

Leveraging Epic for Research: Training Topics Overview

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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

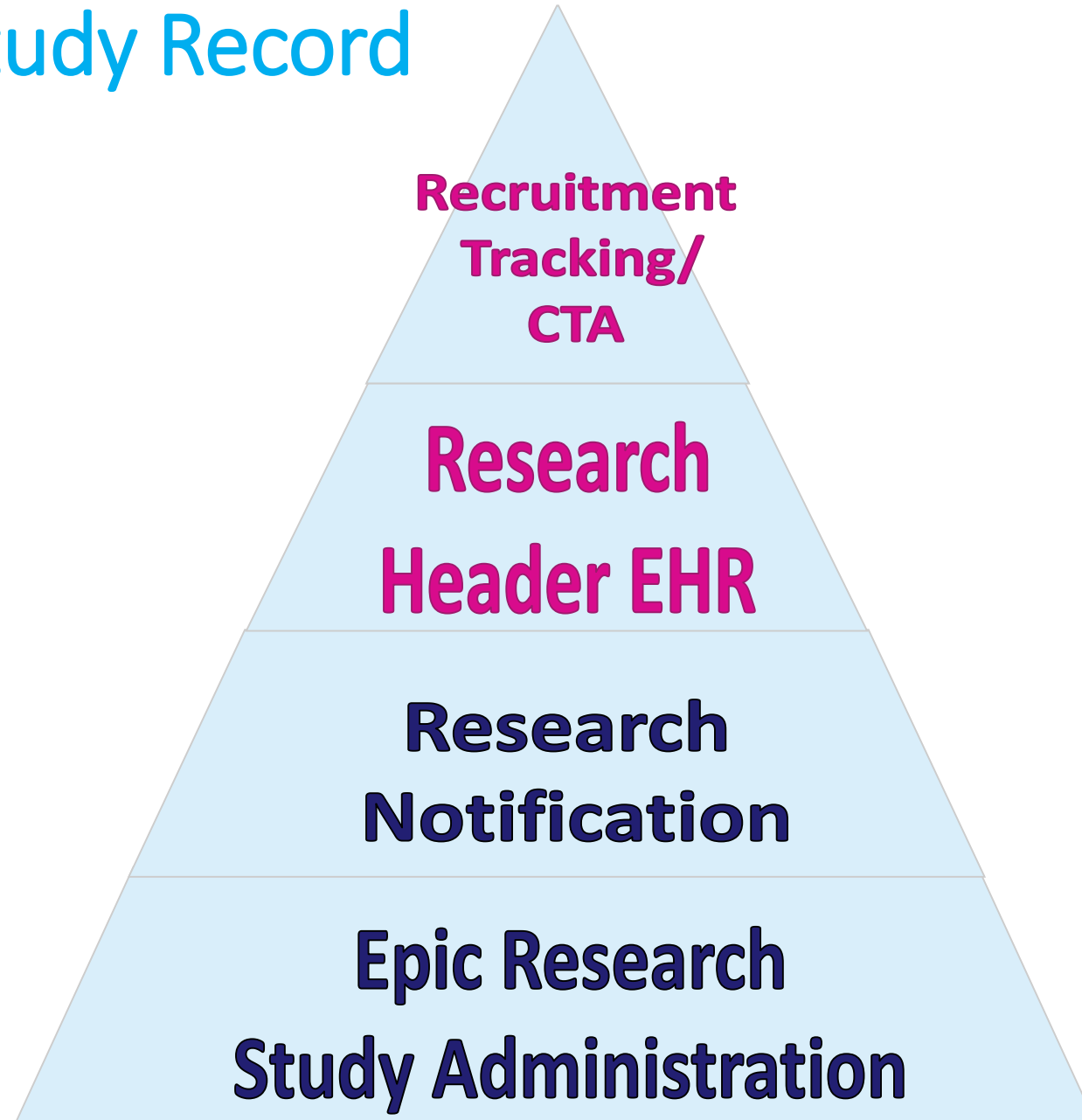
2025 plans: raise awareness through announcements and training

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

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 \(service-now.com\)](https://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 \(service-now.com\)](https://service-now.com)

Epic Research Study Record (RSH)

Request to create a research study protocol record.



Request to create a research study protocol record.

RESEARCH STUDY RECORD REQUEST

* Requested for ?

* Contact Phone

* Email

* Life Number

* Request Type ?

Request can be placed only when IRB Number is available. ✖

Existing Research Study Record update

-- None --

Request for Research Study Record creation

Existing Research Study Record update

Study Closure

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

The screenshot displays a patient's medical record interface. On the left, a sidebar shows patient information for Alfred Zztest, including MRN, language, and a 'Research Participant' status highlighted with a red box. The main area is titled 'Research Studies' and shows details for the 'Mount Sinai Kidney Precision Medicine Project'. A red box highlights the 'Participant Details' section, which includes the status 'Enrolled' and the effective date '10/13/2023'. Below this, the 'Study Details' section is visible, showing study code, IRB#, and NCT#.

