

## 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: <https://epiccarelink.med.utah.edu>. 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.

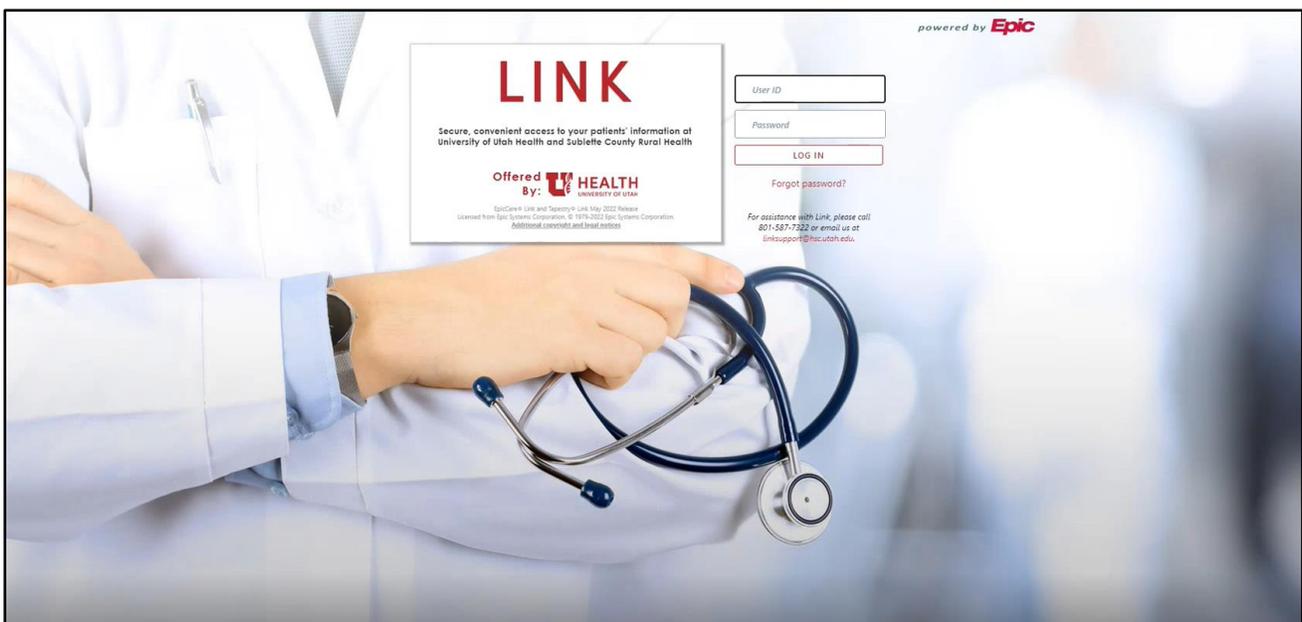
**Research Administrators** – Small group – work with RCs when a study monitor needs access to monitor a study.

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

- [Research Administrators – Using Epic Link](#)
- [Requesting Access for a New \(Study Monitor\) User](#)
- [Requesting Patient Access for Existing Research Study Monitors](#)
- [Research Administrators – Removing a Study Monitor \(Deactivate\)](#)

### 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.

**Challenge Questions Setup**  
 Challenge questions may be used to verify your identity in lieu of a password. Please choose 2 questions and their answers below.

