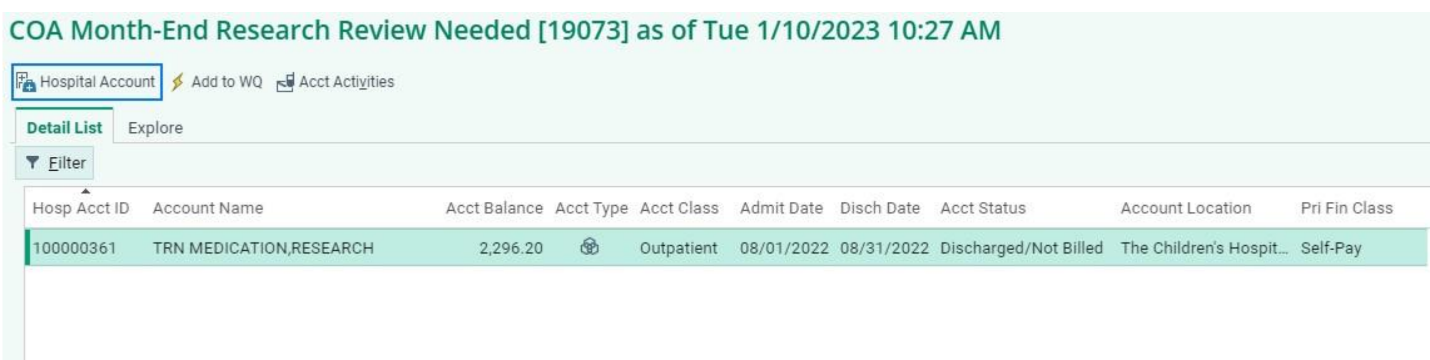
Clinical Research Coordinator – Month-End Review of Research Study Accounts

Finding your Studies that Require Review

As with many research workflows, the Month-End Review workflow is launched from reporting. In order to find the study accounts that require EOM review, use the “COA Month-End Research Review Needed” report.

This report can be found in the Research Reports section of your dashboard or by searching the analytics catalogue (clicking on the title of your dashboard and typing the report name into the search bar that appears).

Once the report has run, it will display all study accounts that require month-end review. Filter the account name column to find the name of your study. NOTE: the account will be for a “patient” with the name of your study.



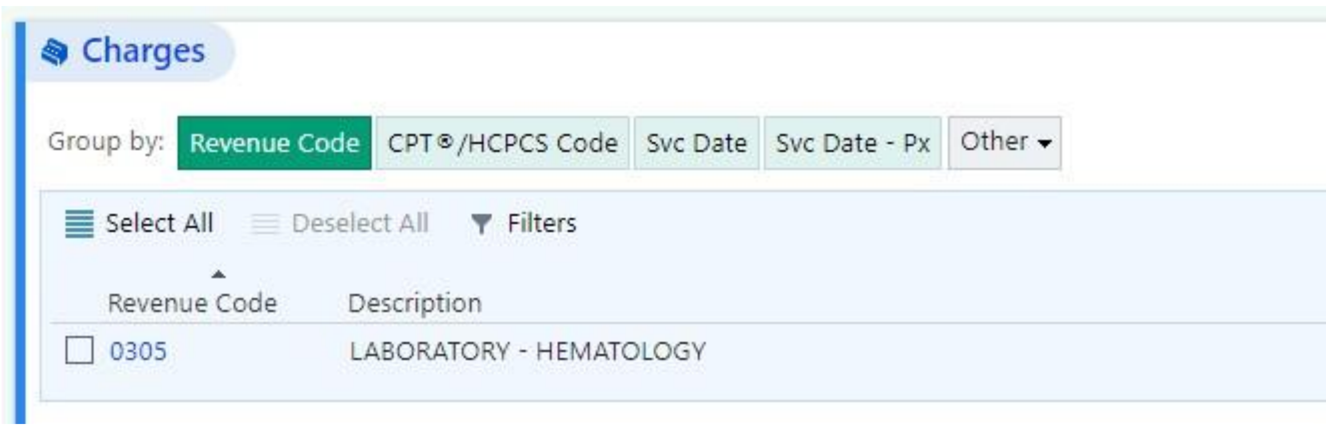
Select the account and click the **Hospital Account** button in the report toolbar. *This process occurs over at least two days.

