Associating research participants to a study is required for accurate research billing and adjudication of research-related charges. This activity can be found under the *Quick Launch to Research Activities* – **“Patient Research Studies.”**

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| Try It Out | Try It Out |

1. Start by clicking **“Patient Research Studies”** under the *Quick Launch to Research Activities* dashboard component. This is located on the right side of the dashboard.
2. Search for the participant by MRN (T0#) or name (last name, first name). Click “**Find Patient**.” If there is more than one option, ensure to choose the research participant that has consented to the study and click **“Select.”**



1. Click the **“+Add”** and select the correct study from the list. Click “**Accept.**” Note that the list that appears displays ONLY the studies that the user has been granted access to.



1. Two data elements are required for Participant/Study Association: *Status* and *Active Start Date.* Click the **magnifying glass icon** next to the *status: box* and choose the option that best describes the participant’s current enrollment status. NOTE that research billing ONLY works when the participant has been placed in the *Consented/Enrolled* status. Click **“Accept.”** *Active Start Date* is defined as the

date of the research participant’s date of consent. To document, Click the **calendar icon** next to the A*ctive Start Date: box.* Choose the correct date and click **“Accept**.**”**



5. To complete the participant/study association, a timeline should be generated. A timeline creates a PROPOSED study visit schedule based on the protocol calendar built by HealthONE. A timeline ensures that research billing is accurate. Click the **“+Add to Timeline”** to create a research participant timeline. To begin, enter the *From Date*. The *From Date* should align with the first actual study visit. Once the *From Date* is entered,click the “Tab” button and always choose “**Set Subsequent Dates**” to auto-populate the rest of the proposed visit schedule. Click **“Accept”** to finish.