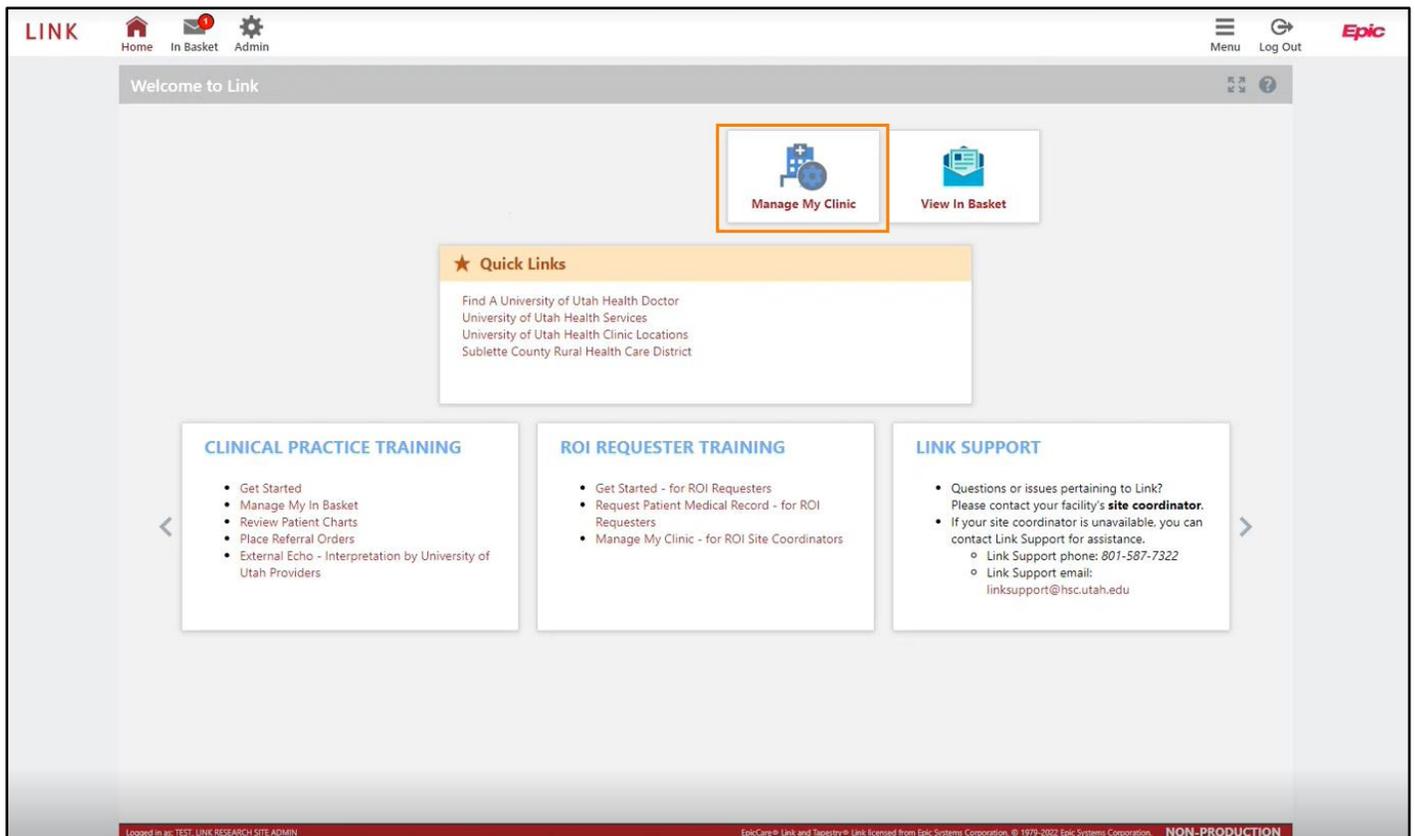
QUESTIONS	ANSWERS
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

You must answer all of the questions you have selected

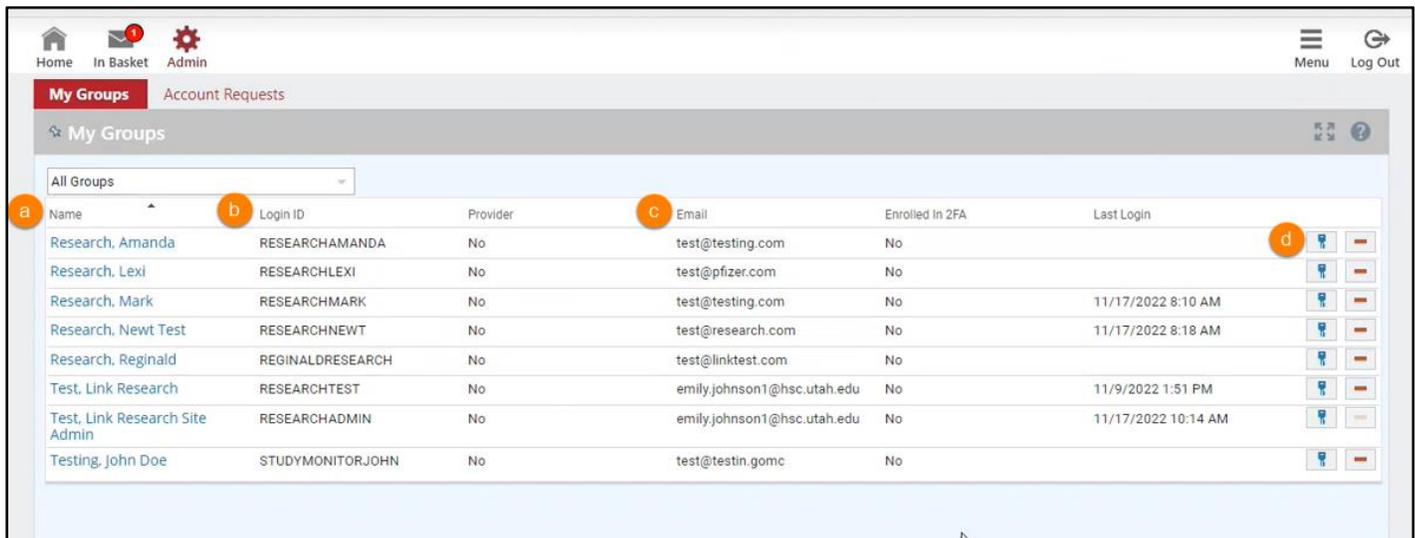
2. Link will only be used to request access for Study Monitors by Research Administrators.

