Documentation of a research study visit in the Electronic Medical Record may be necessary if the visit involves procedures that would be considered "billable" in a regular office visit; is required by the study sponsor; is relevant to the patient's continuity of care; or is otherwise being done at the care provider's discretion.

When clinical research study documentation is entered, the SLUCare policy states that documentation will be created, using a research note template, and entered into the patient's electronic medical record by the principal investigator and/or research staff.

Detailed instructions on how to access the Research Note activity and complete the research encounter workflow is included in this document.

Finding the Research Note Activity

When research documentation will be entered, it can be written within the "Research Note" activity in an Epic office visit encounter.

The "Research Note "activity is found under the "More" button on the bottom of the activity toolbar within the encounter. This activity can also be saved as a favorite by clicking the ☆ next to the activity in the menu.
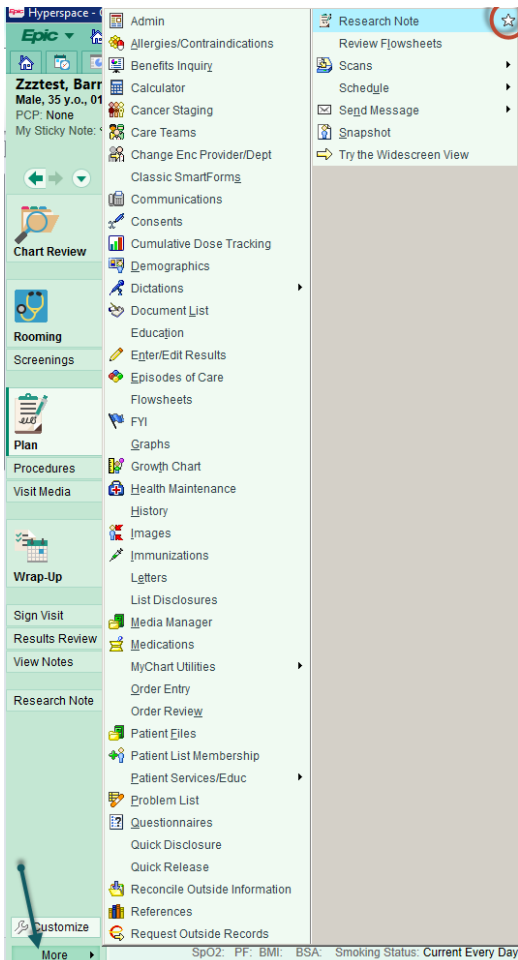
Creating a SLU Research Encounter Using Epic SmartSets

An Epic Research Encounter SmartSet can be used to streamline the entry of encounter information for research visits. This SmartSet automatically enters standardized information into the patient encounter which significantly decreases the amount of time it takes to complete the visit. The follow information will be autocompleted, using this tool:

- Diagnosis
- Level of Service
- Chief Complaint

To access the Research Encounter SmartSet:
1. Click on the Plan Activity
2. Click the SmartSets section
3. Type "Research" into the search field and click the enter key on the Keyboard
4. Click the Open SmartSets button
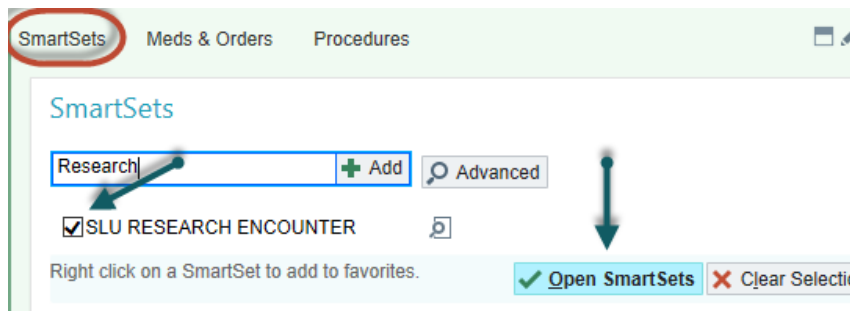
5. When the SmartSet opens review the auto-populated information to ensure it is appropriate.
   - To edit any of the fields, click "details" and update as needed
6. Click Sign to complete the SmartSet
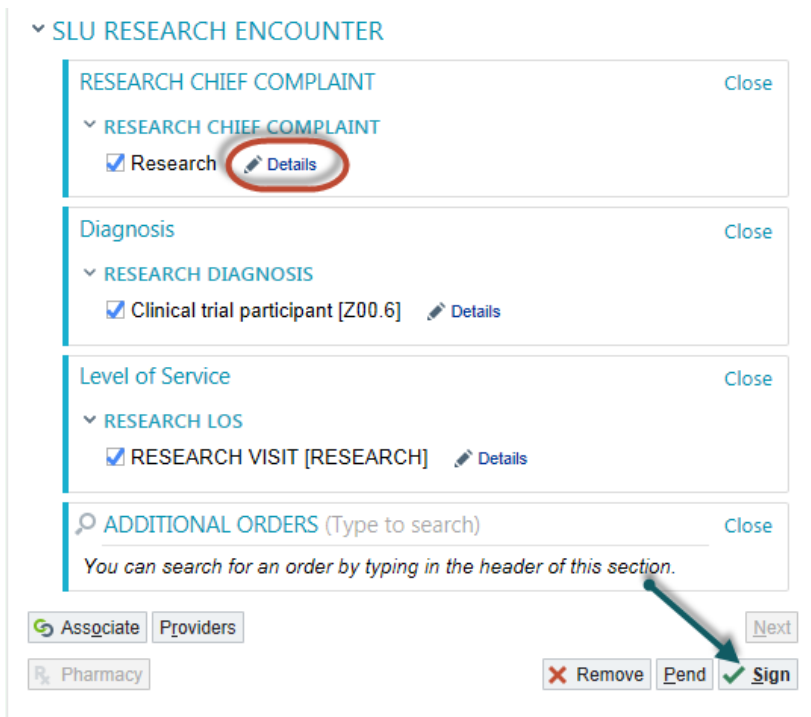
Using SmartPhrases for Research Notes

