OnCore / Health Link Interface:

Patient information is sent from Health Link to OnCore (ADT)

Information about patient participation on a study is sent from OnCore to Health Link (RPE)

Demographics Interface (ADT):

- Allows patients from Health Link to be selected when using the **Find** button on the New Subject Registration Page.
- Populates the following from Health Link:
  - Basic demographic information (name, DOB, address, email/phone, etc)
  - See handout for complete list of interfaced fields

Demographics Interface (cont’d):

- New patients created in Health Link are immediately available to be added as subjects in OnCore
- Demographic information changed in Health Link is updated every hour in OnCore (name changes, etc.)
  - Research staff will receive notifications of major changes (last name, DOB)
  - Race & ethnicity initially populated, but not updated subsequently

Subject Study Enrollment Interface (RPE):

- OnCore notifies Health Link of patient participation in studies
  - Attaches subjects in OnCore studies to study record in Health Link
  - Updates subject status in Health Link throughout protocol participation
  - Inactivates subjects in Health Link who stop study participation

Subject Study Enrollment Interface (cont’d):

- Automates most existing OnCore subject notifications, allowing immediate updates
- Subject study enrollment interface only used for studies with UWHC/UWMF billing (and only for UW Madison subjects)
  - Interface data only available to Health Link Billing Staff
Why Interface?

- Streamlines process of entering Health Link patients into OnCore
- Attaches OnCore subjects to Health Link studies quickly and automatically for billing purposes
- Ensures that Health Link (patient’s legal medical record) and OnCore contain identical subject demographics and study participation records
- (Future Plans) Will provide clinicians basic information about patient study participation

(Future Plans)

View for Clinicians in Health Link

- Patient header can display Active/Inactive research status
- Study information displayed in Health Link:
  - Patient’s status (e.g. consented, on study)
  - Title and short title

Interface Workflow – Study Creation

- A study record will be created in Health Link during OnCore’s SMPH Review (for protocols with UWHC/UWMF billable procedures)
- IRB#, Short Title, and Title (study description) sent to Health Link
  - Stigmatizing studies will be de-identified prior to creation in Health Link

Example – Study Creation Workflow

Interface Workflow – Updates to Study Data

- Changes to IRB# or significant changes to Short Title and Title for interfaced studies should be communicated to Nancy Lutz
- Failure to communicate changes to Nancy may generate errors
  - Research staff will be contacted to resolve errors
**Interface Workflow – Which Subjects Will Interface?**

- Only UW-Madison (including 1 SP) subjects will be interfaced

**Interface Workflow – Attaching Health Link Patients to Studies**

1. Obtain UWHC MRN (if subject does not have one)
2. Using the **Find** button, search for and add the subject to OnCore
3. Document the subject consent in OnCore

**Interface Workflow – Attaching HL Patients to Studies (cont’d)**

- Alternate methods for attaching subjects if consent date is not entered in OnCore in advance of scheduling billable procedures:
  1. Submit a **Manual Subject Registration Notice** (Requires 24 hours notice- ICTR OnCore ONLY)
  2. Contact Special Patient Billing

**Interface Workflow – Stigmatizing Studies**

- New study screening question added to OnCore
- If stigmatizing, OCT will de-identify prior to sending to Health Link
- Short title reflected as “C-” and backwards acronym (e.g. WRAP = “C-PARW”)
- Study title (description) reflected with generic title: “Volunteer on research protocol. Refer to FYI for study contact information if needed.”

**Interface Workflow – Ordering and Billing Research Procedures**

- When scheduling UWHC/UWMF visits, notify the scheduler if they are study-related
- All study-related orders should be associated with the V70.7 diagnosis code
- A Billing Slip must be sent within 24 hours of the visit

**Example – Subject Creation**

- If the patient is not available after clicking the **Find** button, **Patient Registration** is contacted to get an MRN.
- **Interface immediately sends subject data to OnCore**.
- **Research staff can find subject in OnCore using Find button**.
Example – OnCore Subject Enrollment

Subject consent signed before scheduling billable procedures.

Interface adds subject to study account in Health Link.

Subject Visits can be linked to the study by schedulers.

Example – OnCore Subject Enrollment

Subject not yet consented in OnCore when procedures need to be scheduled in Health Link.

Research staff add existing patient to OnCore Study.

Subject Visits can be linked to the study by schedulers.

Interface Workflow – Subject Status Changes

- As subject statuses change in OnCore, Health Link is updated instantly.
- Some statuses will inactivate subjects for study participation (consent refused, ineligible, etc.).
  - See handout for complete list.

