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MyChart Recruitment

Adam Lee
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Research Health Informatics with Epic@UNC

What is MyChart?

MyChart is Epic's customizable patient portal where patients can access their health records and complete tasks essential to managing their care.

Patients can access MyChart through the web and mobile apps for iOS and Android devices, making many aspects of managing healthcare as convenient as managing an email account.

Epic MyChart is branded as *My*UNC*Chart* at UNC Health

myUNCChart™ Capabilities (just a few)

- **Inbox.** Send and receive messages, letters, and questionnaires.
- **Get Medical Advice.** Send providers photos and messages with non-urgent questions to see if a visit is needed.
- **Ask Customer Service.** Send non-medical messages to customer service staff.
- **Referrals.** Request a referral to a specialist.
- **Clinic Calls.** Review details of care advice calls and customer service calls.
- **E-Visits.** Submit questionnaires, photos, videos, and symptoms as an e-visit for physicians to review and follow up on.
- **Notifications.** Opt to receive emails, text messages, or mobile push notifications when new information is available in their accounts.
- **Research Studies.** See eligibility for research participation and receive recruitment requests from your organization.

myUNCChart™ Recruitment Services

myUNCChart™ Foundation

Use MyChart to find out whether potentially eligible patients are interested in participating in a study. When a patient is identified, details about the study appear in MyChart along with other studies the patient is or has been involved in. The patient indicates whether she's interested in participating, and an In Basket message is sent to users at your organization. These actions are tracked and reportable.

- The study team selects and send the interest message using Epic.

myUNCChart™ Message

Use MyChart to inform potentially eligible patients in bulk about participating in a study. When a patient is identified, details about the study are sent to MyChart as a Inbox message. Links may be included for patients to follow, but no other action is available. Reporting metrics are available from custom report created by NC TraCS.

- A NC TraCS analyst sends the bulk messages.

myUNCChart™ Integrate

Building off the *Message* functionality, links to REDCap are included in the MyChart message. REDCap is used to capture and record study interest. This option allows more complete cohort management and linkages between external study identifiers, the patient's medical record, and third-party study websites.

- A NC TraCS analyst sends the bulk messages.

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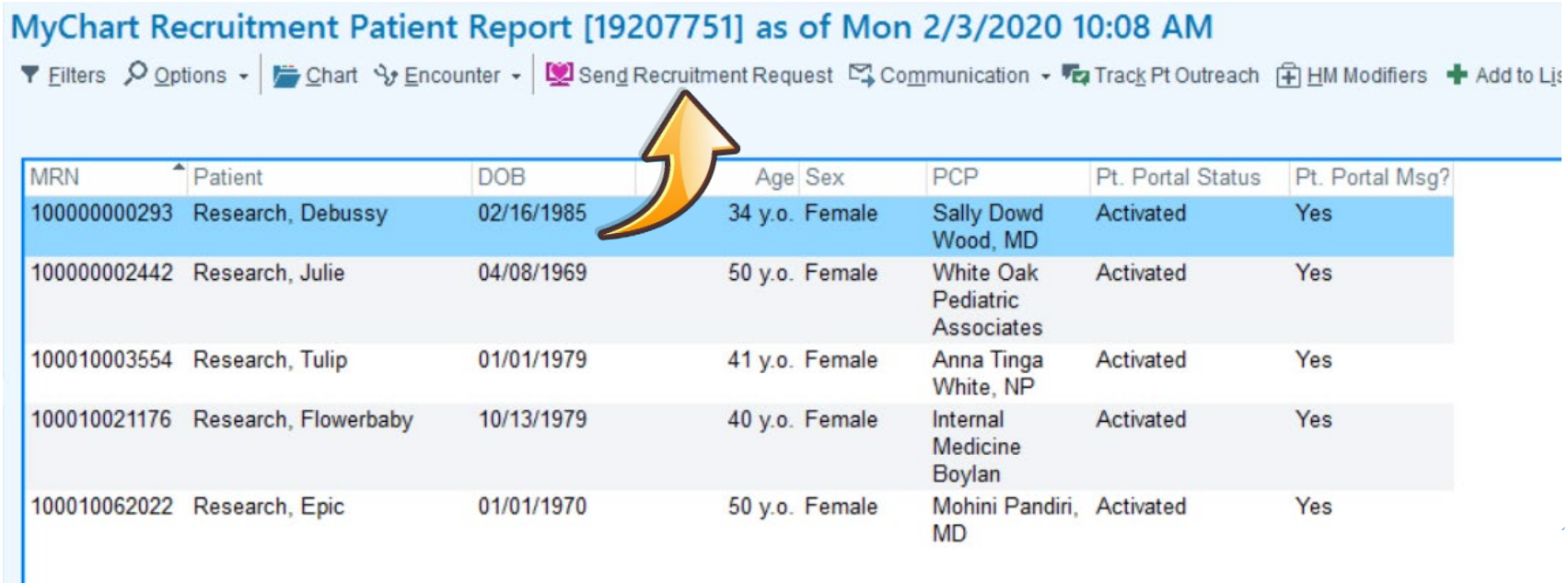
Sending MyChart Research Recruitment Messages

- Once the study and patient facing message have been approved to use MyChart Research Recruitment Messages, the list of patients from CDWH will be added into a Reporting Workbench Report in Epic.
- The Research Coordinator will run the report. They will select one name on the report and click Send Recruitment Request



MRN	Patient	DOB	Age	Sex	PCP	Pt. Portal Status	Pt. Portal Msg?
100000000293	Research, Debussy	02/16/1985	34 y.o.	Female	Sally Dowd Wood, MD	Activated	Yes
100000002442	Research, Julie	04/08/1969	50 y.o.	Female	White Oak Pediatric Associates	Activated	Yes
100010003554	Research, Tulip	01/01/1979	41 y.o.	Female	Anna Tinga White, NP	Activated	Yes
100010021176	Research, Flowerbaby	10/13/1979	40 y.o.	Female	Internal Medicine Boylan	Activated	Yes
100010062022	Research, Epic	01/01/1970	50 y.o.	Female	Mohini Pandiri, MD	Activated	Yes

