



SICKKIDS EPIC TRAINING

EpicCare Link (EC LINK) Guide

External Research Monitors

Contents

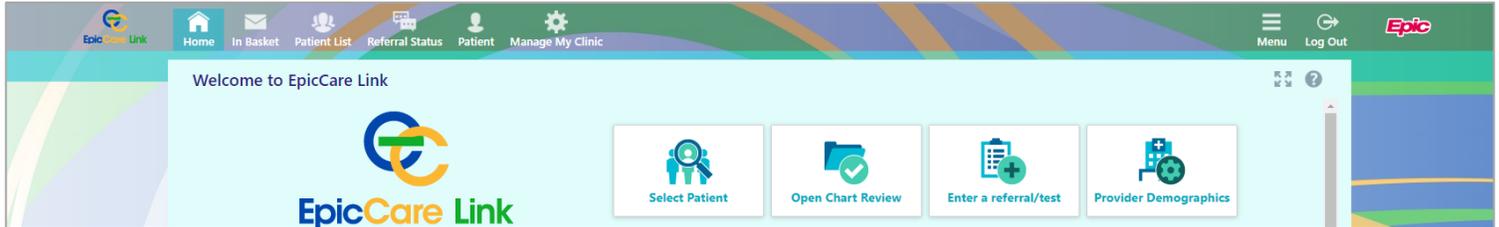
Patient Chart Access for Research Monitors (RM):	3
EpicCare Link (EC Link)	3
ChartMaxx	3
Exploring EC Link for Research Monitoring	4
Patient Charts	5
SnapShot Report	6
Patient Research Study Details	7
Results Review for Labs and Imaging	9
Flowsheet Data (Vitals).....	10
Medical Oversight Note.....	10
Test Your Knowledge – Quiz	11
Exploring ChartMaxx for Research Monitoring	12
What is ChartMaxx?.....	12
Finding Patient Charts	12
Frequently Asked Questions	16
How do I request access for Windows, RSA, EC Link and ChartMaxx?	16
What are my login credentials for Windows, RSA, EC Link and ChartMaxx?	16
If I have an issue with my EC Link account, who do I contact?	16
If I have an issue with my Windows ID, RSA Secure ID or ChartMaxx, who do I contact?	16
How do I access ChartMaxx?	16
How do I access EC Link?	17
Quiz Answer Key.....	19

Patient Chart Access for Research Monitors (RM):

Research Monitors (RM) can access patient charts via two applications:

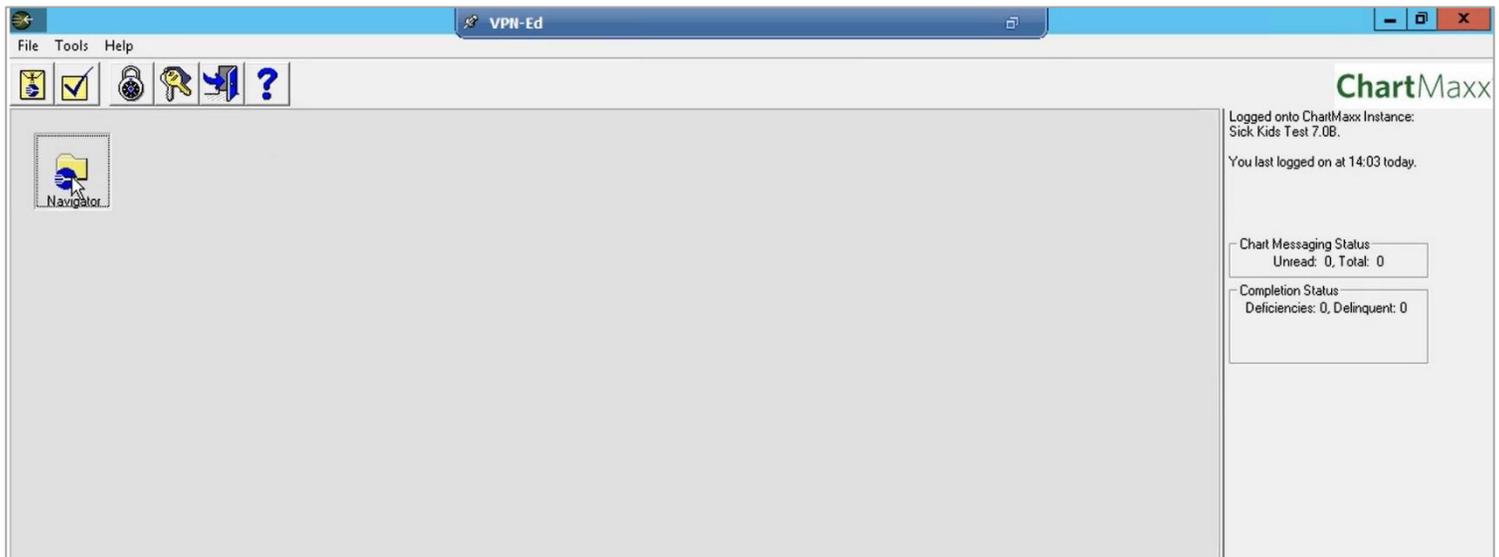
EpicCare Link (EC Link)

- EpicCare Link (EC Link) is a secure web portal that allows research monitors to access released patient charts. Research coordinators will release patient charts *from* Epic to EC Link.
 - *EC Link holds patient data from **after** June 2018.*



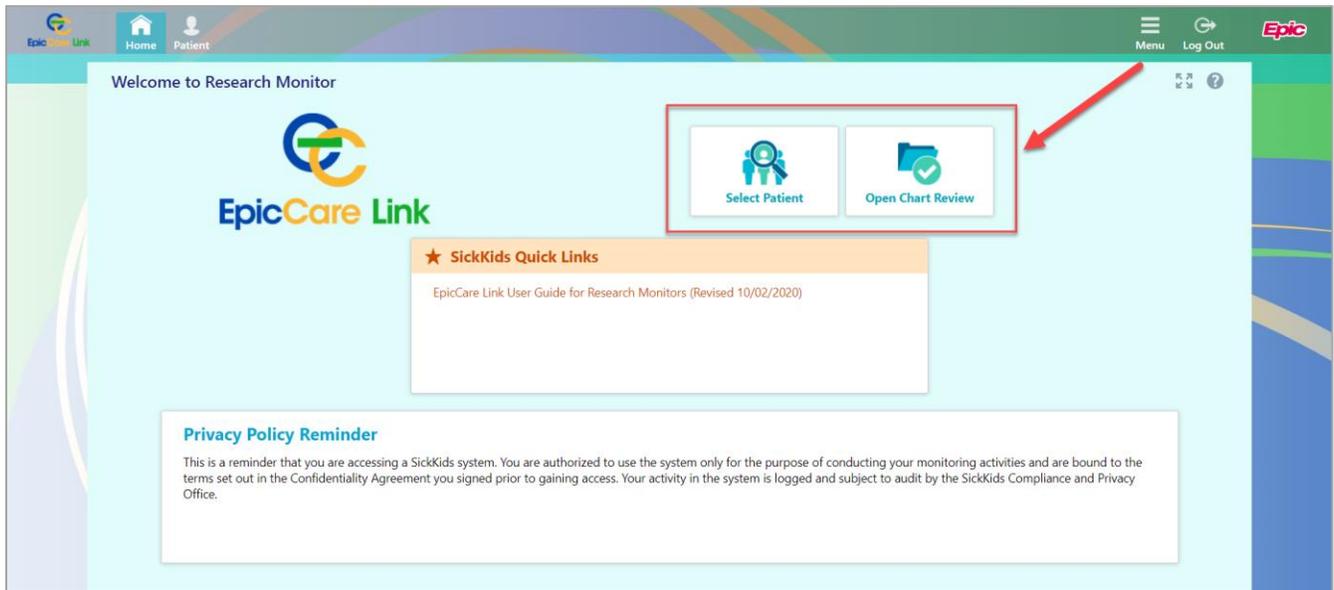
ChartMaxx

- ChartMaxx is SickKids legacy record system that provides research monitors access to scanned documents from past visits. External research monitors will only have access to patient MRN's that are released to them.
 - *ChartMaxx is our legacy system and holds patient data **prior** to June 2018.*

