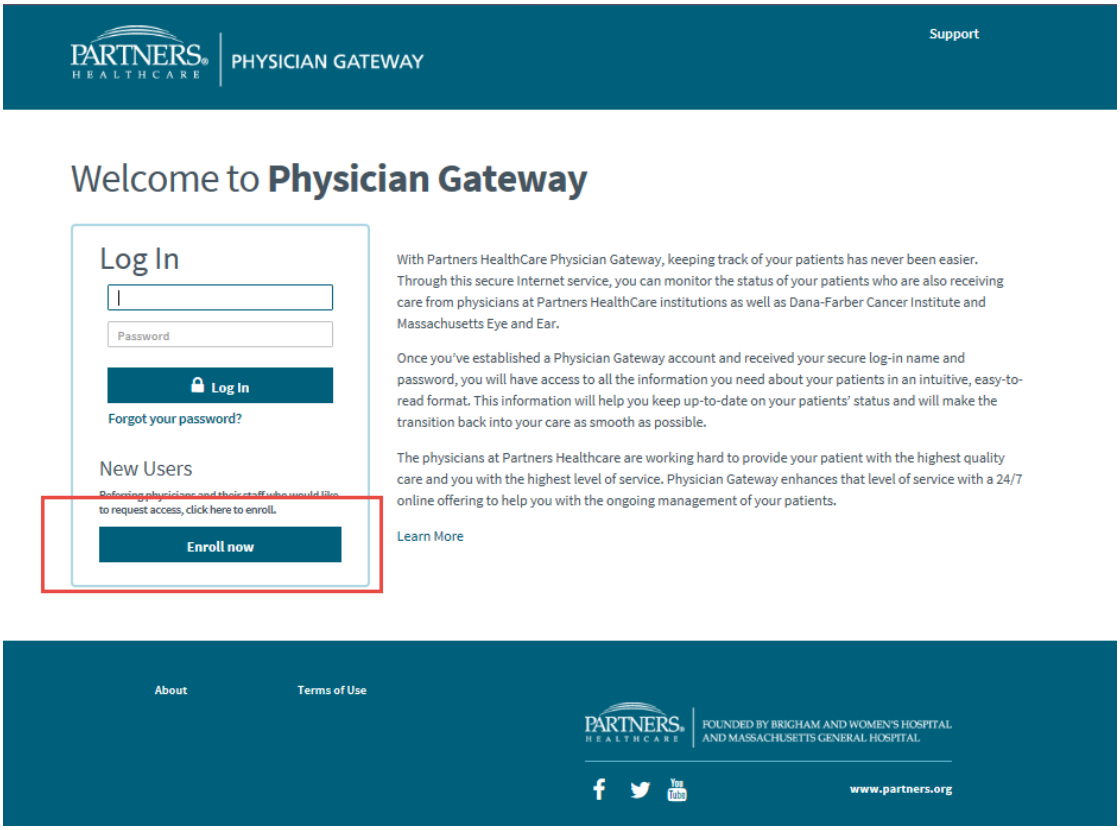
Release of Information for Study Monitors

Release of Information for Study Monitors utilizes Epic's Physician Gateway. Physician Gateway was primarily designed to give providers at affiliated facilities access to patient records. Research is utilizing this to also release information to research study monitors. Monitors only see patient charts released to them by the Clinical Research Coordinators (CRC). Monitors are able to view this information remotely.

CRC's are responsible for making sure their monitors have accounts set up and have been given access to the correct patient groups well ahead of the monitoring visit. The first step is always to check the monitor account spreadsheet. If the monitor is on the spreadsheet, check if the email address is still correct and if the monitor needs to be linked to an additional patient group for your visit.

If the monitor does not already have a Partners Physician Gateway account -- submit a New Account Request.

1. **Navigate** to: https://physiciangateway.partners.org/securelogin/login.aspx.
   Note: study coordinators do not need a Physician Gateway account to request monitor access. Simply **Click** "**Enroll Now**".

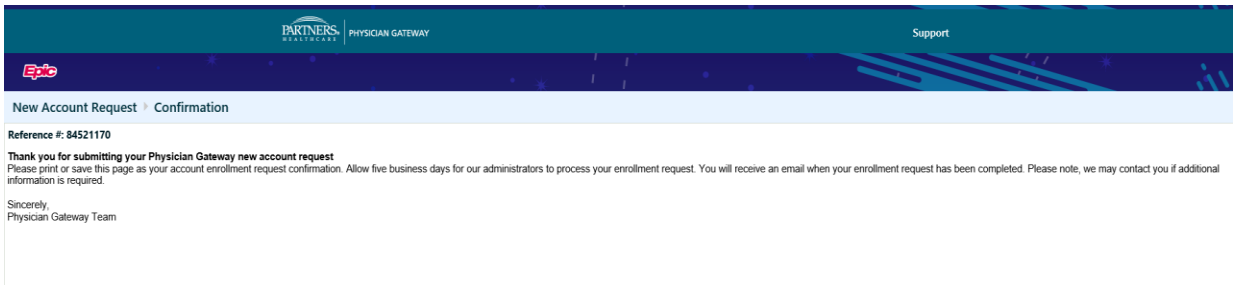


2. Choose '**Request Access for a new non-clinician or study monitor**", click **Continue**

3. Enter information about the study monitor. Items with a **Red exclamation point** are required.

Required fields:

- Monitor name – this must be Last Name, First Name or will cause an error
- Site name – use your institution; DFCI, MGH, BWH, etc
- Monitor phone
- Monitor text-enabled mobile phone to receive temporary password
- Monitor date of birth *(If the monitor declines to provide a date of birth use 01/01/1980)*
- In the Other, Reason for Access field, enter the **Epic Study Code** (ex: 12-345 (Oncology protocols) or 2013P000123-000111 (NonOncology protocols) and **Sponsor company name**
- Enter the monitor's work email – **please copy and paste this as it becomes the monitor's username and any typo will cause an error.**
- Include your contact phone number in the Other, Reason for access field
- Enter your name in the Requested By field. When you are finished, **click** Submit Request
- You will instantly be shown a Confirmation message with a Reference number. Make a screenshot for future reference; this is not emailed to you and can't be retrieved once dismissed. If you do not receive this, the submission failed and must be done again.



