

Patient Timeline

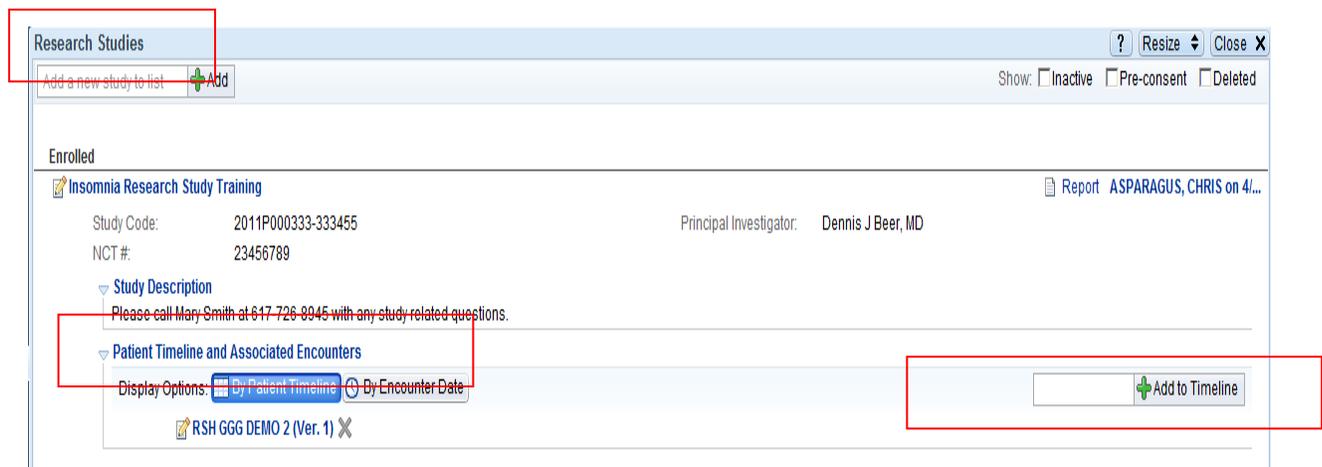
(updated 5/7/2015)

Try It Out

For any study determined to be “qualifying” under the CMS Clinical Trial Policy (meaning some or all study-related services performed during the trial may be billed to insurance per Medicare guidelines), the PCRO will create an **MCA (Medicare Coverage Analysis)**. This MCA will then be used by PCRO to create a **Billing Calendar**, which will be uploaded into Epic as the **Patient Timeline**. This Patient Timeline is an Epic tool that will help with the following:

- Setting follow-up visit study date ranges, as prescribed by the protocol, once the initial visit is scheduled.
- The routing of research-related charges to the correct buckets in the Research Billing Review report.
- After you have associated the patient to the study and set their status as ‘**Enrolled**’, the subject’s **Research Studies Activity (1)** window will open.
- Under the **Patient Timeline and Associated Encounters (2)** tab, click on the ‘**Add to Timeline**’

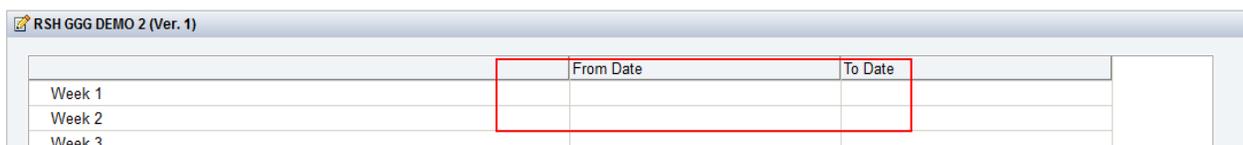
 button. (3)



The screenshot shows the 'Research Studies' window in Epic. The window title is 'Research Studies' and it has 'Add', 'Show', 'Inactive', 'Pre-consent', and 'Deleted' options. The main content area is titled 'Enrolled' and displays details for the 'Insomnia Research Study Training' study. The study code is 2011P000333-333455, NCT # is 23456789, and the Principal Investigator is Dennis J Beer, MD. The study description is 'Please call Mary Smith at 617-726-8945 with any study-related questions.' The 'Patient Timeline and Associated Encounters' section is expanded, showing 'Display Options' with 'By Patient Timeline' selected and 'By Encounter Date' unselected. The 'Add to Timeline' button is highlighted with a red box.

NOTE: If study does not have an MCA you will not have a Patient Timeline.

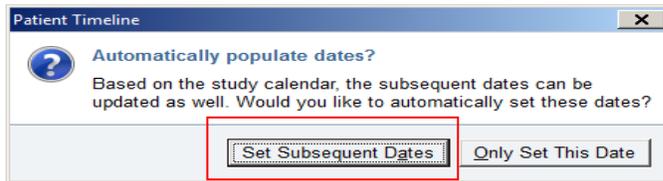
1. The timeline opens where you can view the available timeframes for appointments.
2. Enter the study start date (typically first appointment) in the first **From Date** field.



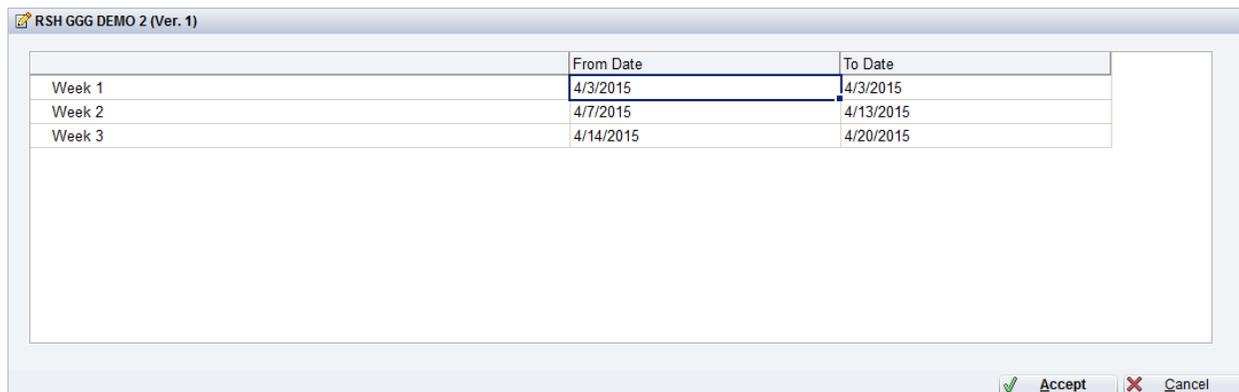
The screenshot shows the 'RSH GGG DEMO 2 (Ver. 1)' window. It displays a table with three rows labeled 'Week 1', 'Week 2', and 'Week 3'. The table has two columns: 'From Date' and 'To Date'. The 'From Date' and 'To Date' columns are highlighted with a red box.

	From Date	To Date
Week 1		
Week 2		
Week 3		

- A window will automatically open asking if you would like to **Automatically Populate Dates**. Select **Set Subsequent Dates** and the system will fill in the subsequent timeline for you.



- When the dates have been populated, click **Accept** to accept the **patient timeline**.



Take-Aways:

- After your Patient Timeline is set in Epic, a notification will pop-up if you select an encounter date that is outside the Patient Timeline date range linked to that associated research encounter.
- The notification is a check to ensure that you are associating the correct encounter.
- If you are associating the correct encounter but it falls outside of the patient timeline, you will then have the option to **repopulate subsequent dates** for your timeline based on that most recent encounter, or leave them as they are.