Research – Epic FAQs for OnCore and Epic

This document covers many FAQs pertaining to Oncore and Epic.

How do I add my subject to the study in Epic?
- Patients cannot be added to the study in Epic.
- They must be added in OnCore first under the CRA Console > Register Subject.
- A subject can be added in OnCore and still not appear in Epic until the subject has a Consent signed date.
- Once this is added, OnCore will send the subject to Epic automatically.

Am I to review charges in Epic or OnCore?
- Charges are to be reviewed in Epic only, no charges will be sent to OnCore (this is not like uTRAC).

How does Epic know to hold charges, do I add a start and stop date in OnCore?
- No, but the Consent Signed date begins to route charges for review until the Off Study Date is entered in OnCore. These two timepoints act as the start and stop date in Epic.
- These timepoints will include study and non-study related visits.
- Patient Billing End Date is another stop date in OnCore that will stop charges in Epic from being routed as part of the study. This will not change the subject status as would the Consent Signe date and Off Study date.

My subject is showing as not eligible in Epic, but they screen failed
- Any changes to a subject status must be done in OnCore.
- Review the Subject console > Follow-Up tab > Off Study Reason > Select Screen Fail.
- Make sure to add a date under the Off-Study Date.

Here is how OnCore works with Epic
- Register a new subject – no push to Epic until Consent Date is entered.
- Consent > Signed Date entered – must be after the trial is Open to accrual & current Informed Consent is available.
- Eligibility > Status Date entered – must be after the Consent date.
- On Study > Date entered – must be after the Consent date.
- Treatment > On Arm & On Treatment Date – must be after the Consent date.
- Follow-up > Off Treatment or Follow-up Date – must be after the Consent date.
- Follow-up > Off Study Date – must be the final date subject will no longer have study visit or treatment. This will place a stop in Epic.
- Follow-up > Patient Billing Complete Date – enter the date the subject completes all Epic Billable procedures. This will create a stop date in Epic, but subject will still be on the study record.

How do I re-enroll a subject to Epic?
- Re-Enrollment can only be done in OnCore and if the PC Console > Main > Management > Allow Duplicate Enrollment is selected.

How do I review charges in Epic work queue? Where is the Work queue?
- Work queues no longer exist in Epic, but charges are now viewed under reports either under the Study Team or Biller Review.
- See Research - Accessing the Study Team Review Report and using Filters

I can't access the Biller Review Dashboard?
- Have you completed the Epic: Research Study and Charge Review training?
- If so, submit a Service Now ticket for Epic to verify training is completed and request for an Epic account has been submitted.
- If you have access to Epic but unsure to access the dashboard, please see tip sheet https://pulse.utah.edu/site/ITT/epic-specialties/research

I can't access the Research Coordinator Dashboard?
- Have you completed the Epic: Research Coordinator training?
- If so, submit a Service Now ticket for Epic to verify training is completed and request for an Epic account has been submitted.
- If you have access to Epic but unsure to access the dashboard, please see tip sheet https://pulse.utah.edu/site/ITT/epic-specialties/research

How does the Coordinator do both the Study Team and Biller Review?
- Coordinators cannot sign off as the Study Team and Biller Review for a charge on the same study.
- Coordinators by default are listed on the study maintenance record in Epic and will be the Study Team Review.
- Biller Review should be staff who are not on the study record in Epic but listed on the study record in OnCore (See "The following OnCore Roles DO NOT Push to Epic" list).

The following OnCore Roles DO NOT PUSH to Epic:

Affiliate Coordinator	Protocol Creator
Affiliate Lead Coordinator	Registry Creator
Affiliate Lead Investigator	Regulatory Coordinator
Affiliate Sub-Investigator	Regulatory Start-Up
Clinical Site Monitor	Satellite Site Coordinator
Enrolling Coordinator	Sponsor Site Monitor
Enrolling Physician	Study Site Contact
Financial Analyst	Study Staff
Program Manager	Treating Physician
Project Administrator	

The following OnCore Roles DO PUSH to Epic:

Clinical Pharmacist	Data Manager
Clinical Research Associate	Lab Specialist (Primary)
Clinical Research Nurse	Lab Specialist (Secondary)
Clinical Trial Coordinator	Other Staff

Physicist	Research Assistant
Post Award Billing Specialist	Research Data Coordinator (Primary)
Primary Clinical Pharmacist	Research Data Coordinator (Secondary)
Primary Clinical Research Associate	Secondary Compliance Officer
Primary Compliance Officer	Study Coordinator
Principal Investigator	Sub-Investigator

Who can do the Biller Review?
- Staff who work for the department but are not listed on the study record in Epic.
- See "The following OnCore Roles DO NOT Push to Epic".

