CLINICAL TRIALS: CHARGE REVIEW
Revised September 26, 2023

OVERVIEW

- **Description:** Research Billing Charge Review is reviewing and approving research-related charges within CareConnect. A number of tools have been implemented to view Hospital Billing (HB) and Professional Billing (PB) charges for studies. Clinical Trials will incur patient care and related expenses, such as hospital/professional billing. The following process takes place prior to hitting General Ledgers. This is not a Fund Manager responsibility as the approvals for charges on patient care related items are centralized and completed by Department of Medicine.

- **Due** (minimum)**:** 10 calendar days (includes weekends). Recommend study coordinators entering patient data in Care Connect and/ OnCore as applicable within 24 hours after visit occurrence.

- **Programs**
  - **CareConnect** is UCLA's electronic health record (EHR) program, which integrates inpatient and outpatient clinical records with appointments, registration, billing, and other business-related functions throughout UCLA Health System and David Geffen School of Medicine. CareConnect puts an increased emphasis on patient safety and medical error prevention by creating one electronic patient chart that's accessible across the institution, increasing the continuity of care. By housing all patient information in one electronic database, it eliminates the duplication of tests, sends alerts to warn of allergies to medications or contradictions and creates an easily accessible mechanism for sharing information.

    1) Who uses CareConnect and Research Connect?
       Physicians
       Pharmacists
       Nurses
       Advanced-practice nurses
       Other clinicians
       Trainees (fellows, residents, interns)
       Students
       Staff members working with scheduling, registration, billing, patient placement (ADT), and health information
       management (HIM)
    2) Register in Cornerstone to complete required training to receive access to Oncore/CareConnect: ELRSH100, RSCH160, RSCH210, and RSCH215.
    3) Register here to complete required training to receive access to CareConnect.

  - **OnCore** is a clinical trials management system (CTMS) used at UCLA for the management of clinical trials in clinical research. The system maintains and manages planning, performing and reporting functions at the study and subject level along with participant contact information, tracking deadlines and milestones.

  - The use of OnCore enables the study team to set up and manage all protocols and subjects in one place, supports clinical research billing, simplifies data management and

monitoring, improves patient recruitment and tracking and automates the flow of information between UCLA based systems including WebIRB, PATS and CareConnect.

- OnCore is managed and maintained by the UCLA Clinical Research Informatics Systems (CRIS) team, which works closely with study teams to incorporate OnCore into their workflows for more efficient clinical research operations and centralized data management. The CRIS team works collaboratively with the Clinical Research Finance team, Clinical Research Business Partners (CRBP) and Research Connect team members to provide a variety of data solutions and operation management tools for clinical research teams.

- **Mechanism:**
  - A two-Tier Process:
    1) Tier 1 – Department of Medicine Charge Reviewer and Study Team are responsible for reviewing and approving charges that are reviewed in the Care Connect dashboard queue. Once charges are directed to (1) Study Related— Bill to Study, (2) Study Related – Bill to Patient's Insurance, and (3) Non-Study – Bill to Patient's Insurance, it will be submitted as reviewed then go to Tier 2.
    2) Tier 2 – CRBP unit will also review as a double-check on charges already approved by Tier 1 and address hiccups as necessary.

Processing Time: Charges are reviewed daily by Charge Reviewer, and new charges drop every 3-4 hours in the dashboard queue. DOM has 7 business days to complete. After, Tier 2 has the same timeline. All charges on Dashboard are reviewed timely. Both DOM and CRBP work together to assure timely approvals.

FAQs

1. **Who to contact should there be any questions, where to look for contacts?**
   Centralized Research Business Partners(CRBP) UCLAHSCRBP@mednet.ucla.edu

2. **What do I do if the calendar build is not in OnCore? Look in chart notes?**
   To check if charges are study related bill to study or non-study related bill to insurance if not in On-Core, we look at the notes in CareConnect.

   Go to patient charge in CareConnect> Click the link under the Enrollment Status (see image)

> Click on the Appts on the top menu > Click Past tab to show the past encounter dates for the charges

** Check Appt notes: The study team adds a note that charges for the service date are to bill the research/grant if procedures are study related

** It will also show a link icon if it is linked to the study under research section

** Click on the Chart tab > Click on the service date to review the notes and to match procedures with the charges

** Email the study team to confirm charges if study related bill to research or non-study related bill to insurance if charge reviewer not able to match charges with the notes or not clear.

3. What do I do if new charge is already in the red on my queue?
It will have the same 10 calendar days (includes weekends) before it falls off the queue as the new white charge.

4. How do I prioritize charges?
Prioritize line items in Red (these will soon fall from the queue) and then yellow (halfway to fall off) and white (newly added)

5. How do I filter?
Sort the queue by the top row ex. Earliest dt to see by color/ date

6. What charges should I expect to find in the Research Billing Review?

When a subject is enrolled to a clinical trial in Epic, all research-related encounters (orders, appointments, procedures, etc.) must be linked to the study in the system. Once this linking has occurred, any charges generated in conjunction with the encounter will be directed to the Research Billing Review for study staff validation/redirection prior to being released to bill the subject/insurance or the study code.