The screenshot shows the LINK application interface. At the top left, the 'LINK' logo is displayed next to navigation icons for Home, In Basket, and Admin. On the top right, there are icons for Menu and Log Out. A 'Welcome to Link' banner is visible below the navigation. Two main action buttons are present: 'Manage My Clinic' and 'View In Basket'. Below these is a 'Quick Links' section with a list of links: 'Find A University of Utah Health Doctor', 'University of Utah Health Services', 'University of Utah Health Clinic Locations', and 'Sublette County Rural Health Care District'. At the bottom, there are three expandable panels: 'CLINICAL PRACTICE TRAINING' (with links like 'Get Started', 'Manage My In Basket', 'Review Patient Charts', 'Place Referral Orders', and 'External Echo - Interpretation by University of Utah Providers'), 'ROI REQUESTER TRAINING' (with links like 'Get Started - for ROI Requesters', 'Request Patient Medical Record - for ROI Requesters', and 'Manage My Clinic - for ROI Site Coordinators'), and 'LINK SUPPORT' (with information on contacting support via phone at 801-587-7322 or email at linksupport@hsc.utah.edu). A 'STUDY MONITOR TRAINING' section is also visible under the ROI Requester Training panel, with a 'Get Started - for Research Study Monitors' link.

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



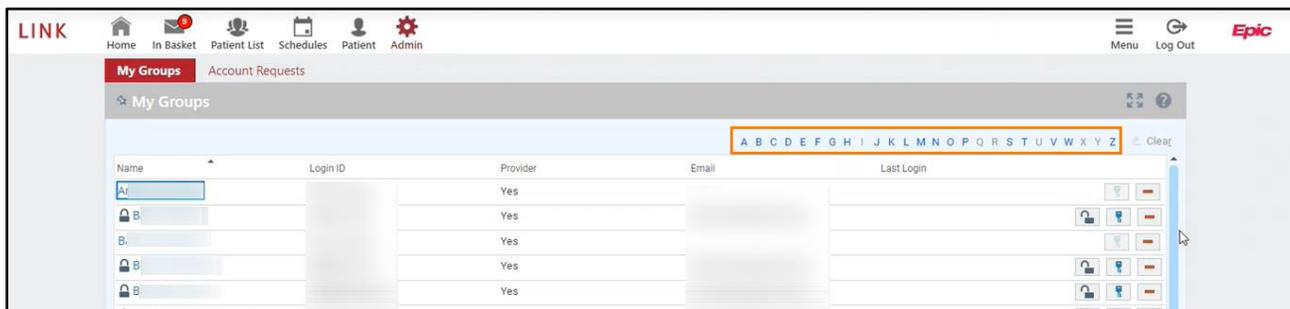
**Note:** You can also get to account requests from the menu in the top right corner > Admin > Account Requests.



