



SCHOOL OF MEDICINE

North Carolina Translational and Clinical Sciences Institute

TriNetX @UNC

Orientation & Supplemental Information

Last updated: October 6, 2025



TriNetX Training Requirements

Training is required to obtain access to TriNetX. Training takes about 1 hour.



Review slide deck



Watch TriNetX 101 Training video (40 minutes)



Complete knowledge check



SCHOOL OF MEDICINE
North Carolina
Translational and
Clinical Sciences
Institute

Section 1: About TriNetX



What is TriNetX?

TriNetX is a self-service data platform designed to support clinical and translational research by allowing researchers to query de-identified patient data across UNC and a collaborative research network. Users can build patient cohorts, estimate study feasibility, and explore disease trends using structured data from EHRs, such as diagnoses, procedures, medications, labs, and demographics. The platform returns aggregate patient counts based on query criteria to assess cohort size and characteristics of study populations.

This platform will replace i2b2@UNC as of September 2025.

Available Networks

You will have access to the **UNC, Research and US** networks. All networks allow you to query for counts and run analytics across a population of patients, but the data within the network and functionalities differs.

	UNC Network	Research Network	US Network
Sites	UNC Health	>100 participating sites	US only HCOs
Size	4.5M+ patients	150M+ patients	132M+ patients
Refresh frequency	Monthly*	Varies	Varies
Ability to search by site	Yes, by UNC department/clinic	No	No
TriNetX Re-ID	Available, with approvals	Not available	Not available
De-ID Export	Not available	Available, with approvals	Not available
Good For	Planning feasibility of studies within UNC; writing queries for re-ID service	Analyses requiring data beyond UNC	Exploring broader patient populations

*Although data is refreshed monthly, there may be a delay before the data becomes available in TriNetX

Available Data

- Dates in UNC data are shifted +/-7 days
- TriNetX terms are standardized across sites.
 - Consequently, users of i2b2 may find that some previously used concepts are no longer available.
- Available domains include demographics, diagnoses, procedures, labs, medications, select vitals, care site
 - Note: UNC data are not available for Oncology or Genomics domains. Oncology and genomic info may still be available through other domains (e.g., diagnoses).



SCHOOL OF MEDICINE
North Carolina
Translational and
Clinical Sciences
Institute

Section 2: TriNetX Functionality



TriNetX 101 Training Video

Please watch the training video linked below.

Once you have completed the video, return to these slides.



[TriNetX 101 Training Webinar: Basic Functionality - Query Building on Vimeo](#)

To open this training video in a new window, please right click on the link and select "Open link in new window"



