

Epic Research – Clinical Research Billing

Encounter Linking

LINK IT or SINK IT

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For Internal Use Only

Contents

- 1 Background / Usage for LINK It or SINK It..... 3
- 2. Create a Short Cut to My Dashboard..... 4
- 3. Locate your Patient..... 8
 - 3.1 Ensure All Patients are Loaded for Viewing and Linking 9
 - 3.2 Google-like Search..... 10
- 4. Understanding the Researchers/Coordinators Dashboard 15
- 5. Supporting Custom Report and Other Links..... 16
- 6. Linking a Scheduled Future Appointment to a Study by Registrations personnel **Error!**
Bookmark not defined.
 - 6.1 Navigate to Epic→Scheduling→Appts menu **Error! Bookmark not defined.**
 - 6.2 On the Appointment Desk **Error! Bookmark not defined.**

Amendment History

Ver	Date	Requestor	Description of amendment	Released by
1.0	02/01/2017	Noel Pollante	<i>Initial Release</i>	Noel Pollante
1.1	08/28/2017	Noel Pollante	<i>Updated Encounter Linking Details</i>	Noel Pollante/Marie Jackson

1 Background / Usage for LINK It or SINK It

Associating clinical encounters related to a Research Study are very important to proper billing. All Research related charges should go through a two-pass review process, which starts with the Research Coordinator (RC), and finishes with the Clinical Research Billing (CRB) Department within Revenue Cycle.

To stop charges from going straight to the patient or their insurance, the Encounter needs to be flagged as being related to Research. To do this, the Encounter must be linked to the Research Study. It is best to do the Encounter Linking prior to the research visit occurring.

This user guide will demonstrate the following:

- How to set up the *My Dashboard* quick button
- How to link encounters **prior** to the visit for both outpatient and inpatient visits

There will be times when an Encounter does not get linked to a Research study prior to the encounter being closed. When this happens, it will be the Research Coordinator's responsibility to retrospectively link the encounter. We created a Post Encounter Oops Bucket for after visit linking. Once the encounter is linked from the Oops Bucket, the charges for that encounter will route back to the CRB team for charge review.

If the encounter is not linked to the study, the charges will go straight to the patient or their insurance for payment. This could result in billing errors.

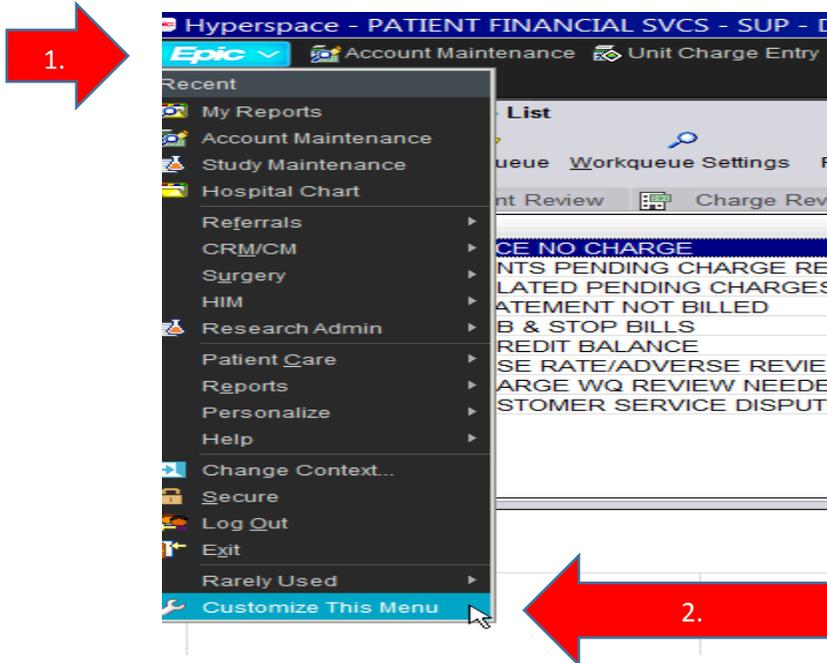
Additional resources in this user guide are the following:

- How to link encounter **after** the research visit occurred for both outpatient and inpatient visits
- How to create a quick access **custom report** for your research studies