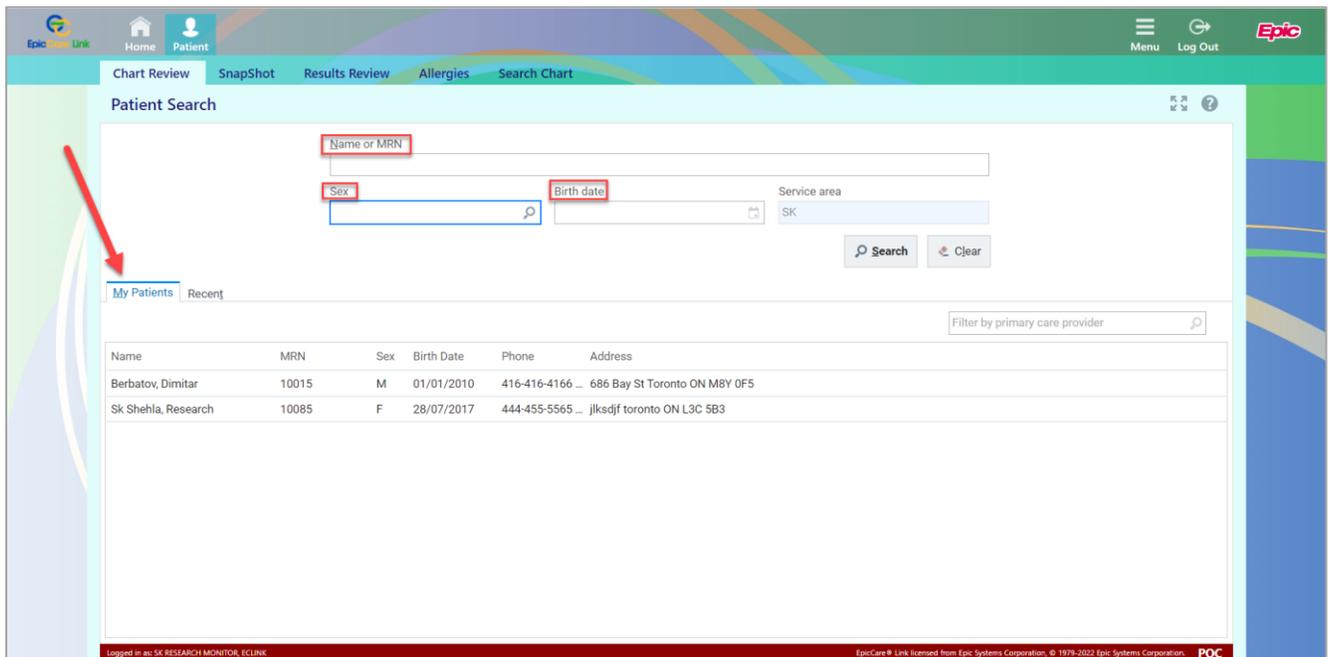


Exploring EC Link for Research Monitoring

Once you have successfully logged in to EC Link, you can access patient charts by selecting either the Select Patient or Open Chart Review activity.



You can either use the search criteria to find a patient by entering their **name** or **MRN**, **sex** or **birth date**. Alternatively, you will have a list of released study patients found in the **My Patients** tab.



Patient Charts

Once you find the appropriate patient, double click to enter their chart. Notice some key features of the patient's chart.

1. The patient's name will be shown in a window at the top of the screen. You can only have one patient chart open at a time. To exit the patient's chart, click on the white X at the top right corner.
2. The patient's *Storyboard* will be shown on the left-hand side of the screen. The storyboard tells a 'story' about the patient by giving some general information that you'll otherwise find in their chart.
3. A list of available activities will be shown on the top toolbar such as:
 - *Chart Review*
 - *SnapShot*
 - *Results Review*
 - *Allergies*
 - *Search Chart*

The screenshot displays the Epic patient chart interface for Dimitar Berbatov. The patient's name and details are shown in the top left. The storyboard on the left provides a summary of the patient's information. The main area shows the 'Chart Review' tab with a table of encounters. The table has columns for Location, When, Type, With, Description, Visit Type, Status, CSN, Research, and Attending Provider. The encounters listed are:

Location	When	Type	With	Description	Visit Type	Status	CSN	Research	Attending Provider
The Hospital for Sick Children (SickKids)	21/03/2022	Documentation	Diagnostic Imaging - IGT - Provider, S			Open	8187656		
The Hospital for Sick Children (SickKids)	14/12/2021	Documentation	Clinical Pharmacology and Toxicology - Jessa, K			Open	8184210		
The Hospital for Sick Children (SickKids)	07/09/2022	Abstract	Rheumatology Clinic - Sk, C			Signed	8192611		
The Hospital for Sick Children	01/09/2022	Appointment	Rheumatology Clinic	No Show	SK RESEARCH COORD ONLY IN-PRSN		8192509		

Within the **Chart Review** tab, you will find patient encounters, notes, medications, lab results, etc. Click on the individual tabs to find relevant information.

- You may also want to apply *filters* to better tailor your search.
- Click on individual records to view more information about the record.
 - *HINT: click on text that is highlighted in blue (hyperlinks) to view more information.*

SnapShot Report

General information pertaining to the patient such as demographics, problem list, allergies can be found in SnapShot tab.

- At the bottom of the SnapShot Report, notice there is a **Research Studies** section.
- Click on the active study to view more information.

The screenshot shows the Epic SnapShot interface for patient Dimitar Berbatov. The 'Research Studies' section at the bottom is highlighted with a red box, and a red arrow points to the 'SK Testing-Asthma Study' entry.

Name	Status	Branch	IRB #
SK Testing-Asthma Study	Enrolled	SK Test RSHBranch A	SKASTHMA

Jump into the active study details of the research monitor snapshot report by clicking on the active study.