## Requesting Access for a New (Study Monitor) User

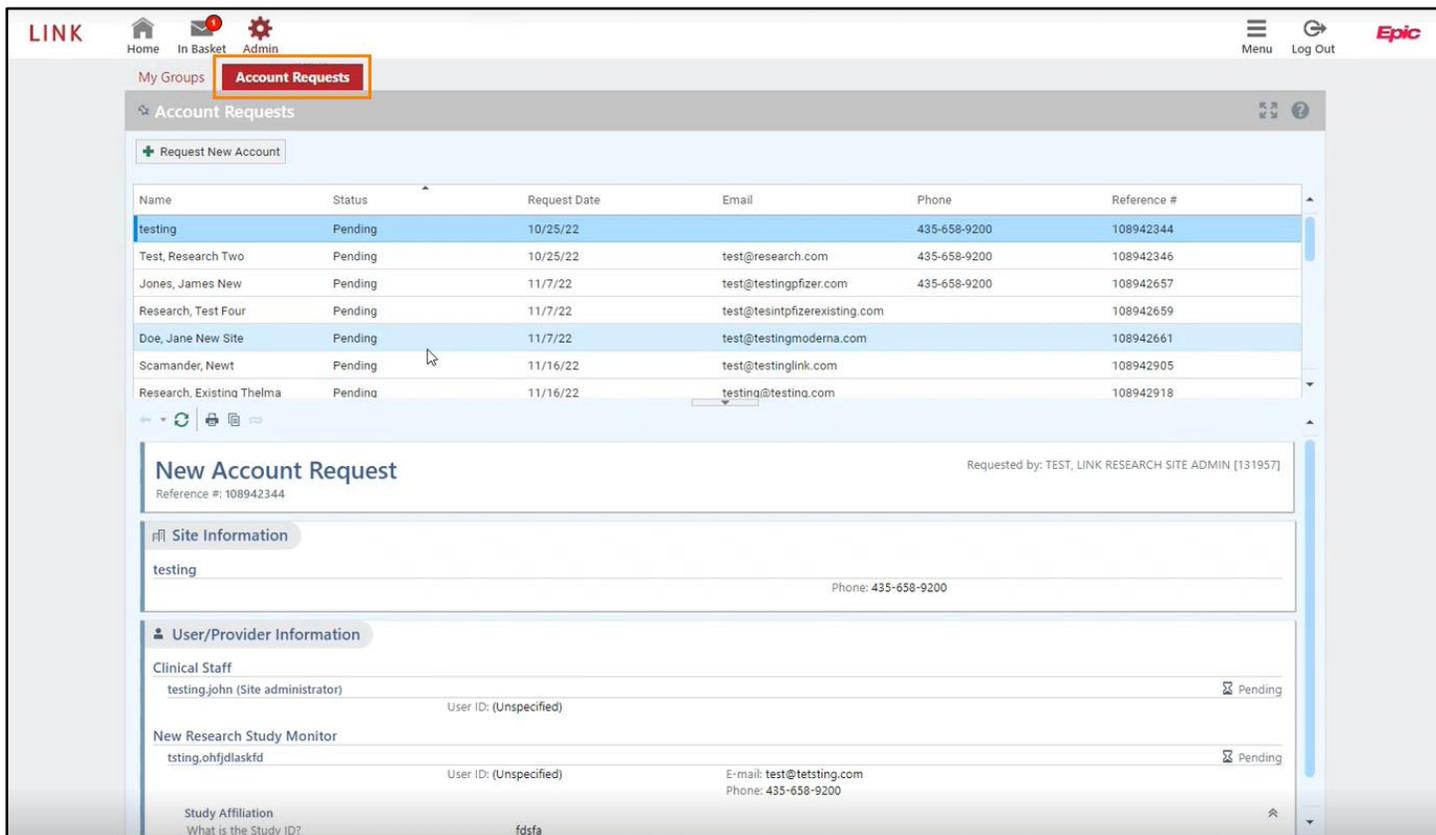
You will need to determine if a Study Monitor is new to getting Epic Link access, or if they are in the system and only need to be added to a study.

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

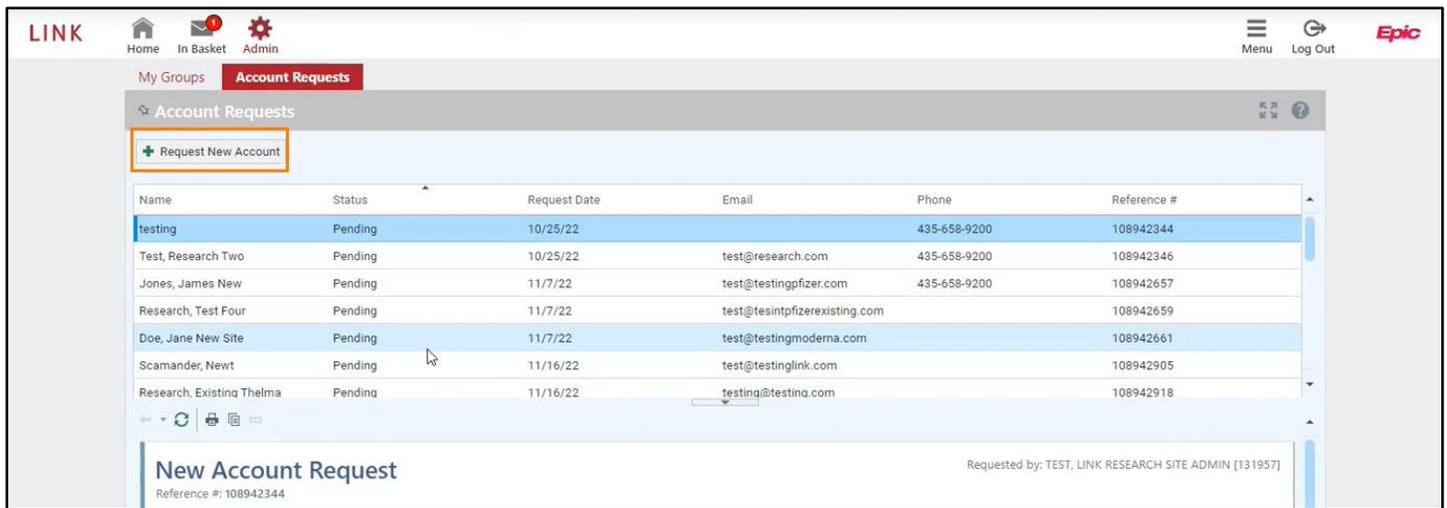


If you determine the Study Monitor does not have Link access you would follow the process below. If they do have Link access and need to be added to a patient study follow the steps requesting access for existing users.

