I. **SCOPE**

The SOP applies to research studies that will have patient care services performed in LUMC facilities. The purpose of encounter linking is to better inform the research billing process, to provide greater context on the reason for the visit to providers and staff, and to enable study-level reporting.

II. **PROCEDURES**

1. The Principal Investigator or his/her designee ("Study Team") ensures patient encounters related to a research study are linked to the study in Epic when necessary.
2. An Epic encounter refers to each time a patient presents to a hospital or clinic. Inpatient stays are one encounter even if the patient is admitted for several days or weeks.
3. The patient must be associated to the study before an encounter may be linked to the study.
4. Encounters are to be linked when any of the following apply:
   a. The encounter includes one or more patient care services listed on the coverage analysis (CA) for a qualifying clinical trial, and the service is performed before the deactivation milestone listed on the CA.
   b. The encounter includes a patient care service to be billed to the research study.
   c. The encounter includes treatment or diagnosis of an adverse event that has been determined to be related to the study or may be related to the study. If the adverse event has been determined not to be related to the study, the encounter should not be linked unless other criteria apply.
5. It is critical that the encounter is linked at the appropriate time. There is no value to linking an encounter after it is closed.
   a. Outpatient encounters are to be linked before the encounter is opened (patient checks in). At the latest they are to be linked before the encounter is closed (provider closes the encounter).
   b. Inpatient encounters are to be linked before the encounter is opened (patient is admitted) if possible, and at the latest before the encounter is closed (patient is discharged).
   c. If an encounter is not linked timely, email Revenue Integrity to inform them of the encounter that should have been linked.
6. Encounters may be linked through Reporting Workbench, Research Studies, Appt Desk, and Registration. See Epic guidance document for step-by-step guidance.

III. **ASSOCIATED DOCUMENTS AND FORMS**

A. PAT-002 Associating Patients in Epic for Research Billing
B. Epic guidance document

IV. **APPROVALS**

[signature]   1/25/19

LUMC EVP, Clinical Affairs (or designee)   Date

[signature]   1/14/19

LUC Senior Director, Clinical Research Office (or designee)   Date