1. **Complete the MRN Request Form for subjects who are NOT in Epic medical records system.**
   Be sure to complete a “Resend Msg” in Epic to refresh OnCore MRN lookup.

2. **If you cannot push any subjects from OnCore to Epic, verify potential MRN validation errors here.**
   Be sure OnCore and Epic’s patient’s chart are not open at the same time.

3. **If you do not remember which subjects or visits were tracked previously, ERMS is still viewable.**
   Subject’s visits and/or activities that were not tracked in ERMS **must** be tracked in OnCore for an invoice to be generated to receive funds.

4. **Do you have a monitor coming soon? See attached Epic forms.**
   The appropriate forms must be completed by your study monitor. Once the monitor completes, send them to HIM along with the approved IRB letter, as a part of the access request for the study monitor.

5. **To complete your billing review in Epic, be sure to create the patient timeline in Epic.**
   Subjects are placed on a 100% bill hold once they are in OnCore and pushed to Epic. However, charges need to be reviewed in Epic to be released. Check the Learning Home Dashboard for tips on how to “Review Billing Charges” in Epic. Timelines help the system determine where to route charges. These charges generally correspond to specific study visits or a related group of study visits.

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**Upload a Consent?**
Do not forget to upload the subject’s signed consent in OnCore.

**Need OnCore Assistance?**
Login to Zoom, Monday-Friday, 10:00 am – 12:00 pm
For Epic assistance, call 8-HELP (404-778-4357) or log in an Epic Issue Form.

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**OnCore Training?** Sign up for OnCore training in ELMS > Find Learning > OnCore.

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**Note:** Emory Healthcare Credentialing is required for Emory clinical research staff who have direct contact with subjects in an EHC facility and/or will need access to patient medical records for EHC subjects, including remote staff who need access to patient’s medical records. Contact research.credentialing@emoryhealthcare.org for more details.