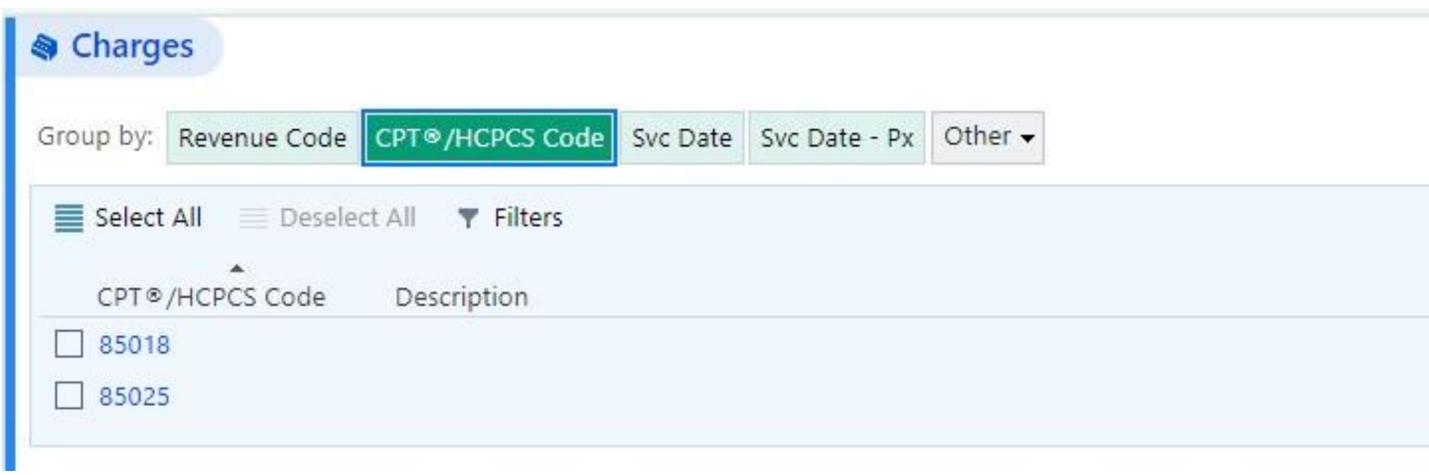
Performing your Review

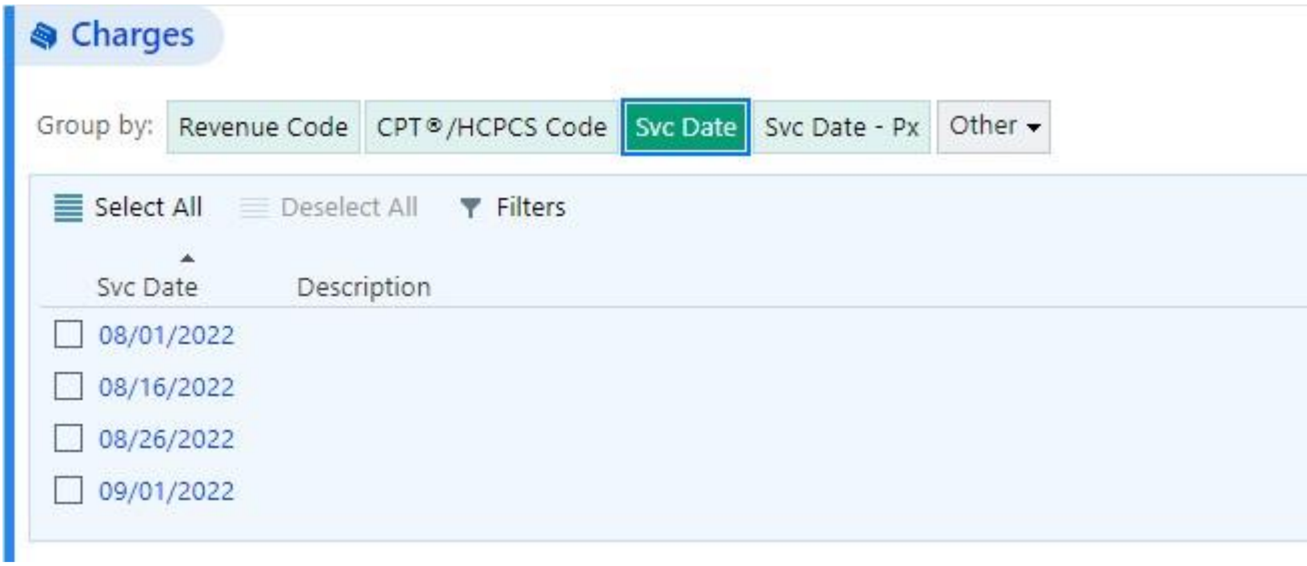
Day One

To perform your review, you will need to navigate to the **Hosp TX Inquiry** tab in the top toolbar of the account activity, which you accessed in the last step.

