

EPIC Training

Requesting Study Monitor Access to EpicCare Link

Epic Tip Sheets | Research

Published: 6/5/26

This Tip Sheet will walk an external research monitor through the process of requesting access to an Epic research study or studies to access study participant records in the UW Medicine / Fred Hutch instance of Epic via the EpicCare Link web portal.

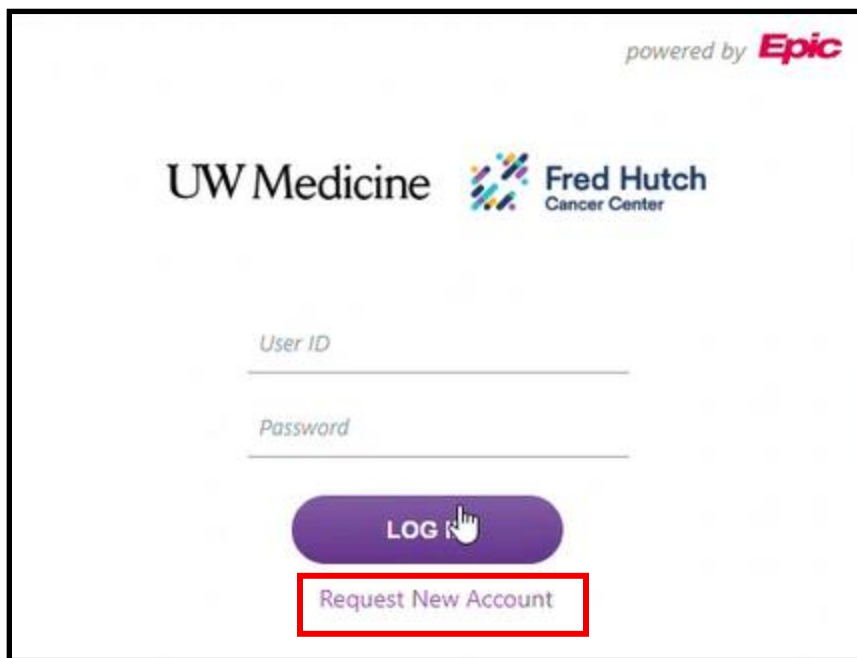


If you already have a user account, check the [commonly asked questions](#) section. If you have further questions, email researchit@uw.edu.

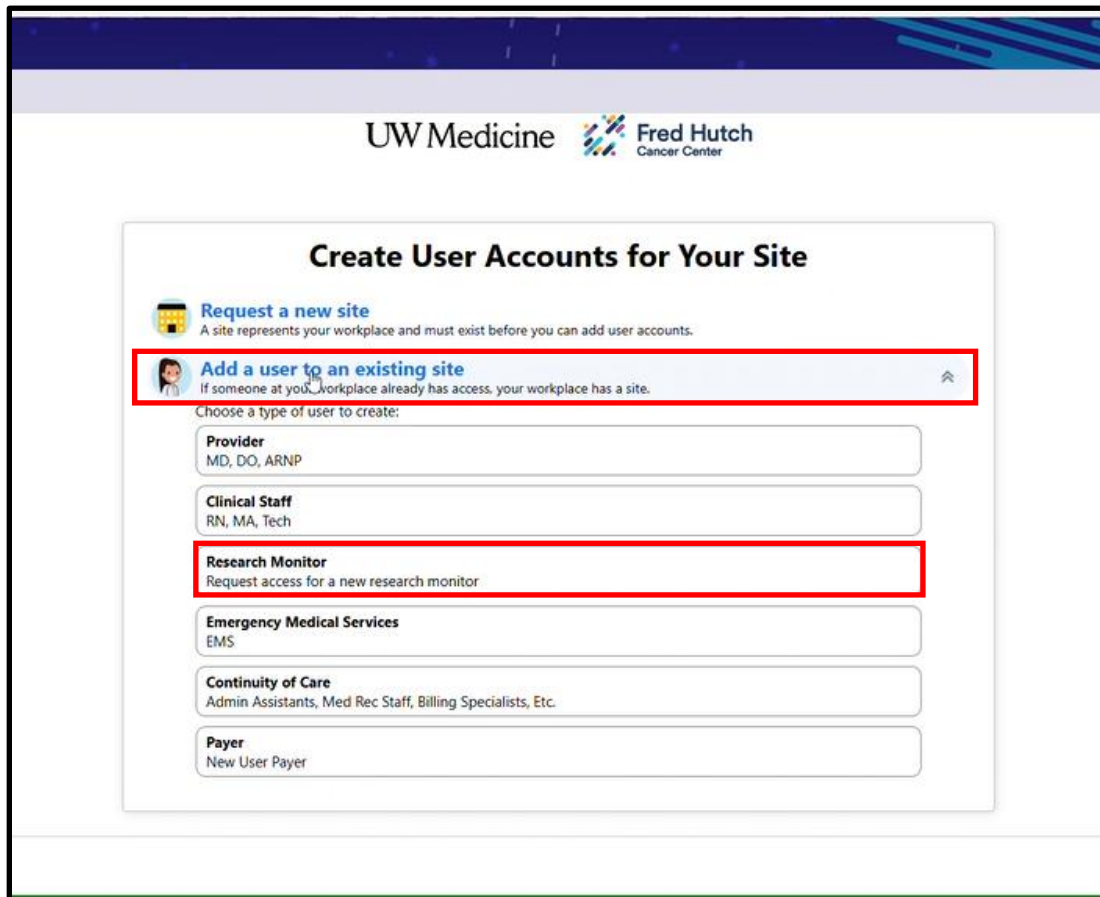


Requesting Access to a Study Via EpicCare Link

1. **Access the EpicCare Link User Account portal:** [Access Request to UW Medicine/FHCC Patient Data for Research Purposes](#).
2. Below the purple *Log In* button, **click the “Request New Account” link.**



3. Under the “Add a user to an existing site” dropdown menu, **select the “Research Monitor” option** in the request form.



