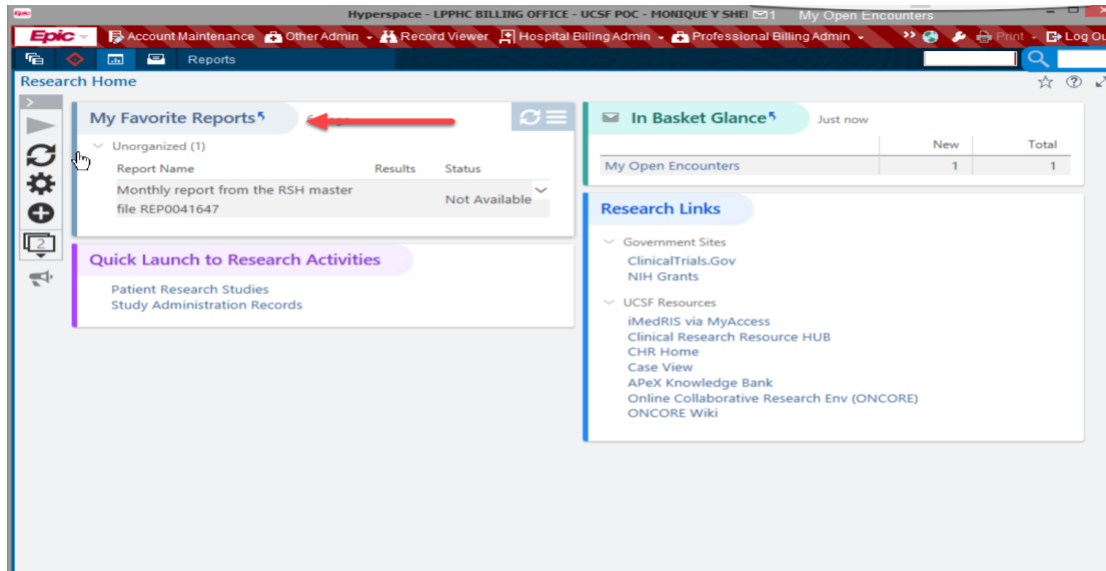


The “UCSF ES APPT. SEARCH FOR RESEARCH COORDINATORS” Report is method of ensuring research patients’ encounters are linked. This is accomplished by running the **UCSF ES Appt Search for Research Coordinators** report. This report can run from the “My Report” section on the **Research Home Page**.

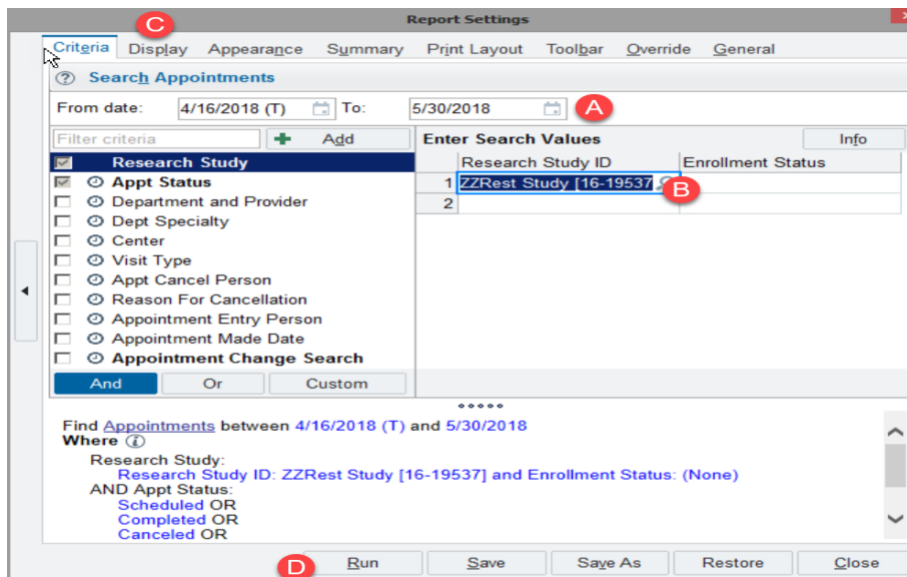
1. Click on the “My Favorite Reports” to locate the specific report.



- Type “UCSF ES Appt” in the search field of the report library Figure 1- Identifying the UCSF ES Appt. Search for Research Coordinators Report in the Library of reports



- Click on the “new report” button on the right side of the highlighted report



The report settings window will appear. The report can be customized by adding the date range of specific appointment dates (A), Research Study ID (B), and changing the display of columns (C). This allows you to view all your patients' upcoming appointments, specifically for a research study. After all of the desired criteria is entered, Click “Run” (D) to view the report.

After running the report, the report will show all appointments for a specific time-period and specific study. **NOTE:** This report can be run prior to the visit, you should use the report results to actually LINK a study to the encounter or verify if the encounter is currently linked to the encounter. **This report can be run anytime.** It is also a good way to verify linked encounters.

Temporary report setting [1061] as of Mon 4/16/2018 1:12 PM

Filters Options Expand Appts Research Studies Encounter Link to Research Study Registration

Patient	MRN	Date	Appt Time	Department	Prov/Res	Appt Status	Type	Linked Participant ID	Linked
Research, Moni	97592020	05/16/2018	10:00 AM	OB MISSION BAY	CPSP PROVIDER OB GYN	Sch	FOLLOW UP OB		

Research Study Report

Research Study Linked to Appointment on 5/16/2018

No research study is linked to this encounter.

