

Research – Research Administrators

PURPOSE: Research Administrators will request access for Study Monitors to view patient information using Epic Link.

The URL to the production LINK Site: <u>https://epiccarelink.med.utah.edu</u>. You need to use: Safari/Chrome/Firefox/Microsoft Edge. Research Admins can give Research Monitors access to studies.

Study Monitor – Auditor who comes in and observes the study to make sure it's done correctly.

Study (Research Coordinator) Coordinator – Work with the patients, finding research, documentation, placing the orders. Run the show.

Principal Investigator - Provider who signs the study.

Research Administrators – Small group – work with RCs when a study monitor needs access to monitor a study.

Click a link below to jump to a topic in the Tip Sheet:

- Research Administrators Using Epic Link
- <u>Requesting Access for a New (Study Monitor) User</u>
- <u>Requesting Patient Access for Existing Research Study Monitors</u>
- <u>Research Administrators Removing a Study Monitor (Deactivate)</u>

Research Administrators – Using Epic Link

1. Research Administrators – Use your UID and password to login to the Epic Link website.



Note: The first time you login you'll need to set up security questions.

energe questions may be used to remy your identity in ned or a passivo	al mease choose a questions and their and	iners beion
UESTIONS	ANSWERS	
0		1
Q		
You must answer all of the questions you have select	ed Accept and Continue	× Skip

2. Link will only be used to request access for Study Monitors by Research Administrators.

LINK	Ame In	Basket	Admin					Menu	C+ Log Out
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						Manage My Clinic	View In Basket		
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3. As a Research Administrator, click Manage My Clinic.



- 4. In the My Groups tab you will see a list of all the Study Monitors that have Link access.
 - a. First and Last Name of the Study Monitor that has Link access.
 - b. Login ID for Link
 - c. Email address we have on file
 - d. Change the users password if needed

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My Groups Account R	equests					R R R	0
All Groups	v.						
Name *	Login ID	Provider	C Email	Enrolled In 2FA	Last Login		
Research, Amanda	RESEARCHAMANDA	No	test@testing.com	No		d 🕴	-
Research, Lexi	RESEARCHLEXI	No	test@pfizer.com	No		Ŧ	-
Research, Mark	RESEARCHMARK	No	test@testing.com	No	11/17/2022 8:10 AM	1	-
Research, Newt Test	RESEARCHNEWT	No	test@research.com	No	11/17/2022 8:18 AM	-	-
Research, Reginald	REGINALDRESEARCH	No	test@linktest.com	No			-
Test, Link Research	RESEARCHTEST	No	emily.johnson1@hsc.utah.edu	No	11/9/2022 1:51 PM	-	-
Test, Link Research Site Admin	RESEARCHADMIN	No	emily.johnson1@hsc.utah.edu	No	11/17/2022 10:14 AM	7	
Testing, John Doe	STUDYMONITORJOHN	No	test@testin.gomc	No		-	-

Note: You can also get to account requests from the menu in the top right corner > Admin > Account Requests.

LINK	Home In Basket Admin						Menu Log Out	Epic
	My Groups Account	t Requests				Home		
	✿ My Groups					In Basket	Settings	
	All Groups	~				Admin My Groups	a	
	Name	Login ID	Provider	Email	Enrolled In 2FA	Account Requests	Secure	
	Research, Amanda	RESEARCHAMANDA	No	test@testing.com	No			
		To TORNER PROPERTY AND		17 W.K. 2				

Last updated: 4/11/2024

Requesting Access for a New (Study Monitor) User

You will need to determine if a Study Monitor is new to getting Epic Link access, or if they are in the system and only need to be added to a study.

If you navigate to **My Groups** you can sort by last name to see if the Study Monitor has already been given Link access.

LINK	Home In Basket Pa	Schedules Patient Adm	n			Menu Log Out
	My Groups Ac	count Requests				
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				ABCD	E F G H I J K L M N O P Q R S T	U V W X Y Z < Clear
	Name	Login ID	Provider	Email	Last Login	i i i i i i i i i i i i i i i i i i i
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	₽ B		Yes			
	B		Yes			E - b
	B		Yes			<u> </u>
	B		Yes			
	0.000					Contraction of Contra

If you determine the Study Monitor <u>does not</u> have Link access you would follow the process below. If they <u>do</u> have Link access and need to be added to a patient study follow the steps requesting access for existing users.