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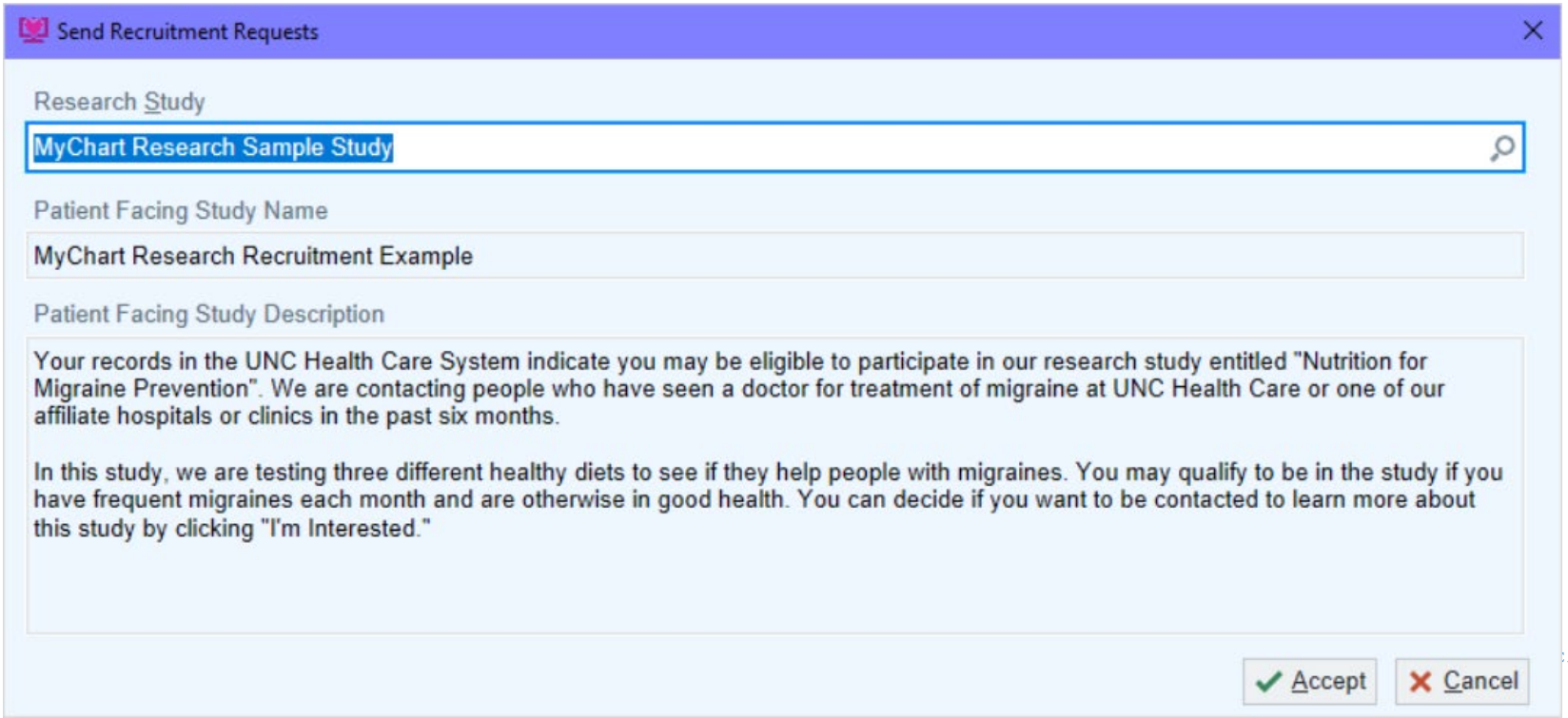
Sending MyChart Research Recruitment Messages

- The coordinator will get a pop-up where they will select the study. The pop-up will include the Patient-facing study name and Patient-facing description for the coordinator to double check.



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The patient receives a email 'tickler'

- This is optional as configured by the patient's MyChart Communication preferences.

Dear Rose Research:

You may be eligible for participation in a research study based on information in your medical record. By taking part in a research study, you may help to improve health care for future patients.

Sign in to https://myuncchart.org and go to the Health tab. Select the Research Studies menu item to see your personal invitation and learn more about the study. You can get more information about the study and decide whether or not to participate. Often people who join research studies feel better about their care.

Thank you for your consideration!

Sincerely,

UNC Health Care

myUNCChart™ Foundation

You might be a good fit for a research study.

View Study

Research Studies

Available Studies

Based on your medical record, you have been identified as potentially eligible for these studies. Click "I'm Interested" to notify the research team that you may want to participate in the study.

MyChart Research Recruitment Example

Principal Investigator

Ian B Buchanan

Study Coordinators

Ed Finerty
Stephanie J. Mascaro
Loretta Fearrington
Emily Pfaff
Tyrone Wade

Description

Your records in the UNC Health Care System indicate you may be eligible to participate in our research study entitled "Nutrition for Migraine Prevention". We are contacting people who have seen a doctor for treatment of migraine at UNC Health Care or one of our affiliate hospitals or clinics in the past six months.

In this study, we are testing three different healthy diets to see if they help people with migraines. You may qualify to be in the study if you have frequent migraines each month and are otherwise in good health. You can decide if you want to be contacted to learn more about this study by clicking "I'm Interested."

