

Research in the NM Health System

Standard processes to align research with clinical priorities to promote successful implementation and sustainability.

Overview

The goal of these processes are to promote embedded research in the clinical setting, facilitate successful implementation and promote sustainability.

This Process Applies To Research That:

- Involves or requests health system function support (these are shared resources).
 - Examples: Changes in Epic, Performance Improvement Staff, Analytics, Quality
- Proposes to impact clinical care
- Proposes a significant impact to clinical workflows
- Involves 2 or more regions

Overview of Aligning Research with the Health System

Pre-Award

Step 1: Initial proposal review

Submit a high-level overview of the proposal to research@NM.org. Please see specific questions to consider in addition to sending your Specific Aims page.

- A system navigator will reach out to scope your proposal from a clinical, operational, compliance, and IS perspective to then bring in appropriate departments and walk the project through necessary approvals (see flow chart in Slide 5).
- Information Services will have a good understanding of what can or cannot be developed in Epic, current NM best practices for EMR builds, etc. as well as security and application reviews necessary to identify the best tools for your needs
- Information Services will provide a high-level estimate of the work required to complete the proposal for the HSCC to consider when reviewing
- Your navigator will facilitate co-production conversations with clinical and operational leaders across the regions and clinics to be involved

Step 2: Presenting at HSCC

- A system navigator will engage the facilitator of the proper HSCC(s). You will receive a meeting invite from the facilitator or forwarded from the IS Business Relationship Manager (BRM)/ Informatics for either a HSCC preparation meeting, the HSCC meeting, or sometimes both. The IS Research Coordinator will help you understand the HSCC timeline, as meetings typically occur once monthly.
- You should ensure that yourself, any other subject matter experts, and clinical champions are at the meeting to help present the project. (Your BRM/Informatics/Epic application representatives should already be invited)
- During your presentation, you will use an SBAR to provide a brief overview of the ask and allow time for discussions and questions.
- Documentation of clinical and operational buy-in, via both your system navigator and HSCC approvals as needed, will be submitted to NM Health System leadership to review and provide, when appropriate, a formal Letter of Support to accompany your grant submission

Awaiting proposal funding

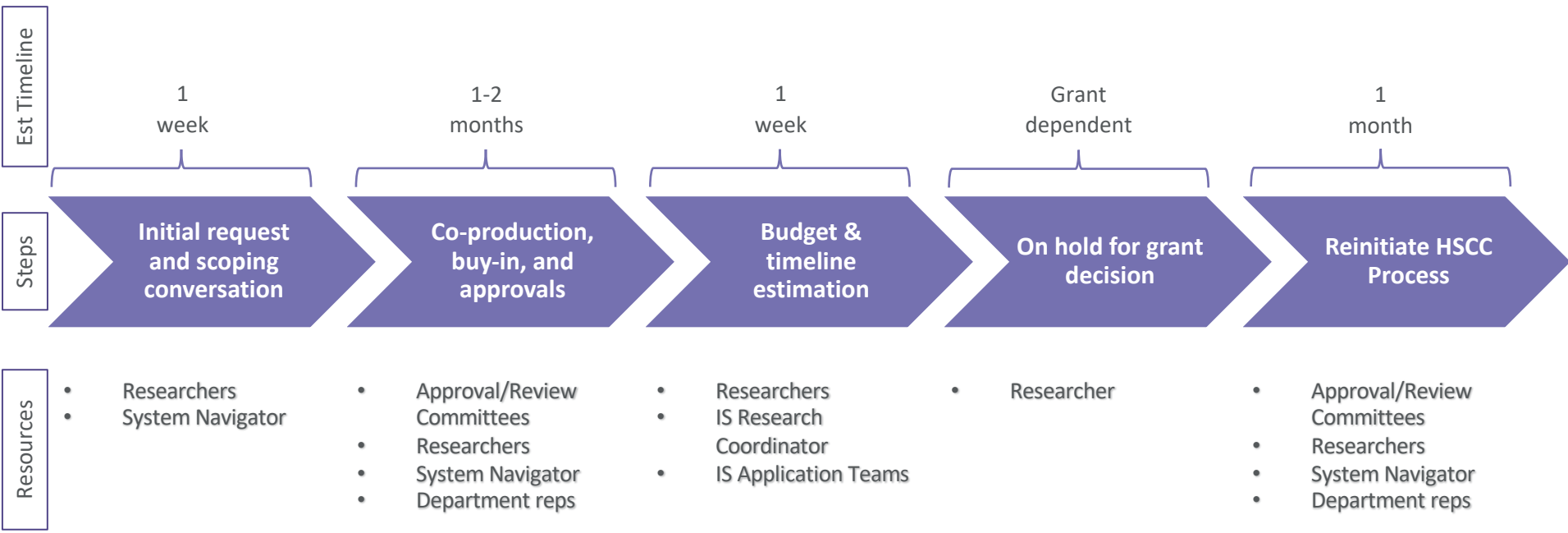
While you wait to find out if the proposal was funded, the request will be on hold. As soon as you hear about results, please email research@NM.org to activate post-award process or close the request.