4. **Enter the requester details.** Fields with a red exclamation point are required. Please complete the fields for:
 - a. **Name**, first and last
 - b. **Email**, using your work email address (verification will be sent here)
 - c. **Date of Birth** (for identification purposes)
 - d. **Work Phone**, using the best contact number to reach you regarding your work within the UW Epic system
 - e. Full name(s) of **study team contact person(s)** for each study you are monitoring at UW or Fred Hutch
 - f. **Study team contact email** addresses for each study you are monitoring
 - g. Enter the **earliest date** you are requesting releases to review
 - h. Provide the **RG number(s)** for the study or studies
 - i. Enter your **preferred ID** information (such as your driver's license number, passport number, or Employee ID)
 - j. In the **Comments** field, please enter the ID type for the number you entered in the **preferred ID** field.
 - i. If you entered a state driver's license, specify what state issued the driver's license (e.g. Driver's License ID – MI)

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Other	
Preferred ID:	<input type="text" value="MI1234456788"/>
Comments:	<input type="text" value="Michigan Drivers License"/>

- ii. If you entered a passport ID, enter the country that issued the passport (e.g. United States passport)

Other	
Preferred ID:	<input type="text" value="B123456789"/>
Comments:	<input type="text" value="United States Passport"/>

To protect patient privacy and comply with institutional and regulatory requirements, all external research monitors requesting access to Epic must complete identity verification. Please provide one of the following identifiers:


- Driver’s license number and issuing state
- Passport number and issuing country
- Employer-issued identification number

	This information is used only to verify your identity and manage Epic account access. It is stored securely, accessed only by authorized personnel, and is not shared with study teams or used for research purposes.
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Note: Failure to provide this information will delay or prevent approval of Epic access.


User Information

First name:

 Middle name:

Last name:

Work email:

Date of birth: 

Basic Information

Work phone:


NEW ACCOUNT REQUEST - RESEARCH MONITOR

Sponsor you are representing

Full name of primary study team contact at UW or Fred Hutch

[Add](#)

Study Contact Email

Please enter the earliest date for which you will be requesting record releases to review. 


To ensure you have access to the correct study, please provide the RG number for the study


Other

Preferred ID:



Comments:


- At the bottom of the form, **read the Terms and Conditions** and **check the box** to agree to the terms.

 Terms and Conditions: **Privacy, Confidentiality, and Information Security Acknowledgement**

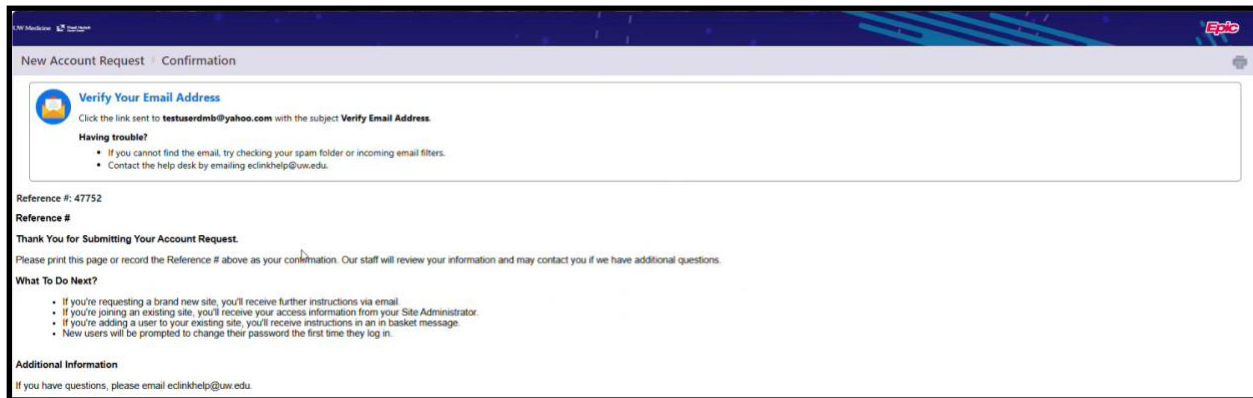
 UW Medicine has a legal and ethical responsibility to safeguard the privacy of all patients and protect the confidentiality of their protected health information (PHI). Federal and state laws and regulations govern the privacy of our patients and their health information. In the execution of services by the organization, I will or may see patients with a variety

I agree to the Terms and Conditions above.