Research Studies

[View Study List](#)

Mount Sinai Kidney Precision Medicine Project

Participant Details

Status	Status Effective Date
Enrolled	10/13/2023
Active Start Date	Active End Date
10/13/2023	—

Study Details

Study Code	IRB#	NCT#
21-1000	21-1000	21-1000

Description
The NIH-funded Mount Sinai Kidney Precision Medicine Project proposes biopsies and enrollment in a longitudinal biorepository and database of

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:

Appointment Desk

Book It Walk In Request Reports Patient Options Printing

Patient Summary (Edit)

Zztest, Epictwo (69 yrs) DOB: 9/8/1954 Registration Status: Elapsed Mobile: E-mail: testing@test.com

Link to Research Study

EVA

Enrolled Study Code: IRB# Principal Investigator

18-00101 18-00106 Jessica Robinson-Papp, MD

Link encounter

Close

Guarantor Accounts

Future Past Referrals Admissions Active Requests Finalized Requests

Visit Type	Notes	Rescheduled	Linked Requests	Referral	Has Linked Appt?	Or...	Auth Status	DT L
3 MAIN	LAB WORK CC [2426]	labs						

Registration:

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 More

Research Encounter Association

Research Studies

Enrolled Study Code: IRB# Principal Investigator

18-00101 18-00106 Jessica Robinson-Papp, MD

Link encounter

Enrolled Study Code: IRB# Principal Investigator

18-00101 18-00106 Alexander (Hans) M.

Link encounter

Enrolled Study Code: IRB# Principal Investigator

18-00101 18-00106

Link encounter

Close









Previous Next

Research Linkage is visible in Chart Review










Q2 2024

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)
2 Years Ago					
	12/28/2021		Anesthesia Event	MSH PERIOP	Mount Sinai Hospital (LOC)
	12/28/2021		Pre-admit (Canceled)		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)

Left Sidebar:

PP

Preffirst Preflast

Legal: **Kennyone Middle Zttest 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, Droplet, Droplet, Contact, Spec Droplet**

Research Participant

Anita Chekuri, MD
PCP - General
Coverage: New York Medical...

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

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About Epic

Epic Documentation Guides

Epic Additional Resources

Clinical

Hospital Billing

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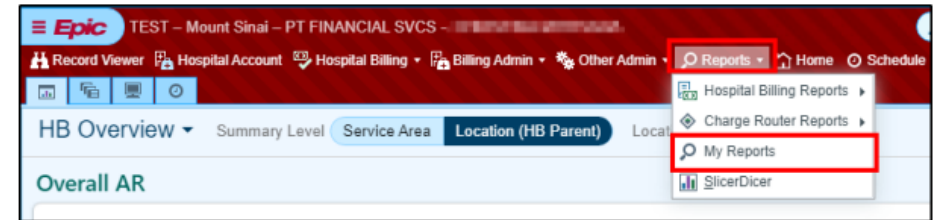
- Classroom Materials
- Biller Account & Claims
- Customer Service & Self-Pay
- Insurance Follow-Up & Denials
- Leadership
- Payment Poster
- Research Biller

Research Billing Review

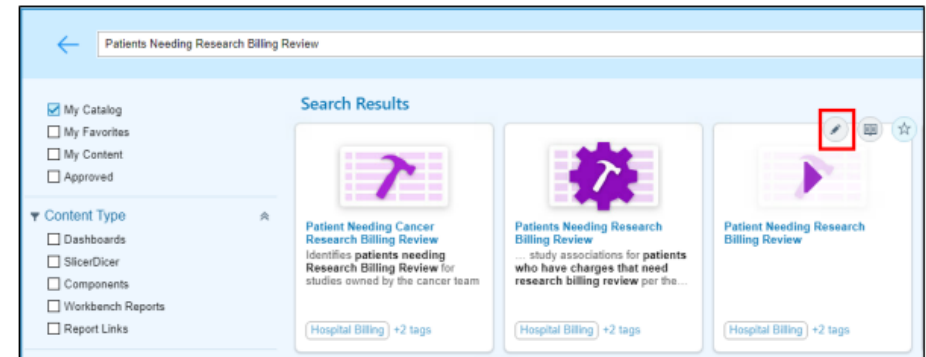
Patients that are enrolled in research study programs will need to have their encounter review. The review will be done by running a report within Epic.

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.