1. While in Epic Link, Click **Account Requests**.

LINK	n n Basket Admin							Menu	C+ Log Out	Epic
	My Groups Account R	equests						58	0	
	Request New Account							6.3	U	
	Name	Status	•	Request Date	Email	Phone	Reference #			
	testing	Pending		10/25/22		435-658-9200	108942344			
	Test, Research Two	Pending		10/25/22	test@research.com	435-658-9200	108942346			
	Jones, James New	Pending		11/7/22	test@testingpfizer.com	435-658-9200	108942657			
	Research, Test Four	Pending		11/7/22	test@tesintpfizerexisting.com		108942659			
	Doe, Jane New Site	Pending		11/7/22	test@testingmoderna.com		108942661			
	Scamander, Newt	Pending	S	11/16/22	test@testinglink.com		108942905			
	Research, Existing Thelma	Pending		11/16/22	testing@testing.com		108942918		-	
	New Account Reference #: 108942344	Request				Requested by: 1	test, link research site adm	IN [131957]		
	A Site Information								Ĩ	
	testing				Phone: 43	5-658-9200			2	
	Luser/Provider Info	rmation							٦L	
	Clinical Staff									
	testing.john (Site admini	strator)	User IC): (Unspecified)				Pending		
	New Research Study Mo	onitor							2	
	tsting,ohfjdlaskfd		User ID): (Unspecified)	E-mail: test@tetsting.com Phone: 435-658-9200			Pending		
	Study Affiliation							*	-	
	What is the Study ID?			fdsfa						

2. Click Request New Account.

LINK	Home In Basket Admin							Menu	C+ Log Out	Epic
	My Groups Account Re	quests								
	Account Requests							R 72 10	0	
	+ Request New Account									
	Name	Status	*	Request Date	Email	Phone	Reference #		-	
	testing	Pending		10/25/22		435-658-9200	108942344			
	Test, Research Two	Pending		10/25/22	test@research.com	435-658-9200	108942346			
	Jones, James New	Pending		11/7/22	test@testingpfizer.com	435-658-9200	108942657			
	Research, Test Four	Pending		11/7/22	test@tesintpfizerexisting.com		108942659			
	Doe, Jane New Site	Pending		11/7/22	test@testingmoderna.com		108942661			
	Scamander, Newt	Pending	63	11/16/22	test@testinglink.com		108942905			
	Research, Existing Thelma	Pending		11/16/22	testing@testing.com		108942918			
									•	
	New Account Reference #: 108942344	Request				Requested by: 1	est, link research site adm	IN [131957]		

- 3. You will need to select from the following options:
 - a. New Research Study Monitor New to the Link system to monitor a study.
 - b. Existing Research Study Monitor Already in Link, have worked a study or multiple studies and are now going to be monitoring a new study.

LINK	Home In Basket Admin		Menu	G ⇒ Log Out	Epic
	My Groups Account Requests				
	Se New Account Request		ē	0	
	New Research Study Monitor	New Research Study Monitor			
	Existing Research Study Monitor	Existing Research Study Monitor			

- 4. In this example, select New Research Study Monitor.
- 5. Complete the required fields: Name, User Group, Email, Study ID (IRB) and Employer.

Se New Account Request ▷ New Research Study Monitor	ē 0
User Information Name [Last,First]: Smith, John Test	
SITE INFORMATION	
User group: Research Study Monitors 🗸	
Site name: Site NPI #: Phone:	
Fax:	
Address: City:	
State: ZIP: County:	
Country:	
BASIC INFORMATION	
Work e-mail: john@testcompany.com	
STUDY AFFILIATION	
What is the Study ID? (Enter the ID of the Study this user will be monitoring. You can enter more than one Study ID.) RSH Demo Study 12345678 What is the name of the Study Monitor's employer? Pfizer	
OTHER	
Comments: Study Monitor will be arriving Dec 20	

6. Click Submit Request.



- 7. Your request will get sent to the Epic Link IT team to create the users account.
- 8. Once the account is created the next time you login a Broadcast message will appear with a list of the newest users that need their temporary password set. Click the **Set temporary password for (user's Name)** hyperlink.

of your Li	Broadcast	Messages		nformation a
onnected. T	Date	Subject		GON AND CALL
	04/01/24	Set temporary password for John	n Doe	
_				-
p on s				
		🗁 Go to Messages	× Remind Me Later	

Note: You can also go to My Groups to see the list of User(s) that need their temporary passwords created click the user's **Name** hyperlink.

LINK	🕋 🔤 😍 🛅 😫 🔅		Happy Together Link	G Log Out
	My Groups My Facilities Account Requests			
	🌣 My Groups		23	0
	① Set Initial Password			
	Set the initial password for these users and let them know they can log The first time a user logs in they will be required to set their own pass Stuff, Test	i in with their User ID and initial password. rerd.		

9. The message window opens and click the Set Temporary Password hyperlink.

essage	
A new ac	count has been created for John Doe.
Next Ste	ps:
1. Set Ter	nporary Password
2. Let the User II	user know they can log in with their User ID and temporary password D: JDOE.LINKUSER
The first t	ime a user logs in they will be required to set their own password.

