

### **Procedures: Using Epic to report subject enrollment and study information**

- A. Principal Investigator's (PIs) or their designees are required to enter subject enrollment status information and to forward study-related admission notifications to Clinical Research Budget and Billing (CRBB), using Epic. To do this work, Epic training and access are required.
  1. If an Epic account has not yet been established:
    - a. The administrative manager submits a UW Medicine Account Activation Request Form, requesting setup of the "Research Study Coordinator Security Template" in the form notes section at <https://services.uwmedicine.org/oip/form/newAccount.jsp>.
      - i. Staff person attends the Epic classroom training course, "RES110: Epic Research Participant Enrollment". Register for RES110 at <https://depts.washington.edu/erctrain/Classes.html>.
- B. Within 45 days following the delivery of the final study service, PIs or their designee must submit a billing closeout request to CRBB to deactivate the Epic "RRR" study account, using the survey at <https://redcap.iths.org/redcap/surveys/?s=8IBRzj>.