

Releasing Patient Groups to External Study Monitors

Effective October 23, 2024, research study coordinators will now be responsible for releasing patient groups in Epic to external study monitors. In Epic, a patient group is a list of patients that can be associated with multiple users within the organization and when a user is associated with a patient group, the user can access the record of each patient in that group.

Try It Out

1. The research study coordinator will log into Epic Hyperspace to **Release the Patient List** from the **Actively Enrolled Patients** Dashboard report within the **Research Coordinator-My Studies Dashboard**.

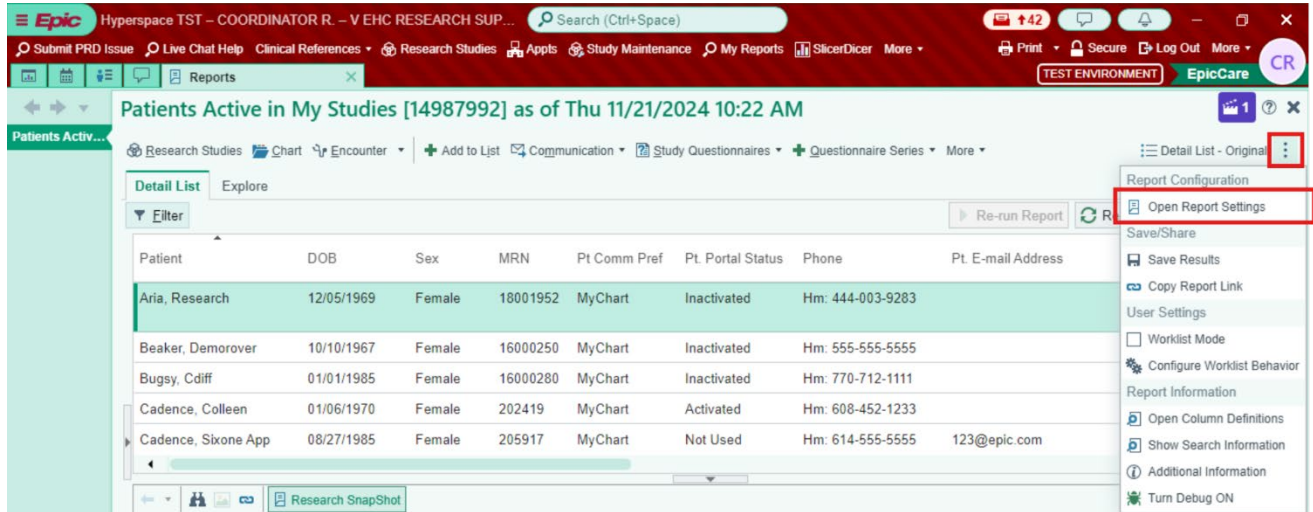
Note: If the **Research Coordinator-My Studies Dashboard** is not your default dashboard, remember that you can select a different dashboard by clicking the down divot (arrow) that appears after the dashboard name and enter the name of the dashboard in the search field.

The screenshot shows the Epic Research Coordinator - My Studies Dashboard. The dashboard is divided into three main sections: Study Accrual, Study Operations, and In Basket, Links & Reports. The 'Actively Enrolled Patients' report is highlighted with a red box. Below it, the 'All Patient-Study Associations' report is visible. The 'Study Operations' section shows a table of 'Study Monitor Releases for My Studies' with columns for Research Study, Upcoming Releases, and View Releases. The 'In Basket, Links & Reports' section shows a table of 'In Basket Glance' with columns for Results, New, and Total.