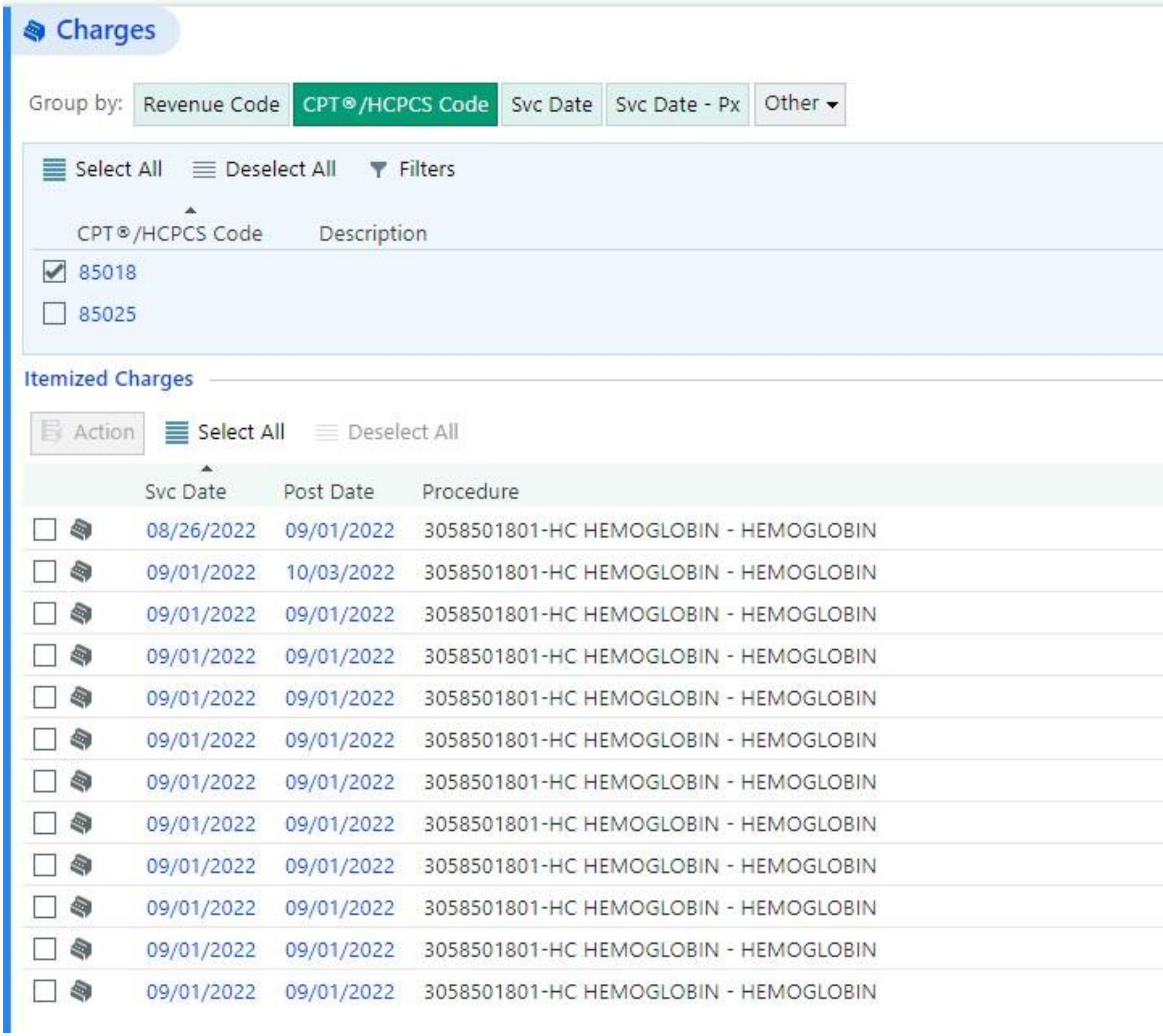
When in **Hosp TX Inquiry**, you can see the charges billed to the study account. You can filter these by a number of different criteria using the "Group by" option at the top of the charges section:






Charges
Group by:
Revenue Code
CPT®/HCPCS Code
Svc Date
Svc Date - Px
Other
Select All
Deselect All
Filters
Svc Date
Description
08/01/2022
08/16/2022
08/26/2022
09/01/2022

Selecting the checkbox next to one of the groupings , it will expand to the group to display all charges in that grouping.



