Leveraging Epic for Research: Training Topics Overview

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March 17th, 2025

Icahn School of Medicine at 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

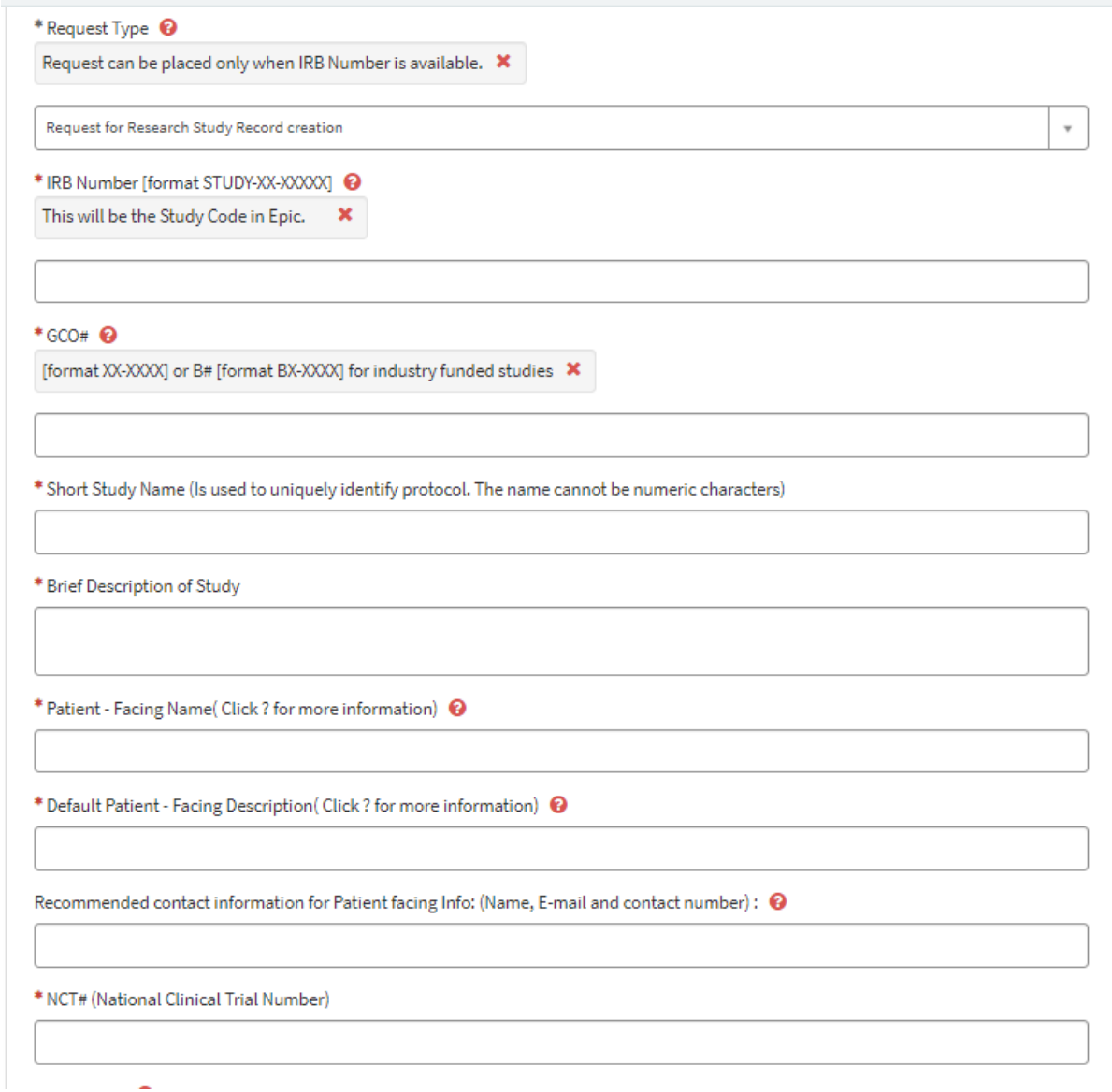
Current Process

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]

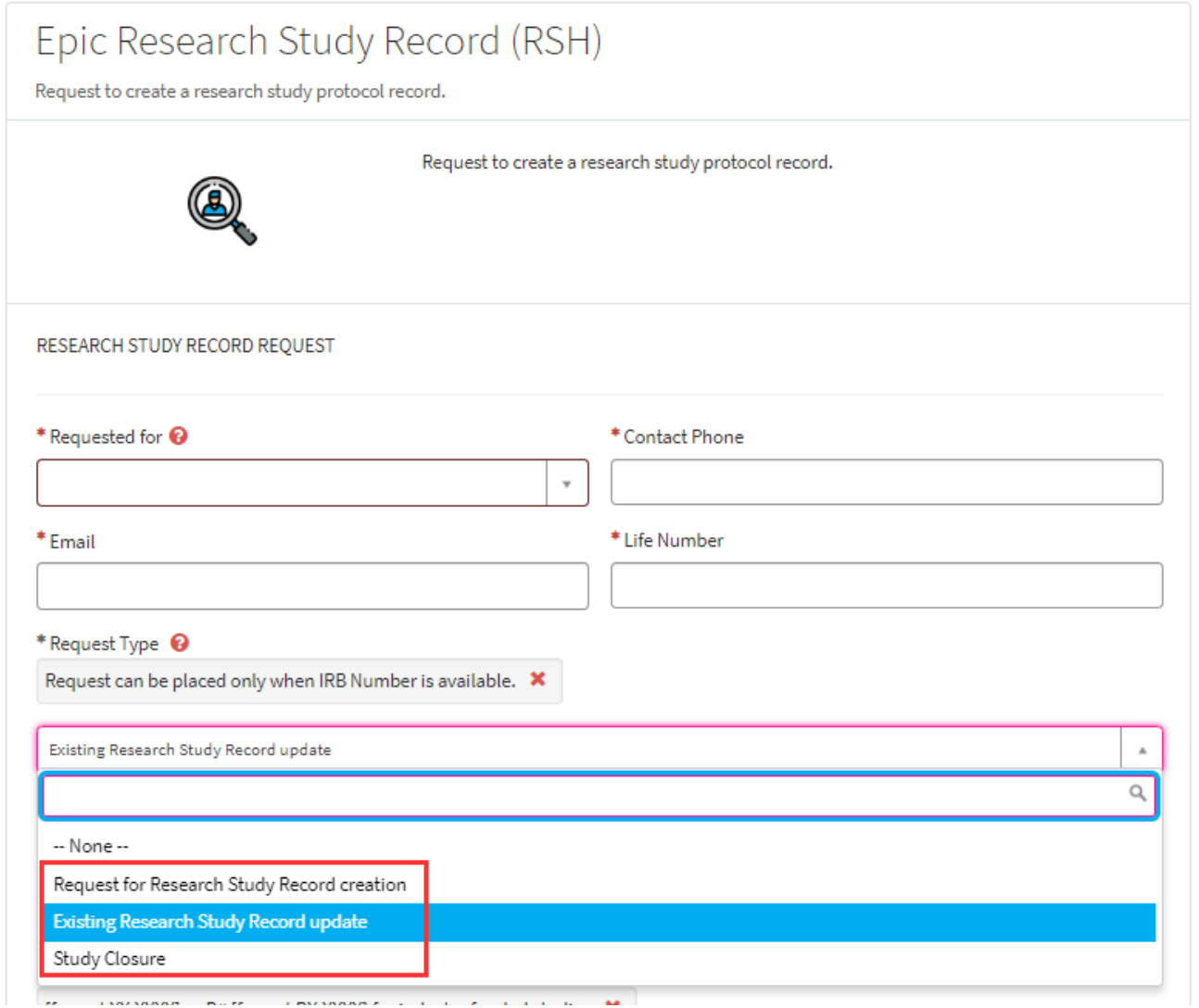
- Before a patient is enrolled in a Research Study in Epic, a request to create the study record must be submitted in ServiceNow
  - Basic information is collected such as NCT#, IRB Assigned Study # and Principal Investigator
  - Use the same information in this form as the IRB submission portal
  - 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)]

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 Record Policy

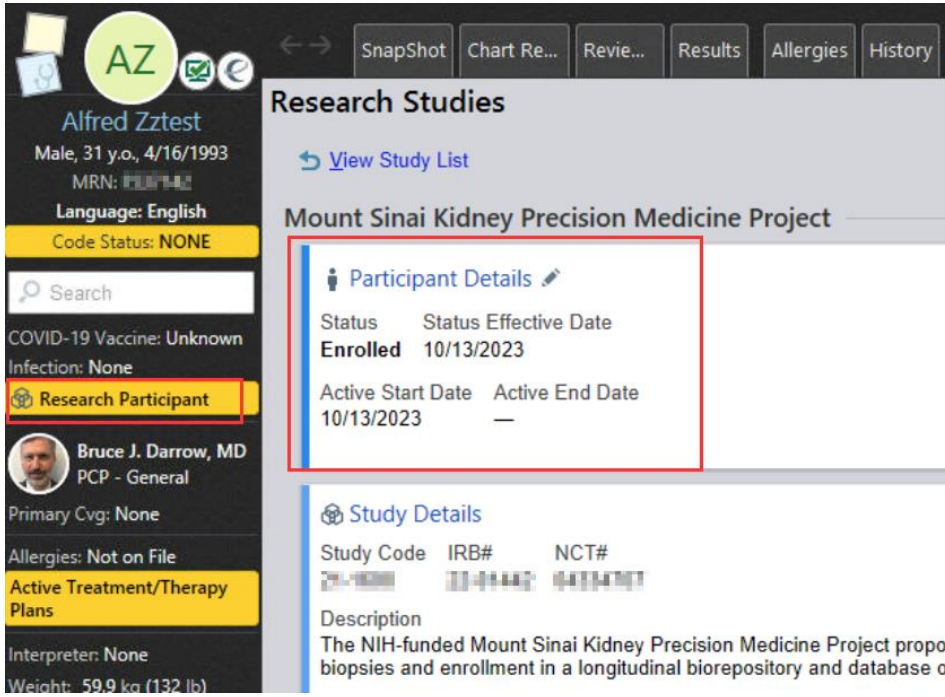
“All prospective human research studies with the billable services will have a research record (RSH) in Epic at the minimum. This policy applies to all research studies conducted at Mount Sinai Health System”

