EHR Participant Recruitment
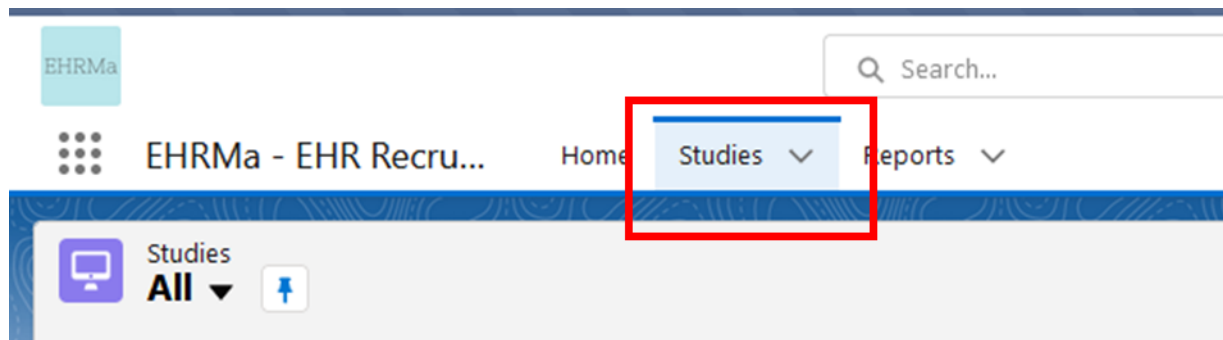
This document demonstrates the workflow for using the CTSI Participant Recruitment Program's EHR Recruitment Service, and applies only to studies that have completed the [EHR Recruitment set-up](#) process with the CTSI Participant Recruitment Program (PRP).

To use the CTSI EHR Recruitment Service, studies will need to use two systems:

- Use **EHRMa** (**EHR R**ecruitment **Ma**nager) to send messages and view metrics. Your account will be created for you by the Participant Recruitment Program as part of the set-up process; sign-in is via MyAccess.
- Use APeX InBasket messaging system to view responses from interested patients. Study team members are responsible for creating their own APeX accounts; once the accounts are confirmed, PRP will add study team members to the research settings in APeX so they can receive responses.

Send Messages and View Metrics (via EHRMa)

1. Log into EHRMa using MyAccess: https://medctr-ucsf.lightning.force.com
2. In the top horizontal Menu, click "Studies" and then select the study for which you would like to recruit. You will only see studies that you are part of that are set up for the EHR Recruitment Service. **Note: you may need to select the drop down arrow next to "Recently Viewed" to view "All" studies.**

3. Once you've selected your study, you will land on the EHRMa Dashboard. An overview of the EHRMa dashboard features is on the next page.

EHRMa Dashboard

Dashboard Features

1: Filter Cohort
Your cohort represents the results of your query that you set up with the programming team. You have the option to add additional filters for language, MyChart account status, and location. All filters are optional.

2. Send Messages
Any filters applied in step 1 will update the results of the "available patients" in the "Send Messages" section.
- You can send up to 250 messages per day to MyChart users.
- There is no limit to the number of letters you can send at once. You can use EHRMa to initiate letters at any time; however PRP will process letters weekly on Friday mornings; letters are typically delivered approximately 10 business days later. The cost per letter is $.53/letter (for batches of 200 pieces or more) or $.86/letter (for batches smaller than 200 pieces.)

Exclude Patients from Recruitment using MRN
Use this button to add a list of MRNs of patients that you want to exclude from your recruitment contact. (For example, patients whom you have already screened and do not qualify for your study.) You only need to do this step once and they will be excluded from your list in the future.

Recruitment Metrics
View EHRMa recruitment activity in this section, including: total number of eligible patients identified through your query; MyChart account status of your cohort, and response data.

View Recruitment Responses and Follow up

When the patient selects "I'm interested" or "No, Thank you" the status of the Research Study is updated respectively. If a patient clicks "I'm interested", the patient's response is returned to study personnel via an APeX InBasket message.

1. Log into ApeX, select the In Basket workspace.

2. Select the message, the message details appear to the right.
   - The patient's decision is noted in the Research Recruitment section.

3. Once a patient indicates "I'm Interested", the study team can respond to the patient as best fits their study workflow.

NOTE: Inbasket messages are not shared with other team members. Messages sent to you, must be managed by you.