SCHOOL OF MEDICINE
North Carolina
Translational and
Clinical Sciences
Institute

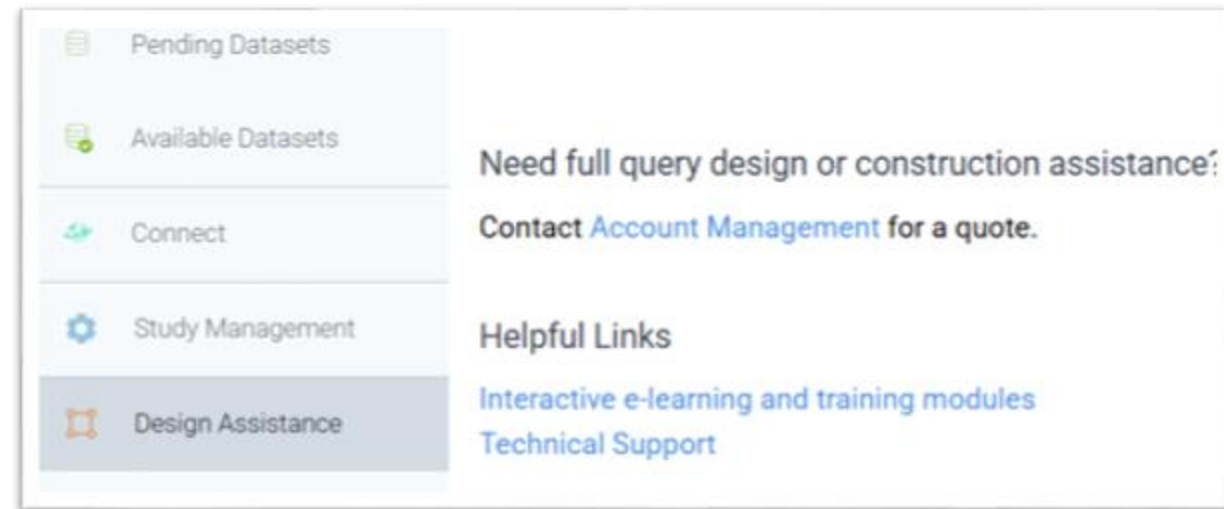
Section 3: Using TriNetX



TriNetX Support

TriNetX offers a limited query assistance service to aid in query design for researchers. Responses from TriNetX should be received in 1 to 2 business days. This service can be found at the bottom of the sidebar menu in the query builder.

TraCS is unable to provide support for query design or TriNetX functionality. TraCS is only able to assist with log in issues.



TriNetX Re-ID Service

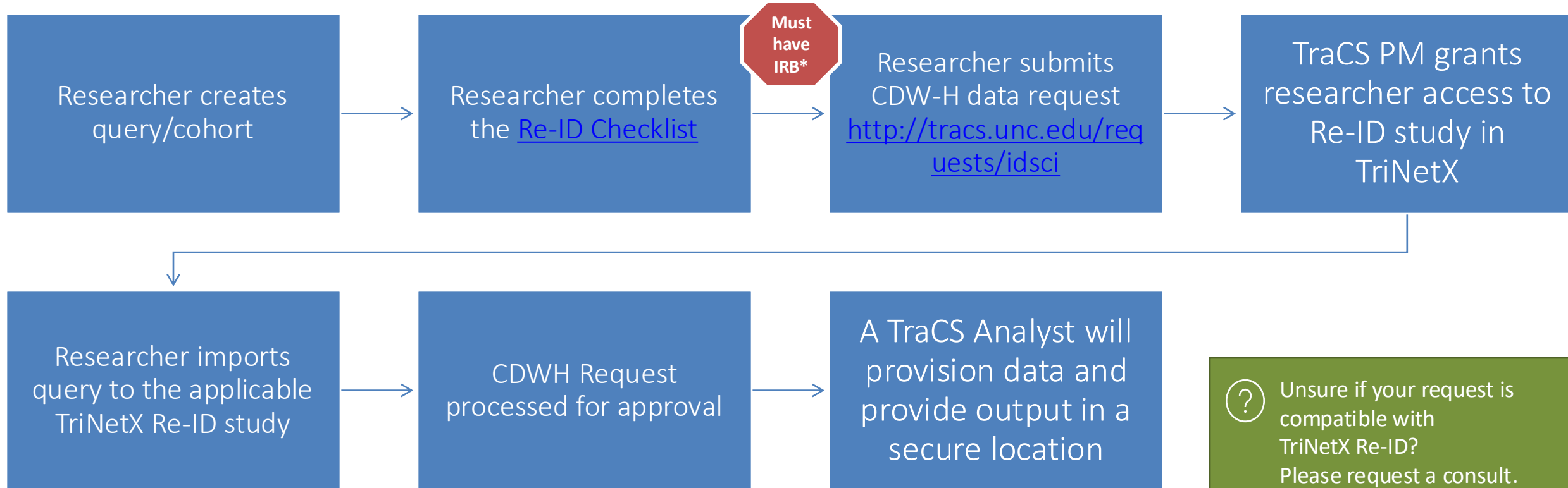
TraCS offers a service in which we can reidentify a patient list created from a query you wrote. You will then receive a patient list and can conduct chart reviews to gather additional data for your study.

Key Things to Know

- Requires an approved IRB, CDW-H data request, and well-written query.
- As of October 2025, TraCS will begin assessing a fee for all re-ID requests received on or after 10/20. A TriNetX re-ID request will take approximately 2-4 hours of staff time to complete. If requesting re-ID of several queries in one request, additional effort may be required. CDWH rates will apply. For current rates, please refer to the following link: <http://tracs.unc.edu/rates>

Read more about requesting a Re-ID <https://tracs.unc.edu/trinetx>

Re-ID Request Process



*An approved IRB is needed to submit a CDWH data request

? Unsure if your request is compatible with TriNetX Re-ID? Please request a consult. <http://tracs.unc.edu/requests/idsci>



Important Terms for Re-ID Study Access



After a request is submitted to CDWH, a project manager will add you to the appropriate study to import the requested query.

