

UTILIZING CRC CLINICAL SERVICES

CLINICAL RESEARCH CENTER

University of Nebraska Medical Center



Revised:

September 2024

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REQUESTING SERVICES

PROCESS

All clinical service requests must go through the process outlined below to be considered.

1. Request services via the CRC [Study Intake Form](#).
 - a. If not originally requested on Study Intake Form, please complete [Teams Intake Survey](#).
2. CRC Clinical Trials Analyst (CTA) receives the initial intake request.
3. Requests for clinical services are sent to the Clinical Intake Team by CTA.
4. The Clinical Intake Team reviews the request for clinical services at a Clinical Intake Meeting and provides recommendations to leadership.
5. The CRC Leadership Team reviews the study.
6. The CRC Clinical Intake Team will reach out to the study contact to coordinate a meeting between CRC clinical staff and the study team to discuss workflows if the request is deemed feasible.

Clinical Intake Meetings

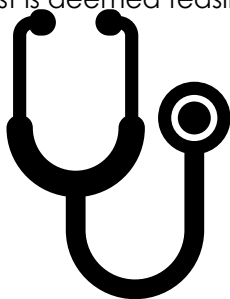
- Occur every other Friday afternoon to discuss all request received in the previous two weeks.

Considerations and Concerns

- Patient safety
- Requested services
- Timing and frequency of visits
- Number of expected subjects
- Expected start-up timeline
- CRC staff members required

Clinic Tours

- Reach out to Serena Gaines (serena.gaines@unmc.edu) to find a time for clinic tour. Once a time has been agreed on, please send a calendar invite to crcclinic@unmc.edu, serena.gaines@unmc.edu, and crcresearchassistants@unmc.edu.



PREPARING FOR YOUR APPOINTMENT

EPIC ONE CHART

See Appendix A research order information.

Research encounters and orders must be linked to research prior to the scheduled appointment. View One Chart tip sheets in [Service Now](#) via search bar.

Non-CRC staff should not document in the CRC Clinic encounter. If documentation needs to occur in EPIC, a separate encounter needs to be created.

All orders must be placed prior to research subjects being seen in clinic. These may be placed under the CRC Clinic appointment. A tip sheet can be found in Appendix B for creating research encounters and Appendix C and D for CRC ECG orders.



SCHEDULING AN APPOINTMENT

Appointments should be scheduled a minimum of three days prior to the appointment date. This ensures staff and dry ice (if applicable) will be available. CRC Scheduling Instructions can be found in Appendix E. Additional tips can be found in Appendix F.

GENERAL

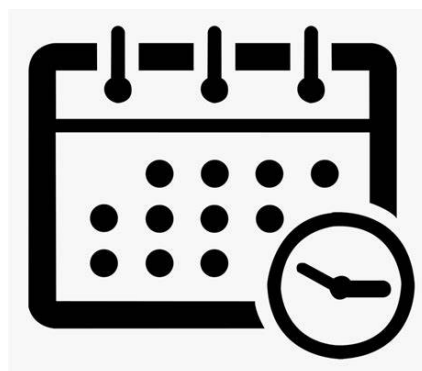
Coordinators should create source documents for the CRC staff on which to write relevant information from the CRC clinic portion of the visit, such as draw times, vitals readings, or notes. CRC staff will return the document to the coordinator upon the coordinator's request.

Coordinators are expected to bring all materials including kits, shippers, requisition forms, source documents, and other relevant materials to the CRC on the day of the visit. The CRC does not store these materials for outside departments as CRC storage is used for the CRC supplies.

DURING AND AFTER YOUR APPOINTMENT

DURING APPOINTMENT

- Coordinators and subjects are expected to check in at the front desk.
- If a coordinator or subject is going to be late to an appointment, please call 402-559-7685 as soon as possible.
- Only CRC staff will perform clinical services (e.g., phlebotomy) in CRC CRU space unless other prior arrangements have been made and approved by CRC leadership.
 - Coordinators must complete the applicable CRC Competency Checklist prior to the subject's first appointment if performing clinical services.
- Coordinator must be available during the appointment for any questions or emergencies that may arise.



AFTER APPOINTMENT

- CRC CRAs will keep electronic copies of shipping documents and send them to coordinator on request.
- Coordinator should clean up any space and equipment used after each subject. This includes throwing away the exam table paper, putting pillowcases in the laundry returning all furniture and materials back to where they were found, and wiping down all touchable surfaces (including vital signs equipment and pillows) and the exam table with the gray-top alcohol wipes found in each room. Additionally, coordinators are responsible for terminal cleaning if a participant is infected and considered contagious in any way.
 - Please let a CRC staff member know if supplies are running low in the room.
- Coordinators and subjects are expected to check out at the front desk.

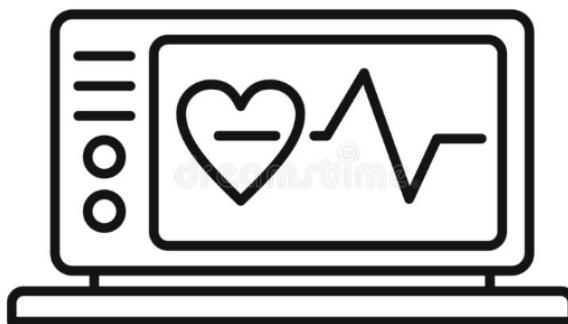
ADDITIONAL INFORMATION

CLINIC EQUIPMENT

- Annual calibration records for all CRC clinic equipment can be found in [Sodexo](#). Navigate to Device Info -> Advanced Search -> Department Name + Contains -> Clinical Research Center.
- Temperature logs for CRC refrigerator and -20 C freezer, and the certificate of conformance for the -80 C freezer can be requested by emailing CRCResearchAssistants@unmc.edu.

OTHER

- Space is available for non-CRC staff and coordinators to sit or work on paperwork in Clinic Room 8. Please only utilize this space while you have research subjects in clinic.
- Clinical Research Center Standard Operating Procedures can be found [here](#). CO31, CO33, and CO50 should be reviewed.
- When emailing the Research Assistants, please always use the CRCResearchAssistants@unmc.edu email, not individual emails. This will ensure your email is reviewed in a timely manner.
- When emailing the CRC Research Nurses, please always use the CRCResearchNurses@unmc.edu email, not individual emails. This will ensure your email is reviewed in a timely manner.



REVIEW CONFIRMATION

BY SIGNING...

