



Stanford Medicine Children's Health (SMCH) Epic & Clinical Systems Access for Research Personnel

Instructions: Follow these instructions for all Stanford University or SMCH research personnel who need access to (or modification/renewal of) SMCH Epic and/or Clinical Systems access *for research purposes*.

Process Description: University or SMCH research personnel must submit an Online Request followed by completion of an Attestation by the supervisor or PI (Steps 1 and 2 below). Once these are complete, the request will route for approval by Authorized Approver to access SMCH Epic, the Stanford Medicine Children's Health electronic health record (EHR), and any other clinical systems that may be required to support research efforts. A separate Online Request must be submitted per user. *Default access is view-only. For research RN or NP, documentation access may be requested in the Online Request.*

*Requesters who would otherwise obtain Epic and/or Clinical Systems access for clinical or other clinical systems should **not** request access through Stanford Maternal Child Health Research Institute

Who Must Use This Process?

- Stanford University or hospital research personnel who need access to the SMCH EHR for research purposes.

To Request Epic Access for Research Personnel, follow this 3-step process:

STEP 1: Submit Online Request

Submit an Online Request [here](#).

- Requester will be asked to upload 3 updated documents:
 1. CITI Group 7: IRB BioMed/GCP Research Certificate of Completion valid during the time of requested access.
 2. HIPAA "Protecting Patient Privacy" Certificate of Completion valid during the time of requested access.
 3. HIPAA "Privacy for Researchers" Certificate of Completion valid during the time of requested access.
- To download **CITI and HIPAA** certificates of completion:
 1. CITI - go to <https://www.citiprogram.org/>
 2. HIPAA - go to <https://axess.sahr.stanford.edu/group/guest/all-learning> or email hipaatraining@stanford.edu

STEP 2: Supervisor or PI Completes Attestation

Once the Online Request (Step 1) is reviewed and verified, a *unique Attestation link and Code* will be emailed from LPCRResearchEpic@stanford.edu to the Supervisor or PI with the subject line "Action Required: Attestation for LPCH Epic Access: [user]." The attestation link is SUNet authenticated and must be completed by the Supervisor or PI. The link leads to the following attestation:

- I, _____ (supervisor or PI), attest that _____ (research personnel member):
- Is a member of the Stanford University or LPCH workforce who has a clinical research job function (e.g. clinical research coordinator, research nurse, research assistant)
 - Has completed the following required training courses valid during the time of requested access.
 1. CITI Group 7: IRB BioMed/GCP Research
 2. HIPAA "Protecting Patient Privacy"
 3. HIPAA "Protecting Patient Privacy for Clinical Researchers" or HIPAA "Privacy for Researchers"

- Will access patient records only for clinical research purposes.

I further attest that:

- My research needs cannot be fulfilled by the capabilities of STARR (formerly STRIDE)
- I assume full responsibility for ensuring that the User utilizes EPIC only for IRB-approved protocol(s)
- I understand access is granted up to one year from the date of request and that a Renewal Online Request and Attestation must be submitted to renew access.

STEP 3: User and Manager Receive Log-in Information

Once the Attestation is complete (Step 2), the request will be processed by SMCH Epic Access Control. The Username and Password will be emailed to the user.

OTHER INFORMATION

Timeline: After the Online Request (Step 1) and Attestation (Step 2) have been completed, **allow 3-5 business days** for receipt of log-in information to be emailed from Access Control to the user and manager listed in the request.

EMR Access Request (Formerly STARR/STRIDE) (Stanford Medicine Research Data Repository): All personnel requesting access to Stanford Children’s Epic for chart review purposes must obtain a “Research Use Exceeds STARR Capabilities” document or have had one within 1 year of the request prior to requesting Epic. [For personnel supporting a Clinical Trial, please note that this step is not required.]

Please be prepared to upload the specific Research Use Exceeds STARR Capabilities document coinciding with the approved IRB protocol upon submission of an access request. If that document has not yet been generated, please fill out this form to document the reasons for needing Epic for Research:

<https://redcap.stanford.edu/webauth/surveys/?s=XNFJJ3A87J>.

Renewal/Modification: Access is granted for up to one year and renewable on a yearly basis. Follow the same 3- Step process above for renewal or modification requests. Users will receive expiry email notices at 30, 15 and 7 days prior to access end date.