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



### 2. Click **Request New Account**.



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.



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

New Account Request > New Research Study Monitor

**User Information**  
 Name [Last,First]:

**SITE INFORMATION**  
 User group:   
 Site name:  
 Site NPI #: Phone:  
 Fax:  
 Address: -- City: --  
 State: -- ZIP: -- County: --  
 Country: --

**BASIC INFORMATION**  
 Work e-mail:  ⚠ Work phone:

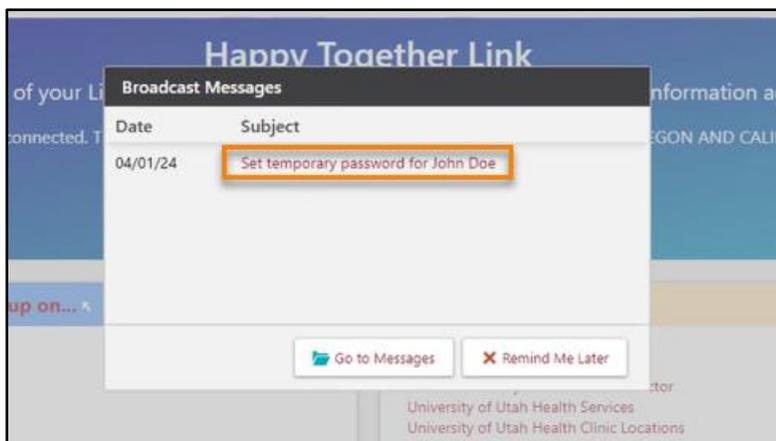
**STUDY AFFILIATION**  
 What is the Study ID? (Enter the ID of the Study this user will be monitoring. You can enter more than one Study ID.)   
 What is the name of the Study Monitor's employer?

**OTHER**  
 Comments:

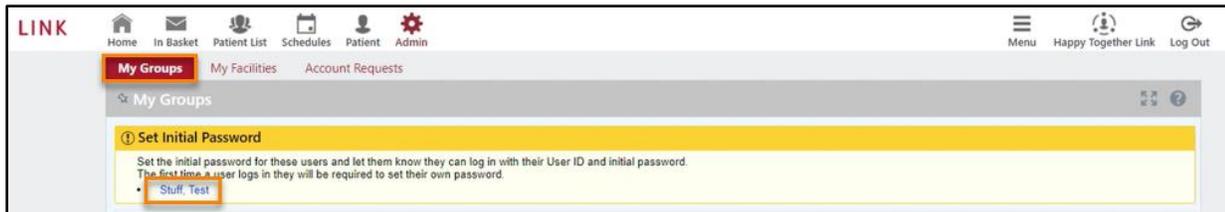
6. Click **Submit Request**.

7. Your request will get sent to the Epic Link IT team to create the users account.

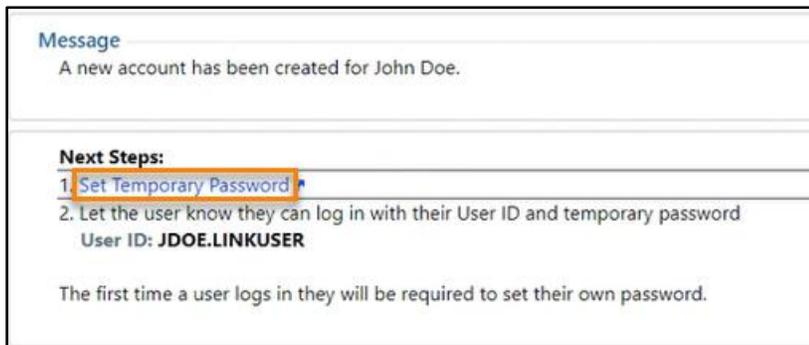
8. Once the account is created the next time you login a Broadcast message will appear with a list of the newest users that need their temporary password set. Click the **Set temporary password for (user's Name)** hyperlink.



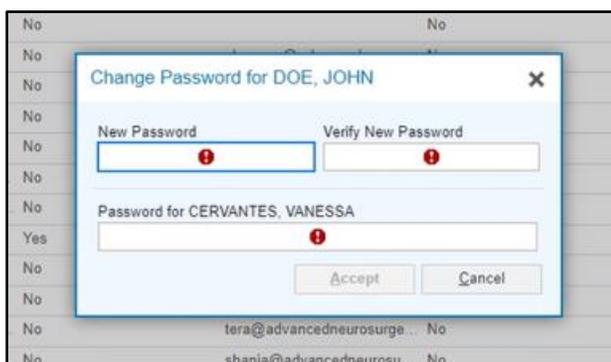
**Note:** You can also go to My Groups to see the list of User(s) that need their temporary passwords created click the user's **Name** hyperlink.



