Atrium Health
Wake Forest Baptist

WakeHealthLink (WHL)

External Study Monitor Guide

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Important First Step

Please refer to https://ctsi.wakehealth.edu/Service/Clinical-Research/Research-Coordinator-Toolbox and open the **Establishing External Monitor Access** section for the initial step that is required prior to completing the information in this document. This link will provide you with the **External Monitor Request Form**, mentioned below.

!	Complete the External Monitor Request Form and submit to the IRB Office using the link above.

Definitions for the purpose of this document

WakeHealthLink: a tool that provides real-time web access to patient information so an external monitor can access patients' clinical and research data (accessed via https://www.wakehealthlink.org)

WakeOne Hyperspace: WakeOne as launched from an internal user's desktop or portal (orange WakeOne icon)

Research Staff Member: Responsible for placing the monitor's WHL access request via ServiceNow and communicating login information to the monitor. Responsible for adding study patients to the patient group via WakeOne Hyperspace. Responsible for assisting the study monitor with navigation/access issues to WHL and/or placing a ServiceNow ticket if the monitor is having access issues.

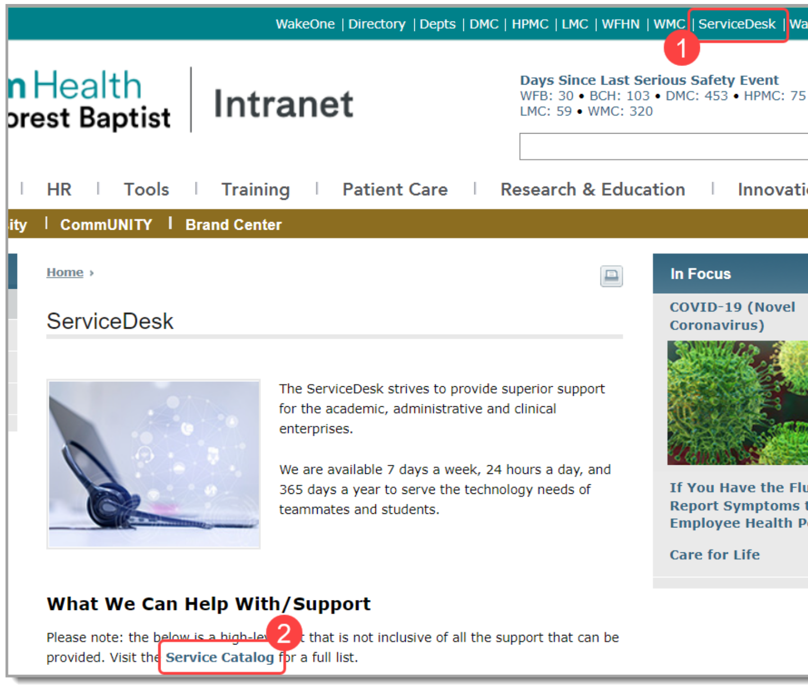
External Study Monitor: not an AHWFB employee. Needs temporary access to view study particpants' WakeOne medical record via the WHL website. Cannot view all patient records, only those added to the patient group.

Gaining WHL Access for External Study Monitor

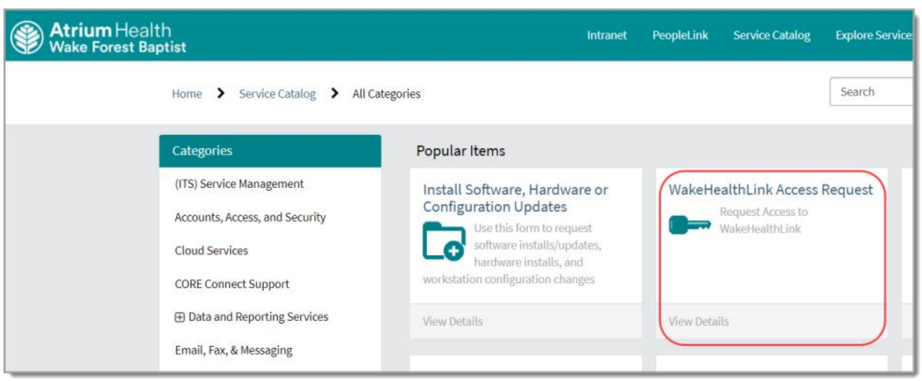
Complete the ServiceNow IRB WHL form by following the steps below or click here.

