

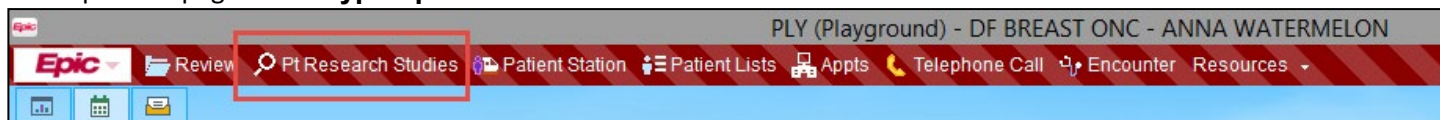
# Associating Patients to Research Studies

This tip sheet is for research study staff who are associating patients to research studies. You must associate, or enroll, a subject to a study in Epic to allow orders/encounters to be linked to the research study to ensure proper charge flow. Enrolling your patients to the study in Epic allows research orders to be placed.

**CED coordinators:** we are leveraging the research functionality to accommodate CED billing compliance. You will see screens relating to or directly referencing research studies and research scenarios. You can essentially replace anywhere you see the word “research study” with CED procedure. These set up and workflow will be identical to the current non-oncology research billing workflow.

## Find Patient in the Pt Research Studies Activity

1. Select the Partners Applications Icon on your desktop. Select ‘Epic Hyperspace’. Log in using your Partners username & password. (You must complete Research Study Team eLearning in Healthstream in order to gain access to the Epic research dashboard.)
2. The top of the page is the **Hyperspace Toolbar**. Click the Pt Research Studies button.



3. Find the patient using the minimum database set: **Name/MRN, Sex, DOB** then select Find Patient.

The screenshot shows the 'Patient Lookup' dialog box. It has three tabs: 'Select Patient', 'PHS Search', and 'Recent Patients'. The 'Select Patient' tab is active. The search criteria are as follows:

- Name/MRN: Apple Leo
- Date of Birth: [calendar icon]
- Sex: Male [2]
- Phone: [calendar icon]
- SSN: [calendar icon]
- Use sounds-like:

Buttons at the bottom include 'Find Patient', 'Clear', 'Accept', and 'Cancel'.

4. Patient select screen will open. Highlight your subject and select Accept.

The screenshot shows the search results screen. At the top, 'Search Criteria' shows 'Name/MRN: Leo, Apple' and 'Sex: Male'. Below is a table with one result:

WL	Name	Site	MRN	Sex	DOB	Street Address	SSN	PCP
17.82	APPLE, LEOPOLD		PMRN <2048853>	M	6/22/1945		xxx-xx-8515	Walt Wh

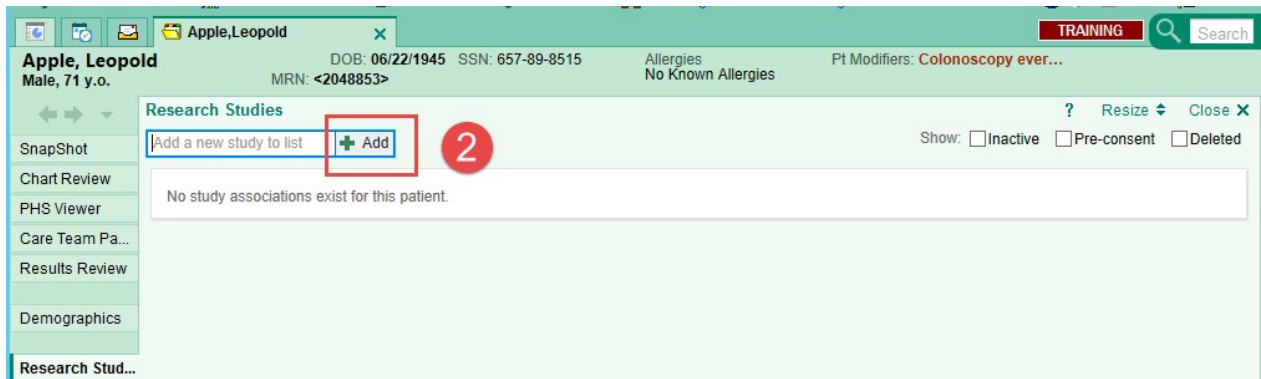
Below the table, it says 'Results loaded: 1'. A detailed view for 'Apple, Leopold - <2048853>' is shown, including:
 

