



Common APeX Tasks for Clinical Researchers

Be sure to log on to Department: **Research SVC**

APeX

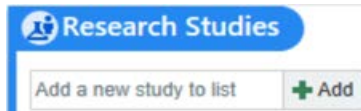
New APeX builds/ZZ acct requests should be sent to the OCR at clinicaltrials@ucsf.edu.

To request APeX access, change or **add new CRC** to study build, place an IT ticket here: https://ucsf.service-now.com/ess/apex_requests.do (Routine/Maintenance)

For more info, see APeX Knowledge Bank: <http://myapex.ucsf.edu/researchcrc>

Associate Patient to Study

In chart review for your patient, select Research Studies. In top left corner enter the ZZ study name and then complete status and start date.



Active: Enrolled/On-Study

Inactive: Complete/Off-Study

Upload Consent



Scan the full consent form and HIPAA and save file to UCSF Shared Network location/PHI drive. Then select Epic > Patient Care > Media Manager and select your patient. Click on Import and then select scanned consent file.

*Consent uploads are **REQUIRED** for any patients undergoing recurring research procedures at UCSF Med Ctr.*

Create and Pend Orders

Please see **User Guide** for detailed steps of inpatient and outpatient instructions: <http://myapex.ucsf.edu/researchcrc>

Orders should be under existing encounters if possible, otherwise create an orders only encounter.

For outpatient: Under encounter: Go to EPIC > Patient Care > Encounter > Select Patient, select desired date, then Order Entry. Search for order and Accept. Be sure to click **Research Association** then Add **Diagnosis** (Z00.6 and primary medical diagnosis). Then **Pend Orders**.

Link Encounter



Outpatient: EPIC > Scheduling > Appts > Select Patient. Under Future select correct encounter date and right click to select Reg Appointment Contact.

Inpatient: EPIC > Scheduling > Appts > Select Patient. Under Admissions select correct and right click to select Registration.



This tip sheet should be used for reference only. Please complete available trainings and use the CRC **APeX User Guide** for detailed instructions and any questions. For the User Guide and more information please see the **APeX Knowledge Bank**: <http://myapex.ucsf.edu/researchcrc>

Monthly ZZ Report Review:

You or your department administrator/research finance analyst will receive this PDF of all charges that have hit the research fund (ZZ account) each month. Work with your finance staff to:

1. Confirm COA/chartstring and funding source are correct (non-profit/industry)
2. Confirm the charges are correct patient/date/procedure

Tasks To Do Monthly:

- Run reports to update patient status to complete/off-study (This is **important** so that clinical billing is no longer being held for research review!)
- Update ZZ account with any changes to staff, COA, etc.



To Do Before Study Closure:

When your study is complete and/or all billable procedures have been completed, you should **close out** the study in APEX.

Be sure that:

1. All patients moved to complete/off-study status
2. All billable procedures have occurred
3. Allow 30 days for all charges to be finalized. *This will assure no additional charges are routed.*

Once you have completed those steps please email Barbara.Maury@ucsf.edu to request the study be closed.

Other Useful Reports for CRCs:

- My research patients - simple REP0021183
- UCSF Find Patients Associated with My Research Studies
- All Research Studies for CRCs REP0059458

Important!

Obtain Copy of Coverage Analysis/Billing Grid



Make sure you have your billing grid handy when linking encounters and orders to your study! If you don't have access to OnCore or need a copy of the study billing grid, please email the **OCR** at clinicaltrials@ucsf.edu to request a copy for your files!

Amendments to Study Procedures

Often the study protocol will be revised and will require an update to the budget, IRB application, consent forms and/or coverage analysis. Please email the **OCR** at clinicaltrials@ucsf.edu to initiate any protocol amendments or modifications