EHR Participant Recruitment

This document outlines the workflow for using the CTSI Participant Recruitment Program's EHR Recruitment Service. It applies only to studies that have completed the EHR Recruitment set-up process with the CTSI Participant Recruitment Program (PRP).

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Getting Started:

Congratulations! You're ready to start recruiting potentially eligible patients at UCSF Health. To begin, you'll need access to three primary platforms: EHRMa, APEX, and OnCore.

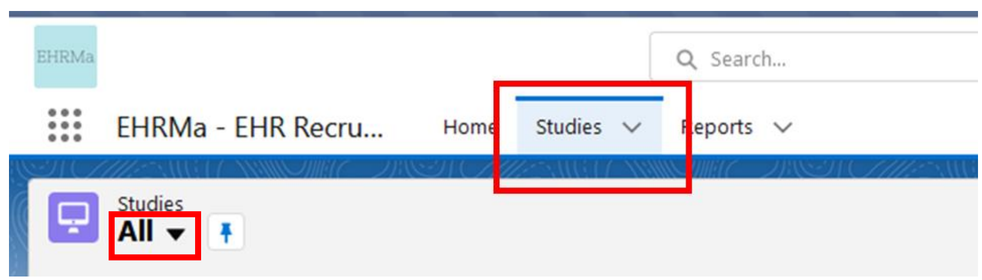
1. EHRMa (EHR Recruitment Manager):
   - Used for sending MyChart messages and paper letters, viewing metrics, and demographic data.
   - Your account is created by the PRP during the set-up process. To request access for additional users, complete the EHRMa Account Request Form.
   - Sign-in via MyAccess: EHRMa Login (URL: https://medctr-ucsf.lightning.force.com/)
2. APeX InBasket Messaging System:
   - Used to view responses from interested patients.
   - Study team members must request/create their own APeX accounts.
3. OnCore
   - Used for assigning APEX study privileges for MyChart recruitment features (interested notifications).
   - Refer to the OnCore quick guide for more information on adding study staff and mapping roles.

Key Points to Remember

- **Daily Limits**: Send up to 250 MyChart messages and 5000 letters **per day**.
- **De-identified Process**: The EHR recruitment process is de-identified until a patient shows interest. Interested notifications are received in APEX.
- **MyChart Messaging:** Messages remain in a patient's inbox until they respond or become ineligible. *Patients cannot be recontacted at this time.*
- **Eligibility Query**: Runs regularly (weekly, monthly, or daily*) to add newly eligible patients and remove ineligible ones.

**Reserved for studies with urgent and rapidly changing inclusion criteria*

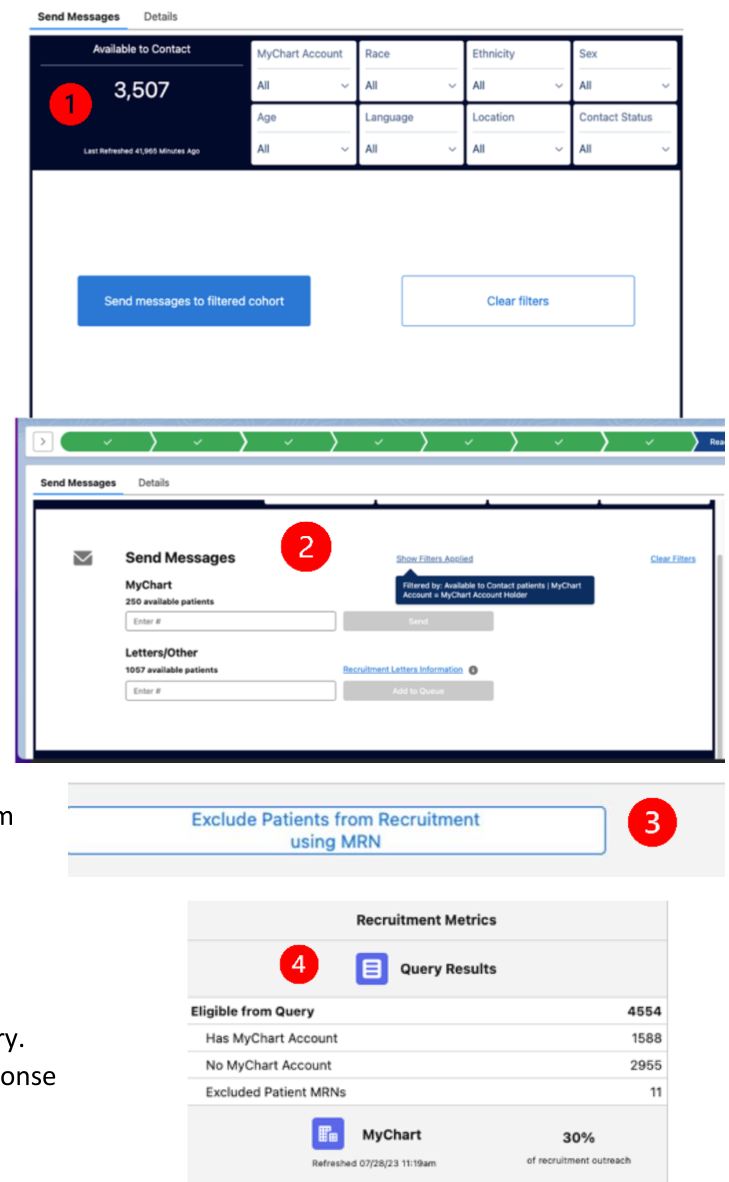
Viewing your study page:



1. Log into EHRMa using MyAccess: EHRMa Login
2. In the top menu, click "Studies" and select the relevant study. You will only see studies you are part of that are set up for the EHR Recruitment Service.
   - **Note:** First, remove the filter by selecting the dropdown arrow next to "Recently Viewed" and choose "All" studies.
3. On the EHRMa Dashboard, you can access various features (details on the next page).
4. 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.

Sending MyChart Messages and Viewing Metrics:

EHRMa Dashboard



Demographic Dashboard Features

1. Selecting Demographic Filters

- **Apply Filters**: Choose filters such as MyChart account status, race, ethnicity, sex, age, language, and location by zip code to match your target audience.
- **Update Cohort Count**: As you apply filters, the dashboard will update the count of the filtered cohort.
- **Optional Filters**: All filters are optional and can be adjusted based on your needs.
- **Review Applied Filters**: Hover over the "Show Applied Filters" hyperlink to quickly review your criteria before sending recruitment messages.

2. Sending MyChart Messages

- **Filtered Results**: Filters applied in step 1 will update the "available patients" in the "Send Messages" section.
- **Message Limits**: Send up to 250 messages per day to MyChart users.
- **No Letter Limits**: There is no limit on the number of letters you can send at once. Initiate letters anytime via EHRMa; PRP processes letters bimonthly.
- **Additional Info**: Visit the Recruitment Letters Information section of the PRP website for details on pricing and mailing schedules.

3. Exclude Patients from Recruitment using MRN

- **Add MRNs**: Use the "Exclude Patients" button to add MRNs of patients you want to exclude from your recruitment contact (e.g., patients already screened and not qualified for your study).
- This step only needs to be done once; excluded patients will remain excluded in future lists.

4. Recruitment Metrics

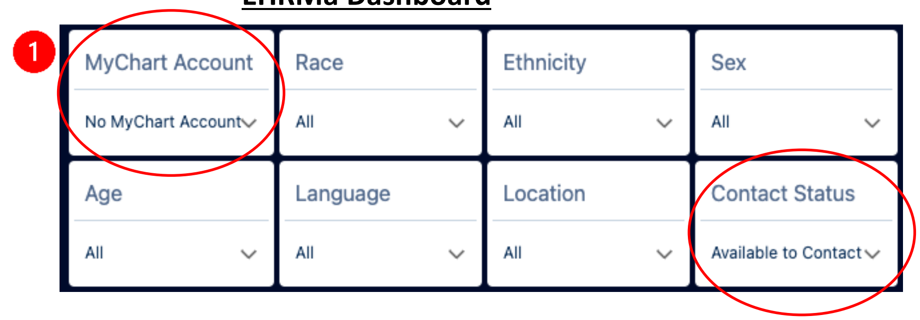
- **Metrics Included**:
  - **Total Eligible from Query**: Total number of eligible patients identified through your query.
  - **MyChart Contact Metrics**: Includes metrics on interested, declined, and waiting for response statuses.
  - **Letters Ordered/Processed**: Number of letters ordered and processed for your study.

Watch the detailed demonstration video: Sending MyChart Messages Tutortial (URL: https://youtu.be/yX2hdjrmRlw)

Ordering Recruitment Letters

PRP ***requires*** including paper letters in outreach efforts to ensure equitable participation in research. We recommend that 10% of your EHR Recruitment outreach be by paper letter. Please visit our **[MyChart Activation Rates and Equitable Outreach]** page to read more about MyChart activation rates and why we require studies to send letters in addition to MyChart messages.

