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.

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.
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.

### 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.