Mount Sinai Health System will not be affected by your answer. You will not be obligated to participate in any research study. If you answer "no" here, we won't send you opportunities via MyMountSinai, though it is possible that opportunities may be provided to you by your care team or through other sources. For more information on research please [click here](#).

Are you interested in being contacted through MyChart about research studies suggested by information in your own electronic health record?

You can choose how to be contacted in [Communication Preferences](#).

**Yes** **No** **Not ready to make a decision at this time**

Last updated: Sep 13, 2023 11:21 AM

Update your profile to let us know the types of research you may be interested in.

**Go to profile**

Last updated: Sep 12, 2023 4:52 PM

**Participation Preferences**

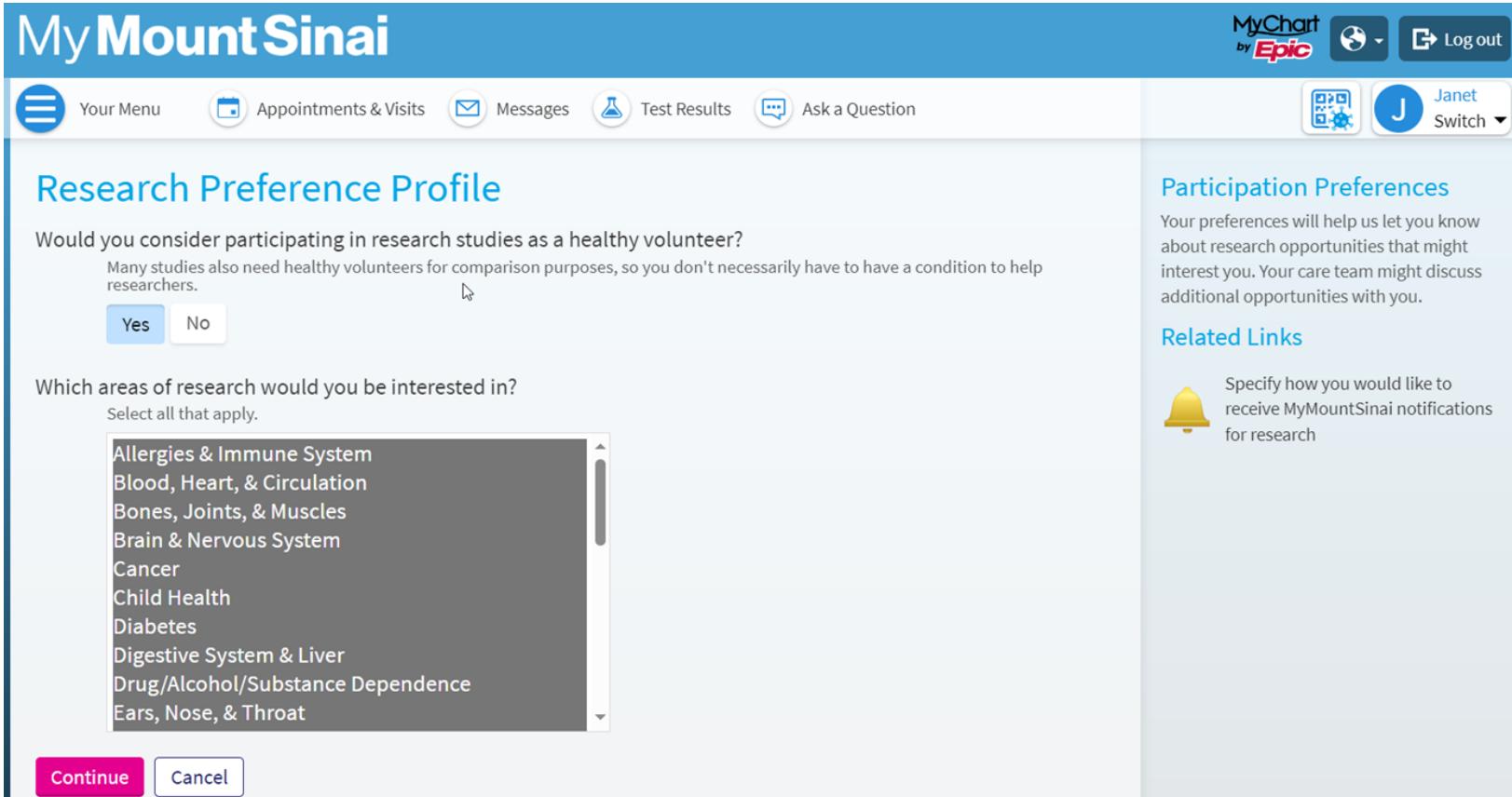
Your preferences will help us let you know about research opportunities that might interest you. Your care team might discuss additional opportunities with you.

