**F&MCW Epic Recruitment Tools Request Form**

**Not every study may qualify or benefit from EPIC recruitment development. Study teams are NOT permitted to use the following Epic resources for study recruitment purposes unless they have IRB approval to do so. Requests are entered into the MCW PRO SmartForm in eBridge, under Section 17.2 Epic Tools. Please upload this completed form under section 52.0.**

**Use of Epic Recruitment tools requires a study specific RSH (Research) record to be built into Epic. RSH records are built at the time of OCRICC approval. If you are unsure whether your project’s RSH was built, please contact the OCRICC Nurse Consultant assigned to your project. If your project has not yet been submitted to OCRICC for review and approval, this step will need to be completed before the MyChart Recruitment or BPA/RWB builds can be completed.**

**Please contact Jen Brown (**[**jlbrown@mcw.edu**](mailto:jlbrown@mcw.edu)**) in the MCW Office of Research with any questions regarding use of Epic Tools for research recruitment.**

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| --- | --- |
| PRO # (eBridge) |  |
| Full Protocol Title |  |
| Protocol No (OnCore) |  |
| Protocol Short Title (OnCore) |  |
| Study Title in EPIC |  |
| Principal Investigator |  |
| Study Contact |  |

1. **MyChart Recruitment Tool** **Request N/A**

*The MyChart Recruitment tool allows study teams to access a report of Froedtert patients who have expressed interest in research participation via their MyChart account. The report can be filtered by patient age, gender, and preferred areas of interest. Study staff assigned to the study via OnCore/Epic can then send a study-specific recruitment message via MyChart to individual patients to see if they are interested.*

**Enter a brief patient-facing study description below (blue text required**):

The Medical College of Wisconsin is conducting a study to understand [….]

The information we collect will help us to [….]

If you respond that you are interested in learning more, our study staff will contact you to discuss the study with you in detail and answer any questions you many have. At that time, you can decide whether you would like to participate.

Want to adjust the research messages you receive? You can adjust your preferences for future communications regarding research opportunities in MyChart. To update your preferences, navigate to the main menu and select “Research Studies.”

1. **Reporting Workbench Report (RWB) Request/ Best Practice Alert (BPA) N/A**

*BPAs can help notify you of patients who meet study enrollment criteria which exist as discrete data fields in EPIC [i.e., Male patients under age 60 with Type 2 Diabetes who may be inpatient]. Reporting Workbench reports may also be created and customized to your study to find potential patients. The Froedtert Epic Team will determine the appropriate tool for your study recruitment based on the search criteria provided below:*

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| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |
| 5. |  |
| 6. |  |

**Please identify the names of all Epic users who will require access to the RWB report. Note: all individuals must be listed as members of the study team on the MCW PRO SmartForm in eBridge in order to receive access.**