

Research Coordinator – Grant Access to a patient for a Study Monitor

PURPOSE: Research Administrators will request access for Study Monitors to view patient information using Epic Link. As a Research Coordinator, you will need to grant access to a patient’s record for the Study Monitor.

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.

Research Coordinator – Grant Access to a patient for a Study Monitor

1. From your Research Coordinator – My studies Dashboard, click **Research Reports**.

The screenshot shows the 'Research Coordinator - My Studies' dashboard. It is divided into three main sections: 'Study Accrual', 'Study Operations', and 'In Basket & Reporting'. The 'Study Accrual' section shows 'Actively Enrolled Patients' with a count of 2. The 'Study Operations' section includes 'Study Team Review', 'Bill Review', and 'Contraindicated Meds in the Last 30 Days'. The 'In Basket & Reporting' section contains an 'In Basket Glance' table and a 'Favorites and Subscribed Reports' list. In the 'Favorites and Subscribed Reports' list, the 'Research Reports' link is highlighted with a red box.

	New	Total
Open Charts	4	4
My Open Encounters	0	1
Results	1	1
Rx Request	0	5
Pt CRM Request	1	1
MyChart Administration	42	42
New Account Request	0	29
Patient Clinical Update	0	3
Patient Questionnaires	2	2
Pt Scheduling	0	3
Research Recruitment	1	2
Site Maintenance	1	4

Report Name	Finished At	Results	Status
Reporting Workbench Reports			
Find Patients on Research Study (Specify Study)	11/17 10:32 AM	16	Viewed
FSC Drug and Alcohol Use			Ready to run
Patients Needing Research Billing Review (Study Team)			Ready to run

2. Search for, and run the **Patient’s Associated with My Studies** report.

The screenshot shows the Epic Library search results for the query 'patients associated with my stud'. The search results are displayed in a list format. The report 'Find Patients Associated with Research Studies' is highlighted with a red box. Below the report title, there is a description: 'Returns all patient associations for studies where the billing status is ACTIVE and the user running the report is listed in the study record.' There are 'Run' and 'Edit' buttons next to the report title.

Note: You can click the star icon to favorite this report.

- From this report you can manually give access to the Study Monitors for these patients. Select the patient(s), verify that none of the selected patients have a status of “Withdrawn” in the Enrollment Status column, and click **Release to Study Monitor**.

If a patient has an enrollment process of “withdrawn” do NOT release to the study monitor. You will need to follow the manual non-LINK release process for the patient.

The screenshot shows a web application interface for managing study patients. At the top, there's a navigation bar with options like 'Research Studies', 'Chart', 'Encounter', 'Add to List', 'Communication', 'Questionnaire Series', 'Release to Study Monitor', 'Send Recruitment Request', 'Study Association', and 'Track PI Outreach'. Below this is a table of patients with columns for Patient, DOB, Sex, MRN, Has Mult?, Participant ID, Study Code, Study Name, Enrollment Status, Active Start Date, Active End Date, Last Linked Appt, Next Linked Appt, and Enrollment Status Effective Date. Two patients are listed: Wesley, Fred and Wesley, Percy, both with an enrollment status of 'On Treatment'. Below the table, there are sections for 'Demographics', 'Family Comments', 'Research Studies', and 'Problem List'. The 'Problem List' section shows a list of non-hospital issues such as 'Human immunodeficiency virus (HIV) disease (HCC)', 'Anxiety', and 'STD (sexually transmitted disease)'. A 'Mark as Reviewed' button is visible at the bottom of the problem list.

Note: If you want to select more than one patient at a time, you can use the keyboard shortcut Ctrl+ selecting the patient(s).

- You will need to complete the fields. Click the magnifying glass selection tool for available selections. Select the **Study, Patient Group (Study Monitor’s Name), Release From Date** and **Release to Date**.

This screenshot is similar to the previous one but shows a modal dialog box titled 'Release to Study Monitor' overlaid on the Percy Wesley patient row. The dialog box contains four input fields: 'Research Study' with a magnifying glass icon, 'Patient Group' with a magnifying glass icon, 'Release From Date', and 'Release To Date'. At the bottom of the dialog, there are two buttons: 'Release' (with a checkmark icon) and 'Cancel' (with an X icon). The background table and patient details are dimmed.

Note: The maximum release date for a patient to a Study Monitor is 5 days.

5. Click **Release**. The patient is now available to the Study Monitor.
6. In this report, you can see which Study Monitors a patient has been released to, and for which dates. Select the patient and in the Research Snapshot at the bottom of the screen scroll until you see the **Study Monitor Releases**.

Find Patients Associated with Research Studies [18781341] as of Thu 2/16/2023 3:41 PM

Research Studies | Chart | Encounter | Add to List | Communication | Questionnaire Series | Release to Study Monitor | Send Recruitment Request | Study Association | Track PI Outreach

Detail List | Explore

Filter

Re-run Report | Refresh Selected | Select All

Patient	DOB	Sex	MRN	Has Mult?	Participant ID	Study Code	Study Name	Enrollment Status	Enrollment Status Effective Date	Active Start Date	Active End Date	Last Linked Appt	Next Linked Appt
						92223	A pilot study to develop contrast-enhanced ultrasou...	Off Study	04/13/2022	08/14/2018	09/19/2018		
						92223	A pilot study to develop contrast-enhanced ultrasou...	Off Study	12/28/2022	09/26/2019	10/13/2022		
						126350	Ph III Study of Nivo + AVD or Adcetris + AVD in Ne...	On Follow Up	04/15/2022	06/30/2020		01/05/2023	
						92223	A pilot study to develop contrast-enhanced ultrasou...	Off Study	04/13/2022	05/13/2019	05/14/2019		
						126350	Ph III Study of Nivo + AVD or Adcetris + AVD in Ne...	On Follow Up	04/15/2022	07/17/2020		07/20/2022	
						126350	Ph III Study of Nivo + AVD or Adcetris + AVD in Ne...	On Follow Up	10/24/2022	03/24/2022		09/15/2022	
						92223	A pilot study to develop contrast-enhanced ultrasou...	Off Study	04/13/2022	10/05/2018	10/23/2018		

Research Snapshot

Ph III Study of Nivo + AVD or Adcetris + AVD in Newly Diagnosed Adv CHL On Follow Up 126350

Study Monitor Releases

Research Study	Patient Group	Release From	Release To	Details
Ph III Study of Nivo + AVD or Adcetris + AVD in Newly Diagnosed Adv CHL	Natalie Test	02/15/2023	02/18/2023	Details
		02/20/2023	02/22/2023	Details

My Last Relevant Note

There are no notes for this patient that meet the current filters.

LORazepam (ATIVAN) 0.5 mg tablet
 Benralizumab (FASENRA PEN) 30 MG/ML solution auto-injector
 fluticasone-salmeterol (ADVAIR HFA) 230-21 MCG/ACT inhaler
 busPIrone (BUSPAR) 10 mg tablet
 albuterol (PROVENTIL) (2.5 MG/3ML) 0.083% nebulizer solution
 albuterol (VENTOLIN HFA) 108 (90 Base) MCG/ACT inhaler
 montelukast (SINGULAIR) 10 MG tablet
 sildenafil citrate (VIAGRA) 100 mg tablet
 celecoxib (CELEBREX) 200 mg capsule
 cetirizine (ZYRTEC) 10 mg tablet
 Spacer/Aero-Holding Chambers (OPTICHAMBER DIAMOND) miscellaneous
 omeprazole (PRILOSEC) 20 mg delayed release capsule
 acetaminophen (TYLENOL) 325 mg tablet