



Epic Updates and Tips for Researchers

Training

Before obtaining any Epic access, users must be assigned an Epic Job Role in the Epic Validation Portal by their department's portal security contact. Visit the [Epic FAQs page](#) for information about your department's security contact and other Epic training information.

Tip Sheets and Guides

Research staff should always refer to their research learning home dashboard in EPIC for tip sheets, guides, and other information on how to do things in Epic. If you are unsure how to access your learning home dashboard, please [refer to this tip sheet](#). New tip sheets and guides that have been posted will be called out in the "What's New" component on the learning home dashboard.

What should go in Epic?

Research studies should go into Epic if the study includes:

- **Safety** - use of an investigational device or medication
- **Ordering/Resulting** - ordering of services for research (e.g. labs, radiology, cardiology)
- **Billing Risk** - has a billing component or risk

If you previously recorded participant consent in the Billing Matrix, this consent **must now be documented in Epic** as a patient-study association. The patient-study association must be documented in Epic **within 24 hours of patient consent**.

Why does my consent have to go in Epic?

Medicare and other private insurance companies have set up requirements surrounding billing for services that are provided in the context of some research studies. Any charge for a standard of care service that is done in the context of certain research studies must include specific information such as the NCT.gov number and other specific codes. Some research study services are paid for by the grant or sponsor. If those services were also billed to Medicare or another insurance company, that would constitute fraud. Whether the services in the study are standard of care or to be billed to research, there are billing requirements.

In order for a biller at the hospital or WashU School of Medicine to follow these requirements, they must be able to identify that a patient is on a study, and for which study the patient has consented. Associating the patient to the correct study in EPIC, as stated above, and recording the date of consent in the active start date field is the main and most important step in getting this information where it needs to go within the billing process.

How does my study get in Epic?

An Epic1 Research survey will be sent to you to complete once your study has been approved by the IRB. This will provide us with information to build your study, medication, and/or ordering tool in Epic. **Please complete this survey within 24 hours. Your study has to be built and activated to be visible in Epic.** If your study is awaiting approval, you can contact the Epic1 Research Team, and they will send you a survey. You can also complete the Epic Intake Form found on the Research Home Dashboard. **Your study will not be ACTIVATED in Epic until it has approval and is sent from MyIRB.**

For additional information please contact the Epic1 Research Team at epic1research@wustl.edu.