Patient Encounter Linking to the Study

Audience: Research Coordinators

Summary: Marking the encounters as having research content is important for billing and regulatory requirements. Patient enrollment in Epic is a prerequisite to mark Research Encounters. Encounter linking ensures study charges are grouped as research charges, increases the care team’s visibility on patient’s involvement in Research, and helps medical records during the release of patient information.

Patient Encounter Linking Steps

1. Open the Research Coordinator Dashboard. Note the section "My Study Patient Appointments."
2. Note the Patient name, Date, Dept, and the provider for the appointment

3. Click Open the name of the patient to link the appt to the study.
   A. The appt details are opened.
      1. Select the right appt to link to the study.
      2. Choose the "Link to Research Study" option from the toolbar.
      3. "Link the encounter." to the appropriate study

4. Linked appts are grouped under the study name as in the first screenshot.