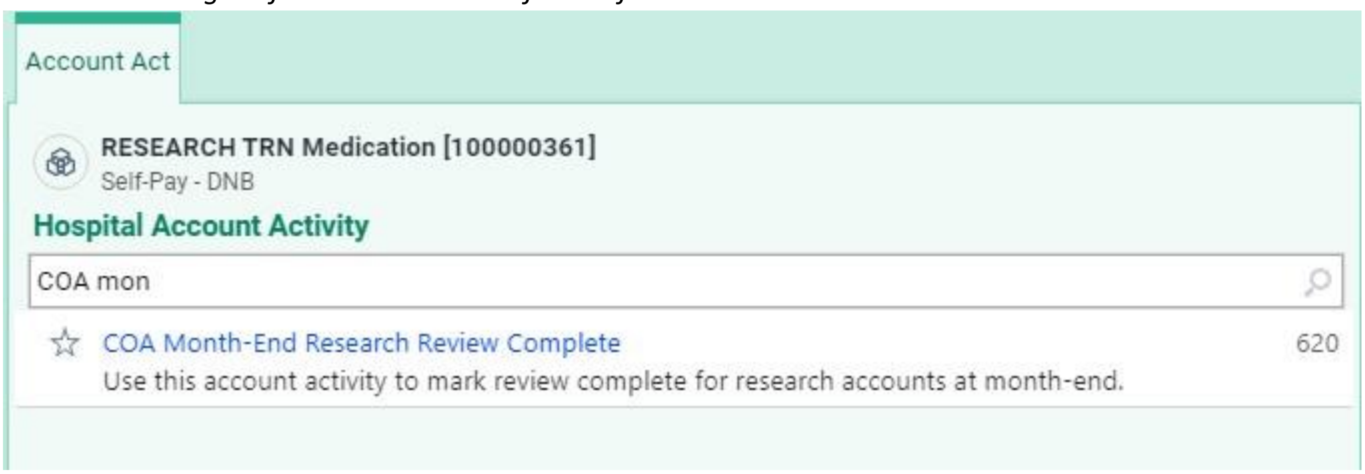
From here, you can confirm that all charges listed are those that are expected to be billed to your study. **NOTE.** *If your study pays for medications or supplies, this report will show the standard of care price. The invoice will include an adjustment for the difference after the EOM review is complete and goes through nightly processing.*

All Other charges should reflect research pricing, if not, please reach out to Pam Barlow and/or the Westerkamp group to have the charge for this account re-priced, and a ticket should be placed to get the price corrected in the fee schedule.