SmartPhrases are an efficient way to document within Epic. For research notes, the SmartPhrase template will ensure that all required information is captured for the study while making documentation easy. Each study will require a SmartPhrase specific to that study. Please review the following guidelines before documenting research in the medical record or creating a note template.

Research Note Guidlines

A research note should include the following information:

- Study Name
- IRB#
- Study Contact
- Principal Investigator
- Department
- Study Visit Number
- Clinically Relevant Information obtained during the visit

A research note should <u>not</u> include the following information:

- Psychiatric disorders, psychological well-being (including dx and/or treatments)
- Substance use
- Sexual practices
- Illegal behaviors
- Infectious diseases
- Genetic information obtained from sources outside of SLUCare
- Lab results obtained from sources outside of SLUCare, unless relevant for clinical care.
- Research with a certificate of confidentiality
- Questionnaires or surveys done for research only
- Case report forms

Using a SmartPhrase for Documenting in Epic

Once the SmartPhrase has been created, (See the "Creating and Editing a SmartPhrase in Epic" section of this document) it can then be pulled in to the research note by typing a period (.) followed by the name of the SmartPhrase. For example: .STUDY
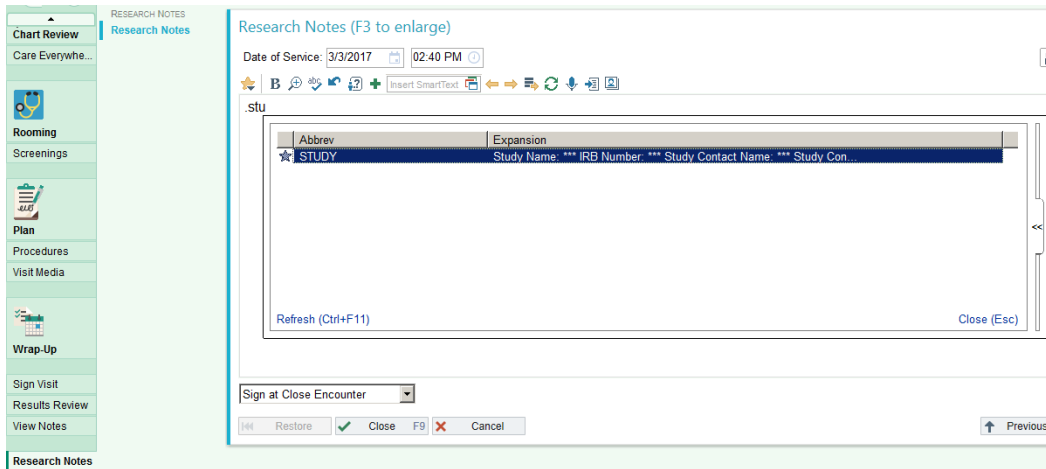
The SmartPhrase template will display within the Research Notes field and should be completed as appropriate. Wildcards (***) and SmartLists can be easily accessed by clicking F2 on the keyboard. Below is an example Research Documentation Template

Creating a SmartPhrase in Epic

To create a SmartPhrase:

1. Follow the path **Epic button > Tools > SmartTool Editors > My SmartPhrases**.
2. The SmartPhrase list window displays
3. Click the New button.
4. Name the SmartPhrase: type user initials followed by a descriptive name for the SmartPhrase (ex:CLGSTUDY)
5. In the text box create the template that will be used for the SmartPhrase
6. Click **Accept** to save your changes
7. Click **Close** to exit the SmartPhrase List activity