1. Access the Service Catalog by selecting the **ServiceDesk** option on the top of the Atrium Health Wake Forest Baptist intranet page.

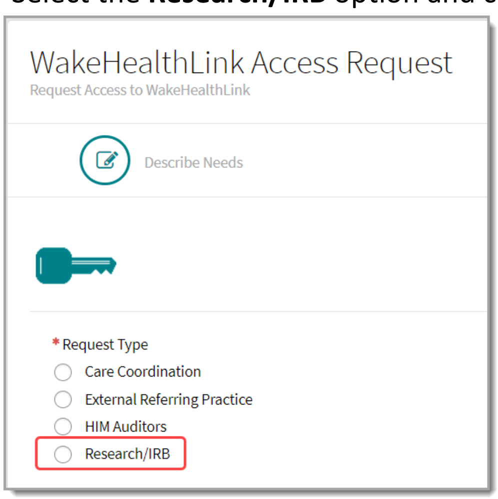
2. Select the **Service Catalog** link.



3. Within the Service Catalog, select **WakeHealthLink Access Request**.



4. Select the **Research/IRB** option and complete subsequent information.



Receiving the Monitor’s Login Information

1. The study monitor’s account will be created within 14 days after the IRB Office approves the ServiceNow request for access.
2. The requestor from the ServiceNow ticket will receive a completion email alerting him/her that the request has been completed. This email will contain the monitor’s login information.

!	The staff member that entered the ServiceNow ticket requesting access will be the ONLY one to receive the monitor’s WHL log in information and is the sole person responsible for communicating that information with the monitor!!!!

3. This email must be retained as it will contain login information in the following format:

   User Name: **WHLTestMo**

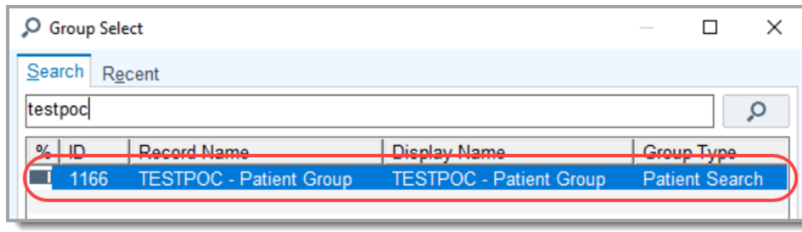
   Temporary Password: **WHLTestPassword**

4. This email will also include the **Patient Group** number. The research team member who placed the ticket will use this number to add patients to the Patient Group. This controls which patient charts the monitor has access to in WHL.

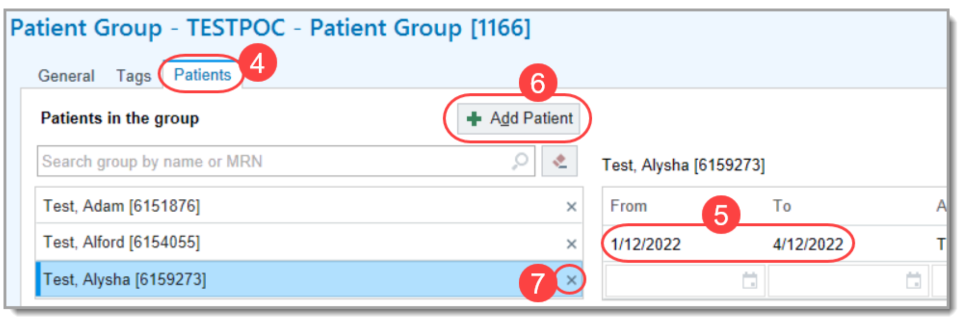
Adding Patients to a WHL Patient Group

!	You MUST log in to the MC OFFICE OF RESEARCH department in WakeOne Hyperspace to have access to the Patient Group Activity.

