



Procedure Name: Epic Research Billing Review	Number: SOP 25 v1.0
Subject: Clinical Research	Effective Date: February 07, 2024
Linked Policy: Clinical Research Operations & Compliance Policy	Revised Date: February 07, 2024

PURPOSE:

This Standard Operating Procedure (SOP) outlines the steps and frequency required for billing review of counters and charges in Epic for research studies. This allows for the review and routing of charges to be invoiced to the sponsor or patient/insurance.

SCOPE:

This SOP applies to Research Coordinators, research teams, and designated staff members responsible for billing review.

RESPONSIBILITY:

Research Coordinators are to complete first-tier billing review in Epic **no more than three (3) days** after closing an encounter. The OCR will provide second-tier review **weekly** for all studies in the queue.

PROCEDURES:

General Practice Procedures

1st Tier review (Research Coordinator)

1. Research Coordinator will complete and sign off on encounter associated with research visit.
2. Research Coordinator should review and verify billing charges.
 - a. Direct the charge to patient/insurance or study.

**See Appendix A for step-by-step instructions.

2nd Tier review (Business Operations designee with OCR)

1. Reviewers go into the Research Biller Review dashboard.
 - a. Research Biller Review Dashboard will have two reports, one for the Study Team Review and one for the OCR staff (labeled "Biller Review").
2. Run the applicable report by selecting the icon with the magnifying glass in the upper righthand corner of the applicable square.



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- a. The Study Team report will show patients awaiting review by both the Coordinator and the OCR staff member.
 - b. The Biller Report (for OCR staff) will show those that have been reviewed by the Coordinator with their name and the date it was reviewed.
3. In the report, select by double-clicking OR single click to highlight & click the Billing Review button in the top left-hand corner on the patient line you are to review. This will open a new tab with each charge for that patient.
 4. The charges will be grouped into three categories (Study-Related - Bill to Study; StudyRelated - Bill to Insurance/Patient; Non-Study). Each charge should be reviewed for accuracy.
 - a. If correct, select the checkbox next to the charge and click "Mark as Reviewed".
 - b. If incorrect, right-click anywhere on the charge's row and click "Research Correct" from the dropdown. In the pop-up the "Research Related" assignment, "Modifier Type" and/or the "Bill To" designations may be changed. Select "Accept" at the bottom of the pop-up box once corrected. The charge can then be selected and the "Mark as Reviewed" button clicked.
 5. Steps 3 and 4 should be repeated for all patients and charges requiring review.

Review and Revision

The SOP Review Committee shall review this SOP every 2 years. This SOP may be reviewed more frequently if it does not reflect current operations.

Attachments

Research Coordinator – Reporting on and Completing Outstanding Research Billing Review

REFERENCES:

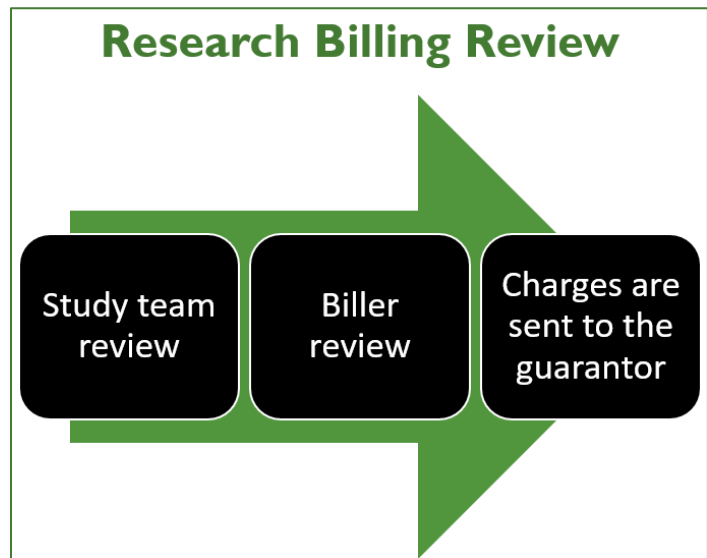
Research Coordinator - Reporting On and Completing Outstanding Research Billing Review

Overview of Research Billing Review

Research billing review allows a double check of charges before they are billed to either the study or patient/insurance.