10. The change password window opens you will create the temporary password for the new user and click **Accept**.

lo			No
10	-	<u></u>	
lo	Change Password for D	OE, JOHN	×
10	New Pareward	Verify New Par	countrel .
10	New Password	Veniy ivew Pa	A
lo			•
10	Password for CERVANTES,	VANESSA	
s		θ	
0		Accept	Cancel
0		-	
0	tera@ad	vancedneurosurge	No

Note: The password must be 8 characters or longer and contain at least one alphabetic, one numeric, and on special character (e.g.!#@\$)

11. Click **OK** to Communicate User ID and password to the new User(s).



12. You can re-access the historical Broadcast messages from the **Broadcast Message** folder in your In Basket.

LINK	Home In Basket Patien	t List Schedules	Patient Admin		
	My In Basket	My Messa	ages Broadcast		
	a My Messages	New Msg	Refresh Dane -	P to 10 Search Sort Prope	
		0	Status	Date	Subject
		0	Read	94/01/24	Set temporary password for John Doe
		0	Read	04/01/24	Set temporary password for New Staff
			Read	03/25/24	Set temporary pessword for Test Stuff
		0	Read	03/25/24	Set temporary pessword for Bob 1. Testing

13. The New Study Monitor will appear in your **My Groups**.

Requesting Patient Access for Existing Research Study Monitors

You will need to determine if a Study Monitor is new to getting Epic Link access, or if they are in the system and only need to be added to a study.

If you navigate to My Groups you can sort by last name to see if the Study Monitor has already been given Link access.

LINK	Home In Basket Patient	List Schedules Patient Admi	n			Menu Log Out
	My Groups Account	t Requests				
	🕸 My Groups					22 0
				ABCD	EFGHIJKLMNOPQRSTU	VWXYZ Clear
	Name	Login ID	Provider	Email	Last Login	â
	Ar		Yes			
	В		Yes			
	B		Yes			
	В		Yes			<u> </u>
	B B		Yes			
	0					Contract Discontinues in the second s

If you determine the Study Monitor does not have Link access you would follow the process shown for new users. If they do have Link access and need to be added to a patient study follow the steps below.

- 1. Click Account Requests, then Request New Account. LINK Â 🚽 🔹 🔅 E Menu G Epic Log Out My Groups Account Requests KA 0 52 + Request New Account Name Request Date Status Email Phone Reference # 10/25/22 435-658-9200 testing Pending 108942344 Test, Research Two Pending 10/25/22 test@research.com 435-658-9200 108942346 Pending 11/7/22 test@testingpfizer.com 435-658-9200 Jones, James New 108942657 Research, Test Four Pending 11/7/22 test@tesintpfizerexisting.com 108942659 Doe, Jane New Site Pending 11/7/22 test@testingmoderna.com 108942661 Scamander, Newt Pending 11/16/22 test@testinglink.com 108942905 Research, Existing Thelma Pending 11/16/22 testing@testing.com 108942918 · 0 0 0 Requested by: TEST, LINK RESEARCH SITE ADMIN [131957] New Account Request FI Site Information testing Phone: 435-658-9200 User/Provider Information **Clinical Staff** testing.john (Site administrator) Pending User ID: (Unspecified) New Research Study Monitor tsting,ohfjdlaskfd Pending User ID: (Unspecified) E-mail: test@tetsting.com Phone: 435-658-9200

2. Click Existing Research Study Monitor.



3. Complete the required fields: Name, User Group, Email, Study ID (IRB) and Employer.

* New Account Request	Existing Research Study Monitor	ē 0
	User Information Name [Last,First]: Robinson, Mary Test	
	SITE INFORMATION	
	User group: Research Study Monitors 🖌	
	Site name:	
	Site NPI #: Phone:	
	Fax:	
	Address: City:	
	State: ZIP: County:	
	Country:	
	BASIC INFORMATION	
	Work e-mail: mary@testcompany.com	
	STUDY AFFILIATION	
	What is the Study ID? (Enter the ID of the Study this user will be monitoring. You RSH Demo Study 12345678	
	What is the name of the Study Monitor's employer? Pfizer	
	OTHER	
	Comments: Mary will be monitoring an additional study	

4. Click Submit Request.



- 5. The Epic Link IT team will receive the request and add the Study Monitor to the study.
- 6. You can see the status of your request(s) in your Account Request activity. Once complete the Study Monitor will be able to login to Link with their existing credentials and search for and view the patient.

