EMR Research Functionality Demo and Best Practices

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Class Objectives

• Learn how to use the Epic Electronic Medical Record research functionality
  • Setting up a Study
    • First things first – entry into Bridge
    • Set up study info
    • Add users (study coordinators, PI, etc)
    • Billing set-up
  • Adding a Patient to a Research Study
    • Study start date and subject status
    • Short study description with contact info
  • Associating an Encounter to a Research Study
    • How to associate and encounter before and after subject comes to their study visit
• Best Practices
  • Tools to help you stay organized
  • What I’ve learned so far
Helpful Tools
(SOP #13 and Quick Start Guide)

• SOP #13
  • Provides guidance to research personnel on the process of creating and managing research studies in EMR/Epic
  • List of helpful SOPs can be found here, including SOP #13: http://intranet.ucdmc.ucdavis.edu/ctsc/area/clinicaltrials/sops/index.shtml

• Quick Start Guide
  • Tailored to the clinical research coordinator’s duties
  • Can be found here: http://intranet.ucdmc.ucdavis.edu/emr/projects/P_New_Dest/Research.shtml
Setting Up a Study

- Go to your Research Home Dashboard and click on “Research Study Maintenance”
Setting Up a Study

- Enter the name of your study
Setting Up a Study
Setting Up a Study

General study information is shown here:
Setting Up a Study

- Review the information – PI, coordinators, other personnel
- You can add or delete names as needed
- The information added here is at the “study level”
Setting Up a Study

• Create Records Necessary for Billing
  • Creates a dummy patient record and temporary billing account number
  • Initiates tracking of charges and the billing process
  • Reports show the association of the billing account number with the IRB#
Associating a Patient to a Research Study

- There are 2 ways to do this:
  - Research Home Dashboard
  - Epic button on top left
  - Research Home Dashboard
Associating a Patient (cont.)

- Epic button on top left
Associating a Patient (cont.)

- Enter your patient’s name or MRN here:
Associating a Patient (cont.)

- Any studies the subject is currently participating in will be listed (blank if no studies)
Associating a Patient (cont.)

• The information you add here will be on the “patient level”
• Add the coordinator/s (only those who are added on the “study level” will be available to be added)
• Enter any information applicable to patient
• Under “Enrollment Comments”, add PI and coordinator names, contact info, and important info about the study
Questions so far?
Associating an Encounter to a Research Study

- Can be found on the Research Home Dashboard
Associating an Encounter (cont.)

• Enter your subject’s name/MRN
Associating an Encounter (cont.)

- After you enter your patient, a list of their encounters will be displayed.
- Choose the encounter that needs to be associated to the study.
Associating an Encounter (cont.)

- Once an encounter is chosen, you will click on the “Research: Active” link on the top screen.
Associating an Encounter (cont.)

- Click on “Link to Encounter” button
Associating an Encounter (cont.)

- Go to “Chart Review” to confirm the presence of a beaker which indicates that the encounter is associated to a study.
Associating an Order to a Research Study

- Open the research encounter and add the orders under “Order Entry”
- Enter the diagnosis/diagnoses as appropriate
- Because the encounter is research-related, enter Z00.6 (what used to be V70.7)
Associating an Order to a Research Study

- Standard practice requires an association of the encounter/order to a diagnosis (or diagnoses)

When you are ready to associate, click the button and this window will appear. Associate the appropriate diagnoses to the orders and click “Accept”
Associating an Order (cont.)

• Now you’ll see that the order has these 2 circles linked to show that they’ve been associated to the diagnoses you chose

• Next, the orders need to be associated to the research study
• This needs to be done for ALL orders associated to the research study so that personnel (e.g., coders) are aware that these orders are research-related and are routed to the appropriate account (insurance vs. study)
• So how do we do this?
Associating an Order (cont.)

- First and foremost, ensure that your window is maximized to show “Research Association” on top right.
Associating an Order (cont.)

• Place a check mark on the boxes that are related to the study

• Click “Accept”
• Now you’ll see that there is a beaker next to the linked circles that shows that the orders have been linked to the research study
Associating an Order (cont.)

- Depending on how your department is set up, you can either sign orders or you can pend the orders for a nurse, physician, etc. to sign.
Research Billing Review

• Gives coordinators an opportunity to review charges for accuracy
• Need to ensure that procedures are billed correctly (patient/insurance vs. study)
• Also ensure that procedures are marked as either study-related or non-study-related
• Can run the report through the Research Home Dashboard
• IMPORTANT: Once a patient is associated to a study, all charges for all visits (even those not related to the study) will have to be reviewed and approved by the coordinator/designee
Research Billing Review (cont.)

• To run the report:
Research Billing Review (cont.)

- The results will show all patients who are in studies for which you are a coordinator (as assigned at the patient level, when you associated a patient to a research study)
Research Billing Review (cont.)

1) If a charge needs to be corrected, place a checkmark to the left of the applicable charge

2) Click “Research Correction”
Research Billing Review (cont.)

• Select either “Research-related” or “Not research-related”
• If “Research-related”,
• Enter the study name in the Study field
• For the “Bill to” section, select either “Patient/Insurance” or “Study”
Research Billing Review (cont.)

- Click “Refresh” to review the changes
- Click “Mark Account as Reviewed” or “Mark Service Date as Reviewed”
Research Billing Review (cont.)

- If you don’t have a Research Dashboard, use the Epic button
Research Billing Report (cont.)

- Click on the “Library” tab
Research Billing Review (cont.)

- In the “Search” box, enter “CRC”
Research Billing Review (cont.)

- There will be 2 reports:
  - 1) Patients Needing Billing Review for CRCs (Patient Level)
  - 2) Patients Needing Billing Review for Non-CRCs (Study Level)
Best Practices

- Set studies up on the Bridge before you can start anything on EMR
- Always set the study up in EMR and include key personnel (PI, coordinator, designated billing review person if not coordinator)
- Always associate subjects to research studies, even when they are still in the screening process
- Review charges regularly, otherwise, the charges are not billed (either to the study or insurance)
- Try to run both CRC and Non-CRC reports to make sure all charges are reviewed and approved
- If you are unsure, refer to the Quick Start Guide or call someone who can walk you through it
What I’ve Learned So Far...

• It looks complicated, but it’s not too bad
• It’s still a work in progress
• Always ask if you have questions – everyone is really helpful

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Thank You!