Test link
 click me

Links

More Info on Clinical Trials

I'm interested | No, thank you

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- If a patient takes action (either interested or declines), then the study team receives notification

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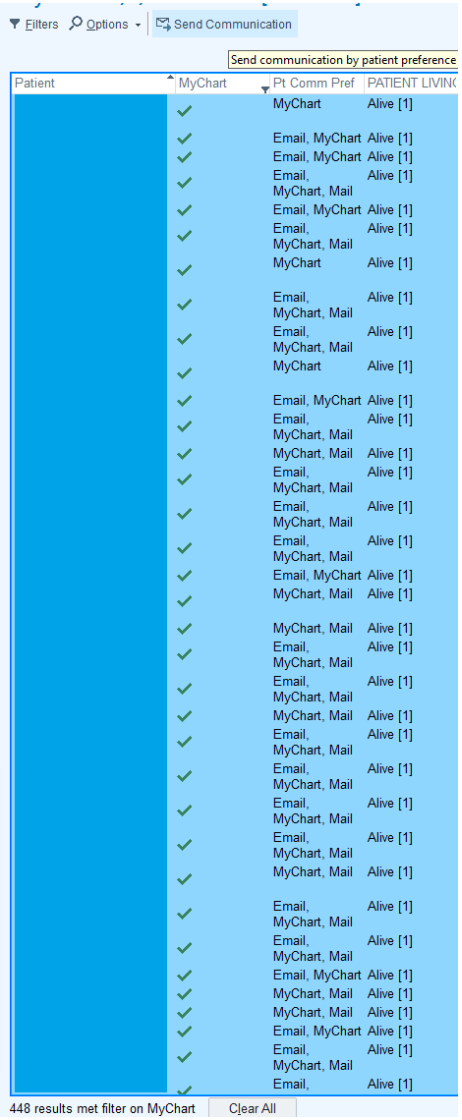
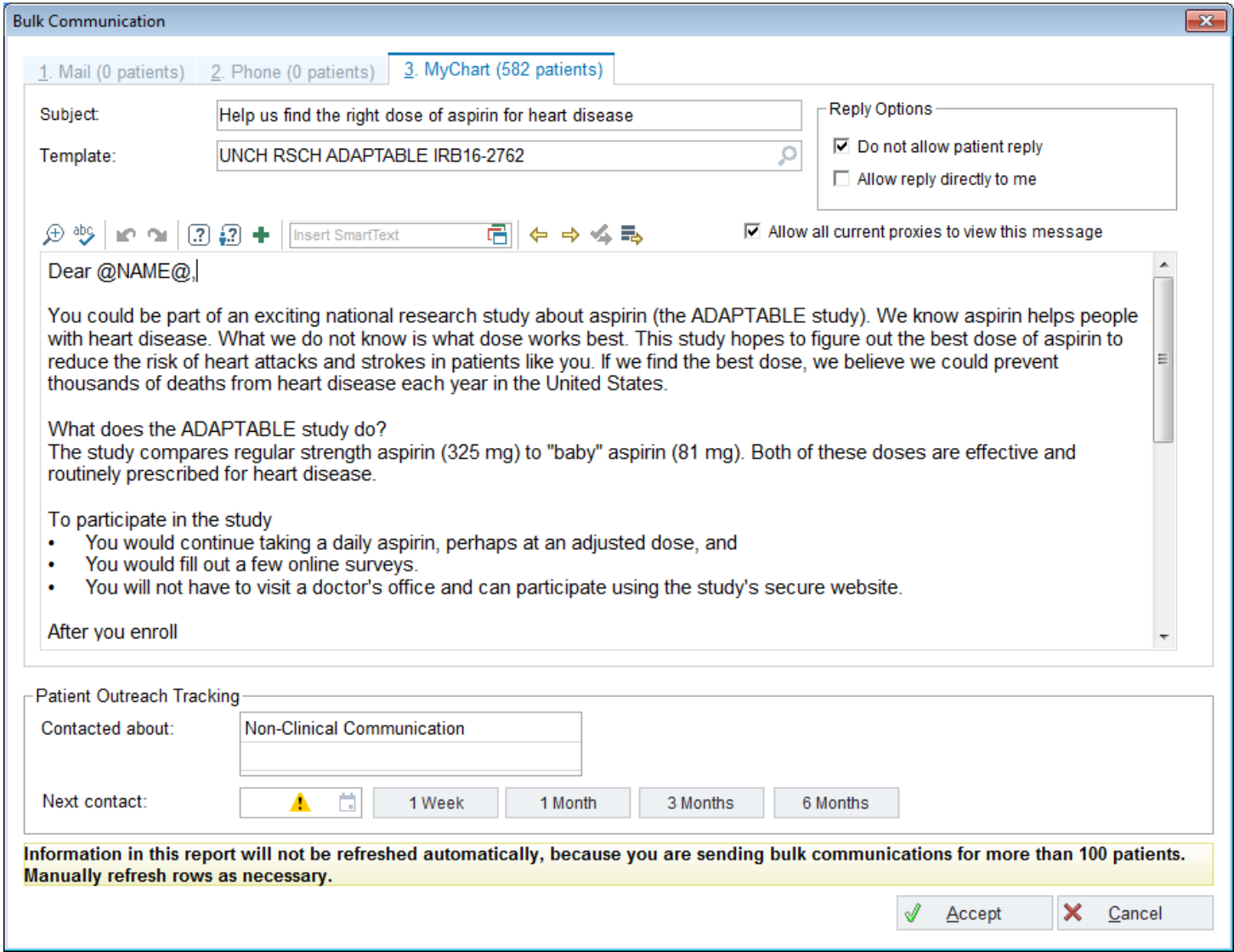
myUNCChart™ Message





myUNCChart™ Message

UNC Health Care
01/29/2020 01:55 PM

Sent with alias

Print Delete

Early Check: A study testing babies for rare health problems

Research Opportunity: Early Check
Early Check: A study testing babies for rare health problems

Principal Investigator
Cynthia M. Powell, MD, MS

Formatting Allowed
(Bold, Italics, Underline and Colors)

Overview

- We are inviting you to take part in Early Check, a research study.
- Early Check offers free screening tests to check your baby for rare health problems. Right now Early Check is testing for spinal muscular atrophy (SMA), fragile X syndrome, and certain types of muscular dystrophy.
- Early Check is a partnership between UNC-Chapel Hill, Duke University, Wake Forest School of Medicine, the North Carolina State Laboratory for Public Health, and RTI International.
- Sign up and learn more at https://portal.earlycheck.org/MyUNCChart.

Study Specific Links

Description
We are inviting all women who recently visited a UNC Health Care OB clinic to take part in Early Check. Early Check is a research study. Early Check offers babies free screening tests for rare health problems that are not part of regular state newborn screening.

In NC, all babies have a heel prick in the hospital for regular newborn screening. Early Check uses those same drops of blood to do extra screening tests. There's nothing else that Early Check needs from you or your baby, but mothers do need to sign up online first.