1. Click the double chevron icon on the top Hyperspace toolbar within WakeOne, and select the **Patient Group** activity.
   a. Alternatively, click the magnifying glass just under the **Log Out** button.
   b. Enter “patient group” and hit Enter.
2. Enter the Patient Group name, Patient Group number, or IRB number provided by the WakeOne security team and click the magnifying glass. Double-click on the row to open the correct Patient Group.



3. Click on the **Patients** tab.
4. Highlight the first patient listed in the group to view the dates the patient will be active in this Patient Group. Edit any dates if necessary. If the **To** field is left blank, the patient will show in this group until manually removed.
5. Click the **Add Patient** button to add more patients if necessary.
6. If a patient needs to be removed from the group, click the **x** to the right of the name.



7. Once your list is complete, click the **Accept** button at the bottom right.

i	Each patient must be entered individually via manual entry.

!	If the research staff member does not have access to the Patient Group activity, the staff member’s manager/supervisor must submit a ServiceNow ticket requesting this access.

Monitor Logging in to WHL

Browser, system and connection requirements

Must use one of the following internet browsers to access WakeHealthLink:

- Google Chrome 50 and any later versions
- Microsoft Edge version 79 or later

WakeHealthLink requires a minimum screen resolution of 1024 x 768 pixels. We recommend that you use a high-speed network connection to achieve the best system speed and performance. If using WiFi, signal strength may play a part in system slowness or connection issues.

If you receive an error regarding connectivity when logging into WakeHealthLink or if you log in and are immediately logged back out, please contact your network administrator for your practice. This is typically related to a firewall, browser settings, or network security at your facility. Other troubleshooting options: clear your browser cache, re-launch WakeHealthLink, and/or reboot your computer.

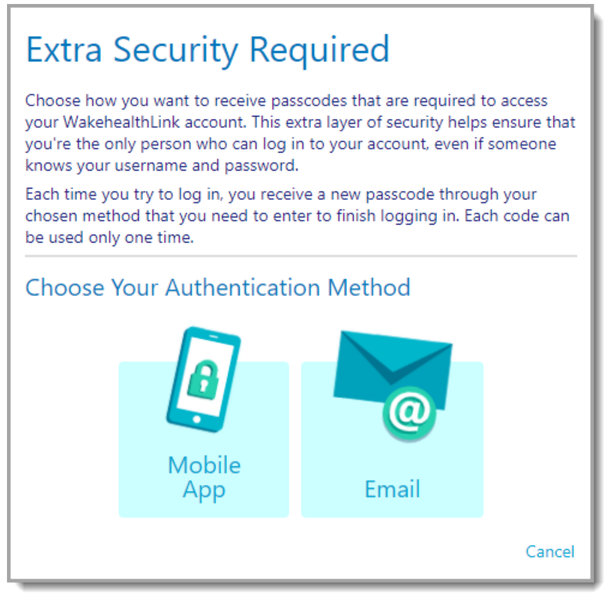
Logging in to WHL

1. From a web browser go to https://www.wakehealthlink.org.
2. At the WakeHealthLink login screen, the monitor will enter the user ID and Temporary Password that was provided in the ServiceDesk completion email.
3. The monitor will immediately be prompted to set a new password after logging in.

4. Once the temporary password is changed to the personal password, the temporary password expires and will no longer work for future visits to WHL. The monitor must now always use the personal password.