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 displays the Epic In-Basket interface. On the left, the 'My Messages' list includes 'Post Mortem' (0/7), 'Research ADT Event Notification' (0/1), 'Appointment Notification' (1/4), 'Rx Request' (0/4), 'Orders' (71/72), 'My Open Charts' (16/16), 'My Open Encounters' (2/2), 'Staff Message' (15/18), 'COVID-19 Vaccine Cards' (0/2), 'EM Video Visit' (0/3), 'Letter Queue' (0/4), 'My Unsigned Orders' (3/3), 'MyChart - Request Medical Advice' (0/1), 'MyChart Administration' (11/11), and 'New Account Request' (10/18). The 'Appointment Notification' is highlighted. A red box around the 'Appointment Notification' is labeled 'In Basket Message Types related to research'. A red box around the 'Research Studies' icon in the top navigation bar is labeled 'Jump to the Research Studies activity'. The main content area shows a list of appointment notifications for 'Radiant, Spiderman [B125601]' and 'Test, Misha [T317077]'. The right pane displays 'Research Info' for a 'Proof Of Concept Study' linked to an appointment on 10/2/2023. The study details include: Status: Enrolled (9/25/2023), Active Start Date: 9/22/2023, Last Modified: 9/25/2023 10:17 AM by [User], and a Linkage History table showing a linkage on 10/02/2023 10:23 AM. The study type is 'Basic Science'.

In Basket Message Types related to research

- Post Mortem 0/7
- Research ADT Event Notification 0/1
- Appointment Notification 1/4**
- Rx Request 0/4
- Orders 71/72
- My Open Charts 16/16
- My Open Encounters 2/2
- Staff Message 15/18
- COVID-19 Vaccine Cards 0/2
- EM Video Visit 0/3
- Letter Queue 0/4
- My Unsigned Orders 3/3
- MyChart - Request Medical Advice 0/1
- MyChart Administration 11/11
- New Account Request 10/18

Jump to the Research Studies activity

Appointment Notification 1 new, 4 total

Status	Sent Date	Patient
Read	10/18/2023	Radiant, Spiderman [B125601]
Action: Appointment Changed Comment:		
Read	12/19/2023	Test, Misha [T317077]
Action: Appointment Missed Comment:		
Read	03/04/2024	Radiant, Spiderman [B125601]
Action: Appointment Missed Comment:		
New	03/04/2024	Radiant, Spiderman [B125601]
Action: Appointment Missed Comment:		

Research Info

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 [User]

Linkage History:

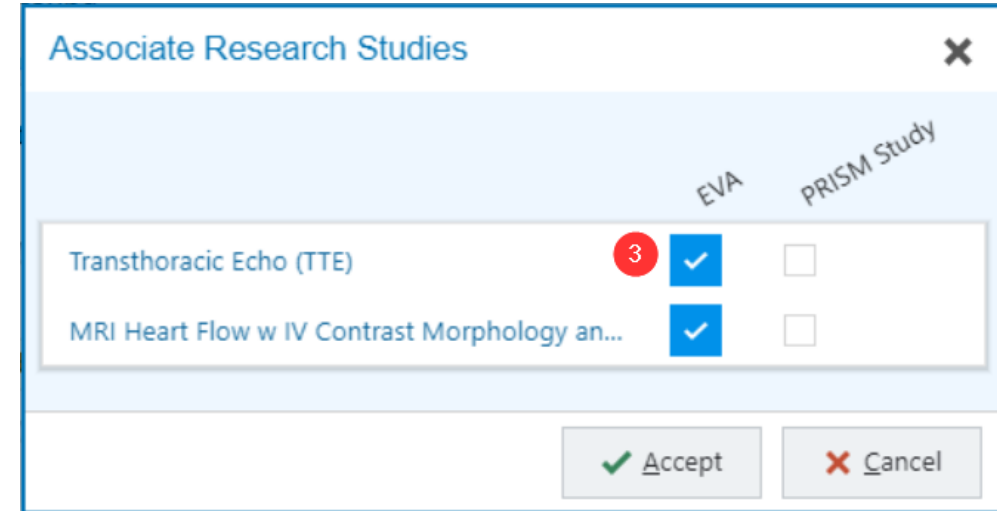
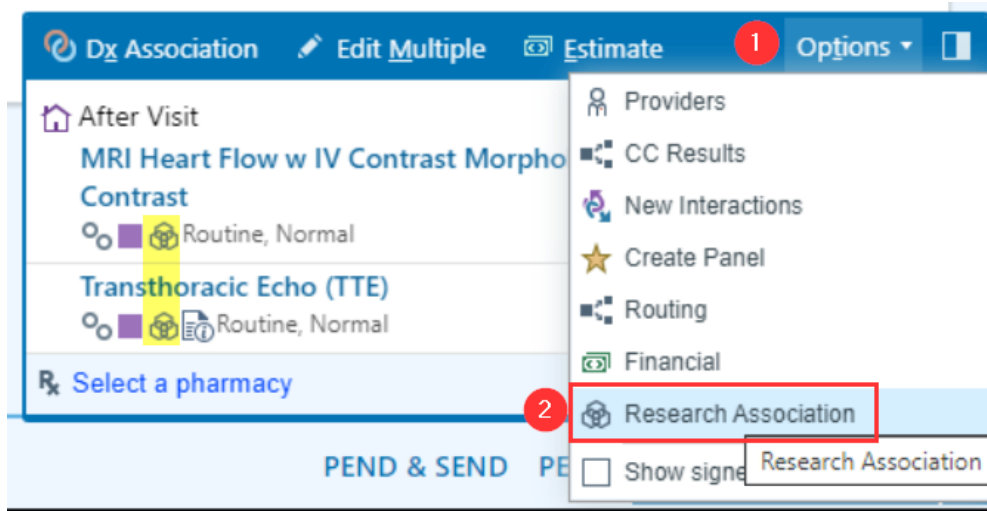
Date and Time	Action	Protocol	Treatment Day	User
10/02/2023 10:23 AM	Linked			[User]

