1. **Patient Enrollment.** Patients must be associated with the study (enrolled) in EPIC prior to participating in study visits. See *Epic Tip Sheet - Maintaining Patient Participation Information* for the process details.

2. **Pre-Registration.** A *Pre-Registration form* (see attached) is completed at least 48 hours prior to patient visit. The form is sent by email (or fax) to the Central Scheduling representative assigned to Grady research patients. This individual registers the patient’s visit in EPIC as a “research” visit. Please see the form for the current representative’s contact information.

3. **Ordering the Lab/Procedure.** The PI (designee) enters the lab/procedure order into EPIC. The order should be coded as “research”.

4. **Research Visit.** When the patient presents on the scheduled day they should check in and identify their visit as a “research” visit. This will allow the visit to be appropriately associated in EPIC with the study.

5. **Visit Verification for Billing.** Within 24 hours after the patient visit is completed, the study team sends a *Patient Tracker Form* to OGA by email (grants@gmh.edu). This allows our office to make certain that the charge is captured appropriately for each patient.

**PLEASE NOTE:** If the study is utilizing ACTSI or other Grady departments; or the study involves in-patient services steps 2, 3 and 4 may vary. Please contact OGA with questions.
I. **Patient Enrollment**

**Step One**
1. Locate a patient record for a possible research participant.
2. Go to the patient “Research Studies” tab in the patient chart. *(See figure 1 - Research Study Summary View)*
3. Locate the study by entering the unique Plan Code (the study’s Plan Code is located on the ROC approval letter). Choose “Add” or enter, which takes you to the Research Studies Detail View *(See figure 2)*.

[Figure 1. Research Study Summary View]

**Step Two**
Enter/Verify the required information in each field.
1. **Study** – Verify the patient is being enrolled in the correct study.
2. **Status** – Indicate the appropriate enrollment status (i.e. enrolled, interested etc.).
3. **Active Start date** – Indicate the date that the patient was enrolled into the study.
4. **Comments** – Enter any comments related to the patient enrollment process.
5. Choose “Accept” to complete patient enrollment.
Step Three

1. Verify patient enrollment information in Research Study Summary View (See figure 3)

II. Patient Disenrollment

When the patient ends participation in the research study go to the Research Study Detail View in the patient chart and do the following:

1. Status – update patient status (i.e. withdrawn, completed)
2. Active end date – indicate the date that participation ended
3. Verify status change in Research Study Summary View