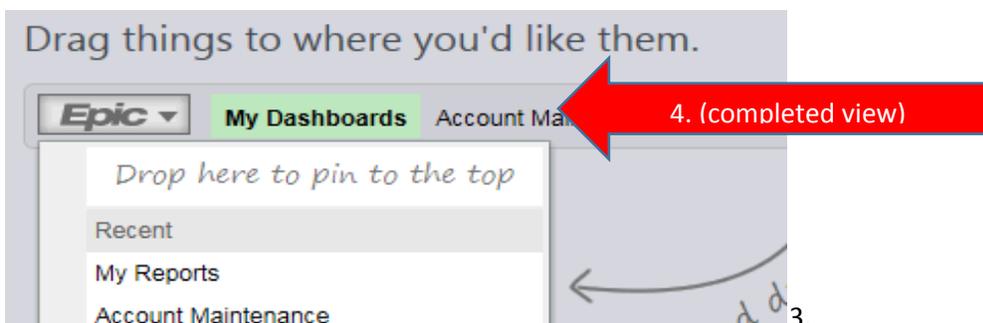
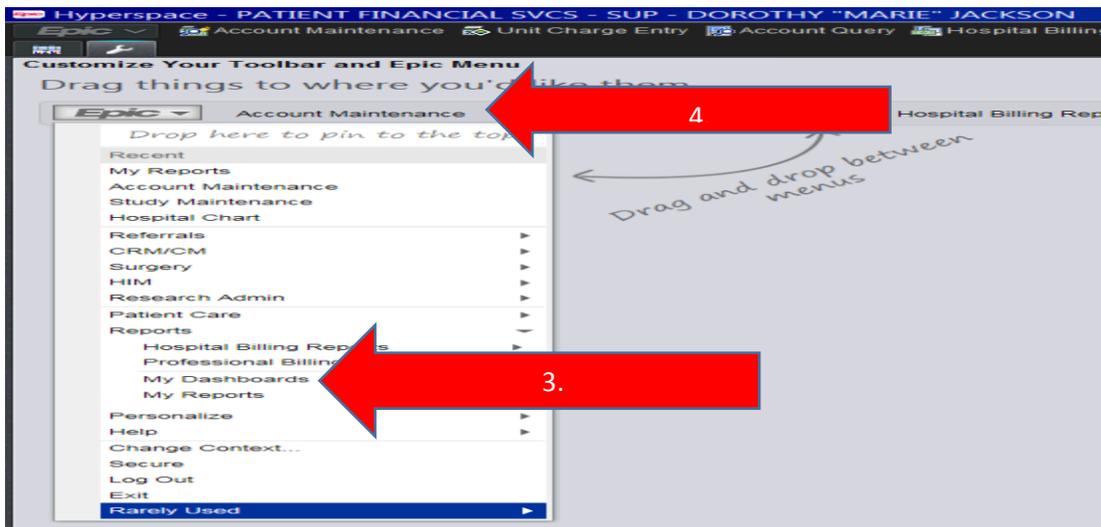
Emergency visits and adverse events can be linked provided the research team learns about the visit within 7 days after the encounter closes.

2. Create a Short Cut to My Dashboard

Once you set up the My Dashboard button, when you open Epic, it will always appear in your task bar.



1. Click on "Epic" button
2. Click on "Customize this Menu"
3. Find "My Dashboard" button
4. Drag "My Dashboard" button beside the main Epic button WITHIN the gray screen
5. Click "Accept" at the bottom of screen



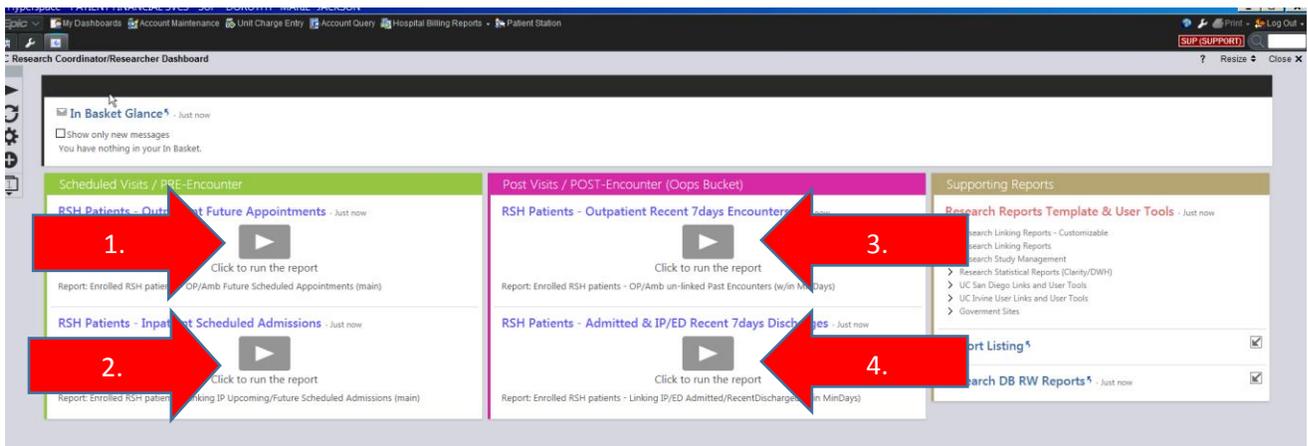
1. Once you set up the quick button for My Dashboards, double click to open
2. Then click UC Research Coordinator/Research Dashboard