Partners eCare (PeC) Research Team will create an account for the monitor and link the monitor to the requested patient group, building a new patient group if necessary.

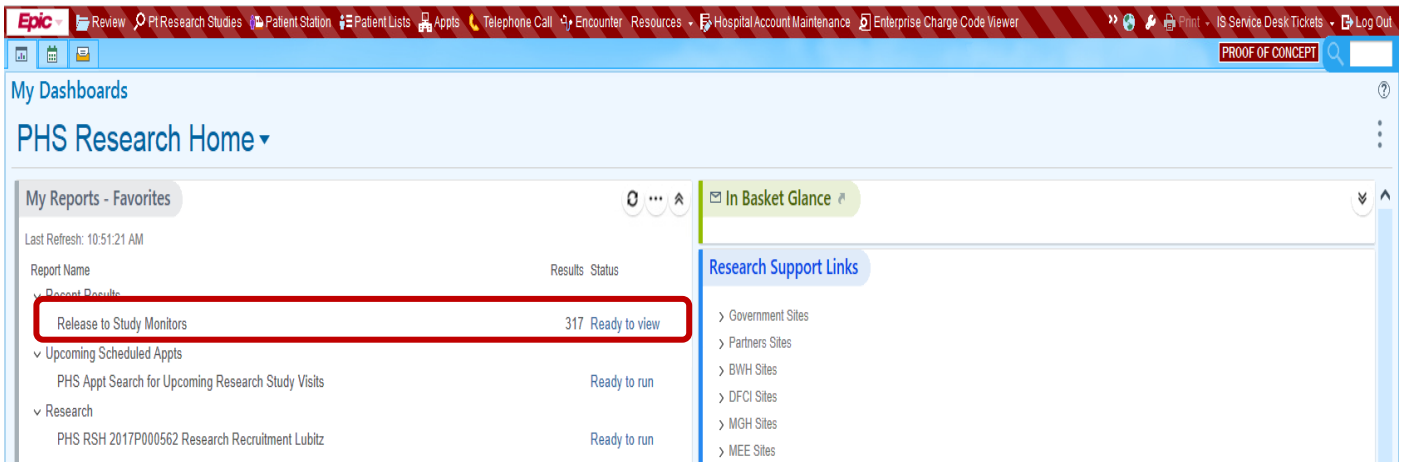
If the monitor does already have a Partners Physician Gateway account -- submit a helpdesk ticket to the PeC Research Team. All changes to an existing account, including new job, new email, new name, adding or deleting patient groups, are handled by helpdesk ticket. If there has been a job/email change, always include the monitor's cell phone number in your ticket, even if it hasn't changed.

Once a monitor's account has been authorized the monitor will receive a welcome email from noreply@partners.org. The CRC should inform the monitor of this in advance so they know what to expect. The monitor must check the Inbox, Deleted and Junk folders to retrieve the email. If the monitor reports he/she has not received the email, verify there are no typos in the email address. If the email address is correct, the monitor must reach out to their own IT department to retrieve the email. The welcome email contains a link that is live for FIVE DAYS only. The monitor must use the link to complete personal password set up. Failure to complete these steps within five days will jeapordize the monitor's access to the electronic medical record and will a require a helpdesk ticket from the CRC. These tickets will be processed per the turnaround timeline of 3+ business days, even if the monitor is on site and the visit is underway.

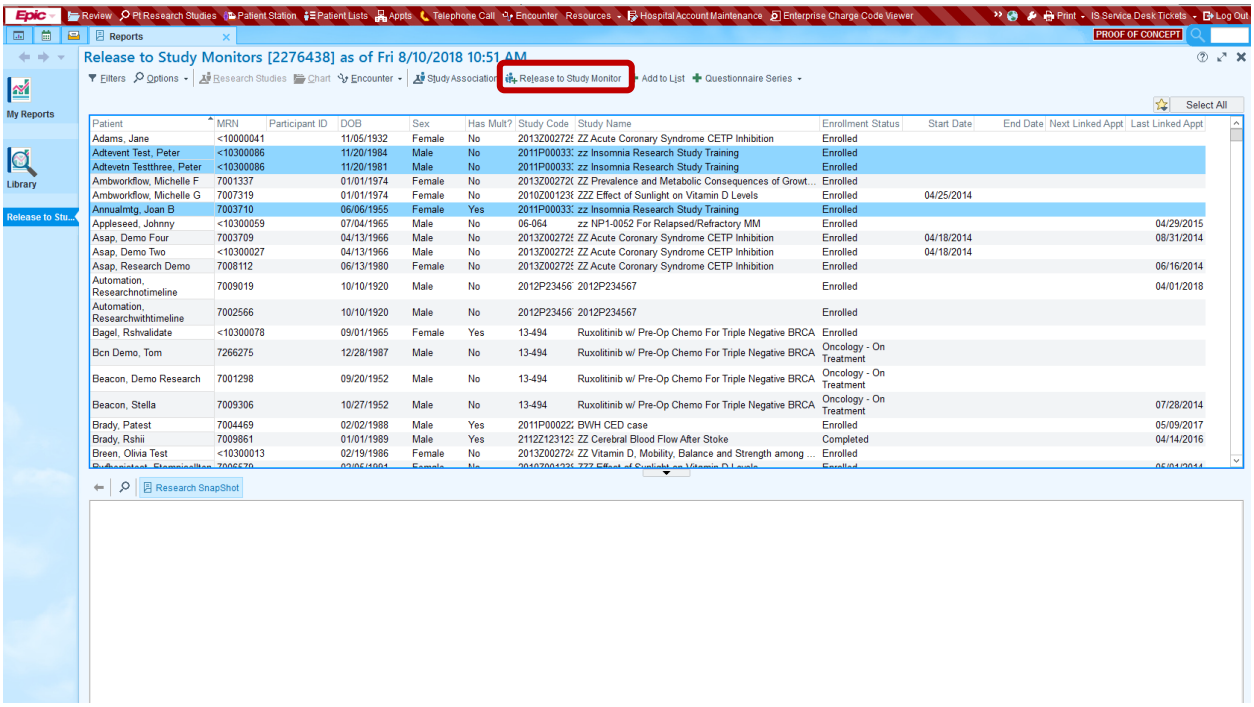
When the monitor has received the email, he or she will follow the link to sign in to Physician Gateway, https://physiciangateway.partners.org/securelogin/login.aspx. Initial login is the email address as username and the temporary password provided by text. The monitor will follow the steps to set a personal password.