The health problems included in Early Check depend on when the baby is born. Babies born **before May 1, 2020** will be checked for spinal muscular atrophy (SMA) and fragile X syndrome. Babies born **on or after May 1, 2020** will ***also*** be checked for Duchenne and some related muscular dystrophies. To learn more about these health problems, visit https://portal.earlycheck.org/MyUNCChart.

Early Check tests for **rare** health problems, so most parents get a normal result for their baby. If your baby's Early Check screening result is not normal, Early Check will provide a second (confirmatory) test and genetic counseling at no cost. We will also help you to find specialty medical care for your baby.

Mothers can join Early Check if they are more than 12 weeks pregnant, or recently had a baby who was born in NC. But you must sign up online before your baby is 31 days old.

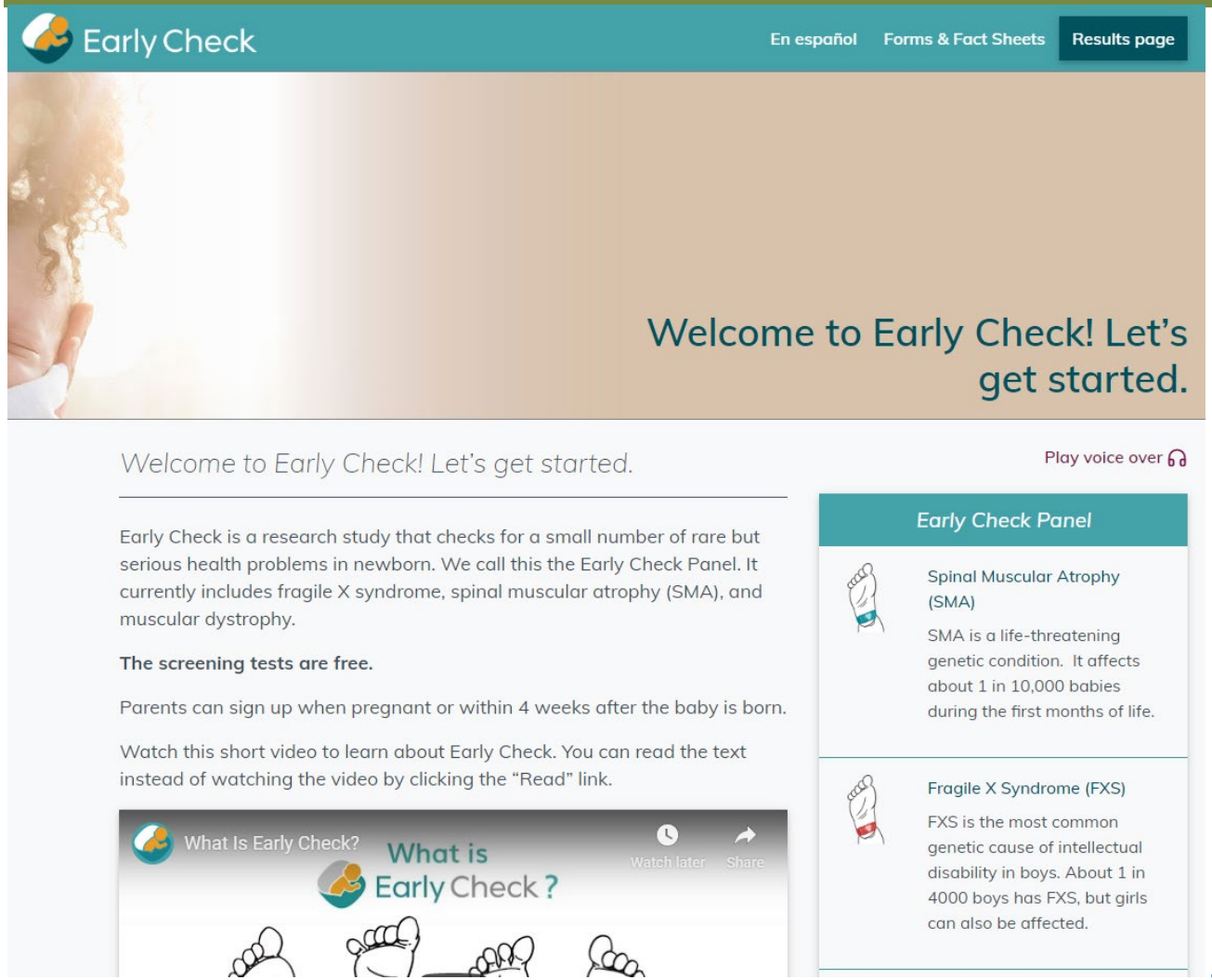
Learn more
To learn more about Early Check and decide if you want to sign up, visit Early Check's secure website: https://portal.earlycheck.org/MyUNCChart.

REPLY The sender indicated replies are not allowed.

Replies Prohibited

CAL

myUNCChart™ Message



Patients clicking the link leaves UNC Health MyChart and enters the study website.

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myUNCChart™ Integrate

UNC Health Care
12/13/2019 01:54 PM

Print Delete

Help us find the right dose of aspirin for heart disease

Dear Research Zztest,

You could be part of an exciting national research study about aspirin (the ADAPTABLE study). We know aspirin helps people with heart disease. What we do not know is what dose works best. This study hopes to figure out the best dose of aspirin to reduce the risk of heart attacks and strokes in patients like you. If we find the best dose, we believe we could prevent thousands of deaths from heart disease each year in the United States.

What does the ADAPTABLE study do?
The study compares regular strength aspirin (325 mg) to "baby" aspirin (81 mg). Both of these doses are effective and routinely prescribed for heart disease.

To participate in the study
· You would continue taking a daily aspirin, perhaps at an adjusted dose, and
· You would fill out a few online surveys.
· You will not have to visit a doctor's office and can participate using the study's secure website.

After you enroll
· The ADAPTABLE research team will e-mail a survey to you.
· After you complete that survey, you will receive $25 to thank you for your time.
· Then, the ADAPTABLE research team will e-mail short health surveys to you every 3 to 6 months, for up to 2 years.

