Creating a Record in Epic for a Clinical Research Study Requiring Medical Services at NMHC

*Feinberg School of Medicine Studies not managed by the Lurie Cancer Center*

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Team contact:

[Studytracker@northwestern.edu](mailto:Studytracker@northwestern.edu)
Requirements in eIRB+

- NMHC selected as the site of the study
- Study should have “Approved” or “External IRB” Status
Requirements in Each System

**Study Tracker**

- **Settings > Affiliations**
  - Verify that NMHC shows up under “Sites” and “Institutes”, respectively

- **Settings > Study Properties**
  - Complete required questions
  - Answer “Yes” to “Does this study use billable NMHC medical services after March 3, 2018?”

- **Settings > Epic Billing**
  - Complete required questions
  - Update the Study Team Members With Access to Epic list at the bottom of the page to reflect the users who will be need to be associated with the study in Epic

- **Budget**
  - Build a budget (not described in this document)
  - Lock the budget (only one budget can be locked per study)
Study Properties (Settings > Study Properties)

This is important information required by FSM from all studies. The following fields must be completed in order for the form to save:

• PI and Study Contact (from eIRB+)
• Chart String + SP Number
• Funding Source
  • Drop down options
• Type of Research Activities
  • Multiple choice. Additional questions if “Clinical Research”:
    • Whether an MQCT has been made and by whom. “Yes” or “No” are required to send the record to Epic. “Not done yet” will prevent sending the record to Epic.
    • NCT ID (clinicaltrials.gov registration)
• "Does this study use billable NMHC medical services after March 3, 2018?"
  • The answer needs to be “Yes” to send the study record to Epic
Epic Billing Questions

If the study will receive billable medical services after 3/3/2018, the following questions are required to provide NMHC research billing services important regulatory and administrative information

• Billing Scenario
  • Bill all to patient; bill all to study; mixed

• Case Rate
  • Whether this study has case rates and option to upload the NMHC agreement

• Study invoice contact (Name/Email/Phone)
  • The person or shared email for any billing related questions or invoices

• Study coordinator contact (Name/Email/Phone)
  • The person or shared email for any study coordination and charge review questions

The following questions on this page are the same questions from “Study Properties” and auto populated.

• Funding Source
  • Drop down options

• MQCT Determination
  • “Yes” or “No” required for the record to be pushed into Epic. “Not done yet” will prevent sending the record to Epic.

• NCT ID, required for CMS billing
  • This field will be validated against ClinicalTrials.gov
Set up Access to the Study in Epic for the Study Team

Charge Review List in Study Tracker

Identifying team members involved in the Epic research charge review is key to correctly enter/reconcile research-related encounters and the charge review in Epic. This should be kept up-to-date by study team members by:

• Removing people who should not receive research billing alerts from Epic
• Adding new people who are covering for someone on leave (for example)
• Adding new staff to the study

• IDENTIFY USERS WHO NEED TO RECEIVE EPIC TRAINING – IMPORTANT AHEAD OF PROJECT ONE LAUNCH
Control charge review access here by using the “Add” and “Remove” buttons.
Building and Locking a Budget in Study Tracker

To comply with FSM research tracking policies and NMHC research billing policies, all studies receiving NMHC Medical Service will need to have completed budgets in place and track research activities against those budgets.

Building budgets in Study Tracker is outside the scope of this document; however, having a locked budget in place is a necessary requirement for Study Tracker to create a study record in Epic.

PLEASE CONTACT THE STUDY TRACKER TEAM IF YOU THINK YOU WILL BE UNABLE TO BUILD AND LOCK A BUDGET AHEAD OF PROJECT ONE GO-LIVE.
Building and Locking a Budget in Study Tracker

Click on the Budget tab and select the budget against which you want to track the participants (you may create more than one budget for testing purposes).

Lock that budget and you will be done.

You will see “Track” instead of “Lock” once the budget the locked.

Track participant against the locked budget at enrollment.

Tracking participant against a budget is demonstrated in the P1 Research Training.