**REQUEST PROCESS FOR RESEARCH BEACON PROTOCOL AND MEDICATION BUILD IN PENNCHART**

There are three teams in Information Services (IS) responsible for build in PennChart, however, only the PennChart Beacon Team and the PennChart Research Team is responsible for investigational medication build.

* **PennChart Beacon Team** – responsible for building beacon protocols and the investigational medications included in the protocol. \*\*Any questions relating to Beacon build in PennChart should be directed to the PennChart Beacon Team email distribution in outlook.
* **PennChart Research Team** – responsible for building investigational medications ordered as outpatient prescriptions and for admitted patients (where no Beacon treatment plan is involved)
* **PennChart Pharmacy Team** – responsible for all standard of care medication build and the technical build supporting operational pharmacy and dispensing workflows. (Epic’s Willow application)

The following is an overview of the steps to submit requests for Beacon protocol and investigational medication build in PennChart.

**Beacon Protocol and Medication Build Requests**

* All operational logistical discussions between the study team, nursing and pharmacy (including review of the protocol request form by CHPS nursing staff) should occur **prior to** submitting the request forms to the PennChart Beacon Team.
* Beacon protocols are required for any infusion dept. (includes CHPS OP/IP) and inpatient Oncology units (the study team should confirm use of the beacon plan with oncology inpatient staff as not all studies use beacon plans for admitted oncology patients)
* One protocol request form should be submitted **for each arm of the study**. Please click the link below, enter your network username/password to access the IS Service Portal (disregard if already logged into the portal), complete the information by following the on-screen prompts and attach the protocol build request form(s) before clicking submit. All request forms should be attached to the one IS Service Portal ticket. The hyperlink below should also be used to request updates to existing protocols.

[Beacon Protocol Build Request](https://uphsnet.uphs.upenn.edu/athenaselfservice/ServiceCatalog/WebForm/69)

* **One medication build request form should be used for the study (completed and submitted by the pharmacist) – see next bullet point.** Please click the link below, enter your network username/password to access the IS Service Portal (disregard if already logged into the portal), complete the information by following the on-screen prompts and attach **only one medication build request form** before clicking submit. This same hyperlink should be used to request updates to existing investigational medications.

[Beacon or Research Medication Build Request](https://uphsnet.uphs.upenn.edu/athenaselfservice/ServiceCatalog/WebForm/68)

* As a courtesy and to decrease confusion, the Beacon Team will build additional investigational medications needed for a study if they are ordered outside of the Beacon treatment plan as an outpatient prescription or inpatient (admission encounter) order **provided that a Beacon treatment plan is being used for a portion of the patient’s treatment under the study.** Please submit only one medication request form listing all medications needed to be built in PennChart.

**Beacon Protocol and Medication Review/Approval Process**

1. The Beacon Team will send an extract of the protocol (extract is pulled directly from the build in PennChart) to the study team for review. If edits are needed, they can be requested as tracked comments on the extract or via the email thread. **At this point, the request forms are null/void and only the extract should be referred to.**
2. Once the extract is approved by the study team, the Beacon Team will send the extract and medication screenshots to pharmacy for review. If edits are needed, they can be requested as tracked comments on the extract or via the email thread.
3. Once approved by pharmacy, the Beacon Team will send the extract to the PI for review. If edits are needed, they can be requested as tracked comments on the extract or via the email thread.
4. Once approved by the PI, the Beacon Team will move the protocol and medication build to Production.
5. **PLEASE KEEP THE EMAIL THREAD CONTINUOUS BY REPLYING TO ALL**! This allows everyone to know the status of request and who currently reviewing.