Your input may help researchers and doctors learn how to best treat heart disease. Your participation is voluntary. If you decide not to participate, your care at UNC Health Care will not be affected.

To see if you are eligible and to learn more about the ADAPTABLE, please answer our single-questions survey here: SURVEY

Plain Text URL: redcap.unc.edu/plugins/adaptable_survey.php?sid=1zbR4prrbwzsQe46ccbQyw==

Link to REDCap Project

You can also contact us at adaptable@unc.edu or call our team's research coordinator, Study Coordinator, at (999) 555-1234.

Encrypted Patient Identifier used for linking and management

Thank you for your time.

Research Principal Investigator
UNC Health Care

REPLY The sender indicated replies are not allowed.

NICAL

myUNCChart™ Integrate

REDCap™

ADAPTABLE Aspirin study to help reduce heart attacks and strokes

Dear Research Zzztest,

You could be part of an exciting national research study about aspirin (the ADAPTABLE study). We know aspirin helps people with heart disease. What we don't know is what dose works best. This study hopes to **figure out the best dose of aspirin to reduce the risk of heart attacks and strokes** in patients like you. If we find the best dose, we believe we could prevent thousands of deaths from heart disease each year in the United States.

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- You would fill out a few online surveys.
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All formatting permitted. Images, Colors, Fonts, Audio, Video, and Attachments available.

After you enroll

- The ADAPTABLE research team will e-mail a survey to you.
- After you complete that survey, you will receive $25 to thank you for your time.
- Then, the ADAPTABLE research team will e-mail short health surveys to you every 3 to 6 months, for up to 2 years.

Your input may help researchers and doctors learn how to best treat heart disease. Yo
you decide not to participate, your care at UNC Health Care will not be affected.

To see if you are eligible and to learn more about ADAPTABLE, visit the study website: www.adaptablepatient.com and **enter this special code: VLRPW.**

Study Links with Unique Identifiers

You can also contact us at adaptable@unc.edu or call our team's research coordinator, Study Coordinator, at **(999) 555-1234**.

Thank you for your time.

Research Principal Investigator

UNC Health Care |

Would you like to see if you are eligible to participate in the ADAPTABLE Aspirin

Interest Tracking & Follow Up Options

- Yes, I am interested.
- I'd like more information.
- I'm not ready at this time.

Please choose one.

reset

Submit

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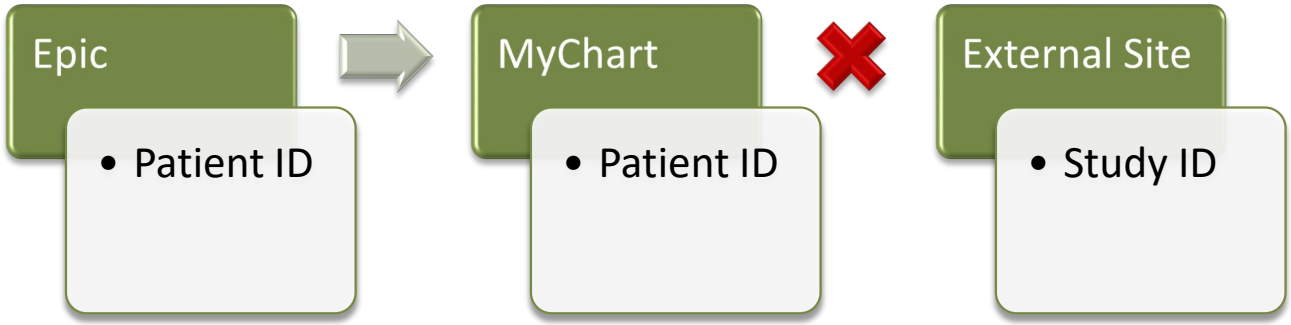
Message versus Integrate IDs

myUNCChart™ Message



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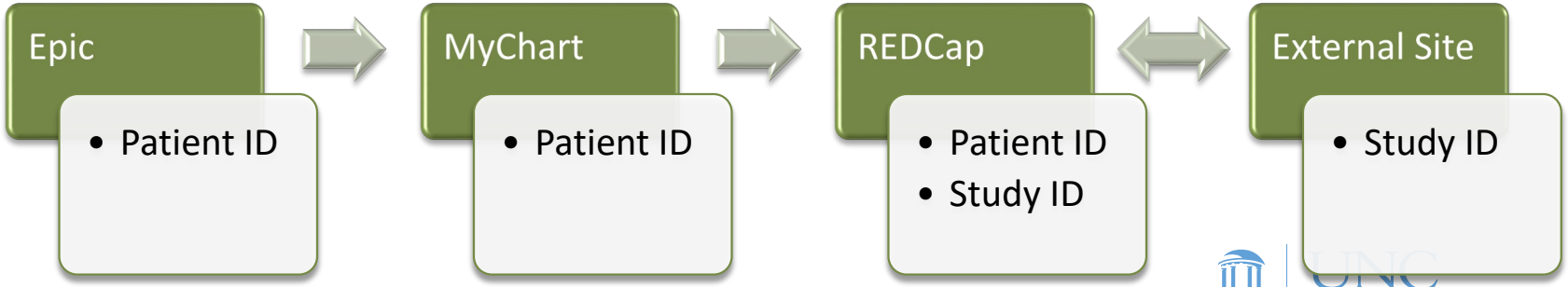

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Results

Service	Patients	Studies	Response	Rate
Foundation	6,875	5	Interested Declined Waiting Retracted	11.33% 7.81% 56.04% 24.81%
Message	56,529	10	Read Unread	54.53% 45.46%
Integrate	9,047	1	Read Unread Enrolled*	65.93% 34.07% 4.2%

Messages read

Study	Type	TOTAL MESSAGES	READ_MSG	READ %	AVERAGE_TO_READ_TIME_DAYS
Study 1	Message	540	354	66%	38.842577
Study 2	Message	8365	4957	59%	46.070045
Study 3	Integrate	9047	5970	66%	81.985567
Study 4	Message	1036	431	42%	2.7587
Study 5	Message	4115	2755	67%	36.286296
Study 6	Message	4878	1958	40%	1.684673
Study 7	Message	1494	724	48%	1.990925
Study 8	Message	13640	10153	74%	9.98394
Study 9	Message	4985	2947	59%	6.868456
Study 10	Message	17398	6608	38%	3.84258
Study 11	Message	78	66	85%	11.389696

