CTMS BCM Epic Study Setup Form

The CTMS BCM Epic Study Setup Form (BESS) is used to set up the research account in Epic (RSH Record). Completion of this form is required in order to associate patients to studies and take full advantage of the research workflow in Epic 2015.

Log into CTMS and select the BCM Epic Study Setup Form Button

Enter the protocol’s H number to begin a new form or to continue working on a saved draft. Once entered, click ‘Go’.

The BESS form for the H number entered will now be displayed.

Several fields will be automatically populated from BRAIN ESP1 and cannot be edited in the BESS form. These include the principal investigator (PI), PI email, PI phone, and study title.

Required fields are designated by a red asterisk (*) and must be completed. Optional fields should be completed as applicable. To enter study personnel, enter the person’s last name first in the BCM EPIC Access section. Once 3 or more characters are entered, a drop down list of people matching the name is generated. Select the person from this drop down. Once selected, the person’s full name, BCM ID and ECA are populated automatically. Select the person’s study role from the drop down. Please note, only study personnel with current BCM EPIC access should be entered in this section. Study personnel that require BCM EPIC access should contact their department CDA. Only study personnel entered in this section will have access to run reports for the study in Epic.
The form can be saved at any time. Simply click on the ‘Save’ button located at the bottom of the form. To search for saved forms, enter the H number (as outlined in the beginning of this document) and click ‘Go’. Once in the form, select ‘Edit’ which will be located at the bottom of the form to continue filling out the fields. If all required fields are complete, the form can be submitted. If required information is missing, error message will appear.

Submitted BESS forms will be reviewed by the ICTR to ensure the information entered is accurate and the study personnel entered in the form have current BCM Epic access. If information is inaccurate or study personnel listed in the BCM EPIC Access section do not currently have BCM EPIC access, the study BESS form will be returned to the user who submitted it along with an email message outlining the reason for the return.

Epic RSH record set up will occur after the BESS form has completed the ICTR review process.