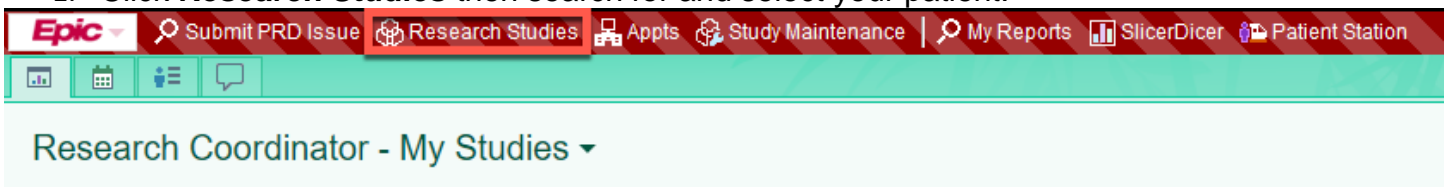


# Research Study Timelines

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.

The screenshot shows the 'Research Studies' interface. At the top, there is a navigation bar with tabs for 'Chart Review', 'Synopsis', 'Results Review', 'Demographics', 'Document List', 'Research Studies', and 'Order Review'. Below the navigation bar, the title of the study is 'A Study of Vericiguat in Participants With Heart Failure With Reduced Ejection Fraction (HFrEF) (MK-...'. Underneath, there is a 'Participant Details' section with fields for 'Status' (On Study), 'Status Effective Date' (3/10/2023), 'Active Start Date', and 'Active End Date'. Below this is the 'Study Calendar' section, which displays a landscape illustration with a stethoscope icon and the text 'No study visits'. A red box highlights the '+ Create a Timeline' button.

4. If there is only one billing calendar for the study, it will appear automatically. Select the protocol for the study then click **Accept**.

The screenshot shows the 'Create a Timeline' dialog box. It has a title bar with a close button (X). Below the title bar, there is a section titled 'Select a protocol'. This section contains a table with the following data:

Name	ID	Protocol Order
Summit-224 (Ver. 4 of 4)	56	0

At the bottom of the dialog box, there are two buttons: 'Accept' (with a green checkmark icon) and 'Cancel' (with a red X icon). The 'Accept' button is highlighted with a blue border.

- 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**.

**Edit Summit-224 (Ver. 4 of 4)**

Day	Expected	Tolerance
IDL test (Length in days: 24)		
Baseline	- (-0/+6)	3/16/2023 to [Warning]
Visit 2	- (-6/+7)	[Warning] to [Warning]

**Participant Study Calendar**

Would you like to set subsequent dates based upon the study protocol?

**Set Subsequent Dates** | Only Set Current Date

Accept | Cancel

- The Study Calendar reflects if a timeline has been applied. Click **Timelines** to view

**Research Studies**

[View Study List](#)

**A Study of Vericiguat in Participants With Heart Failure With Reduced Ejection Fraction (HFrEF) (MK-**

**Participant Details** | Additional Info | Past Updates

Status: On Study | Status Effective Date: 5/25/2022





Active Start Date: 5/25/2022 | Active End Date: —

**Study Calendar** | **Timelines (1)** | Hide Past


Study Visit	Date	Encounter Type	Dept	Provider
Past				
Baseline (5/25/2022 to 5/31/2022)	5/27/2022	New Patient Appointment Visit - Completed	CLIFTON B1 GASTRO	Anand Sagar Jain, MD
Visit 2 (6/1/2022 to 6/14/2022)	6/7/2022			

7. **Edit, View, or Delete** the protocol. Click **Create a Timeline** to add an additional timeline, if applicable to the study.

Timelines ✕

Name	Actions
 Summit-224 (Ver. 4 of 4)	 Edit  Preview Protocol  Delete

[+ Create a Timeline](#)

 OK