Releasing patient charts to monitors

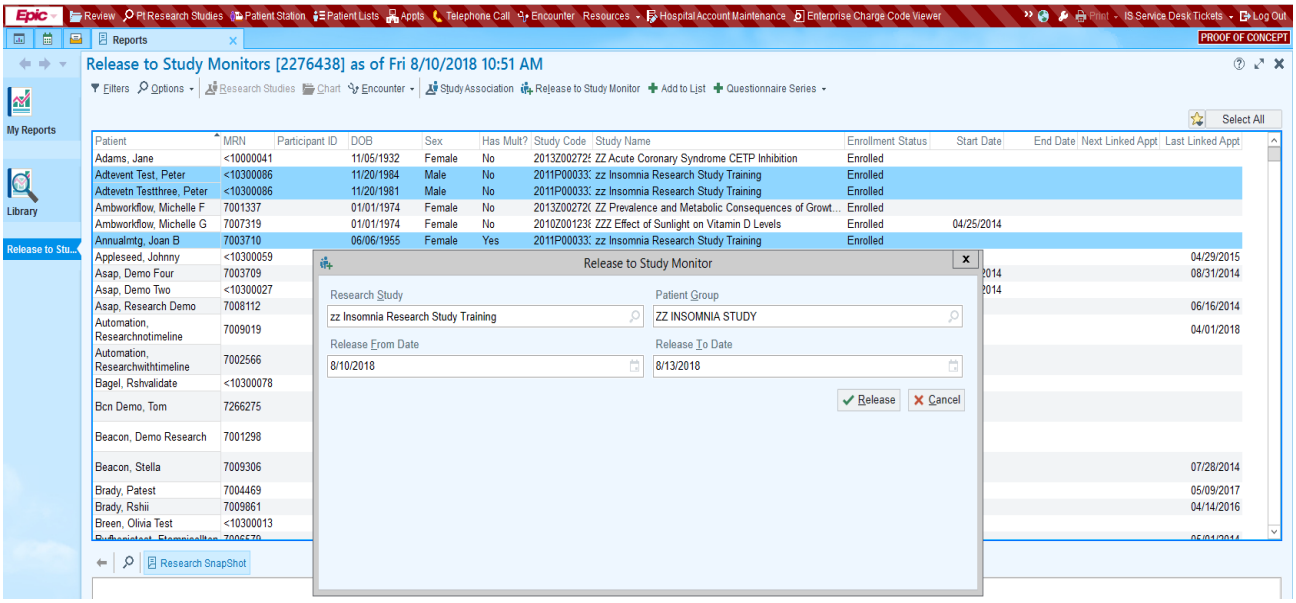
From the My Reports section of your dashboard, go to the Library. Search for Release to Study Monitors. Right click on the report, chose Edit, and Save As with your name to keep your own personal copy. Click the star to add this personal version to your favorites. Click Run.



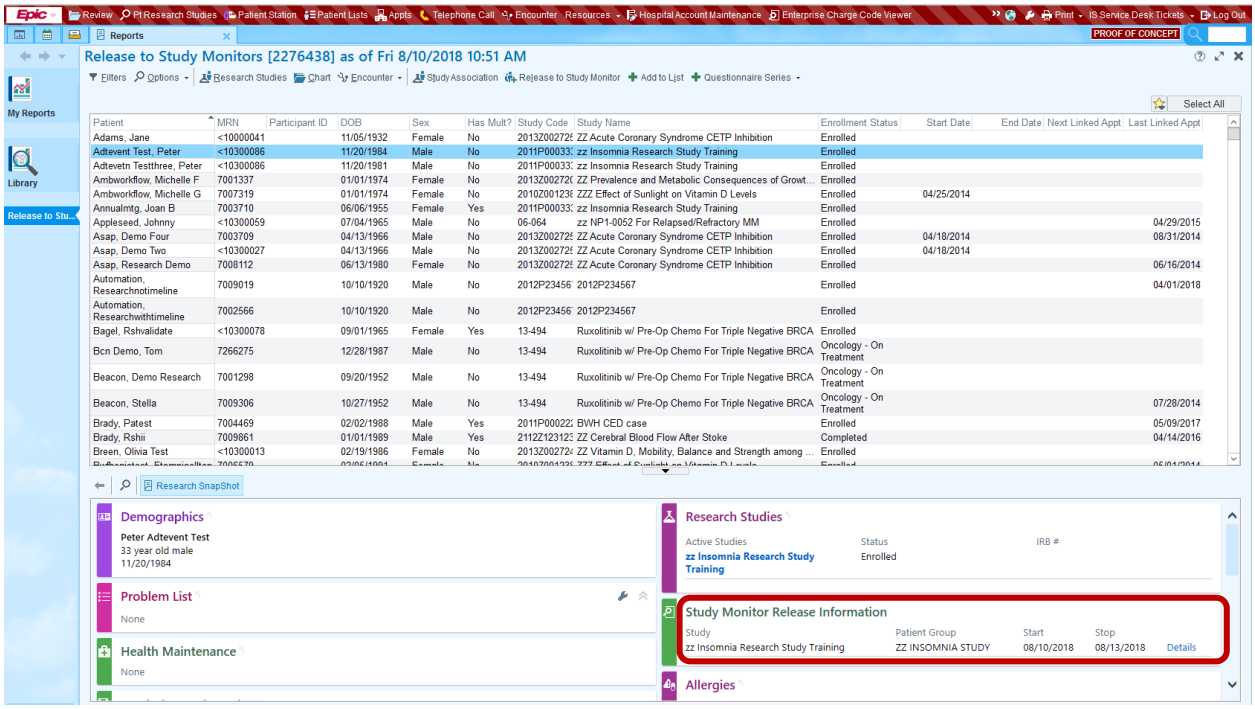
Use the Shift and Control keys to select the patient records to be released. Click the Release to Study Monitor button.