The screenshot shows a web application interface with a table titled "vital Billing Workqueue List" and a "Dashboard Launcher" dialog box. A red arrow labeled "1." points to the "My Dashboards" button in the top navigation bar. Another red arrow labeled "2." points to the "UC Research Coordinator/Researcher Dashboard" option in the "Dashboard Launcher" dialog.

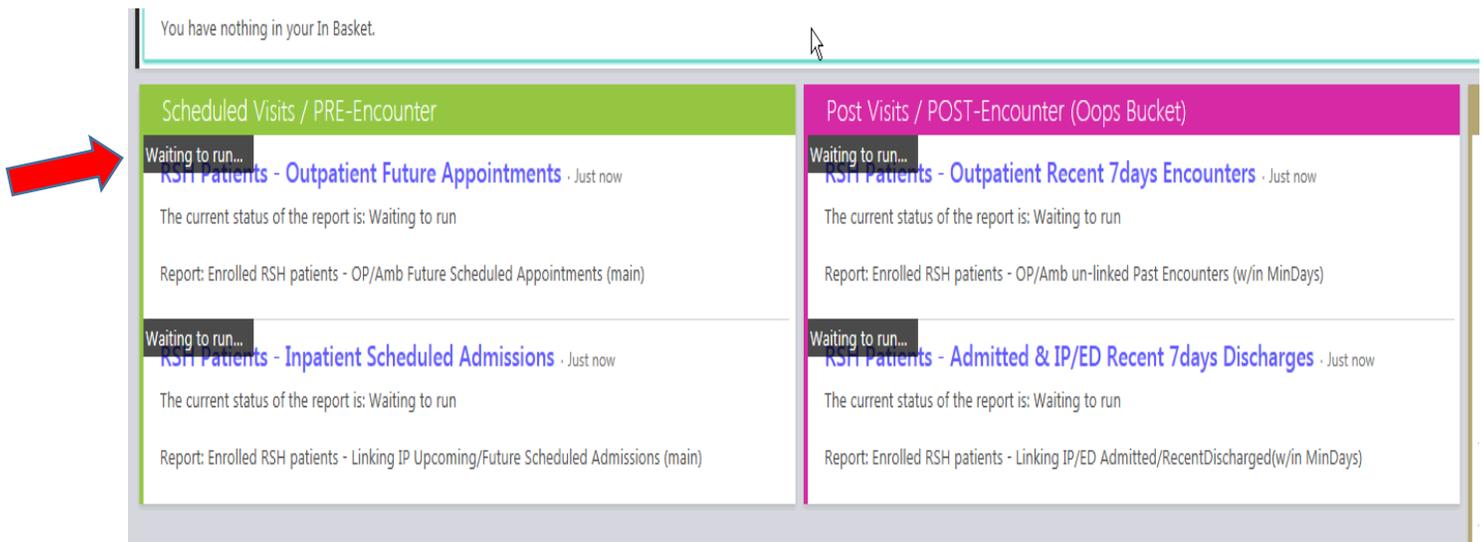
Name	Service Area	Act...	Active Cnt	Tick Cnt	Total Cnt	Last Accessed By	On	Primary User	Superv
5 HB CREDIT BALANCE NO CHARGE	10 - UC SA	YES	272	78	350	SUAL-AHL, SUSAN ...	07/19/2017	ABM1-MEAH-BLAIR...	SUAL-
HB VELOS ACCOUNTS PENDING CHARGE RE...	10 - UC SA	NO							MJQ-
7 HB RESEARCH RELATED PENDING CHARGES...	10 - UC SA	NO							MJQ-
5 HB RESEARCH STATEMENT NOT BILLED	10 - UC SA	NO							MJQ-
5 HB RESEA									MJQ-
3 HB CORPO									MJQ-
2 HB RESEA									MJQ-
HB RESEARCH OF PFS W/ REVIEW NEEDED...	10 - UC SA	NO							MJQ-
28 HB RESEARCH CUSTOMER SERVICE DISPUTE	10 - UC SA	YES							MJQ-

The Linking Dashboard will open. Click the 4 arrows to populate the report.