Study 10

2535(38%) responses of 6608 READ messages - 14.5% of total messages sent

Summary

- *Foundation*
  - Great for smaller patient groups, or where chart review is needed.
  - Ideal for study tracking and enrollment in Epic
- *Message*
  - Best for mass recruitment where chart review is not needed or a more generalized population.
  - Ideal for surveys, or self-enrollment mechanisms
- *Integrate*
  - Used when features from both foundation and message are needed, or when patient tracking is required to a third-party.
  - Ideal for REDCap, or externally managed studies

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Real-time Recruitment with Epic's Best Practice Advisory

Adam Lee
Stephanie Deen

Research Health Informatics with Epic@UNC

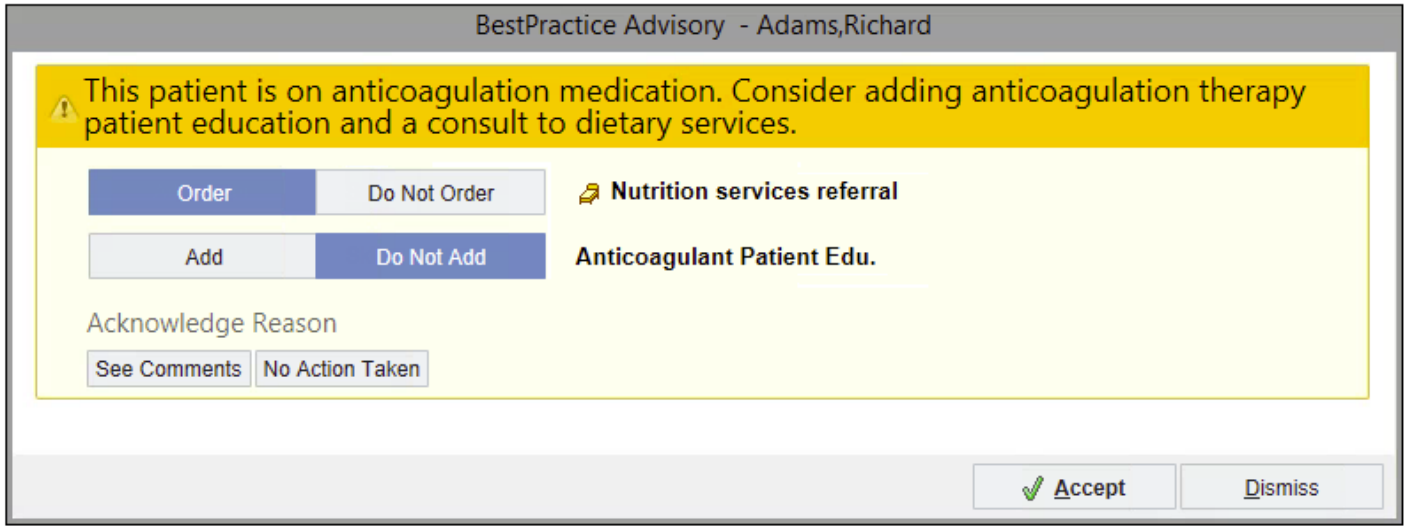
Scenario

- I need to recruit patients that have a hospital admission and positive lab result for influenza.

This is a challenge due to the timing of events and briefness of illness

What is a Best Practice Advisory?

- BPAs are a tool within Epic that provides a visual pop-up box with information or action that are triggered by certain conditions of a patient and/or certain actions taken on a patient's chart. These are called active BPAs.



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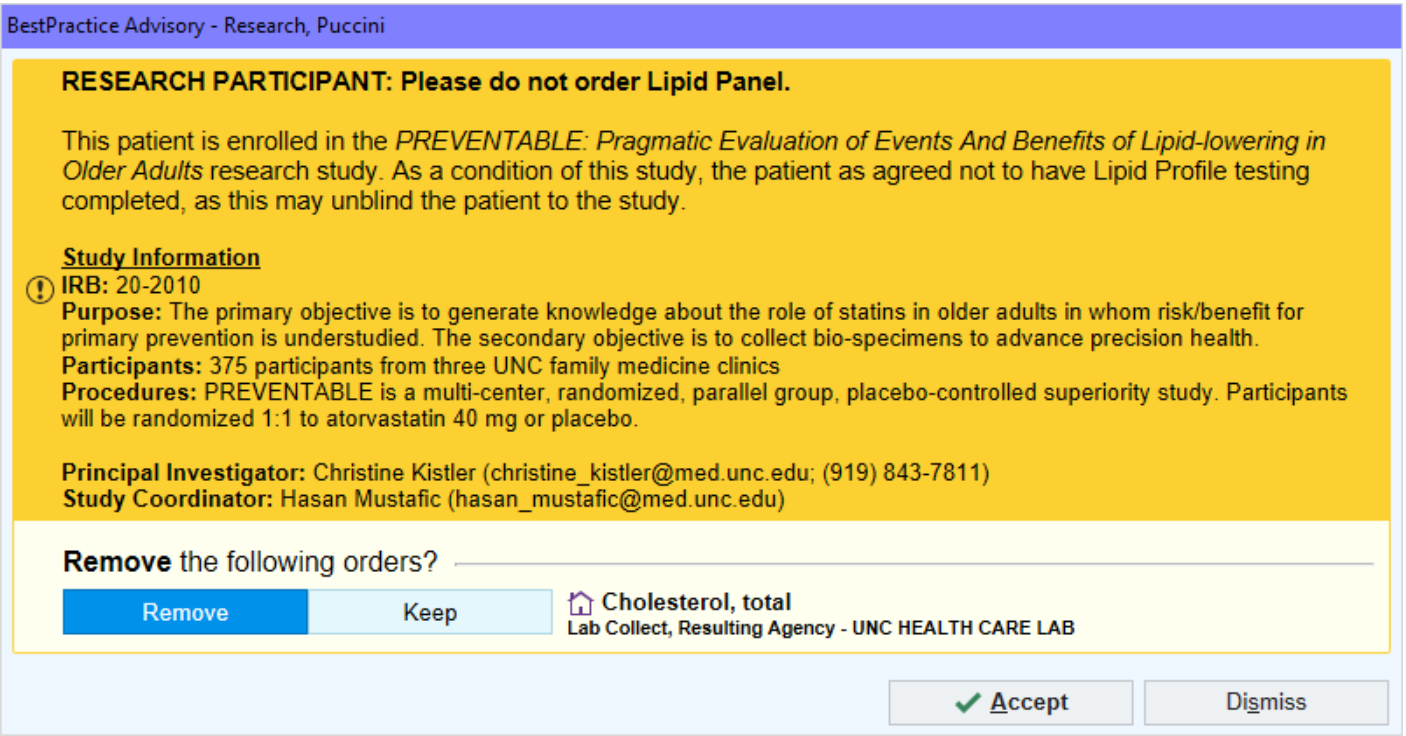
What is a Best Practice Advisory?

