

Clinical Research Coordinator – View and Link Research Encounters

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View upcoming appointments for study participants

Scheduling staff can link an encounter to a study during the scheduling and registration process. Encounters should be linked before the visit begins to ensure that the patient and the study are billed appropriately. You can proactively monitor these visits and check their linking using reports.

View upcoming appointments for research study patients by creating a custom report for your study.





1. From the dashboard, click the dashboard name and then click **Show Catalog**.
2. Search for "research."
3. Click the "ES Appt Search for Research Coordinators" report template.
4. On the **Criteria** tab, select your research study and enter a status of enrolled.
 - Note: Only include the statuses that you need.
5. On the **General** tab, rename the report to reflect the new criteria and save the report.
6. Click **Run** to see the report's results.




To find your report quickly in the future, save it as a favorite by clicking ☆ next to it in your search results.

Verify and link upcoming visits to studies


Verify and link from a report


1. Run a version of the ES Appt Search for Research Coordinators report.
2. Select an appointment.
3. Click  **Link to Research Study** on the report toolbar.
 - a. Click  Link encounter next to the study to which the appointment should be linked.
 - i. If the study is using timelines, add a specific day to link the encounter to in the timeline.
 - b. Click  to unlink an encounter from a study.
 - c. Click  **Close** when all updates for the encounter are complete.

Link encounters from Appointment Desk



1. Click **Appts** on your main toolbar.
2. Look up your patient and click **Accept**.
3. Right-click the upcoming appointment.
4. Select **Link to Research Study** to confirm association or to link the appointment to the research study.
5. Click  **Close** when all updates for the encounter are complete.

View linked encounters & link encounters in Chart Review

Click  **Research Studies** on the main toolbar and select a patient enrolled in your research study then open **Chart Review**. Clear the **Hide Add'l Visits** check box to view upcoming visits.

An  icon appears in the **Research** column for encounters linked to a research study.

If a visit is not linked to a research study:

1. Single click the encounter.
2. Click  **Encounter** in the Chart Review toolbar.
3. Click the **Research Studies** tab.
4. Click  **Link encounter** in the Research Studies activity.



You can link past visits in Chart Review but visits should be linked as soon as possible and before the account is billed to ensure the charges are directed properly.

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