Research Workflow in Epic & Study Tracker
Participant Tracking for Medical Services at NMHC

Study Tracker Team
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**Requirements in Study Tracker**

**Settings > Affiliations**
- Verify that NMHC shows up under “Sites”

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

**Settings > Epic Billing**
- Complete “Contacts” information by recording Study Coordinator and Study Invoice contact and answer all questions under “Financial Information”
- Update the “Study Team Members With Access to Epic” list at the bottom of the page to reflect the users who will need to be associated with the study in Epic

**Budget**
- Build a budget (not described in this document)
- Lock the budget

**Epic Syncing**
- Confirm the study has synced with Epic by locating the timestamp under the Compliance tab
Locked Budgets

You are only able to perform Charge Review against a budget that was created and locked.

- Budgets can be found under the “$ Budget” tab in Study Tracker
- A locked budget is indicated by the symbol of a lock next to the budget name
- A locked budget will also enable the “Track” button option.

Participant Requirements

Participants must meet all the following requirements in Study Tracker so that Charge Review can be performed:

- Validated MRN recorded
- Budget Arm assigned
- Active Activity recorded

Once these items are recorded as a consented participant, the participant record will sync to Epic. Details on whether or not a participant is synced to Epic can be found in their profile.

Subject Epic sync status: Successfully synced on Feb 22, 2018 at 6:48 AM
1.) Participant Tracking

You may locate the scheduled visit to track for the participant by entering the schedule one of two ways:

a.) **Overall View:** Identify the appropriate Budget Arm that the participant was assigned to after clicking on the Track option from the $Budget tab. The list of assigned subjects will display along with the associated budget schedule.

b.) **Subject View:** Upon opening the Subject’s profile and clicking on the Budget tracking tab the participant’s schedule will display.

All of the scheduled services will display upon selecting the visit that is to be tracked.
2.) Participant Tracking

Once the services for a scheduled visit you can do the following:

- Acknowledge all scheduled services for the visit took place by confirming the date associated with the service and clicking “Save.”
- Identify scheduled services that were not completed by clicking the “Not Done” box next to the service.
- Change the date of service in which the service was performed. Remember that the date of service is critical for budget reconciliation.
- Change the Research service to Standard of Care if applicable.
- You can also modify the quantity, cost breakdown or add notes to a service for OOR review.
Epic Requirements to complete Participant Tracking

Ensure the subject encounter/visit is linked to the study in Epic for every research visit. Once a subject is recorded in Study Tracker and you confirm that the subject has synced to Epic (see “Epic Syncing” section of this document on Page 2), you will be able to link the subject encounter/visit to the study. This encounter/visit link in Epic provides the necessary confirmation for cross-referencing medical services performed to the existing budget in Study Tracker. To link a subject in Epic follow these steps:

Visit the “My Research Linked Appts” section of your Epic dashboard and click on the “No Value” link to identify which encounters/scheduled appointments may need linking to a research study.

An empty “Linked Study Code” and “Linked Study Name” indicates that the appointment is not linked to a research study.

Once the pop up appears you will be able to link the visit to the study by clicking the study number and “Accept.”