 Verification: I'm not a robot 

 Requested by:

- Complete the **reCAPTCHA verification** checkbox and **enter your name** as the requester in the *Requested By* field.
- Click the **"Submit Request"** button at the bottom of the form.
- You will see a confirmation screen appear. Check your email for further instructions.

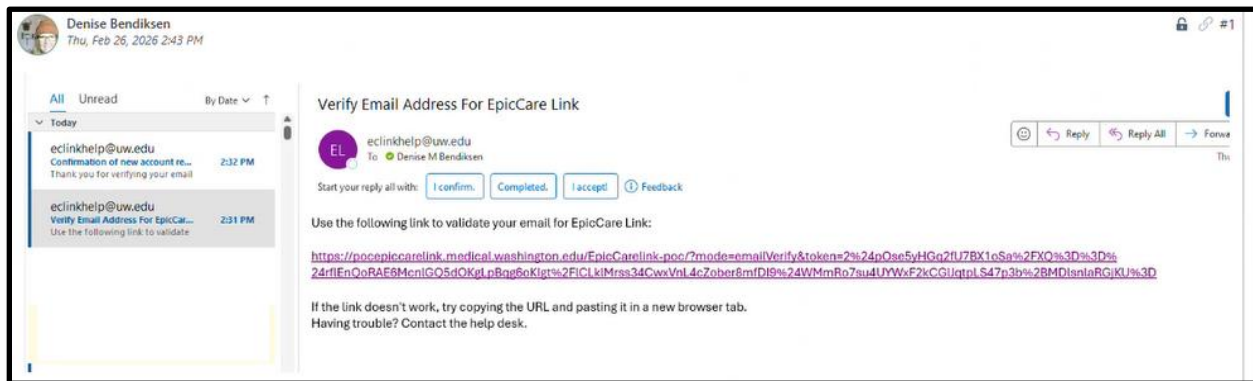


Email Verification

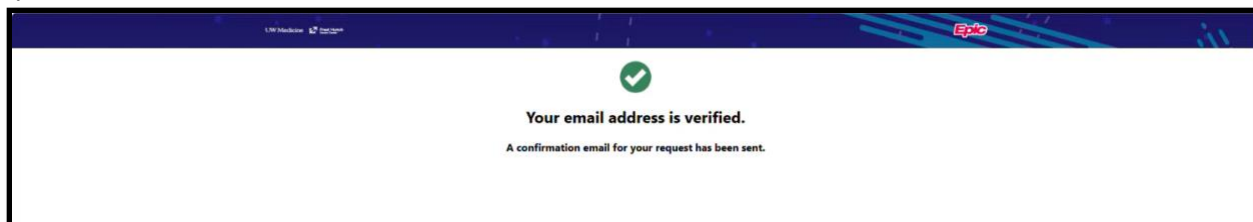
Before your request is routed for review and approval, you must first verify your email address.

1. You will receive an email to verify your email for EpicCare Link. **Click the link or copy and paste it into your browser** to validate your email account.

Note: If you do not receive this email within 5 minutes you will need to submit a new request.



2. After verifying your email via the link, the message below will be displayed, and another email will be sent verifying your email confirmation.



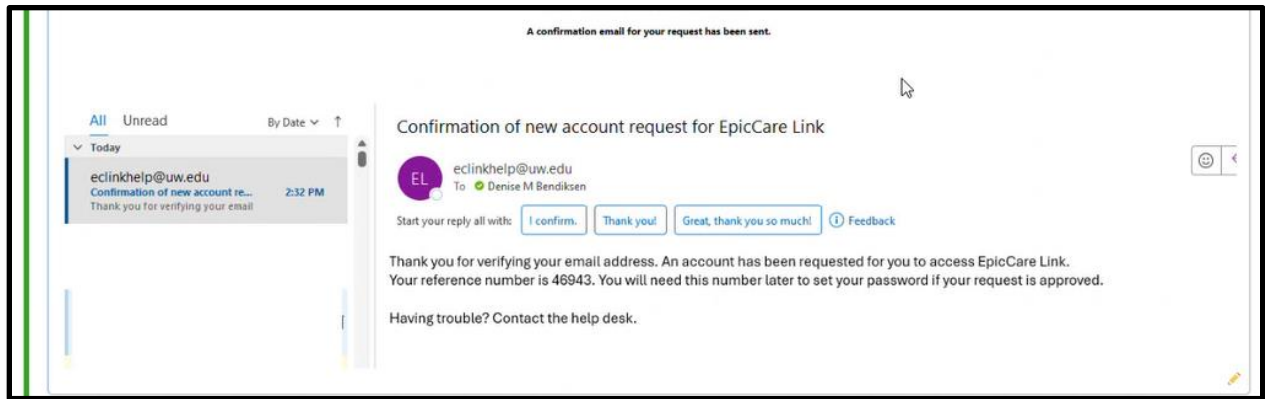
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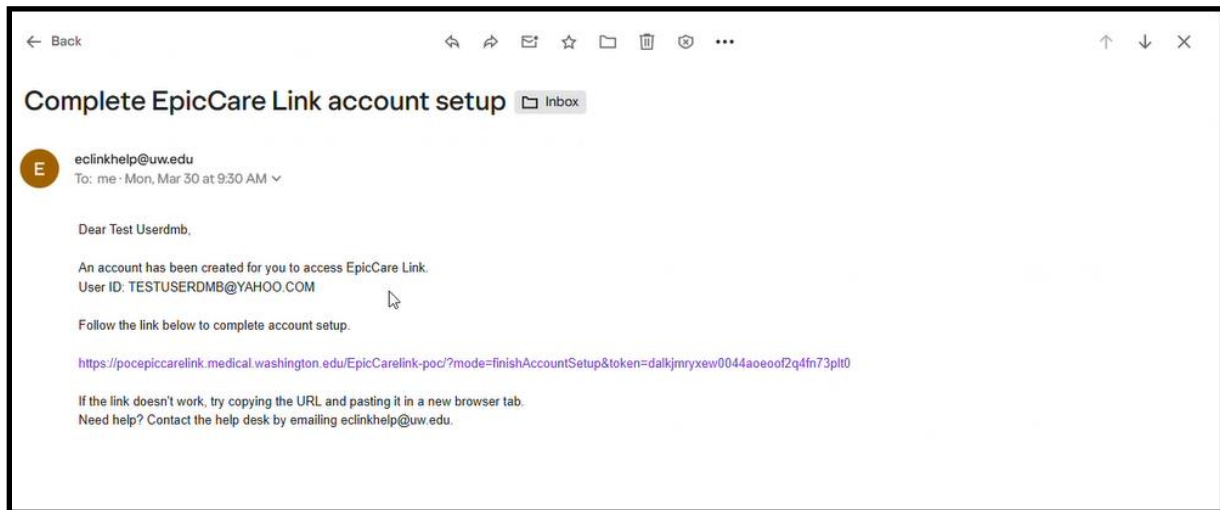
3. Verification email - **Write down or save** the reference number in the verification email. You will use this reference number later to set your password.