Patient Research Study Details

Once you are in the report window with the active study, notice the important details about this patient's research association:

The screenshot displays the Epic Patient Snapshot interface for a patient named Dimitar Berbatov. The interface is divided into several sections:

- Left Panel (Patient Information):** Includes the patient's name, gender, age, date of birth, MRN, and a list of allergies (Bee Pollen, Peanut). It also shows the primary care physician (Winter, Arthur John, MD) and the patient's access to information ends on 7/3/2023.
- Top Navigation:** Shows tabs for Chart Review, Snapshot, Results Review, Allergies, and Search Chart.
- Study Details (1):** A section titled "SK Testing-Asthma Study" showing the Principal Investigator (Provider, Sk Test Researchpi, MD) and the Study Type (Interventional).
- Enrollment Details (2):** A section showing the patient's enrollment status (Enrolled), Start Date (6/2/2022), End Date (30/3/2022), Branch (SK Test RSHBranch A), Coordinators (Sheikh, Shehla), and Enrollment Last Modified (25/2/2022 11:34 AM by Jaffer, Alireza).
- Linked Encounters (3):** A table listing various encounters linked to the study, including appointments and hospital visits.
- Linked Orders (4):** A section showing orders associated with the study, specifically Echocardiography Orders.

Encounter	Department	Specialty	Provider
Appointment on 2/3/2021	SK RHEUMATOLOGY	Pediatric Rheumatology	Sk Rheumatology, Physician, MD
Appointment on 3/3/2021	SK RHEUMATOLOGY	Pediatric Rheumatology	Sk Rheumatology, Physician, MD
Office Visit on 25/5/2021	SK RHEUMATOLOGY	Pediatric Rheumatology	Sk Rheumatology, Physician, MD
Appointment on 20/8/2021	SK RHEUMATOLOGY	Pediatric Rheumatology	Sk Rheumatology, Physician, MD
Hospital Encounter on 7/10/2021	SK IGT	Pediatric Radiology	SK MR5 3T IGT
Research Encounter on 2/12/2021	SK RHEUMATOLOGY	Pediatric Rheumatology	SK RHEUMATOLOGY RESEARCH RESOURCE
Hospital Encounter on 17/3/2022	SK IGT	Pediatric Radiology	SK IGT 1

1. View **Study Details** including the Principal Investigator and Study Type.
2. View **Enrollment Details**, such as patient-study association (status), Study Coordinators, Billing Start Date, Branch, etc.
3. View **Linked Encounters** (i.e., appointments or hospital visits) that have been linked to the study.
4. View **Linked Orders** (i.e., orders that have been associated to the study and billed to the study).

As you continue scrolling through the report, you will find further information related to this patient’s study association:

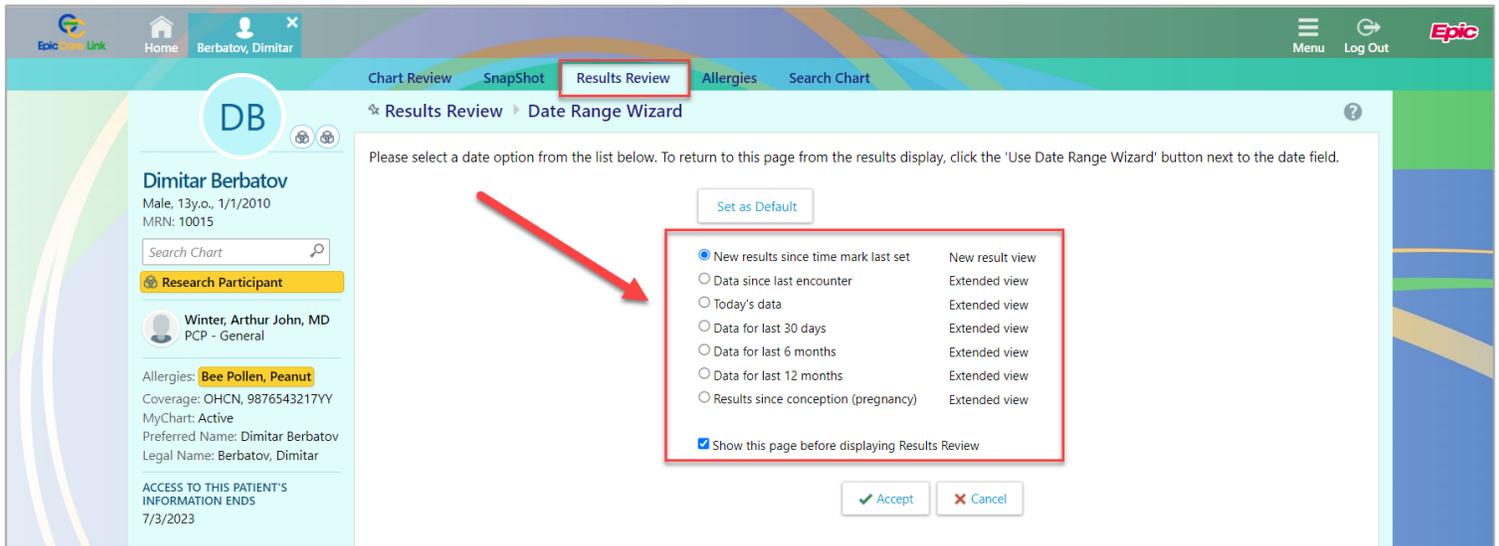
The screenshot shows the Epic Patient Snapshot for Dimitar Berbatov. The sidebar on the left contains patient details: Name (Dimitar Berbatov), MRN (10015), and a list of allergies (Bee Pollen, Peanut). The main content area is divided into two sections. Section 5, 'Data Capture Forms', lists several forms: 'Con Med Log', 'Informed Consent', and 'Re-Consent Form', each with a 'Complete' status and a 'Last Updated' date. Section 6, 'Adverse Events', displays a table of events. The first event is 'Abdominal soft tissue necrosis', which is marked as 'Serious? Yes' and 'Expected? No'. It occurred on 16/2/2022 with a grade of 4. The event is attributed to 'Unrelated' and 'Unlikely' causes. Below the table, there are comments and outcomes for this event.

5. Find forms and logs Within the **Data Capture Forms** section such as the Concomitant Medication (Con Med) Log, Informed Consent and Re-Consent Form. You can click on the individual hyperlinks to view the data entry details.
6. View documented **Adverse Events** for the patient. Adverse Events are reviewed by principal investigator MDs, and include important information such as **Serious** values, **Expected** values, and other necessary details about the adverse event. Click on the event name (blue text) hyperlink to view more information about the specific event.
 - a. Click on the individual adverse event to see more details:

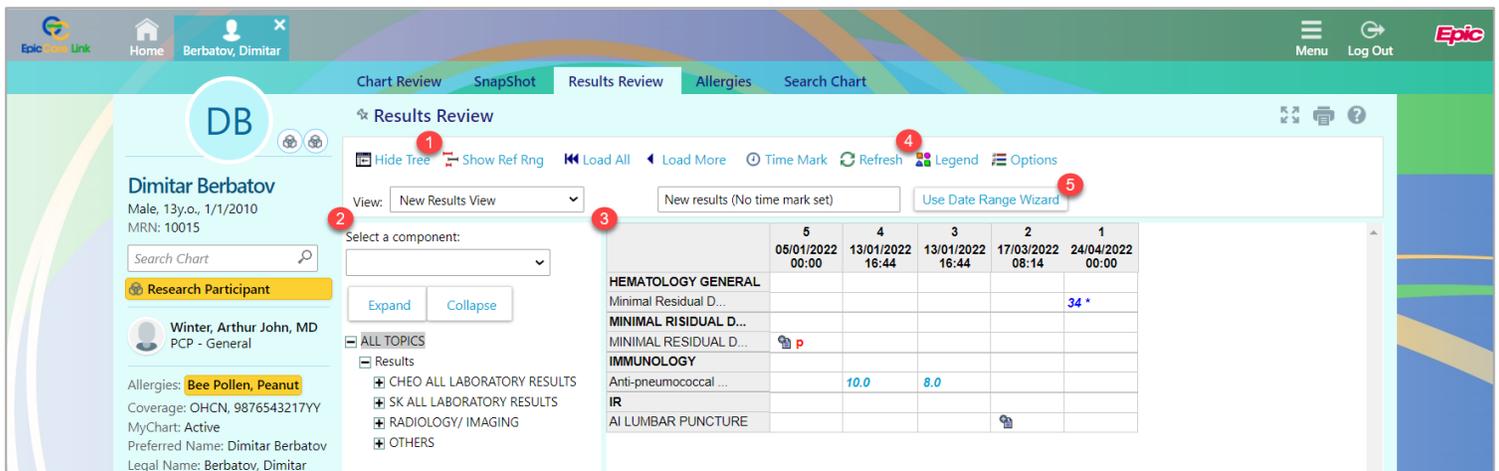
This screenshot shows a detailed view of the 'Abdominal soft tissue necrosis' adverse event. The event name is highlighted with a red circle and the letter 'a'. Below the name, there is a 'Current Data' section with a table showing the event's status: 'Serious' is 'Yes', 'Expected' is 'No', 'Start Date' is '16/2/2022', 'Resolved Date' is blank, and 'Current Grade' is '4'. The 'Attributions' section shows 'Study: Unrelated'.

Results Review for Labs and Imaging

To view a comprehensive list of lab results and imaging, click the **Results Review** tab. You will need to select a date option from the list, indicating which range of results to display. Once you've selected a view, click Accept.



Notice the different features within the **Results Review** activity:



1. Click on the **Show Ref Rng** button to view the reference ranges for each individual lab.
2. Select a specific **component** you are looking for or expand a list of topics in the tree below.
3. View the lab and imaging results in the chart. Notice the different dates and times, indicating when these orders were resulted.
4. Open the **Legend** to better understand each of the flags, component indicators or procedure indicators.
5. Click the **Use Date Range Wizard** button to go back to the date range wizard and reselect your date range.

Flowsheet Data (Vitals)

Vitals and other structured clinical assessment data (e.g., entered by nurses, respiratory therapists, allied health staff) are visit specific and can be found within individual encounters in the **Encounters** section of Chart Review.

- Navigate to Chart Review > Encounters and click a specific visit/encounter. Here, you'll see the last recorded Vital Signs.
- Notice other flowsheet templates below, such as body measurements, custom formula data, ECMO, etc.

Chart Review - Encounters Report Viewer

Reason for Visit History

Vital Signs - Last Recorded Most recent update: 9/9/2020 2:37 PM

BP	Temp	Ht	Wt	BMI
120/80 ! (99 % , Z = 2.31 / 98 % , Z = 1.97)*	35 °C !	130 cm	45 kg	26.63 kg/m ²

*BP percentiles are based on the 2017 AAP Clinical Practice Guideline for boys

Vitals History

Not recorded

All Flowsheet Templates (all recorded)

- Body Measurements
- Custom Formula Data
- ECMO
- Nutrition and Feeding flowsheet
- Vital Signs

Medical Oversight Note

Research Notes, including Medical Oversight Notes can be found in the Notes tab of Chart Review. Click on the blue hyperlink to open the note and view more details.

Chart Review - Loaded:14

Encounters | **Notes** | Meds | Labs | Path. | Imaging | Surgeries | Anesthesia | Procedures | LDAs | Cardio. | Referrals/Consults

Start Review Refresh Filters Exclude

Encounter Date	Encounter Icon	Encounter Type	Creation Date	Filing Date	Service	Note Type	Author	Author Type	Co
09/12/2021		Appointment	09/12/2021 13:30	08/03/2022 15:27	Clinical Research Centre	Research Note	SK Research, Coordinator Non-Clinical	SK Co Nc	SK Co Nc
02/12/2021		Research Encounter	02/12/2021 09:15	02/12/2021 10:30	Rheumatology	Research Note	SK Research, Coordinator Non-Clinical	SK Co Nc	SK Co Nc
16/11/2021		Documentation	16/11/2021 12:39	16/11/2021 15:14	Nursing - Nephrology/Transplant/Chest/GI/Nutrition	Research Note	SK Research, Coordinator Non-Clinical	SK Co Nc	SK Co Nc

Test Your Knowledge – Quiz

1. Which application contains legacy data on patients prior to June 2018:
 - a. EC Link
 - b. ChartMaxx
2. Which application will contain patient data for a visit that took place a week ago:
 - a. EC Link
 - b. ChartMaxx
3. In EC Link, where in Chart Review can you find data on vitals:
 - a. Encounters tab
 - b. Labs tab
 - c. Imaging tab
 - d. Procedures tab
4. In EC Link, where can you find adverse event log and study enrollment details:
 - a. SnapShot tab, within the Research Studies report
 - b. Chart Review tab
 - c. Allergies tab
 - d. SnapShot tab
5. In EC Link, where can you find lab and imaging results?
 - a. Chart Review & Result Review tab
 - b. Chart Review tab
 - c. Result Review tab
 - d. SnapShot tab
6. In EC Link, where can you find demographics, immunization and significant history details?
 - a. Chart Review tab
 - b. Snap Shot tab
 - c. Result Review tab
 - d. Allergies tab
7. In EC Link, where can you find Medical Oversight notes in Chart Review:
 - a. Notes tab
 - b. Snap Shot tab
 - c. Result Review tab
 - d. Allergies tab

Exploring ChartMaxx for Research Monitoring

What is ChartMaxx?

ChartMaxx is a content management solution that provides authorized staff with anytime access to scanned documents from past visits. The same patient documents can be viewed by multiple staff at the same time.

The historical documents from SickKids' previous electronic patient chart, EPC have been migrated into ChartMaxx. Staff will be able to access historical patient charts directly through Epic or through a standalone desktop application.

Finding Patient Charts

Once you login to ChartMaxx, click on the **Navigator Icon**. This is where you can search for a patient chart.

