From **Research Home Dashboard-** Click “Reports” Section header to go to Epic Reporting Workbench

1. Select **Library tab**
2. Search on keyword: “Research”
3. Click the Template: Find Patients- Generic Criteria- Research User ( to expand)
4. Select the Report :”**MyChart Research Recruitment Using MRN Patient List** ( Public Report)
5. Click Edit- to **make a personal copy –** ( which you can save , use and reuse )
	1. This opens the Report Setting



1. Click : **Save As -** to make a personal copy



1. Give the Copy a Name- Add your intials as a prefix ( can also add a date )



1. Report becomes your personal copy



1. On your Personal Copy – go to the Criteria Tab to enter MRN numbers
2. Add in the EPI:IC Field
3. you can tab down the MRN List to enter quickly
4. Click Save and Run



**Review Report Results:**

Select a Patient - Review Snapshot Report

 

Send Recruitment Request for Multiple Patients –

Use CTL +Click- to multi Select Patients

1. Click “Send Recruitment Request
2. Select Research Study - Patient Facing Study Nat and Desciption will show
3. Click Accept ( to send message)



**Verify that Patient Enrollment status updated** to : “Contacted Pending Response”

1. From the Report- click Refresh and
2. review the Snapshot Report (2)
3. From Chart Review – open chart and drill to the Enrollment Record Detail



 To Find Enrollment Record Details- Open Research Studies Activity – Click Arrow by Study Name



Click Additional Information to open the Enrollment Record



Review Enrollment Details



**Reporting Tips:**

You can “Favorite” your new Report so it shows up on your Research Dashboard

From the Library – click the Star next to the report



From Research Home Dashboard/ Favorite Reports section you can **View** and **Edit** the report anytime