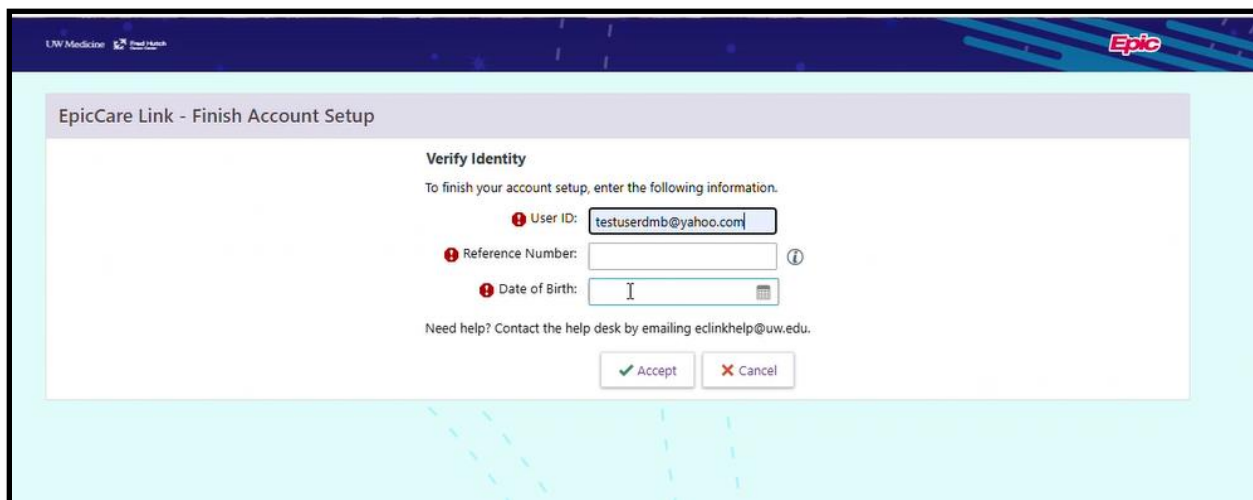
Your submission will be reviewed by UW Medicine Research IT, and an [EpicCare Link](#) account will be created once your request is approved.

Activating Your EpicCare Link Account

After your request is approved, your login information and an initial password will be emailed with instructions for completing your account setup so that you can login to EpicCare Link.



1. Click on the **hyperlink** in the account setup email
2. Enter the **User ID** provided by account setup email
3. Enter the **reference number** from the confirmation email you received after verifying your email.
Note: If you have lost this email and/or reference number, you will need to email eclickhelp@uw.edu to have the reference number resent.
4. Enter your **Date of Birth**
Note: This is used to verify your identity. If you entered your DOB incorrectly during your initial registration you will need to email eclickhelp@uw.edu to correct this in Epic.