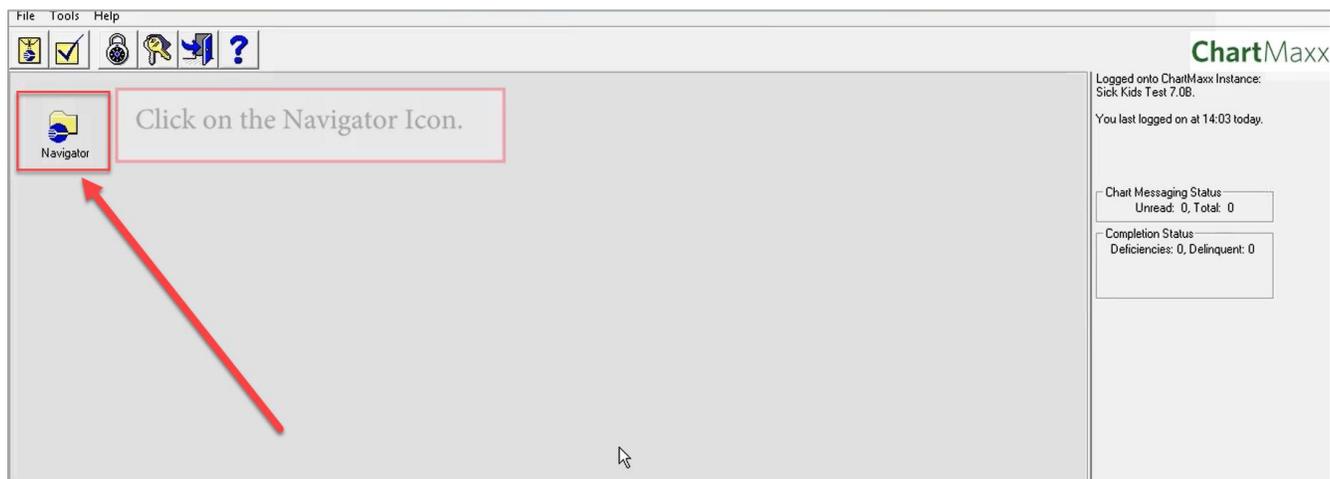
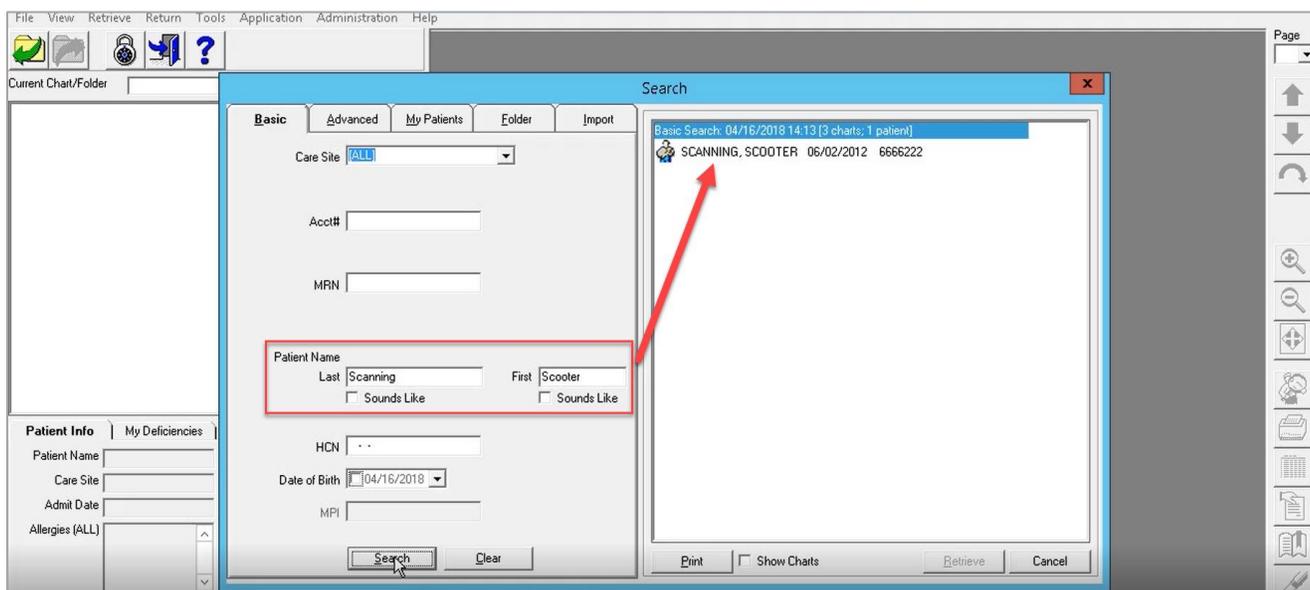
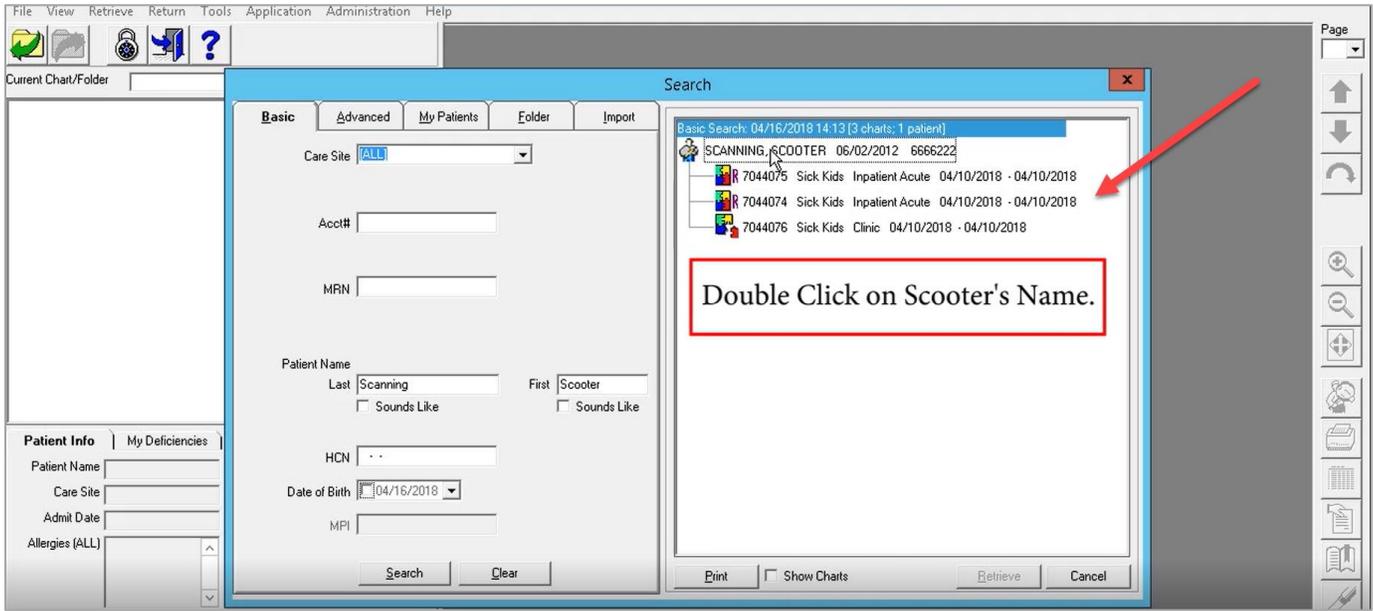


Chart Navigator provides a basic search screen to allow for a search by account number, medical record number, patient name, Health Card Number and/or date of birth. Once you've entered patient information and click **Search**, the search results will return in the window on the right.



Note: Health card number is only searchable to patients admitted after June 2, 2018.

Double-click on the patient's name in the right window and select one or more of the appropriate account numbers or encounters listed.



