MyChart Message for Recruitment to Clinical Trials Using Reporting Workbench Query

**Study Team**
- Identify study needing recruitment
- Review inclusion/exclusion criteria with OCTRI CRI analyst
- Finalize MyChart Message text in Word
- Build REDCap survey (as needed)
- Submit IRB modification
- Send MyChart Message from PI or Study Coordinator
- Track recruitment data

**OCTRI Navigator**
- Complete intake in Magellan
- Route to BMIP
- Include information related to REDCap

**OCTRI BMIP**
- Perform Counts Check
- Discuss Counts outcome with Study Team
- RWB or RDW?
- See MyChart Message RDW Flow
- Assist with building REDCap survey (as needed)
- Confirm IRB documents contain REDCap survey as needed
- Communicate Approval to Epic Analyst

**CRI**
- Sends Request for Approvals: Governance Committee, PCPs & Div Chiefs, as appropriate
- Perform Counts Check
- Discuss Counts outcome with Study Team
- RWB or RDW?
- See MyChart Message RDW Flow
- Assist with building REDCap survey (as needed)
- Confirm IRB Approval (including MyChart for Recruitment) and Release REDCap survey (as needed)
- Communicate Approval to Epic Analyst

**Epic Research Analysts**
- Builds Workbench Query
- Wait for IRB approval and all other approvals from CRI
- Notify Epic Help desk, PEP, CCRIO, CHIO
- Identify who will assist with sending MyChart Message
- Track MyChart read data