- Be sure not to edit queries from other users in the Re-ID Study.
- Unless you have been instructed by a TraCS analyst or PM, please do not edit your query once it has been imported to the Re-ID Study.
- Please do not run new queries in the Re-ID Study.

If any of the above errors or accidents occur, please notify the project manager assigned to your request immediately. DO NOT try to resolve the error by yourself!

TriNetX Research Network Datasets

You may request deidentified datasets from the TriNetX research network to support your work.

Key Things to Know:

- TraCS does not manage these requests. Instead, the researcher will work with TriNetX directly to describe the scope of the project and agree to the terms of use. Study teams are responsible for abiding by those terms.
- TriNetX may charge fees for these datasets.
- Requests for network datasets should be scoped to a specific research question.
- Only paid employees of UNC may request datasets. This includes faculty and staff.

How to Submit a Research Dataset Request

1. Build your query on the Research Network. Follow [these instructions](#) to request a dataset (login required).
2. When sending your request to Procurers, you **must** include the following information, or your request will be rejected.
 - PI Name
 - PI Email Address
 - Your Name
 - Your Email address
 - Project Name

IMPORTANT: The research dataset will be made available to anyone who has access the study under which you have requested the dataset. You are responsible for confirming only authorized users have access to the study. Instructions on managing access to studies is available [here](#) (login required).

How to Submit a Research Dataset Request

3. A TraCS Procurer will send the request to TriNetX.
4. TriNetX will reach out to the contacts you listed to ask questions about the project and have you completed required forms.
5. TriNetX will grant you access to a downloadable dataset within your study in the TriNetX platform.

IMPORTANT: Study teams are responsible for adhering to the Terms of Use for TriNetX datasets.

Because TraCS does not manage the research dataset request process, all questions should be directed to TriNetX at support@trinetx.com.

Additional Policies

Users may not share their TriNetX access or log in info with anyone else.

Abiding by EO 14117

- Use of TriNetX must adhere to Executive Order 14117, Preventing Access to Americans' Bulk Sensitive Personal Data and United States Government-Related Data by Countries of Concern.
- TriNetX users may not be located in a Country of Concern or otherwise qualifies as a Covered Person [as defined by the Executive Order].
- Please reference the Executive Order for further detail.

Ready to Dive Deeper?

The TriNetX training center is accessible after logging in by clicking on the  icon on the top right corner. Advanced training is available for enhanced understanding; users are welcome to take the remaining 102 and 401 trainings.

Note: Some functionalities shown may not be accessible to all users.



SCHOOL OF MEDICINE
North Carolina
Translational and
Clinical Sciences
Institute

Section 4: Requesting Access & Logging In



Requesting User Access

After you complete the quiz, you will be directed to our [TriNetX User Access Request form](#). Please ensure you use your **UNC primary email address** when submitting your request.

How To Find Your Primary UNC Email Address

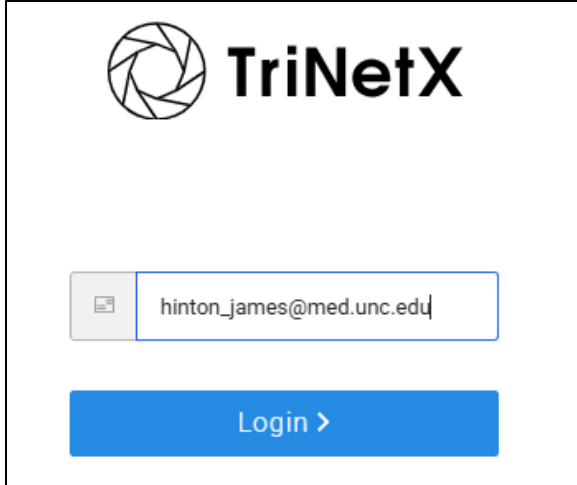
Option 2: Go to selfservice.unc.edu. Under "My Aliases" and identify the row marked (Primary).

Logging In

The log in process can be a bit tricky, so please, follow these steps carefully.

