

Research Billing Review

The PI/Financial Delegate is responsible for reviewing all research related charges and completing the Research Billing Review.

CED coordinators: we are leveraging the research functionality to accommodate CED billing compliance. You will see screens relating to or directly referencing research studies and research scenarios. You can essentially replace anywhere you see the word “research study” with CED procedure. The setup and workflow will be identical to the current non-oncology research billing workflow.

About Research Billing Review

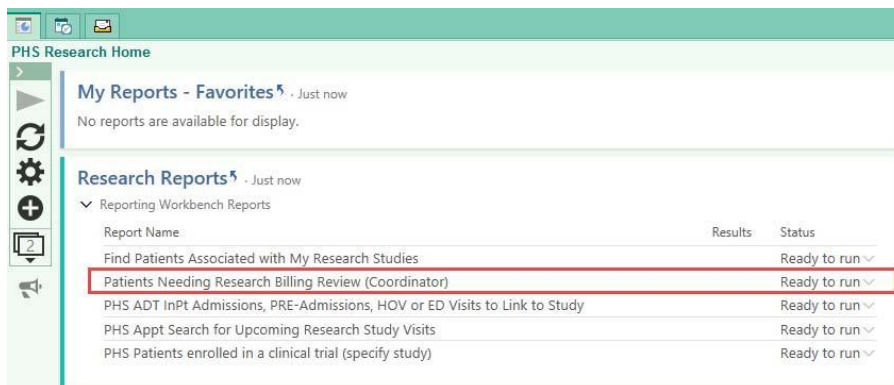
- Research Billing Review is a prospective process to review charges and ensure they are being billed to the correct responsible party.
- The billing for services linked to research studies remains suspended until the PI/Designee has completed the Research Billing Review.

Process

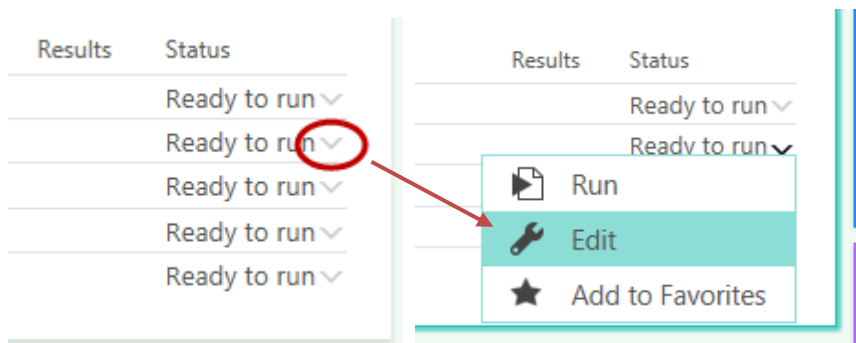
1. Only need to do this once per study, save the billing report as your own. ([Pg. 1](#))
2. Second Step: Run report and conduct billing review via research billing review activity. ([Pg. 4](#))

Save the billing report as your own

1. Navigate to your Reporting Dashboard
2. Choose either the biller or coordinator report, based on your role.



3. Click on the down arrow next to the “Ready to Run” text and select the “Edit” option.



4. Check the research studies box on the criteria tab and enter the studies you are conducting billing for in the “Research Study” field.

Patients Needing Research Billing Review (Coordinator) [86008]

Criteria Display Appearance Summary Print Layout Toolbar Override General

Find Patients Needing Research Billing Review

Filter criteria Enter Search Values Info

Research Study

Enrollment Status

Review is Current for Coordinator?

Review is Current for Biller?

Billing System

Study Selection Rule

	Research Study
1	Vitamin D, Mobility, Bal
2	

5. After entering the studies, click the “Save As” button.

Enrollment Status:
Completed OR
Consented OR

Notify

6. Rename your report
- Use your initials at the end of the report
 - Click Accept.

Patients Needing Research Billing Review (Coordinator) [86008]

Criteria Display Appearance Summary Print Layout Toolbar Override General

Find Patients Needing Research Billing Review

Filter criteria + Add Enter Search Values Info

Research Study

Enrollment Status

Review is Current for Coordinator?

Review is Current for Biller?