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

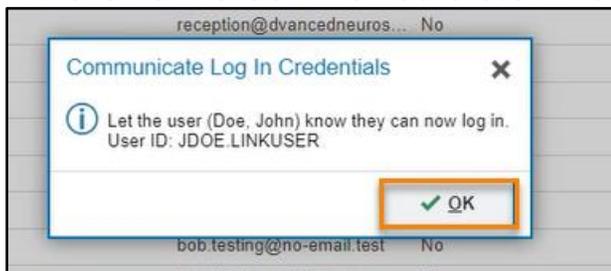


10. The change password window opens you will create the temporary password for the new user and click **Accept**.

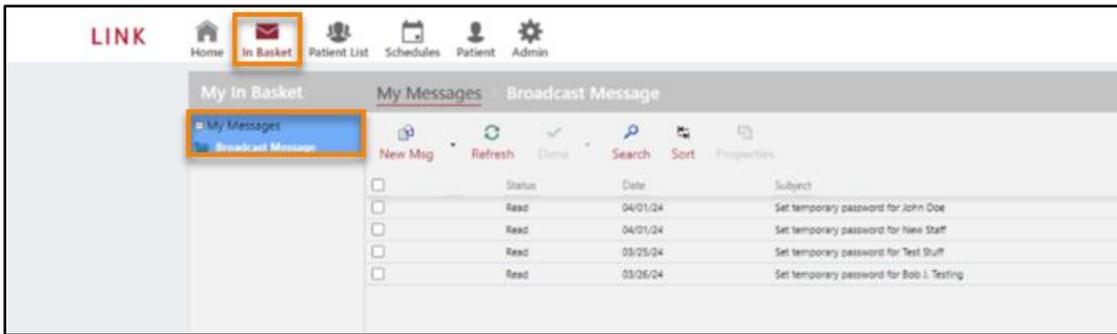


**Note:** The password must be 8 characters or longer and contain at least one alphabetic, one numeric, and one special character (e.g.!#@\$)

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.

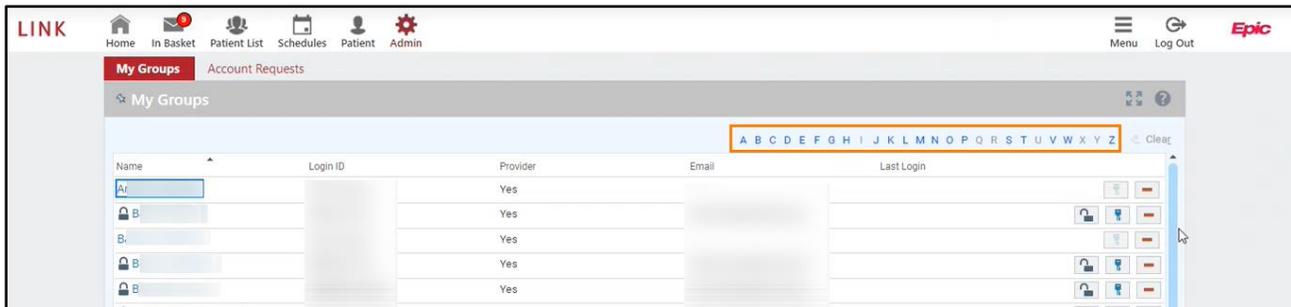


13. The New Study Monitor will appear in your **My Groups**.

## Requesting Patient Access for Existing Research Study Monitors

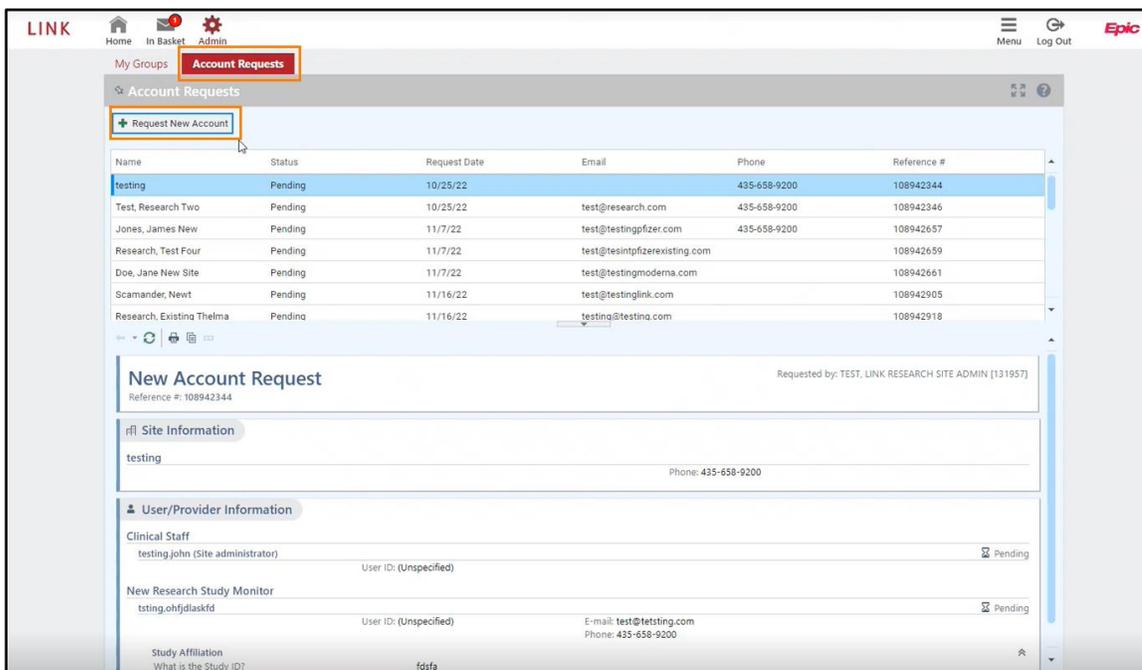
You will need to determine if a Study Monitor is new to getting Epic Link access, or if they are in the system and only need to be added to a study.