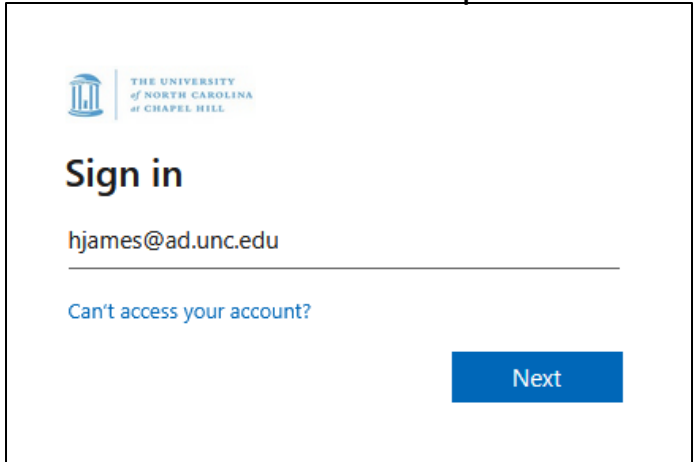
1. Go to live.trinetx.com and enter your primary UNC email address. Once you do, the password field should disappear. Click Login.
2. You will be directed to the UNC Microsoft login page. Log in with your onyen@ad.unc.edu.
3. Once you have successfully logged into your UNC account, you should be redirected to TriNetX.

Screenshot of Step 1



The screenshot shows the TriNetX login interface. At the top left is the TriNetX logo, which consists of a circular camera aperture icon followed by the text "TriNetX". Below the logo is a text input field containing the email address "hinton_james@med.unc.edu". To the left of the input field is a small icon of an envelope. Below the input field is a blue button with the text "Login >" in white.

Screenshot of Step 2



The screenshot shows the UNC Microsoft login page. At the top left is the UNC logo, which includes a small icon of a building and the text "THE UNIVERSITY of NORTH CAROLINA at CHAPEL HILL". Below the logo is the heading "Sign in" in bold. Underneath is a text input field containing the email address "hjames@ad.unc.edu". Below the input field is a blue button with the text "Next" in white. To the left of the button is a link that says "Can't access your account?" in blue text.

Troubleshooting Log In Issues

Issue	Solution
I am redirected to a Microsoft login screen but there is no UNC branding.	Please verify you are using your primary email address. If you are and you are still experiencing this issue, please contact TraCS for support at trinetx@med.unc.edu
I am not redirected to another log in page.	Please verify you are using your primary email address. If you are and you are still experiencing this issue, please contact TraCS for support at trinetx@med.unc.edu
I am using my primary UNC email address, but I am having difficulty logging in	Have you submitted a user request form? If so, and haven't received a confirmation email that you've been added to TriNetX, then your account is still pending approval.

Note: You may experience log in issues if your primary email addresses changes. This can happen if you switch roles or change names. If this is your situation, please notify TraCS.

References and Resources



TriNetX Help Center – Recorded training content, live webinar registration, FAQs. Click the ? Icon in the top right corner within the platform to access.



TriNetX Query Design Assistance – This feature can be found on the bottom of the sidebar menu in the query builder.



TraCS TriNetX Webpage – Find the most up-to-date training slides for future reference and info about TriNetX Re-ID. tracs.unc.edu/trinetx

For support using TriNetX, please contact support@trinetx.com

For access issues, please contact trinetx@med.unc.edu

Knowledge Check

You have reached the end of the training slides. Thank you for your time. Next, complete the Knowledge Check. A score of 80% is required.

<https://redcap.link/unctrinetx101quiz>

Once you have completed the training, you will be directed to the registration form.

Supplementary Content

Please review and refer to the following
slides for additional tips for using
TriNetX.



