

INTRODUCTION


When placing research study-related orders in Epic, it is critical that you associate any orders related to research to the correct study. Orders being associated to a research study can be individually selected to ensure only the research-related orders are associated. This process allows flexibility when not all of the orders in the visit are study related and assists with the review process completed by office of Clinical Research Billing Compliance (CRBC) to ensure participants are not accidentally billed for charges that should be paid by the study.

ORDERS IN EPIC

Epic allows the user to link encounters and orders to the research study, document research visits and keep track of upcoming participant's appointments. Note that **encounter and order linking is mandatory**.

Keeping participants' enrollments updated within the Clinical Trials Management System (CTMS) (CRMS or OnCore) is the process that notifies Epic that the patient is a research participant and creates the Research indicator seen on the header of Epic's story board. To be able to link orders to a research study, the patient must first be in an active enrollment status for that study within the CTMS.

Research Participant

- The participant should be entered into the CTMS prior to placing research orders or scheduling research encounters whenever possible, but must be entered into the CTMS prior to the close of their initial research encounter in Epic.
- Once a patient is correctly associated with the research study in the CTMS, an order for that patient can be linked to the study in Epic.
- You will see this icon in Epic when the linking was done correctly: 

>Important - Orders must be associated to a research study before they are signed. Once the Sign button is clicked, it is not possible to associate the order to a study. It is a good habit to review the order for the flask icon which indicates it has been linked to a study before clicking Sign.

LAB ORDERS BEFORE A SCHEDULED APPOINTMENT

Research-related labs are often placed in advance of the patient's visit by using an Orders Only Encounter, however the order may also be placed directly on the Appointment or Office Visit encounter as well.

Research Coordinators have the ability to create Orders Only encounters and to place orders, they do not have the access to release orders, to print labels or collect specimens. Once the patient has been checked in, a user with a clinical role will release the order, print the label, and collect any specimen.

>Important – There is no way to enter a future lab order in Epic in a way that will “appear” in the system later. Therefore, you take the risk of the research labs being drawn outside of the tolerance window if you enter the order too far in advance. If this happens, your study will be responsible for paying for those labs.

>Important – If orders have been placed for a participant who is no longer on a study, or if a candidate has chosen not to consent to the study, the outstanding study orders must be cancelled/deleted by a clinician. Research Coordinators do not have the access to alter orders that have been signed. Labs drawn based on the orders for participants that did not consent will be billed to the study.

RESEARCH BILLING

- It is important to note that research discounts are automatically applied in the Epic system. Research Study Teams should refer to the Epic Enterprise Charge Viewer to find the research pricing for “orderables” that are specific to their study. Negotiating

special rates with service centers like Pathology does not change Epic's research billing functionality and is not recommended. There is no way to guarantee that research rates other than what is listed in Epic will be what is charged to a study team on their monthly billing statement.

- It is essential to understand that labs drawn in error – ordered in advance and outside of the tolerance window; or ordered for a candidate and not cancelled – will be billed to the study.

WHAT CAN YOU DO?

- Make sure that you entered the participant in the CTMS before the encounter is closed or the orders are placed in Epic and do not take them “off study” on the same date that services were provided.
- Make sure that you link lab orders to the study; this is the only way to assure that CRBC will review the charges and avoid billing mistakes.
- Cancel orders for candidates that ended not consenting to the study. Orders for participants that are off-study should be canceled by a study team clinician.

The most current Epic Tips & Tricks are available in your Epic Research Dashboard or by searching in the [Epic Training Portal](#)

Important clinical research billing information and helpful contacts are available at this web link: [JHM Research Revenue Cycle Website](#)

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