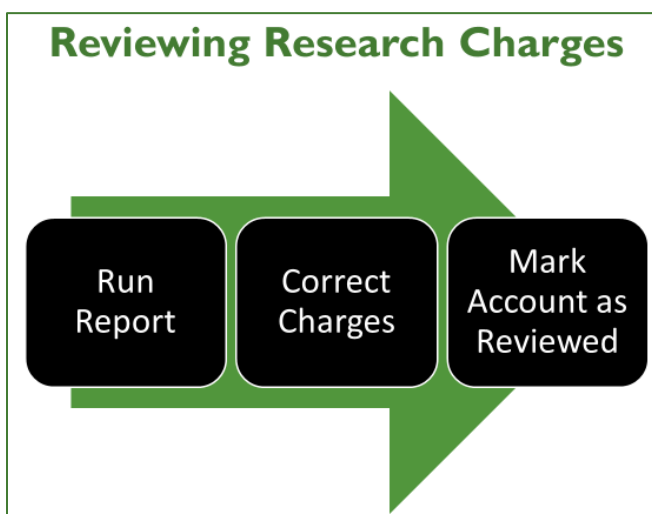
A member of the **study team** will perform the first check. For the purpose of billing review, anyone performing the second check is called a **biller**.

Charges must be reviewed by both a study team member and biller before they are sent to guarantors.





Big Picture:

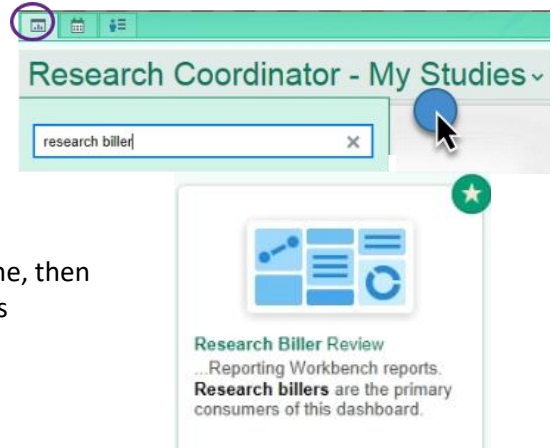
First, the biller or study team member will run a report to identify patients needing study team review (first check) or biller review (second check). Then they will follow the same workflow to make corrections and mark the account as reviewed.



Add the Research Biller Review Dashboard to Your Favorites

If **Research Biller Review** is not your default dashboard, you can search and add it as a favorite.


- From your **Dashboard** , click the dashboard name at the upper left and search for “research biller.”
- Hover and click the star  to add Research Biller Review as a favorite dashboard.
- Moving forward, you can access by clicking the dashboard name, then selecting Research Biller Review from your favorite dashboards




Run a Report to Identify Patients Needing Billing Review

The **Research Biller Review** dashboard has two reports used to find patients needing billing review.

Biller Review	The Patients Needing Research Billing Review (Biller) report shows patients with charges awaiting the second charge review by a biller.
Study Team Review	The Patients Needing Research Billing Review (Study Team) report shows patients with charges awaiting the first charge review by a study team member.


- First, select the appropriate report for biller or study team, then click  at the upper right to view results.


Research Biller Review

Biller Review 

Report completed: Thu 11/17 01:19 PM


42 Patients
Awaiting Biller Review

 **45,822** Outstanding Balance
Awaiting Biller Review

Study Team Review 

Report completed: Thu 11/17 01:19 PM

22 Patients
Awaiting Study Team Review

 **1,890** Outstanding Balance
Awaiting Study Team Review

- The study team report will show patients awaiting billing review by both the study team and biller (review date and user columns are blank).

Patients Needing Research Billing Review (Study Team) [1843566] as of Fri 11/18/2022 3:33 PM

Billing Review Patient Station Research Studies Study Maintenance

Detail List Explore Study Summary

Filter

Re-run Report Refresh Selected Select All

MRN	Patient	Research Study Code	Research Study Nm	Status	Start Date	Outst Balance	Earliest D	Last Study Rvw Dt	Last Study Rvw User	Last Biller Rvw Dt	Last Biller Rvw Us
2005914	Zzrshmaster, Benjamin	96548	TRN Medication	Enrolled	05/31/2021	252.00	06/01/2021				
2005955	Zzrshone, Donald	96548	TRN Medication	Enrolled	06/24/2021	0.00					
2005998	Archimedes, Benjamin	96548	TRN Medication	Enrolled	05/31/2021	84.00	07/01/2021				
2005999	Aristotle, Benjamin	96548	TRN Medication	Enrolled	05/31/2021	42.00	07/01/2021				
2006000	Bell, Benjamin	96548	TRN Medication	Enrolled	05/31/2021	84.00	07/01/2021				
2006001	Bohr, Benjamin	96548	TRN Medication	Enrolled	05/31/2021	84.00	07/01/2021				

- The biller report shows the name of the study team reviewer and the date reviewed.