Note: this report is snapshot in time. This report can be refreshed every 30 minutes for updates to appear from the scheduling department.



The report will take a few minutes to find patients associated with research.



1. The green area is for future visits. It is best to link **prior** to the visit.
2. The pink area is for linking visits **after** the visit occurred. You have 7 days to link after the visit has been completed.

Scheduled Visits / PRE-Encounter

RSH Patients - Outpatient Future Appointments - Just now
Report completed: Fri 8/25 10:55 AM

Service Area	Total Appointments	Linked Appointments
UCSD HEALTH SYSTEM SERVICE AREA	3,295	1
08/25/2017	158	0
08/26/2017	25	0
08/27/2017	10	0
08/28/2017	215	0
08/29/2017	170	0
08/30/2017	214	1
08/31/2017	144	0
09/01/2017	123	0

RSH Patients - Inpatient Scheduled Admissions - Just now
Report completed: Fri 8/25 10:54 AM

Service Area	Total Expected Admissions	Linked Exp Admit
UCSD HEALTH SYSTEM SERVICE AREA	189	0
08/25/2017	16	0
08/26/2017	1	0
08/28/2017	15	0
08/29/2017	9	0
08/30/2017	15	0
08/31/2017	10	0
09/01/2017	9	0
09/05/2017	9	0

Post Visits / POST-Encounter (Oops Bucket)

RSH Patients - Outpatient Recent 7days Encounters - Just now
Report completed: Fri 8/25 10:56 AM

Service Area	Total Encounters	Current Hour Linked Encounters
UCSD HEALTH SYSTEM SERVICE AREA	2,353	0
08/19/2017	47	0
08/20/2017	39	0
08/21/2017	440	0
08/22/2017	502	0
08/23/2017	498	0
08/24/2017	485	0
08/25/2017	342	0
Total count	2,353	0

RSH Patients - Admitted & IP/ED Recent 7days Discharges - Just now
Report completed: Fri 8/25 10:56 AM

Service Area	IP/ER Status	Linked IP/ED/HoV
UCSD HEALTH SYSTEM SERVICE AREA	121	0
Admission	28	0
[No Value]	28	0
Discharged	93	0
08/19/2017	10	0
08/20/2017	8	0
08/21/2017	20	0
08/22/2017	17	0
08/23/2017	21	0
08/24/2017	13	0

3. Locate your Patient

To find a research patient you wish to link:

1. If the visit is **outpatient**, click **“UCSD Health System Service Area”** for a listing of all outpatient visits scheduled in the future.
2. If you know the particular date the patient is scheduled, you can simply click that date.
3. If the clinical visit is **inpatient**, click under the inpatient area **“UCSD Health System Service Area”** for a listing of all inpatient visits scheduled in the future.
4. If you know the particular date the patient is scheduled, you can simply click that date.

Scheduled Visits / PRE-Encounter

RSH Patients - Outpatient Future Appointments - 1m ago
Report completed: Fri 8/25 10:55 AM

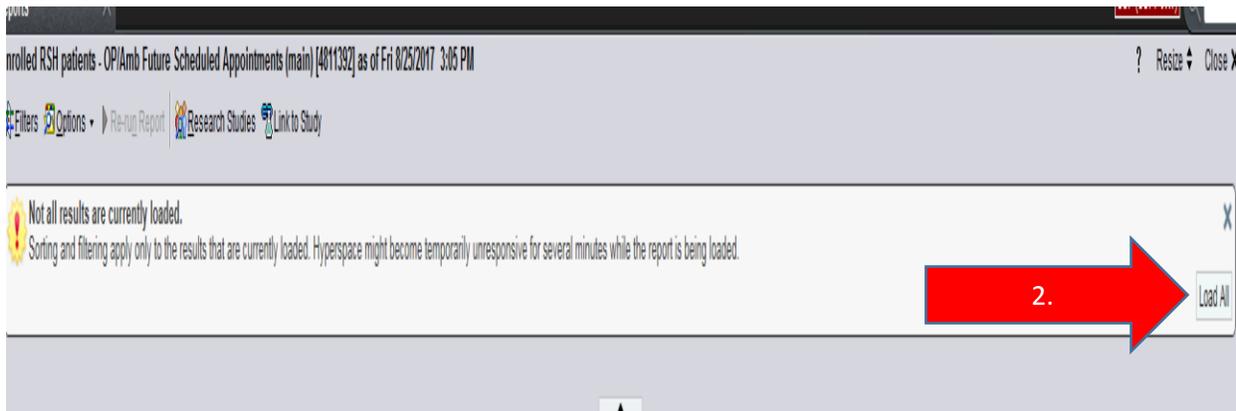
Service Area	Total Appointments	Linked Appointments
UCSD HEALTH SYSTEM SERVICE AREA		
08/25/2017	158	0
08/26/2017	25	0
08/27/2017	10	0
08/28/2017	215	0
08/29/2017	170	0
08/30/2017	214	1
08/31/2017	144	0
09/01/2017	123	0