- ***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 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:

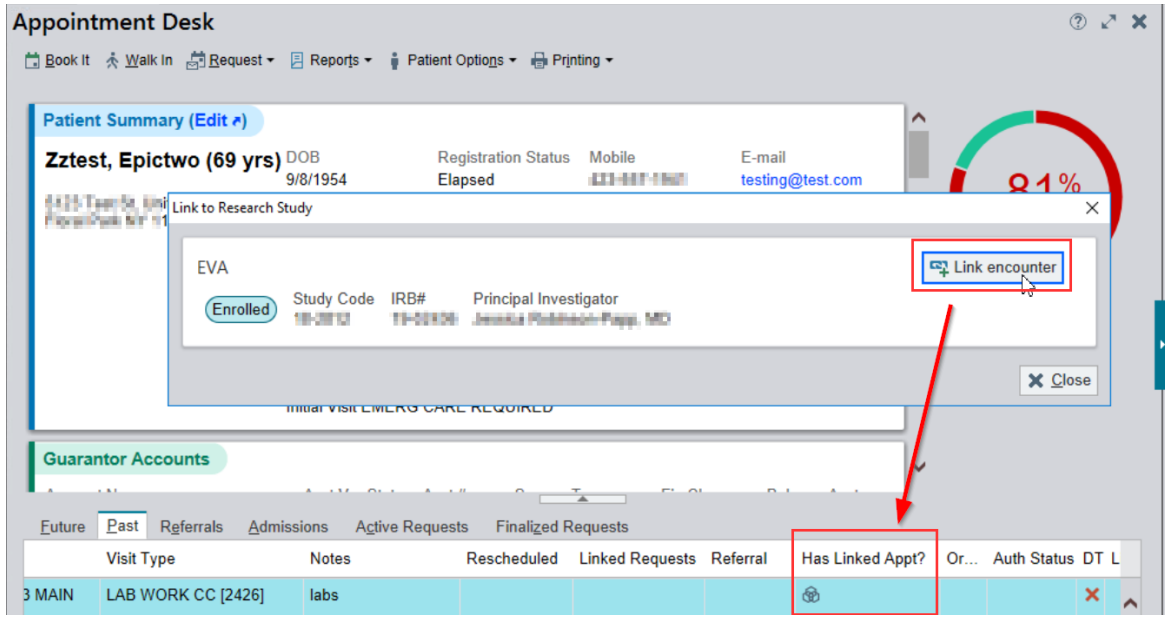
- Scheduling– via the Appointment Desk
- Registration – via the Research Encounter Association

The association can be viewed in:

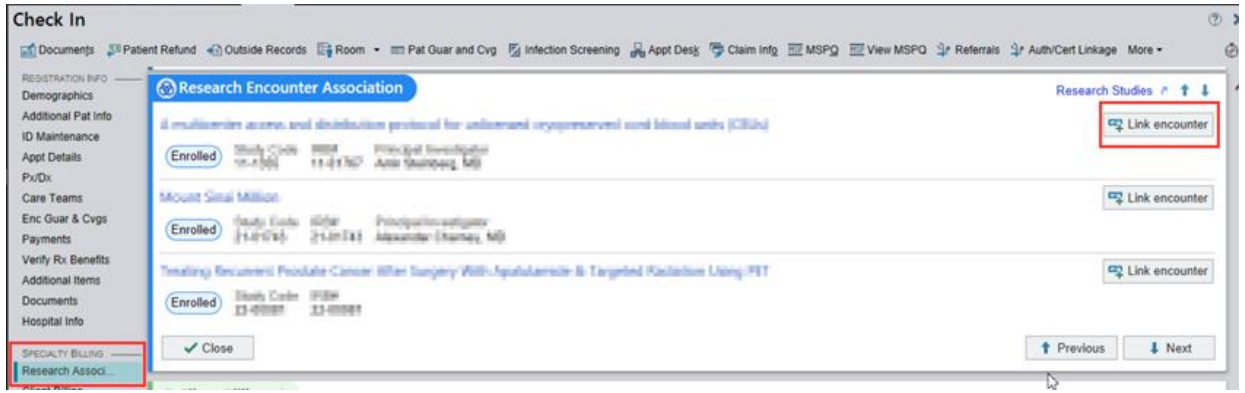
- Scheduling Activities
  - At sites with Epic Scheduling and Registration
- Chart Review

Indicate an Encounter as Research Encounter

Scheduling:



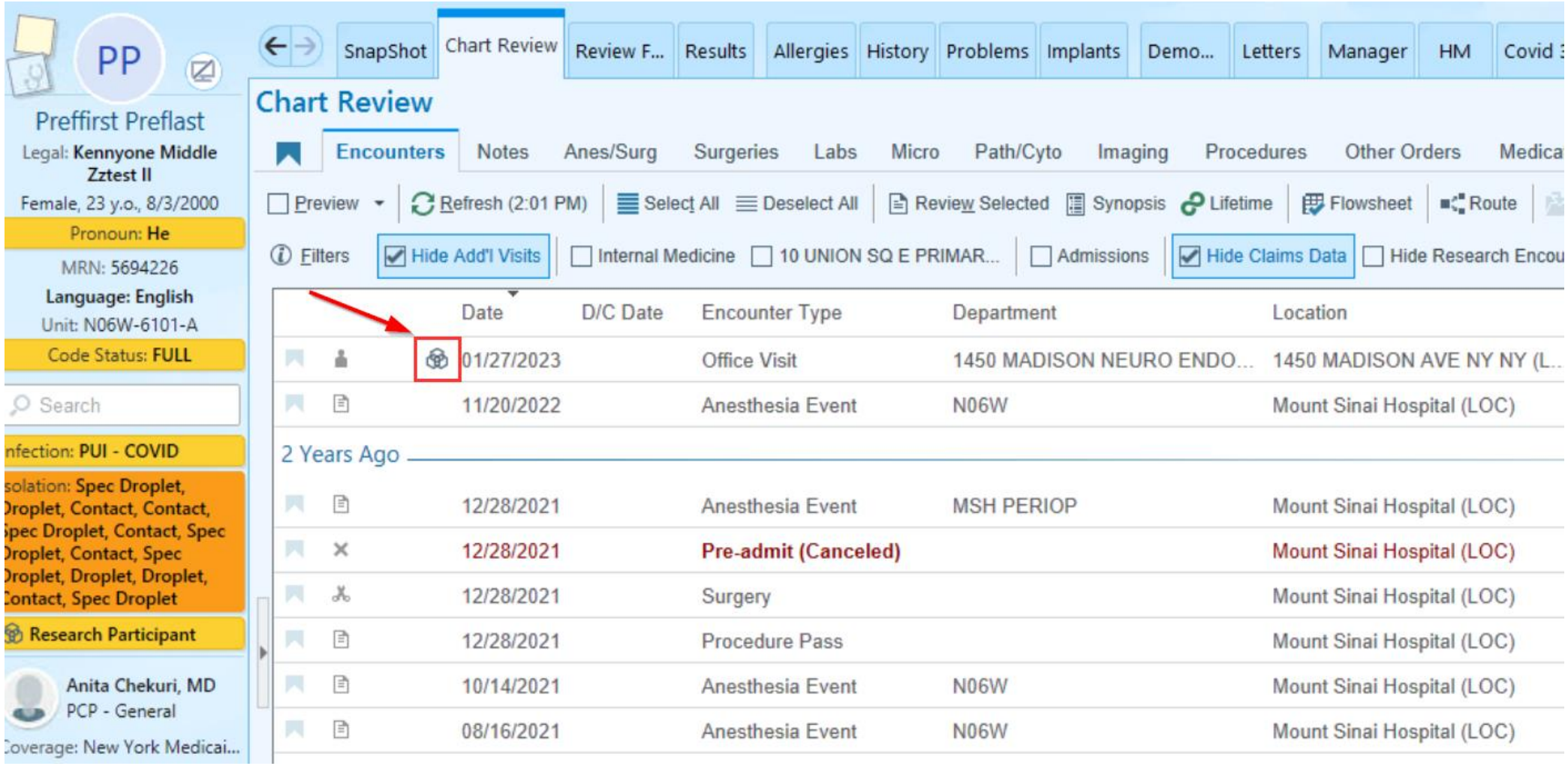
Registration:



New Feature

Research Linkage is visible in Chart Review

Q2 2024

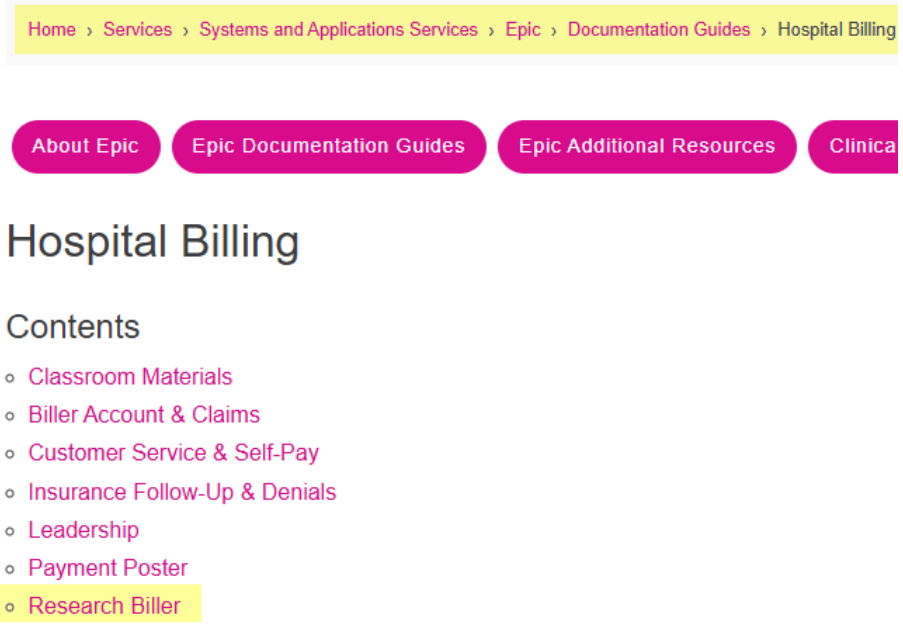


Research Billing Review

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

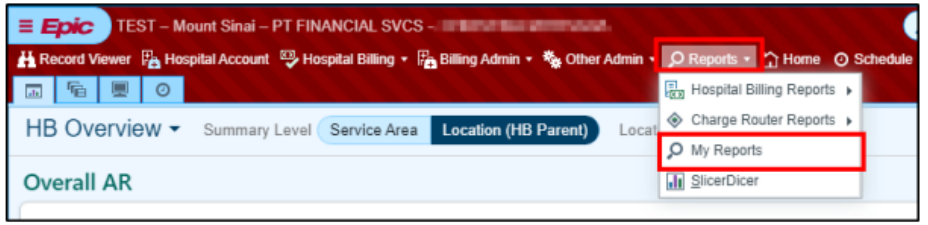


Research Billing Review

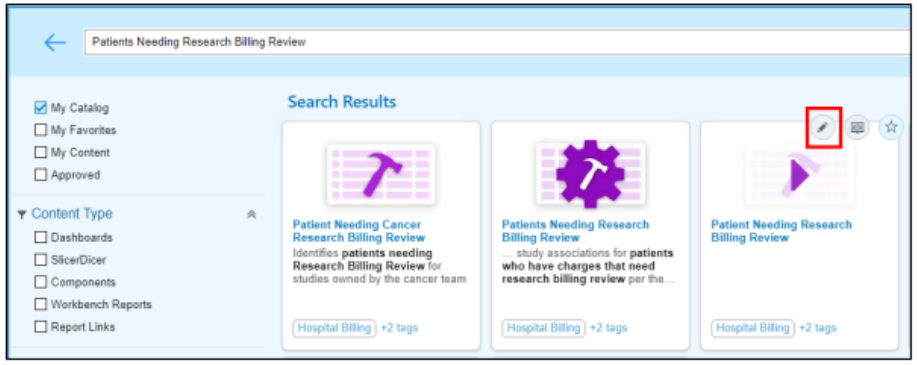
Patients that are enrolled in research study programs will need to have their encounter review. The review will be done by running a report within Epic.

*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.



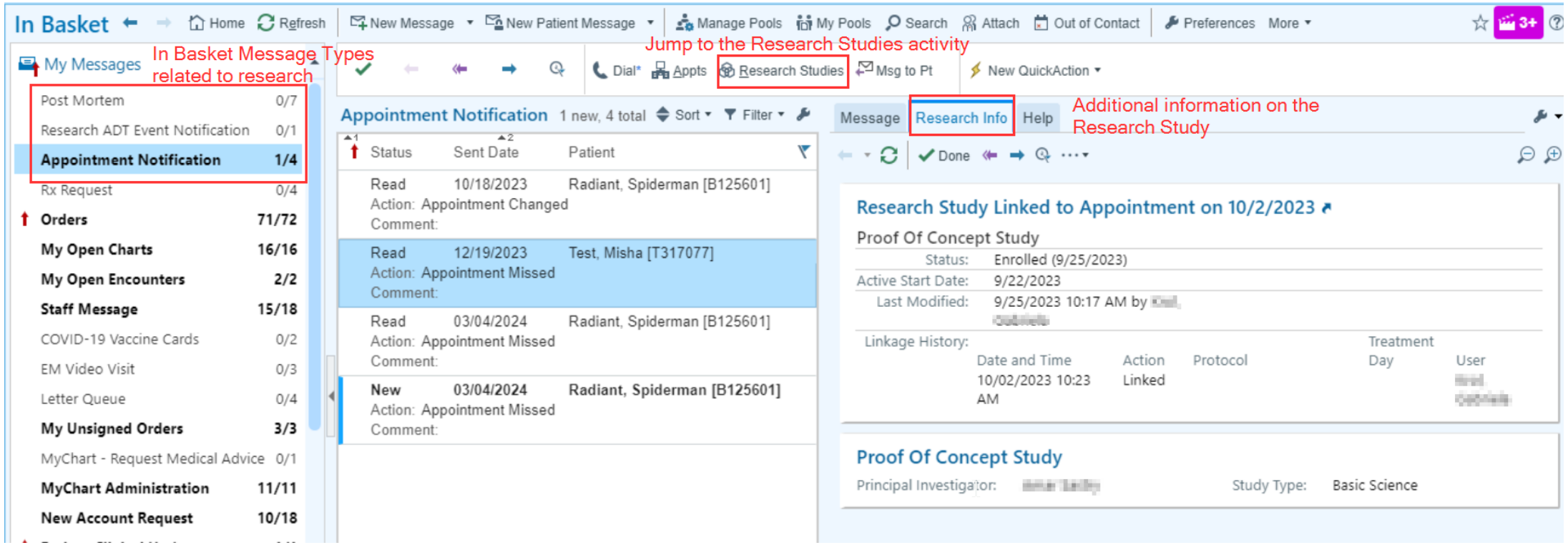
2. In the Analytics Catalog search for **Patients Needing Research Billing Review** and press enter.
3. Hover **Patients Needing Research Billing Review** and select the pencil icon to edit the report.



Research Billing Review Through Reports Tip Sheet.pdf

Notify Research Staff of Research Patient Appointment/Admission/Demise

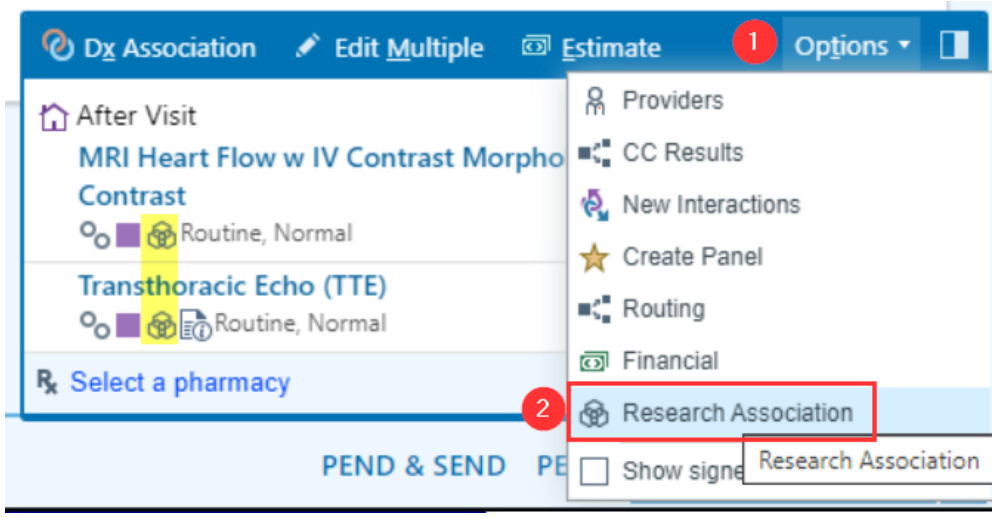
- Research staff (PI & Research Coordinators) listed in the Research study record receive automatic notifications via **Epic In-Basket** (Notifications will not be received via email)
  - **Appointment Notification**: Appointment is canceled, missed or changed
  - **Research ADT Event Notification**: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

