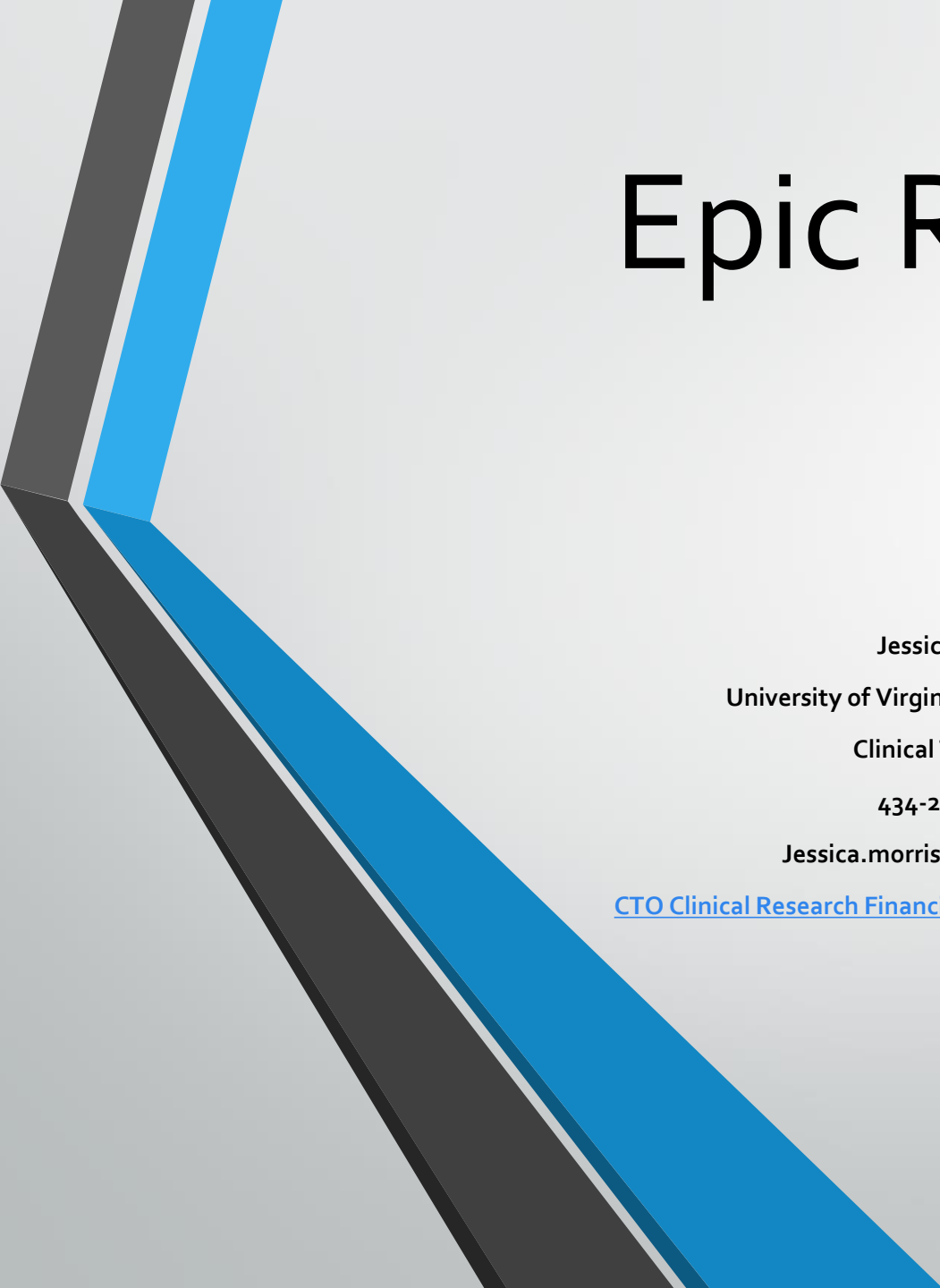




Epic Research Billing Review

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Accreditation

- The University of Virginia School of Medicine and School of Nursing awards **1.0 contact hour** for nurses who participate in this educational activity and complete the post activity evaluation.
- The University of Virginia School of Medicine and School of Nursing awards **1.0 hour of participation** (consistent with the designated number of AMA PRA Category 1 Credit(s)[™] or ANCC contact hours) to a participant who successfully completes this educational activity. The University of Virginia School of Medicine and School of Nursing maintains a record of participation for six (6) years.

