

Associating Orders to a Research Study

Associating Inpatient and Outpatient Orders to a Research Study

When placing research study-related orders in Epic, it is critical that you associate any orders related to research to the correct study. Orders being associated to a research study can be individually selected to ensure only the research-related orders are associated. This process allows flexibility when not all of the orders are study-related.

In order to be able to associate orders to a research study the patient must be active on the study. If the pink **Research: Active** indicator (see image under step 3) is not displayed on the header the patient is not assigned to a study and the system will not allow orders to be associated to a study.

The steps for associating orders to a research study are similar between outpatient and inpatient ordering workflows but the differences are demonstrated below.



Try It Out – Associating an Inpatient Order to a Research Study

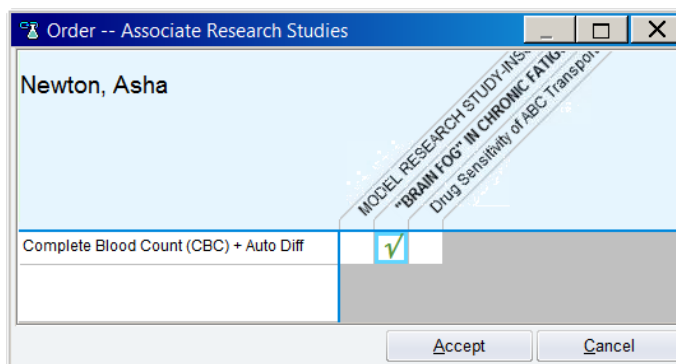
1. Click the **Orders** activity on the left to launch the **Manage Orders** sidebar on the right.
2. Search for the order in the sidebar on the right. In this example, a CBC order is being placed.

The screenshot shows the Epic Orders sidebar. On the left, the 'Orders' activity is selected. The main area displays a list of orders under the 'Scheduled' tab, including ceFAZolin (ANCEF) injection 1 g, morphine 1 mg/mL in sodium chloride 0.9 % 100 mL infusion, and ibuprofen (ADVIL, MOTRIN) tablet 200 mg. On the right, the 'Manage Orders' sidebar is open, and the 'Place new order' button is highlighted with a red box. Below it, a 'New Orders' section shows a 'Complete Blood Count (CBC) + Auto Diff' order with a 'Second sign required' note.

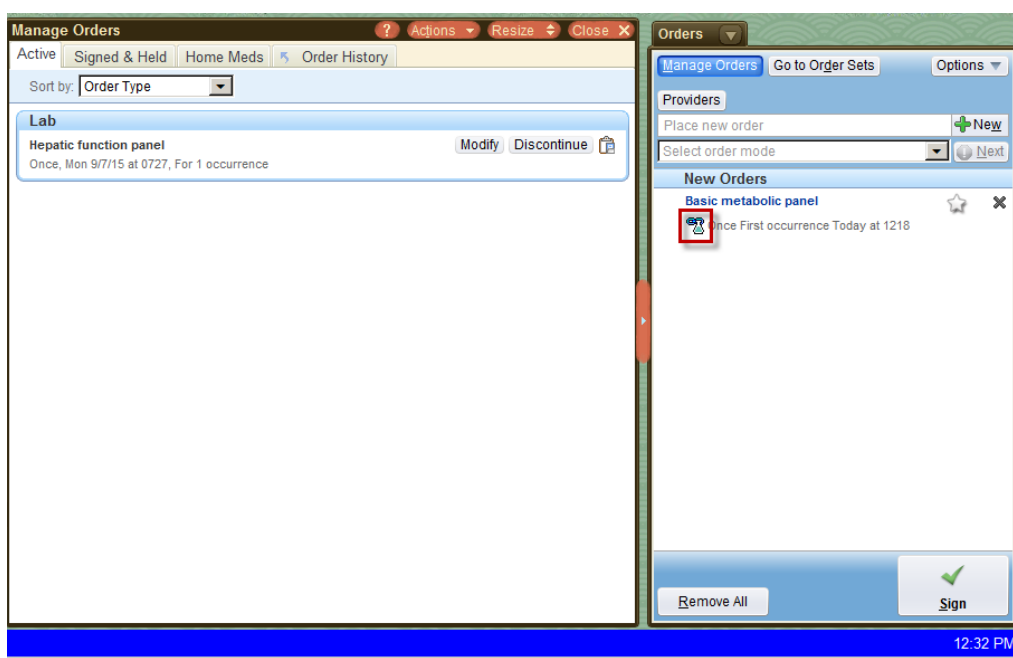
3. Once the order is found and added to the sidebar, the order needs to be associated with a research study. Click the **Options** menu on the right sidebar and select **Research Association**.