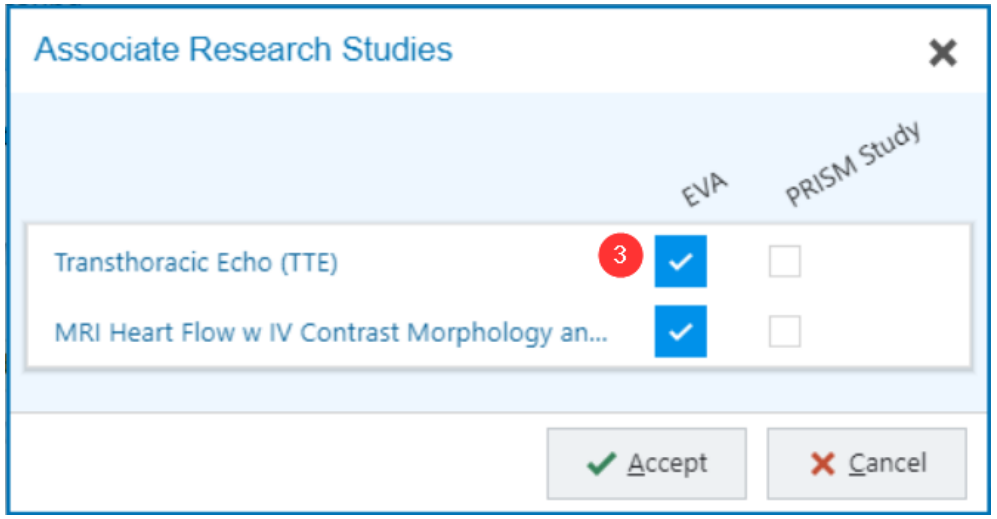


New Feature

Indicate an Order as Related to Research

Q2 2024





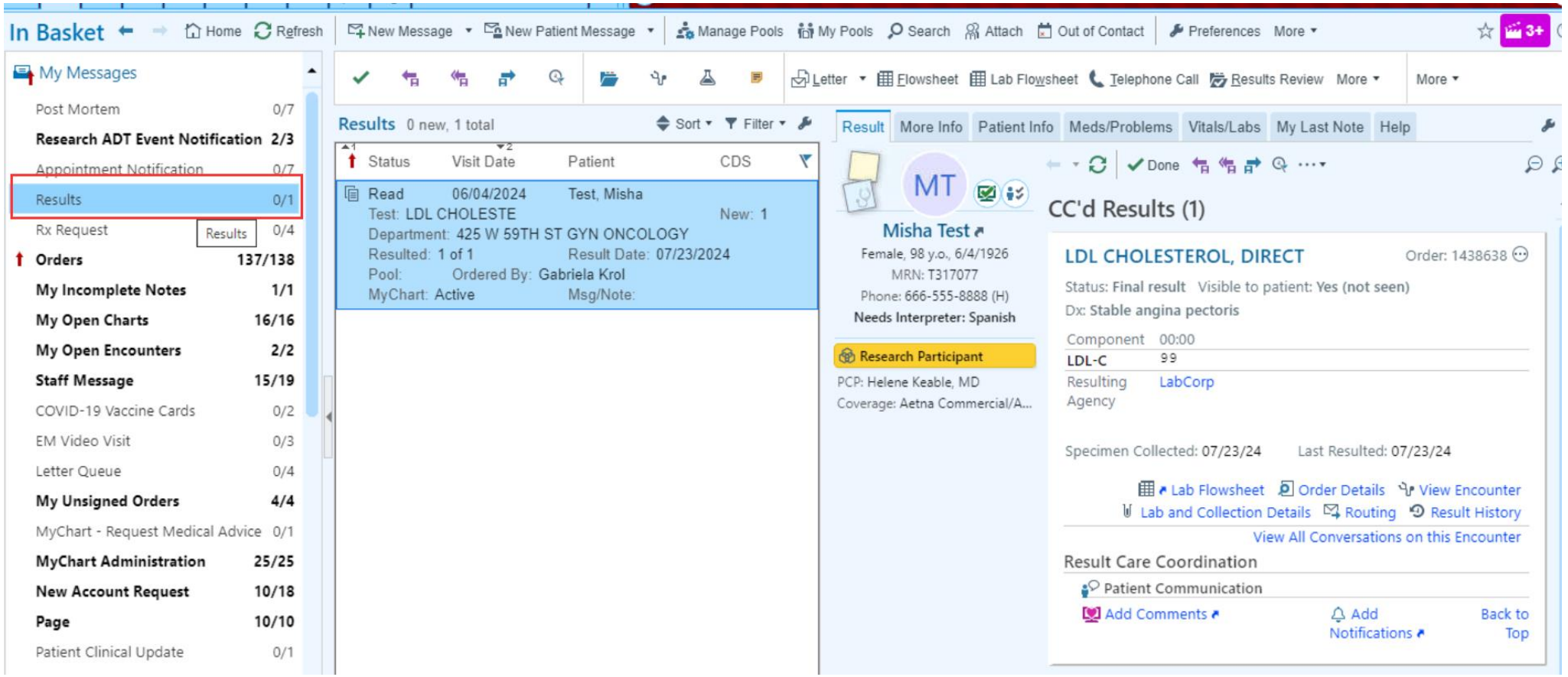
Available for all specialties now and anyone user who is placing research related orders [MDs, NPs, PAs, etc]

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

Coming Soon

Results Routing to Study Staff



CC options:

- PI and Coordinators
- Only PI
- Only Coordinators

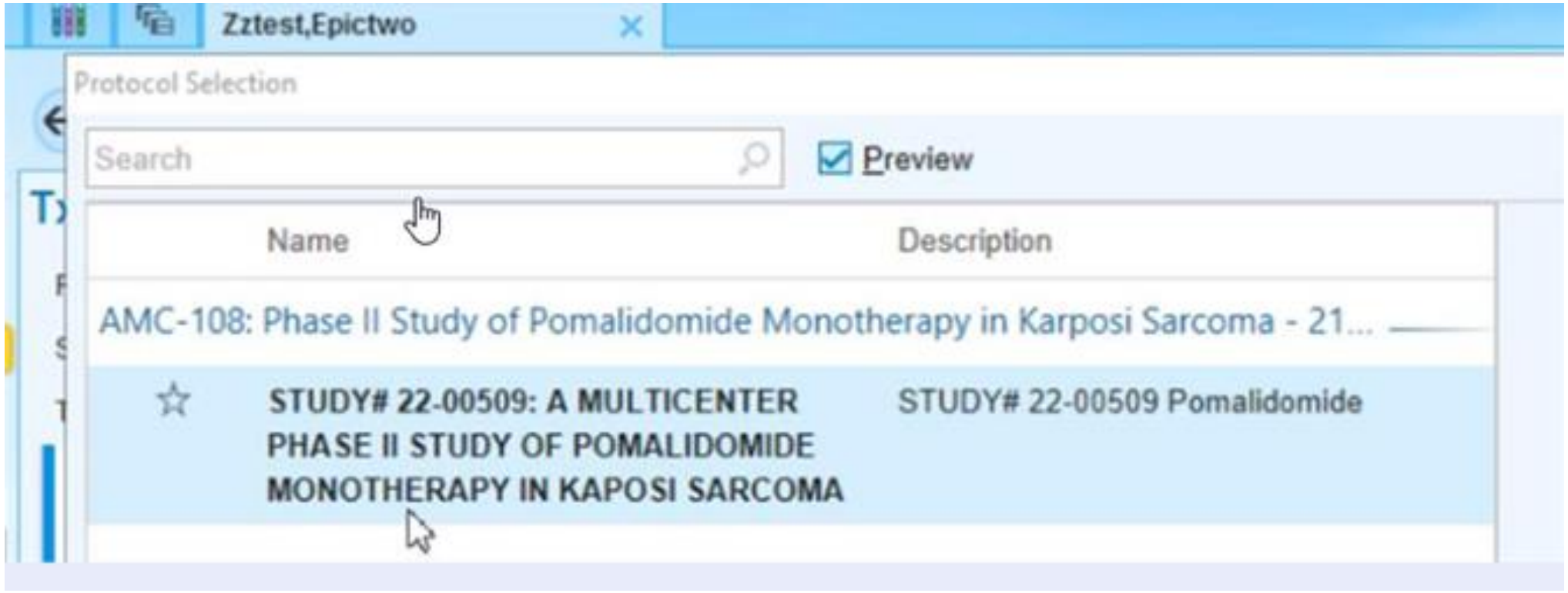
Requirements:

Relies on accurate study members being listed

Study team must having access to Mount Sinai Epic In Basket

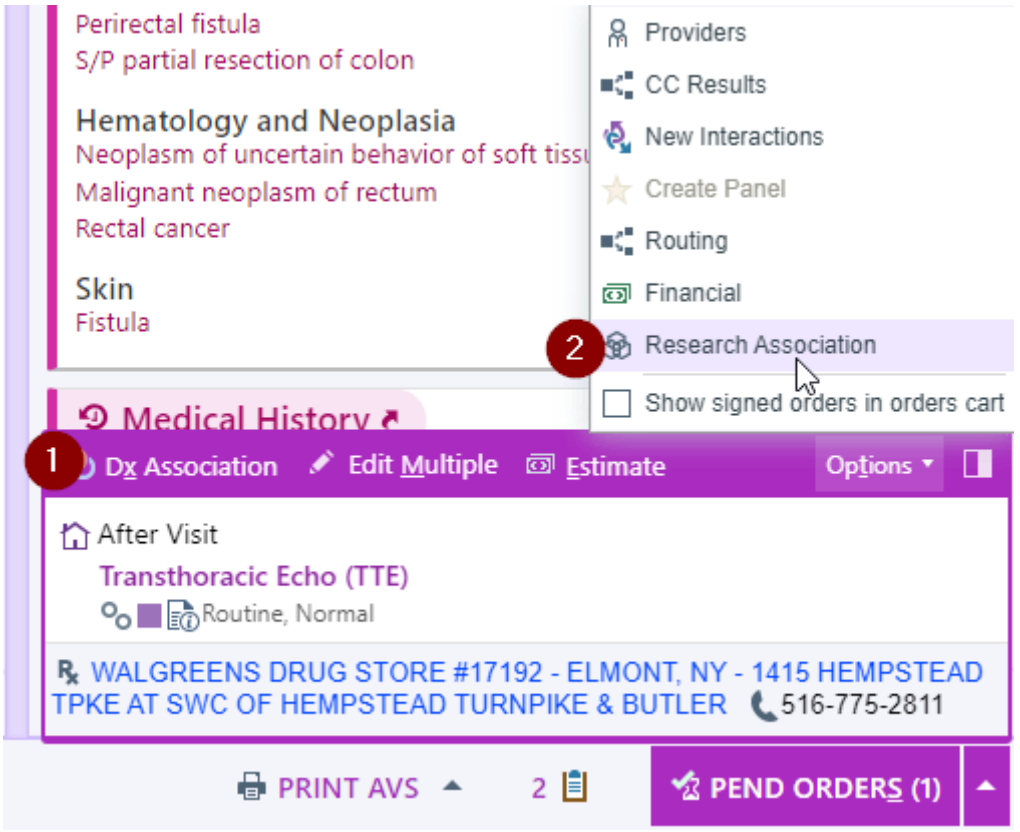
Associate Oncology Research Studies with Study Protocols

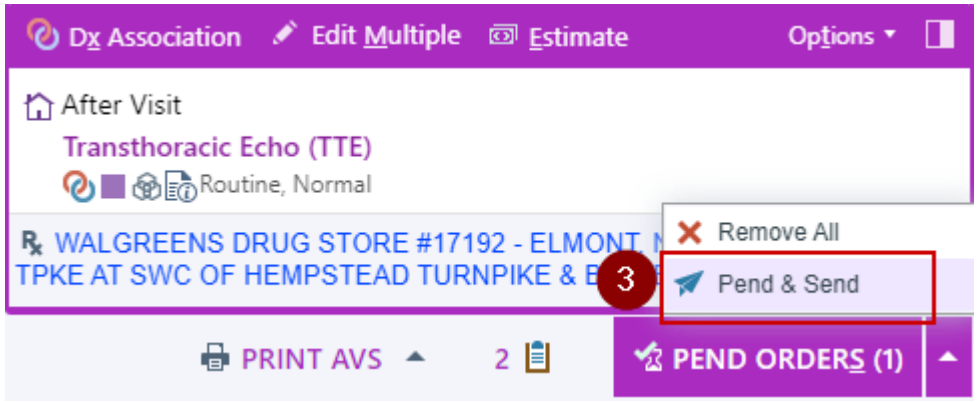
- Can associate a research study with one or more Beacon treatment protocols