Proof Of Concept Study

Principal Investigator: [User]

Study Type: Basic Science

Indicate an Order as Related to Research

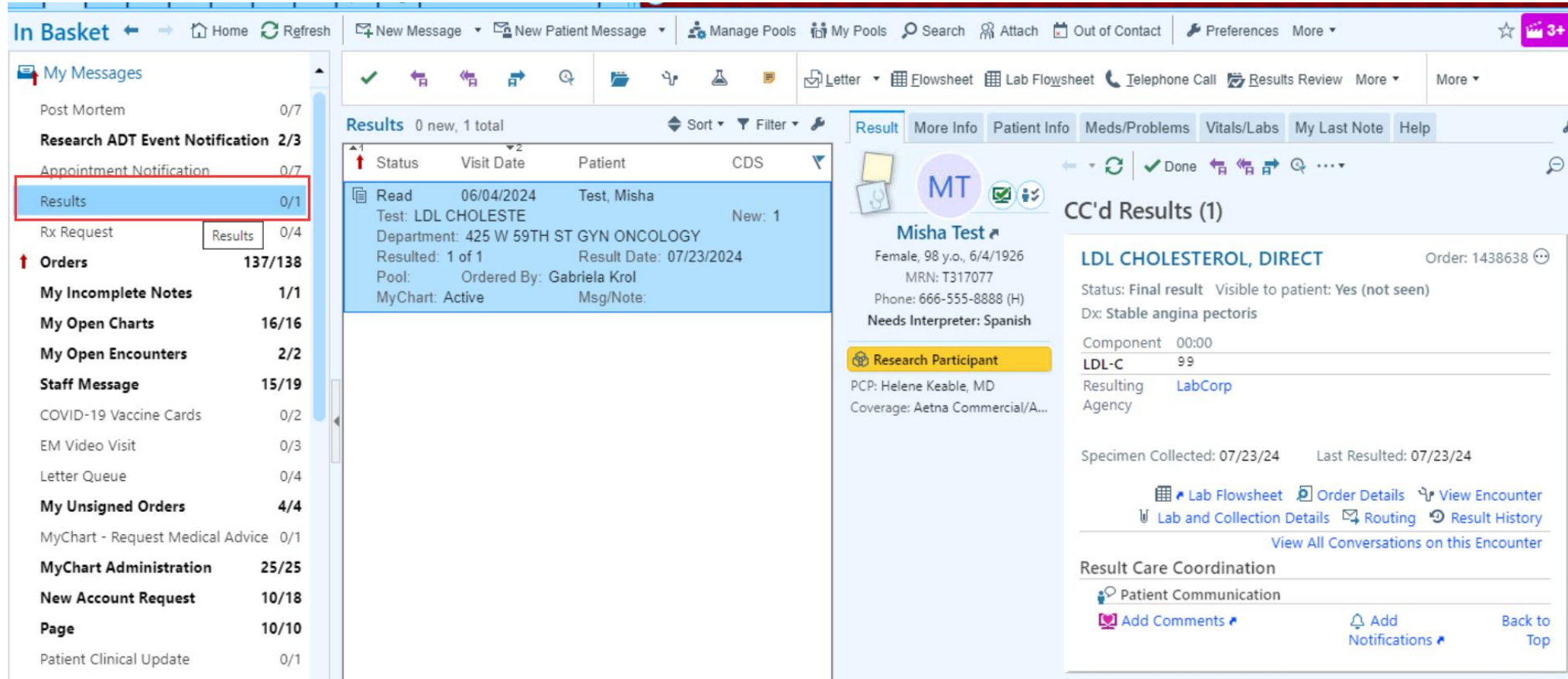


Available for all specialties now and anyone user who is placing research related orders [MDs, NPs, PAs, etc]

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 displays the Epic In Basket interface. On the left, the 'My Messages' sidebar lists various message types, with 'Results' highlighted in blue and showing 0/1 items. The main content area shows a 'Results' tab with a table of results. The table has columns for Status, Visit Date, Patient, and CDS. A single result is listed: 'Read' status, '06/04/2024' visit date, 'Test, Misha' patient, and 'CDS' category. The test is 'LDL CHOLESTE', with a department of '425 W 59TH ST GYN ONCOLOGY'. The result date is '07/23/2024'. The pool is '1 of 1', ordered by 'Gabriela Krol'. The MyChart status is 'Active' and the message note is present.