RSH Patients - Inpatient Scheduled Admissions - 2m ago
Report completed: Fri 8/25 10:54 AM

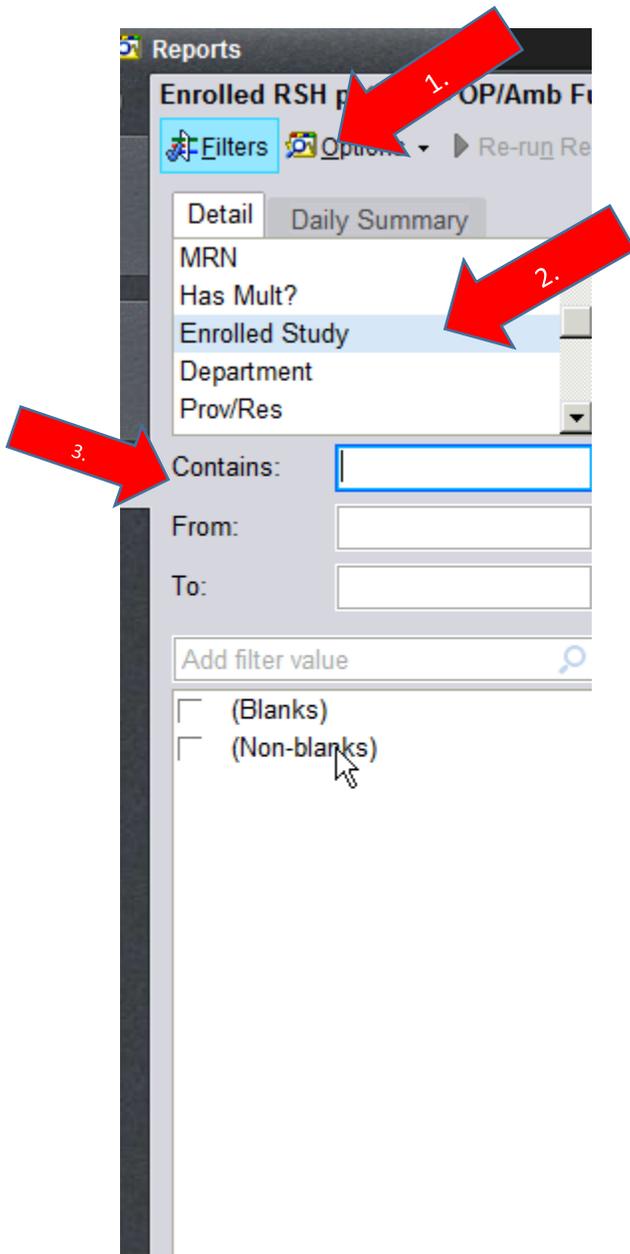
Service Area	Total Expected	Linked Exp
UCSD HEALTH SYSTEM SERVICE AREA		
08/25/2017	16	0
08/26/2017	1	0
08/28/2017	15	0
08/29/2017	9	0
08/30/2017	15	0
08/31/2017	10	0
09/01/2017	9	0
09/05/2017	9	0

3.1 Ensure All Patients are Loaded for Viewing and Linking

1. If you see the message **“Not all results are currently loaded”**
2. Before proceeding, Click **“Load all”**



3.2 Google-like Search



You can search using different criteria. One way is to search by IRB number.

1. Click on **“Filters”**
2. Scroll thru the detail list to find **“Enrolled Study”**
3. Enter IRB # in **“Contains”** field
4. Click **“Apply”** at the bottom of the screen

This search will find all patients scheduled for a future visit that are currently enrolled on that study.