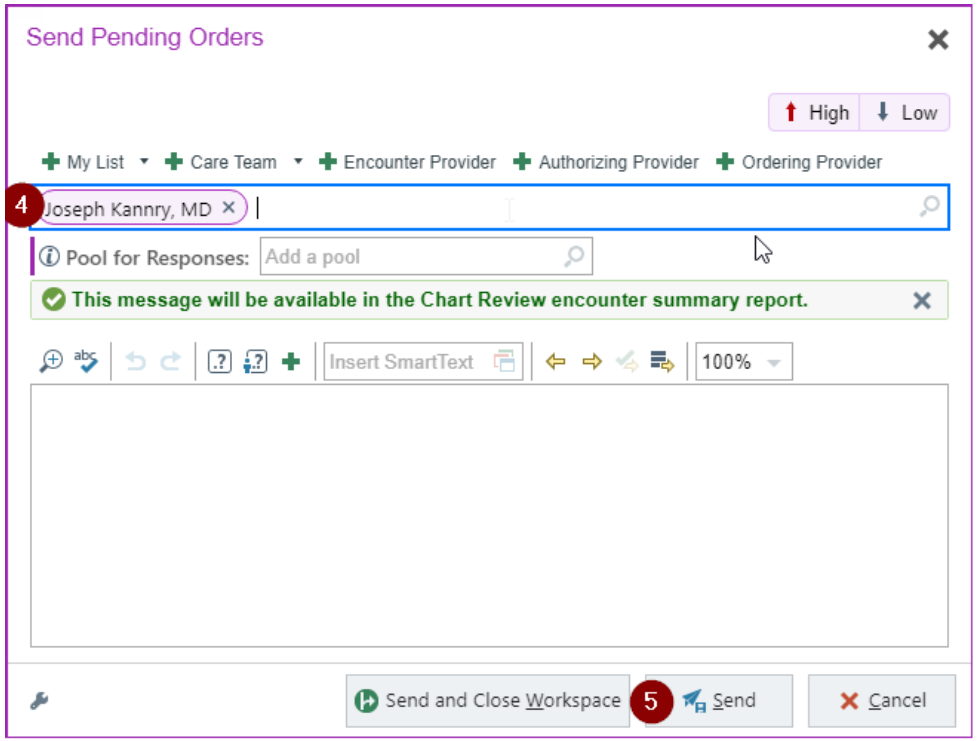


Coming Soon

Credentialed Research Coordinators Pend & Send Orders





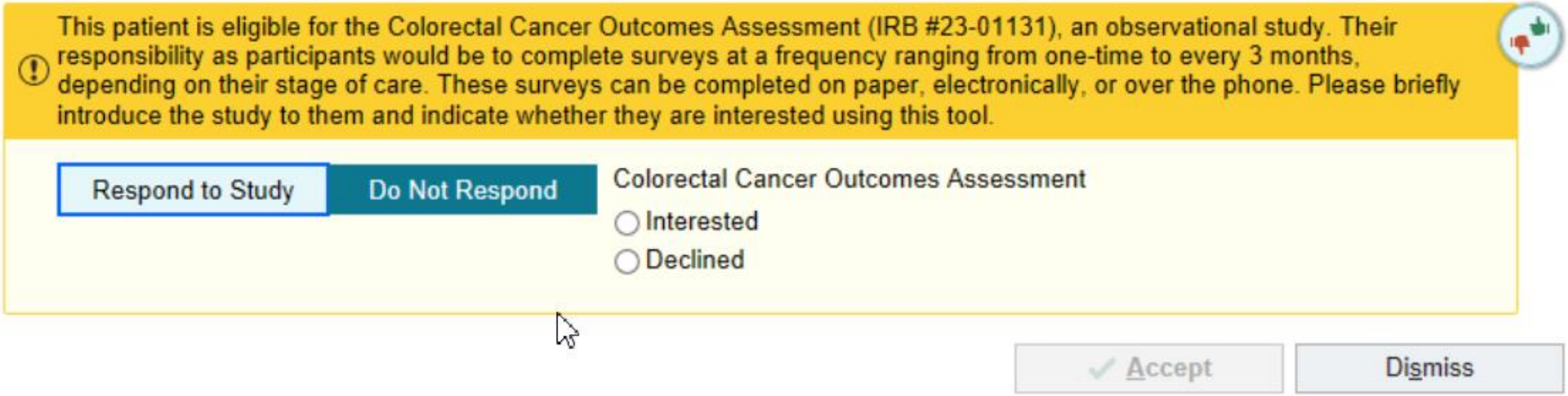


Coordinators will have the ability to Pend orders and send to credentialed user to sign the order

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



Clinical Trial Recruitment Alerts at Point of Care

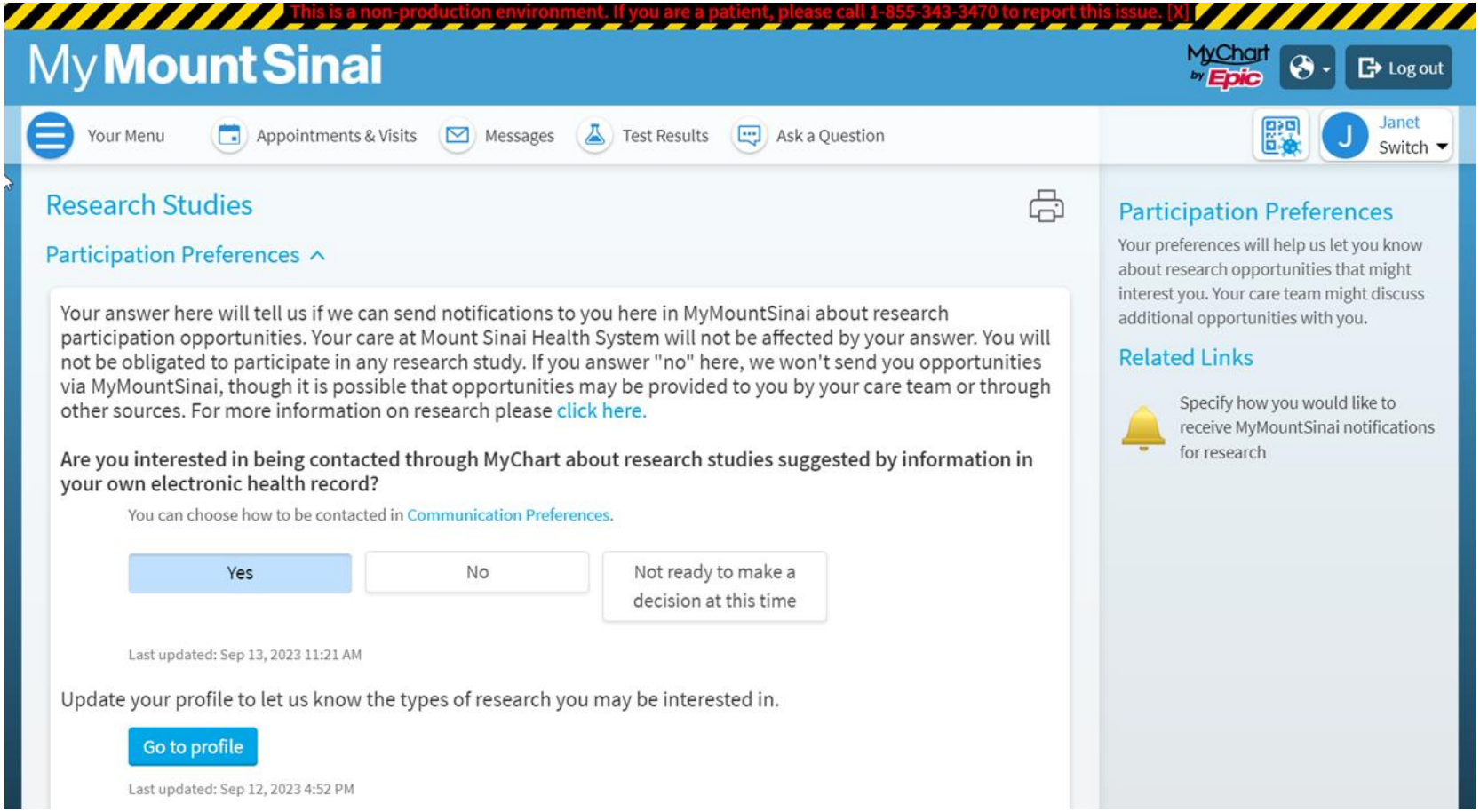
- Our Practice Advisories (OPAs) work best the more discrete the better!