- *I acknowledge that I have received a copy of the Utilizing CRC Clinical Services packet, which describes valuable information about using CRC clinical services.*
- *I confirm that I have reviewed the Utilizing CRC Clinical Services packet and will abide by the rules, SOPs, and policies of the department when using CRC services.*

	PRINT	SIGN	DATE
Coordinator			

Appendix A - How to Place Research Orders for the CRC in EPIC/OneChart

Associate your subject with the study:

1. In EPIC, click on "Pt Research Enrollment" along the top of the screen. If it is not there, click the wrench icon in the top right corner to add this option to the toolbar.
2. Type the patient's name/MRN and click "Accept" once you have selected the correct patient using two patient identifiers.
3. In the box that reads "Add study", type the IRB number and the study should show up. Click "Add".
4. Fill in the participant details and click "Accept". A research icon should appear to the right of the patient's name, indicating that they are involved in a research study.
 - a. Note: You may need to select "Screening" as the current status prior to the screening visit to associate screening visit orders with research and see the research icon.
5. The patient has now been associated with the study and orders can now be placed.

Place study-specific orders prior to the appointment:

1. Click on the "EPIC" dropdown menu in the top left corner of your screen and select "Encounter".
 - a. If that option is not there, click "Modify this Menu" under the "EPIC" dropdown menu and add the "Encounter" option, then retry.
2. Type in the subject's name/MRN and click accept.
3. Select "New". For encounter type, click "Orders Only". Change the provider to the PI and select the appropriate department. Click "Accept".
4. In the bottom left corner of the screen, click "ADD ORDER", then type the name of the order and hit enter.
 - a. Note: Central labs should be ordered as "Collection for blood- research only" and/or "collection for non-blood- research only". Local labs can be ordered as normal; just make sure they are linked to research. ECGs done in the CRC should be ordered as "ECG- Only for CRC, IMAGI, UHC".
5. A list of options should appear. Be sure to select the appropriate option. If ordering multiple items, hit "Select and Stay", and the order will move to the right-hand column. Once all orders have been entered, click "Accept".
6. A new pop-up should appear asking for more details. Select "Future" as the status and choose the expected date for the order to be completed. For indication, always select "Other" and type "Research". Add the study information and your contact information under "Comments".
 - a. Note: ECGs are always to be read by "Academic Physician". Always leave "Auto Release Standard" as selected, and don't adjust the "Class" option unless necessary. When the information has been filled in, click "Accept". Do this for all orders placed.
7. Next, Select "Dx Association". Type in the diagnosis number "Z00.6" (research) and select the most appropriate description.
8. Click the diamond beneath the diagnosis and check the boxes next to all the orders placed. Click "Accept".
9. Now click on the triangle next to "Options" and click "Research Association". A box will pop up with the name of the study and the orders placed. Check the box next to each order associated with this specific study. If the study name is not there, then you need to first associate the patient with the study (see above). Click "Accept."

How to Place Research Orders for the CRC in EPIC/OneChart

10. Now select “SIGN ORDERS” or “PEND”, depending on your abilities within EPIC. Make sure that the PI reviews and signs the orders prior to the appointment.

Helpful Hints:

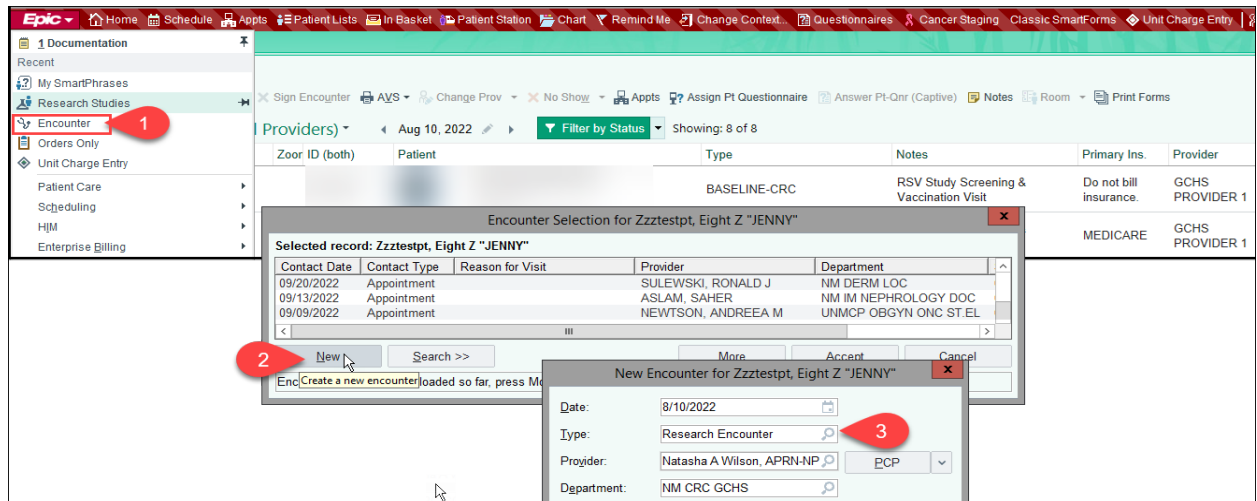
- If you are ever unable to find an option in a toolbar, type the name of the desired option into the search bar underneath the patient’s name. DO NOT hit enter. Instead, select the option that appears under “Jump To”, and it will take you to that page.
- Practice enrolling patients in research studies and placing orders in “Test Patient” charts in EPIC. Below is a list of test patients that can be used for practice:

ZZZTESTPT,EIGHT Z	00989998
ZZZTESTPT,FIVE B	00989995
ZZZTESTPT,FOUR M	00989994
ZZZTESTPT,NINE A	00989999
ZZZTESTPT,ONE J IV	00989991
ZZZTESTPT,SEVEN Y	00989997
ZZZTESTPT,SIX ANN	00989996
ZZZTESTPT,THREE L	00989993
ZZZTESTPT,TWO D	00989992
ZZZTESTPT,ZERO S	00989990

- Once you have placed a specific order multiple times, it should show up with a lightbulb next to it when you search for that order. This makes it easier to know which to select if there are multiple options in EPIC for one specific order.
- For more tip sheets and EPIC resources, go to <https://updates.nebraskamed.com/onechart/> and look under “Training” for your specific needs. You can also type “Research” into the search bar.
- You can email OneChartResearch@nebraskamed.com with any questions or requests.

