

Patient Care Corrections (Transfer between Research Funds)

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) |
| Total Direct Costs | \$1,000,000.00 | \$2,515,150.00 | (\$1,515,000.00) | \$0.00 | (\$1,515,000.00) |
| Total Costs | \$1,000,000.00 | \$2,515,150.00 | (\$1,515,000.00) | \$0.00 | (\$1,515,000.00) |
| 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 | \$15,000.00 | <input checked="" type="checkbox"/> |
| BWH | 88321 | Tissue Rege... | 1 | Wilson,Wade | 12345678 | Pro | 01/31/18 | 02/01/18 | \$150.00 | <input type="checkbox"/> |
| Patient Care Detail Totals between 10/1/2006 and 12/31/2099 | | | | | | | | | \$15,150.00 | |
| Other Patient Care Activity between 10/1/2006 and 12/31/2099 | | | | | | | | | \$0.00 | |
| Grand Totals | | | | | | | | | \$15,150.00 | |

- 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 (“Transfer within Research Funds”).
- In the “Charges belong on Study Code number” box, type the full Epic study code for the fund they should be moved onto (e.g., 2017P001234-**198765**).
- In the “Remove charges from Study Code number” box, enter the full Epic study code for the fund they need to be moved off (e.g., 2017P001234-**123456**). This should be the study code for the fund from where you’re submitting the PCC request.
- 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 research-related services billed to incorrect study code. Please reverse charges from study code 2017P001234-123456 and direct them to study code 2017P001234-198765.”

- 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.

***If you the charges you are requesting to have moved between funds are more than 90 days old, a new set of boxes will appear as you attempt to submit the form, requesting additional information about this late cost transfer between funds. Answer each new question as thoroughly as you are able, and then click “Submit”.**

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

Search

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

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.