Termination: Supervisors must submit a termination request here when an employee with access to Stanford Children’s Health Epic leaves their position. Please be advised that MCHRI must be notified immediately of any termination or leave from the position in which SMCH Epic access is currently enabled. This includes leaves of absence, internal Stanford University transfers, transfers to Stanford Children’s Health or Stanford Healthcare, as well as employment separation from Stanford University. MCHRI will also perform regular monitoring of access. Should we identify an inactive user, we will send a status confirmation request to the PI/Manager that most recently attested to the individual’s access. Should a response not be received from the PI/Manager within 48 hours, access to Epic will be terminated.

TYPES OF ACCESS

Default Research Coordinator Access

- View access only. Users will be unable to perform any actions (enroll patients, research billing review, link encounters, pending orders, etc.)
- Questions regarding request status contact: lpchresearchepic@stanford.edu.

Advanced Research Coordinator Access

- There are two parts to advanced access. CRCs who will be enrolling research participants into Epic, linking

encounters, pending orders, and writing research notes must complete the SMCH/LPCH Epic Research Enrollment training in SMCH HealthStream.

- If CRCs will be performing Research Billing review as part of their scope of work, they must take the SMCH/LPCH Research Billing Review training also found in SMCH HealthStream.
- For SMCH HealthStream account login/creation or training assignments: contact crso@stanfordchildrens.org

Confidential Access

A higher level of access primarily used for viewing sensitive information and psychiatric notes.

- Submit an Epic request using the link below:
<https://med.stanford.edu/mchri/crso/epic/stanford-children-s-health-epic-access-for-research-staff.html>
- Select “Modification of existing access”. In the additional clinical box, indicate what type of confidential content is needed (ex: Social work notes, Psychiatric notes). Later in the process, when the PI completes the attestation, the PI will be required to provide detailed justification for this access.
- After Confidential attestation has been completed and approved, the user will need to complete required HealthStream training.

Stanford Student Access:

To request access to LPCH Epic for research purposes for Stanford students please select the appropriate affiliation in the RedCap form: **Stanford Undergraduate/graduate student**.

Student's Access request Requirements:

- Period of access limited to up to 6 months with option to submit for renewal.
- PI commits to notifying MCHRI/CRSO if the student researcher leaves their position or no longer needs access for their duties prior to the expiration of the 6-month term.
- No access to confidential content. Any requests for such access must be directed to privacyofficer@stanfordhealthcare.org
- PI must provide specific information about the internship, training program, or course the individual is participating in.
- Student must be listed in the Study Personnel section of e-protocol.
- Student must be able to provide a valid Stanford email address.

Non-Stanford Student Access:

For non-Stanford student. Please select the appropriate affiliation in the RedCap form: Non-Stanford undergraduate/ graduate student.

Non-Stanford Student's Access request Requirements:

- Period of access limited to up to 6 months with option to submit for renewal.
- PI commits to notifying MCHRI/CRSO if the student researcher leaves their position or no longer needs access for their duties prior to the expiration of the 6-month term.
- No access to confidential content. Any requests for such access must be directed to privacyofficer@stanfordhealthcare.org
- PI must provide specific information about the internship, training program, or course the individual is participating in.
- Student must be listed in the Study Personnel section of e-protocol.
- Student must be able to provide a valid Stanford email address.
- PI agrees to maintain a log of all charts the student accesses during their Epic access period.
- PI agrees to, at the conclusion of the student's access period, send the chart review log to privacyofficer@stanfordhealthcare.org

Note:

Syngo Radiology is no longer an application that we use to store PDC ultrasound studies. Radiology and PDC ultrasound studies are stored in Sectra PACS and available using the eUnity viewer. All users with access to Epic will also have access to view Radiology and PDC ultrasound studies by selecting the "Radiology PACS" icon in Epic Web Resources or Stanford Children's Citrix portal.

Syngo Cardiology is a supported application by BioMed and is used for US Echo Cardiology studies. There is no link from Epic to "Syngo" and access is not included with your general Epic access. Please select "True" if you need this access. If "True," the Supervisor/PI will be asked to explain why this access is needed in the attestation (step 2).

Sectra PACS– There is no link from Epic to "Sectra PACS" and access is not included with your general Epic access. Access for Sectra PACS can be requested through this route by including a note in the "Additional Clinical System Access Requested" box with a justification for the use of this application.

For trouble logging into Epic or resetting your log-in and/or password, contact:

Stanford Medicine Children's Health (LPCH} Epic Access Control Team:
LPCHAccessControl@stanfordchildrens.org or 650-498-7500

For questions regarding Epic access or an existing request, contact:
LPCHResearchEpic@stanford.edu

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Stanford Maternal & Child Health Research Institute (MCHRI}

Standard Process: STANFORD MEDICINE CHILDREN'S HEALTH EPIC ACCESS FOR RESEARCH PERSONNEL

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