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

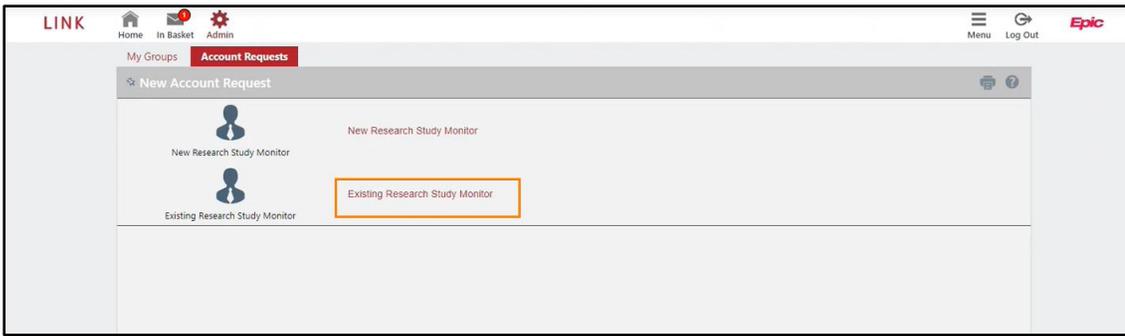


If you determine the Study Monitor does not have Link access you would follow the process shown for new users. If they do have Link access and need to be added to a patient study follow the steps below.

1. Click **Account Requests**, then **Request New Account**.



2. Click **Existing Research Study Monitor**.



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

**User Information**  
Name (Last,First): Robinson, Mary Test

**SITE INFORMATION**  
User group: Research Study Monitors

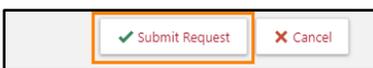
Site name:  
Site NPI #: Phone:  
Fax:  
Address: -- City: --  
State: -- ZIP: -- County: --  
Country: --

**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 can enter more than one Study ID.) 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.

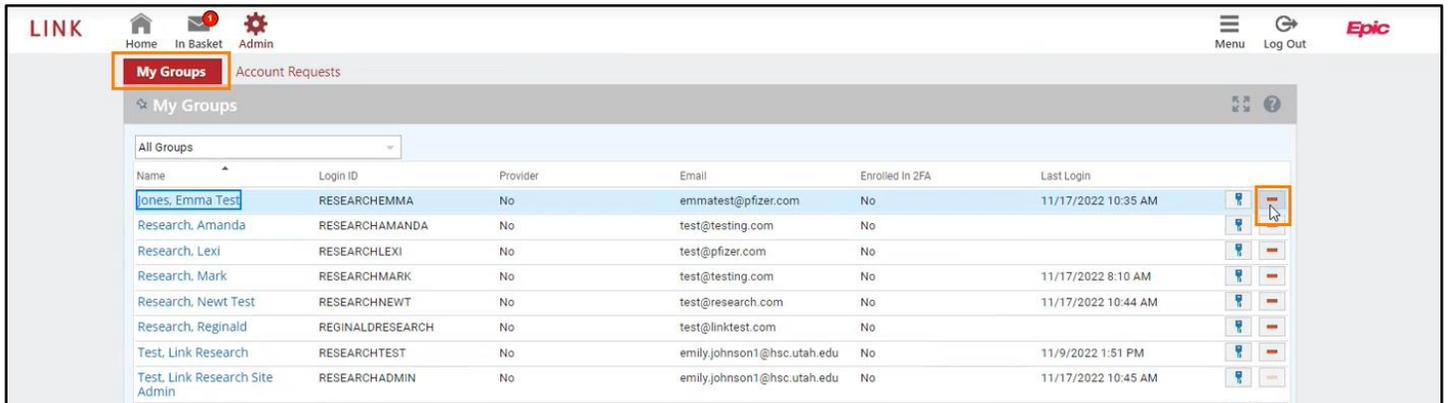
Name	Status	Date	Email	ID
Research, Mark	Record Generation Completed	11/17/22	test@testing.com	108942940
Research, Lexi	Record Generation Completed	11/17/22	test@pfizer.com	108942944
Research, Amanda	Record Generation Completed	11/17/22	test@testing.com	108942952
Jones, Emma Test	Record Generation Completed	11/17/22	emmatest@pfizer.com	435-658-9201 108942954
Research, Newt Test	Complete	11/17/22	test@utahdepofhealth.com	108942956
Scamander, Newt	Pending	11/16/22	test@testinglink.com	108942905
Research, Existing Thelma	Pending	11/16/22	testing@testing.com	108942918
Scamander, Newt	Record Generation Completed	11/16/22	test@testing.com	108942912