On the right, the 'Misha Test' details are shown, including patient information (Female, 98 y.o., 6/4/1926, MRN: T317077, Phone: 666-555-8888 (H), Needs Interpreter: Spanish) and a 'Research Participant' badge. Below this, the 'CC'd Results (1)' section shows the 'LDL CHOLESTEROL, DIRECT' test with order number 1438638. The status is 'Final result' and 'Visible to patient: Yes (not seen)'. The Dx is 'Stable angina pectoris'. The component is '00:00', the LDL-C is '99', and the resulting agency is 'LabCorp'. The specimen was collected on 07/23/24 and the last result was on 07/23/24. Links for 'Lab Flowsheet', 'Order Details', 'View Encounter', 'Lab and Collection Details', 'Routing', and 'Result History' are provided. At the bottom, there is a 'Result Care Coordination' section with 'Patient Communication' and 'Add Comments' and 'Add Notifications' buttons.

CC options:

- PI and Coordinators
- Only PI
- Only Coordinators

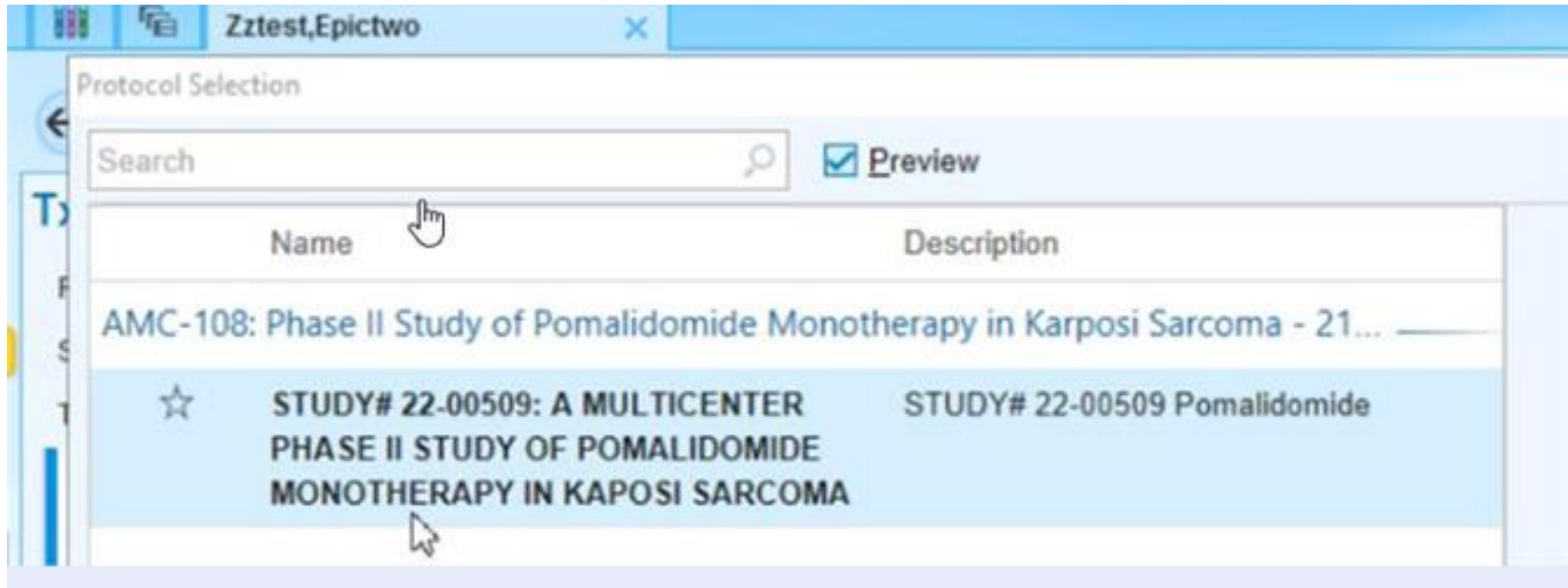
Requirements:

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



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

1 **Dx Association** Edit Multiple 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 516-775-2811

2 **Research Association**

Providers
CC Results
New Interactions
Create Panel
Routing
Financial
Show signed orders in orders cart