Appendix B - How to Create a Research Encounter in EPIC/OneChart

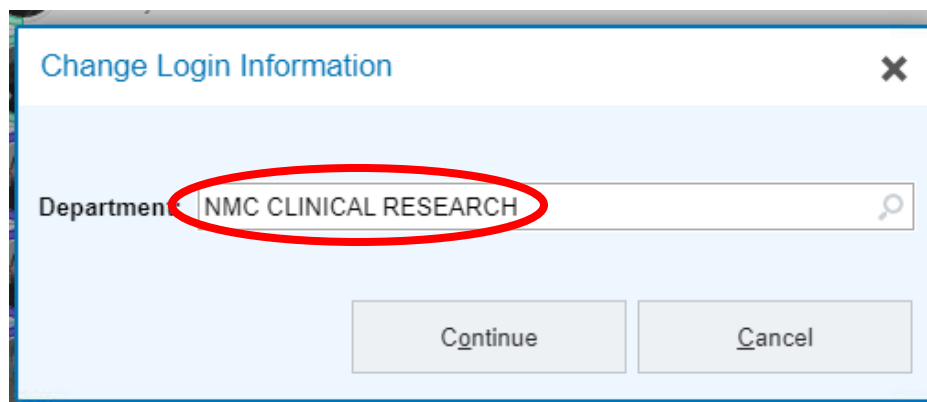
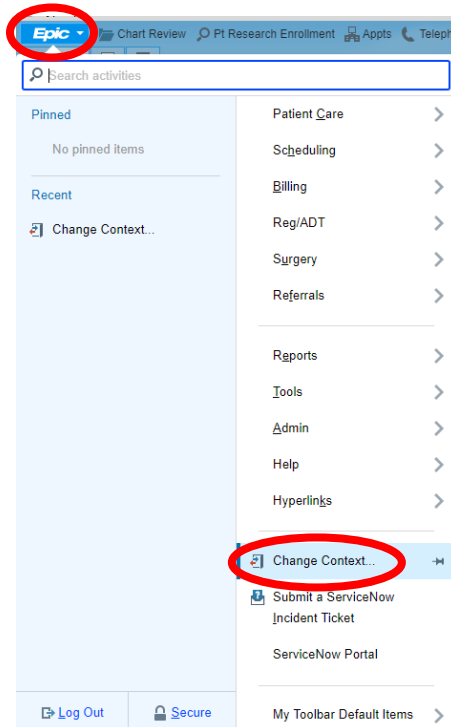
1. Click on the “EPIC” dropdown menu in the top left corner of your screen and select “Encounter”.
 - a. If that option is not there, click “Modify this Menu” under the “EPIC” dropdown menu and add the “Encounter” option, then retry.
2. Type in the subject’s name/MRN and click accept. Then select “New”. For the type of encounter, click “Research Encounter”. Change the provider to the PI and select the appropriate department. Click “Accept.”
3. Now you may document any study visit assessments, vital signs, and notes within this encounter. You may also order study procedures or medications and mark study drugs as administered within the MAR tab.

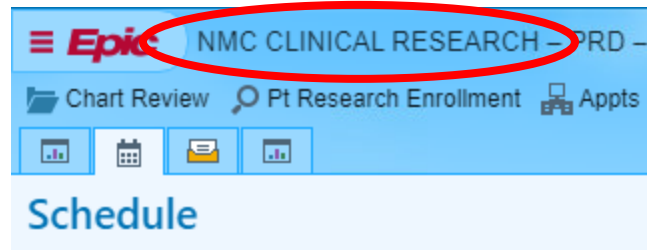


4. Prior to signing the visit or ordering any study interventions, add a research diagnosis. In the bottom left toolbar, click “Add Diagnosis” and type in “Z00.6”. These are all research diagnoses- you may select the most appropriate description for the diagnosis.
5. Once all documentation for the visit has been completed within the encounter, you may hit “Sign Encounter”. EPIC will not let you sign off if there is anything left incomplete (i.e., no diagnosis code entered).
6. If you must add something into the encounter later, you may double click on the patient’s EPIC encounter and select the “Addend Encounter” option.

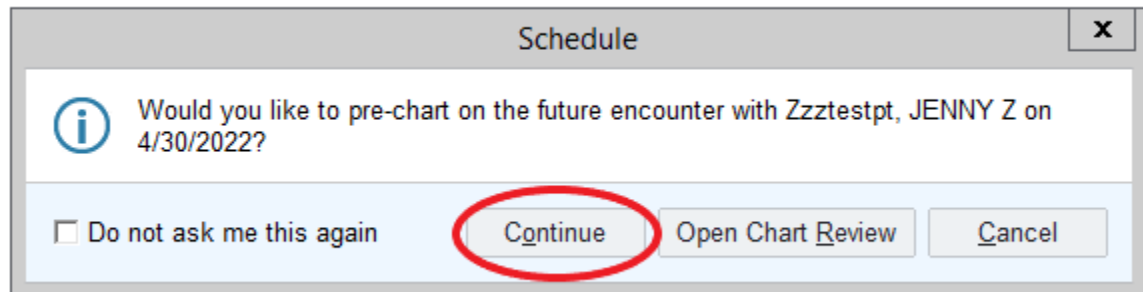
Appendix C - CRC ECG Orders for Local Machine

1. Once you have received confirmation from the CRC Clinic that your appointment has been scheduled, open EPIC.
2. You must **change your context** in EPIC to NMC Clinical Research by clicking on the EPIC dropdown menu in the top left, clicking "Change Context," then searching "NMC Clinical Research" in the search bar. Click Continue. You will know you've successfully changed your context when the top bar of your EPIC window says "NMC CLINICAL RESEARCH."