Set Up Two Factor Authentication

1. Select **Mobile App** or **Email** in the Extra Security Required window.

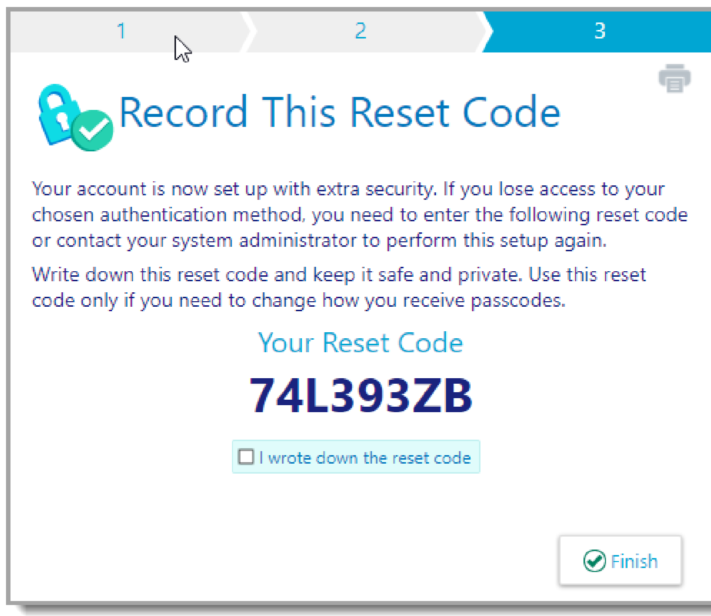


2. Enter either your phone number or email address and click Next.

ⓘ	Download the Epic Authenticator app on your smart device if you choose to use the Mobile App option.

3. WHL will send a passcode to the Epic authenticator mobile app or email address you indicated. Enter this passcode in the Confirm Authentication window.

4. Click **Verify**.



5. The final window you will see is imperative. It contains your own personal reset code you will need to enter if you ever want to change your authentication method. Write this down and save it for your records.

!	If you lose this code and need to reset your two factor authentication, let your site administrator know!

Once this process is complete, you will need to authenticate again the next time you log in.

- On the Enter Your Passcode window, select the **Remember me** checkbox if you're using a personal device. You will not need to input a passcode for the next 30 days on this device, unless you log in through a different browser or your browser's settings are reset.

- When logging in to a different device or public device, the first log in will require authentication. Selecting the **Remember me** box will maintain authentication for 8 hours.

Challenge Questions

You will be prompted to set up challenge questions after logging in. This is mandatory for study monitors!

In the event you forget your password, you can use these to reset it and regain access quickly and independently.

!	Save your answers in a secure location for easy reference. If you get locked out and cannot answer your challenge questions correctly, it will take up to 5 business days for the WakeOne Security and Access team to reset it.

Troubleshooting Tip

!	All ServiceNow tickets must be entered by the research staff member, NOT the external monitor. The research staff member will serve as the liaison between AHWFB IAS and the external study monitor. ServiceNow tickets from external monitors will not be addressed by the AHWFB IAS team.

Monitor Navigating in WHL

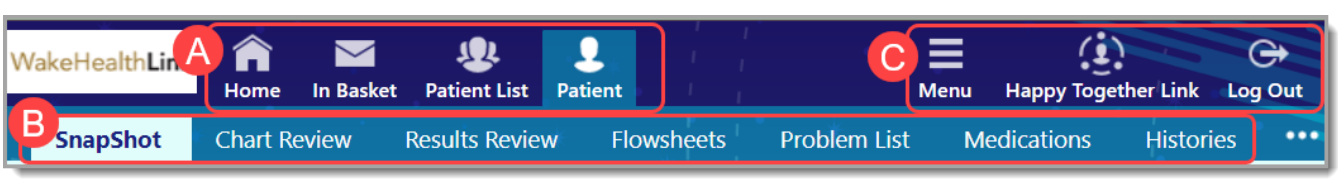
When you log in to WHL, several sets of navigation tools appear at the top of the page.

A) **Navigation Tabs**: Use these tabs to open different activities in WHL. Each tab contains one or more related activities. For example, the **Patient** tab contains patient-specific activities. When you click a tab, the default activity for that tab opens.

B) **Activity Menu**: Use this menu to open the various activities that are contained in the selected navigation tab. For example, the **Patient** tab activity menu contains the **SnapShot** and **Chart Review** activities.