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]

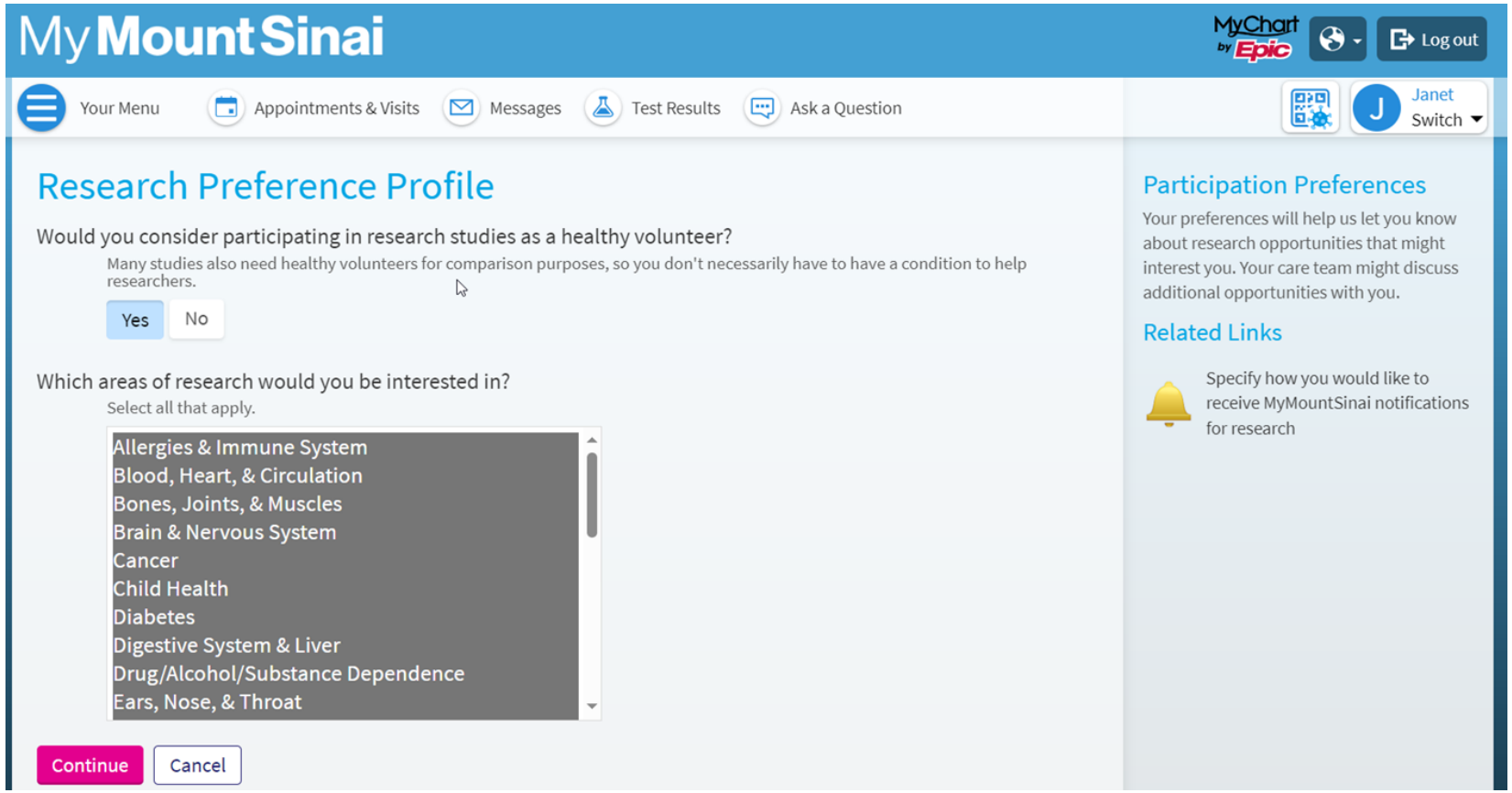
Patient Opt In/Out of Research Recruitment via MyMountSinai

- 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

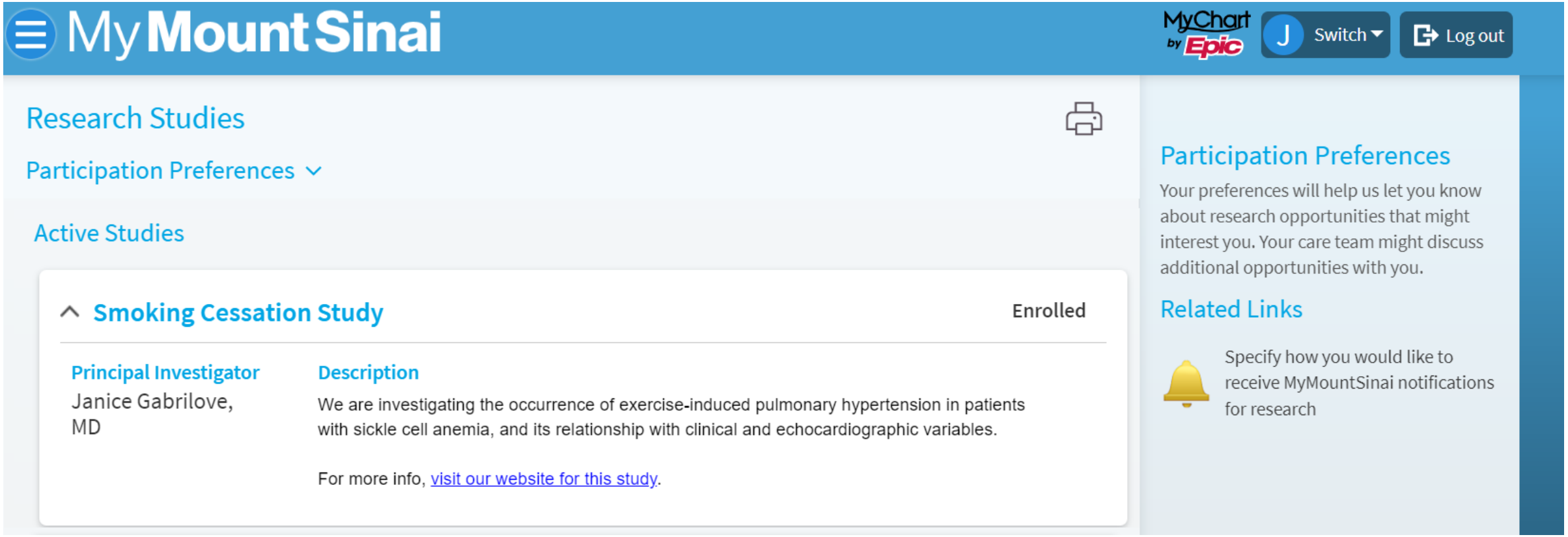


List of ‘Areas of Research’ Currently Available

- 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

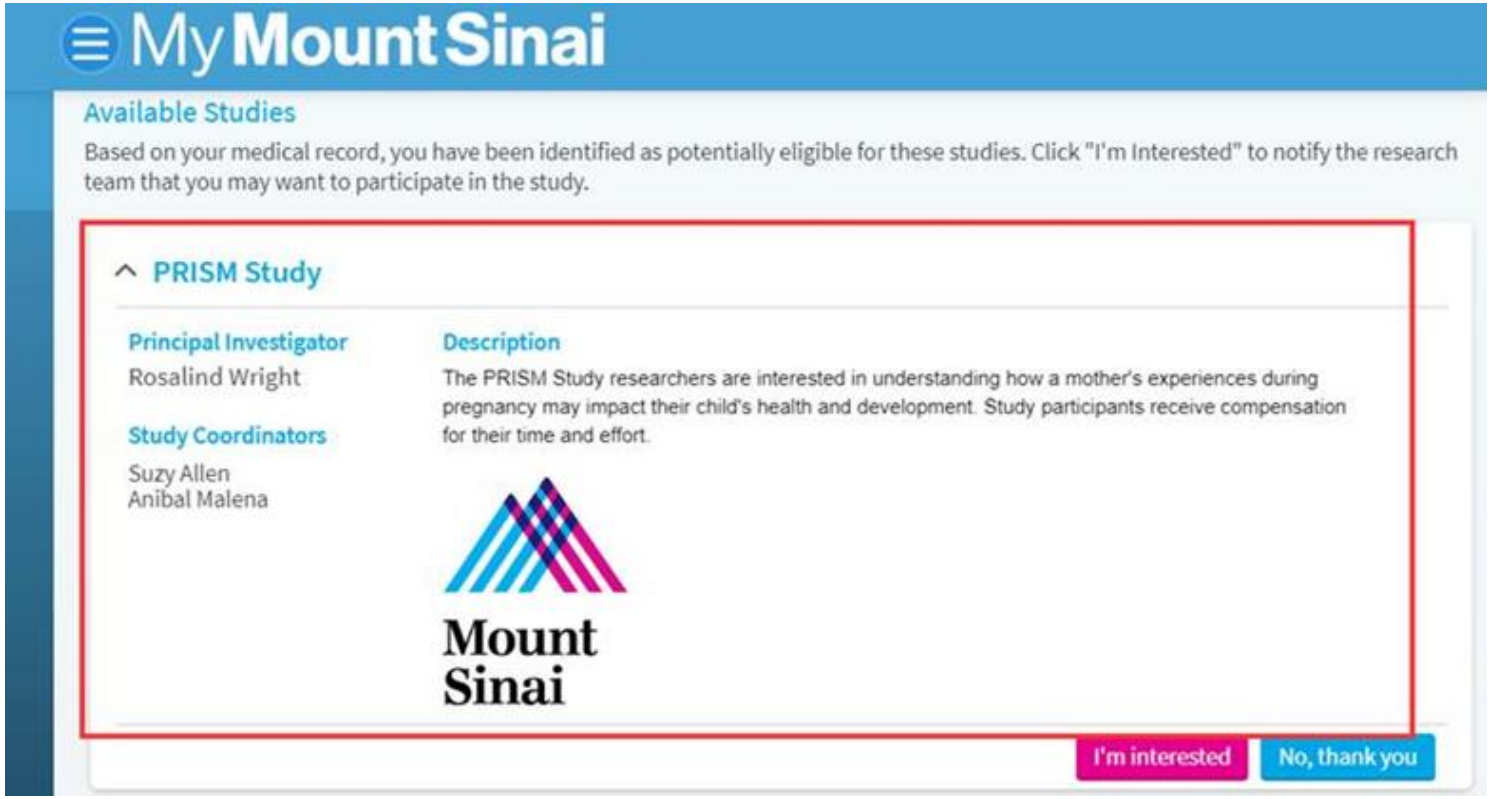
Show Current Epic Research Studies in MyMountSinai