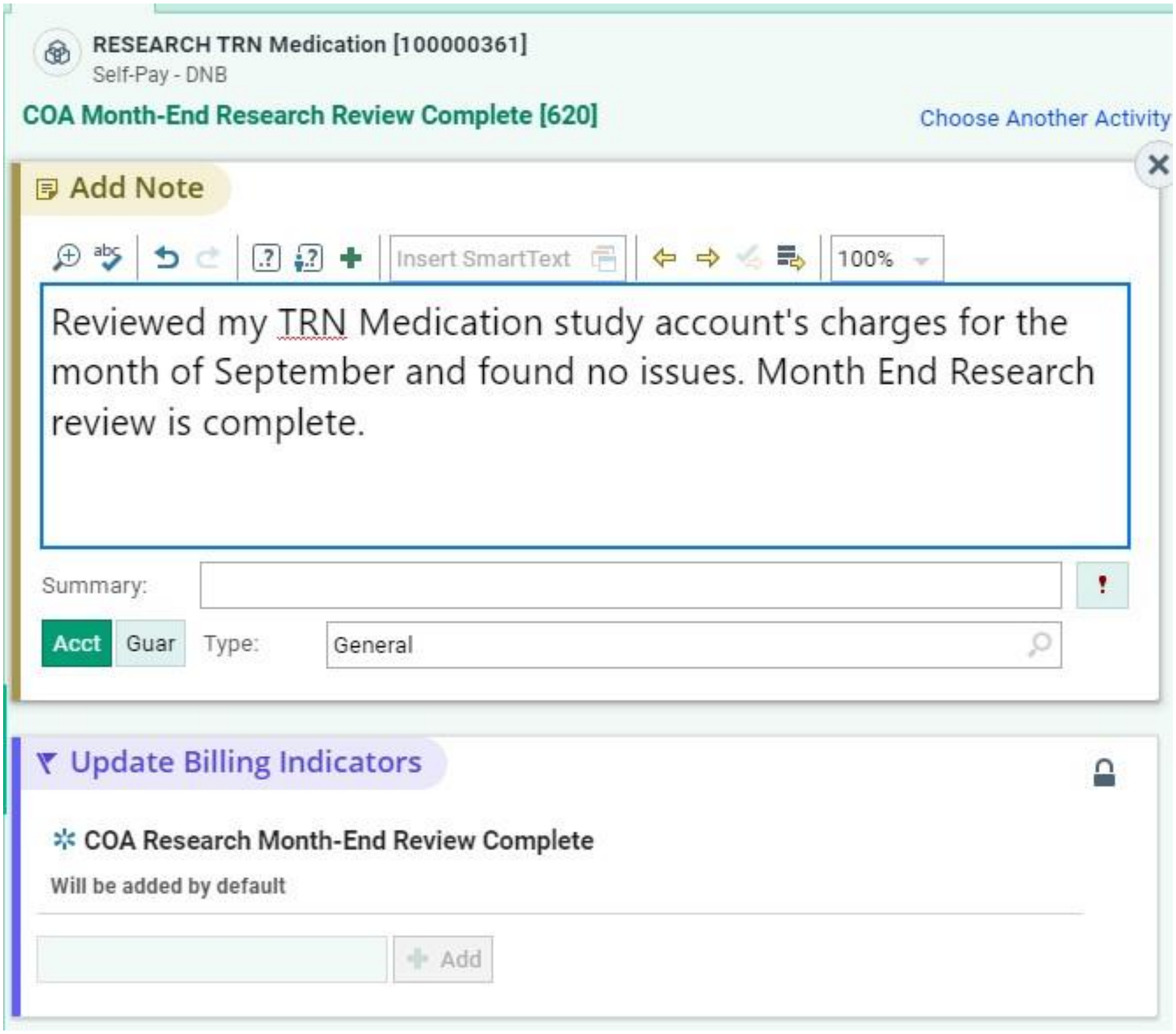
If you do see charges that should be billed to the patient (and not the study account) reach out to the Westerkamp Group (rgunn@wgrcm.com; pryan@wgrcm.com; nharig@wgrcm.com) to get this charges correctly apportioned to the patient account. Once this is done, or if there were no charges inappropriately billed to the study account in the first place, you can sign off on your review using **Account Activities**.

1. Navigate to the **Account Activities** button in the tool bar of the account activity:

2. Select the **Account Activities** button and type "COA Month-End Research Review Complete" into the search bar that appears (you can completion match with a fraction of this full phrase): **You can click on the star to the right of the action to save for the future.*