Interface Workflow – Additional Subject Status Considerations

- Statuses are hierarchal – the subject’s current OnCore status will be displayed in Health Link.
- Special Patient Billing can be notified when manual changes are required:
  - Manual deactivations (LTFU, manual additions, etc.)
  - Include patient name, MRN, IRB No., and new status.

Interface Workflow – Study Completion and Closure

- When study status is updated to IRB Study Closure/Terminated in OnCore, the Health Link record is closed.
- All subject charges should be reconciled prior to terminating the study.

Example – Complete OnCore Subject Workflow

- Subject consent entered in OnCore.
- Interface adds patient to study in Health Link.
- Interface updates patient status in Health Link.
- Research staff adds existing patient from Health Link to OnCore using the Find button.
- Subject goes On Study, On Treatment, etc.
- Research staff adds patient back to study in Health Link.
- Subject refuses consent, withdraws, expires, completes study, etc.
- Interface inactivates patient on study in Health Link.
Implementation

• The Patient Demographics Interface will start on 05/08/2013
• The Subject Study Status interface will start on 05/14/2013
  – Includes existing studies with billable procedures (and their subjects)

Questions?
**OnCore and Health Link Interface Handout**

**Contact Information**

OCT - octfinance@clinicaltrials.wisc.edu  
Patient Registration - 608-261-1600  
UWHC Special Billing Office (for UWHC billing questions) 608-263-3092, CFrederickson@uwhealth.org  
UWMF Special Billing (for UWMF professional fees and subject registration questions) 608-829-5341, specialbillingservices@uwmf.wisc.edu  
Nancy Lutz – 608-262-7711, nlutz@uwhealth.org

Note: A UWHC MRN must be obtained prior to entering a new subject in OnCore. This will ensure they are appropriately linked to the study in Health Link and prevent a mismatch of information, posing a patient safety risk.

**Interfaced Fields**

Health Link regularly overwrites OnCore’s subject demographic data with its own records. If the information Health Link is sending is incorrect, corrections must be made in Health Link.

Corrections to Health Link demographics can be made by notifying Patient Registration via email using the Demographics Data Correction Form or the Deceased Patient Form.

- UWHC MRN
- Last Name
- First Name
- Middle Name
- Suffix
- Date of Birth
- Gender
- Race*
- Ethnicity*
- Address Line 1
- Address Line 2
- City
- State
- ZIP
- Country
- County
- Home Phone Number
- Alternate Phone Number (populated by Health Link’s Work Phone Number)
- Expired Date

* Field information populates initially when using the Find button, but any future updates in Health Link to these fields will not transfer to OnCore

**Subject OnCore Status and Corresponding Health Link Status**

Listed below are subject statuses that will be sent to Health Link. Other statuses (such as On Treatment) will not change the subject’s status in Health Link.

Note: The Interface respects OnCore’s hierarchy of statuses, so if a step is skipped, and later filled in, the subject will retain the latest status per OnCore’s workflow. For example, if a subject is put On Study, and subsequently the study staff document consent, the subject will still appear in Health Link as On Study.

<table>
<thead>
<tr>
<th>OnCore Subject Study Status</th>
<th>Health Link Patient Study Status</th>
<th>Active</th>
</tr>
</thead>
</table>
| *Email Special Patient Billing (PB) or click manual link in OnCore (ICTR OnCore Only) if subject needs to be scheduled for study procedures in Health Link before consent is obtained (no OnCore status)  
*If < 24hr notice, please call Special PB | *Pre-Screening  
(patient is attached to the study and status manually entered by billing staff) | Consented |
| Consented                                   | Consented                        | Eligible |
| Eligible                                    | Eligible                         | On Study |
| On Study                                    | On Study                         | On Study / Off Treatment |
| Off Treatment                               | On Study / Off Treatment         | On Follow-up |
| On Follow-up                                | On Follow-up                     |        |
Email billing staff if subject will remain “On Study” in OnCore, but not have any billable procedures for the remainder of the study (no OnCore status)

<table>
<thead>
<tr>
<th>Consent Refused</th>
<th>Declined</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Eligible</td>
<td>Not Eligible</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Withdrawn</td>
</tr>
<tr>
<td>Off Study</td>
<td>Off Study</td>
</tr>
</tbody>
</table>

On Long-term Surveillance (no study billing) (status manually changed by billing staff)  

Inactive

* If a subject is manually attached to a study (via the Manual Subject Registration Notice or by calling/emailing special billing), but refuses participation, screen fails, or ceases study involvement for any reason, it is essential that the subject’s status is updated in Health Link. This may require contacting Special Patient Billing staff if the subject was never entered into OnCore.