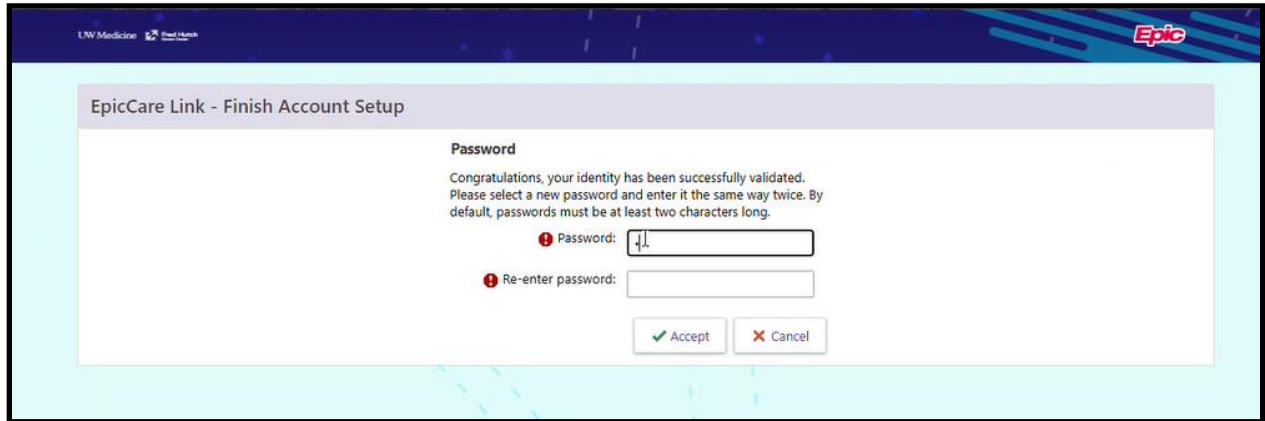
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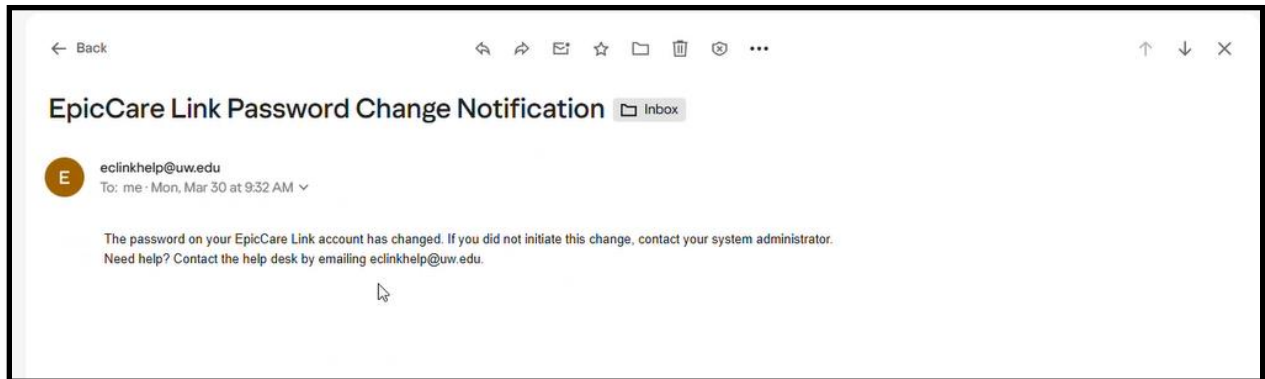
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5. Create your login password. Password requirements are:
 - a. Must contain 12-64 characters
 - b. Must include letters and numbers and may include special characters and spaces
6. Click 'Accept' to save your password.



7. You will receive an email confirming a successful password change.



First Login Setup

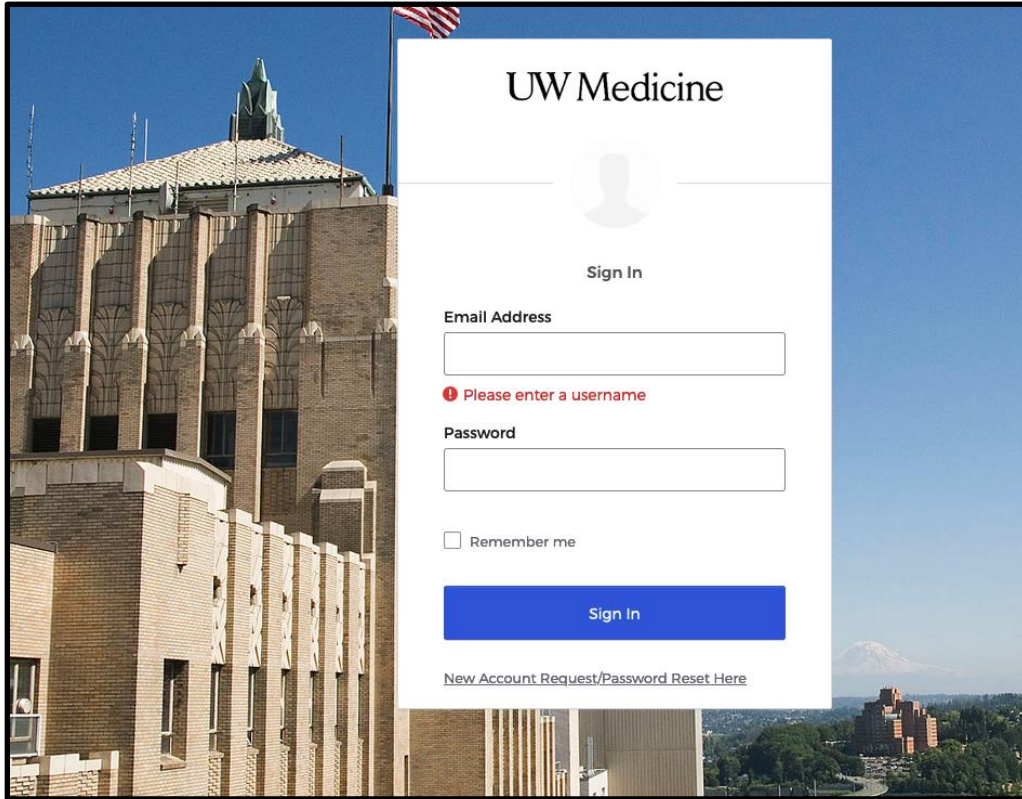
1. Login to EpicCare Link from: <https://epiccarelink.medical.washington.edu/EpicCareLink/>