Wait for several minutes for report to run... then this screen will pop-up. You can “LINK” future appointments as follows:

1. Find the patient you want to link
2. Then double-click on the patient’s name
3. Another way is to select the button “Link to Study” from the toolbar
4. The “Link to Study” screen will appear
 - i. Note: if a patient is on multiple studies, all studies associated with that patient will appear
5. Click the appropriate box located in front of the study number and title to link that visit to the correct IRB
6. Click “Accept”
7. If you link a patient incorrectly, you can unlink from this screen as well by unclicking the box

Enrolled RSH patients - OPI/Amb Future Scheduled Appointments [4156542] as of Mon 2/13/2017 9:08 AM

Patient	ISIRI Linker	Date	Enrolled?	Appt Time	CSN	MRN	Has Mult?	Department	Prov/Res	Appt Status	Made Date	Entry Person	Type	Linked Study	Linked Study Name
Cadence, Salena		01/31/2017		2:15 PM	33000007012	80000482	No	HCH MRI	HC MRI	Comp	1/31/17	CLAYTON, SALENA M [SMCG]	MRI ABDOMEN W/O CONTRAST		
Cadence, Salena		01/31/2017		1:25 AM	33000006053	80000482	No	HCH DIALYSIS LAB	DIALYSIS REG ROOM	No Show	1/19/17	CLAYTON, SALENA M [SMCG]	DIALYSIS REGISTRATION		
Cadence, Salena		01/25/2017		1:35 AM	33000006079	80000482	No	HCH DIALYSIS LAB	DIALYSIS REG ROOM	No Show	1/19/17	CLAYTON, SALENA M [SMCG]	DIALYSIS REGISTRATION	080625	(PICAL) EPIDEMIOLOGY OF DIABE
Cadence, Salena		01/25/2017											NEW HEP		
Cadence, Salena		01/24/2017											DIAGNOSTIC MAMMOGRAM BILATERAL	080625	(PICAL) EPIDEMIOLOGY OF DIABE
Cadence, Salena		01/20/2017											DIALYSIS REGISTRATION	080625	(PICAL) EPIDEMIOLOGY OF DIABE
Cadence, Salena		01/20/2017											REGISTRATION		
Test, Andrew		01/13/2017											DIALYSIS REGISTRATION		
Test, Jamie		02/09/2017											OT EVAL	101689	PRO00019865 (702), PROSPECTIV
Test, Jamie		02/08/2017											OFFICE VISIT		
Test, Jamie		01/31/2017											RETURN FAMILY PATIENT		
Test, Jamie		01/25/2017											URGENT CARE WALK-IN	100995...	MCH-02-001: A PHASE II DOUBLE-BL
Test, Jamie		01/19/2017											RETURN SURG VASCULAR	100995	MCH-02-001: A PHASE II DOUBLE-BL
Test, Jamie		01/14/2017											HOLTER MONITOR REMOVAL		
Test, Jamie		01/13/2017		9:30 AM	33000005855	80000185	Yes	SCV CV IMAGING	SCV CV TECH ROOM	Comp	1/13/17	BRIGGS, CRYSTAL LEIGH [CUB]	HOLTER MONITOR HOOK-UP		
Test, Jamie		01/13/2017		11:00 AM	33000005847	80000185	Yes	SCV CARDIOLOGY	FELD, GREGORY KENT	Comp	1/13/17	BRIGGS, CRYSTAL LEIGH [CUB]	CARDIO RETURN		
Test, Jamie		01/12/2017		8:40 AM	33000005530	80000185	Yes	VU URGENT CARE	VU URGENT CARE	No Show	1/11/17	REBELLO, LAURIE A [LAR2]	URGENT CARE WALK-IN		

Link to Study dialog box content:

Linked	Study Code	Study	Status
<input type="checkbox"/>	080625	(PICAL) EPIDEMIOLOGY OF DIABETES INTERVENTIONS AND COMPLICA...	Active/On Treatment

Informational Only

1. To verify the patient is linked to the study, the **blue research beaker** will appear.  [Link to Study](#)
2. The **red beaker** means the patient is or has been on a research study.

In order to keep your linking list to a minimum, it is important to maintain the current study status in Velos.

Enrolled RSH patients - Future Scheduled Appointments [4156462] as of Sun 2/12/2017 9:39 PM