Disclosures

Full Disclosure Policy Affecting CME Activities: As a joint accredited provider, the University of Virginia Office of CME/CE requires attested and signed global disclosure of the existence of all financial interests or relationships with commercial interest from any individual in a position to control the content of a CME activity sponsored by OCME.

Disclosure Summary:

No one in a position to control the content of this educational activity has disclosed a relevant financial interest or relationship with any commercial interest

Activity Code

Activity Code: **27049**

Instructions for claiming credits/contact hours can be found [here](#).

Learning Outcomes

- Clinical Trials Unit Tasks
- Study Team Tasks
- Research Pricing for Services & Meds/Agents
- Epic Dashboard Reports
- Research Billing Review
- Hospital & Professional Charges
- Modifiers
- Research Billing Corrections
- Investigational Drug
- Investigational Device
- Manual Corrections
- Billing Errors
- Resources

Research Billing Review Compliance

- Every Clinical Trial **MUST** be Reviewed According to Medicare Clinical Trials National Clinical Decision (NCD) if Medicare is to be Billed
- Study Patients Generate Billable Charges when Seen in Provider Based Clinic and/or Orders for Tests, Evaluations, & Procedures are Performed
 - Venipuncture, CMP, Echo, CT Chest with Contrast, Cardiac Catheterization, Implantable Device
- Linking Encounters & Orders to Research Study to Prevent Charges Covered by Research Study from Being Billed Directly to Insurance/Patient

Clinical Trial Unit Tasks

- Activating study in Epic
- 2nd Tier Review
- Research Pricing for Services & Meds/Agents
- Grant Pricing Sheet
- Investigational Device & Drug Billable Charge
- Research Corrections
- Training/Refresher Session
- Monthly Office Hour

Study Team Tasks

- Associating Patient with Research Study
- Linking Encounter & Orders
- Unlinking Encounters from Research Study
- 1st Pass Review & Re-review of Charges
- Notifying CTU of Late-linked Encounters & Billing Errors

Linking Encounter to Research Study

- Study Team is Responsible for **Linking** Encounter to Research Study Prior to the Date of Service
- Successful Linking Results in '**DO NOT BILL**' Status & Account pulls for Research Billing Review
- Patient Station in Chart
- My Patients with Appointments in the Next 14 Days
- Upcoming/Current Admissions for Patients on Study
- **ALWAYS** Link Encounter Prior to Date of Service
- Closed Encounters can be Linked by Creating an Addendum

Linking Order to Research Study

- Orders **MUST** be Linked when Order Placed
- Critical to Link Orders in Addition to Encounters to Ensure Charge(s) Pull for Research Billing Review
- Radiology and Cardiology Orders – Need to Ensure **Both Encounter & Order Linked**
- Orders Linked to Research Will Have 'DNB' Do Not Bill Status Resulting in Charges pulling for Research Billing Review Rather than Being Billed Directly to Insurance/Patient

Linking Order to Research study

Dx Association Edit Multiple Estimate **Options** ▼

This patient has active treatment/therapy

After Visit

Research Study Tubes

Routine, Lab Collect, Blood, Blood

CVS/pharmacy #10746 - Charlottesville, VA

434-245-0003

Providers
CC Results
Interactions
Create Panel
Routing
Financial
Research Association

PRINT AVS PEND ORDERS (1)

Order - Associate Research Studies

TRN Oncology

Research Study Tubes ☒

Accept Cancel

Unlinking Encounters from Research Study

- Medical Chart Review/Data Collection or No Billable Services Covered by Research Study
- Linked in Error by Scheduling or Registration
- Account/Date of Service Pulls for Research Billing Review
- Charges Cannot be Billed to Insurance/Patient until Research Billing Review is Complete
- Unlink Encounter to Remove Account from Research Billing Review



Research Pricing for Services & Medications/Agents

- Locate Pricing for Service with CPT Code
- Department Coders
- If Study Team Affirms Imaging Billed through UVA Imaging
- Uploaded to CRConnect by Clinical Trials Office

UVA Imaging Billing

- Technical Charges Invoiced Outside of Epic
- Location for UVA Imaging include Fontaine, Zion Crossroads, Ivy, Northridge
- Professional Charges are Reviewed in Epic
- Imaging on Research Scanners are **NOT** Billed through UVA Imaging

Grant Pricing Request Cart can be reviewed

Will this research study involve the use of imaging procedures that are billed through UVA Imaging?*

☒ Yes☐ No

I confirm I have created a Grant Pricing Request Cart in the Grant Pricing Request Application. *

☒ Yes☐ No

I confirm the Grant Pricing Request Cart name is exactly the same as the UVA Study Tracking Number shown on the top left corner of this page.

