

Associating Encounters to a Research Study

Linking Encounters to Research Studies

Linking encounters to their related research studies within Epic is an important piece of the research workflow.

Multiple benefits are provided by linking encounters to their studies-

- Study staff can see a compiled listing of encounters related to their study
- Study staff and clinical providers can more easily identify research-related encounters in Chart Review
- Mixed (study and non-study) visits can be handled within one encounter
- Billing can be accurately handled
- The HIM team can determine which encounters might need additional internal review before releasing



Using the Patients on My Studies-Scheduled Appointments Report to Associate Research Encounters

The **Patients on My Studies - Scheduled Appointments** report allows Research Coordinators to view upcoming appointments and to associate research-related encounters to the study directly from the report.

1. After running the **Patients on My Studies - Scheduled Appointments** report, click on the row of an encounter that has not been associated with a research study.
2. Click the **Link to Study** button.
3. Select the check box next to the study to which the encounter should be linked.
4. Click **Accept**.

Patients on My Studies - Scheduled Appointments [284] as of Fri 9/16/2016 4:08 PM

Filters Options Expand Appts Research Studies Encounter **Link to Study**

Patient	MRN	Date	Time	Department	ProwRes	Status	Type
Renard, Audrey	JH8101747	09/20/2016	8:00 AM	JHOC INTERNAL MED...	CINNAMONBUN, ROB	Sch	FOLLOW UP
Saruman, Audrey	JH5101745	09/20/2016	8:00 AM	JHOC INTERNAL MED...	ROTIPRATA, ROB	Sch	FOLLOW UP
Sauron, Audrey	JH1101744	09/20/2016	8:00 AM	JHOC INTERNAL MED...	SYMIKI, ROB	Sch	FOLLOW UP
Shan-Yu, Audrey	JH5101747	09/20/2016	8:00 AM	JHOC INTERNAL MED...	YOGURT, ROB	Sch	FOLLOW UP
Sharku, Audrey	JH8101744	09/20/2016	8:00 AM	JHOC INTERNAL MED...	KHABEES, ROB	Sch	FOLLOW UP

Link to Study

Linked	Study Code	Study	Status
<input checked="" type="checkbox"/>	CRMS-9998	Drug Sensitivity of ABC Transporter Genes	Enrolled
	Investigator:	Rob Appancake, MD	

Accept Cancel

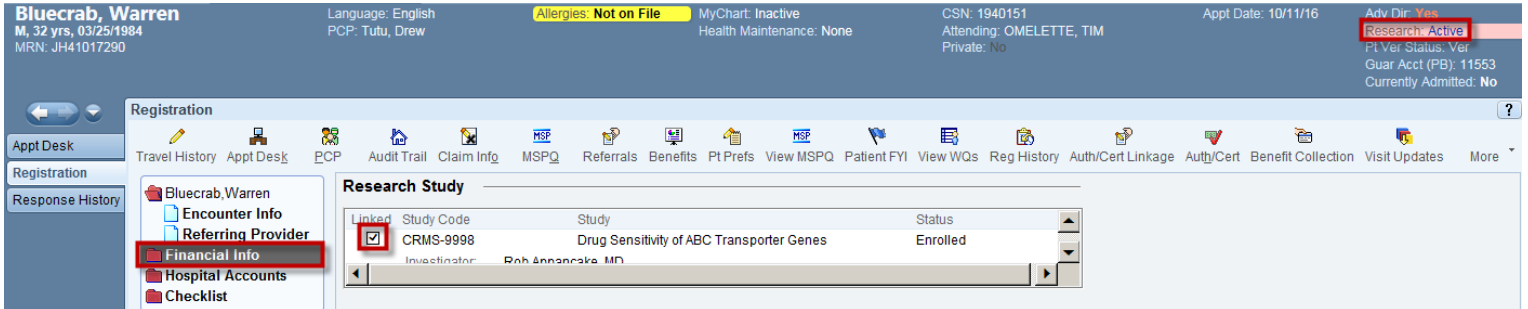


For further details about how to locate, customize, and save reports to your favorites, view the [Research Reports Quick Start Guide](#). Saving this report to your favorites allows quick access to it from the Research Dashboard upon log in.

Associate Research Encounters to Research Studies from Within Registration

The **Financial Info** form within the registration workflow displays a list of the research studies for which a patient is active.

As the patient is being registered and scheduled for a research-related appointment, the Research Study portion of the Financial Info form can be used to link the encounter to the appropriate study.



The screenshot shows the Epic registration workflow for a patient named Bluecrab, Warren. The top navigation bar includes patient information (M, 32 yrs, 03/25/1984, MRN: JH41017290), language (English), PCP (Tutu, Drew), allergies (Not on File), MyChart status (Inactive), health maintenance (None), CSN (1940151), attending physician (OMELETTE, TIM), private status (No), appt date (10/11/16), and a red indicator for **Research: Active**. The left sidebar shows the registration workflow steps: Appt Desk, Registration, and Response History. The main content area displays the **Financial Info** form, which includes a **Research Study** table. The table has columns for **Linked**, **Study Code**, **Study**, and **Status**. A single row is visible with a checked box in the **Linked** column, **CRMS-9998** in the **Study Code** column, **Drug Sensitivity of ABC Transporter Genes** in the **Study** column, and **Enrolled** in the **Status** column. The investigator is listed as **Roh Annasaka, MD**.

Linked	Study Code	Study	Status
<input checked="" type="checkbox"/>	CRMS-9998	Drug Sensitivity of ABC Transporter Genes	Enrolled

Keep in Mind

- Only patients who are active on a research study, as indicated by the Research: Active indicator, will have the option to link the encounter to a study.