**Related Links**

Specify how you would like to receive MyMountSinai notifications for 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



The screenshot shows the MyMountSinai MyChart interface. The top navigation bar includes links for Your Menu, Appointments & Visits, Messages, Test Results, and Ask a Question. On the right, there are icons for MyChart by Epic, a globe, and Log out, along with a user profile for Janet and a switch button.

The main content area is titled "Research Preference Profile". It asks, "Would you consider participating in research studies as a healthy volunteer?" and provides a note: "Many studies also need healthy volunteers for comparison purposes, so you don't necessarily have to have a condition to help researchers." Below this are "Yes" and "No" buttons.

The next section, "Which areas of research would you be interested in?", asks to "Select all that apply." A list of research areas is provided in a scrollable box:

- 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

At the bottom are "Continue" and "Cancel" buttons.

The right sidebar, titled "Participation Preferences", explains that preferences help identify research opportunities and discusses related links for notifications.

# 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

MyMountSinai

MyChart  
by Epic

J Switch ▾

Log out

Research Studies

Participation Preferences

Active Studies

Enrolled

Smoking Cessation Study

Principal Investigator: Janice Gabrilove, MD

Description: We are investigating the occurrence of exercise-induced pulmonary hypertension in patients with sickle cell anemia, and its relationship with clinical and echocardiographic variables.

For more info, [visit our website for this study.](#)

Participation Preferences

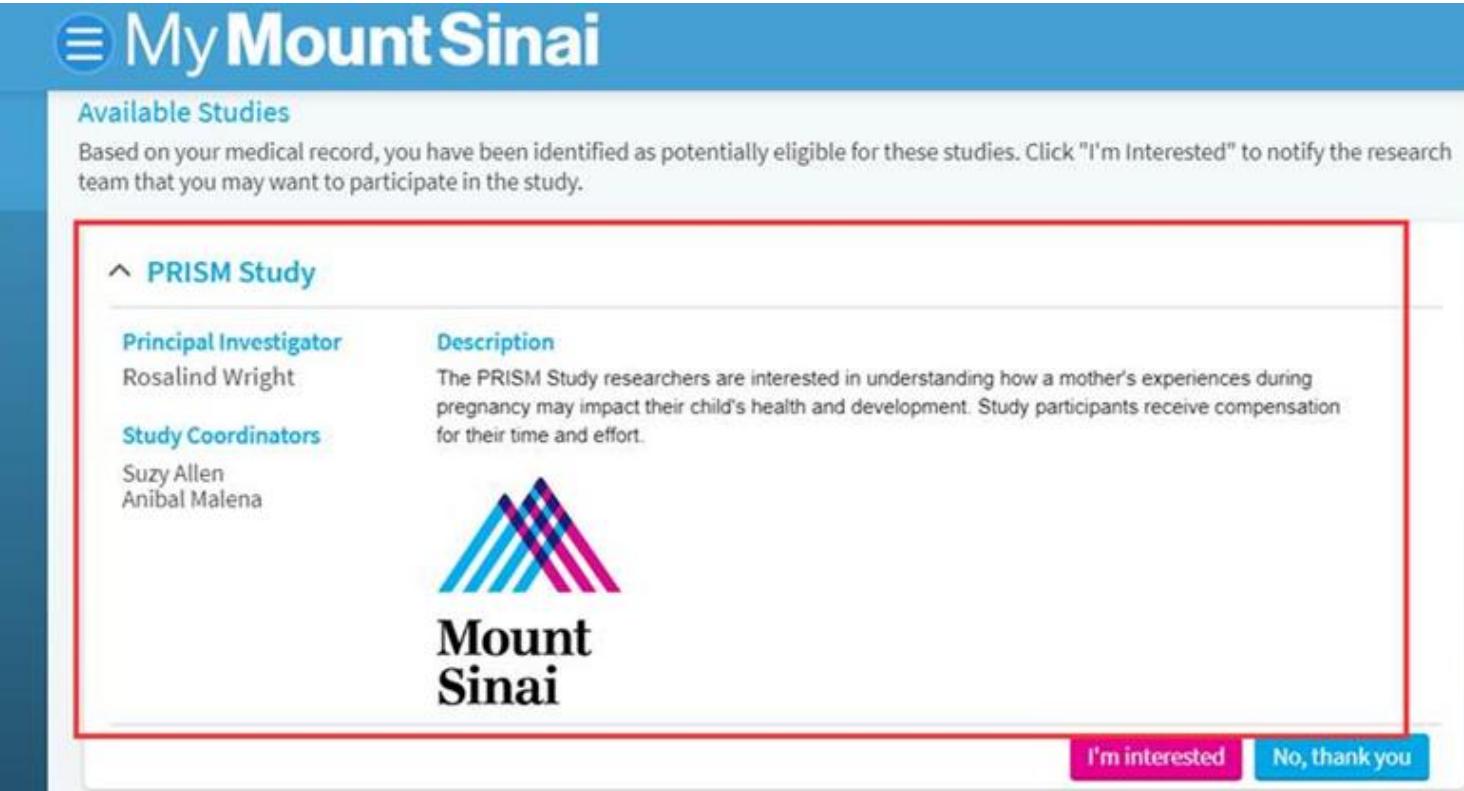
Your preferences will help us let you know about research opportunities that might interest you. Your care team might discuss additional opportunities with you.