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

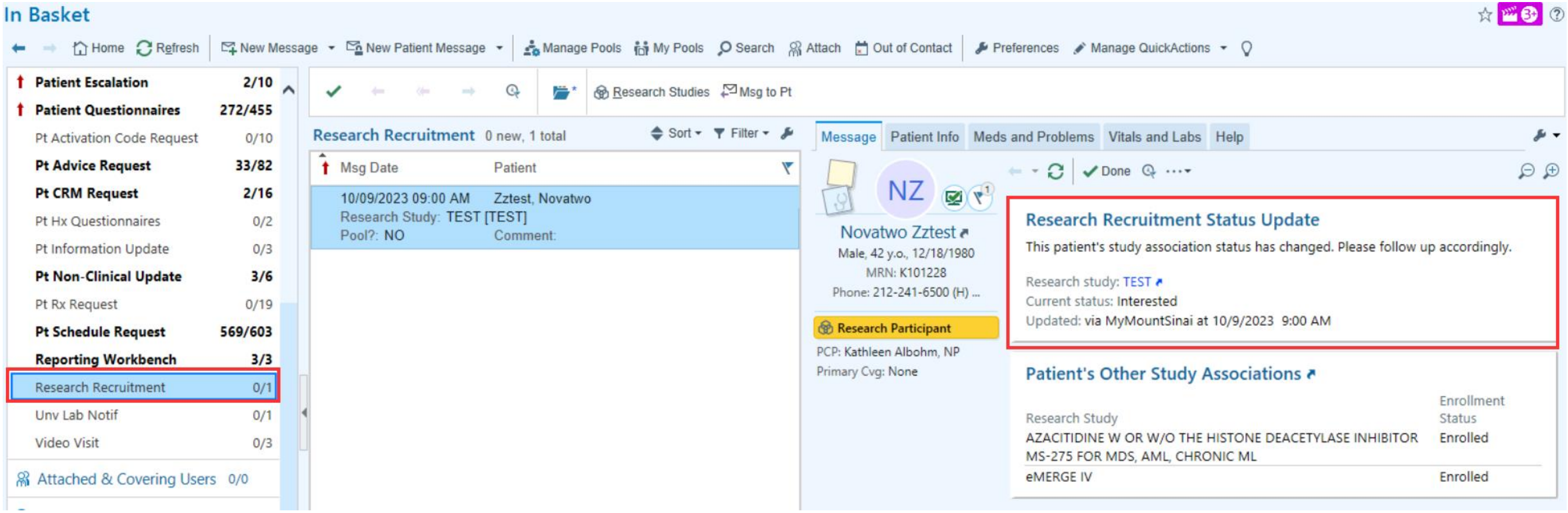


Send MyMountSinai Research Messages to Recruit Participants

- 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

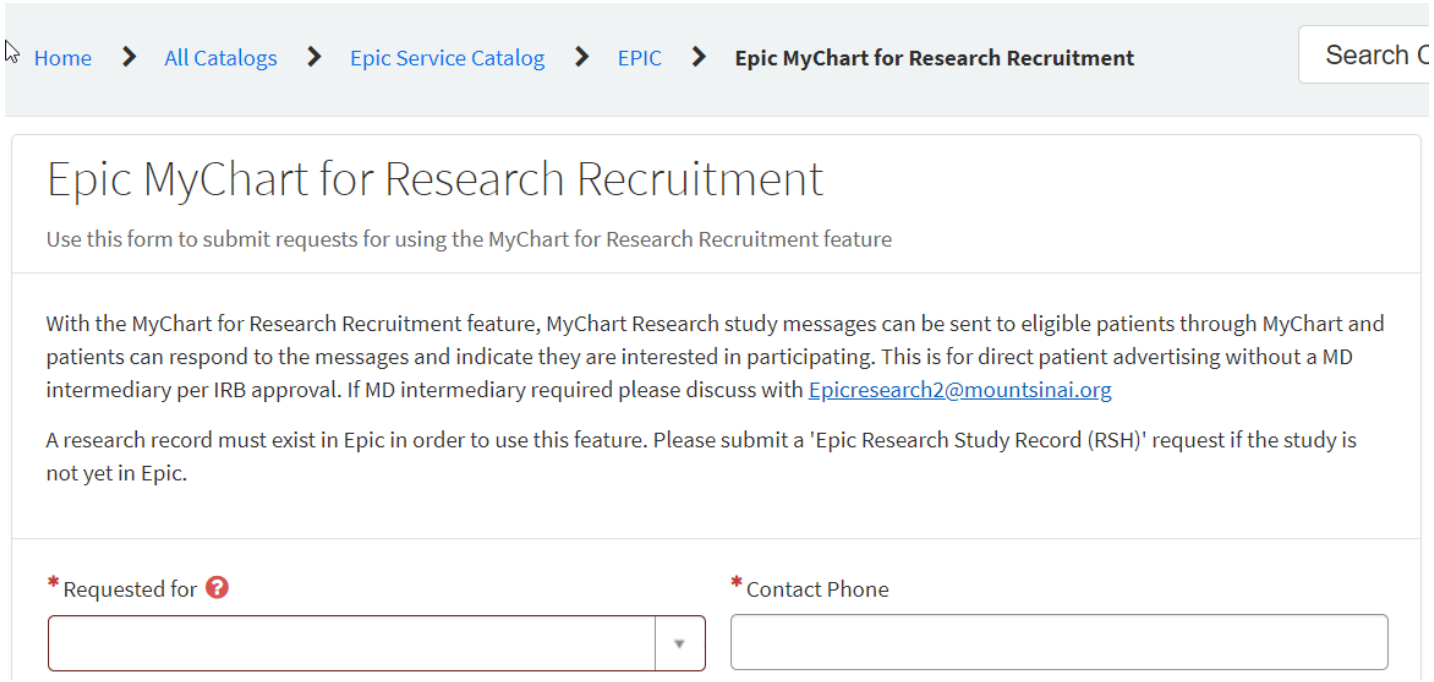


In Basket Message for MyChart Recruitment



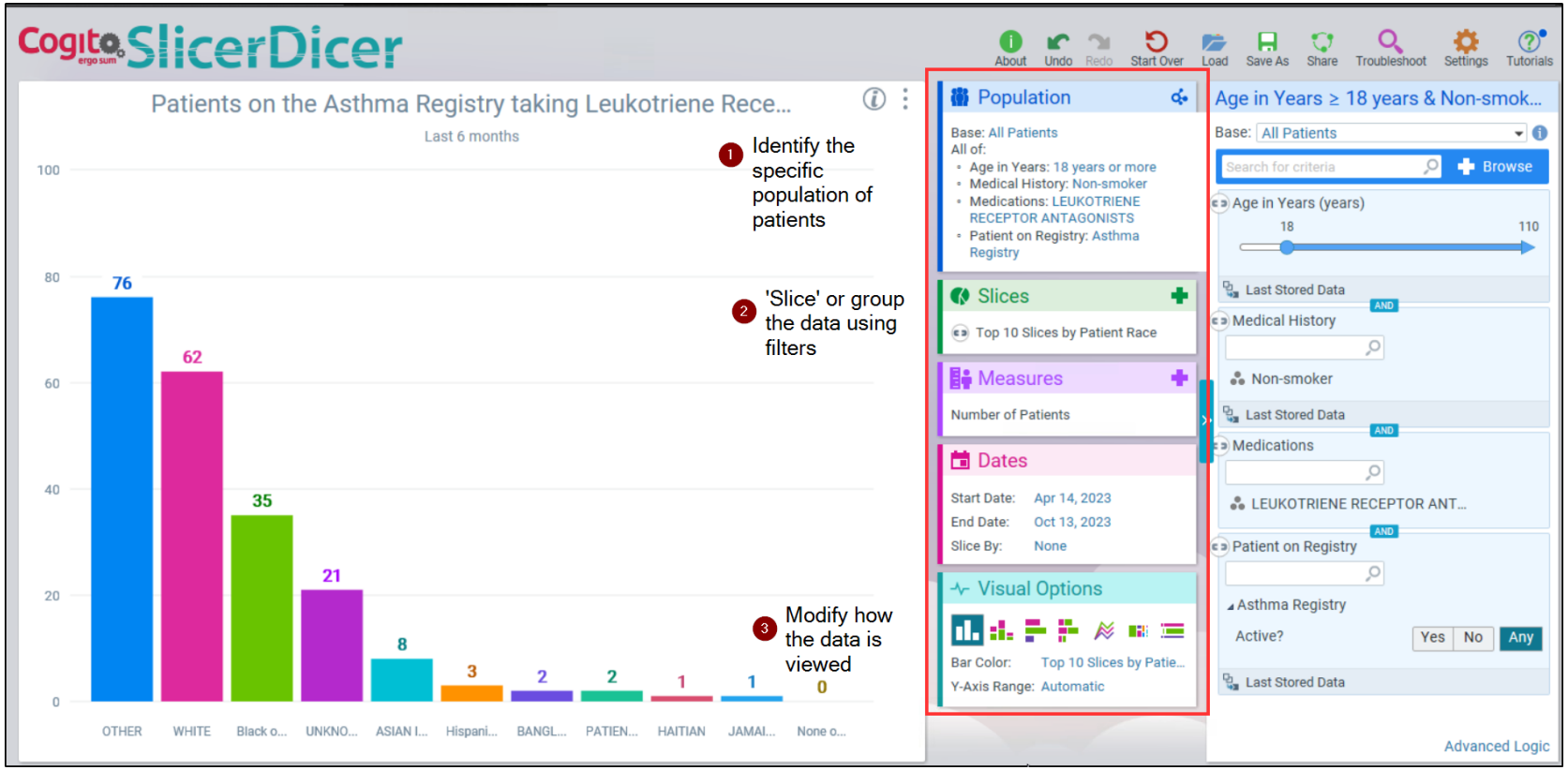
Request Process for MyChart Recruitment Feature

- If you would like to use MyChart Recruitment for your study:
  - Submit a ServiceNow request: 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