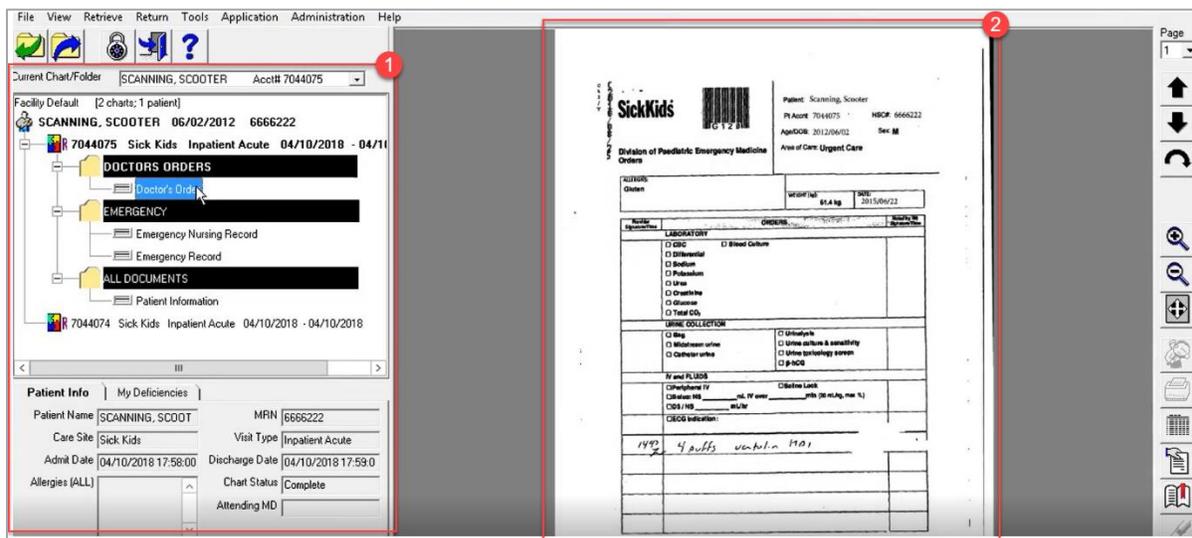
The Table of Contents (TOC) displays at the top-left of the screen. (1) The patient information will display on the pane in the left, and (2) the document selected will display on the pane in the right, also known as the **Document Viewer**. Only available documents will be listed.

The Table of Contents includes patient level information:

- Patient Name
- Date of Birth
- Medical Record Number

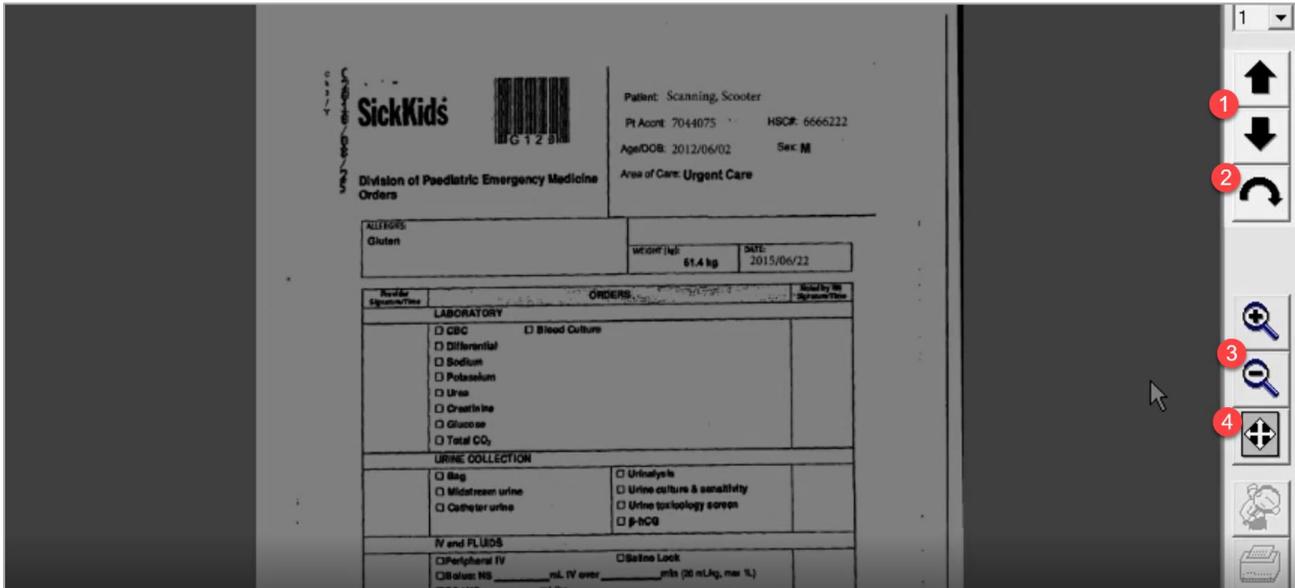
The Encounter Level Information displays:

- Encounter Number
- Care Site



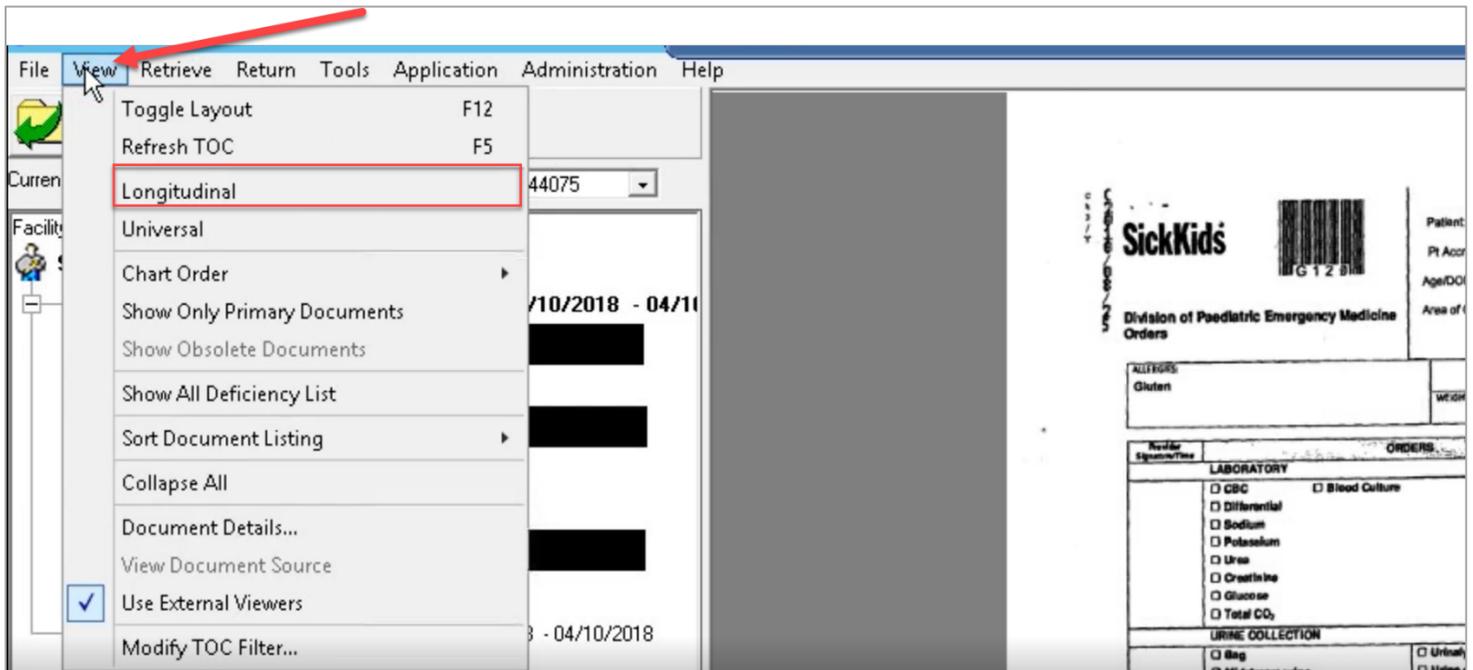
The Document Viewer Toolbar is located on the right-hand side of the screen. Notice some key tools:

1. The up and down arrows can be used to navigate through the chart.
2. The rotate arrow will allow for a document to be rotated 90 degrees.
3. The Zoom In icon allows you to enlarge the image, the Zoom Out icon allows you to reduce the image.
4. The "Fit" icon allows you return the document to its original or default size.