Related Links

Specify how you would like to receive MyMountSinai notifications for research

# 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



The screenshot shows the MyMountSinai interface. At the top, there is a blue header bar with the 'MyMountSinai' logo. Below the header, a section titled 'Available Studies' is displayed. A message states: 'Based on your medical record, you have been identified as potentially eligible for these studies. Click "I'm Interested" to notify the research team that you may want to participate in the study.' A specific study entry for the 'PRISM Study' is highlighted with a red box. The study details are as follows:

Principal Investigator	Description
Rosalind Wright	The PRISM Study researchers are interested in understanding how a mother's experiences during pregnancy may impact their child's health and development. Study participants receive compensation for their time and effort.
Study Coordinators	
Suzy Allen Anibal Malena	

At the bottom of the highlighted box, there is a Mount Sinai logo consisting of three overlapping triangles in blue, green, and red, followed by the text 'Mount Sinai'.

At the very bottom of the page, there are two buttons: 'I'm interested' (in a pink box) and 'No, thank you' (in a blue box).

# In Basket Message for MyChart Recruitment

In Basket

Home Refresh New Message New Patient Message Manage Pools My Pools Search Attach Out of Contact Preferences Manage QuickActions

Patient Escalation 2/10  
Patient Questionnaires 272/455  
Pt Activation Code Request 0/10  
Pt Advice Request 33/82  
Pt CRM Request 2/16  
Pt Hx Questionnaires 0/2  
Pt Information Update 0/3  
Pt Non-Clinical Update 3/6  
Pt Rx Request 0/19  
Pt Schedule Request 569/603  
Reporting Workbench 3/3  
Research Recruitment 0/1  
Unv Lab Notif 0/1  
Video Visit 0/3  
Attached & Covering Users 0/0

Research Recruitment 0 new, 1 total

Novatwo Zztest, Male, 42 y.o., 12/18/1980, MRN: K101228, Phone: 212-241-6500 (H) ...