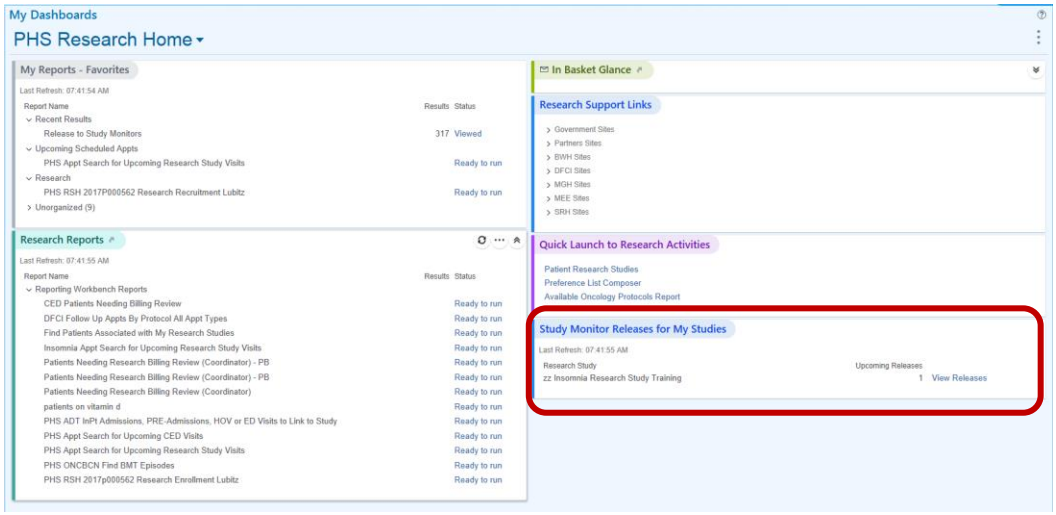
Choose the research study and matching patient group. Set the date range for the charts to be visible to the monitor. Click Release. The monitor will now see the released records in Physician Gateway.

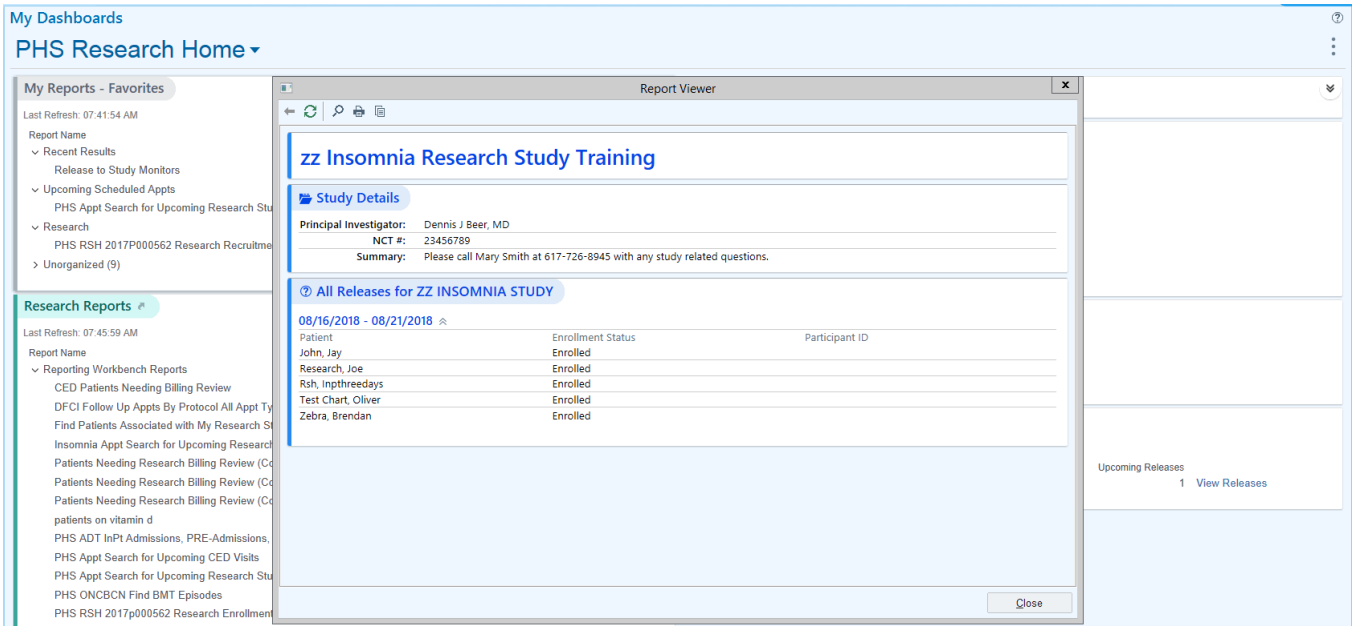


The patient snapshot will display the Study Monitor Release Information.