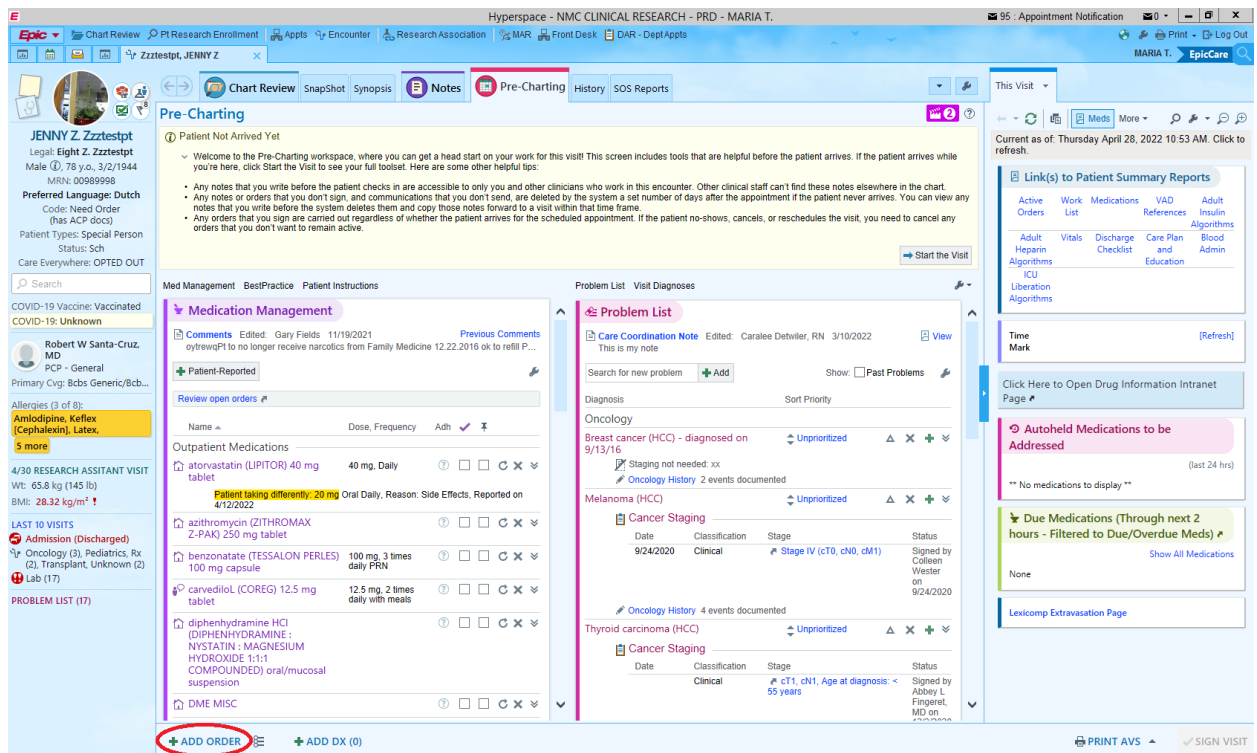




3. Double click on your participant's name and select "Continue" when prompted.



4. Select "Add Order"



5. Type "ECG" and select the option that says "ECG – Only for CRC, IMAGI, UHC"

The screenshot displays the EpicCare interface for a patient named JENNY Z. Zzztestpt. The patient's information, including legal name, date of birth (3/2/1944), MRN (00989998), and preferred language (Dutch), is shown on the left. The patient is currently in the 'ECG' search results pane, which lists several options under 'Outpatient Procedures'. The option 'ECG - Only for CRC, IMAGI, UHC' is highlighted and circled in red. Below this, there are four other options: 'ECG - Only for CRC, IMAGI, UHC', 'Diagnostic center - electrocardiogram', 'Electrocardiogram - Externally Performed', and 'Electrocardiogram clinic'. The right-hand pane shows various navigation links and a 'Summary Reports' section. The bottom of the screen features a search bar with 'ECG' entered and a '+ ADD DX (0)' button.

Name	Frequ...	Pref List	Type	Px Code	Resulting Agencies
ECG - Only for CRC, IMAGI, UHC		THUROW...	ECG	ECG60	
ECG - Only for CRC, IMAGI, UHC		CRC PROC...	ECG	ECG60	
Diagnostic center - electrocardiogram		CRC PROCE...	ECG	ECG9	
Electrocardiogram - Externally Performed		CRC PROCE...	ECG	ECG8	
Electrocardiogram clinic		CRC PROCE...	ECG	ECG8	

6. Change the:

- Status of the order to - "Future"
- Reason for exam to - "Other" (include IRB number in comment section)
- EKG to be ready by to - "Academic Physician"
- Class to - "Clinic Performed"

Click "Accept" when finished

ECG - Only for CRC, IMAGI, UHC

Status: Normal Standing **Future**

Expected Date: 4/28/2022 1 Week 2 Weeks 1 Month 3 Months 6 Months 1 Year ☐ Approx.

Expires: 4/28/2023 1 Month 2 Months 3 Months

Reason for exam: **Other, please specify** Bradycardia Tachycardia Chest Pain Irregular Heartbeat

EKG to be read by: **Academic Physician** Private Physician

Pt. Portal result release timeframe: **Auto Release Standard** Immediate 7 Days Manual release only

Sched Inst.: + Add Scheduling Instructions

Comments: **ECG for IRB 123-45**

Class: Clinic Perfo Ancillary Performed Hospital Performed **Clinic Performed**

Modifiers:

Show Additional Order Details

Next Required

Accept Cancel

7. Click "DX Association"

Signature by Chloee

Show All Medications

Dx Association Edit Multiple Options

Select order mode

Outpatient

ECG - Only for CRC, IMAGI, UHC

Routine, Expected: 4/28/2022, Expires: 4/28/2023, Clinic Performed

OPTUMRX MAIL SERVICE - Carlsbad, CA - 2858 Loker Ave East, Suite 100

800-791-7658

PRINT AVS PEND SIGN ORDERS (1)