Filters Options Expand Research Studies Link to Study

Patient	SHLink	Date	Enrolled?	Appt Time	CSN	MRN	Has Mult?	Department	Prov/Res	Appt Status	Made Date
Cadence, Salena		01/31/2017		2:15 PM	33000007012	80000482	No	HCH MRI	HC MRI	Comp	1/31/17
Cadence, Salena		01/31/2017		1:25 AM	33000006053	80000482	No	HCH DIALYSIS LAB	DIALYSIS REG ROOM	No Show	1/19/17
Cadence, Salena		01/25/2017		1:35 AM	33000006079	80000482	No	HCH DIALYSIS LAB	DIALYSIS REG ROOM	No Show	1/19/17
Cadence, Salena		01/25/2017		2:00 PM	33000005961	80000482	No	PMC ABD TXP & HEP	KUJO, ALEXANDER	No Show	1/18/17
Cadence, Salena		01/24/2017		5:20 PM	33000006229	80000482	No	MUC MAMMOGRAPHY	CC DIGITAL MAMMO 1	No Show	1/24/17
Cadence, Salena		01/20/2017		1:05 AM	33000006052	80000482	No	HCH DIALYSIS LAB	DIALYSIS REG ROOM	No Show	1/19/17
Cadence, Salena		01/20/2017		12:45 AM	33000006046	80000482	No	HCH DIALYSIS LAB	DIALYSIS REG ROOM	No Show	1/19/17
Test, Andrew		01/13/2017		8:45 AM	33000005398	80000139	No	HCH PHYSICAL THERAPY	DANIELS, LINDA A.	No Show	1/9/17
Test, Jamie		02/08/2017		1:00 PM	33000010036	80000185	Yes	LWC FAMILY MEDICINE	INPATIENT-AMB, RESIDENT (UCSD)	Comp	2/8/17
Test, Jamie		01/31/2017		9:20 AM	33000006960	80000185	Yes	LWC FAMILY MEDICINE	WU, JENNIFER JU-CHIA	No Show	1/31/17
Test, Jamie		01/25/2017		3:20 PM	33000006523	80000185	Yes	VLJ URGENT CARE	VLJ URGENT CARE PHYSICIAN	Comp	1/25/17
Test, Jamie		01/19/2017		8:00 AM	33000005976	80000185	Yes	MOS SURG VASCULAR	BANDYK, DENNIS FRANCIS	Comp	1/18/17
Test, Jamie		01/14/2017		9:30 AM	33000005856	80000185	Yes	SCV CV IMAGING	SCV CV TECH ROOM	No Show	1/13/17
Test, Jamie		01/13/2017		9:30 AM	33000005855	80000185	Yes	SCV CV IMAGING	SCV CV TECH ROOM	Comp	1/13/17
Test, Jamie		01/13/2017		11:00 AM	33000005847	80000185	Yes	SCV CARDIOLOGY	FELD, GREGORY KENT	Comp	1/13/17
Test, Jamie		01/11/2017		8:40 AM	33000005530	80000185	Yes	VLJ URGENT CARE	VLJ URGENT CARE PHYSICIAN	No Show	1/11/17
Test, Jamie		01/11/2017		10:00 AM	33000005506	80000185	Var	UIC ALLERGY	TEMPLETON, TEBI	Comp	1/11/17

19 of 19 results loaded

1. Blue beaker = linked

2. Red beaker = any

If you forget to link the research encounters prior to the visit, you have 7 days after the visit to link the encounter to ensure the billing will be reviewed by CRB.

Follow this User Guide beginning on page 5.

1. Open "My Dashboard"
2. Click UC Research Coordinator/Research Dashboard
3. Run Post-Encounter/ Oops Bucket Report for Outpatient or Inpatient
4. Locate your Patient and double click
5. Link to the correct study

Important Notes:

- once patient has arrived for the day, you will find the visit in Oops Bucket
- If visit gets rescheduled, the link will move with the new date, however if the appointment was canceled and r/s, you will need to link it again



Post Visits / POST-Encounter (Oops Bucket)

RSH Patients - Outpatient Recent 7days Encounters · Just now

Report completed: Fri 8/25 03:21 PM

	Service Area	Total Encounters	Current Hour Linked Encounters
<div style="border: 1px solid #ccc; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> 0 </div> <p>Linked Outpatient Past Enc</p>	UCSD HEALTH SYSTEM SERVICE AREA	2,353	0
	08/19/2017	47	0
	08/20/2017	39	0
	08/21/2017	440	0
	08/22/2017	502	0
	08/23/2017	498	0
	08/24/2017	485	0
	08/25/2017	342	0
	Total count		2,353

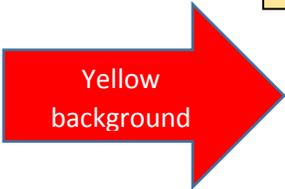
Open the report filtered for this row

RSH Patients - Admitted & IP/ED Recent 7days Discharges · 19m ago

Click to run the report

Report: Enrolled RSH patients - Linking IP/ED Admitted/RecentDischarged(w/in MinDays)

Note: You will notice a difference that distinguishes Post-Encounter/ Appointment from future visits because the header background is yellow in the Past Oops bucket.



