

Epic Research End User Training

November 2022

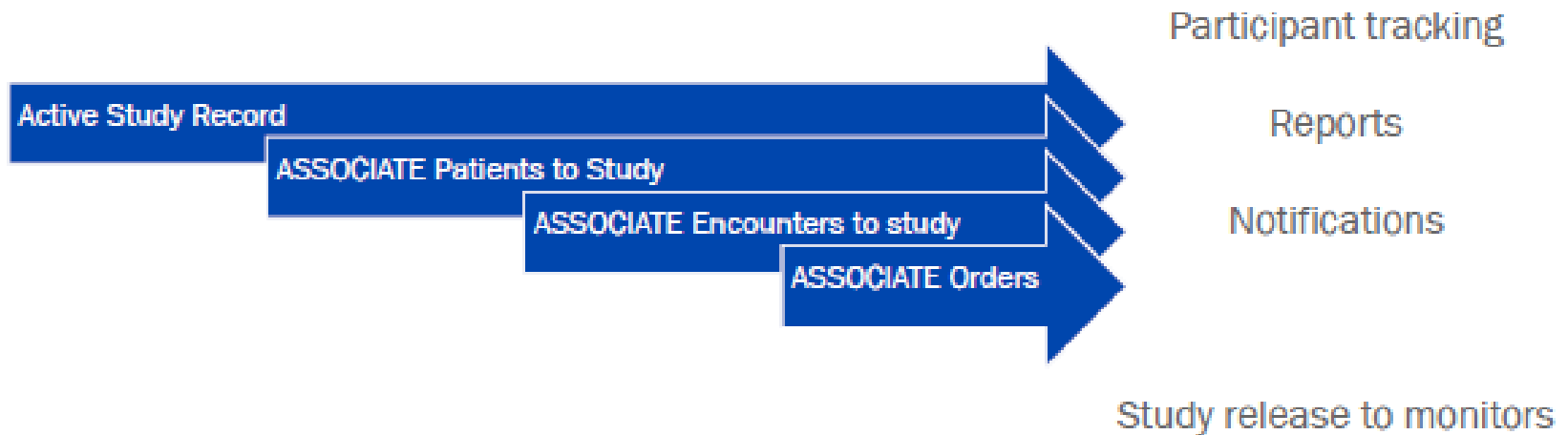
Agenda

- Research in Epic: Overview
- Study Initiation: Updating & Activating a Study Record
- Pre-screening & Patient Recruitment: Associating Patients to Studies
- Conducting Research: Registration and Scheduling
- Conducting Research: Associating Encounters to Studies
- Conducting Research: Associating Orders to Studies
- Conducting Research: Research Documentation
- Closing a Study
- Reporting Workbench
- SmartPhrases
- Preference Lists

Research Epic Overview



Study Association Benefits



Research Roles in Epic

- Principal Investigator (PI): clinical or non-clinical (PhD)
- Research Staff:
 - Research Assistant/Coordinator/Manager
 - Clinical Research Nurse Coordinator/Specialist
 - Student (Medical, Post Graduate Trainee)
 - Fellow

Study Initiation – Research Studies in Epic

- Study information imported into Epic from eREB includes:
- Study name
- REB # (also imported as Study Code)
- Study description
- Study Type
- Additional Information



Study Record – Forms to Update

- Users and Providers > Principal Investigator, Study Coordinators
- Automated actions > ADT Notification, Appointment notifications
- General Information > Study Status - Active