PRINT AVS 2 PEND ORDERS (1)

Dx Association Edit Multiple 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

3 **Pend & Send**

Remove All

PRINT AVS 2 PEND ORDERS (1)

Send Pending Orders

High Low

+ My List + Care Team + Encounter Provider + Authorizing Provider + Ordering Provider

4 Joseph Kannry, MD x

Pool for Responses: Add a pool

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

Insert SmartText 100%

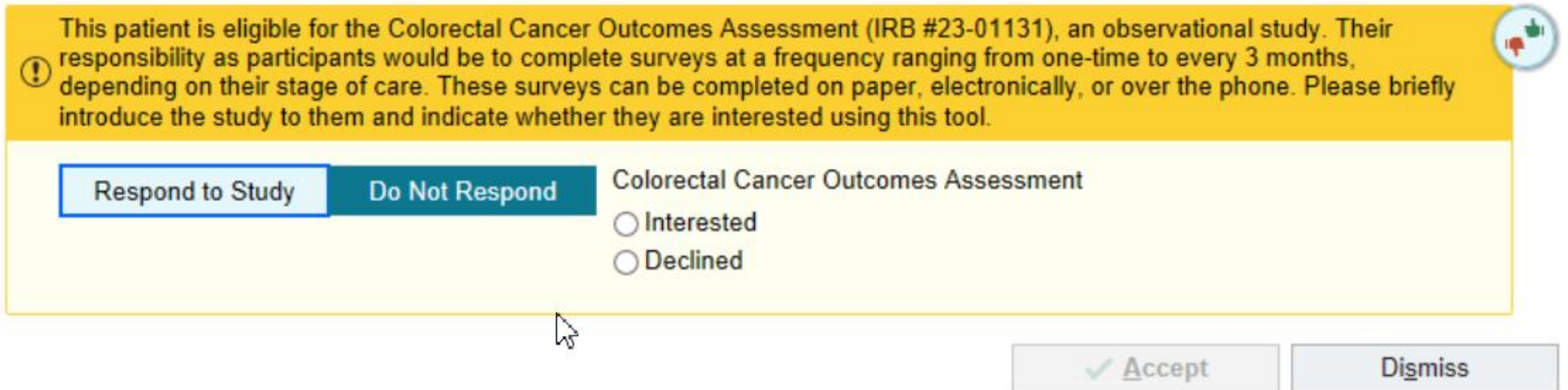
5 Send and Close Workspace Send Cancel

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

Epic Research Accruelement

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.

Colorectal Cancer Outcomes Assessment

☐ Interested

☐ Declined

The screenshot shows a yellow alert box with a warning icon on the left and a thumbs-up icon on the right. Inside the box, there is a text block explaining the study. Below the text, there are two buttons: 'Respond to Study' (highlighted with a blue border) and 'Do Not Respond'. To the right of these buttons, the text 'Colorectal Cancer Outcomes Assessment' is followed by two radio button options: 'Interested' and 'Declined'. At the bottom of the slide, outside the alert box, are two more buttons: 'Accept' (with a green checkmark icon) and '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

MyChart by Epic Log out

Your Menu Appointments & Visits Messages Test Results Ask a Question

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](#).

Last updated: Sep 13, 2023 11:21 AM


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

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 patient portal interface. At the top is a blue header with the MyMountSinai logo and navigation links: Your Menu, Appointments & Visits, Messages, Test Results, and Ask a Question. On the right of the header are links for MyChart by Epic, a globe icon, and a Log out button. Below the header is a user profile section for Janet Switch. The main content area is titled "Research Preference Profile". It contains two questions: "Would you consider participating in research studies as a healthy volunteer?" with "Yes" and "No" buttons, and "Which areas of research would you be interested in?" with a multi-select dropdown menu. The dropdown menu lists various medical fields: Allergies & Immune System, Blood, Heart, & Circulation, Bones, Joints, & Muscles, Brain & Nervous System, Cancer, Child Health, Diabetes, Digestive System & Liver, Drug/Alcohol/Substance Dependence, and Ears, Nose, & Throat. At the bottom of the form are "Continue" and "Cancel" buttons. On the right side of the form, there are two sections: "Participation Preferences" and "Related Links". The "Participation Preferences" section explains that preferences will help with research opportunities. The "Related Links" section includes a bell icon and a link to specify how to receive MyMountSinai notifications for research.

MyMountSinai

MyChart by Epic Log out

Your Menu Appointments & Visits Messages Test Results Ask a Question

Research Preference Profile

Would you consider participating in research studies as a healthy volunteer?

Many studies also need healthy volunteers for comparison purposes, so you don't necessarily have to have a condition to help researchers.

Yes No

Which areas of research would you be interested in?

Select all that apply.