Enrolled RSH patients - OP/Amb un-linked Past Encounters (w/in MinDays) [4156550] as of Mon 2/13/2017 9:53 AM

Filters Options Expand Research Studies Encounter Link to Study

Patient	SHLink	Date	Enrolled?	Appt Time	CSN	MRN	Has Mult?	Department	Prov/Res	Appt Status	Type	Linked Participant ID
Test, Jamie		02/10/2017		9:00 AM	33000010185	80000185	Yes	LWC FAMILY MEDICINE	INPATIENT-AMB RESIDENT (UCSD)	Arrived	OFFICE VISIT	
Test, Jamie		02/08/2017		1:00 PM	33000010036	80000185	Yes	LWC FAMILY MEDICINE	INPATIENT-AMB RESIDENT (UCSD)	Comp	OFFICE VISIT	

Link to Study

Linked	Study Code	Study	Status
<input type="checkbox"/>	101689	PRO00019865 (702): PROSPECTIVE MULTICENTER IMAGING STUDY FO...	Active/On Treatment
<input checked="" type="checkbox"/>	100995	MCH-02-001: A PHASE II DOUBLE-BLIND, PLACEBO-CONTROLLED STUD...	In Follow-Up

Accept Cancel

1. Dashboard
2. Schedule Future Visits Report. The top portion in the green is outpatient. The bottom portion in the green is inpatient future appointments.
3. The next section is Post-Visits Encounter Oops Bucket. The top portion in the pink is outpatient. The bottom portion in the pink is inpatient post encounters.
4. The brown section is where you can set up Custom Reports.

4. Understanding the Researchers/Coordinators Dashboard

On the dashboard, research teams can click on the blue hyperlinks from the dashboard screen and patient lists will appear.

The dashboard is titled "UC Research Coordinator/Researcher Dashboard" and includes a navigation sidebar on the left with icons for home, refresh, settings, and search. The main content area is divided into several sections:

- 1 In Basket Glance:** Shows a notification for "In Basket Glance" with a "Show only new messages" checkbox and a message count of 0.
- 2 Scheduled Visits / PRE-Encounter:** A report titled "RSH Patients - Outpatient Future Appointments" showing a total of 3,361 appointments. A table lists appointments by date from 08/18/2017 to 08/24/2017, with 0 linked appointments for each date.
- 3 Post Visits / POST-Encounter (Oops Bucket):** A report titled "RSH Patients - Outpatient Recent 7days Encounters" showing a total of 2,442 encounters. A table lists encounters by date from 08/12/2017 to 08/18/2017, with 0 linked encounters for each date.
- 4 Supporting Reports:** A sidebar containing a "Research Reports Template & User Tools" section with a list of report categories and a "Report Listing" section with checkboxes for "Report Listing" and "Research DB RW Reports".
- RSH Patients - Inpatient Scheduled Admissions:** A report showing a total of 170 expected admissions. A table lists admissions by date from 08/18/2017 to 08/23/2017, with 0 linked admissions for each date.
- RSH Patients - Admitted & IP/ED Recent 7days Discharges:** A report showing 115 IP/ER status entries. A table lists discharges by date from 08/12/2017 to 08/13/2017, with 0 linked discharges for each date.

5. Supporting Custom Report and Other Links

If a research team is managing several studies and wants to increase efficient report generation, a custom report can be set up once and used on a daily basis. With help to set up your custom reports, contact the CRB team.

Supporting Reports

Research Reports Template & User Tools · 6m ago ↻ ☰ ↗

- ▼ Research Linking Reports - Customizable
 - Linking Report - Op/Amb (Future) Appointments
 - Linking Report - Op/Amb (Past) Encounters
 - Linking Report - IP (Future) Admissions
 - Linking Report - IP/ER Discharges and Admitted
- ▼ Research Linking Reports
 - Linking Report - Op/Amb (Past) Encounters
 - Linking Report - IP (Future) Admissions
 - Linking Report - IP/ER Discharges and Admitted
- ▼ Research Study Management
 - Find Patients Associated with Research Studies
- ▼ Research Statistical Reports (Clarity/DWH)
 - Executive Statistical Report
 - Enterprise Revenue Cycle Report
 - Coordinator Statistical Report
 - Compliance Statistical Report
- ▼ UC San Diego Links and User Tools
 - Velos Production System
- > UC Irvine User Links and User Tools
- ▼ Government Sites
 - ClinicalTrials.Gov
 - NIH Grants
 - UCOP's Research Grants Program Office

Report Listing ☑

Research DB RW Reports · 6m ago ☑