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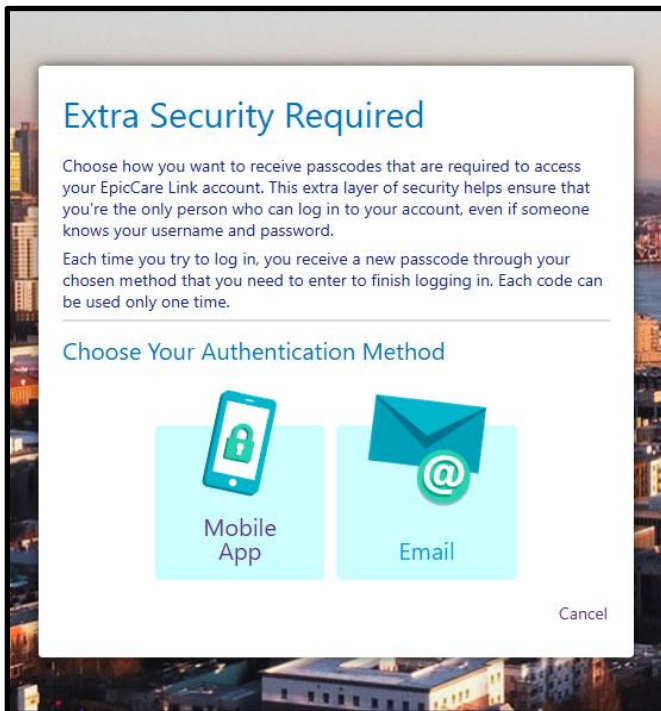
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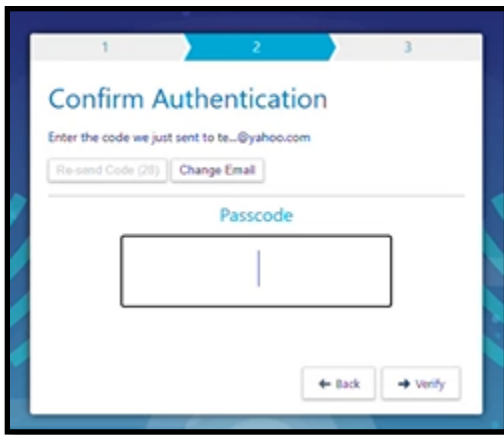
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2. When you login for the first time, you will be required to set up 2-factor authentication. **Choose one of two methods to authenticate your login.** This setting will be retained for future logins.



3. Enter the passcode that has been provided via your chosen 2FA authentication method.



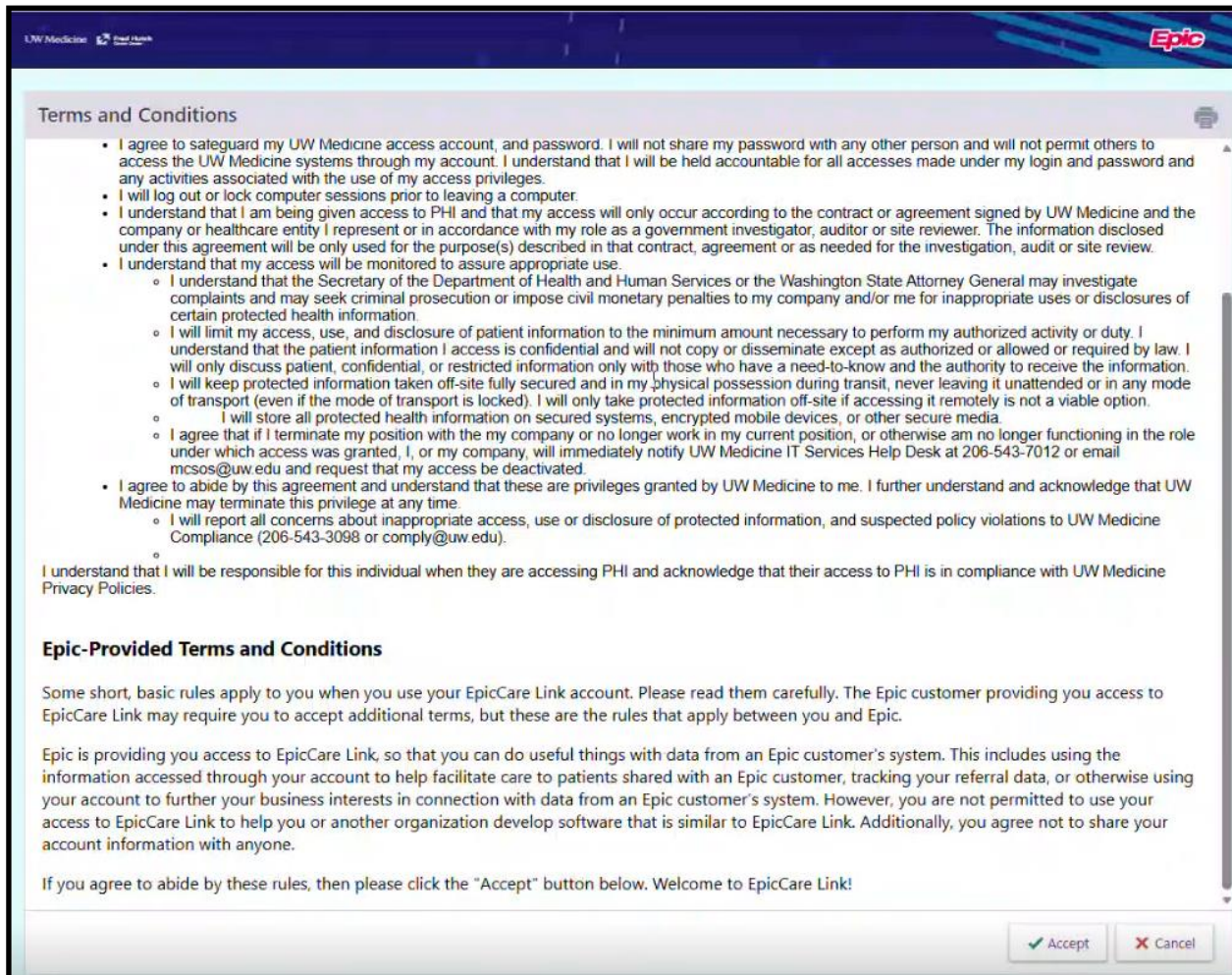
4. Write down the code provided on the screen. You will need to retain this code in the event you need to reset your password in the future.

