



Topic: Research Recruitment Clinical Note

Facility: IU Health Facilities

Audience: Clinical Researchers

What: This Job Aid explains and illustrates how to create a clinical note, send it for electronic signature from the Principal Investigator (PI) and for review by the treating physician and/or PCP and to set the Research/Clinical Trial Records note type as the Default Document Type.

Why: IU Health follows a consistent and transparent process when documenting research recruitment.

Create a Research Recruitment Clinical Note

Per Clinical Research Recruitment Policy, when recruiting Indiana University Health, Inc. (IU Health) patients as potential human research subjects a “clinical note will be filed within the Research/Clinical Trials Records folder of the patient’s electronic medical record (EMR) and will include...”

- Full Study Title
- Sponsor
- Sponsor Protocol Number
- NCT number
- IRB Number
- PI Name

The steps, below, are all performed within a patient’s EMR – PowerChart.

Step	Action
1	Click the Clinical Notes band in PowerChart’s Table of Contents.
2	Click the Add button on the Clinical Notes toolbar.

The screenshot shows the PowerChart interface. On the left, a 'Menu' sidebar is open, listing various options. The 'Clinical Notes' option is highlighted with a red box and a circled '1'. On the right, the 'Clinical Notes' toolbar is visible, with the 'Add' button (represented by a document icon) highlighted with a blue box and a circled '2'. Below the menu, there are sections for 'Progress Notes' and 'Research/Clinical'.

The Add Document window displays (see screen shot, next page).

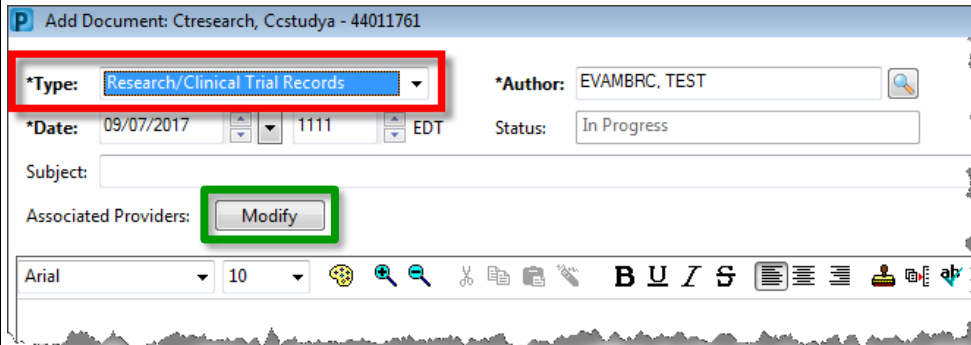
Continued on next page

Create a Research Recruitment Clinical Note (continued)

Step

Action

3 Designate the **Research/Clinical Trial Records** note as the **Type** to be used.
The selected type determines in which Clinical Notes folder the note will be stored.



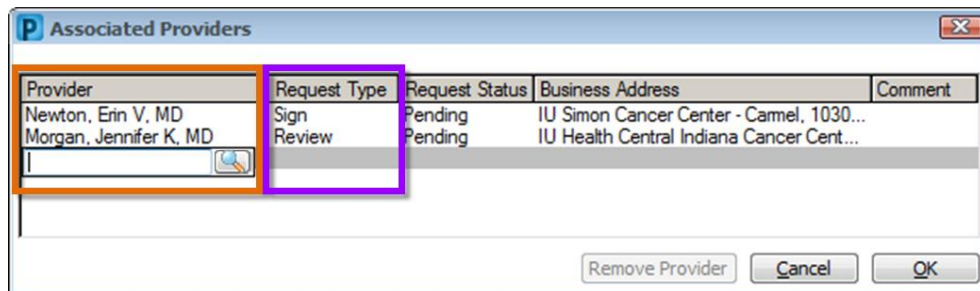
- a. Accept **Research/Clinical Trial Records** as the previously set Default Document Type (*the user can set the Default; see the next section, "Set Research/Clinical Trial Records as the Default Document Type," page 3*).
 - i. Skip to **Step 4**.
- b. Select the **Research/Clinical Trial Records** option.
 - i. Click the **Type** field drop-down arrow.
 - ii. Select the **Research/Clinical Trial Records** option.

4 Enter a **Subject** using this format:
<**Study Title**>,<colon>(<space>),<space>,<**Enrollment Note PI**>

Sample: "Celgene-sponsored and collaborator CC-486 clinical trials in Breast Cancer: Nigh, Andrew D. MD: Enrollment Note PI"

5 Enter **Associated Providers**.

- a. Click the **Modify** button (*see screen shot, Step 3, above*).
The Associated Providers dialog box displays.



- b. Search for the **Principal Investigator (Provider column)**.
- c. Select the **Sign** option in the **Request Type** column.
- d. Search for the **treating physician** or **PCP (Provider column)**.
- e. Select the **Review** option in the **Request Type** column.

Continued on next page



Create a Research Recruitment Clinical Note (continued)

Step	Action
6	Enter the clinical note in the free-text workspace.
7	Click the Sign button. <i>The View New Document window displays.</i>
8	Select the Remember my selection and do not display this message again checkbox. <i>Making this selection allows all newly created notes to display immediately upon signing.</i>
9	Click the Yes button. <i>The newly created note displays in the Result Pane, to the right.</i>

Set **Research/Clinical Trial Records** as the Default Document Type

A user may set a default document type in order to facilitate automatic selection of the appropriate document type when creating a clinical note in PowerChart.

Step	Action
1	Click the Clinical Notes band.
2	Click the Documents menu (<i>on the menu bar at the top of the window</i>).
3	Click the Options command. <i>The Clinical Note Options dialog box displays.</i>
4	Ensure the Document Types tab is selected.
5	Click the Default Document Type drop-down arrow.
6	Select the Research/Clinical Trial Records option.
7	Click the OK button. <i>All new clinical notes will now default to the Research/Clinical Trial Records note type.</i>