8. Type "Research"

Associate Diagnoses

Zzztestpt, JENNY Z

research + Add Common Previous Problems

Add a diagnosis to get started

⚠ ECG - Only for CRC, IMAGI, UHC

All Clear

✓ Accept ✗ Cancel

9. Select any of the options with code "Z00.6" and click accept

Diagnoses Search - ZZZTESTPT,EIGHT Z

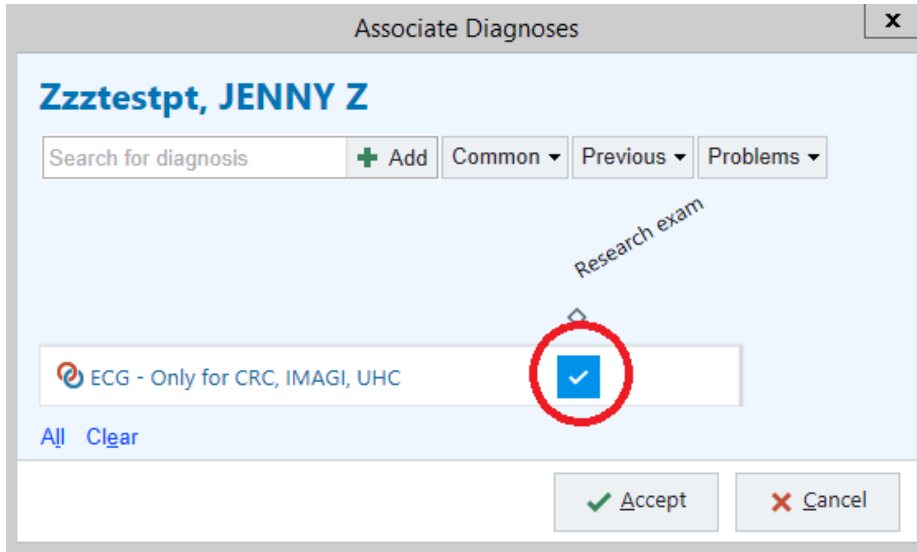
research

Browse Preference List Database

External ID	Name	Code	Code Set
725937	Research exam	Z00.6	ICD-10-CM
366592	Research requested antenatal ultrasound scan	Z36.9	ICD-10-CM
366593	Research requested ultrasound scan, antenatal	Z36.9	ICD-10-CM
745873	Research study patient	Z00.6	ICD-10-CM
745689	Research subject	Z00.6	ICD-10-CM
721064	Exam for clinical research	Z00.6	ICD-10-CM
247621	Examination for normal comparison for clinical research	Z00.6	ICD-10-CM
188074	Examination for normal comparison or control in clinical research	Z00.6	ICD-10-CM
290173	Examination of participant or control in clinical research	Z00.6	ICD-10-CM
1618995	Encounter for examination for normal comparison and control in clinical research program	Z00.6	ICD-10-CM
692668	Encounter for examination for normal comparison or control in clinical research program	Z00.6	ICD-10-CM
773946	Encounter for examination of normal volunteer in research study	Z00.6	ICD-10-CM
717430	History of venereal disease research laboratory	Z92.89	ICD-10-CM
1822621	Medical Research Council Breathlessness Scale grade 1 dyspnea	R06.00	ICD-10-CM
1822614	Medical Research Council Breathlessness Scale grade 2 dyspnea	R06.00	ICD-10-CM
1822615	Medical Research Council Breathlessness Scale grade 3 dyspnea	R06.00	ICD-10-CM
1822616	Medical Research Council Breathlessness Scale grade 4 dyspnea	R06.00	ICD-10-CM
1822617	Medical Research Council Breathlessness Scale grade 5 dyspnea	R06.00	ICD-10-CM
1822569	Modified Medical Research Council (mMRC) Dyspnea Scale grade 0 dyspnea	R06.00	ICD-10-CM
1822563	Modified Medical Research Council (mMRC) Dyspnea Scale grade 1 dyspnea	R06.00	ICD-10-CM
1822567	Modified Medical Research Council (mMRC) Dyspnea Scale grade 2 dyspnea	R06.00	ICD-10-CM
1822571	Modified Medical Research Council (mMRC) Dyspnea Scale grade 3 dyspnea	R06.00	ICD-10-CM

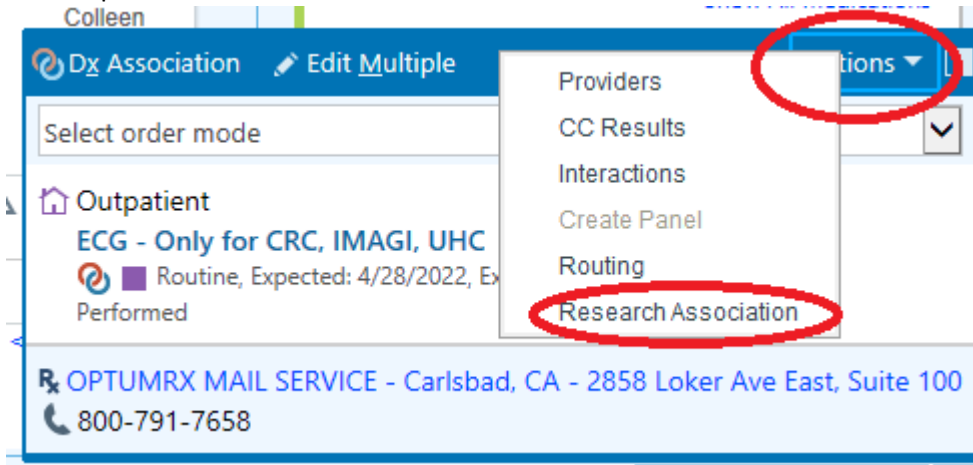
✓ Accept ✗ Cancel

10. Associate the ECG order with the research diagnosis you selected in the previous step and click accept.



The "Associate Diagnoses" dialog box for patient Zzztestpt, JENNY Z. It features a search bar, a "+ Add" button, and dropdown menus for "Common", "Previous", and "Problems". A "Research exam" label is positioned above a list of diagnoses. The diagnosis "ECG - Only for CRC, IMAGI, UHC" is selected, indicated by a blue checkmark in a box that is circled in red. At the bottom, there are "Accept" and "Cancel" buttons.

11. Click "Options" and select "Research Association"



The "Dx Association" dialog box for patient Colleen. The "Options" dropdown menu is open, showing a list of options: "Providers", "CC Results", "Interactions", "Create Panel", "Routing", and "Research Association". The "Research Association" option is circled in red. The main area of the dialog shows "Outpatient" status, "ECG - Only for CRC, IMAGI, UHC" diagnosis, and "Routine, Expected: 4/28/2022, Expected" status. At the bottom, there is a prescription for "OPTUMRX MAIL SERVICE - Carlsbad, CA - 2858 Loker Ave East, Suite 100" with the phone number "800-791-7658".

12. Select the correct research study and click accept.

Order - Associate Research Studies

RESEARCH TEST STUDY

433-21 Validation of Genomic I...

075-21 Ph3 Rndmzd Dbl-Blind...

766-21 Understanding the Long...

ECG - Only for CRC, IMAGI, UHC ☒ ☐ ☐ ☐

Accept Cancel

13. Ensure that all 3 symbols appear (circled in yellow) and select “sign orders”

Dx Association Edit Multiple Options

Select order mode

Outpatient

ECG - Only for CRC, IMAGI, UHC

Performed

ROUTINE, Expected: 4/28/2022, Expires: 4/28/2023, Clinic

OPTUMRX MAIL SERVICE - Carlsbad, CA - 2858 Loker Ave East, Suite 100

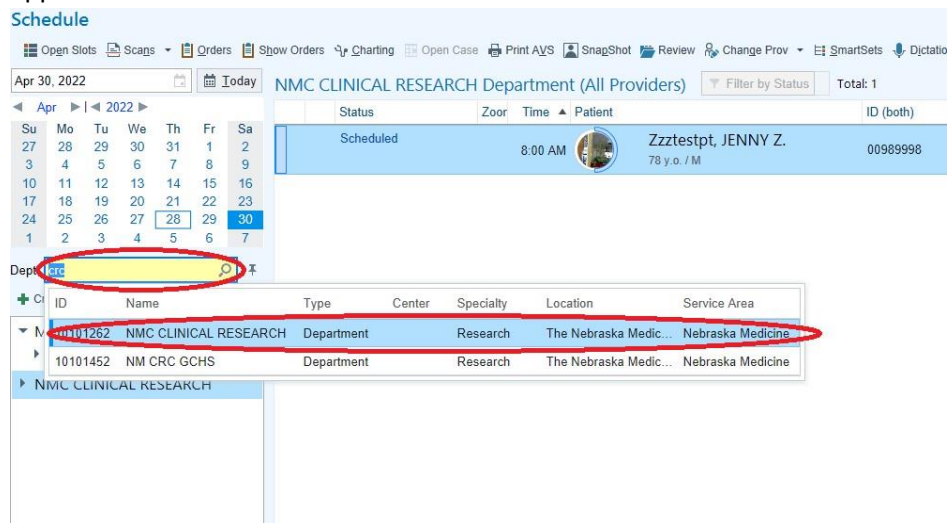
800-791-7658

PRINT AVS PENL SIGN ORDERS (1)

14. Complete the order information by filling in the “order mode” and “ordering provider” sections and click accept when completed.
15. These steps must be completed for **each** ECG that the CRC is performing (ie if you need a triplicate ECG there must be three orders in epic)
16. The day before the first appointment occurs, email the “CRC Research Assistants” or call 402-552-2285 to ensure that the orders were placed correctly. Please reach out if you have any issues.

