

# Patient Care Corrections

## (Transfer Research Fund to Subject/Insurance)

### 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.

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

Category / Account	Budget	Expense	Current GL Balance	Encumbrance	Projected Balance
SALARIES & WAGES	\$1,000,000.00	\$2,000,000.00	(\$1,000,000.00)	\$0.00	(\$1,000,000.00)
FRINGE BENEFITS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PATIENT CARE	\$0.00	\$15,150.00	(\$15,150.00)	\$0.00	(\$15,150.00)
OTHER EXPENSES	\$0.00	\$500,000.00	(\$500,000.00)	\$0.00	(\$500,000.00)
<b>Total Direct Costs</b>	<b>\$1,000,000.00</b>	<b>\$2,515,150.00</b>	<b>(\$1,515,000.00)</b>	<b>\$0.00</b>	<b>(\$1,515,000.00)</b>
<b>Total Costs</b>	<b>\$1,000,000.00</b>	<b>\$2,515,150.00</b>	<b>(\$1,515,000.00)</b>	<b>\$0.00</b>	<b>(\$1,515,000.00)</b>
TOTAL REVENUE		\$5,000,000.00		\$0.00	
Prior Year Balance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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.

- Put a check in the box(es) to the right of the charge(s) you are requesting the correction(s) for.
- Click the “Request Patient Care Correct” button.

Service Inst	CPT Code	Charge Desc	QTY	Patient Name	MRN	Type	Service Date	Post Date	Amt to Fund	PCC Req
BWH	88321	Tissue Rege...	1	Wilson,Wade	12345678	Tech	01/31/18	02/01/18	\$15,150.00	<input checked="" type="checkbox"/>
BWH	88321	Tissue Rege...	1	Wilson,Wade	12345678	Pro	01/31/18	02/01/18	\$150.00	<input type="checkbox"/>
<b>Patient Care Detail Totals between 10/1/2006 and 12/31/2099</b>									<b>\$15,150.00</b>	
<b>Other Patient Care Activity between 10/1/2006 and 12/31/2099</b>									<b>\$0.00</b>	
<b>Grand Totals</b>									<b>\$15,150.00</b>	

- 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.

The charge information should already be populated in the row(s) below the blue column header, pulled from the charge(s) you checked in step #2.

- Select the correction type (either “Transfer Research Fund to Insurance/Self Pay – Study-related” or “Transfer Research Fund to Insurance/Self Pay – Not study-related”, whichever is appropriate).
- In the “Charges belong on Study Code number” box, type “N/A”.
- In the “Remove charges from Study Code number” box, enter the full Epic study code (e.g., 2017P001234-123456).
- Include all relevant information in the “Explanation for correction” box, including:
  - What happened/description of the error.
  - What needs to be done.
  - Study code the charges should be directed to.

**Example:** “Charges for insurance-billable services billed to study fund in error. Please reverse charges from study code 2017P001234-123456 and direct to subject/insurance.”

- 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.

**AGREEMENTS**

**Patient Care Corrections**

Submitted by:  Fund #:  Request ID:

From Last Updated:  To Last Updated:  Budget End Date From:  Budget End Date:

Request Status:  Draft  Pending  Denied  Completed  Closed

Req ID	Submit Date	Submitted By	Fund #	Correction Type	Assigned To	Type	Last Update By	Last Update	Hosp	Status
<a href="#">9999</a>	03/22/18	Freeman, Francis	123456	Transfer Insurance/Self Pay to Research Fund	Nicieza, Fabian	Tech	Miller, Tim	03/22/18	BWH	<span>○</span> <span>○</span> <span>○</span> <span>○</span>
<a href="#">9998</a>	03/22/18	Freeman, Francis	123456	Transfer Insurance/Self Pay to Research Fund	Liefeld, Rob	Pro	Miller, Tim	03/22/18	BWH	<span>○</span> <span>○</span> <span>○</span> <span>○</span>
<a href="#">9997</a>	03/22/18	Freeman, Francis	123456	Correct Patient and Fund but Incorrect Charge	Liefeld, Rob	Pro	Miller, Tim	03/22/18	BWH	<span>●</span> <span>○</span> <span>○</span> <span>○</span>

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.