Study Statuses

Inactive

Active

Complete

Try It yourself

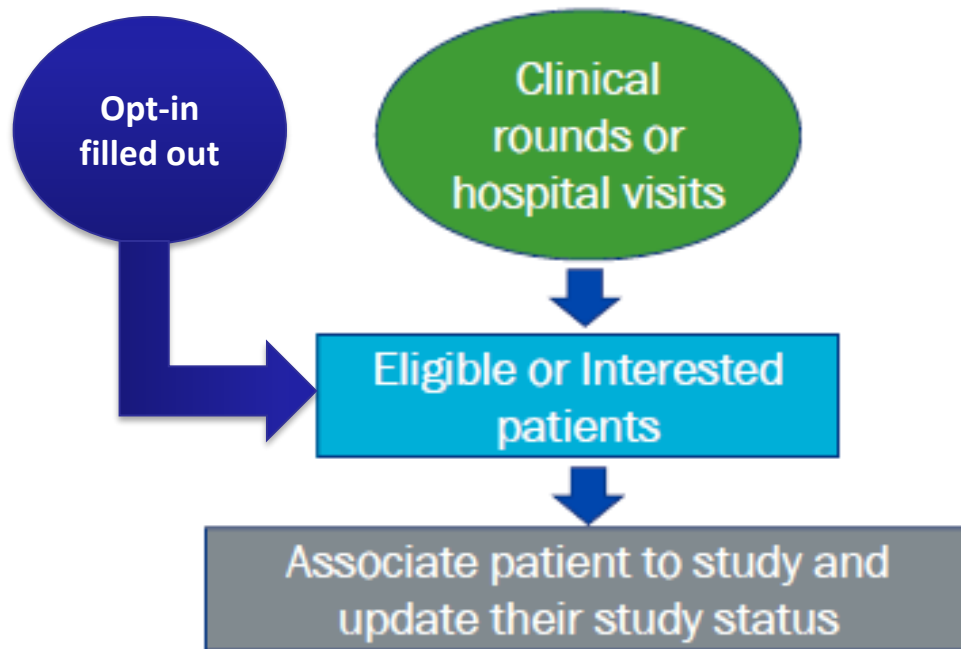
- Activity 1: Update and Activate a study record
- Activity 2: Updating study record



Key Takeaways

- When a study status becomes active, patients can be associated to the study
- Study team members listed in study record
- Never mark study status as Complete, this cannot be un-done. Study Completion will be done by the Epic Analysts team

Pre-screening and Patient Recruitment



Study Statuses

Inactive

Identified

Interested

Eligible

Declined

Waiting for Consent

Active

Enrolled

Consented in
Screening

Complete

Completed

Disqualified

Withdrawn

Try it Yourself

- Activity 3: Prescreen and Recruit - Associating a patient with a study
- Activity 4: Updating a Patient's Study Association
- Activity 5: Documenting that a Patient Is Not Interested in a Study

Active Start Dates & Study Coordinators Fields

- Active Start Date
 - This is a billing start date, not a clinical status date
 - Should only be used when retrospectively updating a patient's status either 'Consented – In Screening' or 'Enrolled'
 - Should only be set once
- Study Coordinators
 - Optional field, if study staff are splitting responsibility for participant recruitment
- Participant ID = DO NOT USE

Key Takeaways

- All patients contacted about a study are associated to the study, even if they decline
- All associations remain documented in the system, even deleted associations
- Be mindful of privacy, confidentiality and REB approval when reviewing chart data for study eligibility & enrolment

Conducting Research

Scheduling Research-Related Visits

Types of research-related visits:

- Clinical visit for Research purposes with PI
 - Requires consultation & approval from clinical coordinator
 - Scheduled by Front Desk staff*
- Research Coordinator-only visit with research staff
 - Research Client visit for study purposes

Research Visits

- Information needed to schedule an appointment
 - Patient name
 - Department
 - Visit type
 - Provider
 - Date/time

Try it Yourself

- Activity 6: Scheduling an Appointment with a Provider (the Clinical PI)

Key Takeaways

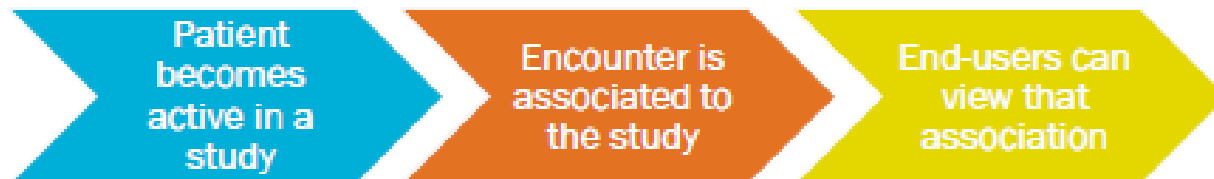
- Make sure you select the appropriate department, visit type and provider when scheduling a research-related visit
- Always check with the clinical coordinator before scheduling in a provider PIs calendar
- 'Research clients' should be registered before their appointment using minimal information

Time and Date Shortcuts

Shortcut	Meaning
T	Today
T+1	Tomorrow
T-1	Yesterday
T-3	3 days ago
W+1	One week from today
M-1	One month ago
Y+1	One year from today
N	Now
N+30	Thirty minutes from now

