

MANAGING PATIENT ENROLLMENT EPIC TIP SHEET

I. Patient Enrollment

Step One

1. Locate the patient's medical record in Epic
 - a. If a potential participant does not have a Grady medical record or medical record number (MRN) the Study Personnel should facilitate the financial counseling process at Grady for the patient. Please refer to the [MRN Request Form](#) for guidance.
2. Go to the "Research Studies" tab in the patient's chart. (See figure 1)
3. Locate the study by entering the unique CT Plan Code in the box "Add study". The study's Plan Code is located on the ROC approval letter. Choose "Add" or enter, which will take you to the Research Studies Detail View (See figure 2).

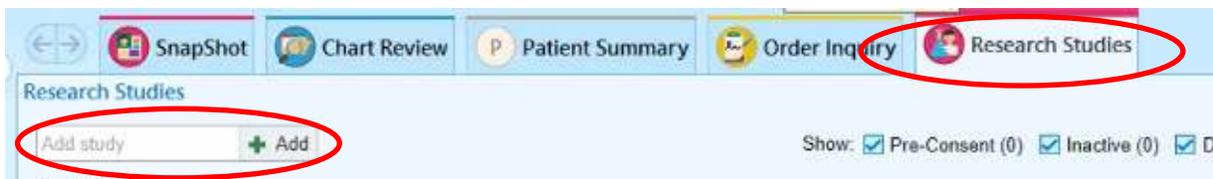


Figure 1

Step Two

Enter the required information in each field. *Denotes required information

1. Study ID / CT Plan Code* – Verify the patient is being enrolled in the correct study. The CT Plan is chosen in Step One.
2. Participant Details* - Provide the Status & Start Date
 - Indicate the patient status as 'enrolled'. Other status options do not facilitate appointments being scheduled for research.
 - Indicate the date that the patient was enrolled (consented) into the study.
3. Participant ID / Coordinators / Comments – **Do NOT** enter any information in these fields. It is not required for the billing process.
4. Choose "Accept" to complete patient enrollment.

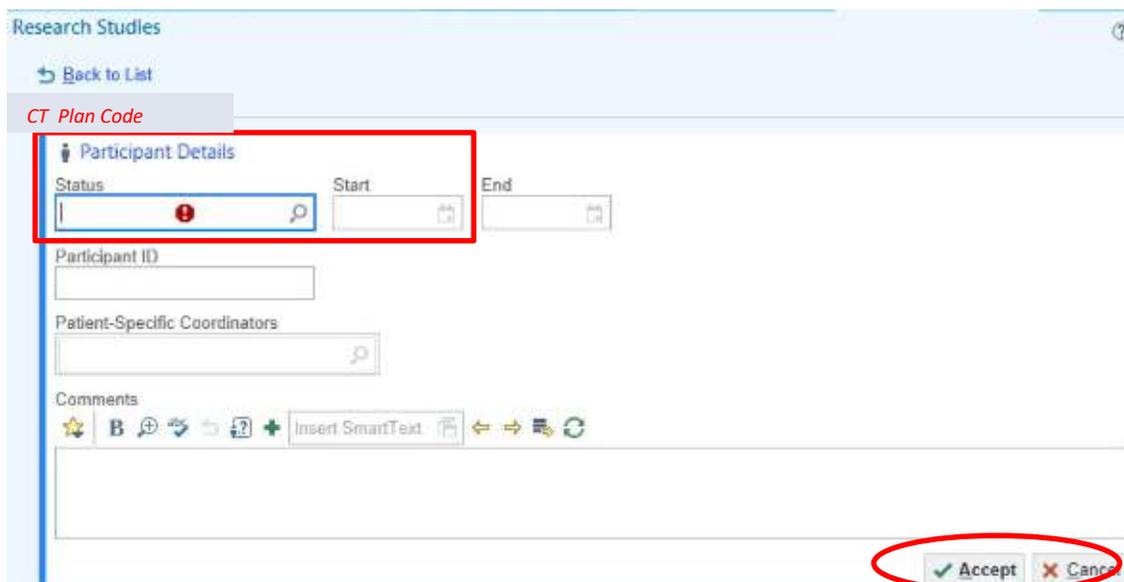


Figure 2

Patient Enrollment Cont.

Step Three

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

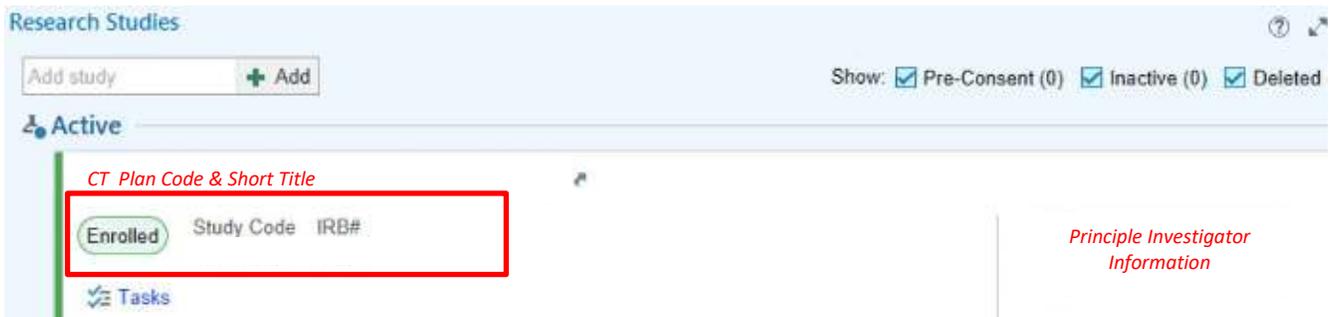


Figure 3 – Research Study Summary View

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 the patient’s status (i.e. withdrawn, completed).
2. End Date*– indicate the date that participation ended
3. Verify status change in *Research Study Summary View* (figure 3)

IMPORTANT: Accurate patient enrollment and disenrollment in Epic is required for accurate billing.