The screenshot shows the Epic interface for patient Newton, Asha. The 'Orders' sidebar is open, and the 'Options' menu is expanded. The 'Research Association' option is highlighted with a red box. The patient's 'Research: Active' status is visible in the top right corner.

4. A list of all studies the patient is associated with in Epic will display diagonally across the top. A list of all orders being placed will display on the left. Place a check-mark next to the correct study and click **Accept**.



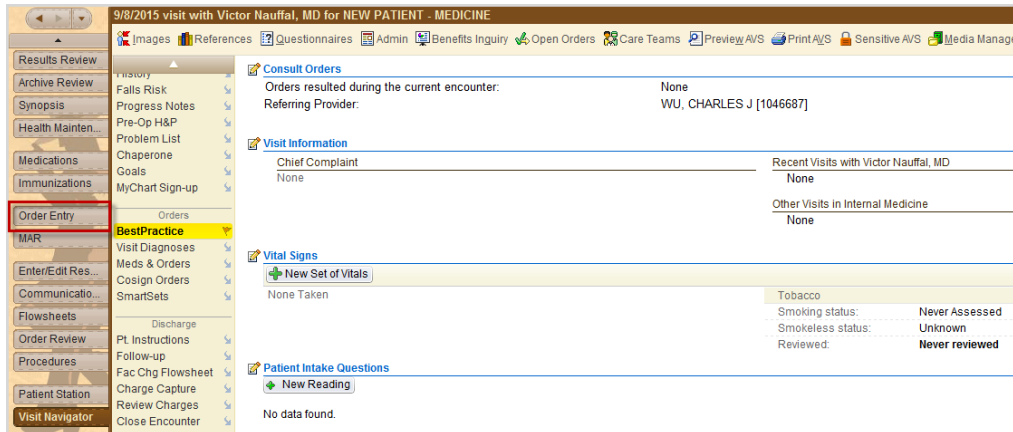
5. Once the order has been associated to a research study the blue flask will appear next to the associated order.



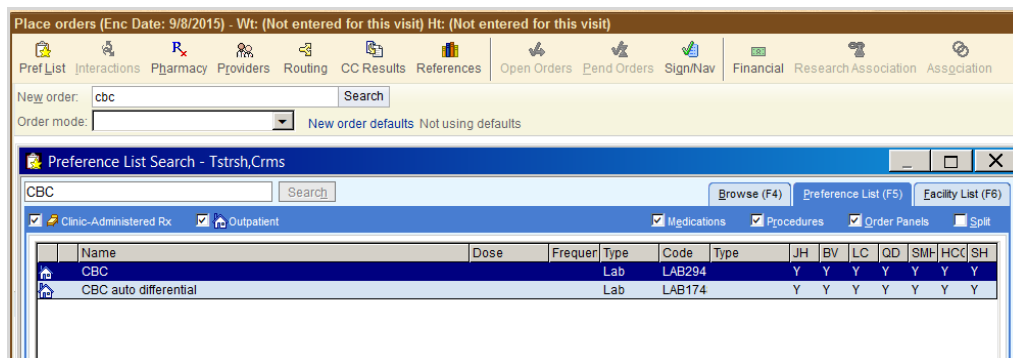
6. Finish placing the order and click **Sign**.

Try It Out – Associating an Outpatient Order to a Research Study

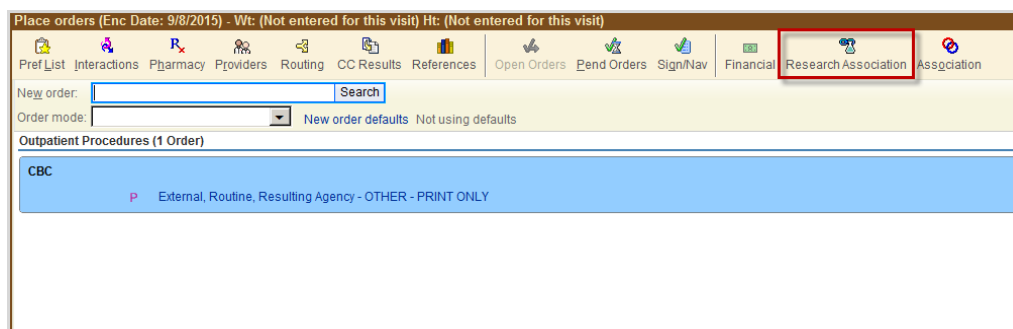
1. Click the **Order Entry** activity on the left to launch the Place Orders window.