## Research Administrators – Removing a Study Monitor (Deactivate)

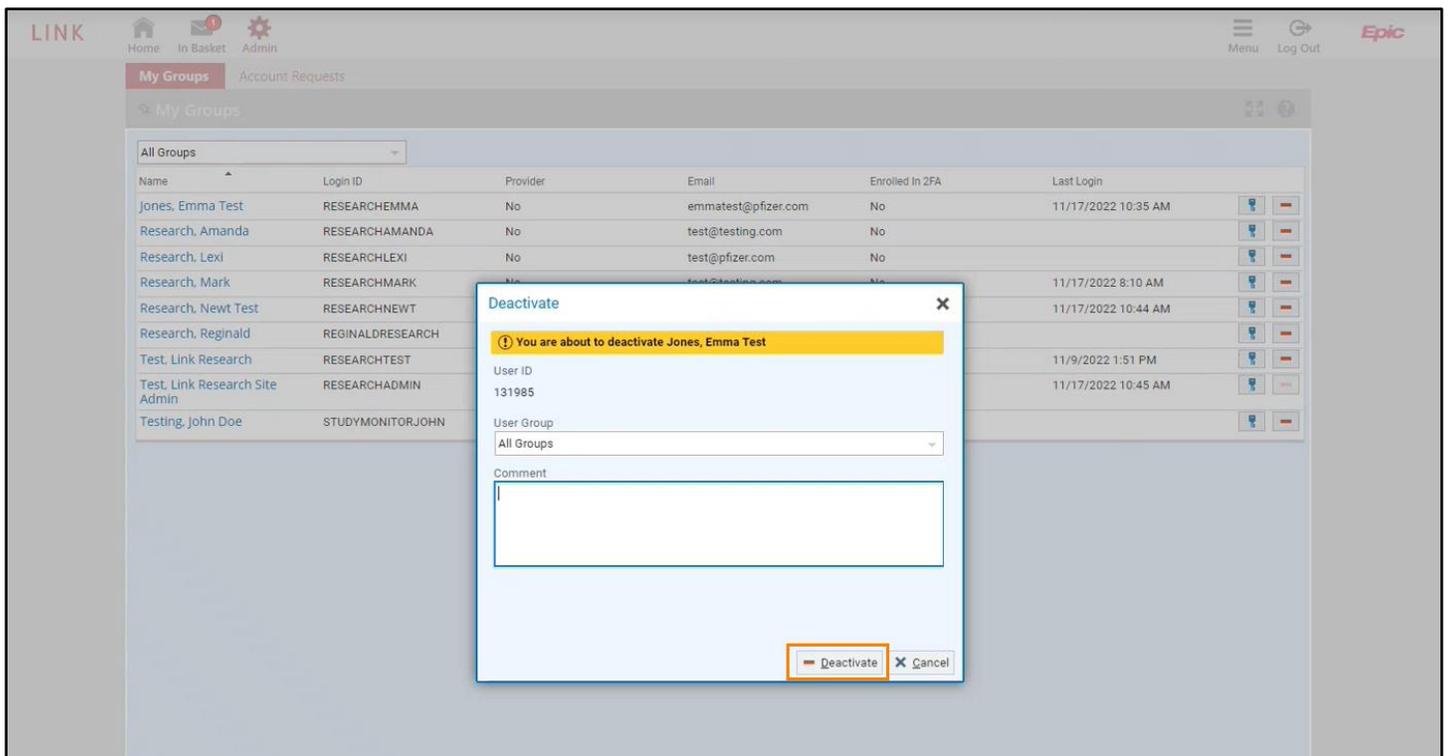
After the Release to Date (Max 5 Days) is reached the Study Monitor will automatically lose access to the patient. If the Study Monitor needs to be deactivated from Link you will do this from the My Groups activity in Link.

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

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



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



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