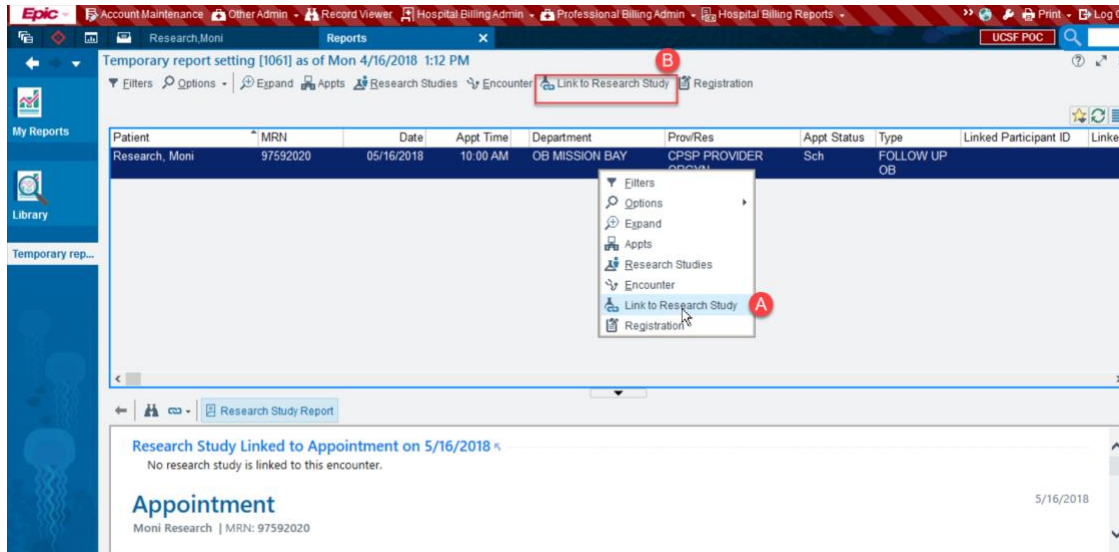
**Appointment**

Moni Research | MRN: 97592020

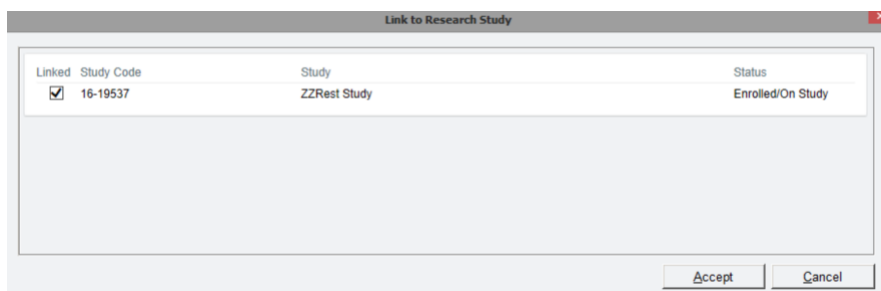
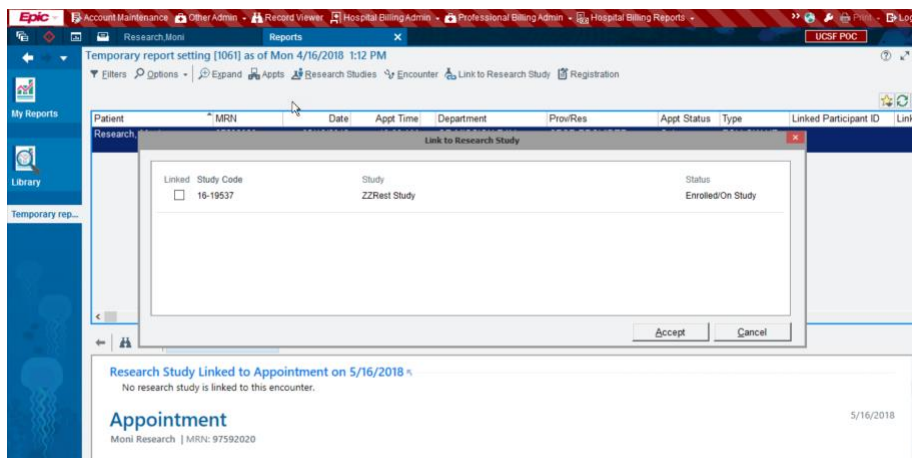
5/16/2018

1 of 1 results loaded

- To Link encounters to a study directly using this report, **Click** on the patient's encounter you wish to link. You can either right click to **"Link to Research Study" (A)** or scroll up to the heading and **Click** on the **"Link to Research Study" button (B)**.



- Click on the designated study in listed in the box



- After linking encounter to study directly from report, you can verify the encounter linkage from the report.



**NOTE:** After the encounter is linked, the research icon will appear on the report.

Patient	MRN	Date	Appt Time	Department	Prov/Res	Appt Status	Linked Study Name	Linked Study ID
Research, Moni	97592020	05/16/2018	10:00 AM	OB MISSION BAY	CPSP PROVIDER OB GYN	Sch	ZZRest Study	16-19537



**NOTE:** The task of linking an encounter to a research study is now complete. This is a very simple and effective way to ensure patients' encounters are linked to the correct research study. As mentioned before, this report can be run on a daily basis. It is important, as a CRC, to incorporate this report in your daily workflow.