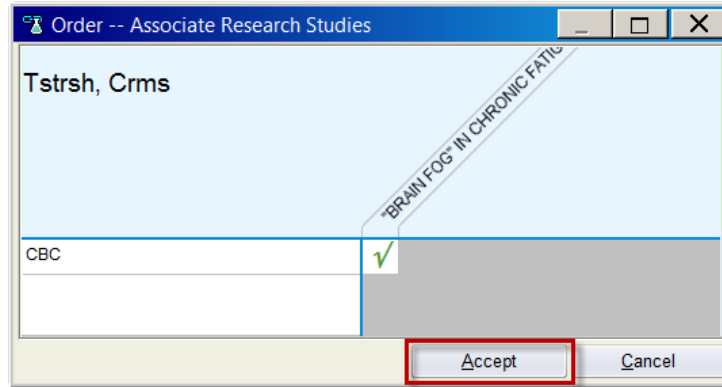
2. Search for your order in the **New Order** field. In this example, a CBC order is being placed. Double-click on the appropriate order from the list provided to select it.



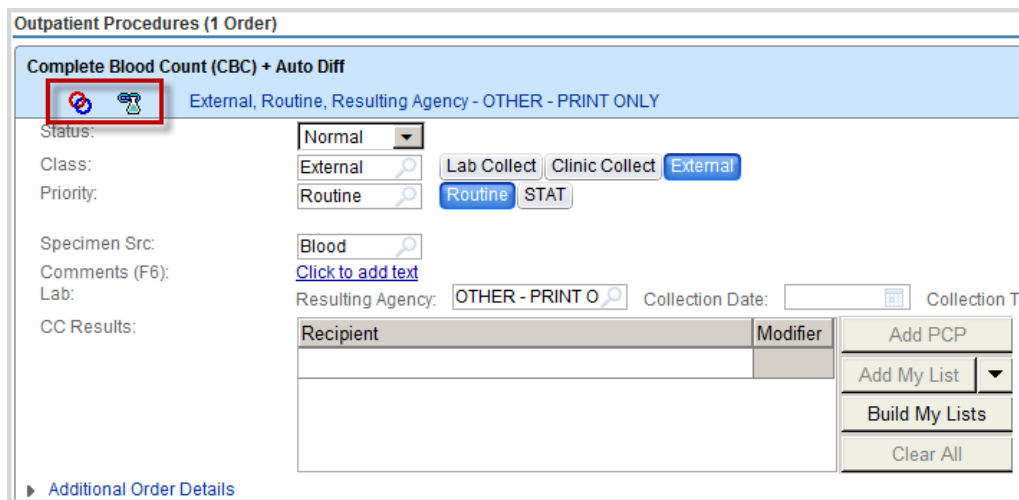
3. Once the order is selected, click the **Research Association** button from the toolbar.



4. A list of all studies the patient is associated with in Epic will display diagonally across the top. A list of all orders being placed will display on the left. Place a check-mark next to the correct study and click **Accept**.



5. Once the order has been associated to a research study the blue flask will appear next to the associated order.
- Note the example below also displays the entwined circles to indicate that the diagnosis is also associated to this order.
 - All outpatient orders must have the diagnosis associated. The button used to associate the diagnosis is located to the right of the Research Association button seen in the previous step 3.





You Can Also...

- If multiple orders are being placed but only a few of them are study-related, only click and select the orders that are related to the study.

Order	MODEL RESEARCH STUDY-INSO...	"BRAIN FOG" IN CHRONIC FATIGU...	Drug Sensitivity of ABC Transporte...
COMPLETE BLOOD COUNT (CBC) + AUTO...	✓		
BASIC METABOLIC PANEL	✓		
HEPATIC FUNCTION PANEL			
GLUCOSE TOLERANCE, 1 HOUR	✓		
THYROID STIMULATING IMMUNOGLOBULIN			
THYROXINE (T4)			

- In circumstances when multiple orders are being placed and they are *all* for a research study, click the name of the study to select all of the orders at once.

Order	MODEL RESEARCH STUDY-INSO...	"BRAIN FOG" IN CHRONIC FATIGU...	Drug Sensitivity of ABC Transporte...
COMPLETE BLOOD COUNT (CBC) + AUTO...	✓		
BASIC METABOLIC PANEL	✓		
HEPATIC FUNCTION PANEL	✓		
GLUCOSE TOLERANCE, 1 HOUR	✓		
THYROID STIMULATING IMMUNOGLOBULIN			
THYROXINE (T4)			

- Remember to look for the pink **Research: Active** indicator in the patient's header. If the indicator is not present, the patient is not associated to a research study. The system will not allow any orders to be associated to the study until the patient has first been associated to the study.