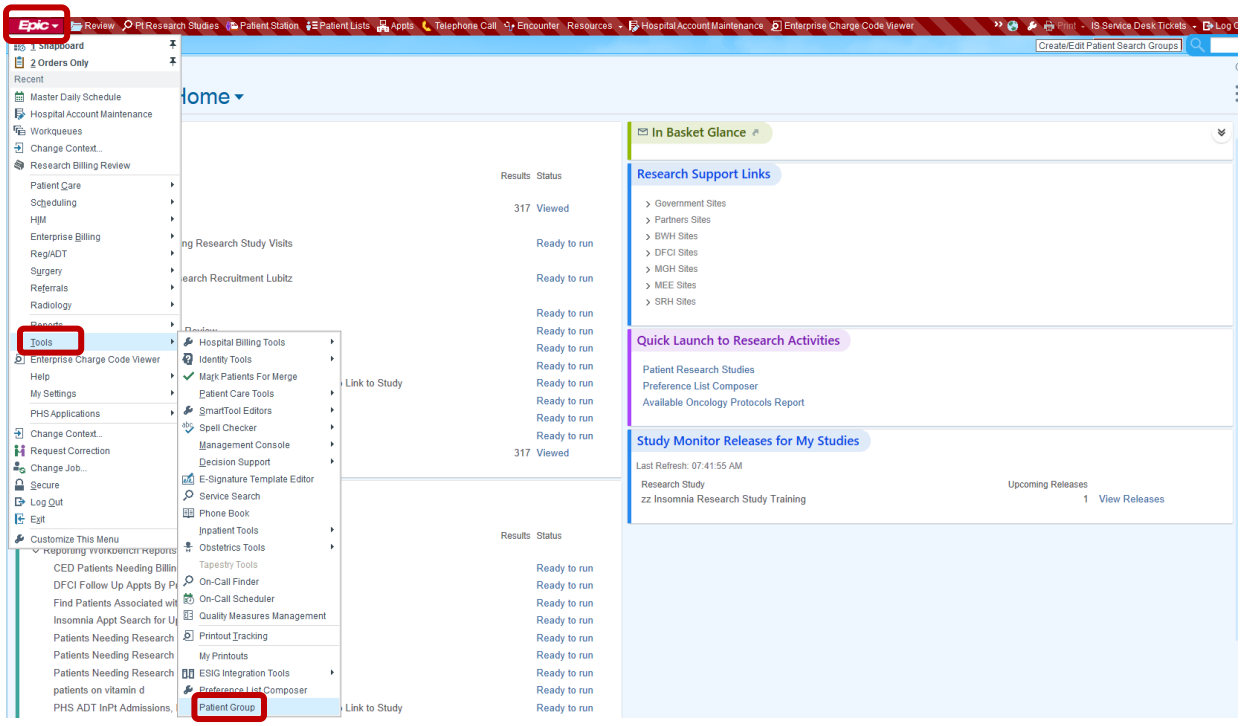


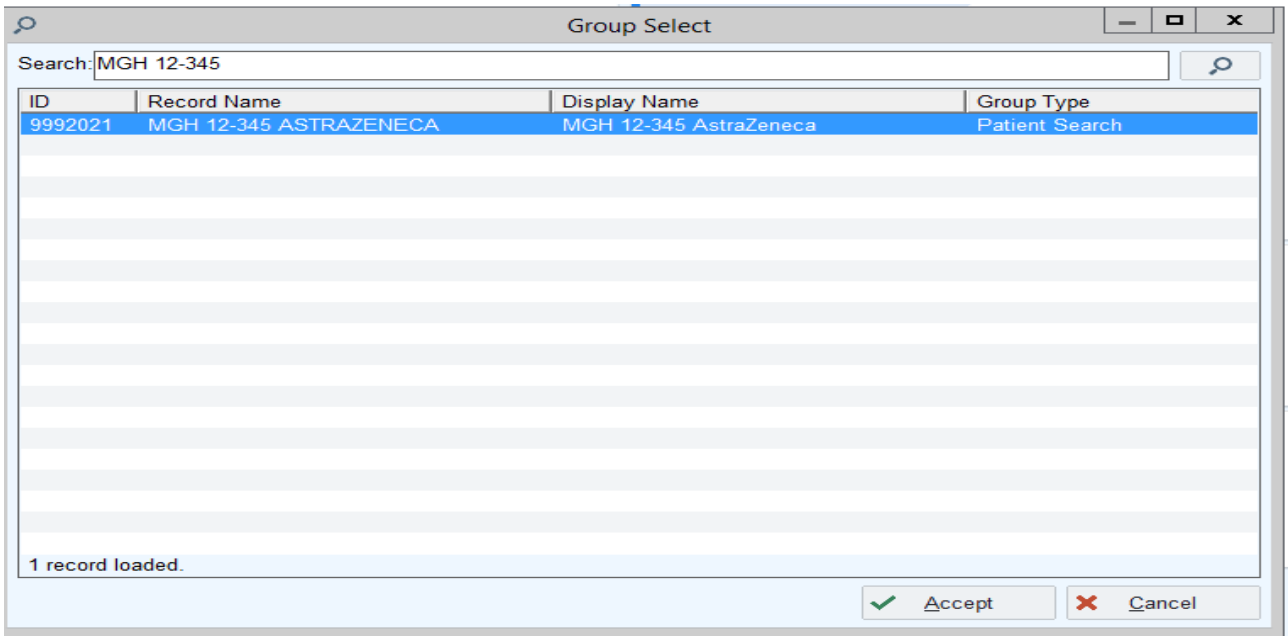
Go to the Study Monitor Releases for My Studies section of your dashboard to view your current or upcoming releases.