Patients Needing Research Billing Review (Biller) [1843567] as of Fri 11/18/2022 3:33 PM

Billing Review Patient Station Research Studies Study Maintenance

Detail List Explore Study Summary

Filter

Re-run Report Refresh Selected Select All

MRN	Patient	Research Study Code	Research Study Nm	Status	Start Date	Outst Balance	Earliest D	Last Study Rvw Dt	Last Study Rvw User	Last Biller Rvw Dt	Last Biller Rvw Us
2004794	Zzrshmaster, Thomas	12345	TRN Insomnia	Enrolled	06/10/2021	2,012.00	06/15/2022	07/07/2021	RESEARCH, COORDINATOR		
2006018	Zzrshmaster, Donald	96548	TRN Medication	Enrolled	06/18/2021	170.00	06/25/2022	07/07/2021	RESEARCH, COORDINATOR		
2006019	Archimedes, Donald	96548	TRN Medication	Enrolled	06/18/2021	170.00	06/25/2022	07/07/2021	RESEARCH, COORDINATOR		
2006020	Aristotle, Donald	96548	TRN Medication	Enrolled	06/18/2021	170.00	06/25/2022	07/07/2021	RESEARCH, COORDINATOR		
2006021	Bell, Donald	96548	TRN Medication	Enrolled	06/18/2021	170.00	06/25/2022	07/07/2021	RESEARCH, COORDINATOR		
2006022	Bohr, Donald	96548	TRN Medication	Enrolled	06/18/2021	170.00	06/25/2022	07/07/2021	RESEARCH, COORDINATOR		
2006023	Born, Donald	96548	TRN Medication	Enrolled	06/18/2021	170.00	06/25/2022	07/07/2021	RESEARCH, COORDINATOR		

Outst Balance

- Note the Outstanding Balance column. This value will change to zero once billing review has been completed.

2,012.00

- Click the Filter icon to filter the report by study name.

Filter

Research Study Nm

Research Study Nm

Equals

Search filter values Show All?

TRN Insomnia

TRN Medication

Contains:

From:

To:

Value?

- Select the patient and click the Billing Review button at the upper left to open the patient's Billing Review activity.

Patients Needing Research Billing Review (Biller) [1843564] as of Mon 11/28/2022 2

Billing Review Patient Station Research Studies Study Maintenance

Detail List Explore Study Summary

Filter

MRN	Patient	Research Study Code	Research Study Nm
2004794	Zzrshmaster, Thomas	12345	TRN Insomnia
2006018	Zzrshmaster, Donald	96548	TRN Medication
2006059	Tesla, Thomas	12345	TRN Insomnia

Review Charges and Make Research Corrections

You will be taken to the Billing Review activity. Charges appear here, grouped into three categories:

- Study-Related – Bill to Study
- Study-Related – Bill to Insurance/Patient
- Non-Study Charges

Research Billing Review for Tesla, Thomas [2006059]

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

TRN Insomnia

Office Visit at Primary Care - Foggy Bottom South Pavilion with Whitecoat, Walt, MD

Guarantor Thomas Tesla (6196) Self-Pay

Study User Reviewed Mark as Reviewed

Charges Encounters Review History

Research Correct

Group by: Service Provider CPT#/HCPCS Code Encounter Review Status Bill Area None Other

Study-Related - Bill to Study

Itemized Charges	Bill Rvw	Svc Date	Post Date	Code	Procedure	Study Src	Qty	Amount
<input type="checkbox"/>		06/15/2021	Pending	95807 (CPT®)	PR SLEEP STUDY, ATTENDED, RECORD HR,O2 SAT,RESP FLOW, OR RESP EFF		1	1,335.00

Non-Study Charges

Itemized Charges	Bill Rvw	Svc Date	Post Date	Code	Procedure	Study Src	Qty	Amount
<input type="checkbox"/>		06/15/2021	Pending	99251 (CPT®)	PR INITL INPATIENT CONSULT NEW/ESTAB PT 20 MIN		1	127.00
<input type="checkbox"/>		06/15/2021	Pending	99213 (CPT®)	PR OFFICE/OUTPATIENT ESTABLISHED LOW MDM 20-29 MIN		1	170.00
<input type="checkbox"/>		06/15/2021	Pending	17000 (CPT®)	PR DESTRUC BENIGN/PREMA,FIRST LESION		1	175.00
<input type="checkbox"/>		06/15/2021	Pending	85027 (CPT®)	PR COMPLETE CBC		1	42.00
<input type="checkbox"/>		06/15/2021	Pending	99202 (CPT®)	PR OFFICE/OUTPATIENT NEW SF MDM 15-29 MINUTES		1	163.00

Last reviewed: 7/8/21 1539 by Coordinator Research

You will need to review all the charges that are listed on this screen and make sure that they are correct.

