Process for Obtaining Research Access to LifeChart

IMPORTANT PRINCIPLES:

1. ALL individuals (whether employees, or non-employees) are to have only ONE Lifespan login ID, ONE NetLearning account, and ONE Epic/LifeChart ID. If an individual has more than one such credential, the process described below will occur more slowly because the duplicate IDs will need to be sorted out prior to setting up access.

2. All research individuals, whether employees or non-employees, should have a Lifespan email address and NetLearning account so that Research Principal Trainer, has a way to contact him/her, and can assign the curriculum appropriately.

3. ALL research-access requests must be approved by Dan Bryant, Director Lifespan Research Operations, (by the process described below) prior to taking any Research eLearnings or classes.

The process for obtaining Research access in LifeChart is as follows.

1. A Service request must be submitted for the individual(s) – if available, make Dan Bryant, Director Lifespan Research Operations, the approver. Indicate what type of Research access he/she is requesting in Epic/LifeChart (Research Read-Only* access, Research Enrollment Assistant access, **, Research Coordinator*** access, or Research Nurse Coordinator **** access). Subsequently, the Research Principal Trainer will receive the ticket, and assign the appropriate curriculum.

[Tip sheet for using the System Access Request is available here](#)

2. If Dan Bryant, Director Lifespan Research Operations, is not the approver, the Research Principal Trainer, will send Mr. Bryant a copy of the ticket for approval, after which, the Research Principal Trainer will assign the appropriate curriculum.

Once the individual has been approved the following occurs:

Curriculum will be assigned for the individual based on the type of access he/she is approved for:

A. For the **Research Read Only access***, the individual(s) needs to complete four required e-learnings and a quiz, all of which will be assigned to the individual's NetLearning account. An email will be sent to the individual at his/her Lifespan email, to let him/her know that the curriculum has been assigned, and that he/she needs to complete and let me know.

*Read Only access allows the user to read the medical record, but not document in the record itself. Once he/she has completed those e-learnings, please email the Research Principal Trainer, A notice is not sent when the eLearnings and quiz are completed. The Research Principal Trainer will then submit him/her for LifeChart access with the read only access and send the individual an email to let him/her know.

B. For the **Research Enrollment Assistant access, **,** the individual(s) need to complete the curriculum for Research Read Only access as a **_pre-requisite_**, and attend one *in person* class (all curriculum must be assigned)

REA100 Research Enrollment Assistant

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** Research Enrollment Assistant access provides the same Medical Record access as a Read Only user, but also enables the employee to enroll patients in a study and to view shared notes and notes awaiting co-sign.

C. For the **Research Coordinator access*****, the individual(s) need to complete the following *in person* classes: (curriculum must be assigned)

RCH100 Research Coordinator

HB140 Research Biller

***Research Coordinator access allows the user to associate patients, appointments, and orders to studies, place orders and route them to appropriate individuals to be signed, and review billing. After he/she has completed all the in-person classes, he/she needs to email the Research Principal Trainer. A notice is not sent when the individual completes all the classes. The Research Principal Trainer will then submit him/her for Research Coordinator access and send the individual an email to let him/her know.

D. For the **Research Nurse Coordinator access******, the individual(s) need to complete the following *in person* classes: (curriculum must be assigned)

Ambulatory Nursing & Clinical Support

RCH100 Research Coordinator

HB140 Research Biller (not required for Oncology Research Nurse)

****Research Coordinator Nurse access allows the user to associate patients, appointments, and orders to studies, place orders and route them to appropriate individuals to be signed, and review billing. In addition, he/she will be able to perform Nursing functions in LifeChart. After he/she has completed all four in person classes, he/she needs to email the Research Principal Trainer. A notice is not sent when the individual completes all the classes. The Research Principal Trainer will then submit him/her for Research Coordinator Nurse access and send the individual an email to let him/her know.