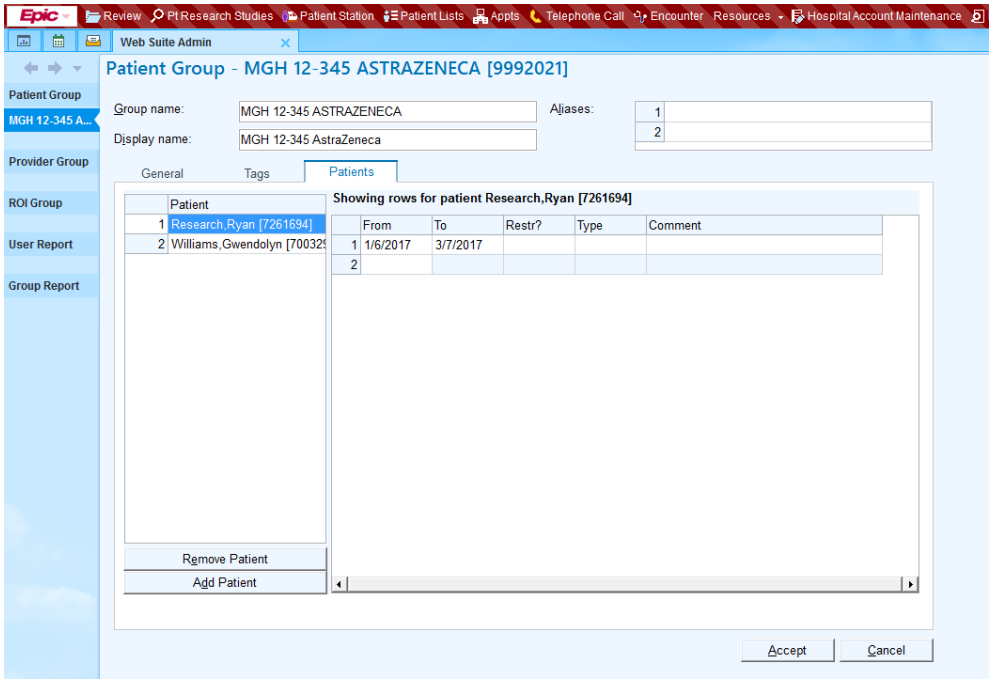




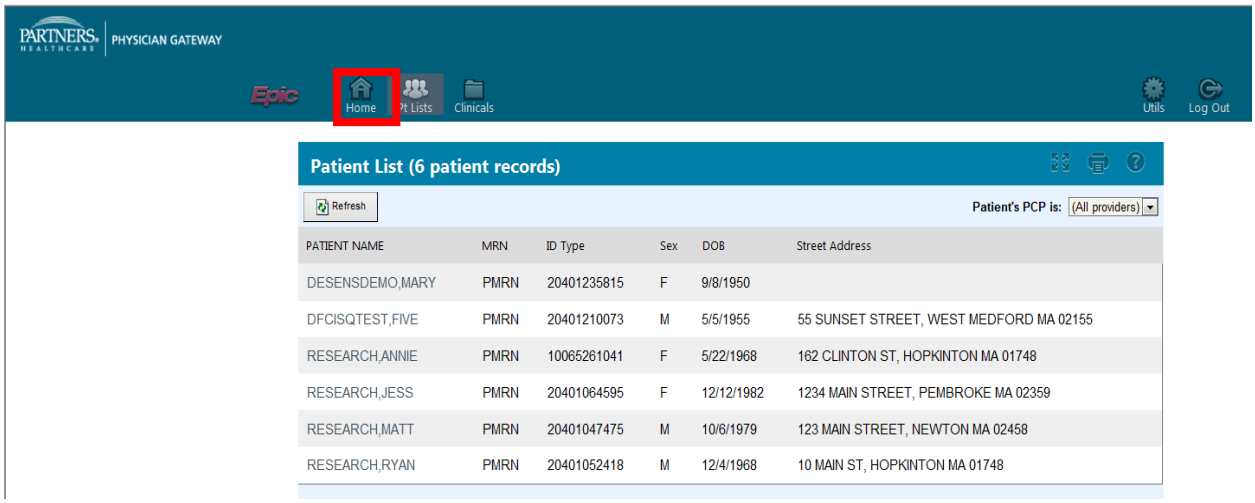
Once a release is set, edits to the release – removing a patient, changing the date range – must be done in the Patient Group itself. Epic button/Tools/Patient Group. Search by patient group name for your institution. Go to the Patients tab to make changes to the date range or patient list.




Group Select
Search: MGH 12-345
ID
Record Name
Display Name
Group Type
9992021
MGH 12-345 ASTRAZENECA
MGH 12-345 AstraZeneca
Patient Search
1 record loaded.
Accept
Cancel


Epic
Review
Pt Research Studies
Patient Station
Patient Lists
Appts
Telephone Call
Encounter
Resources
Hospital Account Maintenance
Web Suite Admin
Patient Group - MGH 12-345 ASTRAZENECA [9992021]
Patient Group
MGH 12-345 A...
Provider Group
ROI Group
User Report
Group Report
Group name: MGH 12-345 ASTRAZENECA
Display name: MGH 12-345 AstraZeneca
Aliases:
General
Tags
Patients
Patient
1 Research,Ryan [7261694]
2 Williams,Gwendolyn [70032
Showing rows for patient Research,Ryan [7261694]
From
To
Restr?
Type
Comment
1 1/6/2017 3/7/2017
2
Remove Patient
Add Patient
Accept
Cancel

Once the CRC releases records, the monitor will see the records in Physician Gateway under **Pt Lists**



Monitors can select specific **Encounters** to view encounter reports. They will find links to any flowsheets used during an encounter embedded within the Enounter report.

Monitor Support

When should I place a New Account Request?

