Communicating Research Instructions to Clinical Personnel in Epic

Currently, there are a variety of mechanisms to communicate research specific information to clinical personnel in OHSU’s Electronic Health Record (EHR). However, each mechanism varies regarding its flexibility, who can see it and where, and who can create it. Therefore, depending on the information the needs to be conveyed and in what setting, the appropriate mechanism for conveying the information needs to be selected. This is a summary of the available mechanisms for communicating research specific information to clinical personnel and each mechanism’s appropriate uses, benefits, limitations, and instructions for utilization.

**Inpatient Provider Sticky Notes**
- **Description:** Inpatient Provider Sticky Notes is a standard function available in EpicCare which can be used to communicate information, including research information, to clinical providers regarding patients admitted to OHSU.
- **Mandatory?:** No. Sticky notes are an available means of communication within Epic and should be utilized when this mechanism is suitable to provide necessary communication to clinical personnel.
- **Benefits:**
  - Can target specific types of providers (physician sticky notes or nursing sticky notes)
  - Providers are very used to seeing sticky notes, they are very visible
  - Fully customizable text
  - Do not need to be discontinued (are automatically discontinued upon discharge)
- **Limitations:**
  - Only available for inpatients
  - Patients must have already been admitted to utilize sticky notes
  - Functionality only available to those with inpatient documentation security classes
  - Should not be used to document clinical information, as sticky notes disappear from the record upon patient discharge

**Training:** Information regarding Inpatient Sticky Notes is available [here](#).

**Inpatient Research Nursing Communication Order**
- **Description:** Research Nursing Communication Orders can be used to communicate and document research related clinical information to inpatient nursing staff.
- **Mandatory?:** Yes, for studies using bedside nursing resources a completed study specific Clinical Research Nursing Summary Form must be included in an inpatient research communication order for all subject enrolled in the study (see Inpatient Nursing Clinical Research Study Requirements and OHSU’s policy, [Research Documentation in the Integrated Health Record](#)). This communication mechanism can also be used for purposes...
other than providing the study Clinical Research Nursing Summary Form and is the preferred way of communicating pertinent clinical information and instructions regarding a research study that should become part of the patient’s medical record and/or may need to be referred to at a later time.

- **Benefits:**
  - Very visible to nurses on Kardex report
  - Fully customizable text
  - Do not need to be discontinued
  - Appropriate mechanism for communicating important clinical information to nursing staff that should be documented in the patient’s record
  - Available to all staff with inpatient order entry access or research access

- **Limitations:**
  - Only available for inpatients
  - Patients must have already been admitted to utilize

**Training:** Information regarding the Research Nursing Summary is available [here](#). Information regarding how to place an inpatient research nursing communication order is available [here](#).

**My Chart Messages**

- **Description:** If a research subject has access to My Chart, the provides a secure way to communicate with research subjects in addition to email.

- **Mandatory?** No.

- **Benefits:**
  - Secure method of communication
  - The communication is documented in the patient’s Epic record

- **Training:** Information regarding My Chart messages is available [here](#).

**Research Documentation Smartphrases**

- **Description:** Universal smartphrases are available in Epic to assist in documenting the research consent process, subject study completion, and premature withdrawal of a study subject. These smartphrases can be tailored and saved to support documentation for individual studies.

- **Mandatory?** Use of the smartphrase is not required, but appropriate documentation of subject consent and discontinuation from studies is STRONGLY encouraged.

- **Benefits:**
Viewable throughout the OHSU Health System (all EpicCare users, inpatient and outpatient, schedulers, registration, admitting, coders, billers, etc.)
- Functionality to document available to all security classes with documentation access
- This, and all other research related documentation, can be bookmarked for easy future reference

**Training:** Information regarding Research Documentation Smartphrases in Epic is available [here](#).

### Research Indicator

**Description:** The Research Indicator in the patient header identifies in the EHR whether a patient is enrolled in a research study involving OHSU clinical services. The Research Indicator will either state the patient is “Active” or “Inactive” in a research trial at that time, or will not be visible at all if the patient has never been on a clinical trial with clinical services. To obtain more study specific information click on the Research Indicator (or the Research Studies tab in the Clinical Navigator if the Research Indicator has been viewed at least once). The Research Studies page will contain the following information:
- Enrollment Date
- Principal Investigator
- Study Name
- Primary Contact Name
- Primary Contact Number
- Industrial Account #
- IRB#

The Research Indicator alerts clinical staff, schedulers, admissions staff, coders, and billing staff to the fact the patient is enrolled in a clinical trial and provides them with the information necessary to support clinical, operational, and billing activities, as well as appropriate clinical care and management of the patient.