Post-Award

Step 3: Project setup

If your research is funded, reach out to research@NM.org to set up the infrastructure for successful implementation. While clinical and operational buy-in was obtained in the pre-award phase, this early re-engagement will allow for more detailed implementation planning and prioritization of resources to occur to let you hit the ground running.

NM Research Alignment Intake Overview & Timeline



All timelines are estimates

Pre-Award

Goal: Co-production of research proposals with the clinical and operational stakeholders who will be impacted

Step 1: Initial Proposal Review

- Submit a high-level overview of the proposal to research@NM.org. Please see specific questions to consider on the next slide in addition to sending your Specific Aims page.
- A system navigator will reach out to scope your proposal from a clinical, operational, compliance, and IS perspective to then bring in appropriate departments and walk the project through necessary approvals (see flow chart in Slide 5).
- Information Services will have a good understanding of what can or cannot be developed in Epic, current NM best practices for EMR builds, etc. as well as security and application reviews necessary to identify the best tools for your needs
- Information Services will provide a high-level estimate of the work required to complete the proposal for the HSCC to consider when reviewing
- Your navigator will facilitate co-production conversations with clinical and operational leaders across the regions and clinics to be involved

Questions to answer

- What is the problem your proposal aims to solve?
- How do we know there is a problem at NM?
- What is the solution(s) your project proposes?
- Who will the solution/intervention impact?
- Patient populations
 - Departments
 - Regions/Clinics
 - Specific roles (clinical and operational)
- What will success look like at the end of the project?
- When do you expect to begin and end the project?
- What is the role-specific ask from the health system to make this happen?
 - Clinical champions
 - Providers
 - Patients
 - Clinic Administrators and Support Staff
 - Information Services/ Technology support (Epic, MyChart, etc.)

When Are Additional Reviews Needed?

- Additional IS reviews are typically required when implementing a request that is not limited to standard functionality or includes a 3rd party.
- This may include:
 - Sharing of data/images outside of NM/NU
 - Implementation of new application or software
 - Making changes to the electronic medical record or workflow
 - Altering devices
- An NM IS Representative will help guide the request to these reviews, which may include:
 - Health System Clinical Collaboratives (HSCC)
 - Legal/Compliance
 - Disaster Recovery
 - Security
 - Architecture
 - Application Rationalization

Step 2: Presenting at HSCC

Health System Clinical Collaboratives (HSCCs) bring clinicians from across the system together to focus on vetting and prioritizing projects related to a specific clinical specialty

- A system navigator will engage the facilitator of the proper HSCC(s). You will receive a meeting invite from the facilitator or forwarded from the IS Business Relationship Manager (BRM)/ Informatics for either a HSCC preparation meeting, the HSCC meeting, or sometimes both. The IS Research Coordinator will help you understand the HSCC timeline, as meetings typically occur once monthly.
- You should ensure that yourself, any other subject matter experts, and clinical champions are at the meeting to help present the project. (Your BRM/Informatics/Epic application representatives should already be invited)
- During your presentation, you will use an SBAR to provide a brief overview of the ask and allow time for discussions and questions. Please see Appendix for an example
- Documentation of clinical and operational buy-in, via both your system navigator and HSCC approvals as needed, will be submitted to NM Health System leadership to review and provide, when appropriate, a formal Letter of Support to accompany your grant submission. (See flow chart Slide 5)

Note: This HSCC review gets clinical vetting of the proposal design and concept

Post-Award

Goal: Co-production of implementation plan and detailed operationalization of project with the clinical and operational stakeholders who will be impacted

Step 3: Project Setup

- Please reach out to research@NM.org as soon as you get a notice of decision
- While clinical and operational buy-in was obtained in the pre-award phase, this early re-engagement will allow for more detailed implementation planning and prioritization of resources to occur to let you hit the ground running
- Your system navigator will help you dive into the details of any IS build requests, re-engage with clinical and operational stakeholders, and present to the HSCC for prioritization of resources

Note: This HSCC review allocates and prioritizes resources of system-level functions. This HSCC review also may require modifications if the proposed intervention conflicts with workflows or inhibits optimal standard of care practices.

