

UF Health Shands Epic Access Request Form for Research Team Members

User Info: New User Access Change/Addition

Access Requested for (Full Name):	Job Title:
UFID or Shands Employee #:	Phone:
FTE: 0.5 FTE or more Less than 0.5 FTE	Email:
College: Department/Unit: Within UF Academic Health Center (UF Health)? Yes No	Is your primary role research? Yes No. Provide IRB #s for studies that you are managing in Epic:

Manager/Supervisor Info:

Name: _____ Phone: _____

Job Title: _____ Email: _____

Select the role that best matches the activities the user needs to perform in Epic:

Epic Role	Coordinator or Non-provider PI	Other Research Assistant	Study Invoice Tracking	Research Admin & Oversight
Epic Activities To Perform	<ul style="list-style-type: none"> • Edit my studies in Epic, e.g., edit study short title, coordinator(s), study billing reviewer(s), etc. • Associate participants to my studies in Epic, maintain participant enrollment statuses, and active start/end dates • View study billing protocols • Link encounters to my studies and study timelines (if applicable) • Perform research billing review and correction • Pend research orders for providers 	<ul style="list-style-type: none"> • Edit my studies in Epic, e.g., edit study short title, coordinator(s), study billing reviewer(s), etc. • Associate participants to my studies in Epic, maintain participant enrollment statuses, and active start/end dates • View study billing protocols • Link encounters to my studies and study timelines (if applicable) • Perform research billing review and correction 	<ul style="list-style-type: none"> • View my studies in Epic • View my study participant associations • View study billing protocols • View encounters and orders for study participants • Perform research billing review and correction 	<ul style="list-style-type: none"> • Edit studies in Epic, e.g., edit study short title, coordinator(s), study billing reviewer(s), etc. • View study participant associations • View study billing protocols

List additional Epic activities to perform which are not listed for selected role:

***Note:** Research team members who wish to request medical records for review should contact the Research Section of HIM at 352-594-0916 or via email at hirmsch@shands.ufl.edu for assistance. Research Reports may be requested by contacting Liz Horne I2B2 Ontology Coordinator at lizhorne@ufl.edu.*

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Epic Training and Documentation

Go to <http://epictrain.health.ufl.edu/documentation/user-documentation/research/> to access the latest Epic research training and documentation.

User Signature: _____

Date: _____

Manager/Supervisor Signature: _____

Date: _____

Instructions

- ✓ Fax this completed request form to Shands IT Security Team via 352-627-4444.
- ✓ **OR** open a Help Desk Ticket at <http://ithelp.ahc.ufl.edu/ServiceDesk.Support/> attaching this request form.
- ✓ Note: new users requesting Epic Access for the first time need to provide a copy of completed and signed Shands Confidentiality and Security Agreement <https://ufhealth.org/sites/default/files/media/community/Security-Confidentialty-Agreement.pdf>.

Comments (For Identity & Account Management Use Only):