Research Participant PCP: Kathleen Albohm, NP, Primary Cvg: None

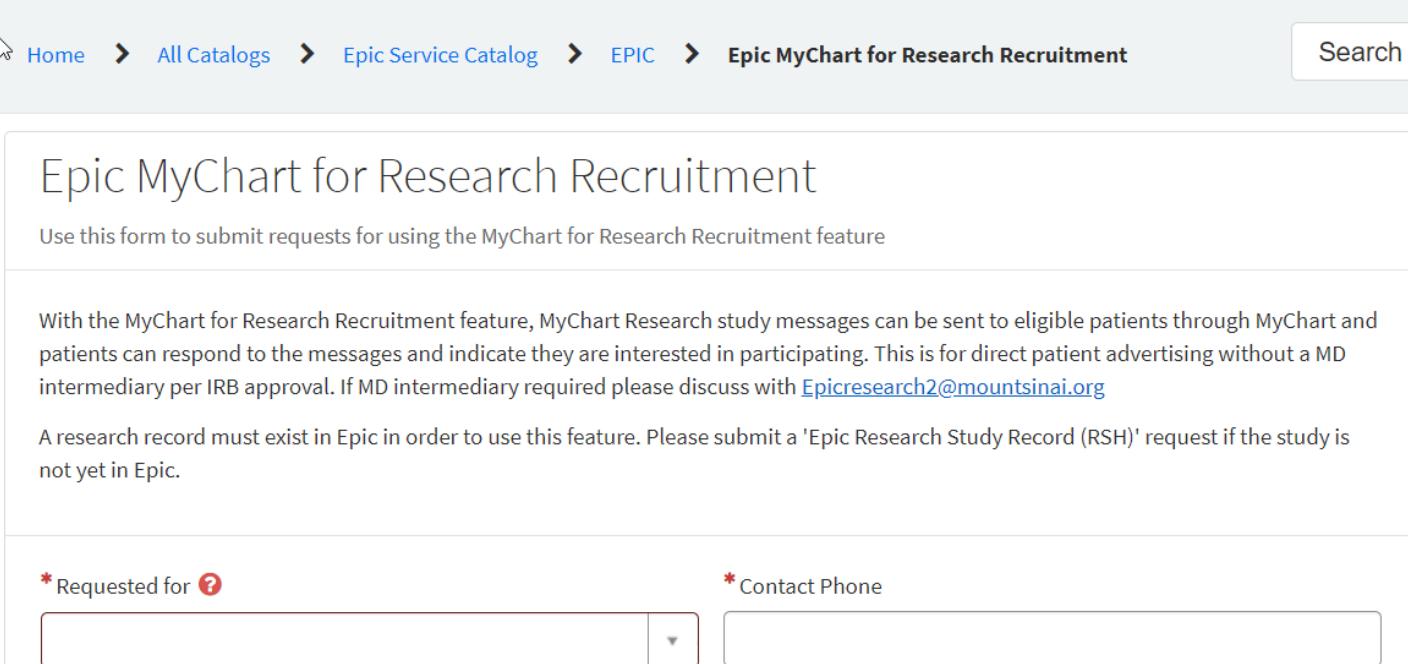
Research Recruitment Status Update  
This patient's study association status has changed. Please follow up accordingly.  
Research study: TEST  
Current status: Interested  
Updated: via MyMountSinai at 10/9/2023 9:00 AM

Patient's Other Study Associations

Research Study	Enrollment Status
AZACITIDINE W OR W/O THE HISTONE DEACETYLASE INHIBITOR MS-275 FOR MDS, AML, CHRONIC ML	Enrolled
eMERGE IV	Enrolled