I reviewed the charges in Epic as a Biller Review role, but it keeps overriding the previous staff who last reviewed, why?
- You may be listed on the study record and this will override the previous staff who completed the Study Team Review
- Check OnCore to see if you're in a role that does not push to Epic, see FAQ "The following OnCore Roles DO NOT Push to Epic" for a list
- Make the necessary changes to staff role in OnCore and the study record will be updated in Epic the following day

I can't see my active studies in Epic
- Check OnCore to see if you're listed as a coordinator or in a role that pulls over to Epic
- Still unable to see "My Active Studies" - Submit a Service Now ticket for Epic IT team to check Epic issues via: https://uofu.service-now.com/it?id=account_management
- Select Report an Issue

How can I set the report to only show me my department or studies?
- See Epic Tip sheet for "Research – Accessing the Biller Review Report and using Filters" or "Research – Accessing the Study Team Review Report and using Filters"

I've marked the checkboxes and clicked on the Research Correction, why isn't the correct study account displaying
- Make sure to select "Show Inactive Studies"
- Make sure that you click on the magnifying glass to search all trials.
- Select correct study
- Complete Bill To: Study or Patient/insurance
- Patient/Insurance make sure to select either Routine (Q1) or Investigational/Device (Q0)
- See Epic Tip sheet Research - Review Charges with the Research Study or Billing Review Activity

I see duplicate charges in Epic, how do I correct
- For duplicate charges, please submit an InBasket email in Epic to CRSO

A visit was not linked to the study and billed to patient's insurance, how do I correct this to be billed the study

- Review OnCore to ensure subject is registered to study, once registered and consent date entered, subject will appear on study record in Epic. See tip sheet on Subject Management – Register a Subject: https://ctsi.utah.edu/crso/oncore/tip-sheets-sops
- If subject was enrolled to study and still billed incorrectly, review Epic Tip sheet Scheduling – Linking an Appointment to a Study to ensure subject visit is linked to study
- Submit an InBasket email in Epic to CRSO to correct charge

How do I send charge corrections?
- See tip sheet for Research - Review Charges with the Research Study or Billing Review Activity
- Charges that have been reviewed by both the Study Team and Biller Review and still need to be corrected, must be sent through InBasket Epic email system to CRSO.
- Charges that do not have a checkbox to make correction, submit an InBasket Epic email to CRSO to correct.
- Charge will re-appear for review and signoff

Who do I contact at EPIC IT to get my dashboard setup?
- Submit a Service Now ticket to contact Epic IT team to check your security. https://uofu.service-now.com/it?id=account_management
- They have to ensure you have completed the necessary courses for dashboard setup.

How quickly are updates in OnCore pushed over to Epic?
- Protocol updates are sent over on a daily basis.
- CRSO Finance team receives a list of HSC trials that need to be sent over.
- HCI team receives a list of HCI trials that need to be sent over.
- Subject updates are sent over automatically to Epic

How do I only see the study related charges?
- Subjects enrolled in a study will have both the study related and non-study related charges drop on their account.
- Both have to be reviewed.

Why are there so many charges in Epic?
- Charges are dropped by the billing department on a daily basis.
- Charges must be reviewed weekly to ensure no outstanding balances are pending.

Why isn't my calendar available to link to timeline?
- Confirm calendar was released in OnCore
- Reach out to the CRSO Finance to ensure calendar was pushed to Epic.
- See tip sheet on releasing calendar: Research – Release Protocol
- Once calendar is released then you can link to subject timeline; see tip sheet: Research – Research Coordinator Generate and Apply a Timeline

I keep having to review the same charges in Epic under the same encounter
- Charges that have been reviewed by both the Study Team and Biller will have a checkmark to indicate charges are complete

- New charges drop into Epic for the date of service sporadically (all dependent on Utah Medical Billing and Revenue Cycle Support Services workflow to get charges posted to Epic)

I thought OnCore had to be setup with financials before I could release charges in Epic?
- The financial chart field does need to be valid in OnCore to ensure Epic charges are billed to the account.
- If there is a calendar but not released, charges still need to be reviewed in Epic.
- Once calendar in OnCore has been completed and released to Epic, this will help with routing charges to the Study Related or Non-Study Related buckets.
- Charges still need to be reviewed in Epic