Patient Care Corrections
(From Subject/Insurance to the Research Fund)

SUBMITTING A PATIENT CARE CORRECTION REQUEST TO INSIGHT

In Insight, enter the Agreements module and select the fund you will be moving the charges onto.

1. Under **Financials** > **Expense Management** in the left-hand navigation pane, click "Patient Care Charges".

This brings you to the fund's patient care charge detail page.

> **NOTE:** If you do not find "Patient Care Corrections" listed (or do not have access to "Agreements" at all), you may either request this access with the PI's approval, or identify someone on the study team who does have access who can submit the PCC request.

2. Click the "Request Patient Care Correct" button.

3. This brings you to the Patient Care Corrections submission form. Choose the type of charge(s) to be corrected: technical (also called "hospital") charges or professional charges.

> **NOTE:** Requests for technical and professional charge corrections must be submitted separately.

4. Populate the highlighted fields in #4 above for each line item to be corrected. All fields are required **EXCEPT**:

   A. Underline the charge code or the CPT code is required. Once you've populated one of those codes, the other field may be left blank.

   B. The "Discount Amount" and "Amount to Fund" fields may be left blank.

   > **NOTE:** You may submit multiple line items in a single submission, including multiple subjects and dates of service, as long as the corrections are all to **the same fund**, involve the **same type of charge** (tech or pro), and require the **same correction type** ("Transfer Insurance/Self Pay to Research Fund"). To add additional lines to your request, click the blue "+ Add Record" link below the row.

5. Select the correction type ("Transfer Insurance/Self Pay to Research Fund").

6. In the "Charges belong on Study Code number" box, enter the full Epic study code (e.g., 2017P001234-123456).

7. In the "Remove charges from Study Code number" box, type "N/A".

8. Include all relevant information in the "Explanation for correction" box, including:

   A. What happened/description of the error.

   B. What needs to be done.

   C. Study code the charges should be directed to.

   > **Example:** "Charges for research-related services billed to subject/insurance in error. Please reverse charges from subject/insurance and direct to study code 2017P001234-123456."

9. Click "Submit" at the bottom right-hand corner of the submission form.

   > **NOTE:** If you need to stop before the correction request is complete, you may click the "Save" button instead. Your progress will be saved in draft form until you return.

REVIEWING PREVIOUSLY SUBMITTED OR SAVED PATIENT CARE CORRECTION REQUESTS

To view the status of a previously submitted correction, view notes or review the details of a submission, or return to the draft of an incomplete request, enter the Insight Agreements module. You do not need to click into a specific fund.

1. Scroll down to "Actions" in the left-hand navigation pane. Click the "⊕" symbol (if necessary) to expand the section. Click "Patient Care Corrections".

2. Populate the request status(es) of the correction(s) you wish to locate. You must include at least one status. You may include as many as all listed status options in a single search.

    NOTE: You can narrow your search further by populating some or all fields above the "Request Status" row.

3. Click "Search". All corrections submitted for funds that you have access to, which also fit the search criteria you've defined, will populate.

4. Click the 4-digit "Request ID" number for the submission you wish to open/review.