My Groups Account Requests Account Requests • Request New Account Research, Mark: Record Ge Research, Lexi Record Ge Jones, Emma Test Record Ge Research, New Test Complete	eneration Completed 11/17/22 eneration Completed 11/17/22	2	test@testing.com test@pf.zer.com		108942940	N.M.	0	
Account Requests Account Acco	eneration Completed 11/17/22 eneration Completed 11/17/22	2	test@testing.com test@pfzer.com		108942940	К.Я. И И	0	
Request New Account Research, Mark: Research, Lexi Research, Lexi Research, Amanda Record Ge Jones, Emma Test Record Ge Research, Newt Test Complete	eneration Completed 11/17/22 eneration Completed 11/17/22	2	test@testing.com test@pfizer.com		108942940			
Research, Mark Record Ge Research, Lexi Record Ge Research, Amanda Record Ge Jones, Emma Test Record Ge Research, Newt Test Complete	eneration Completed 11/17/22 eneration Completed 11/17/22	2	test@testing.com test@pfizer.com		108942940			
Research, Lexi Record Ge Research, Amanda Record Ge Jones, Emma Test Record Ge Research, Newt Test Complete	eneration Completed 11/17/22	2	test@pfizer.com					
Research, Amanda Record Ge Jones, Emma Test Record Ge Research, Newt Test Complete	the second se				108942944			
Jones, Emma Test Record Ge Research, Newt Test Complete	eneration Completed 11/17/22	2	test@testing.com		108942952			
Research, Newt Test Complete	eneration Completed 11/17/22	2	emmatest@pfizer.com	435-658-9201	108942954			
	11/17/22	2	test@utahdepofhealth.com		108942956			
Scamander, Newt Pending	11/16/22	2	test@testinglink.com		108942905			
Research, Existing Thelma Pending	11/16/22	2	testing@testing.com		108942918			
Scamander, Newt Record Ge	eneration Completed 11/16/22	2	test@testing.com		108942912		-	

Research Administrators – Removing a Study Monitor (Deactivate)

After the Release to Date (Max 5 Days) is reached the Study Monitor will automatically lose access to the patient. If the Study Monitor needs to be deactivated from Link you will do this from the My Groups activity in Link.

Note: Deactivating a Study Monitor will remove their Epic Link access completely.

1. Navigate to **My Groups**. Click **Deactivate**.

LINK	Home In Basket Admin						Menu	C+ Log Out	Epic
	My Groups Account R	lequests							
	🌣 My Groups						N N N	0	
	All Groups	*							
	Name	Login ID	Provider	Email	Enrolled In 2FA	Last Login			
	Jones, Emma Test	RESEARCHEMMA	No	emmatest@pfizer.com	No	11/17/2022 10:35 AM	8	-	
	Research, Amanda	RESEARCHAMANDA	No	test@testing.com	No		-	43	
	Research, Lexi	RESEARCHLEXI	No	test@pfizer.com	No		1	-	
	Research, Mark	RESEARCHMARK	No	test@testing.com	No	11/17/2022 8:10 AM	-	-	
	Research, Newt Test	RESEARCHNEWT	No	test@research.com	No	11/17/2022 10:44 AM	8	-	
	Research, Reginald	REGINALDRESEARCH	No	test@linktest.com	No		-	-	
	Test, Link Research	RESEARCHTEST	No	emily.johnson1@hsc.utah.edu	No	11/9/2022 1:51 PM	8	-	
	Test, Link Research Site Admin	RESEARCHADMIN	No	emily.johnson1@hsc.utah.edu	No	11/17/2022 10:45 AM	7	-	

2. Select the User Group, and enter a comment stating why they need to be deactivated. Click **Deactivate**.

All Groups	-						
Name	Login ID	Provider	Email	Enrolled In 2FA	Last Login		
Jones, Emma Test	RESEARCHEMMA	No	emmatest@pfizer.com	No	11/17/2022 10:35 AM	7	-
Research, Amanda	RESEARCHAMANDA	No	test@testing.com	No		7	-
Research, Lexi	RESEARCHLEXI	No	test@pfizer.com	No		2	-
Research, Mark	RESEARCHMARK	No.	test@testing.com	Als.	11/17/2022 8:10 AM	-	-
Research, Newt Test	RESEARCHNEWT	Deactivate		×	11/17/2022 10:44 AM	2	-
Research, Reginald	REGINALDRESEARCH	(1) You are about to de	activate Jones, Emma Test			-	-
Test, Link Research	RESEARCHTEST	Liser ID			11/9/2022 1:51 PM		-
Test, Link Research Site Admin	RESEARCHADMIN	131985			11/17/2022 10:45 AM	7	
Testing, John Doe	STUDYMONITORJOHN	User Group				2	-
		All Groups		*			
		Comment					
				_			
			- <u>D</u> e	activate X <u>C</u> ancel			

3. The request is sent to the Epic Link IT team to fully deactivate the user.