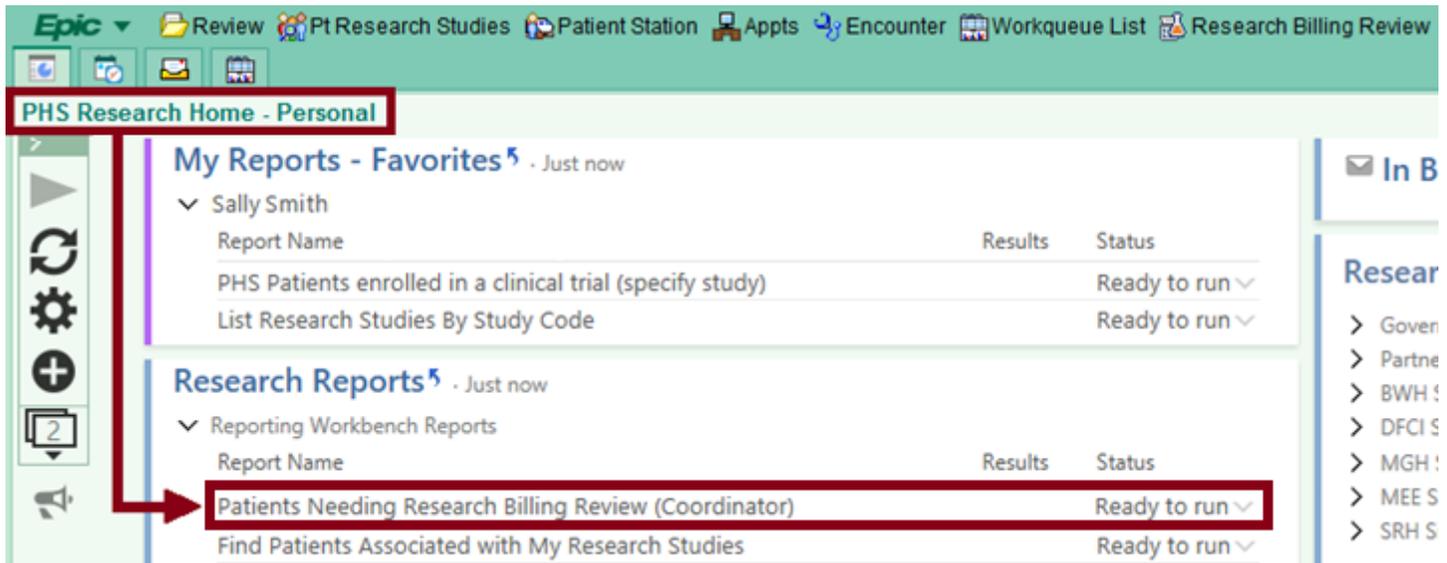


Epic Research Billing Review FAQ

What is the Research Billing Review?

The Research Billing Review (RBR) is a report located on the “PHS Research Home” Epic dashboard that allows members of a study team to view and direct (or redirect) research-related charges to the subject/insurance or to the study fund, whichever is appropriate. The full title of this report, as seen on the dashboard, is “Patients Needing Research Billing Review (Coordinator)”.



Who can run the Research Billing Review?

The Research Billing Review can be run by any member of the study team who has access to the study in Epic. This includes PIs and co-investigators, research coordinators, research assistants, research nurses, and any other members of the study team who have Epic access to the study.

To gain access to a study in Epic, a team member must be listed on the protocol in Insight and have completed their Epic Research Team training. Once those two requirements have been met, access to the study record in Epic is granted.

Do I have to run the Research Billing Review?

Every active PHS clinical trial must have a member or members of the study team assigned to run the Research Billing Review regularly to validate or redirect all research-related charges. Commonly, this is performed by research coordinators or research assistants, but it may be done by anyone with access to the study in Epic who has sufficient knowledge of the research being conducted and how its related charges must be directed (as dictated by the agreement with the sponsor and—most importantly—the Informed Consent Form).

How do I run the Research Billing Review?

To run the Research Billing Review, double-click on the report in the dashboard and it will run automatically to pull research-related charges for all studies you have access to in Epic. If you are listed on multiple studies, but prefer to see charges only for some, you can alter the settings by clicking on the small downward arrow next to “Ready to Run” and selecting “Edit”. A settings box will open where you can choose only the study or studies you want to capture.

Once the report has run, double click on each subject’s entry to access the account(s) awaiting research billing review.