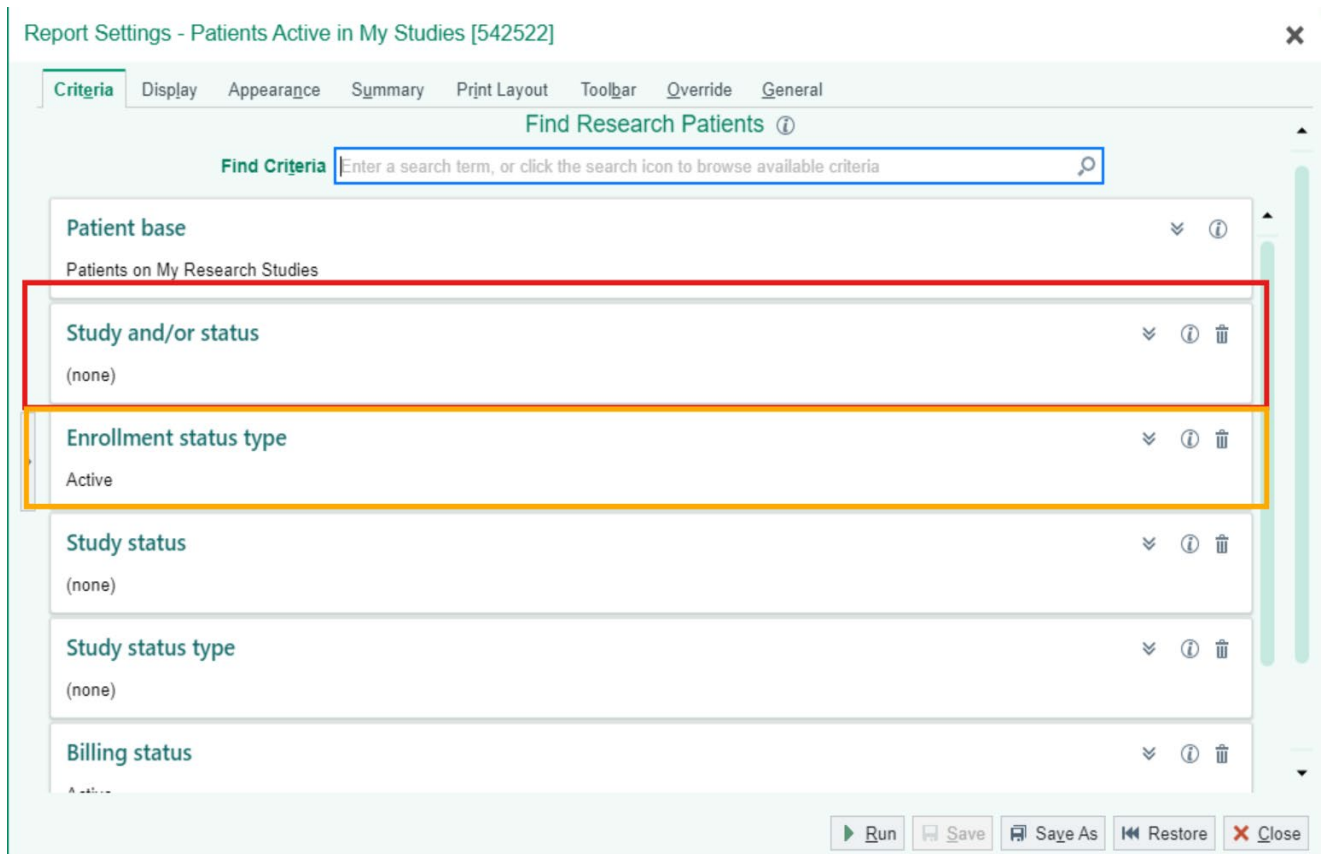
Research Study	Upcoming Releases	View Releases
(RSH 82) INTTESTFINAL 82 RESEARCH STUDY ASTHMA	0	View Releases
Int Testing Rnd1 FS RESEARCH STUDY-INSOMNIA	0	View Releases
INTTEST1 82 RESEARCH STUDY ASTHMA	0	View Releases
INTTESTTWO 82 RESEARCH STUDY ASTHMA	0	View Releases

Results	New	Total
Staff Message	0	1
My Open Charts	2	4
My Open Encounters	4	4
My Incomplete Notes	1	1
Adverse Event Review	0	2
Appointment Notification	9	19
Failed Fax	3	4
My Unsigned Orders	9	9
Post Mortem	0	1
Recurring Plans	10	15
Research ADT Event Notification	1	1
Research Recruitment	0	5

