GW | Office of Clinical Research | School of Medicine & Health Sciences
THE GEORGE WASHINGTON UNIVERSITY

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.

Research Billing Review

Study team review → Biller review → Charges are sent to the guarantor
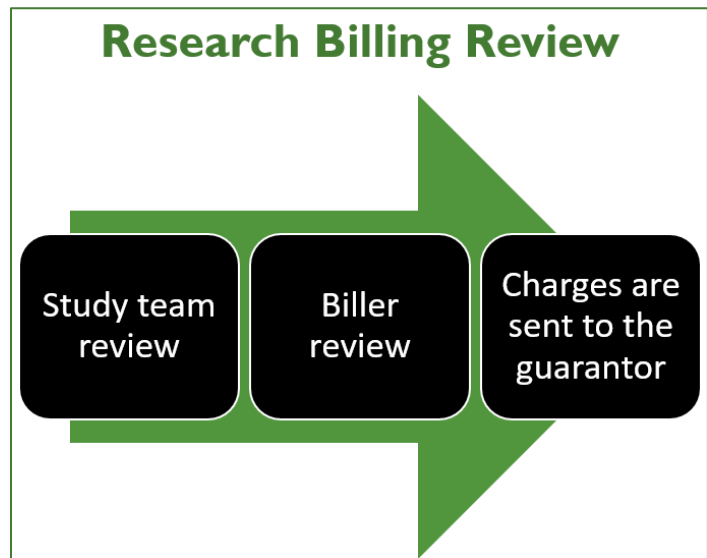
Big Picture:

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.

Reviewing Research Charges

Run Report → Correct Charges → Mark Account as Reviewed
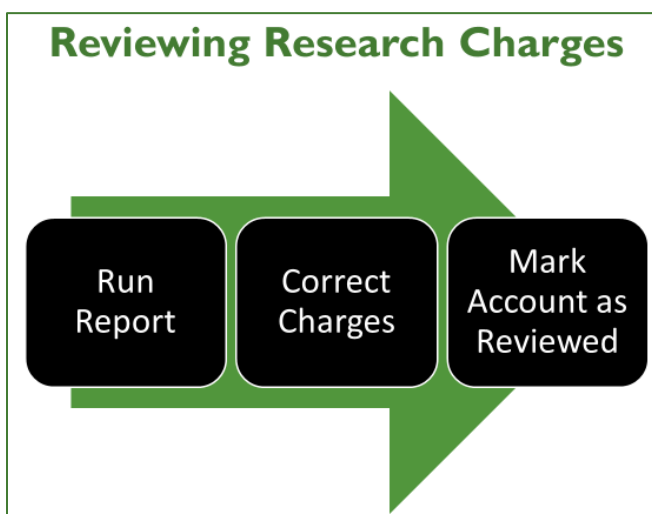
Add the Research Biller Review Dashboard to Your Favorites

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
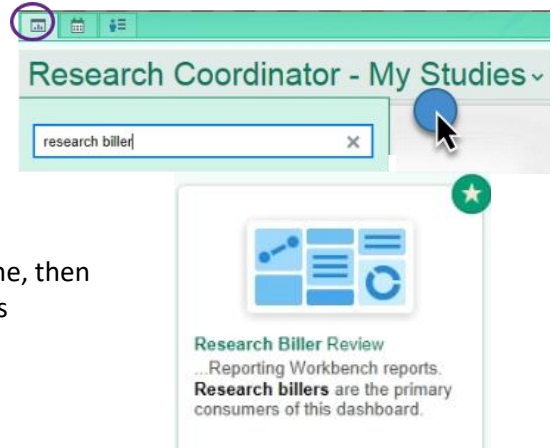
Run a Report to Identify Patients Needing Billing Review

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.

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

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

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

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

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

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

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:

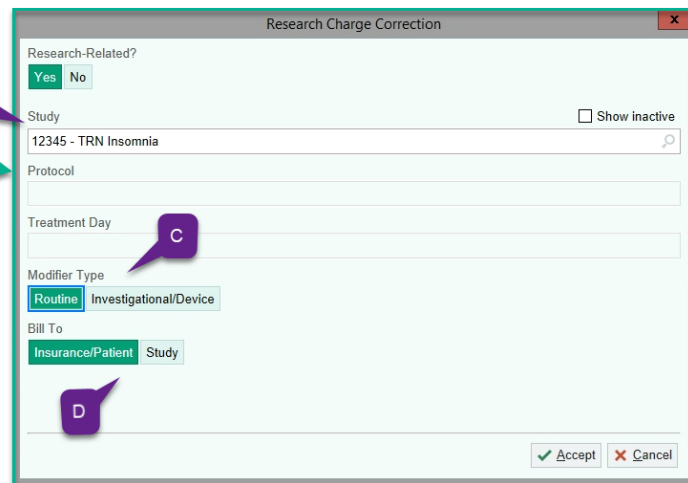1. Right-click anywhere on the charge's row and click **Research Correct**.

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.**
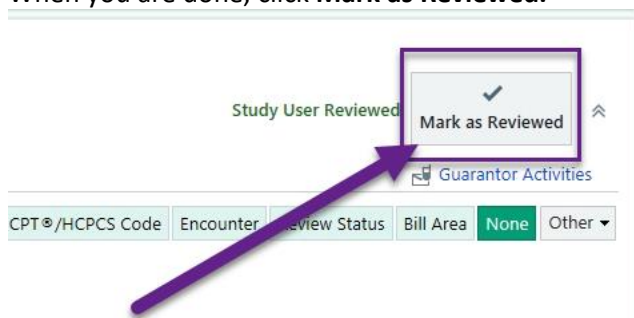
4. Repeat the previous 3 steps on any additional patients that also appear in the report.
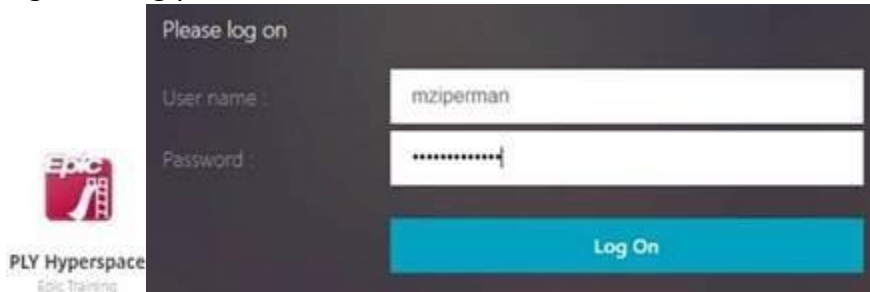
Epic Training Playground (PLY)

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## rshrc00 rshrc01 rshrc02 rshrc03 rshrc04 rshrc05	Archimedes Aristotle Bell Bohr Born Curie Darwin	*<Last name>* Insomnia Study	Leopold Thomas Donald

* Applies to user, patient, and study names.