Epic | Review | Pt Research Studies | Patient Station | Appts | Encounter | Workqueue List | Research Billing Review | Patient Inquiry

Reports

Patients Needing Research Billing Review (Coordinator) [87654321] as of Fri 1/1/2017 8:30 PM

Filters | Options | Billing Review | Patient Station | Research Studies

Patient	MRN	Research Study Code	Research Study Nm	Last Rvw Dt	Last Review User	Outst Bal
Finch, Atticus	12345678	2017P001234-123456	A doubleblind randomized placeboco...	01/01/2017	SMITH, SALLY	547.00
Montoya, Inigo	23456789	2017P001234-123456	A doubleblind randomized placeboco...	01/01/2017	SMITH, SALLY	35.00
Wilson, Wade	34567890	2017P012345-112233	A PHASE III MULTICENTER STUDY...	01/01/2017	SMITH, SALLY	381.00

What charges should I expect to find in the Research Billing Review?

When a subject is enrolled to a clinical trial in Epic, all research-related encounters (orders, appointments, procedures, etc.) must be linked to the study in the system. Once this linking has occurred, any charges generated in conjunction with the encounter will be directed to the Research Billing Review for study staff validation/redirection prior to being released to bill the subject/insurance or the study code.

What is meant by “in conjunction with the (research) encounter” depends whether the subject was inpatient or outpatient at the time the research-linked activity occurred. If the research-linked activity occurred in the **outpatient** setting, all charges generated during **the same date of service** will appear in the Research Billing Review and require attention from the study team, regardless of whether each charge is related to the research or not. If the research-linked activity occurred while the subject was **inpatient**, all charges generated during **the entire inpatient stay** (from admission to discharge) will appear in the Research Billing Review and require attention from the study team.

Study staff should expect to find both hospital charges (also called “technical” charges) and professional charges in the review. A hospital charge is a charge for the item itself (e.g., an x-ray). The professional charge is for the professional who provides a related service (e.g., the radiologist who reads and results the x-ray). You can tell hospital and professional charges apart in the Research Billing Review by the color of the header at the top of each account. Hospital charge accounts fall below a mustard-yellow header, while professional fees’ headers are blue (see below).

Research Billing Review for Wilson,Wade [34567890] ? Resize Close

Refresh Restrictions

A PHASE III MULTICENTER STUDY TO ASSESS THE EFFICACY OF MUTAGENIC SERUM

Study code: 2017P012345-112233 Start date: 2017P012345
 Coordinators: Fanny, Francis IRB:

12/31/16 Outpatient, BWH Parent Study-Related **Hosp Acct 6780000000** CLOSED

Charges Mark Account as Reviewed

Research Correction

Study-Related - Bill to Study

Rvw	Svc Date	Post Date	Code	Description	Qty	Amount
<input type="checkbox"/>	12/31/16	01/01/17	32000154	HC RADIOLOGIC EXAMINATION KNEE 1/2 VIEWS	1	346.00

12/31/16 BWH IMG XRAY FXB Study-Related **Guar Acct 2233445 - WILSON,WADE** Fanny, Francis

Charges Mark Service Date as Reviewed

Research Correction

Study-Related - Bill to Study

Select All Deselect All

Rvw	Svc Date	Post Date	Code	Description	Qty	Amount
<input type="checkbox"/>	12/31/16	01/01/17	73560 (CPT®)	CHG X-RAY KNEE 1 OR 2 VIEW	1	35.00

Not all charges include both hospital and professional components. Some may have only one or the other. Additionally, a single hospital charge may be associated with multiple professional charges and vice versa.

There are charges in my Research Billing Review that have nothing to do with my research. How do I know they won't be billed to my study fund?

Billing for services associated with clinical trials is complex. The Research Billing Review puts the power to determine how these charges should be directed in the hands of the people who understand the research best: The study team. As mentioned previously, the report captures all charges generated during the same date of service (outpatient) or admission (inpatient) as the research-linked activity. This is to protect the subject from being erroneously billed for something that may have been missed during the linking process.

For this reason, and because research frequently occurs in conjunction with usual care, it is both common and expected to find usual care charges in the Research Billing Review. The study team has three options for directing each charge while performing the review: "Study-Related – Bill to Study"; "Study-Related – Bill to Insurance"; and "Not Study-Related". Only charges tagged as "Study-Related – Bill to Study" when the account is marked as reviewed will be billed to the study fund.

How often do I need to perform the Research Billing Review?

If you are expecting charges to hit the Research Billing Review, the report must be run and charges reviewed **at least twice a week**.

If you are not expecting any charges to hit the Research Billing Review (i.e., no recent research-associated activity has occurred), someone from the study team must run the report **at least once a week** to verify that no unexpected charges are caught there. There are several reasons why this might occur, including charges dropping after the most recent review or encounters being linked to a study in error.

Who can I contact if I have questions or need help with the Research Billing Review?

Contact Margaret Lyons in BWH Research Billing Compliance with any questions or requests for assistance: MLYONS@BWH.HARVARD.EDU or 617-582-5230.