- BPA are often seen as intrusive to clinical workflow, and great consideration is given when an active BPA is requested.
- Luckily, we can also create a silent-BPA.
- The silent-BPA does not have any hard-stop alert or visualization. It uses all the same actions and criteria as an active-BPA but sends a in-basket message or page to a study coordinator or group.

Examples of BPA's in Research

- Active BPA – Alert and advisor provider not to order a lipid panel test for enrolled patients as it would un-blind the subject to the research arm.



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Examples of BPA's in Research

- Silent BPA – Send an In-basket message to study team on:
  - Inpatients
  - Troponin (>0.034) followed by Hgb < 10
  - Can only trigger 1 per 24 hours

When to use BPA's for recruitment?

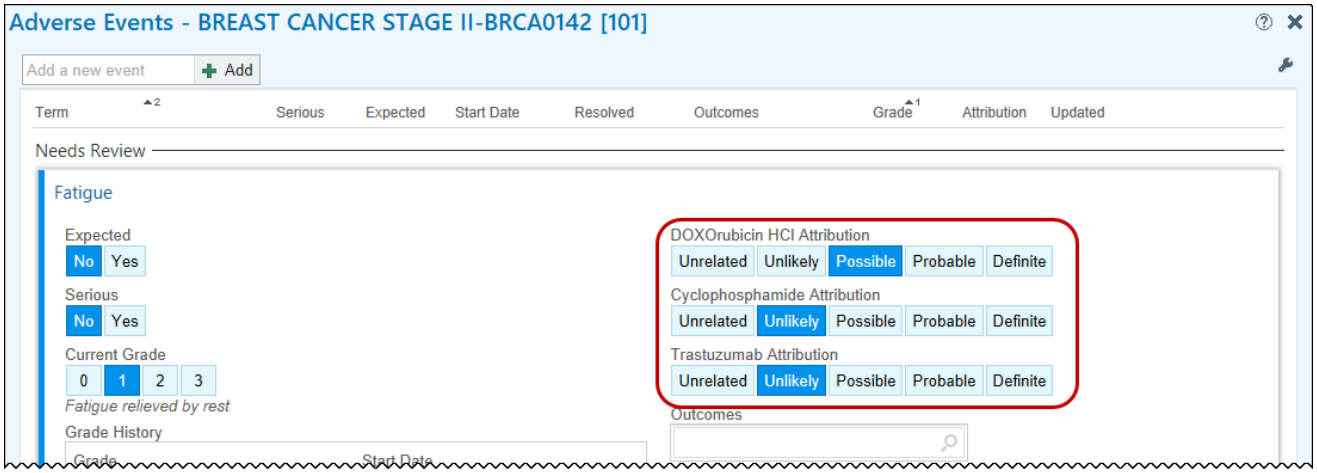
- When real-time events are needed for participant identification.
- When in-person study recruitment is needed in the hospital or clinic (can be outpatient too)
- Use active when its imperative to interrupt workflow or provide clinical action. *BPAs are not used to notify providers to contact study team.*
- Use silent-BPAs as communication method for clinical events.

Epic Release on April 11, 2021

Epic Release on April 11, 2021

Attribute Adverse Events to Certain Medications

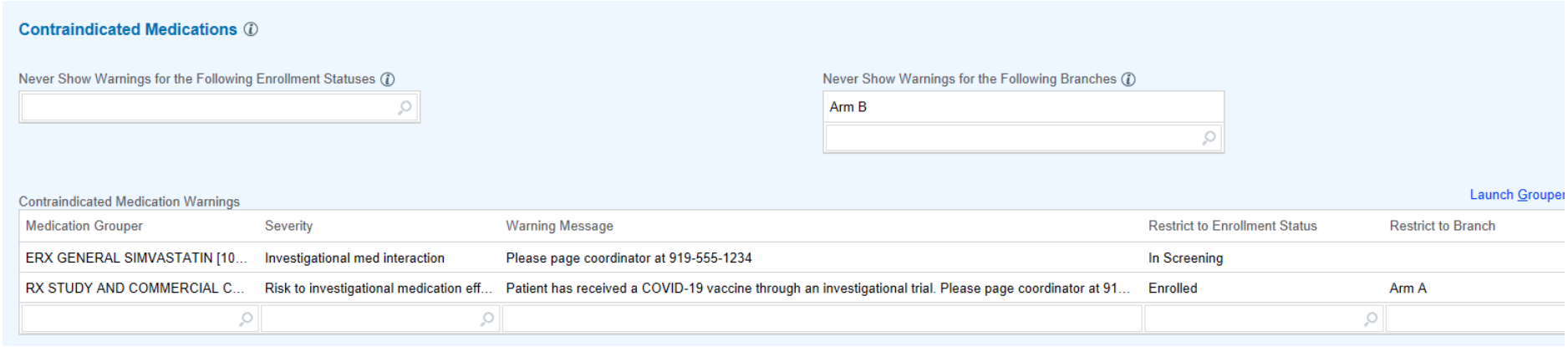
When a patient is participating in an investigational research study, it's possible that an adverse event can be attributed differently for each medication being used in the study. You can now select how an adverse event is attributed to certain medications for research studies.