☒ Yes☐ No



Epic Dashboard Reports

- Patients Needing Research Billing Review
- My Patients with Appointments in the Next 14 Days Report
- Upcoming/Current Admission for Patients on Study
- Previous Admissions

Epic

58613 – (HSTSXAVM083 G1KM73 jlm6uw) – UVA RESEARCH – EMR PRD – JESSICA M.

Search (Ctrl+Space)

Paging System

Vocera

Patient Station

Research Study Maintenance

Research Studies

Telephone Call

Provider Finder

Orders Only

My Rep

Reports

Research Manager Dashboard

Active Studies by Type

Study Type	Count (approx.)
Expanded Access	1
Non-Interventional	10
Interventional	80

☒ Expanded Access

☒ Non-Interventional

☒ Interventional

Research Reports

Search for Patients or Studies

Find patients on research protocols

My patients on research treatment plans

My patients enrolled in a clinical trial (specify study)

Find Patients Associated with My Research Studies (edit to select criteria) UVA

Research Study Search (select criteria) UVA

Research Studies Created by Interface UVA

Patients with Medication Contraindications

Find Patients who are taking a contraindicated medication (change patient base) UVA

Adverse Events

Patients with Adverse Events

Adverse Events Needing Review (Specify Study) UVA

Search for Encounters to Link to Studies

My patients with appointments in the next 14 days (select study) UVA

Upcoming/Current Admissions for Patients on Study (select study) UVA

Search Previous Admissions (select criteria)

Review Charges for Studies

Patients Needing Research Billing Review (select study) UVA

Performing Billing Review

- Frequency of Billing Review
- Date of Service
- Billing Designation of Charge(s)
- Modifier Applied Correctly
- Research Correction
- Research Price

Research Billing Review for Einstein, Dimitri [5320994]

Refresh Filters Patient Studies Study Maintenance

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

TRN Insomnia

Study Code 12345	Study Status —	Study Type —	NCT # 73289123	IRB # GRT1234	Associated Protocols —
Enrollment Status Enrolled	Start Date 1/4/2018	End Date —	Coordinators —		

Admission at UVA University Hospital East

01/05/18 - 01/10/18 Study-Related

Hospital Account 13000001117 | Inpatient | DNB
AETNA - AETNA GENERIC

Mark as Reviewed

Charges Encounters

Research Correct

Group by: Revenue Code CPT®/HCPCS Code Svc Date Encounter Review Status None Other

Non-Study Charges

Research Correct All Select All Deselect All

Study Rvw	Svc Date	Post Date	Code	Procedure	Study Src	Qty	Amount
☐	01/05/2018	01/10/2018	12000000	HC SEMI-PRIVATE ROOM AND CARE	⚡	1	1,886.00
☐	01/06/2018	01/10/2018	12000000	HC SEMI-PRIVATE ROOM AND CARE	⚡	1	1,886.00
☐	01/07/2018	01/10/2018	12000000	HC SEMI-PRIVATE ROOM AND CARE	⚡	1	1,886.00
☐	01/08/2018	01/10/2018	12000000	HC SEMI-PRIVATE ROOM AND CARE	⚡	1	1,886.00
☐	01/09/2018	01/10/2018	12000000	HC SEMI-PRIVATE ROOM AND CARE	⚡	1	1,886.00
☐	01/09/2018	01/10/2018	70470	90001482-HC CT HEAD/BRAIN W&W/O CONTRAST	⚡	1	3,082.00
☐	01/09/2018	01/10/2018	80053	90000413-HC COMPREHEN METABOLIC PANEL	⚡	1	369.00
☐	01/09/2018	01/10/2018	95806	90004209-HC SLEEP STUDY UNATTENDED	⚡	1	1,928.00