- Born 6/22/1945
- 71 y o. Male
- SSN: 657-89-8515
- No access on file
- No phone numbers on file
- No e-mail address on file
- Walt Whitecoat, MD

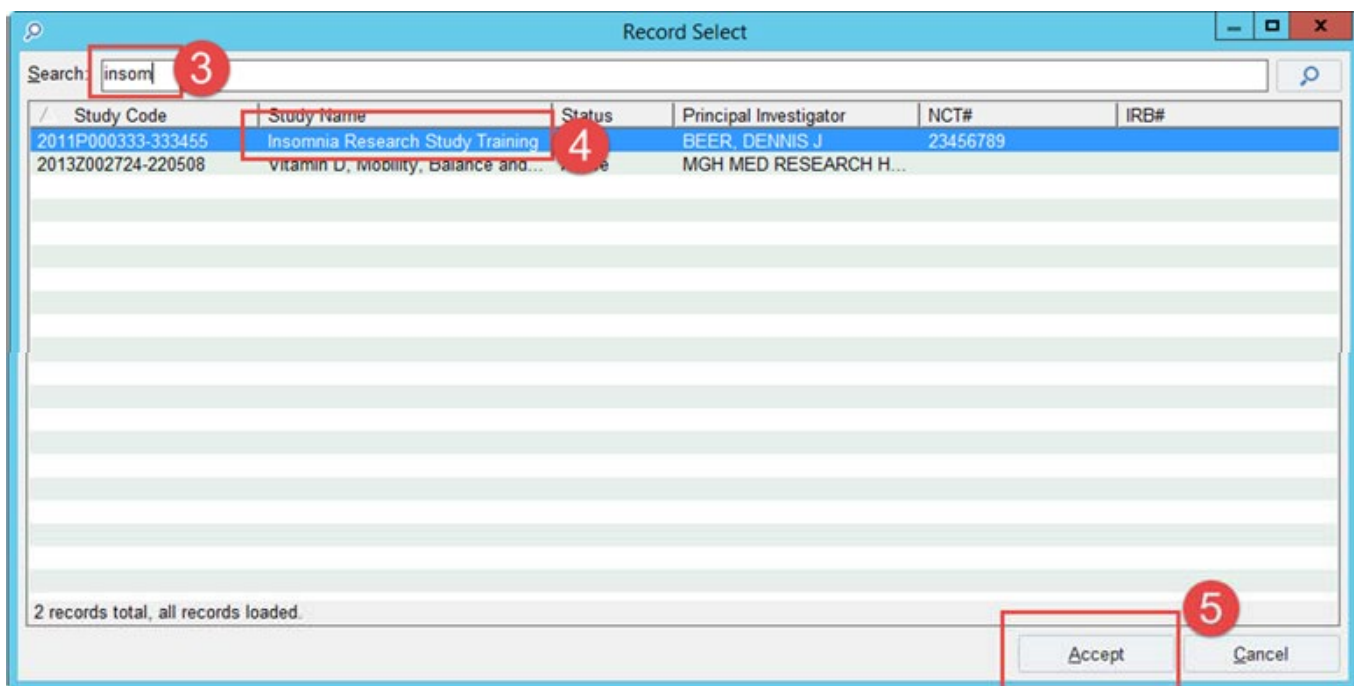
 At the bottom right, there are 'Select' and 'Go Back' buttons, with 'Select' highlighted by a red box.