Epic Release on April 11, 2021

Restrict Contraindicated Medication Warnings by Enrollment Status or Branch

To show only relevant contraindicated medication warnings to clinicians, you can now specify the enrollment statuses and branches that warnings should appear for.



Standardized Research Billing Review

04.15.2021

Standardized Research Billing Review

What is Standardized Research Billing Review?

- Standardized Research Billing Review is a holistic approach to the Research Billing process. This will include comprehensive review of all encounters for a patient active on a research study via a two-tier Research Billing Review process.
  - A patient who is tagged as “In Screening,” “Enrolled,” or “Off-Treatment” is considered an active patient.
  - All encounters will go through this process and not just the encounters that have been linked to the research study.

Why?

- Standardized Billing Review will improve accuracy and compliance with research billing procedures. This new operational process will also reduce administrative burden related to billing review for research teams.

Standardized Research Billing Review

What does this mean for our Research Users?

- Research Coordinators will be responsible for the following items to ensure a smooth transition to Standardized Research Billing Review process for all UNC sites:
- Link research encounters to the research study
- Maintain accurate and current Patient Research Study Statuses (aka Enrolled, Completed, etc.)
- Add and maintain Patient Timelines in Epic
- Utilize SmartText for research encounters
- The research study team will still be handling all invoice payments to UNC Health, if applicable to your team.

Standardized Research Billing Review

FAQs

Q. *Won't reviewing all encounters for an active research patient generate a lot of work?*

A. Yes, because all encounters will be going through the Two-Tier Research Billing Review Process, there will be more items to review. However, this will help ensure we are remaining accurate and compliant with Research Billing. The research study team will need to link encounters and add the patient timelines in Epic in order to help expedite this additional volume of review.

Q. *Will Chapel Hill research study teams be completing Research Billing Review?*

A. No. The research billing review that has historically been completed by the research study team will now be managed centrally.

Q. *Who will be completing the Standardized Research Billing Review process for Chapel Hill research study teams?*

A. UNC Health Rev Cycle will be completing both tiers of review. But it is important that the research study team to fulfill its responsibilities so that the UNC Health Rev Cycle team can efficiently perform its reviews.

Standardized Research Billing Review

FAQs

Q. *What if my research study will never generate a charge in Epic?*

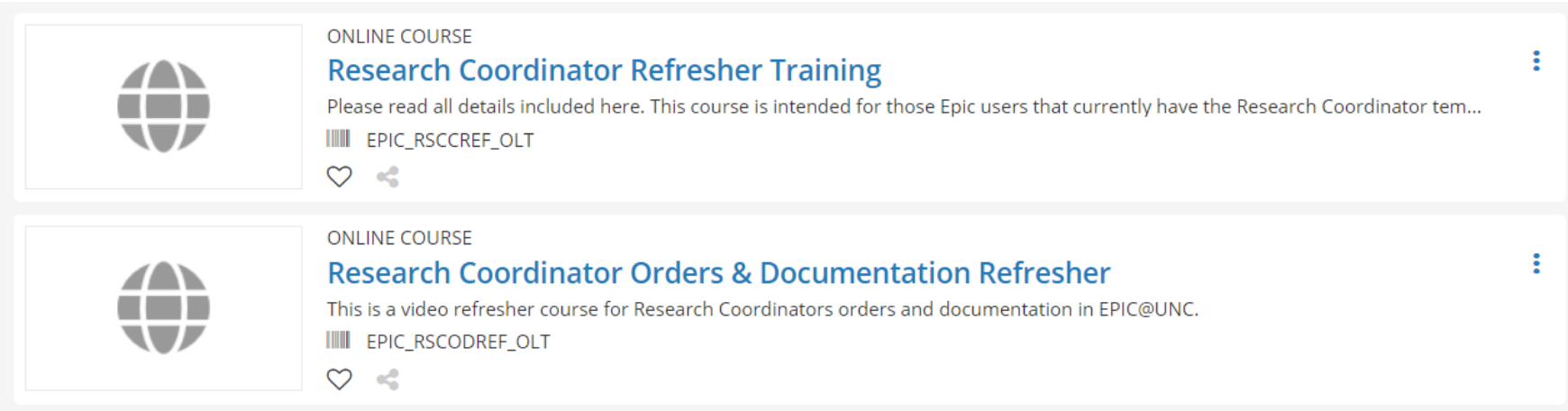
A. Please reach out to the BCA Coordinator team or the ORSC Finance team (whichever is appropriate for your study team) with your IRB number. They will review the BCA and if it meets the appropriate criteria, a flag can be added to your study in Epic. This flag will allow the patients involved in this study to bypass Research Billing Review.

Q. *What will change for the UNC Health Network Entities in the new standardized process?*

A. If you are a research coordinator or research biller, you will review all encounters rather than just linked encounters. Research coordinators will also complete the first tier of review.

Standardized Research Billing Review

Please log into UNC Health LMS and complete the Research Refresher Course that's been assigned to all users with Epic Research access.

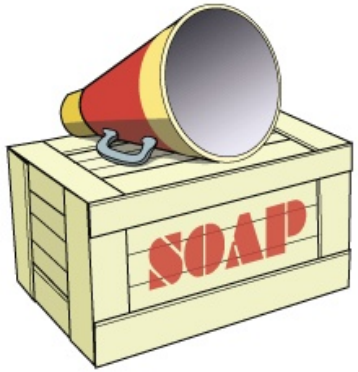


Friendly Reminders

Don’t forget to link encounters and orders to the research study.

Don’t forget to update your patient research status (Enrolled, Completed) in real time in your Clinical Trial Management System.

Don’t forget to use your Research Smart Text to help identify which visits are part of your research study.



Contact Information

TraCS

Request a Consult

MyChart Research Recruitment Request

Link located in your IRBIS Application

Epic@UNC Research

EpicUncResearch@unchealth.unc.edu

Epic MySupport Tickets

Report an Issue