# Request Process for MyChart Recruitment Feature

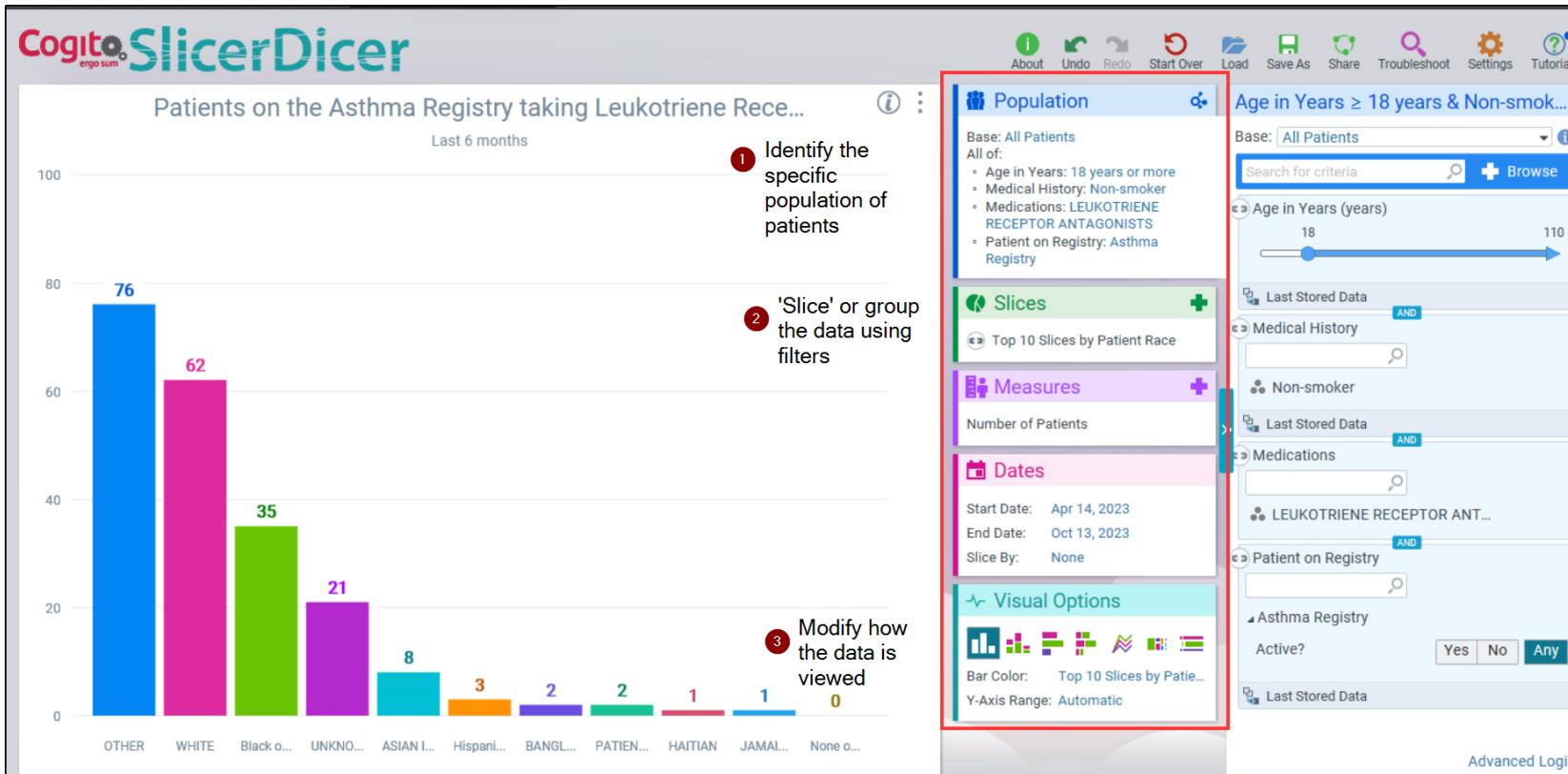
- If you would like to use MyChart Recruitment for your study:
  - Submit a ServiceNow request: [Epic MyChart for Research Recruitment](#)
- Team will reach out to schedule an intake call
  - Team reviews if study is a good fit for the feature
- Call with our Epic Research Advisory Group for final approval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



The screenshot shows a ServiceNow interface for submitting a request. The breadcrumb navigation at the top reads: Home > All Catalogs > Epic Service Catalog > EPIC > Epic MyChart for Research Recruitment. To the right of the breadcrumb is a search bar with the placeholder text 'Search C'. The main content area has a title 'Epic MyChart for Research Recruitment' and a sub-instruction 'Use this form to submit requests for using the MyChart for Research Recruitment feature'. Below this is a descriptive text block: 'With the MyChart for Research Recruitment feature, MyChart Research study messages can be sent to eligible patients through MyChart and patients can respond to the messages and indicate they are interested in participating. This is for direct patient advertising without a MD intermediary per IRB approval. If MD intermediary required please discuss with [Epicresearch2@mountsinai.org](mailto:Epicresearch2@mountsinai.org)'. Another text block below states: 'A research record must exist in Epic in order to use this feature. Please submit a 'Epic Research Study Record (RSH)' request if the study is not yet in Epic.' At the bottom of the form are two input fields: one for 'Requested for' (marked with a red asterisk) and one for 'Contact Phone' (also marked with a red asterisk).