Billing System

Study Selection Rule

Service Area

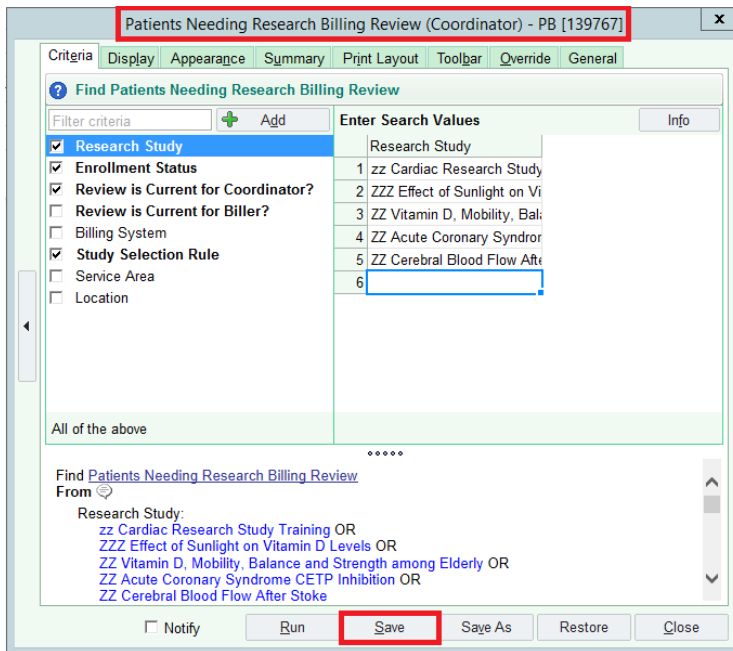
Location

	Research Study
1	zz Cardiac Research Study Training
2	ZZZ Effect of Sunlight on Vitamin D Levels
3	ZZ Vitamin D, Mobility, Balance and Strength
4	ZZ Acute Coronary Syndrome CETP Inhibito
5	ZZ Cerebral Blood Flow After Stoke

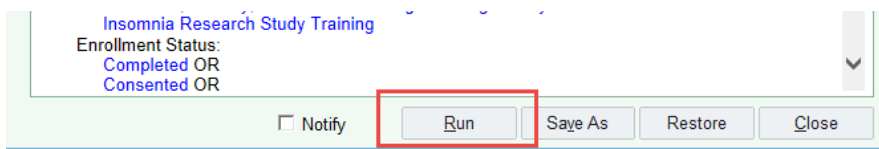
Patients Needing Research Billing Review (Coordinator) [86008]

Enter the name of the new report: g Review (Coordinator) - PB

7. Click Save, notice how the name of the report as updated.



8. Click Run.

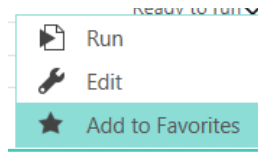


The report will run and open a new tab.

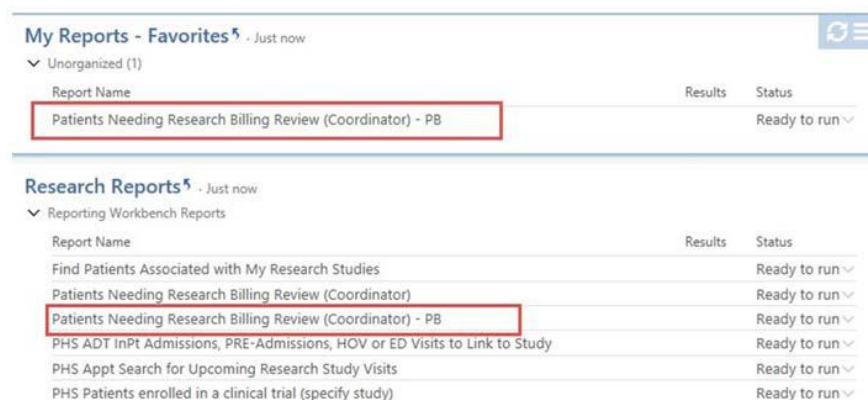
9. Go back to your dashboard.

Add the report as your favorite

10. Click the down arrow next to your custom report and select the “Add to Favorites” button.



The report will show in the “Research Reports” and in the “My Reports – Favorites” sections of the Reporting Dashboard.



Conduct Billing Review

1. Run the billing report, if you haven't already.
2. Double click the patient you want to conduct billing review for.

Charges

Research Correction

Study-Related - Bill to Study

Rvw	Svc Date	Post Date	Code	Description
<input type="checkbox"/>	01/05/15		35000034	HC CT CERVICAL SPINE W/O CONTRAST MATERIAL

Non-Study Charges

Select All Deselect All

Rvw	Svc Date	Post Date	Code	Description
<input checked="" type="checkbox"/>	01/05/15	01/05/15	30000173	HC LIPID PANEL
<input type="checkbox"/>	01/05/15	01/05/15	30001038	HC BLOOD COUNT COMPLETE AUTOMATED

3. There are 3 different possible "buckets" where the patient charges pre-populate. You may see one, or more, depending on the type of linking (order or visit) or the existence of a billing calendar (created from the Medicare Coverage Analysis).