- A New Account Request should only be placed for a NEW monitor who has never had an account before. All changes to a monitor's account, including name change, job change, email address change, adding or deleting patient groups, are handled through helpdesk tickets (see below).
- Note: study staff do not need to log in to Physician Gateway to submit a request
- Monitors should never submit New Account Requests

When should I place a helpdesk ticket?

- For any research issue, helpdesk tickets should be placed to the 'Research – PeC' assignment group
- A helpdesk ticket should be placed if a monitor already has a Physician Gateway account and needs to be linked to your patient group.
- A helpdesk ticket should be placed to troubleshoot any operational and workflow issues a monitor may encounter while using Physician Gateway, including login issues and forgotten or expired password resets (see below).
- A helpdesk ticket should be placed to have a monitor removed from a patient group or to have a monitor account deactivated.
- **CRCs must place helpdesk tickets, not monitors. Monitors should never open their own tickets.**
- All monitor tickets should be MEDIUM or LOW Priority. HIGH Priority is reserved for patient care issues.
- Helpdesk tickets should include:
    - Monitor name
    - Monitor mobile phone number
    - Protocol number and sponsor company name
    - CRC callback number

Monitor Passwords

- Once the monitor has completed their account by setting up their own password, they must use Forgot Password to reset their own forgotten or expired passwords. PeC does not reset monitor passwords.
- The CRC must have the monitor confirm successful log in or report any problems well ahead of the visit. Failure to do so will jeopardize monitor access to the EMR during the visit.

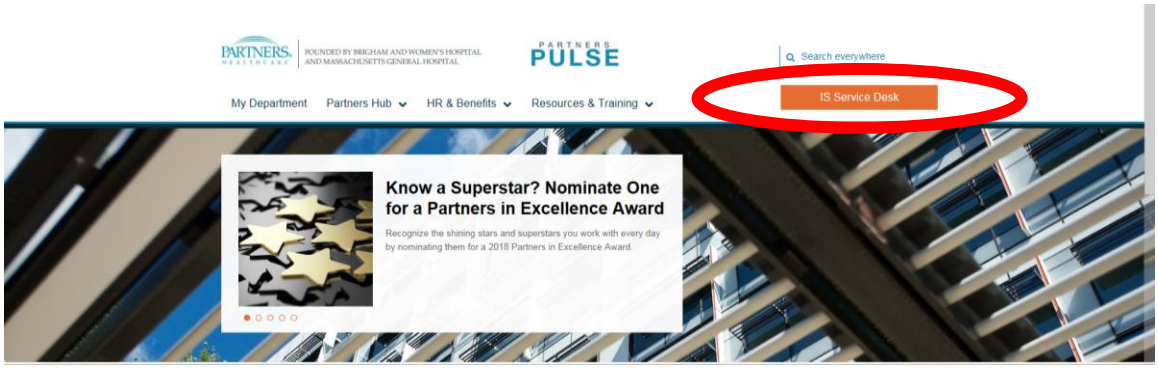
Placing a Ticket to Research-PeC

The Research-PeC team is a small team of analysts responsible for all Epic Research build, implementation and support across all Partners sites. The team uses Service Now to manage support requests, but is not part of the help desk. The team works M-F business hours. There is no 24/7 or off hour/weekend/holiday support for monitor issues.

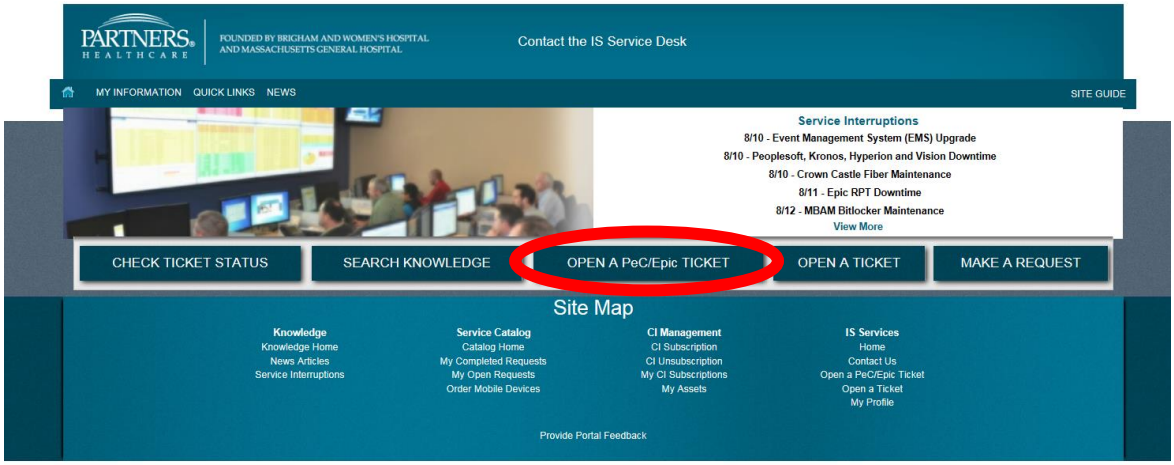
All monitor tickets are processed per the turnaround timeline below, even if the monitor is on site and the visit is underway. Requests and tickets submitted on weekends/holidays, or after business hours will be considered received on the next business day.