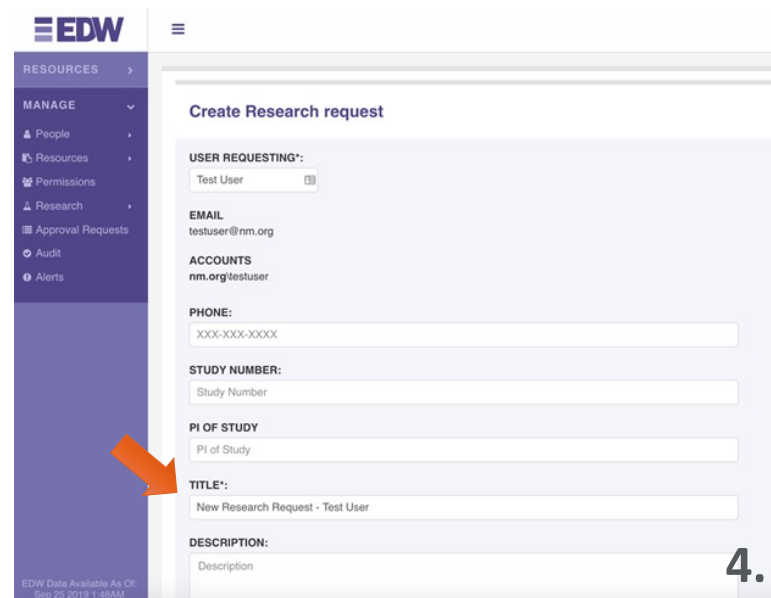
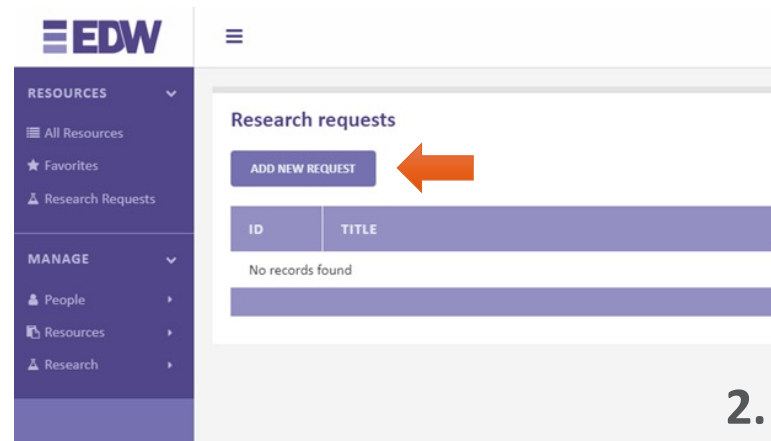
Research Data Requests

All requests to use data for research purposes should follow the EDW Research Portal Request Process to secure necessary approvals

Securing Data for Research

The EDW Portal Process gathers data steward approval and DUA

1. Log into the EDW App with NMHC or NU account [here](#)
2. Click Resources > Research Requests > Add New Request
3. For requesting research data, please type "New Research Request - 'Name_of_User'" in the title box
4. Complete a summary of your request and data elements needed (Gender, Age, IRID, etc.)
5. Please allow 1-2 weeks for decision



Imaging Data Requests

IS Research Coordinator will guide your request to the proper solution depending on image type and landing point

- Request a report through [The EDW Portal Process](#) - This will grant data steward approval for the use and release of images from NMHC for research purposes
 - Even if the data does not live in the EDW, the request must be logged in the portal
- Once approved, IS Research Coordinator will review request and set review meeting with imaging SME's to route the request to the proper solution
- Will the images be stored/transferred internally (NM – NM) or is a 3rd party involved?
 - If 3rd party transfer, additional documentation/approvals may be necessary
- Depending on scope of request, volume of images, and 3rd party involvement, process lifespan is \approx 1-2 months

MyChart Recruitment for Research

Requests to leverage MyChart for participant recruitment should follow this process to ensure timely completion and that patient communication preferences are respected

Research Recruitment Through MyChart

If you wish to recruit participants through Epic MyChart, your request will require additional review



Submit a request form: [Recruitment Via EHR Form](#)



Review occurs monthly. The research team will be notified of approval.



If you have not already requested a report for recruitment, follow the EDW Portal Request Process highlighted in previous slides



Post approval, a 30 min design meeting will be set with NM and NU IT to understand requirements and create an implementation plan.



After design review, build will begin. About 15 hours of total work + variable maintenance will be required to bring the recruitment to go-live. Cost for NM IS Service: \$1,046



Allow anywhere from 3 weeks – 2 months from submission to go-live, depending on timing and requirements