Admission at UVA University Hospital East with Walt Whitecoat, MD

01/07/18 Study-Related

Guarantor Dimitri Einstein [100000392] | AETNA - AETNA GENERIC

Mark as Reviewed

Charges Encounters

Research Correct

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

Non-Study Charges

Research Correct All Select All Deselect All

Study Rvw	Svc Date	Post Date	Code	Procedure	Study Src	Qty	Amount
☐	01/07/2018	Pending	95808 (CP...	PR POLYSOM ANY AGE SLEEP STAGE 1-3 ADDL PARAM ATTND	⚡	1	290.00
☐	01/07/2018	Pending	99231 (CP...	PR S8SQ HOSPITAL CARE/DAY 15 MINUTES	⚡	1	99.00
☐	01/07/2018	Pending	99221 (CP...	PR INITIAL HOSPITAL CARE/DAY 30 MINUTES	⚡	1	255.00

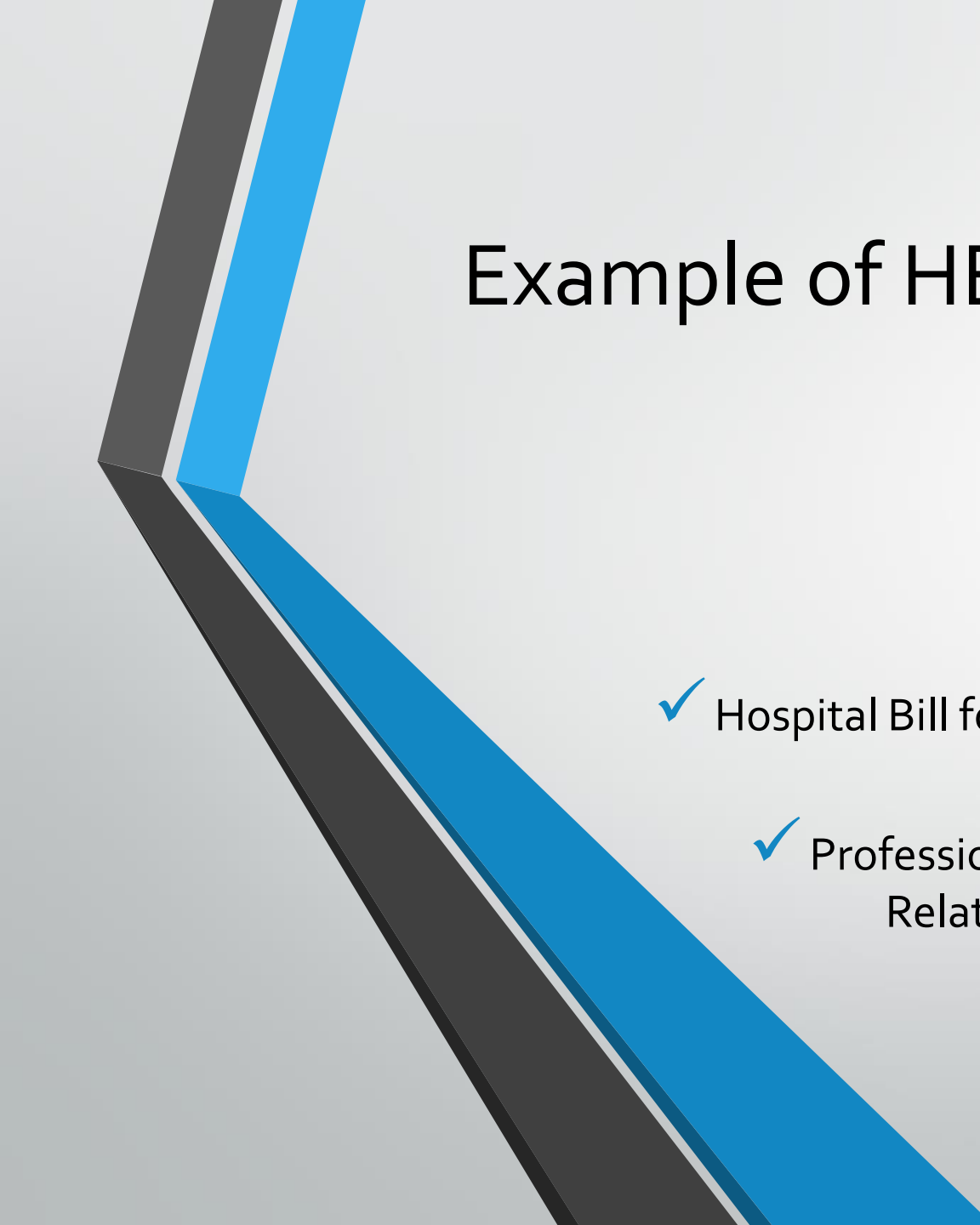
Types of Charges

Pink Banner

- HB – Hospital Bill
- Technical Charge for Service
- Billed through Patient Financial Services