# SlicerDicer

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



- Mount Sinai Data Warehouse Request:

<https://scicomp.mssm.edu/jira/servicedesk/customer/portal/4/create/56>

# Epic Research Monitors

# Granting Access to Epic for Study Monitors

## Requesting Clinical Trial Monitor/Auditor Access

### What

Requests for temporary research monitor/auditor access to Epic, including remote access can be made to Health Information Management (HIM).

### When

The requester will need to submit a request to HIM at least one week prior to the scheduled date of review.

### How

For step-by-step instructions the research team can refer to the internal document [Research Team Guidance: How to Request EPIC Access for Remote Monitoring](#). This includes contact details for HIM and an example email request template.

The Research SOP 001 can be provided to the monitor for instructions for set-up requirements, as well as the ROI Inspector Workflow guidance. The updated HIM Policy 19.3 Providing EPIC Access to Outside Reviewers can be provided to the sponsor or sponsor representative, if requested.

*Note to access these documents in SharePoint, you may be prompted to enter your MSHS credentials.*

- Monitor Access via SailPoint [new tip sheet created]
- More information available on the Research Roadmap:

[Monitoring and Audits | Research Roadmap \(mssm.edu\)](#)

## Study Monitoring Policies, Standard Operating Procedures (SOPs) and Guidance

Updated MSHS Guidelines for On-site and Remote Study Monitoring - Effective July 31, 2020

Purpose: Guidance for when remote vs. onsite monitoring should occur and what tools can be used and are approved institutionally to facilitate remote monitoring.

[Remote Monitoring Guidance for Sponsors](#) - NEW January 25, 2021 (Share with Sponsors and CROs)

[Remote Monitoring Guidance and Recommendations](#) - UPDATED January 25, 2021 (Do Not Share - contains internal contacts details and Mount Sinai sensitive information)

[Tip Sheet: SailPoint Reviewer Access Request 2024](#)

# Training Overview

## Current Training

- 1 day Instructor Led training available in PEAK
- Zoom

## Upcoming Training Date

- Thursday March 27th

## 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 in PEAK

## Required Training

Use the table below to access eLearning and/or enroll in classroom training.  
Want to know what is covered in a course? Visit the [Training Descriptions](#) page.