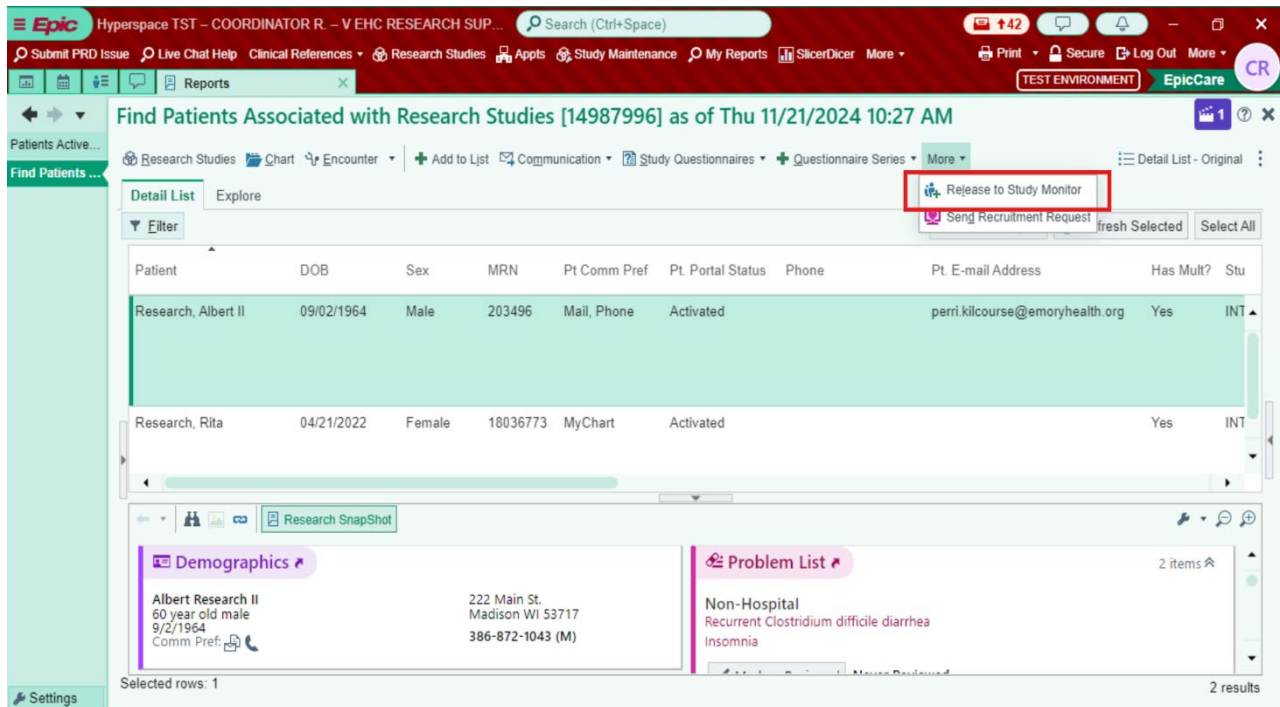
- After running the report from the dashboard, you can access the report settings to narrow or filter your results.



- In report settings, you should define your Study and/or change the Enrollment Status Type to include "active and inactive" to find all patients.