SlicerDicer

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



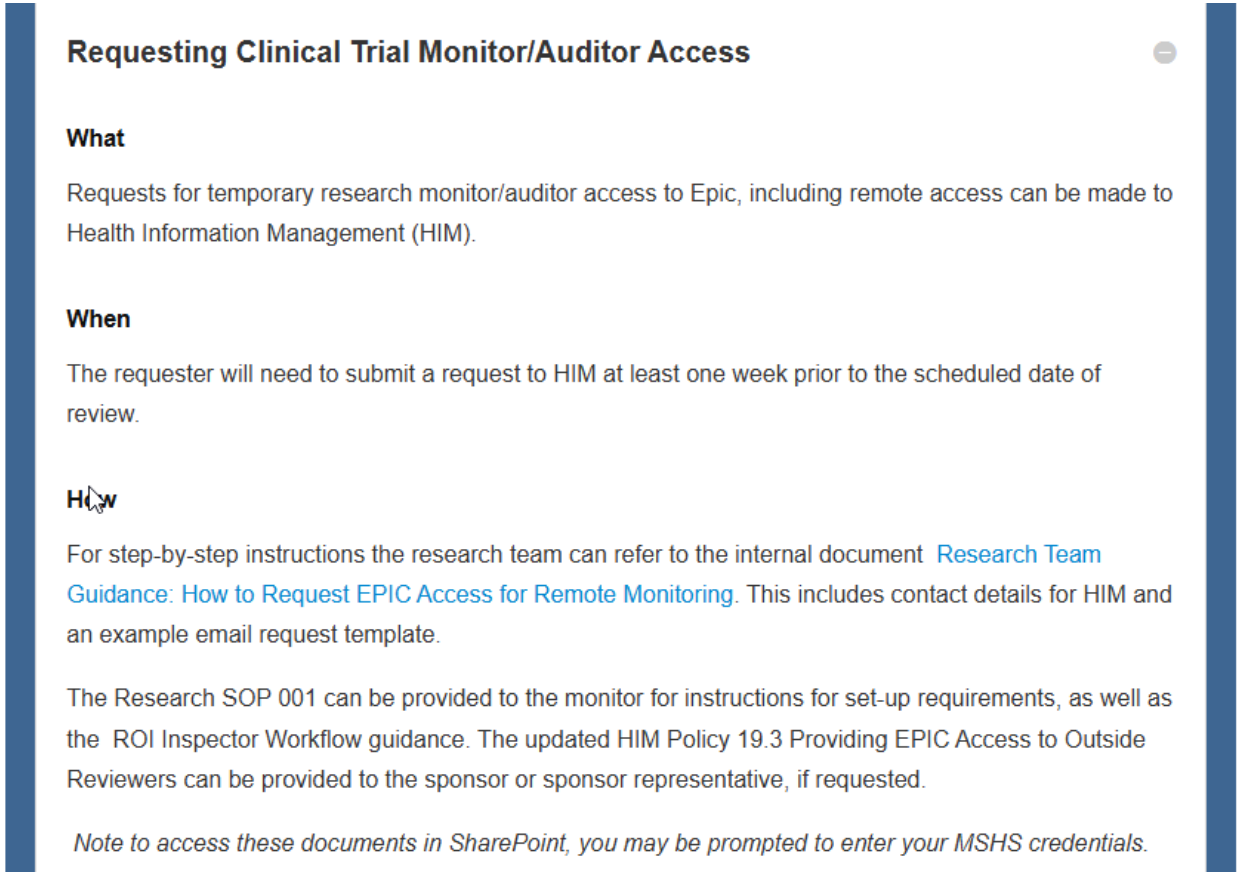
- Mount Sinai Data Warehouse Request:

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

Epic Research Monitors

Updated Info

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

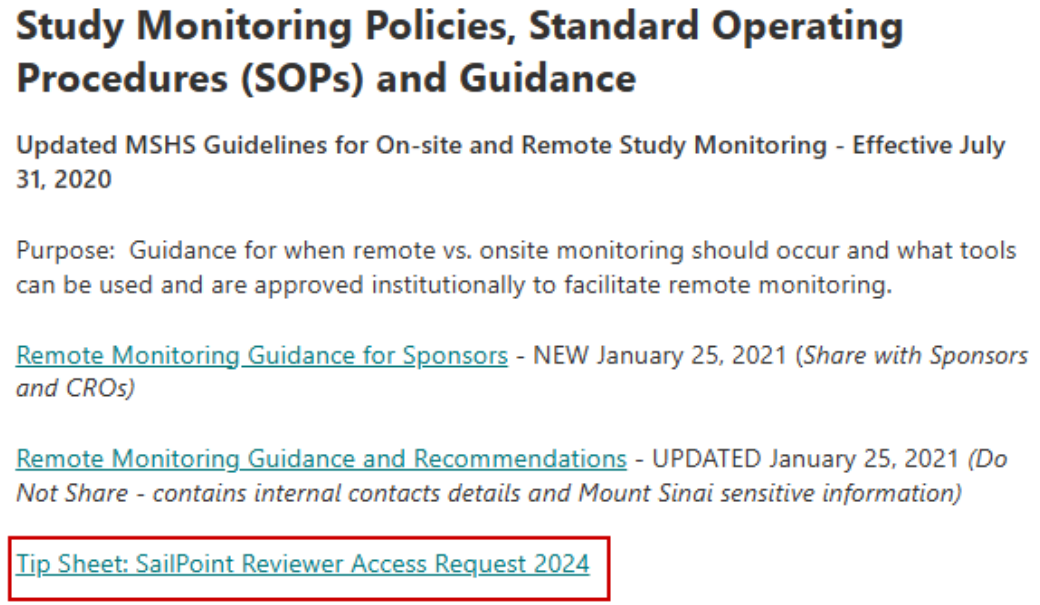
The requester will need to submit a request to HIM at least one week prior to the scheduled date of review.

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.



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

- Monitor Access via SailPoint [new tip sheet created]
- 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 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.

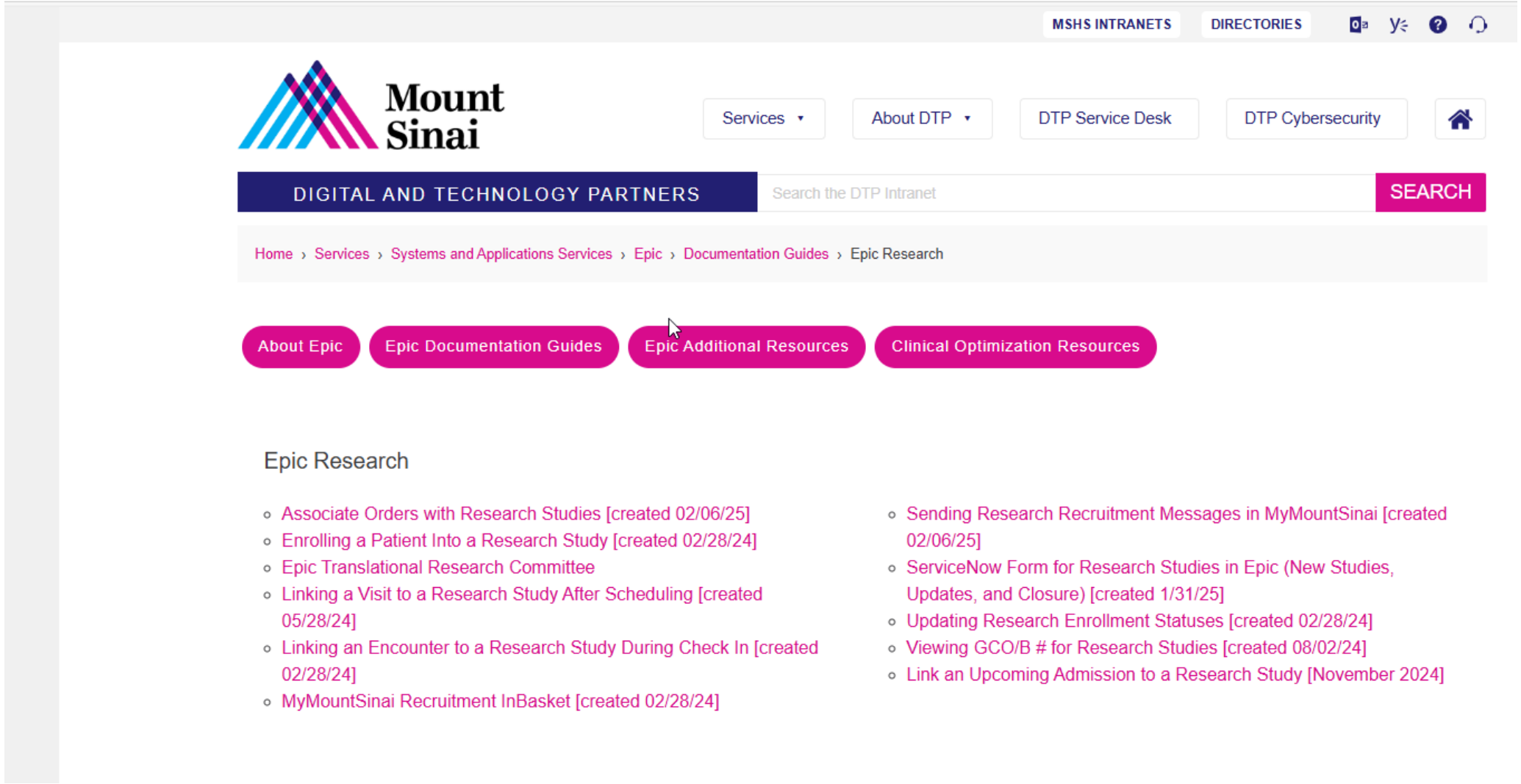
Job Role	Required Training Links
Ambulatory Clinical Research Coordinator	1. Clinical Research Coordinator Scheduling / Registration - Instructor-Led - 1 day
Clinical Research Coordinators who do NOT need Sched / Reg Access	1. Complete Limited Clinical Research Coordinator eLearning
Radiology Research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

	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



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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