Note: If you lose this code and need to reset your password you will need to email eclinkhelp@uw.edu for assistance.



5. Click 'Accept' to accept the system terms and conditions.

i It is a requirement that external users accept these terms and conditions to access EpicCare Link, there are no exceptions.



The screenshot shows a web browser window displaying the 'Terms and Conditions' for EpicCare Link. The page header includes 'UW Medicine' and 'Epic'. The main content area is titled 'Terms and Conditions' and contains a list of bullet points detailing the user's responsibilities and the system's monitoring. At the bottom, there are 'Accept' and 'Cancel' buttons.

Terms and Conditions

- I agree to safeguard my UW Medicine access account, and password. I will not share my password with any other person and will not permit others to access the UW Medicine systems through my account. I understand that I will be held accountable for all accesses made under my login and password and any activities associated with the use of my access privileges.
- I will log out or lock computer sessions prior to leaving a computer.
- I understand that I am being given access to PHI and that my access will only occur according to the contract or agreement signed by UW Medicine and the company or healthcare entity I represent or in accordance with my role as a government investigator, auditor or site reviewer. The information disclosed under this agreement will be only used for the purpose(s) described in that contract, agreement or as needed for the investigation, audit or site review.
- I understand that my access will be monitored to assure appropriate use.
 - I understand that the Secretary of the Department of Health and Human Services or the Washington State Attorney General may investigate complaints and may seek criminal prosecution or impose civil monetary penalties to my company and/or me for inappropriate uses or disclosures of certain protected health information
 - I will limit my access, use, and disclosure of patient information to the minimum amount necessary to perform my authorized activity or duty. I understand that the patient information I access is confidential and will not copy or disseminate except as authorized or allowed or required by law. I will only discuss patient, confidential, or restricted information only with those who have a need-to-know and the authority to receive the information.
 - I will keep protected information taken off-site fully secured and in my physical possession during transit, never leaving it unattended or in any mode of transport (even if the mode of transport is locked). I will only take protected information off-site if accessing it remotely is not a viable option.
 - I will store all protected health information on secured systems, encrypted mobile devices, or other secure media.
 - I agree that if I terminate my position with the my company or no longer work in my current position, or otherwise am no longer functioning in the role under which access was granted, I, or my company, will immediately notify UW Medicine IT Services Help Desk at 206-543-7012 or email mcsos@uw.edu and request that my access be deactivated.
- I agree to abide by this agreement and understand that these are privileges granted by UW Medicine to me. I further understand and acknowledge that UW Medicine may terminate this privilege at any time.
 - I will report all concerns about inappropriate access, use or disclosure of protected information, and suspected policy violations to UW Medicine Compliance (206-543-3098 or comply@uw.edu).

I understand that I will be responsible for this individual when they are accessing PHI and acknowledge that their access to PHI is in compliance with UW Medicine Privacy Policies.

Epic-Provided Terms and Conditions

Some short, basic rules apply to you when you use your EpicCare Link account. Please read them carefully. The Epic customer providing you access to EpicCare Link may require you to accept additional terms, but these are the rules that apply between you and Epic.