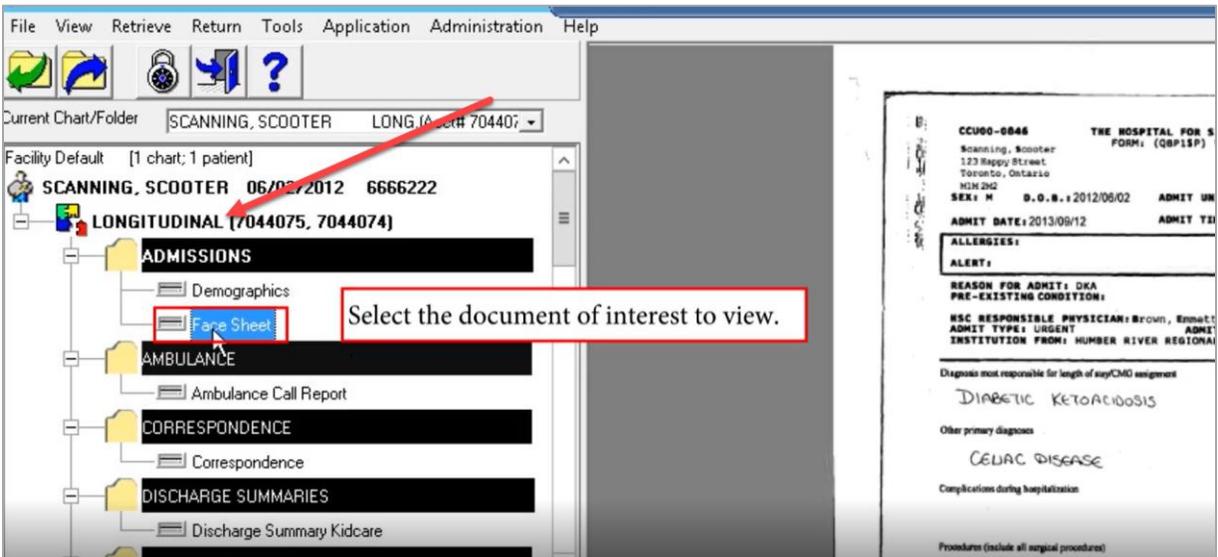
You can view the total number of pages in the selected document at the bottom center of the Document Viewer.

For a different view or to select another patient, navigate to the Menu Bar located at the top left of the screen. Click View at the top of the Menu Bar and select Longitudinal View.



This chart view combines all retrieved charts for a medical record number into a single chart. The account numbers associated with these documents will display in parenthesis next to the word “Longitudinal”. This view makes it easier to review the patient’s history over a series of visits and will group like documents together. This view may be useful when trying to review discharge summaries, labs, etc.

- Click **Longitudinal** under the patient name to bring up all documents for the patient.
- Select the document of interest to view.



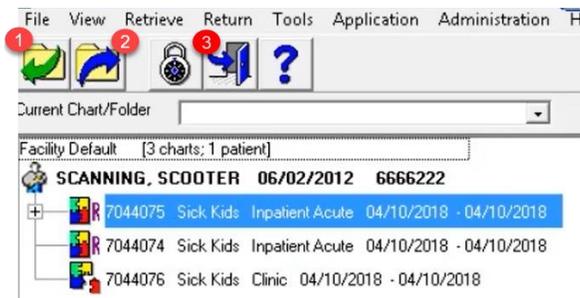
Click the **Retrieve** button to return to your basic search screen to select another patient for review. This will allow you to select all charts related to the patient you are currently viewing.



Initially two accounts were selected for our patient: Scooter Scanning. When “retrieve all charts for patient” is selected; the other visits are now available for review as well.

Notice the two folder icons below and their significance:

1. The first icon below the menu bar (**the green arrow**) will display the Basic Search screen and allow the retrieval of additional patients.
2. The next icon (**the blue arrow**) will allow you to return the visit currently being reviewed.
3. The last icon (**the blue door**) will allow you to exit the application. When you are finished utilizing ChartMaxx, please ensure you exit the application.



Frequently Asked Questions

How do I request access for Windows, RSA, EC Link and ChartMaxx?

Your study team will request access for you. Access requests for RMs can only be made by internal SickKids' staff (the SickKids' study team)

- Requests for RM access should be made *per visit*, and at least **2 weeks in advance** of each visit. Please ask your study team to request the appropriate access required for your visit.

All research monitors must review [this Training Document](#) prior to gaining access to EC Link and ChartMaxx. Access/account details will be provided once this guide has been reviewed.

What are my login credentials for Windows, RSA, EC Link and ChartMaxx?

You will receive *automatic* emails from the Service Desk Notification which will include your username and temporary passwords for **EC Link and ChartMaxx access**. Additionally, if a Windows and RSA account (for remote access) is required and created, you will receive additional e-mails from Service Desk Notification with a subject header: [Remote Onboarding: Welcome to SickKids email X of Y for Research Monitor](#).

If I have an issue with my EC Link account, who do I contact?

Issues related to EC Link accounts should be routed to the SickKids' Service Desk. Please send a detailed email including the terms **'External Research Monitor'** somewhere in the subject line to service.desk@sickkids.ca, or call the Service Desk at 416-813-6722 (open 24/7).

If I have an issue with my Windows ID, RSA Secure ID or ChartMaxx, who do I contact?

Issues related to Windows ID, RSA Secure ID or Chartmaxx accounts should be routed to the SickKids' Service Desk. Please send a detailed email including the terms **'External Research Monitor'** somewhere in the subject line to service.desk@sickkids.ca, or call the Service Desk at 416-813-6722 (open 24/7).

How do I access ChartMaxx?