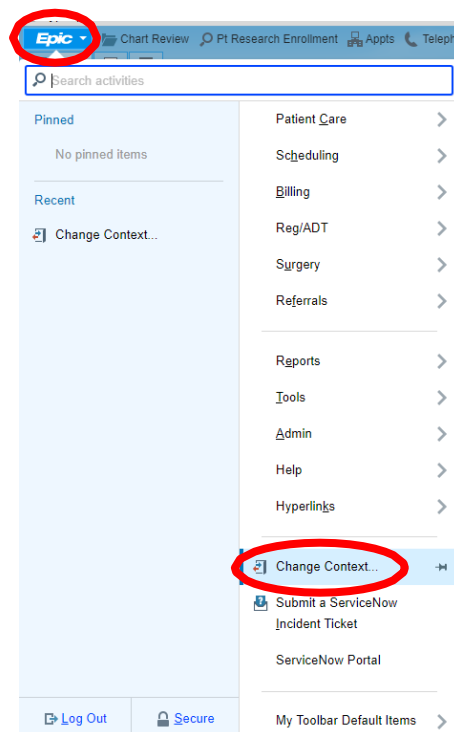
Appendix D - CRC ECG Orders for Sponsor Provided Machines

1. Once you have received confirmation from the CRC Clinic that your appointment has been scheduled, open EPIC.
2. Change department to “NMC Clinical Research Center” and select the date of your upcoming appointment.



OR

You can also change the context in EPIC to NMC Clinical Research by clicking on the EPIC dropdown menu in the top left, clicking “Change Context,” then searching “NMC Clinical Research” in the search bar. Click Continue.



Change Login Information

Department **NMC CLINICAL RESEARCH**

[Continue](#) [Cancel](#)

- Double click on your participant's name and select "Continue" when prompted.

Schedule

Would you like to pre-chart on the future encounter with Zzztestpt, JENNY Z on 4/30/2022?

☐ Do not ask me this again [Continue](#) [Open Chart Review](#) [Cancel](#)

- Select "Add Order"

Hyperspace - NMC CLINICAL RESEARCH - PRD - MARIA T.

95 : Appointment Notification

Print Log Out MARIA T. EpicCare

Chart Review PT Research Enrollment Apts Encounter Research Association MAR Front Desk DAR Dept Apts

Zzztestpt, JENNY Z

Pre-Charting

Patient Not Arrived Yet

Welcome to the Pre-Charting workspace, where you can get a head start on your work for this visit! This screen includes tools that are helpful before the patient arrives. If the patient arrives while you're here, click Start the Visit to see your full toolbar. Here are some other helpful tips:

- Any notes that you write before the patient checks in are accessible to only you and other clinicians who work in this encounter. Other clinical staff can't find these notes elsewhere in the chart.
- Any notes or orders that you don't sign, and communications that you don't send, are deleted by the system a set number of days after the appointment if the patient never arrives. You can view any notes that you write before the system deletes them and copy those notes forward to a visit within that time frame.
- Any orders that you sign are carried out regardless of whether the patient arrives for the scheduled appointment. If the patient no-shows, cancels, or reschedules the visit, you need to cancel any orders that you don't want to remain active.

[Start the Visit](#)

Med Management Best Practice Patient Instructions

Medication Management

Comments Edited: Gary Fields 11/19/2021 Previous Comments
oytweqP1 to no longer receive narcotics from Family Medicine 12.22.2016 ok to refill P...

Review open orders

Outpatient Medications

Name	Dose, Frequency	Adh	✓	✗
atorvastatin (LIPITOR) 40 mg tablet	40 mg, Daily			
Patient taking differently: 20 mg Oral Daily, Reason: Side Effects, Reported on 4/12/2022				
azithromycin (ZITHROMAX) Z-PAK 250 mg tablet				
benzonatate (TESSALON PERLES) 100 mg capsule	100 mg, 3 times daily PRN			
carvedilol (COREG) 12.5 mg tablet	12.5 mg, 2 times daily with meals			
diphenhydramine HCl (DIPHENHYDRAMINE: NYSTATIN : MAGNESIUM HYDROXIDE 1:1:1 COMPOUNDED) oral/mucosal suspension				
DME MISC				

Problem List

Care Coordination Note Edited: Caralee DeWilder, RN 3/10/2022 View
This is my note

Search for new problem [Add](#) Show: ☐ Past Problems

Oncology

Breast cancer (HCC) - diagnosed on 9/13/16 Unprioritized

Staging not needed: xx
Oncology History 2 events documented

Melanoma (HCC)

Cancer Staging

Date	Classification	Stage	Status
9/24/2020	Clinical	Stage IV (cT0, cN0, cM1)	Signed by Colleen Wester on 9/24/2020

Oncology History 4 events documented

Thyroid carcinoma (HCC)

Cancer Staging

Date	Classification	Stage	Status
	Clinical	cT1, cN1, Age at diagnosis: < 55 years	Signed by Abbey L Fingeret, MD on 4/28/2022

Link(s) to Patient Summary Reports

Active Orders Work List Medications VAD References Adult Insulin Algorithms Blood Admin

Adult Nephritis Algorithms Vitals Discharge Checklist Care Plan and Education Blood Admin

ICU Liberation Algorithms

Time Mark [Refresh]

Click Here to Open Drug Information Intranet Page

Autoheld Medications to be Addressed (last 24 hrs)

** No medications to display **

Due Medications (Through next 2 hours - Filtered to Due/Overdue Meds)

None Show All Medications

Lexicomp Extraversion Page

ADD ORDER **ADD DX (0)**

PRINT AVS SIGN VISIT

5. Type "Clinical research center sponsor-supplied machine EKG"

The screenshot shows a medical software interface with a patient profile on the left and an 'Order Search' window in the center. The patient profile for 'JOE V. Zzztestpt' includes demographic information, allergies, and active therapy plans. The 'Order Search' window is set to search for 'EKG' and displays a list of 'Outpatient Procedures'. The selected item is 'Clinical research center sponsor-supplied machine EKG'.

Name	Frequ...	Pref List	Type	P.x Code	Resulting Agencies
ECG - Only for CRC, IMAGL UHC (aka EKG)		CRC PROC...	ECG	ECG60	
Clinical research center sponsor-supplied machine EKG		CRC PROC...	Nursing	NUR1249	
Diagnostic center - electrocardiogram (aka EKG)		CRC PROC...	ECG	ECG9	
Electrocardiogram - Externally Performed (aka EKG)		CRC PROC...	ECG	ECG8	
Electrocardiogram clinic (aka EKG)		CRC PROC...	ECG	ECG8	

The 'Order Search' window also includes tabs for 'Panels', 'Outpatient Medications', and 'Inpatient Orders'. The 'Panels' tab shows 'No results found'. The 'Outpatient Medications' tab also shows 'No results found'. The 'Inpatient Orders' tab is currently selected and shows a list of orders.