- If there are more activities than can fit on the screen, hover over the ellipsis on the far right of the menu to see all the activities contained in the tab.

C) **Action Options**: Use these buttons located at the top right of the screen to see all of your available activities or to log out.



Logging Out

To maintain patient confidentiality, you need to log out or secure your screen when you are done working or have to leave the computer for any reason. There are two ways to do this:

- Click **Log Out**. The next time you log in, you are directed to your start page.
- Secure the computer by going to **Menu > Secure**. When you log back in, you will return to the same activity that you were using before you secured the screen.

!	If the system times out and logs you out, you may need to clear your cache. You may receive an error and be immediately logged back out after a timed out session.

Accessing the Patient Chart

Select the patient's chart from a list of available patients

1. Click Patient **Patient** in the top toolbar. The **My Patients** tab will open by default.

i	If you have access to many patients, your patients might appear on more than one page. Use the field at the top of the page to search for patients by their name.

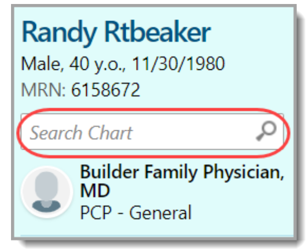
2. Click a patient's name to view the chart. This opens to the **Patient Snapshot** report where you can review overview information on the patient.
   - You can click other reports from the toolbar to view other information.

3. You can review the patient information in the **Storyboard** on the far left. This contains information like DOB, allergies, and the patient's PCP.

!	If there are no patients displaying for the external study monitor, the research staff member needs to add the appropriate patients to the specific patient group that was provided in the ServiceNow ticket with the monitor's log in information.

Review Patient Chart

Find information quickly in the patient's chart



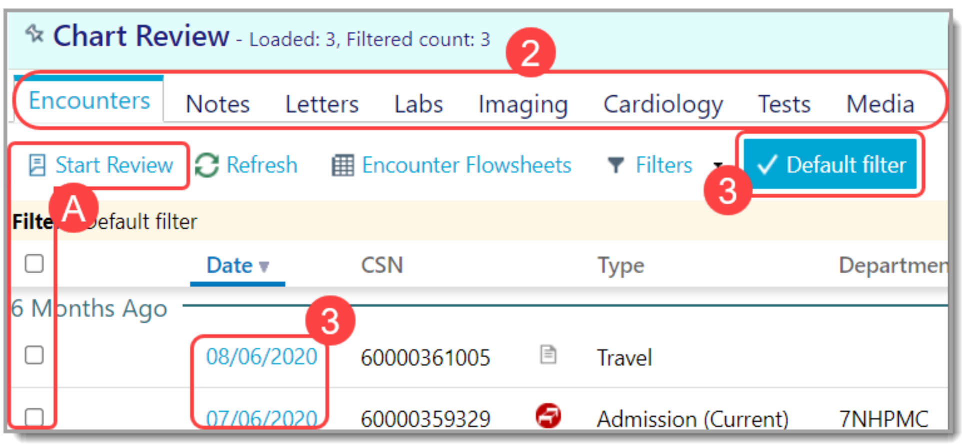
Enter text in the **Search Chart** field found in the **Storyboard** on the left to quickly find specific information. For example, search for "cholesterol" to see a list of relevant matches in the patient's chart, such as **lipid panel results** and **progress notes** that mention cholesterol.

Comprehensive review of the patient's chart

1. Click  **Patient** and enter the patient's name or MRN. Click **Search**.

2. Click the **Chart Review** tab. This activity is organized into various tabs: **Encounters**, **Notes**, etc.

3. Within the **Encounters** tab, click a specific visit date to view more detail. To see more information (upcoming appointments, patient messages, etc), unclick the **Default Filter** box.