To access ChartMaxx, navigate to <https://myportal.sickkids.ca>

- Click on **Clinical and Corporate Access**

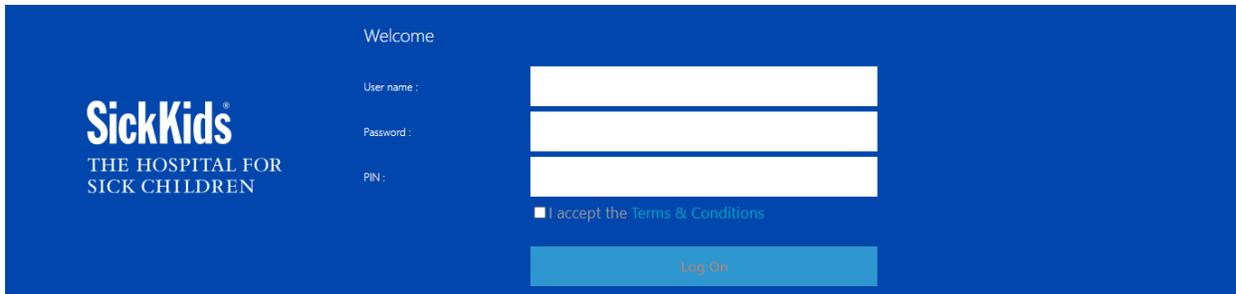
SickKids Remote access services

This site is intended for authorized users only. Please make sure to have updated antivirus software and virus definitions in order to access applications.

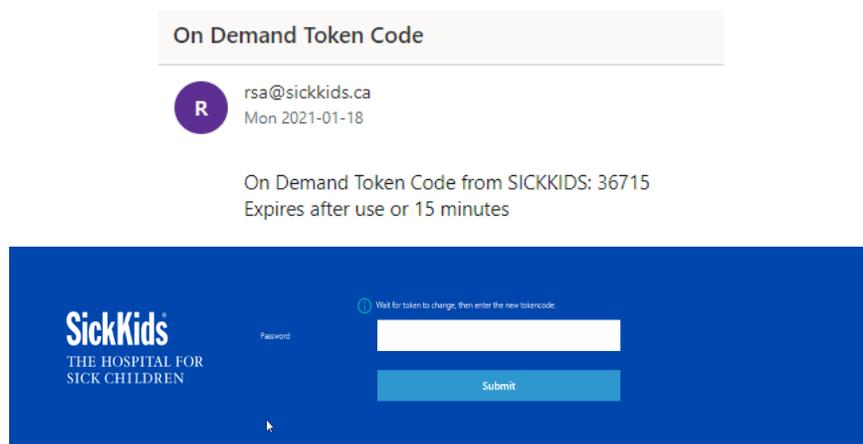
The following remote access services are available to staff through this site. Please click one of the services below:

GENERAL ACCESS (Click here)	CLINICAL AND CORPORATE ACCESS (Click here)	VPN ACCESS (Click here)
What can I access? > Self-scheduling, MyHR, MyFinance, ExpressNet, ExpressNet Touch, COVID-19 Information for Staff	What can I access? > Epic, KidCare, ExpressNet, MyHR, MyFinance, MySickKids	What can I access? > VPN Access to network resources
		What's required?

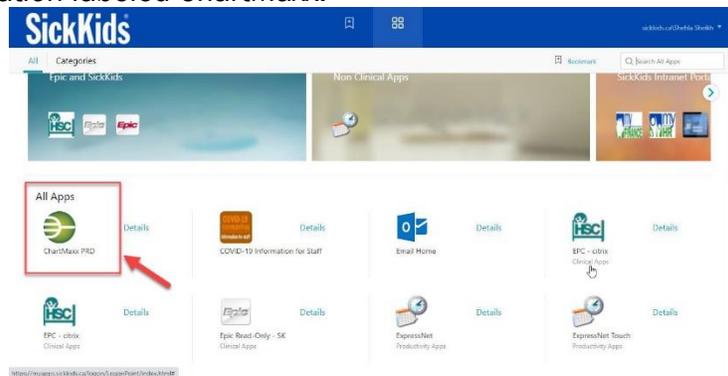
- Enter your *Windows Username, Password, and RSA pin.*
- Accept the Terms & Conditions and click **Log On.**



- You should receive a token code via email from rsa@sickkids.ca. Enter this token code and click Submit



- Click on the application labeled ChartMaxx.



- First time login will prompt you to change your temporary password.
- For username and password details, connect with your study team at SickKids.

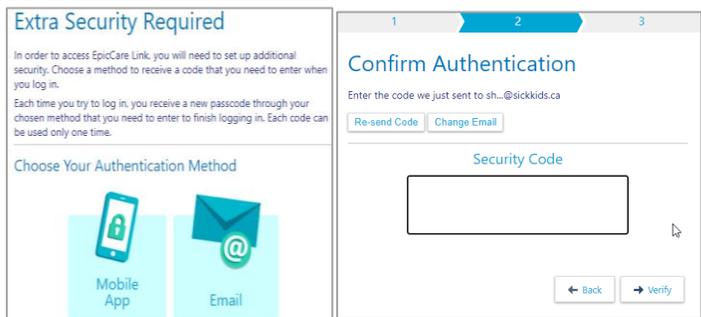
How do I access EC Link?

Research Monitors can follow these steps to access EpicCare Link (EC Link):

- Use the following link to log in to your EC Link account for Epic access:
https://epiccarelink.kidshealthalliance.ca/EpicCareLink-PRD/common/epic_login.asp
- Connect with your study team at SickKids' for username and password details for EC Link.
 - a. *First time login will prompt you to change your temporary password. New password can be a combination of letters and numbers and must be at least **9 characters in length***
 - b. *This will prompt you for **multifactor authentication**. Choose your authentication method (Mobile App or E-mail):*

Mobile App:

- Download the *Epic Authentication App* on your mobile device via the App Store.
- Scan the QR code using Epic Authentication App on your mobile device. Once a code is displayed on your cellphone, enter this in the Security Code field.

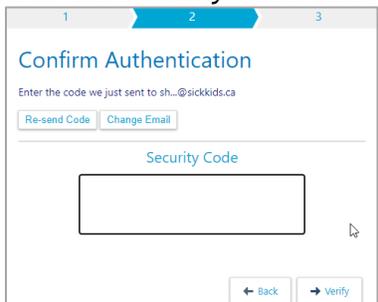


Email:

- Enter an e-mail address to receive the security code.
- The authentication code will be sent to your specified e-mail address from noreply@kidshealthalliance.ca with a subject header of 'Research Monitor Authentication Passcode'



- Once a code is generated, enter this in the *Security Code* field:



- Second time login: the system will send you a passcode using the authentication method selected (Mobile, Email) in the previous step.

Quiz Answer Key

1. Which application contains legacy data on patients prior to June 2018:
 - a. EC Link
 - b. ChartMaxx**
2. Which application will contain patient data for a visit that took place a week ago:
 - a. EC Link**
 - b. ChartMaxx
3. In EC Link, where in Chart Review can you find data on vitals:
 - a. Encounters activity**
 - b. Labs activity
 - c. Imaging activity
 - d. Procedures activity
4. In EC Link, where can you find adverse event log and study enrollment details:
 - a. SnapShot tab, within the Research Studies report**
 - b. Chart Review activity
 - c. Allergies activity
 - d. SnapShot activity
5. In EC Link, where can you find lab and imaging results?
 - a. Chart Review & Result Review activities**
 - b. Chart Review activity
 - c. Result Review activity
 - d. SnapShot activity
6. In EC Link, where can you find demographics, immunization and significant history details?
 - a. Chart Review activity
 - b. Snap Shot activity**
 - c. Result Review activity
 - d. Allergies activity
7. In EC Link, where can you find Medical Oversight notes in Chart Review:
 - a. Notes activity**
 - b. Snap Shot activity
 - c. Result Review activity
 - d. Allergies activity