Change the:

- Status of the order to - "Future"
- Update the Expected Date and Expiration as appropriate
- Add Scheduling Instructions and Comments as appropriate
- Class to - "Clinic Performed"

Click "Accept" when finished

Clinical research center sponsor-supplied machine EKG ✓ Accept ✗ Cancel

Status: Normal Standing **Future**

Expected Date: 11/15/2023 1 Week **2 Weeks** 1 Month 3 Months 6 Months 1 Year ☐ Approx.

Expires: 1/1/2024 1 Month **2 Months** 3 Months

Scheduling Instructions: abc ? ? + Insert SmartText 100%

Comments: abc ? ? + Insert SmartText 100%

ECG for IRB 123-45/Pet Name. Please perform prior to blood draw. Contact Research Coordinator XXX, at xxx-xxx-xxxx with any questions.

Class: **Clinic Performed** External Hospital Performed

Modifiers:

⌵ Additional Order Details

ⓘ Next Required ✓ Accept ✗ Cancel

6. Click "DX Association"

Dx Association Edit Multiple Options

Select order mode

This patient has active treatment/therapy plans.

Outpatient

Clinical research center sponsor-supplied machine EKG
Routine, Expected: 11/15/2023, Expires: 1/1/2024, Clinic Performed

CVS 17313 IN TARGET - MISSION, TX - 2427 E US EXPRESSWAY 83
956-928-7281

LEVEL OF SERVICE PEND SIGN ORDERS (1)

7. Type "Research"

Associate Diagnoses

Zzztestpt, JOE V

research + Add Common Previous Problems

Add a diagnosis to get started

Clinical research center sponsor-supplied machine EKG

All Clear Show signed orders

Accept Cancel

8. Select any of the options with code “Z00.6” and click accept

Diagnoses Search - ZZZTESTPT,EIGHT Z

research

Browse Preference List Database

Diagnoses

External ID	Name	Code	Code Set
725937	Research exam	Z00.6	ICD-10-CM
366592	Research requested antenatal ultrasound scan	Z36.9	ICD-10-CM
366593	Research requested ultrasound scan, antenatal	Z36.9	ICD-10-CM
745873	Research study patient	Z00.6	ICD-10-CM
745689	Research subject	Z00.6	ICD-10-CM
721064	Exam for clinical research	Z00.6	ICD-10-CM
247621	Examination for normal comparison for clinical research	Z00.6	ICD-10-CM
188074	Examination for normal comparison or control in clinical research	Z00.6	ICD-10-CM
290173	Examination of participant or control in clinical research	Z00.6	ICD-10-CM
1618995	Encounter for examination for normal comparison and control in clinical research program	Z00.6	ICD-10-CM
692668	Encounter for examination for normal comparison or control in clinical research program	Z00.6	ICD-10-CM
773946	Encounter for examination of normal volunteer in research study	Z00.6	ICD-10-CM
717430	History of venereal disease research laboratory	Z92.89	ICD-10-CM
1822621	Medical Research Council Breathlessness Scale grade 1 dyspnea	R06.00	ICD-10-CM
1822614	Medical Research Council Breathlessness Scale grade 2 dyspnea	R06.00	ICD-10-CM
1822615	Medical Research Council Breathlessness Scale grade 3 dyspnea	R06.00	ICD-10-CM
1822616	Medical Research Council Breathlessness Scale grade 4 dyspnea	R06.00	ICD-10-CM
1822617	Medical Research Council Breathlessness Scale grade 5 dyspnea	R06.00	ICD-10-CM
1822569	Modified Medical Research Council (mMRC) Dyspnea Scale grade 0 dyspnea	R06.00	ICD-10-CM
1822563	Modified Medical Research Council (mMRC) Dyspnea Scale grade 1 dyspnea	R06.00	ICD-10-CM
1822567	Modified Medical Research Council (mMRC) Dyspnea Scale grade 2 dyspnea	R06.00	ICD-10-CM
1822571	Modified Medical Research Council (mMRC) Dyspnea Scale grade 3 dyspnea	R06.00	ICD-10-CM

Accept Cancel

9. Associate the ECG order with the research diagnosis you selected in the previous step and click accept.

Associate Diagnoses

Zzztestpt, JOE V

Search for diagnosis + Add Common Previous Problems

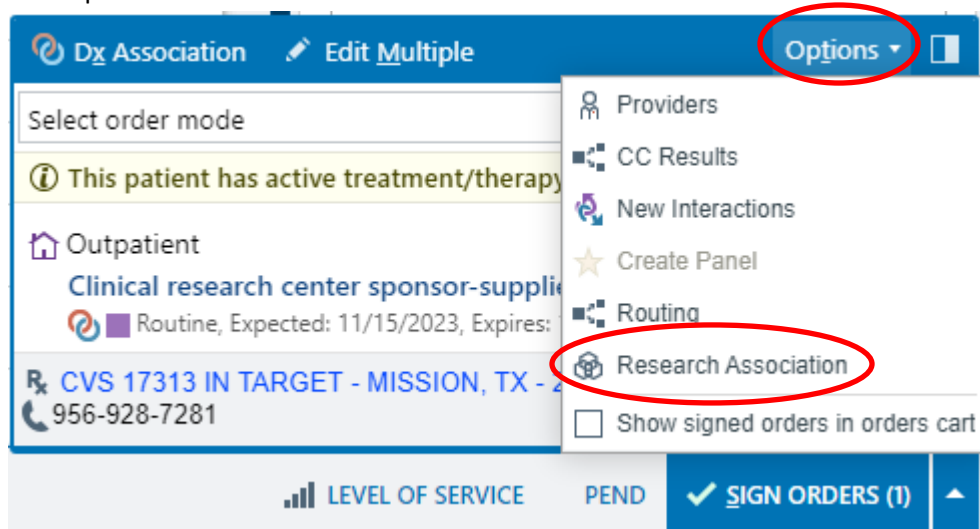
Research exam

Clinical research center sponsor-supplied ...