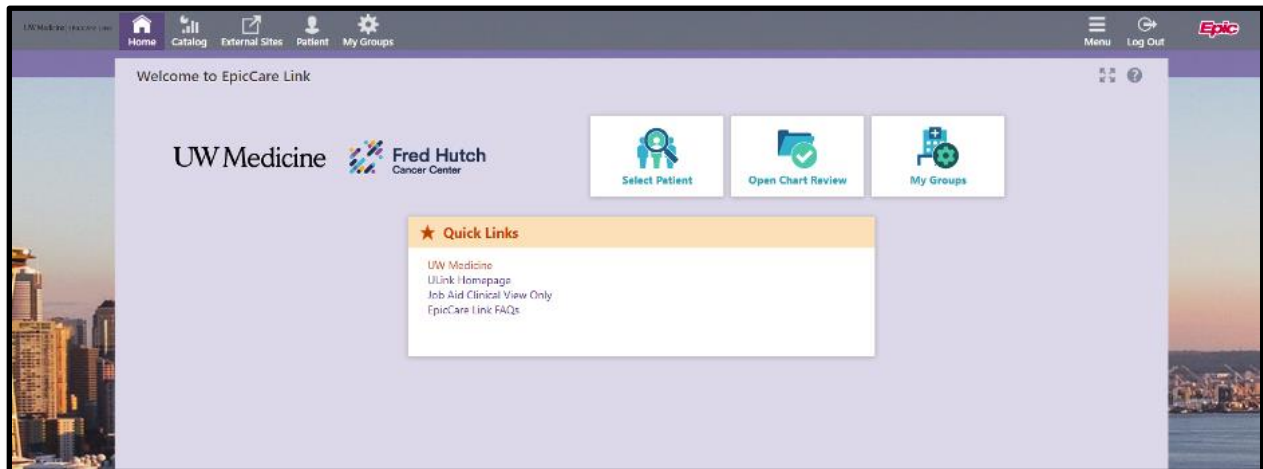
Epic is providing you access to EpicCare Link, so that you can do useful things with data from an Epic customer's system. This includes using the information accessed through your account to help facilitate care to patients shared with an Epic customer, tracking your referral data, or otherwise using your account to further your business interests in connection with data from an Epic customer's system. However, you are not permitted to use your access to EpicCare Link to help you or another organization develop software that is similar to EpicCare Link. Additionally, you agree not to share your account information with anyone.

If you agree to abide by these rules, then please click the "Accept" button below. Welcome to EpicCare Link!



Accessing Study Participant Records

1. After logging in to EpicCare Link, you can **select a specific patient, or open *Chart Review***.



2. **Enter a patient name or select one from the list of patients** that have been released for your review. The Patient SnapShot screen will show you an overview of the selected patient's information. Click on Chart Review or the other tabs at the top of the chart to see more information.



Commonly Asked Questions & Answers

1. **How long will my username and password be active?**
 - Your username and password will remain active for up to one (1) year unless extended based on continued need. Study monitor accounts will be terminated 1 year from the last login or 5 years from the original account activation. Study monitors will receive an email 2 weeks before access termination with a link to allow extending access.
2. **What happens when my access expires or gets deactivated?**
 - Submit a new account request at <https://epiccarelink.medical.washington.edu/EpicCareLink/>
3. **What do I do if my name changes?**
 - Email researchit@uw.edu for assistance
4. **What do I do if my email changes?**
 - If your email changes because you changed organizations, you will need to submit a new access request via the EpicCare Link home page
 - If your email changes because your last name changed you may email researchit@uw.edu for assistance
5. **What if I cannot log into EpicCare Link?**
 - **If you have forgotten your password**, use the New Account Request/Password Reset link beneath the Sign In button to reset your password.
 - **For all other issues**, please contact the UW Research IT department and UW Medicine ITS by emailing researchit@uw.edu.

6. I am a monitor supporting multiple studies at UWM / FHCC, how do I gain access to patients enrolled on a different project?

- Email UW Medicine ITS at researchit@uw.edu with the RG code needing to be added to your account.

7. How long will I have access to participant records?

- The study team will set the access dates for the time period of your visit. Access is provided in 24-hour increments - you will have access to the released records starting at 12:00AM on the requested start date and ending at 11:59PM on the requested end date. Access to a released patient can be granted for up to 14 consecutive calendar days at a time.

8. What if I need more time to review participant records?

- If you need additional time, please communicate your need directly to the UW / FHCC study team.

9. If a UW / FHCC study team member makes a change to a participant record after it has been released to me, will I be able to see the change?

- Yes. Your access to participant charts is view-only, however, you are viewing the live patient record and will see any changes made in real time.

10. I have logged in to EpicCare Link but do not see any participant records. Why?

- The UW / FHCC study team has not yet released any participant records to you. Contact the study team to request release of the appropriate participant records.

11. What if I feel there is information missing from the participant record?

- Contact the UW / FHCC study team to report the missing information.

12. Can I print from EpicCare Link?

- No. Screen capture and printing from EpicCare Link are not permitted for study monitoring visits. Printing by research monitors is closely monitored by the Epic Research team and the UW University Compliance Office and can result in the termination of your research monitor access. Please contact the UW / FHCC study team if your work requires copies of medical records.

13. Where can I find help navigating EpicCare Link?

- Click on the question mark (?) at the top right to view general EpicCare Link help and support information. For help with reviewing records created before 3/27/2021, download the [LK Archive for Study Monitors](#) tip sheet.