3. Select this activity and leave a note indicating your review is complete and click on **Accept**.



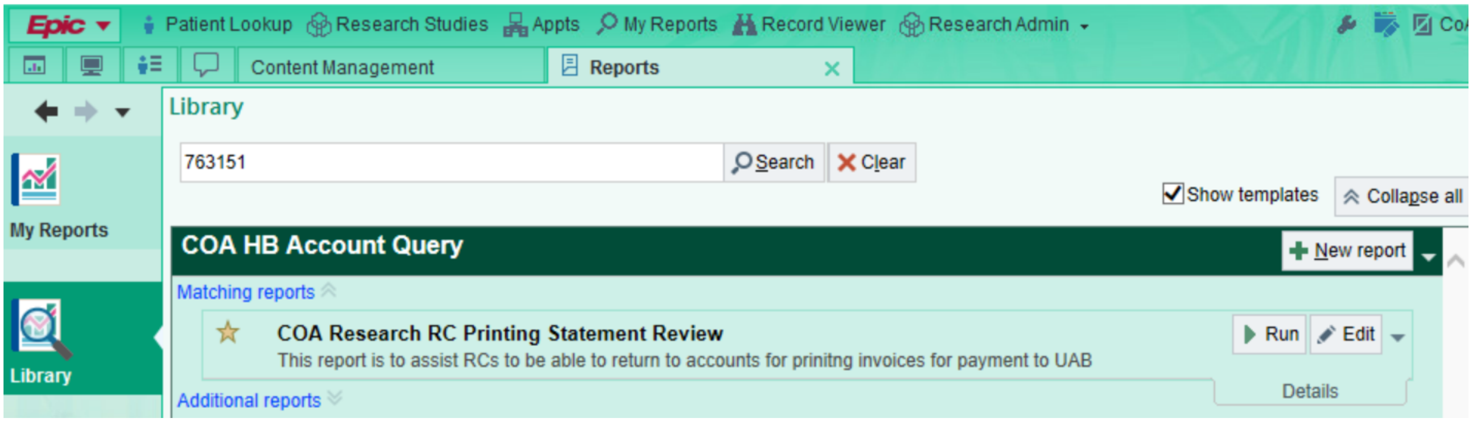
Once done, this account will fall off the report following nightly processing and continue through the billing process to create an invoice that will be delivered to Westerkamp Group for processing and delivery.

Printing End of Month Research Invoices

Day Two

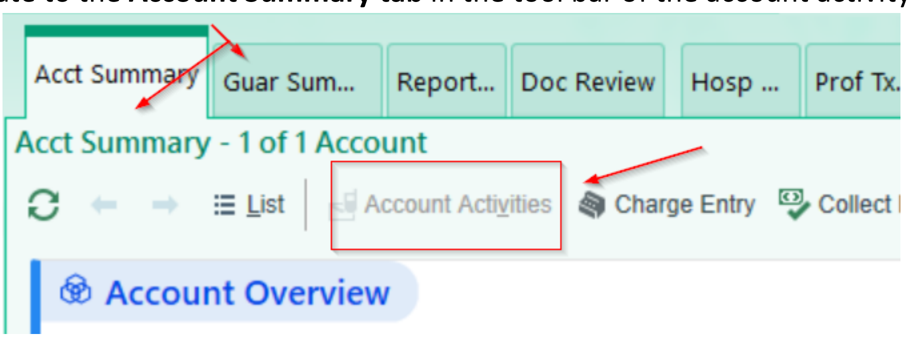
Research coordinators will print EOM statement/invoice[i] to determine the final payment to be sent to UAB. Research Coordinators will need to wait until at least the next day to complete this process after the EOM billing review is completed.

Like other research workflows, you will need to run a report to help to identify the specific research account to print. This report can be found under in the library under the “My Reports” tab under the Epic button. **COA Research RC Printing Statement Review [763151]”** report. Click **Run.**

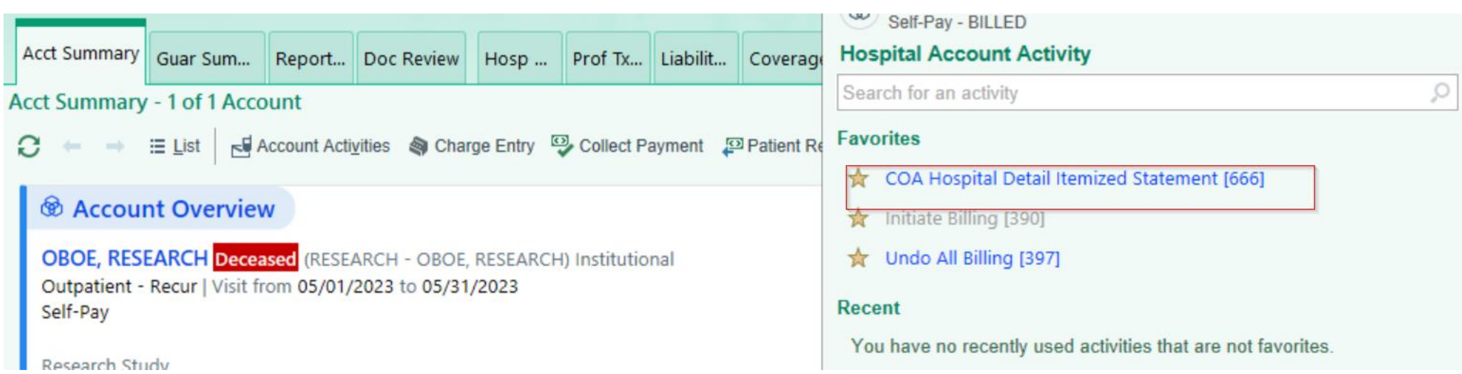


Once the report is complete, it will display all study accounts. Choose the account you wish to print the statement. Double click on the specific account from the report and it will open to the following:

1. Navigate to the **Account Summary tab** in the tool bar of the account activity:

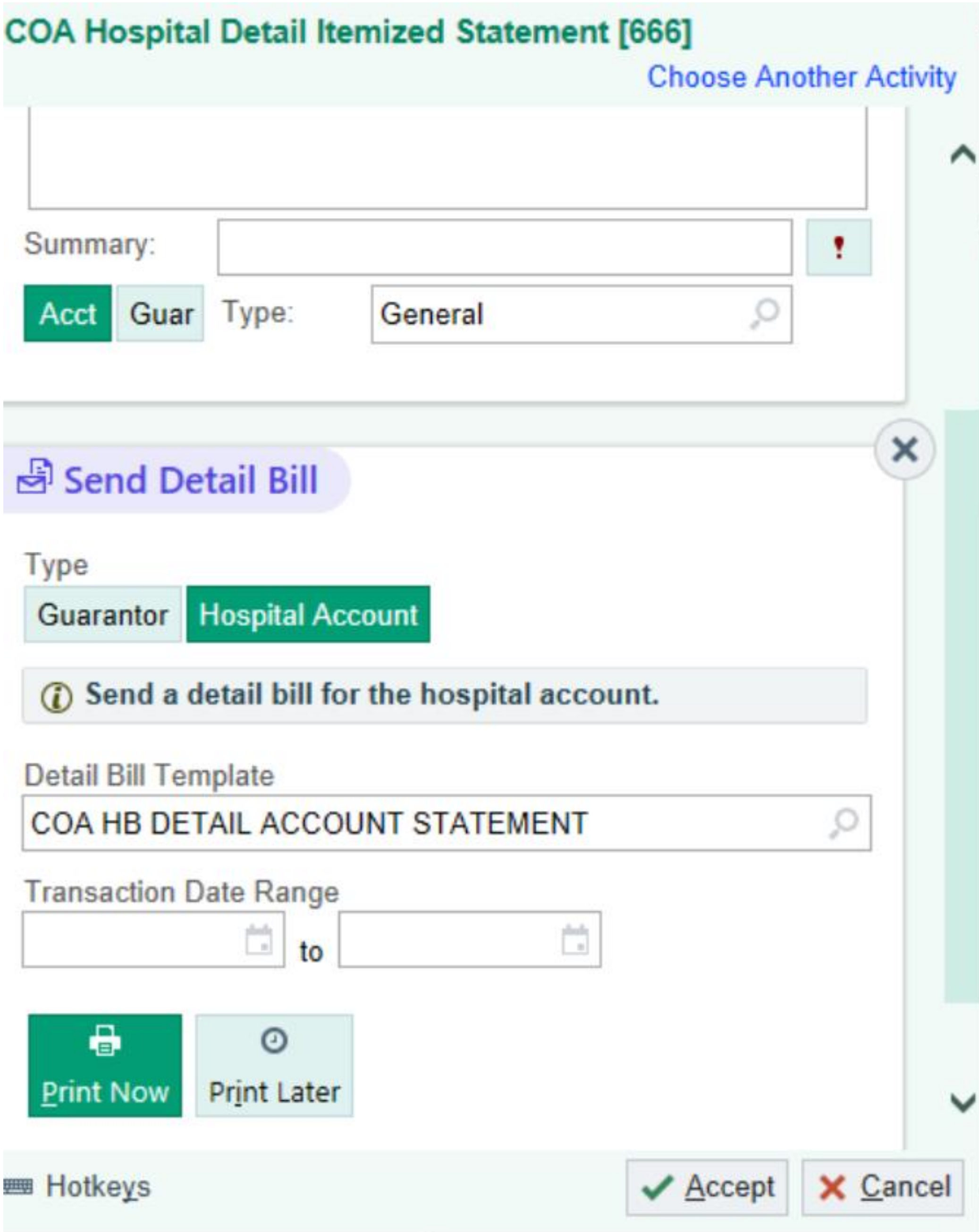


2. Select the **Account Activities** button and type “**COA Hospital Detail Itemized Statement [666]**” into the search bar that appears (you can completion match with a fraction of this full phrase): *You can also star this action for easier access.*



3. From the sidebar, scroll down to the “**print now**” button and **click**.

4. Click "**Accept"**



This will provide you with the final billing Invoice for payment to be sent to your designated financial representative.