For any charges that need to be corrected:

1. Right-click anywhere on the charge's row and click **Research Correct**.

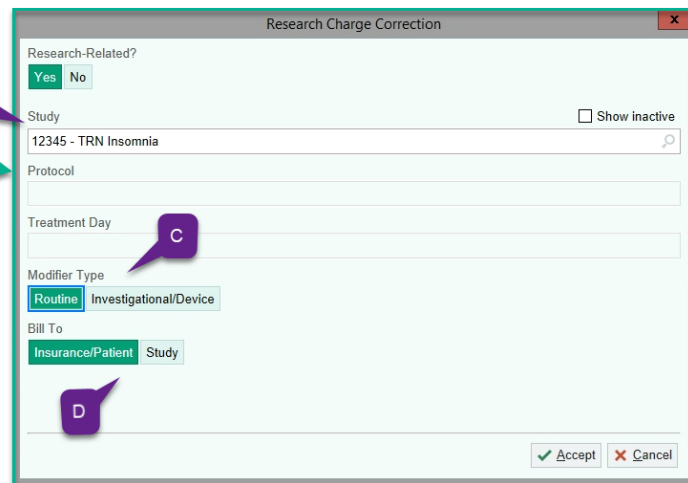
Non-Study Charges

Itemized Charges Select All Deselect All

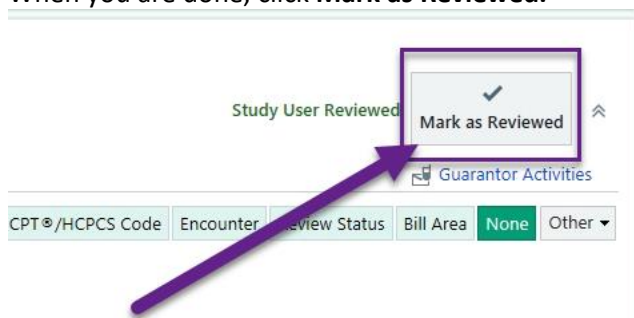
Bill Rvw	Svc Date	Post Date	Code	Procedure
<input type="checkbox"/>	06/15/2021	Pending	99251 (CPT®)	PR INITL INPATIENT CONSULT NEW/ESTAB PT 20 MIN
<input type="checkbox"/>	06/15/2021	Pending	99213 (CPT®)	PR OFFICE/OUTPATIENT ESTABLISHED LOW MDM 20-29 MIN
<input type="checkbox"/>	06/15/2021	Pending	17000 (CPT®)	PR DESTRUC BENIGN/PREMA,FIRST LESION
<input type="checkbox"/>	06/15/2021	Pending	85027 (CPT®)	PR COMPLETE CBC
<input type="checkbox"/>	06/15/2021	Pending	99202 (CPT®)	PR OFFICE/OUTPATIENT NEW SF MDM 15-29 MINUTES

Detail
Charge Router Detail
Charge Review Workqueue
Research Correct

2. If the charge is research related, click **Yes**. Enter the study name or number, select a modifier if applicable, and indicate if it is to be billed to the patient or to the study.



3. When you are done, click **Mark as Reviewed**.



4. Repeat the previous 3 steps on any additional patients that also appear in the report.

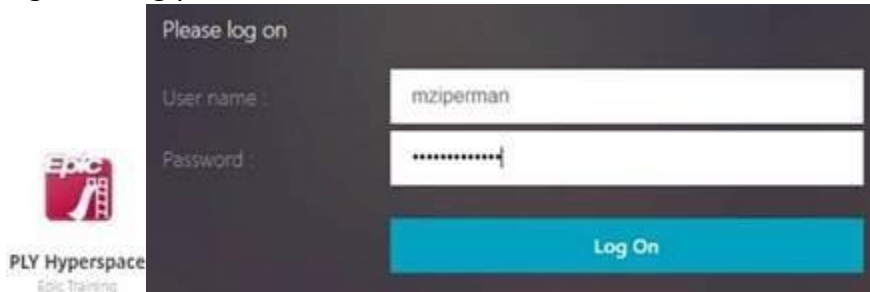
Epic Training Playground (PLY)

You can practice workflows in the **Epic Training Playground (PLY)**, which refreshes every night.

To access PLY:



1. Double click the blue **Epic Other Environments** icon from your VDI desktop.
2. Sign in using your MFA credentials.



3. Double click the PLY Hyperspace icon, then log into Epic using a training login (see below).

Training Logins for the Epic Playground (PLY)

Password for all users is **train** (all lowercase)

User	Login	Last name*	Study	Patient(s)
Amy (Research Coordinator)	rshrc##	Archimedes		
	rshrc00	Aristotle		
	rshrc01	Bell	<Last name>	Leopold
	rshrc02	Bohr	Insomnia Study	Thomas
	rshrc03	Born		Donald
	rshrc04	Curie		
	rshrc05	Darwin		

* Applies to user, patient, and study names.