

# **Epic Tipsheet For Study Coordinators -Managing Research patients, Managing Research Visits, and Research Billing Review**

Associate participants with your study.....	2
Review your participant enrollment information.....	2
Link upcoming appointments to your study.....	2
Link upcoming admissions to your study (FOR HCPC).....	3
What if I don't see my study in Epic?.....	3
What if I can't see the study association in the Research Studies activity?.....	3
What do I do if I mistakenly associated the wrong patient with a study? .....	4
Other Research Coordinator Reports that may be helpful to modify and use: .....	4
Research Coordinator Research Billing Review.....	5

## Associate participants with your study

You can associate all your study participants with your study and indicate what their status should be during conversion. After patients are associated with a research study, you can manage their upcoming visits in Epic. The **Find Patients Associated with My Research Studies** report from the Research Reports section of your dashboard will show you a listing of patients on your research study.

1. Click  **Research Studies** on your main toolbar.
2. Look up your patient and click **Accept**.
3. Click  **Add**.
4. Select the appropriate study and click **Accept**.
5. In the **Status** field, enter the appropriate status for the patient, such as Enrolled.
6. Click  **Accept**.

## Review your participant enrollment information

You can review your study participants' enrollment information for accuracy and make updates.

To pull up the **Research Studies** activity for each patient:

1. Click  **Research Studies** on your main toolbar.
2. Look up your patient and click **Accept**.  
Review the study-specific enrollment information for your patient for accuracy.



To generate a list of all patients associated with your study in Epic, run the **Patients Associated with My Studies** report from your Research Reporting Home dashboard. From the results, you can select a patient and click **Research Studies** in the report toolbar to jump to their Research Studies activity. You can use this report to quickly generate a list of patients to review, rather than looking them up via the Research Studies activity individually, but be sure to verify all your patients are appearing in the report as expected before using it as a work list.

## Link upcoming appointments to your study

From your version of the ES Appt Search for Research Coordinators report, you can review upcoming visits for your study participants and verify any study-related visits scheduled for go-live and beyond are appropriately linked to the study.

1. Open **Upcoming Appts for Patients Associated with <Insert Research Study>** Report.
2. On the Criteria tab, in the Research Study Criteria; Replace the study (ID) listed with your study ID.
3. Click/ select Save As at the bottom of the window.
4. In the new report name replace <Insert Research Study> with your study name and Accept.
5. Run your saved report created Above (this report is created from the **ES Appt Search for Research Coordinators** report template).
6. Review the appointments to determine which, if any, are already linked to your study.
7. If an appointment is not linked to your study but should be, select that appointment and click  **Link to Study** on the report toolbar.
8. Select the study to which the appointment should be linked.

9. If this study has a billing protocol, you'll be prompted to link this appointment to a specific day on the patient's timeline.
10. Click **Accept**.

## Link upcoming admissions to your study (FOR HCPC)

This will be done at or immediately after Epic Go-live when patient admission information is available in Epic.

From your version of the report, you can review upcoming planned admissions for your study participants and verify any study-related admissions planned for go-live and beyond are appropriately linked to the study.

1. Open the **Upcoming/Current Admissions for Patients Associated with <Insert Research Study>** Report.
2. Click/ select Save As at the bottom of the window.
3. In the new report name replace <Insert Research Study> with your Study name and Accept.
4. Run your saved version of the **Upcoming/Current Admissions for Study Patients** report.
5. Review the admissions to determine which, if any, are already linked to your study.
6. If an admission or pre-admission is related to your study, select that encounter and click  **Link to Study** on the report toolbar.
7. Select the study to which the admission should be linked.
8. Click **Accept**.

## Frequently Asked Questions:

### What if I don't see my study in Epic?

Your study may not be part of the approved studies selected to be created in Epic. If you think that your study should be in Epic than please contact Sujatha Sridhar with UTH eIRB.

### What if I can't see the study association in the Research Studies activity?

If you do not see a patient-study association when you expect to, try selecting the **Show** checkboxes in the upper right-hand corner of the activity to view statuses that may be filtered out.

### What do I do if I mistakenly associated the wrong patient with a study?

If you accidentally associate a patient with the wrong study, you can delete that enrollment to correct the patient's chart.

1. Click  **Research Studies** on the main toolbar.
2. Search for the patient.

3. Click the link for the erroneous study enrollment.
4. Click **Delete**.
5. In the window that appears, click **Delete** to confirm that you want to remove this patient.



You can view deleted study associations by selecting the **Deleted** check box in the upper-right corner of the Research Studies activity.

## Other Research Coordinator Reports that may be helpful to modify and use:

- <Insert Research Study> Research Studies Status
- Upcoming/Current Linked Admissions for Inactive Patients Associated with <Insert Research Study>
- Find Patients Needing Re-Consent on a <Insert Research Study>
- Incomplete Research Tasks for <Insert Research Study>
- <Insert Research Study> Adverse Events Search

## Research Coordinator Research Billing Review

Clinical studies profiles are entered into Epic to ensure research charges are billed appropriately.

All clinical studies at UTHealth meeting the below two (2) criteria are entered into Epic by a central team.