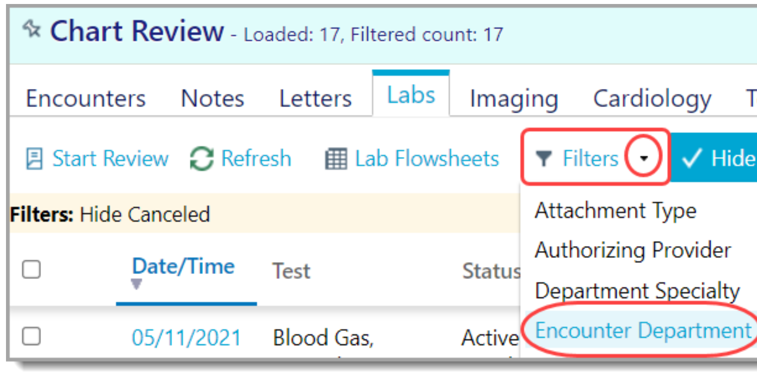


   A. To view details on several encounters (rows) at once, select the check boxes in those rows and click **Start Review**.

   B. Jump back to the list of encounters by clicking the **Back** button at the bottom right.

Use filters to narrow the list of information you see

1. In **Chart Review**, select a tab (**Encounters**, **Notes**, etc).
2. Click the down arrow next to the **Filters** button in the toolbar, and select a filter type. Select check boxes next to the values that you want to see.
3. Click **Apply** at the bottom left of the screen to view the filtered data.



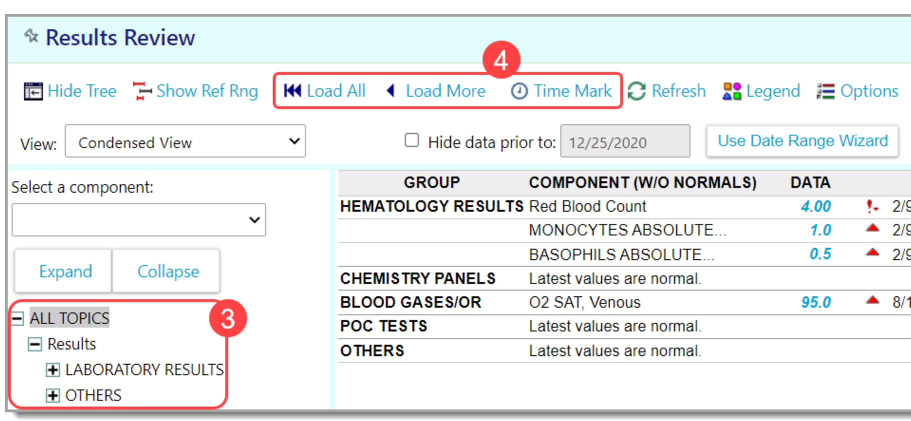
> To remove the search criteria, click Clear All Filters in the top toolbar.

View trending data in graph or table format in Chart Review

1. In **Chart Review**, select the check box for the data you want to view.
2. Select the type of flowsheet that you want to create.
   - Click **Encounter Flowsheets** to graph data such as vital signs or medications. Then select a specific flowsheet, such as Diabetes - Brief.
   - Click **Lab Flowsheets** to graph lab result data.
3. Click and drag to select the table cells that contain data you want to graph.
4. Click **Line Graph** or **Bar Graph** to create a graph of the selected data.

View a patient's trending lab results in Results Review

1. Select the **Patient** tab, click a patient name, and click **Results Review**.
2. Select the date range for the results data you want to see and click **Accept**.
3. To view a specific result component type, such as Hematology, or a specific result component, such as Hemoglobin, expand the tree on the left. Select the name of the component or component type that you want to view.



To view more columns of results, click **Load More** in the top toolbar. To view all columns of a patient's

View other patient specific information

Hover over the **Patient** tab and, after selecting a patient, click:

- **Medications** to view the patient's current medications.
- **Histories** to view a report with information about the patient's medical, surgical, family, and socialhistory. Social history includes topics like tobacco use and secual activity.
- **Demographics** to view a report with demographic information such as the patient's address, PCP,emergency contacts, etc.
- **Coverages & Benefits** allows you to review a complete summary of benefits and deteremine whether aparticular service is covered in or out of network, whether the coverage is active, and what the patient portion will be for a particular service.