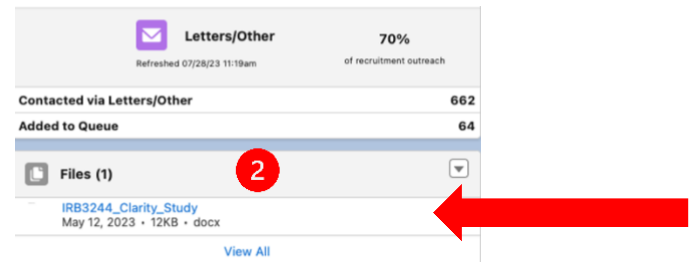
EHRMa Dashboard



1. Filter for Patients without a MyChart Account

- Filter by:
    - **Contact Status**: Available to Contact
    - **MyChart Account Status**: No MyChart Account
- This ensures letters are only sent to users without a MyChart account.
- **For Sending to All Patients**: No MyChart account status filter is needed.

2. Upload Letter Templates



- Go to the “Files” section on the lower right-hand side of the recruitment page.
- Upload your latest IRB-approved recruitment letter. **This is required to process mailing orders**.
- Review and update your letter templates as needed.

3. Mailing Schedule and Discounted Postage

- PRP staff processes mailings twice a month, with letters reaching their destination approximately two weeks after processing.
- For orders over 200 pieces, you’ll qualify for a discounted non-profit postage rate.
- Check the Recruitment Letters Information link on the main page for more details.

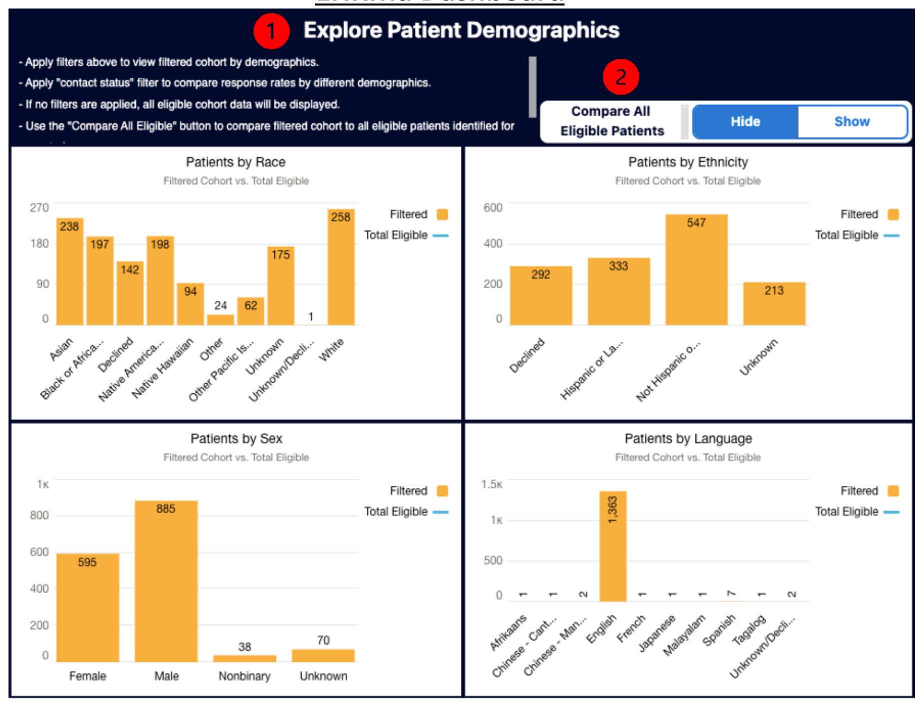
4. Multiple Languages

- If you are sending letters to non-English speaking patients, please upload the translated letters here. If no translated letter is available, all patients will receive the default letter (English) uploaded to EHRMa.

Note: *For a detailed demonstration on sending letters, watch the video: EHRMa Sending Letters Video* ***(URL:*** *https://youtu.be/IEbh9b4QUU4)*

Visualizing Recruitment Demographics

EHRMa Dashboard



1. Explore Patient Demographics
   - Use the "Explore Patient Demographics" section to apply filters for race, ethnicity, age, sex, language, zip code, and contact status.
   - **Tip**: Analyze patient cohorts based on different contact statuses such as "Available to contact," "Contacted via letters," or "Waiting for response" to gain insights into engagement levels.

2. Compare All Eligible
   - Click the "Compare All Eligible" button to compare your filtered cohort with all eligible patients identified for your study, providing a comprehensive understanding of your recruitment efforts.