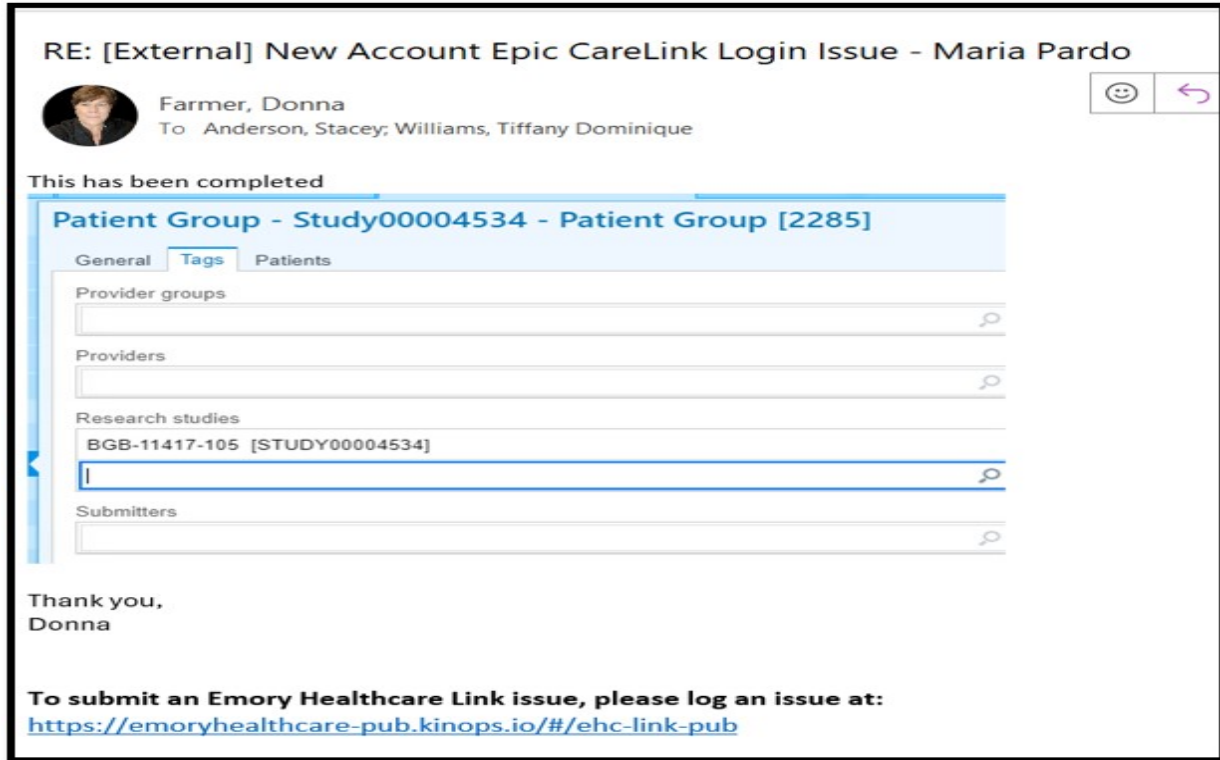


- Once you have filtered report results, you will highlight the patient row and find the **Release to Study Monitor** option.



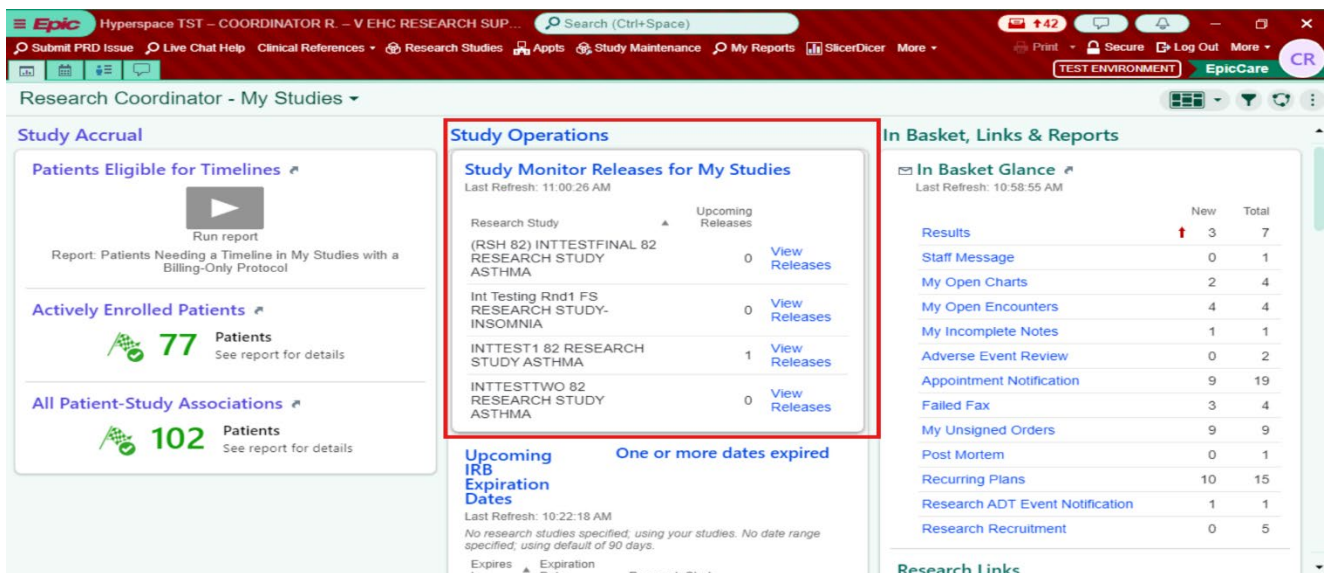
- When the **Release to Study Monitor** window opens, define your study by entering your research study code or study name in the **Research Study** field and enter the **Release From** and **Release To Dates**. Confirm the **Patient Group** information by referring to the email sent to you by the EpicCare Link team. Click **Release**.