**Mandatory?** Yes. Per OHSU’s policy, [Research Documentation in the Integrated Health Record](#), all patients receiving clinical services in the context of a research study are required to have a Research Indicator on their electronic medical record in Epic within 3 business days of a patient being consented. “Clinical services” are defined as any procedure, test, or exam performed by an OHSU licensed practitioner including but not limited to blood draws, imaging procedures, clinical lab tests, non-invasive examinations, and dental work in the context of a research study, INCLUDING studies comprised completely of standard clinical care.

**Benefits:**
- Viewable throughout the OHSU Health System (all EpicCare users, inpatient and outpatient, schedulers, registration, admitting, coders, billers, etc.)
- An active alert that indicates research participation -- additional study-specific information can be obtained by clicking on the indicator
- Functionality available to all security classes
Consistent quality controlled content

- Limitations:
  - Specific uses, not for communicating study specific instructions
  - Must email the CRBO the Research Study Subject Change Form in order to have status in Epic updated

- Training: Information regarding the Research Indicator in Epic is available [here](#) and instructions for creating and deactivating Research Indicators is [here](#). For questions regarding Research associations in Epic, contact the Clinical Research Billing Compliance Office at crbo@ohsu.edu

**Research Protocol Patient Problem**

- **Description:** The Research Protocol Patient Problem allows research personnel to communicate patient specific study related clinical instructions to clinical personnel caring for the patient by adding a research specific problem to the patient’s problem list which triggers a research specific Best Practice Alert (BPA). This communication mechanism is best used to communicate information to clinical personnel that is required throughout multiple patient encounters.

- **Mandatory?:** No. Research Protocol Patient Problem list entries are an available means of communication within Epic and should be utilized when this mechanism is suitable to provide necessary communication to clinical personnel.

- **Benefits:**
  - Viewable to all clinical personnel in both inpatient and outpatient environments
  - Persistent across encounters until discontinued
  - Functionality to create Research Protocol Patient Problems is available to all security classes that include documentation access
  - Fully customizable text

- **Limitations:**
  - A passive alert, must click on the Research Patient Problem in problem list to read instructions
  - Must be resolved when instructions are no longer applicable

- **Training:** Information regarding the Research BPA is available [here](#).

**Specialty Comments**

- **Description:** Specialty Comments can be used to communicate research instructions to clinical providers in the ambulatory setting.

- **Mandatory?:** No.
• **Benefits:**
  - Visible to all ambulatory providers
  - Appears on the patient snapshot, so visible to providers not looking at the problem list
  - Fully customizable text
  - Persistent across encounters

• **Limitations:**
  - Not visible to inpatient nurses
  - Requires ambulatory documentation or inpatient provider access

**Training:** Information regarding the Specialty Comments is not currently available.

**Stork Sticky Notes**

• **Description:** Stork Sticky Notes is a function available in EpicCare in obstetric departments which can be used to communicate information, including research information, to clinical providers regarding pregnant patients at OHSU.

• **Mandatory?**: No. Sticky notes are an available means of communication within Epic and should be utilized when this mechanism is suitable to provide necessary communication to clinical personnel.

• **Benefits:**
  - Available in all settings
  - Persists across encounters for the during of the patient’s pregnancy
  - Very visible
  - Fully customizable text
  - Do not need to be discontinued (are automatically discontinued upon end of patient’s pregnancy)

• **Limitations:**
  - Only available for pregnant patients
  - Can only be viewed in obstetric departments
  - Functionality only available to those with obstetric documentation security classes
  - Should not be used to document clinical information, as sticky notes disappear from the record upon the end of the patient’s pregnancy

• **Training:** Information regarding Stork Sticky Notes is available [here](#).