- 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

Continue Cancel

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


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





J

Switch

Log out

Research Studies

Participation Preferences ▾

Active Studies

^ Smoking Cessation StudyEnrolled

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.

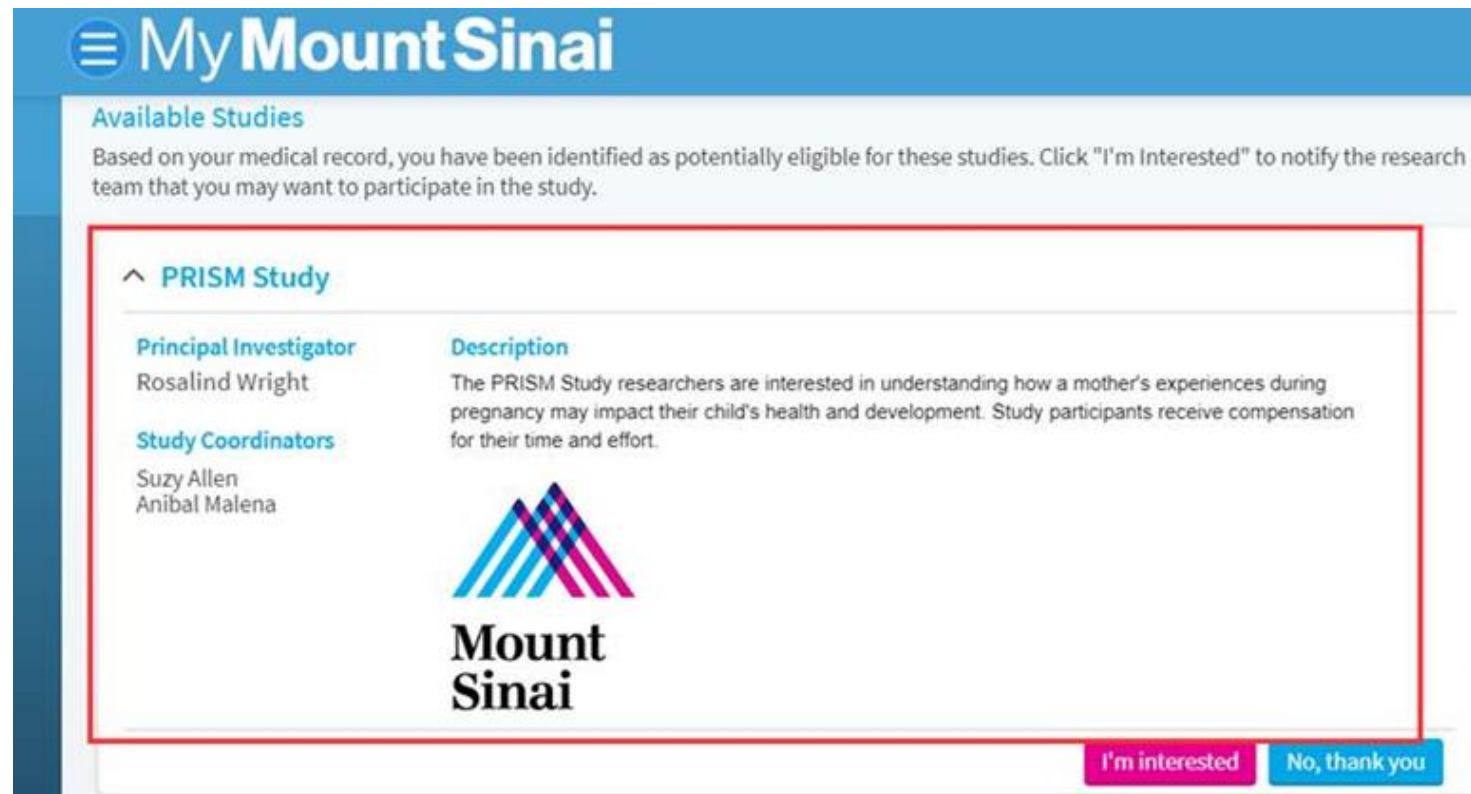
Related Links



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



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 Escalation2/10

Patient Questionnaires272/455

Pt Activation Code Request0/10

Pt Advice Request33/82

Pt CRM Request2/16

Pt Hx Questionnaires0/2

Pt Information Update0/3

Pt Non-Clinical Update3/6

Pt Rx Request0/19

Pt Schedule Request569/603

Reporting Workbench3/3

Research Recruitment0/1

Unv Lab Notif0/1

Video Visit0/3

Attached & Covering Users0/0

Research Studies

Msg to Pt

Research Recruitment0 new, 1 total

SortFilter

Msg Date

Patient

10/09/2023 09:00 AM

Zztest, Novatwo

Research Study: TEST [TEST]

Pool?: NO

Comment:

Message

Patient Info

Meds and Problems

Vitals and Labs

Help

NZ

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	Enrolled
MS-275 FOR MDS, AML, CHRONIC ML	
eMERGE IV	Enrolled

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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


Home > All Catalogs > Epic Service Catalog > EPIC > Epic MyChart for Research Recruitment

Epic MyChart for Research Recruitment

Use this form to submit requests for using the MyChart for Research Recruitment feature

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

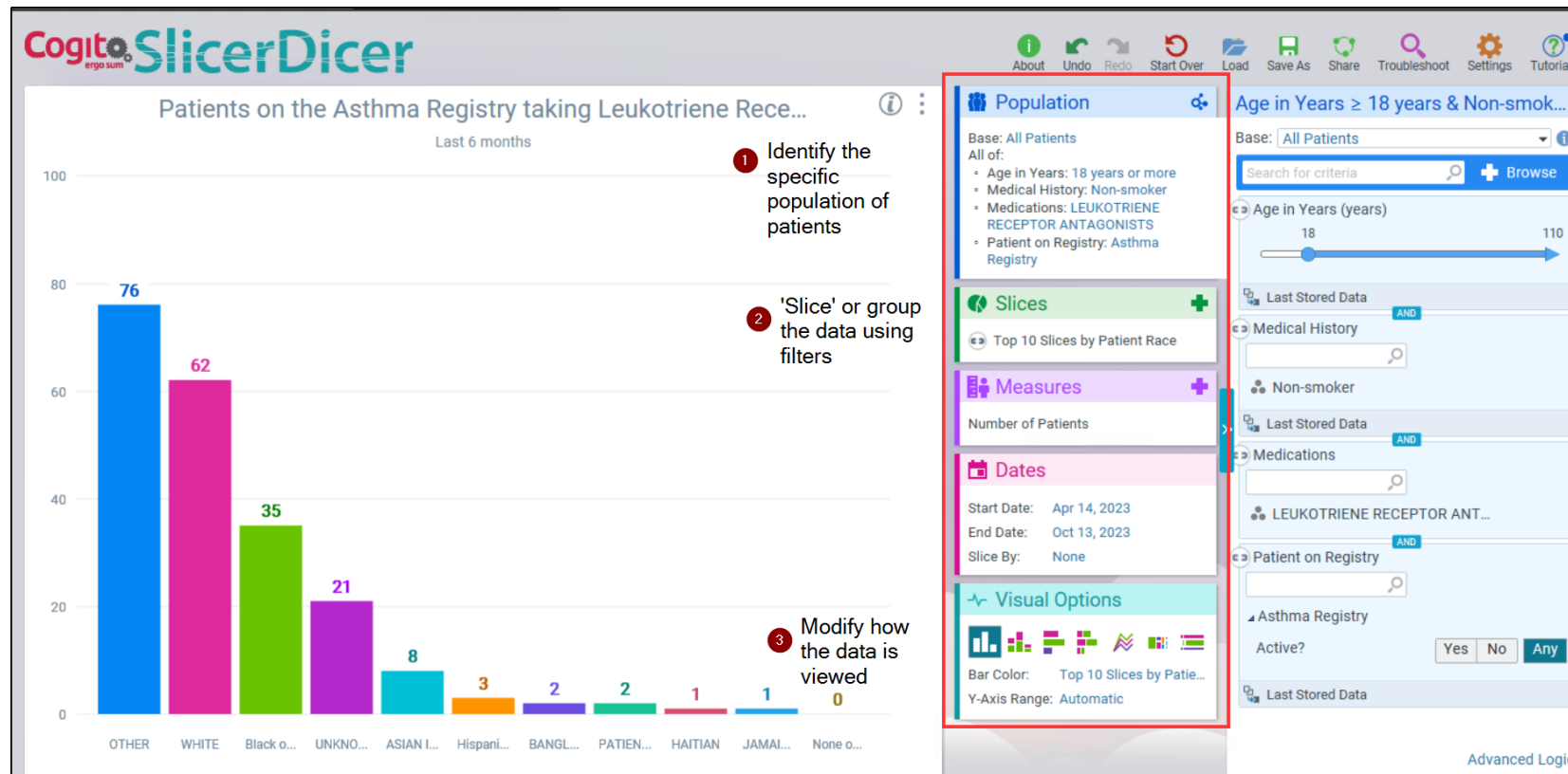
A research record must exist in Epic in order to use this feature. Please submit a 'Epic Research Study Record (RSH)' request if the study is not yet in Epic.

* Requested for 

* Contact Phone

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.

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	✓	✓	✓	X
Limited CRC Training	X	✓	✓	X
Radiant Research Coordinator Training	X	X	X	✓
View Only Training	X	X	X	X

DTP Intranet for Research Tip Sheets

Mount Sinai DTP Intranet

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


MSHS INTRANETS

DIRECTORIES

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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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