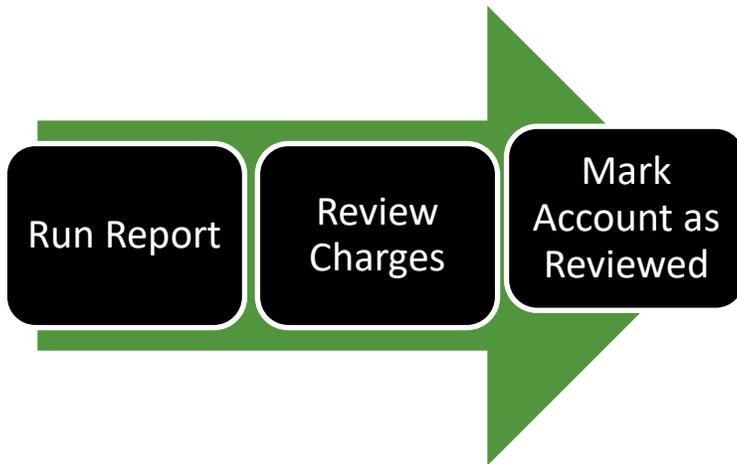
### Criteria for study to be entered into Epic:

1. Study protocol dictates patient care that is performed for research purposes only and should be billed to the research account (not to patient/ patient's insurance.)

and/or

2. Study protocol dictates routine care as part of the clinical study AND the study is a Qualifying Trial per CMS determination guidelines [CMS LINK](#)
  - The study teams are required to associate/link all patients enrolled into the studies entered into Epic.
  - The study teams are required to associate/link all research visit encounters for the studies entered into Epic
  - The study teams are required to review all charges for research visit encounters for dissemination.

## Research Billing Review:



## Find patients needing research billing review:.

- From the Research Coordinator - My Studies dashboard, click the **Total Balance Needing Research**
- After the results load, click the  icon to view the report

It should look like this:

# Workqueue to hold the charges

Charge Review UTH PB - RESEARCH CHARGES NEED BILLING REVIEW [4933] Last refreshed: 3/23/2021 10:27:3...

Refresh Filter Previous Next Edit Defer Transfer Resubmit Force Resubmit Delete Report Go To WQ Maint

Active (Total: 1,591,854,548.00) Deferred (Total: 0)

Status	Svc Date	Patient	Account	Coverage	Billing Provider	Service Provider
M	12/17/2013	ORTHOPAEDIC,BRADLEY E	ORTHOPAEDIC...		RADIOLOGY, R...	RADIOLOGY, R...
M	10/20/2014	ORTHOPAEDIC,BRADLEY E	ORTHOPAEDIC...		RADIOLOGY, R...	RADIOLOGY, R...
M	08/04/2012	ZZIPMASTER,ROSA	ZZIPMASTER,M...	ZZDNU UNITED...	RADIOLOGY, R...	
M	06/04/2015	WELCOME,STEPHANIE	WELCOME,STE...		FAMILY MEDICI...	FAMILY MEDIC
M	05/29/2015	WELCOME,ALYSSA	WELCOME,ALY...		FAMILY MEDICI...	FAMILY MEDIC
M	04/29/2015	LMRTESTING,HERMIONE	LMRTESTING,H...		BEACON, PHYS...	BEACON, OP N
M	04/29/2015	LMRTESTING,JACK	LMRTESTING,J...		KALEIDOSCOP...	KALEIDOSCOP
M	04/29/2015	LMRTESTING,JACK	LMRTESTING,J...		KALEIDOSCOP...	KALEIDOSCOP

- Double-click a patient record in the report results to open the Research Billing Review activity.

## Report to Review Charges

Charges

Research Correction

Non-Study Charges

Billor Rvw	Study Rvw	Svc Date	Post Date	Code	Description	Qty	Amount
<input type="checkbox"/>	<input type="checkbox"/>	01/01/21	01/07/21	1240000001	HC SEM-PRIVATE PSYCH ROOM DAILY	1	800.00
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/02/21	01/07/21	1240000001	HC SEM-PRIVATE PSYCH ROOM DAILY	1	800.00
<input type="checkbox"/>	<input checked="" type="checkbox"/>	01/03/21	01/07/21	1240000001	HC SEM-PRIVATE PSYCH ROOM DAILY	1	800.00

Encounters

Review History

Last reviewed: 02/11/21 11:11 AM by Tom Leonard

Charges

Encounters

Review History

Last reviewed: 02/11/21 11:11 AM by Tom Leonard

Charges

Research Correction

Study-Related - Bill to Study

Billor Rvw	Study Rvw	Svc Date	Post Date	Code	Description	Qty	Amount
<input checked="" type="checkbox"/>	<input type="checkbox"/>	02/01/21		90870 (CPT8)	PR ELECTROCONVULSIVE THERAPY,1 SEIZ	1	350.00

Mark Service Date as Reviewed

Mark service date as reviewed

- Transfer a charge from Research Billing Queue to either the study account or to the patient's account

The following buckets of charges appear in the Research Billing Review activity:

1. Study-Related - Bill to Study

2. Study-Related - Bill to Insurance/Patient
3. Non-study Charges

In the Research Billing Review activity, verify that the patient's research visit charges are correctly disemiated.

### If errors are noted, Use “Research Correction”

During your review, you can transfer a charge from one bucket to another if the charge is listed incorrectly. For example, if a patient comes in for a study-related visit and also receives a flu shot, the flu shot might be incorrectly listed as a study-related charge. In this case you would:

1. Select the check box next to one or more transactions and click **Research Correction**.
2. Indicate whether the charges are Research-Related, and enter the correct information.
3. When you are done, click on **Mark Service Date as Reviewed**. (Enter a comment if necessary.)