**HOW TO LINK AND UNLINK PATIENT IN EPIC
AND COMPLETE VISIT IN CLINICAL CONDUCTOR**

Linking in EPIC
- Study Coordinator - link patient to study in EPIC using the consent date as "Active Date"
  - Once linked,
    - the patient demographics interface (uploads patient information) to Clinical Conductor (*Automatically*)
    - All charges are held in research billing work que until reviewed and validated (research related or not)
  - Patient must be linked to study **BEFORE** the service is done
    - to avoid improper billing
    - to avoid unnecessary work at the back end to recall, refund and reissue claim(s)

Unlinking in EPIC
- Email Sheila when patient(s) are "Off Study" (Early Term, Withdrew, Expired, or Completed)
  - Sheila is the only person that can unlink patients from study.
  - Unlinking timely helps control the unnecessary claims going into research billing work que.

Impact of Monthly Patient Log
- The monthly patient log review summary is reported and tracked by Compliance.
  - Each missed link or unlink is counted as error.

Completing visit in Clinical Conductor
- If a patient is linked in the study through EPIC – patient demographics will automatically transfer to Clinical Conductor.
  - Study Coordinator must complete the visit in Clinical Conductor Site within 3 days after the service is done.
  - Don't forget to update "Patient Status" (if needed)
- Patient information will not be in Clinical Conductor if patient is not linked in EPIC

Missing visit(s) or element(s) –
- submit request to Erin Nichols at enichols@Queens.org
  - cc Rebecca Ohta at rohta@queens.org, Sherleen Bettis at sbettis@queens.org and Sheila dela Cruz at sdelacruz@queens.org
  - Don't forget to provide source document.

QUESTIONS/CONCERNS:
Please contact   Sheila dela Cruz at 808-691-7409 or sdelacruz@queens.org

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