Query Builder Tips

A query is in draft mode until the [Count Patients] button is ran on your cohort

Be mindful of the AND/OR operator statements! When terms are added to the query builder, AND is the default

TriNetX will pull all related ICD10 child terms when you add a singular parent term to your query *Example: Searching “Diabetes Mellitus” pulls in both Type 1 and Type 2 codes unless you narrow the criteria*

Want only inpatient data? Remember to filter for “Encounter” and select the visit type

Query Builder Tips

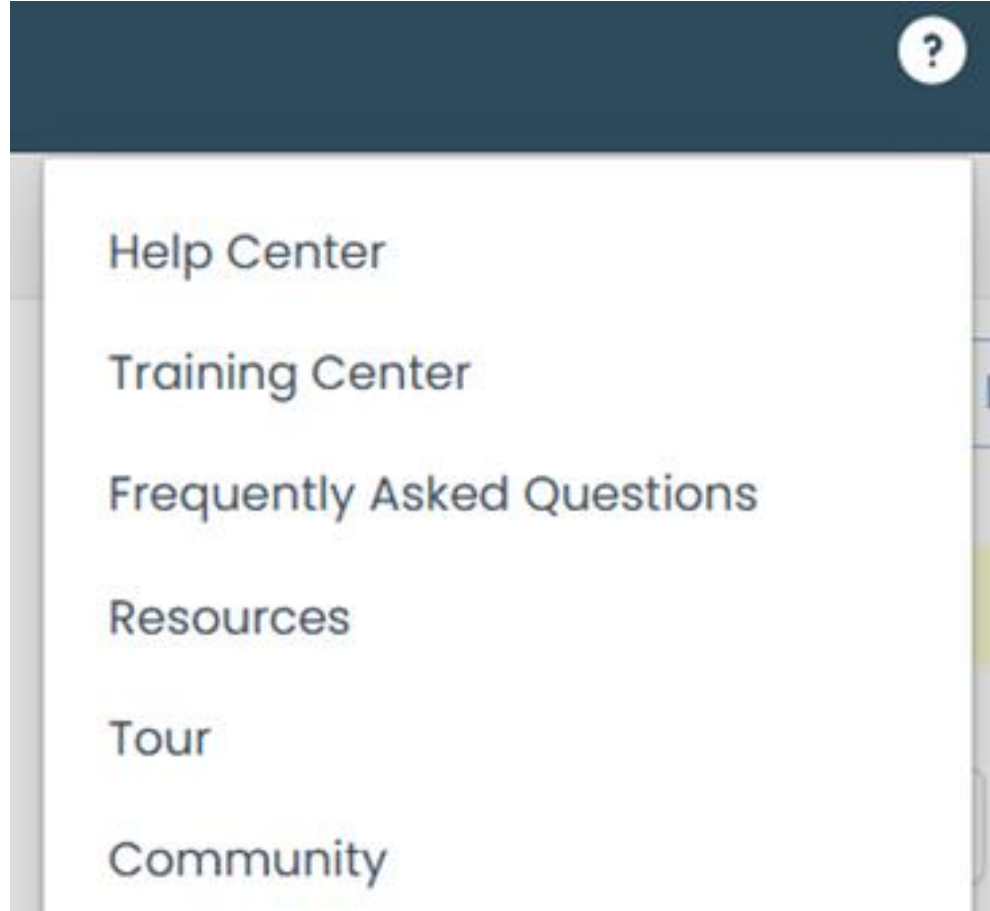
When using the Group Rule "Add Related Group", watch out for the order of events when setting your timeline

To stay organized, use version control when naming and created queries

Use the Explore Cohort tab on the sidebar to review a basic summary of your cohort

Remember the age & sex filter is located above the query builder, race/ethnicity and age at time of event filters can be found within the query builder

Understanding the TriNetX Help Center



Help Center: Main page for all supplemental resources

Training Center: TriNetX hub for webinars and training videos ranging from basics to advanced

FAQ: Defined question and answer pages developed by the TriNetX support team for unanticipated questions or issues

Resources: TriNetX newsletters, upcoming new features and guides

Community: A forum for TriNetX users to ask questions and share lessons learned

Study vs Query

Before building a query in the TriNetX platform, you need to create a 'Study'. For organization, we recommend creating a 'Study' for each IRB you intend to create a query for. You can share your studies with other UNC team members for collaboration and troubleshooting. Queries will be created within the respective study folders and should be named appropriately. Queries will be unnamed by default. CDWH will NOT provision data if your query is unnamed.

How To Share A Study

- 1) Open the study you want to share.
- 2) Navigate to the “Study Management” tab in the left sidebar
- 3) Click on “Team”
- 4) In the top right corner, click the “Share Study” button
- 5) A list of all active UNC TriNetX users will appear.
Select the users you want to share the study with
- 6) Once all team members are selected, click “Save Team”