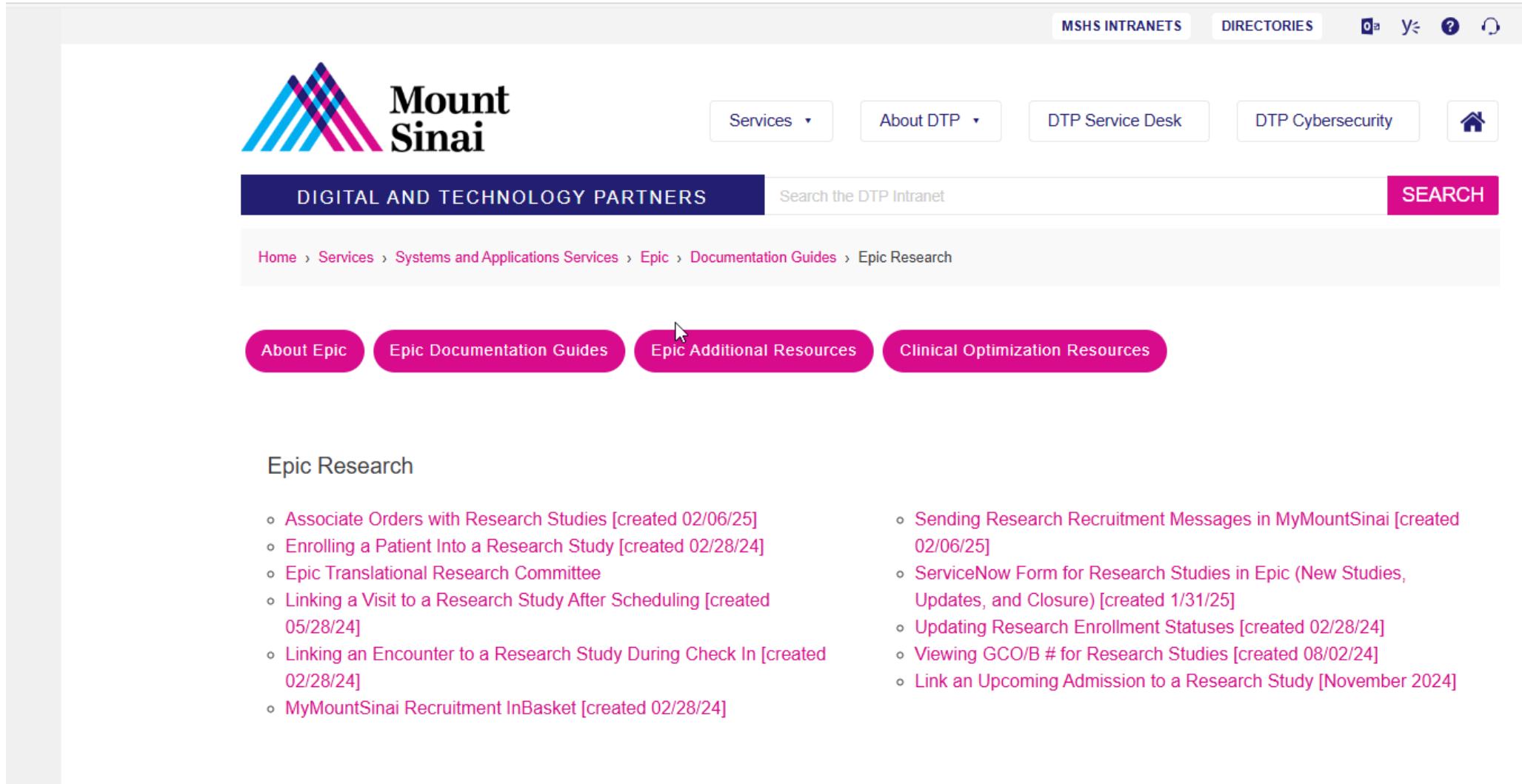
Job Role	Required Training Links
Ambulatory Clinical Research Coordinator	1. <a href="#">Clinical Research Coordinator Scheduling / Registration - Instructor-Led - 1 day</a>
Clinical Research Coordinators who do <u>NOT</u> need Sched / Reg Access	1. Complete <a href="#">Limited Clinical Research Coordinator eLearning</a>
Radiology Research Coordinator	1. Complete Pre-class eLearning: <a href="#">Overview of Hyperspace in an Outpatient Setting</a> <a href="#">Introduction to Ancillary Orders</a> <a href="#">Overview of In Basket</a> <a href="#">Run and Manage Reports</a> 2. <a href="#">Clinical Research Coordinator Scheduling / Registration - Instructor-Led - 1 day</a> 3. <a href="#">Radiology Research Coordinator - eLearning - 1 lesson</a>

	Scheduling/Registration	Enrolling patients in Research Studies	Linking Encounters to Research	Radiant Ancillary Orders
Full CRC Training	✓	✓	✓	✗
Limited CRC Training	✗	✓	✓	✗
Radiant Research Coordinator Training	✗	✗	✗	✓
View Only Training	✗	✗	✗	✗

# DTP Intranet for Research Tip Sheets

## Mount Sinai DTP Intranet

<https://mshsintranet.mountsinai.org/ITIntranet/Wireframe.aspx?pageid=21849>



MSHS INTRANETS DIRECTORIES   

**Mount Sinai**

DIGITAL AND TECHNOLOGY PARTNERS

Search the DTP Intranet **SEARCH**

Home > Services > Systems and Applications Services > Epic > Documentation Guides > Epic Research

About Epic **Epic Documentation Guides** **Epic Additional Resources** Clinical Optimization Resources

### Epic Research

- Associate Orders with Research Studies [created 02/06/25]
- Enrolling a Patient Into a Research Study [created 02/28/24]
- Epic Translational Research Committee
- Linking a Visit to a Research Study After Scheduling [created 05/28/24]
- Linking an Encounter to a Research Study During Check In [created 02/28/24]
- MyMountSinai Recruitment InBasket [created 02/28/24]
- Sending Research Recruitment Messages in MyMountSinai [created 02/06/25]
- ServiceNow Form for Research Studies in Epic (New Studies, Updates, and Closure) [created 1/31/25]
- Updating Research Enrollment Statuses [created 02/28/24]
- Viewing GCO/B # for Research Studies [created 08/02/24]
- Link an Upcoming Admission to a Research Study [November 2024]

# 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 [at this link](#).

- **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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