Research Study Timelines

When you enroll a patient in a study with a defined billing protocol, you can generate that patient’s timeline. A patient’s study timeline includes the date ranges when each set of charges is expected to occur. Timelines help the system determine where to route charges. These charges generally correspond to specific study visits or a related group of study visits. Protocols are built in OnCore and pushed to Epic.

Apply a Timeline

1. Click Research Studies then search for and select your patient.
2. Click on the title of the study.

3. Click **Create a Timeline** in the Study Calendar section.

4. If there is only one billing calendar for the study, it will appear automatically. Select the protocol for the study then click **Accept**.
5. Enter the date for the first/baseline visit and hit enter. **Select Set Subsequent Dates** in the pop-up if you want Epic to automatically enter the visit dates based on the protocol timeline expected dates. After all dates are filled out click **Accept**.

6. The Study Calendar reflects if a timeline has been applied. Click **Timelines** to view.
7. Edit, View, or Delete the protocol. Click Create a Timeline to add an additional timeline, if applicable to the study.