Note: For a detailed demonstration of these processes, watch the video: [Visualizing Recruitment Demographics Video](https://www.youtube.com/watch?v=yX2hdjrmRlw)
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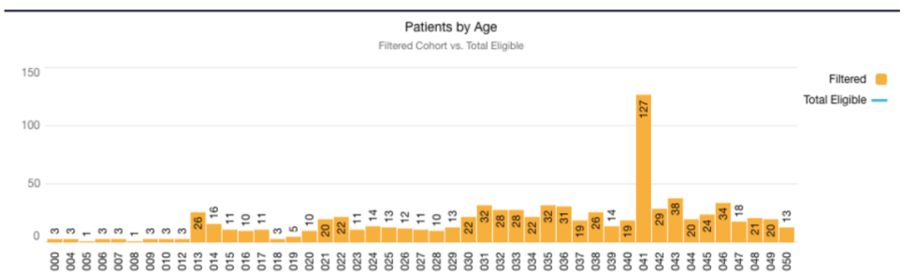
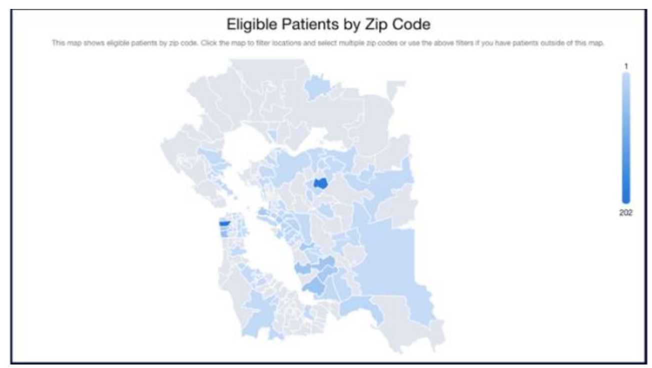




View Recruitment Responses and Follow up

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.

APeX InBasket Messaging

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.

Recruitment SmartPhrase

Create a SmartPhrase in APeX to access pre-stored text for commonly used responses when communicating with patients interested in research. This allows you to easily share survey links, communicate next steps, and provide other relevant information with just a few clicks. More on this can be found online in the UCSF Health APeX Training on SmartPhrases guide.

Maintenance and IRB Compliance

Monthly Maintenance Fee

There is a monthly maintenance fee for using the EHR Recruitment Service. To manage costs or temporarily halt recruitment activities, you can put your recruitment settings on hold by completing the **EHRMa Study Status Update Form**.

IRB Expiration Date Notification

EHRMa operates independently from the UCSF IRB portal, so we rely on you to inform us about your study's IRB expiration date. EHRMa will send you a reminder email (from noreply@salesforce.com) approximately 2 months before your study's expiration date. To ensure your recruitment settings remain active:

- Check the IRB expiration date listed in EHRMa for your study.
- If you have already secured your continuing review, please email PRP with the new expiration date and attach the corresponding IRB approval letter.

Recruitment settings will **turn off** if a valid IRB expiration date is not provided before the current expiration date on file.

Inactivity Rule

To maintain health of the EHRMa platform, studies that have been inactive for more than 180 days will have their recruitment settings turned off. To reactivate, please complete the **EHRMa Study Status Update Form**.

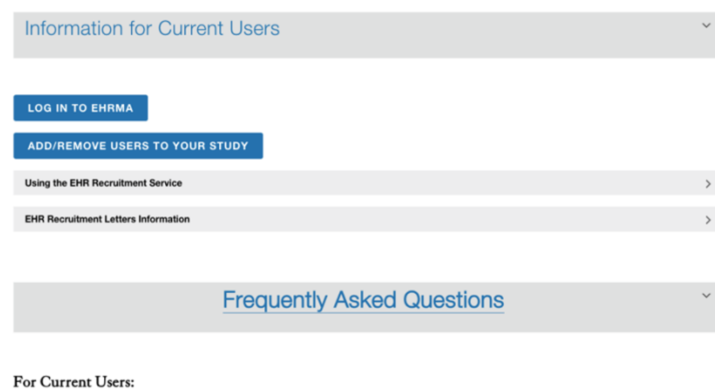
Troubleshooting and FAQs

If you encounter any issues or have questions about using the EHR Recruitment Service, you can contact PRP by email or refer to the FAQs section on the PRP website for guidance.

Visit: PRP MyChart Recruitment Service Information Portal

Here, you will find:

- Detailed information about the service
- Frequently asked questions covering topics such as:
  - Recruiting in multiple languages
  - Updating your recruitment message
  - Updating your query
  - Closing out your study on EHRMa



If you need further assistance, please email us at prp@ucsf.edu.