The screenshot shows the "Release to Study Monitor" dialog box. It contains four input fields: "Research Study", "Patient Group", "Release From Date", and "Release To Date". Each field has a red exclamation mark icon indicating a required or error state. At the bottom right, there are "Release" and "Cancel" buttons.

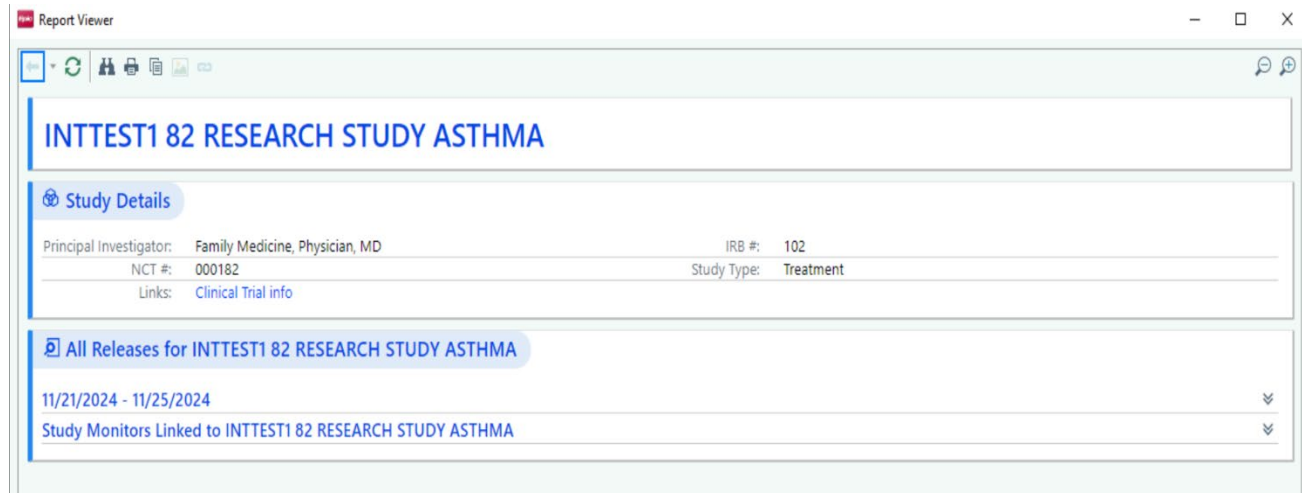


The study monitor will have view-only access to the records you release via EpicCare Link.

- Use the Study Operations section of your Research Coordinator – My Studies dashboard to View **Study Monitor Releases** for your studies.



When you click on **View Releases**, you can review the associated study and patient group releases. This is a readily available tool for you to use in troubleshooting a study monitor's potential issue with not being able to see the patient group or list. You can quickly verify the release date range, research study and patient group from your dashboard view.



You Can Also...

- For more information, or to review the end-to-end research study monitor workflow, visit the Study Monitors section of the [OnCore SharePoint site](#) and the Epic F1 Research and EpicCare Link Learning Home Dashboards.
- Review how to request a new account for a study monitor [tip sheet](#).
- Review how to Log-In for Research [tip sheet](#).
- Review [Emory Healthcare Link FAQs](#)
- To submit an Emory Healthcare Link issue, please log an issue at: <https://emoryhealthcare-pub.kinops.io/#/ehc-link-pub>