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Stritch School of Medicine

Loyola University Chicago  
Stritch School of Medicine

## SOP for Obtaining EPIC access for external (non Loyola staff) Research Monitors

**Purpose:** During the conduct of monitoring research projects, non Loyola employees may need access to source documentation located in a patient's electronic medical record in EPIC. The purpose of access to the medical record of subjects enrolled in research is to verify adherence to study protocol as well as data entered in the case report form.

The process for obtaining EPIC Access for research monitors is outlined below. It is important to remember that once obtained, EPIC access does not expire and *is not* study specific. **It is the responsibility of the Research Coordinator and/or PI to terminate the EPIC account once the Monitor will no longer be conducting site visits.**

In order to obtain EPIC access the Research Coordinator or PI will need to follow these steps;

1. **Create EPIC user Account** (*at least one week prior to date ID is needed*); Information Technologies (IT, currently Sheila Popovich) will establish the EPIC user account. Please email the following information to IT (Sheila Popovich) @ [spopovi@lumc.edu](mailto:spopovi@lumc.edu) ;
  - **Subject Line:** "Research Monitor Registry"
  - **Text of the email should include the following information;**  
Study LU#, Name of research monitor, research monitor's Employer Name and Phone number and the date EPIC access is needed

An **Epic Username and password** will be assigned to the research monitor and sent to the Research Coordinator by IT.

2. **EPIC Self-Training for Study Monitor;** Along with the EPIC ID the IT staff will provide a self study training manual to be used by the research monitor. The research monitor should allow approximately 2 hours to review the EPIC training materials prior to using EPIC for the first time. Questions about EPIC may be directed to Ari Anderson at extension 68373, Karen Roeckner at extension 64538, or Sheila Popovich at extension 66158.

If a research monitor does not remember their username and password, call the **Help Desk** for assistance at extension **62160**. (*Keep in mind that a research monitor does not have a Loyola UVID, however, the Help Desk can locate them in Epic by the providing their First and Last Name. Research monitors are assigned a Login ID that begins with the letter "N".*)

3. **Monitor Visit Conclusion Notification;** At the conclusion of the monitoring visit, send an email notification to IT, (Sheila Popovich at [spopovi@lumc.edu](mailto:spopovi@lumc.edu)) noting the dates of the current visit. An audit trail will be generated which will be sent to the Research Coordinator / PI. It is the responsibility of the Research Coordinator / PI to verify that only authorized medical records were accessed. If the audit trail indicates that the research monitor has entered medical records other than those authorized for the study please notify Elaine Fluder, Director, Research Compliance and Safety.

4. **Termination of EPIC Account;** Once the research monitor will no longer be conducting site visits the Research Coordinator and/or PI must terminate the EPIC account by sending an email to IT, Sheila Popovich ([spopovi@lumc.edu](mailto:spopovi@lumc.edu));

- **Subject Line:** “Research Monitor Registry Termination”
- **Text of the email should include the following information;**
  - Study LU#
  - Name of Study Monitor
  - EPIC ID