## Finding the Research Study

1. You are now looking at the patient's research study activity.

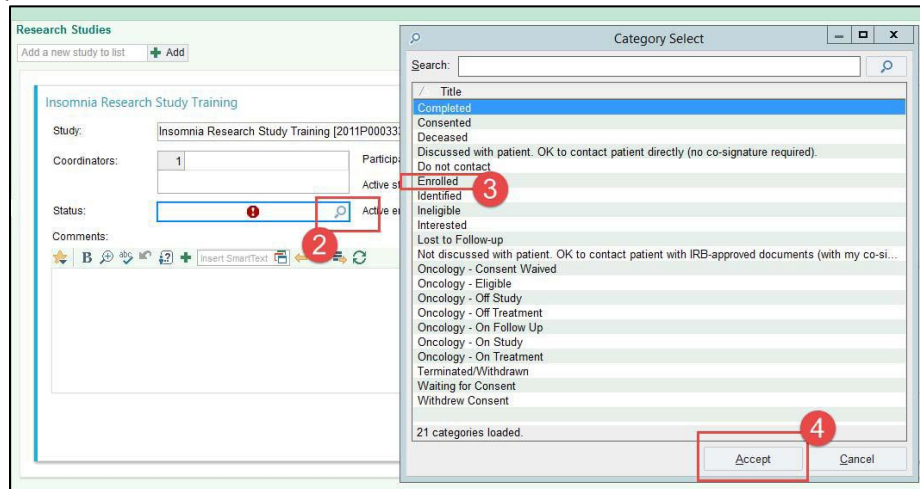


2. Click the Add button to open the search to look up the study you plan to enroll the patient.
3. Search for the study in the Record select window
4. Highlight the correct study
5. Click Accept



## Enroll the Patient

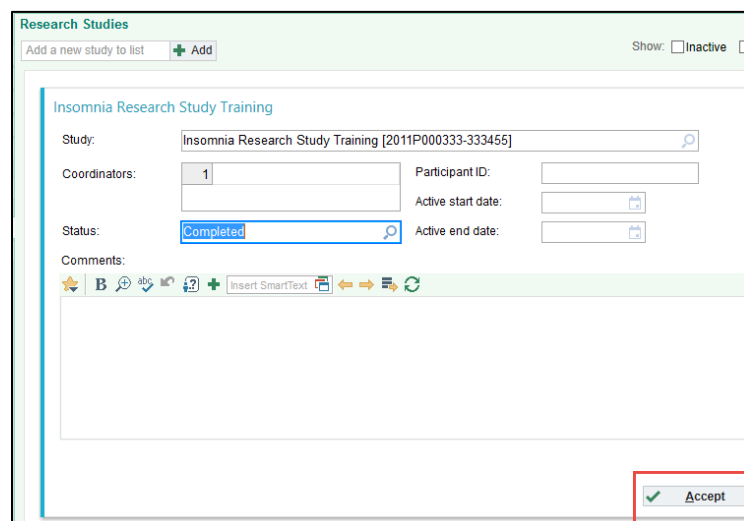
1. The Research Studies screen will open.
2. Click the selection button in the Status window
3. Select Enrolled
4. Click accept.



**NOTE:** The only Research Studies statuses assigned to subjects in Epic are “Enrolled”, “Completed”, and “Terminated/Withdrawn”. Epic is not a Clinical Trials Management System (CTMS), and other states (e.g., “Identified”, “Waiting for Consent”, “Withdrew Consent”, etc., or information about patients who decline to participate in research activities) should be maintained outside of Epic.

## Completing Enrollment

1. Once the status is set, you are back to the Research Studies screen
2. Click Accept. You have enrolled the subject into your study.



## Confirm the Patient is enrolled in the study

When the patient has been enrolled in the study a Pink flag [Research Active] will appear on the header of patient's chart.



## More Info

- The only Research Studies statuses assigned to subjects in Epic are “Enrolled”, “Completed”, and “Terminated/Withdrawn”.
- Epic is not a Clinical Trials Management System (CTMS), and other states (e.g., “Identified”, “Waiting for Consent”, “Withdrew Consent”, etc., or information about patients who decline to participate in research activities) should be maintained outside of Epic.
- Identifying a patient as ‘Enrolled’ to a study in Epic allows study-related patient care orders to be placed and associated to that study.