Received	Earliest completed
New Request (4+ business days)	
Monday	Friday
Tuesday	Monday
Wednesday	Tuesday
Thursday	Wednesday
Friday	Thursday
Helpdesk Tickets (3+ business days)	
Monday	Thursday
Tuesday	Friday
Wednesday	Monday
Thursday	Tuesday
Friday	Wednesday

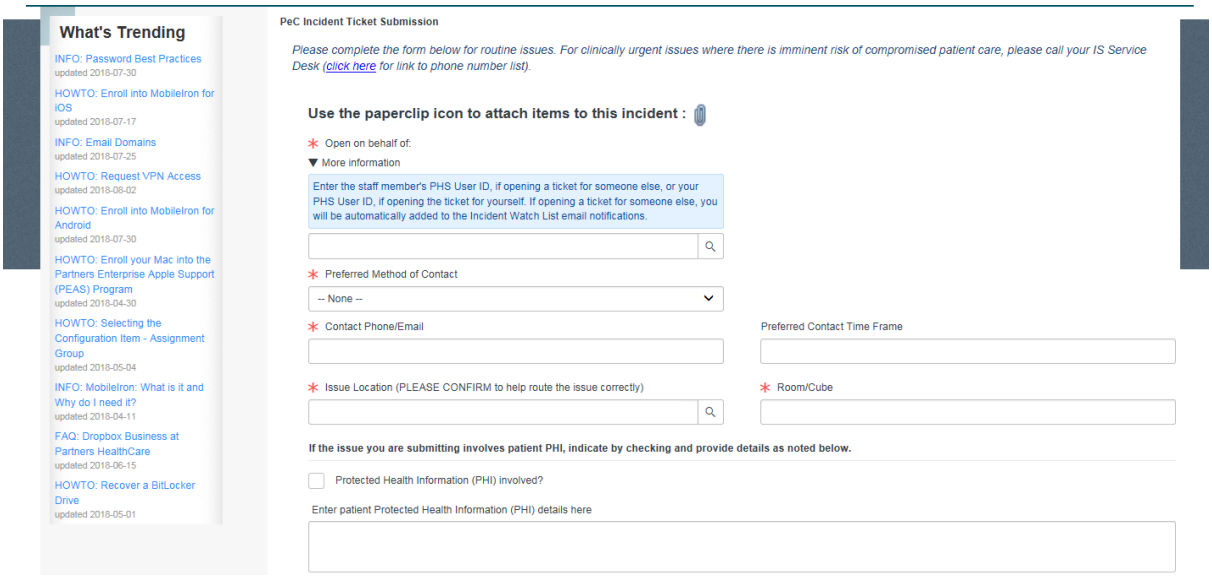
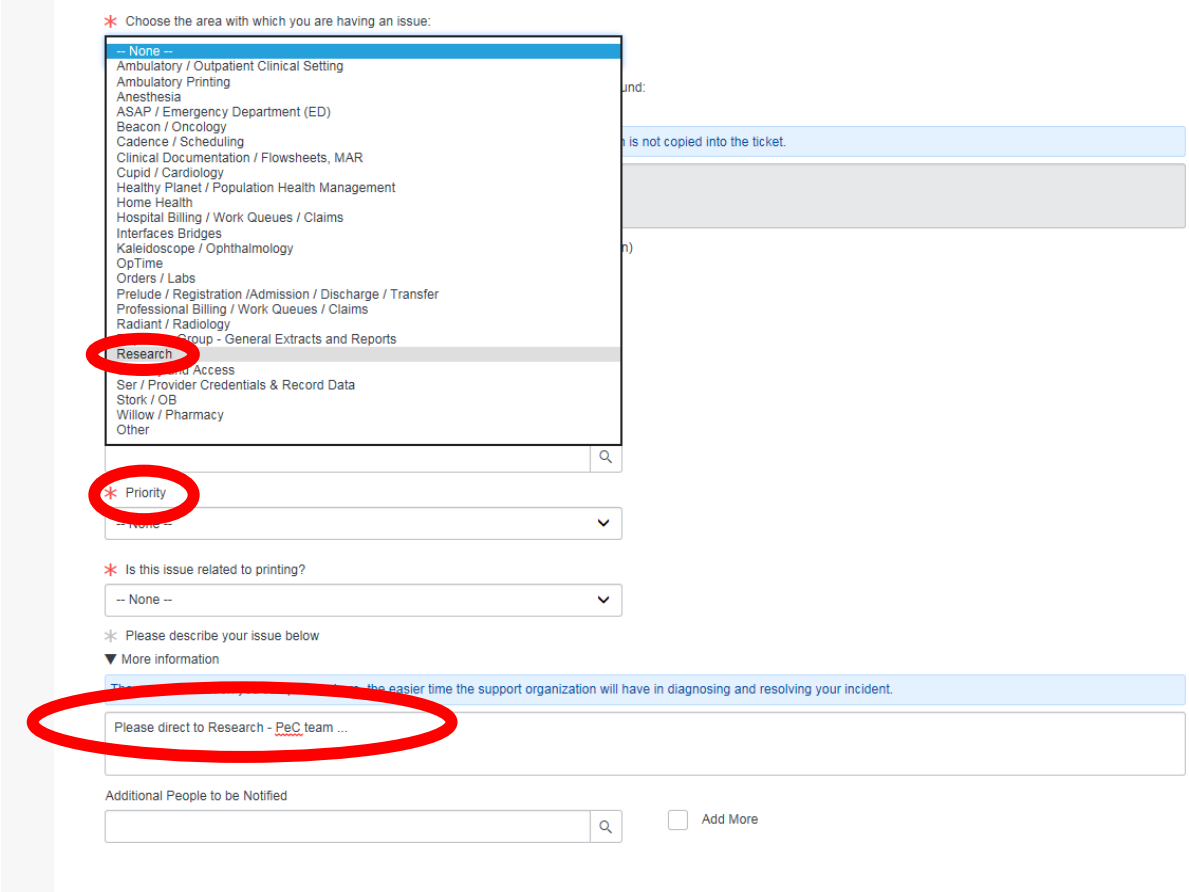
Go to https://pulse.partners.org. Choose IS Service Desk



Choose OPEN A PeC/Epic TICKET



Fill in your information in the required fields. Include a phone number for contact.



Choose Research from drop down menu. Set Priority as Moderate or Low. Monitor tickets are not patient care related and should never be higher than Moderate. Begin description with "Please direct to the Research – PeC Team …"