Blue Banner

- PB – Professional Fee
- Professional Charge for Service
- Billed through University Physicians Group



Example of HB & PB Charge Review for Service

- ✓ Hospital Bill for Echo CPT 93306 - Reviewed as Study Related, Bill Insurance with Routine Modifier Applied
- ✓ Professional Bill for Echo CPT 93306 - Reviewed as Study Related, Bill Insurance with Routine Modifier Applied

Epic Billing Designation

- Bill to **STUDY**
- Study Related, Bill Insurance with **MODIFIER**
- Non-study Related, Bill Insurance
- Charges May Not Pull to the Correct Billing Designation

Modifiers –Study Related, Bill Insurance

Routine

- Applied for Services Reviewed as Study Related and Billed to Insurance

Investigational/Device

- Applied **only** to Investigational Device Charge Reviewed as Study Related and Billed to Insurance

PB No Charge Modifier – Professional Charges Bill to Study

- Only Applied to Professional Charges
- Federally Funded Research Study as Grant Cannot be Billed Twice for Same Service
- Imaging where Professional Read not required
- Must Bill to Study

Research Correction

- Select Charge(s) Needing Correction
- Research Correction Button
- Accept
- Complete Review
- Research Corrections Occurring During 2nd Tier Review Result in Account Requiring **Another Round of Review** by Study Team

Symbols & Service Details

- Green Checkmark
- Red Flag
- Asterisks
- Right Click on Service to View Details

Investigational Drug & Medications

- Investigational Pharmacy Generates Token Charge (\$0.01)
- HB Charge Posts as HSR Drug Name or HSR Dispense Prep Override
- Insurance CANNOT bill for Administration without Drug Charge
- Insurance CANNOT bill for Drug without Administration Charge
- MAR Summary & BCA
- Outpatient Meds Do NOT Bill within Epic

Example of HSR Drug & Administration Billing to Study

Research Correct

Group by:

Revenue Code
CPT®/HCPCS Code
Svc Date
Encounter
Review Status
Protocol Day
None
Other

Study-Related - Bill to Study

Research Correct All

Select All

Deselect All

Bill	Study	Svc Date	Post Date	Code	Procedure	Study Src	Rsh Amount	Qty	Amount	
☐			11/20/2024	11/26/2024	25000001	HSR DISPENSE PREP OVERRIDE BARCODE		0.01	1,800	0.01
☐			11/20/2024	11/26/2024	96401	90001386-HC CHEMO SQ/IM NON ANTI-NEOPLAST		47.00	1	453.00

Study-Related - Bill to Insurance/Patient

Research Correct All

Select All

Deselect All

Bill	Study	Svc Date	Post Date	Code	Procedure	Study Src	Rsh Modifier	Qty	Amount	
☐			11/20/2024	11/26/2024	36415	90000405-HC VENIPUNCTURE		Routine	1	37.00
☐			11/20/2024	11/26/2024	85025	90000802-HC COMPLETE CBC W/AUTO DIFF WBC		Routine	1	153.00
☐			11/20/2024	11/26/2024	80053	90000413-HC COMPREHEN METABOLIC PANEL		Routine	1	295.00

Example of Drug & Administration Charge Billing to Insurance

Study-Related - Bill to Study

Select AllDeselect All

Revenue Code	Description	Qty	Total Amount
☒ 0250	PHARMACY - GENERAL CLASSIFICATION	1,800	0.01
☐ 0300	LABORATORY - GENERAL CLASSIFICATION	14	1,753.00
☐ 0510	CLINIC - GENERAL CLASSIFICATION	1	74.00

Itemized Charges

Research Correct AllSelect AllDeselect All

Bill	Study	Svc Date	Post Date	Code	Procedure	Study Src	Rsh Amount	Qty	Amount	
☐	☒	☒	11/22/2024	11/26/2024	25000001	HSR DISPENSE PREP OVERRIDE BARCODE	☒	0.01	1,800	0.01