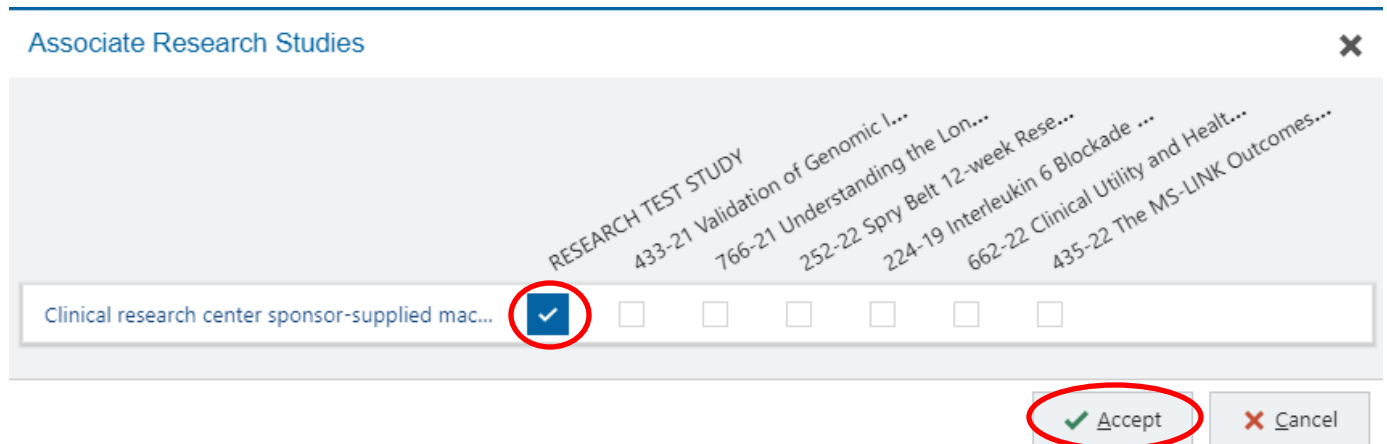
All Clear ☐ Show signed orders

Accept Cancel

10. Click "Options" and select "Research Association"



11. Select the correct research study and click accept.



12. Ensure that all 3 symbols appear (circled in yellow) and select “pend” or “sign orders” as appropriate

The screenshot shows the 'Dx Association' interface. At the top, there's a blue header with 'Dx Association', 'Edit Multiple', and 'Options'. Below the header is a dropdown menu labeled 'Select order mode'. A yellow banner below the dropdown states: 'This patient has active treatment/therapy plans.' with a copy icon. The main content area shows 'Outpatient' status, followed by 'Clinical research center sponsor-supplied machine EKG'. Below this, three icons (a red circle with a white 'X', a purple square, and a green circle with a white 'X') are circled in yellow. To the right of these icons is the text 'Routine, Expected: 11/15/2023, Expires: 1/1/2024, Clinic Performed'. Below this is a blue box containing the address 'CVS 17313 IN TARGET - MISSION, TX - 2427 E US EXPRESSWAY 83' and the phone number '956-928-7281'. At the bottom, there's a blue bar with three buttons: 'LEVEL OF SERVICE' (with a signal strength icon), 'PEND', and 'SIGN ORDERS (1)' (with a checkmark icon). The 'PEND' and 'SIGN ORDERS (1)' buttons are circled in red.

13. Complete the order information by filling in the “order mode” and “ordering provider” sections and click accept when completed.
14. These steps must be completed for each ECG that the CRC is performing (ie if you need a triplicate ECG there must be three orders in epic)
15. The day before the first appointment occurs, email the “CRC Research Assistants” or call 402-552-2285 to ensure that the orders were placed correctly. Please reach out if you have any issues.

Appendix E - How to Schedule with the CRC

1. Create a new appointment within Microsoft Office Calendar for the desired date*.
2. Select "Invite Attendees" and add CRCclinic@unmc.edu along with any other invitees.
3. Enter the pet name of the study, the IRB #, and the visit description in "Title".
4. Enter the correct start and end times for the appointment.
5. Select CRC, or other location if previously discussed, for "Location".
6. In the body of the email, please type the name of the subject and their MRN, visit #/week # (if applicable), services requested, time points (if applicable), and if dry ice is required.

The screenshot shows a Microsoft Office Calendar appointment form. At the top, the title is "Disney Study | IRB# 12345 | Visit 1/Week 1". Below the title, there are fields for attendees: "CRC Clinic", "CRC Research Assistants", "CRC Research Nurses", and "Investigational Pharmacy", with "Dr. Walt Disney" listed as the organizer. To the right of these fields is an "Optional" link. Below the attendees, there is a "Suggested times" section with a button that says "No suggested times" and a link to "Adjust duration and timing". To the right of this section is a "Preferences" link. Below the suggested times, there are fields for the date and time: "2/28/2025" and "12:00 PM", with a dropdown menu for the time. There are also checkboxes for "All day" and "Time zones". Below these fields, there is a "Don't repeat" dropdown menu. Below the date and time fields, there is a "Location" field with "CRC Clinic" selected. To the right of the location field is a "Teams meeting" toggle switch. Below the location field, there is a "Requested Services" section with a list of services: "Exam room for physical exam", "Triplicate ECGs 60 minutes pre dose (-10 minutes) and 1 hour post dose (+/- 5 minutes)", "Phlebotomy pre dose with processing and shipping with dry ice", and "IP administration and 1 hour monitoring period". At the bottom of the form, there is a rich text editor with various formatting options like bold, italic, underline, and a link icon.

7. Send the invitation.
8. The CRC Clinic administrators will accept the invitation if the appointment time works, or they will send a follow-up email if more details are needed or if the appointment will need to be rescheduled.
9. The CRC Clinic administrators will then enter the subject's appointment information in EPIC into the NMC Clinical Research Department's schedule.
 - a. **Please DO NOT edit or change this appointment.**
10. If you have any questions, feel free to call the office at 402-559-7685.

*Whenever possible, please try to schedule appointments at least 2 weeks in advance.

Thank you for using the Clinical Research Center to assist with your studies. Please see the helpful hints below to promote efficient workflow during subject visits.

- Scheduling:
 - When scheduling appointments in Outlook, please indicate whether the coordinator will be present at the appointment (required at Screening). If the coordinator will not be present, please provide a phone number at which they can be reached during the visit.
 - Please include all other pertinent CRC staff members in the invite. The CRC RA email address is CRCResearchAssistants@unmc.edu. If RN services are required, please also include CRCResearchNurses@unmc.edu in the invitation.
- Documentation:
 - If requesting vital sign documentation, please provide source documents and clarify if charting in EPIC is required as well.
- Labs:
 - Please clarify how labs will be drawn (i.e., port- already accessed or needing accessed, PICC line, PIV, phlebotomy).
 - Please specify each specific timepoint which requires a blood draw and identify where this will occur.
 - Please indicate how any study-specific tubes will be provided to the CRC prior to the appointment. If drawing local labs, the CRC can provide their own tubes.
 - Please ensure that lab orders are placed in EPIC prior to the appointment time.
 - Please clarify what should be done with lab tubes after the visit. (i.e., take to local lab for processing, study coordinator will pick up, process and ship to central lab)
- ECGs:
 - Please have the ECG order placed in EPIC prior to each visit. If triplicate ECGs are requested, three separate orders must be placed.
 - For ECGs done in the Treatment Center, please ensure that the Treatment Center RN knows to call the RAs to communicate the specific study timepoints.