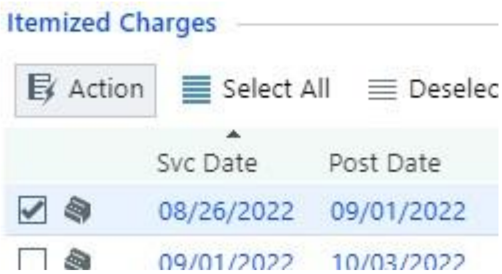
Policy

There are a few special scenarios where your review might differ slightly:

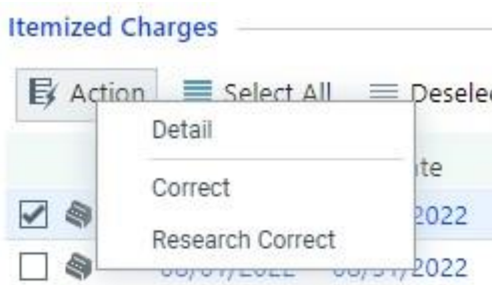
Research ECHO

If your study involves Research-Only ECHOs, the Heart Center will handle the billing for these procedures. A charge will still be generated in Epic but needs to be written off. To perform a write-off, follow the below steps

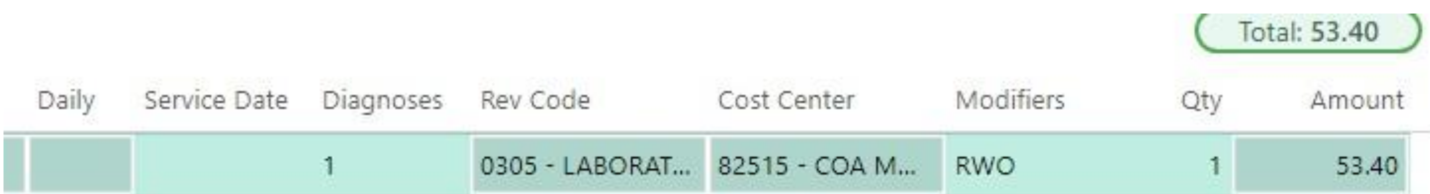
1. Select the charge you are writing off (in this case the Research ECHO charge) and select the **Action** button:



2. Select **Correct** in the drop-down list that appears:



3. Navigate to the **Modifiers** column in the table that appears and type “RWO”. This stands for Research Write-Off and will make sure that the charge falls off the account.



Notify Krissie Hock (Kristalhock@uabmc.edu) of the Heart Center outside of Epic to make sure the Research ECHO is billed to the study account—however, your work in Epic is complete.

Research Write-Off for non-budgeted charges

In rare circumstances, certain charges will be billed to the study account that should not be billed to the patient but were not budgeted for by the study. If you find one of these charges, you need to contact the Westerkamp Group, Pam Barlow, and the individual who created your budget to inform them of the issue. Once informed, if approval is granted, this charge can be written off in the same manner as the Research ECHO above.

- Note that this is a highly audited process and should only be done once approval is granted.

<u>Reviewing research charges for pharmacy and central supply</u>

In some instances, If your study pays for pharmacy or central supply charges, be aware that during the EOM review process the study account in Epic will show the full standard of care price for the pharmacy or central supply charge (rather than a discounted research price). After you complete the EOM review process explained above, Epic will apply an adjustment, discounting the pharmacy or central supply charge appropriately. Research coordinators will see these adjustments on the invoice. A summary of the order of events is below:

1. Research coordinators will review and apply a billing indicator signifying their signoff; at this time med and supply charges are assigned full price
2. After the indicator is added, during overnight processing, if no other DNBs are on the account, billing initiates
3. When billing initiates, adjustments are applied, including a credit of 85% for all med and supply charges on the research study account
4. A final statement will need to be printed. This statement will have the updated charges and should be used for payment to UAB.

[i] As of 8-31-2023