Study-Related - Bill to Insurance/Patient

Select AllDeselect All

Revenue Code	Description	Qty	Total Amount
☒ 0250	PHARMACY - GENERAL CLASSIFICATION	3	1.34
☒ 0331	RADIOLOGY - THERAPEUTIC AND/OR CHEMOTHERAPY ADMINISTRATION - CHEMOTHERAPY ADMINISTRATION - INJECTED	2	906.00
☒ 0636	PHARMACY - EXTENSION OF 025X - DRUGS REQUIRING DETAILED CODING (A)	195	1,290.36

Itemized Charges

Research Correct AllSelect AllDeselect All

Bill	Study	Svc Date	Post Date	Code	Procedure	Study Src	Rsh Modifier	Qty	Amount	
☐	☒	☒	11/22/2024	11/27/2024	25000001	ACETAMINOPHEN 325 MG TABS	☒	Routine	2	0.97
☐	☒	☒	11/22/2024	11/27/2024	25000001	DIPHENHYDRAMINE 25 MG CAPS	☒	Routine	1	0.37
☐	☒	☒	11/22/2024	12/19/2024	96401	90001386-HC CHEMO SQ/IM NON ANTI-NEOPLAST	☒	Routine	2	906.00
☐	☒	☒	11/22/2024	11/27/2024	J9041	63611111-BORTEZOMIB 3.5 MG SOLR 1 EACH VIAL	☒	Routine	23	762.86
☐	☒	☒	11/22/2024	11/27/2024	J9041	63611111-BORTEZOMIB 3.5 MG SOLR 1 EACH VIAL	☒	Routine	12	437.14
☐	☒	☒	11/22/2024	12/18/2024	J8540	63611111-DEXAMETHASONE 4 MG TABS	☒	Routine	80	45.18
☐	☒	☒	11/22/2024	12/18/2024	J8540	63611111-DEXAMETHASONE 4 MG TABS	☒	Routine	80	45.18

Investigational Devices

- Device Information Provided by the Study Team to the CTU
- How the Device will be **BILLED** - \$0.01 versus Clinical Cost
- Where Procedure Occurs
- Who Should be Notified to Establish IDE billing Process
- Status of Palmetto GBA (Part A and Part B)
- NCT Number

Investigational Device

- MC Finance Generates Unique **Epic Code with Corresponding Price & FDA IDE#**
- Study Team Notification of Scheduled Procedures – including FDA IDE# & Epic code
- Study Team Watching for HB Charge for Device under **Revenue Code 0624**
- Apply **Investigational/Device Modifier** to Device Charge Reviewed as Study Related, Bill Insurance

Quirks of Billing Review

- Outpatient Charges Lumped in with Admission Charges
- Room & Care Charge Reviewed as Bill to Service Requires **ALL** Services on that Date of Service to be Billed to Research Study
- HB Charge and PB Charge May not Pull for Billing Review Together
- PB Charge for Service May have **Different Date of Service**
- \$0.00 Balance Accounts Need Billing Review
- Re-review of Charges May Require Team to Utilize Hyperlinks to Complete Billing Review

Manual Corrections

Performed After Charges have been Billed

- Late-Linked Encounter
- Patient Billed
- Disputed Claims
- Revenue Integrity Request
- Collections

Late-Linked Encounter

- Email HSR IRB#, Patient Name, MRN, Date of Service, Services Needing Correction to Bill to Study
- Correction Requests through Patient Financial Services, University Physicians, and UVA Imaging
- HB & PB Charges will Pull for Research Billing Review for Study Team to Make Corrections During Billing Review
- Ensure Charges are Reviewed with Correct Billing Designation

Errors During Research Billing Review

- Reviewing HB and PB Charge for Service with Different Billing Designations
- Point of Care Testing, Contrast, CDSM NDSC NOT Reviewed with Billing Designation of Imaging
- Medication Administration Billing Designation
- Failure to Apply Modifier
- Applying Incorrect Modifier



Research Billing Resources

- Epic Learning Library Research Tip Sheets
- Drop-in Hours Every 2nd Wednesday 10-11AM
- Schedule Training Session
- Direct Support

Activity Code

Activity Code: **27049**

Instructions for claiming credits/contact hours can be found [here](#).

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