Associating Encounter with a Study

- Patient encounters that are partially or fully-study related must be associated to your study
- This process is called associating encounters to a study
- Encounters to associate may include:
 - ‘Clinical’ visits that have study-related items
 - Research Coordinator Only visits
 - Inpatient admissions with study-related items



Associating Encounters

- Research staff can associate encounters in the following ways:
 - During Registration and Scheduling
 - Research staff have access to Appt Desk as well!
 - Using a Reporting Workbench report
 - Within the encounter itself

Try it Yourself

- Activity 7: Associating Encounters (Appointments) with Studies – using a Report

Key Takeaways

- Link the encounter to the study as early as possible
 - Can link when scheduling appointment
- Only patients who are active in the study can have their appointments linked to that study

Research Orders – Pending Orders

- Once an encounter (visit, admission) is linked to a study, you can pend and associate research orders
 - Lab work, imaging, medications or other hospital tests
 - Study PI will need to sign
- Orders may be pended in an Orders Only encounter in certain situations

Big Picture

Patient becomes active in a study

Encounter is associated to the study



Orders are queued up and associated to the study

End-users can view that association

Pending Orders Workflow



Try it Yourself

- Activity 8: Pending/Linking Research Orders – Research Blood Collection Only

Additional Epic Functionality

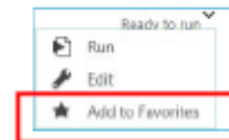
- SmartPhrases
 - For study order Comments, Notes
- Preference Lists
 - Place study orders quickly

Key Takeaways

- Link the order to the study before the order is signed
- Only patients who are active in the study can have their orders linked to that study

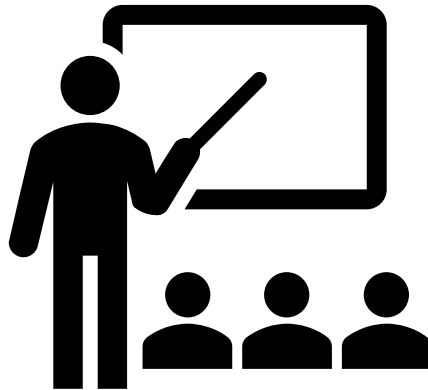
Reporting Workbench Reports

- Access from:
 - Research Dashboard > Research Reports
 - My Reports > Library
- Highly customizable/editable
 - Edit report criteria, data columns, appearance
- Save private copy of edited reports, add to 'Favorites'



Reporting Workbench Reports

- Follow your instructor



Key Takeaways

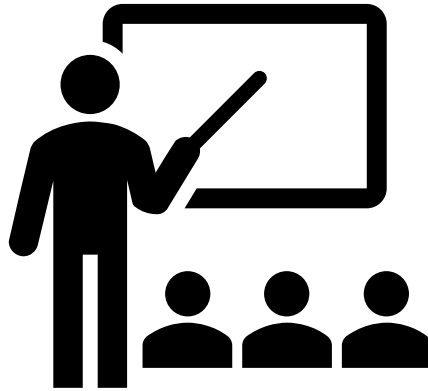
- Edit reports to customize per your requirements
- Save private copies that you can share with study colleagues
- Add reports to 'Favorites' and organize
- Only Clinical PIs can export report data to file

SmartPhrases

- ‘Dot phrase’ text-expansion shortcuts
- Create SmartPhrases for:
 - ‘Research Instructions’ Comments when entering orders
 - Enrolment Comments when associating patients to study (per REB approval)
 - Research Notes (per REB approval)
- SmartPhrases features
 - SmartPhrases are shareable
 - Use *** ‘wildcards’ as placeholders
 - Use SmartLinks to pull info from patient’s chart

SmartPhrases

- Follow your instructor



SmartPhrases – Key Takeaways

- Create and share custom SmartPhrases for your studies
- Use them for Research Instructions order comments, Enrolment
- Comments, and Research Notes (when appropriate)
- Combine with SmartLinks to pull chart data, and wildcards to cue required text

Preference Lists

- Save orders with study-specific details to your Preference List
 - Including Research Instructions order Comments!
- Help you place study orders more efficiently
 - Pick orders off a list when pending study orders
- Preference Lists are shareable
- Save filled-out study orders to your Preference List
- Organize Preference List by study, order type, study phase, etc.
- Other users can copy your Preference List