- a) Study-Related – Bill to Study
- b) Study Related- Bill to Insurance/Patient
- c) Non-Study Charge

01/13/14 Outpatient, NVH Parent Hosp Acct 1000014412
 Visit 1 Screening ZZ ACUTE CORONARY SYNDROME CETP INHIBITION (Ver. 1) DNE (DNE Error)

Charges

Research Correction

Study-Related - Bill to Study

Rvw	Svc Date	Post Date	Code	Description	Qty	Amount
<input type="checkbox"/>	01/13/14	01/13/14	30000743	HC GONADOTROPIN CHORIONIC QUALITATIVE	1	66.00

Study-Related - Bill to Insurance/Patient

Rvw	Svc Date	Post Date	Code	Description	Modifier Type	Qty	Amount
<input checked="" type="checkbox"/>	01/13/14	01/13/14	30000008	HC ELECTROLYTE PANEL	Routine	1	61.00
<input type="checkbox"/>	01/13/14	01/13/14	30000010	HC HEPATIC FUNCTION PANEL	Routine	1	93.00
<input type="checkbox"/>	01/13/14	01/13/14	30000175	HC RENAL FUNCTION PANEL	Routine	1	113.00

Non-Study Charges Grouped By Revenue Code

Deselect All Groupers

Rev Code	Description	Qty	Total
<input checked="" type="checkbox"/> 0301	LABORATORY - CHEMISTRY	1	150.00
<input checked="" type="checkbox"/> 0482	CARDIOLOGY - STRESS TEST	1	963.00

Charge group: Revenue Code

Rvw	Svc Date	Post Date	Code	Description	Qty	Amount
<input type="checkbox"/>	01/13/14	01/13/14	30000309	HC ASSAY OF AMYLASE	1	150.00
<input type="checkbox"/>	01/13/14	01/13/14	48000173	HC CV STRS TST XERS&IOR RX CONT ECG TRCG ONLY	1	963.00

Please see notes about Modifiers on next page*

4. If any charges need to be corrected, click the check box next to the charge. Then click Research Correction.

5. Research Charge Correction will display. If this charge is study related and billed to study, you can indicate that:

The screenshot shows a dialog box with the following fields and options:

- Research-related**
- Study:
- Show only active enrolled studies
- Protocol:
- Treatment day:
- Modifier type:
- Bill to: Patient/Insurance **Study**
- Not research-related**
- Buttons:

NOTE: if the charge is research related but bill to patient/insurance, you must indicate a Modifier in the Modifier Type field.

- **Investigational/Device:** Select Investigational/Device if the charge is for the investigational drug or investigational device itself.

- **Routine:** Select routine if the charge is for a service related to the research protocol (not investigational device or drug) and will be covered by insurance.

The screenshot shows the same dialog box as above, but with the following changes:

- Bill to: **Patient/Insurance** Study
- Buttons:

6. Once you have properly corrected this charge, click accept.

7. Once all charges are reviewed and correct, select Mark Account as Reviewed. The charges will be sent.

8. Click refresh in the top left to see the updates. This allows the user to verify that all charges are in the correct bucket before releasing for billing.

Research Billing Review for Arugula,Joseph [80001138] ? Resize Close

Restrictions

Showing visits that were not previously reviewed, are related to the study, and are configured as needing review.

Vitamin D, Mobility, Balance and Strength among Elderly

Study code: 2013Z002724-220508 Start date:
 Status: Enrolled End date:
 NCT: IRB:
 Coordinators:

01/05/15 Outpatient, MGH Parent Hosp Acct 8866
 Study-Related DNB

Charges

Study-Related - Bill to Study

Rvw Svc Date	Post Date	Code	Description	Qty	Amount
<input type="checkbox"/> 01/05/15		35000034	HC CT CERVICAL SPINE W/O CONTRAST MATERIAL	1	2,294.00

.. Non-Study Charges

Note: Once you select Mark Account as Reviewed in the Research Billing Review charges will be sent to the appropriate payer. If changes need to be changed after you select Mark Account as Reviewed is selected, you must do a Patient Care Correction in Insight.