Study staff should expect to find both hospital charges (also called "technical" charges) and professional charges in the review. A hospital charge is a charge for the item itself (e.g., an x-ray). The professional charge is for the professional who provides a related service (e.g., the radiologist who reads and results the x-ray). You can tell hospital and professional charges apart in the Research Billing Review by the color of the header at the top of each account.

Not all charges include both hospital and professional components. Some may have only one or the other. Additionally, a single hospital charge may be associated with multiple professional charges and vice versa.

7. Patient provided a bill to study team, the bill should have been billed to research, how do I resolve the billing matter?

Contact CRBP (UCLAHSCRBP@mednet.ucla.edu) by sending an email request to correct the submission of billing, provide the patient name, MRN, IRB#, date of service, the charges that needs to be corrected.

Email sample below

CRBP Team will email back when the billing issue has been corrected.
Email the study team that billing issue has been resolved and the study team will inform the patient.

8. **What is a Professional fee?**
Physician side of a patient encounter, covers the work performed by the provider and the reimbursement they will receive for the medical services performed

9. **What is a facility fee?**
A facility fee is a fee we charge for the use of our clinics and related ancillary services
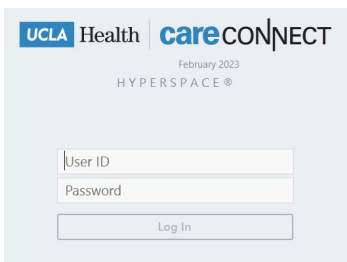
Applications to use for review:

1. CareConnect- To see accounts to review and to approve (Remote access | Local Access)
2. Oncore- To verify the account
3. Email- To email study team for confirmation
4. Chargemaster- To match/compare cost

PROCEDURE: How to complete Charge Review

STEPS:
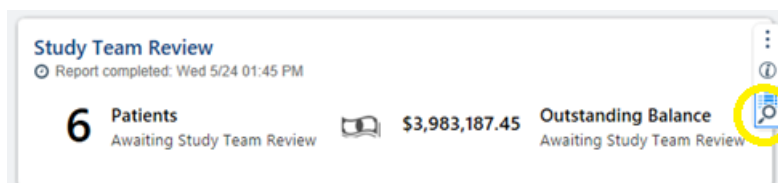
1. Log in to Care connect app > Enter username & password

2. Run the Study Team Review Report > Click the magnifying glass to open the queue

**The queue list will load: Prioritize line items in Red (these will soon fall from the queue) and then yellow (halfway to fall off) and white (newly added)

3. Sort the queue by top row ex. Earliest date to see by color/date

4. Double click on the patient

***It will take you to the page below (image for reference only)

** HB account (in Pink 🏥 hospital building in the top left corner), PB account (in Blue 👜 doctor's bag)

5. To check in Oncore or CareConnect if charges are study related bill to study or non-study related bill to insurance :

        5.A Click the link under the Enrollment Status (see image)

Research Billing Review for [redacted]

⟳ Refresh ▼ Filters ⊕ Patient Studies ⊛ Study Maintenance

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

⊕ **PULM A1BC Alpha-1 Antitrypsin**

Study Code	Study Status	Study Type	NCT #	IRB #
[redacted]	Open to Accrual	Non-Interventional	05297812	[redacted]

Enrollment Status	Active Start Date	Active End Date	Study Division or Department	Coordinators
Eligible ⤢	—	—	—	Donghyun TERM-Jung

🧳 **CT CHEST WO CONTRAST Visit at 200 UCLA Medical Plaza - Radiology with Igor Barjaktarevic, MD**

07/12/23	Study-Related	Guarantor Allison Moore [1001598839] ⤢
		Self-Pay

> Click on the Appts on the top menu > Click Past tab to show the past encounter dates for the charges
** Check Appt notes: The study team add a note that charges for the service date are to bill the research if procedures are study related
** It will also show a link icon if it is linked to the study under research section

** Click on the <u>Chart</u> tab > Click on the service date to review the notes and to match procedures with the charges

** Email the study team to confirm charges if study related bill to research or non-study related bill to insurance if charge reviewer not able to match charges with the notes or not clear.

  5.B Log in to ONCORE with your credentials (on another window: chrome)
        https://crmsprod.mednet.ucla.edu/forte-platform-web/login
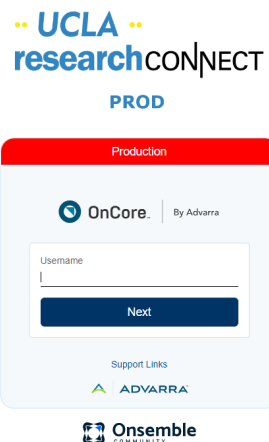
6. Go to menu > Subjects > CRA console (Click the star to bookmark)
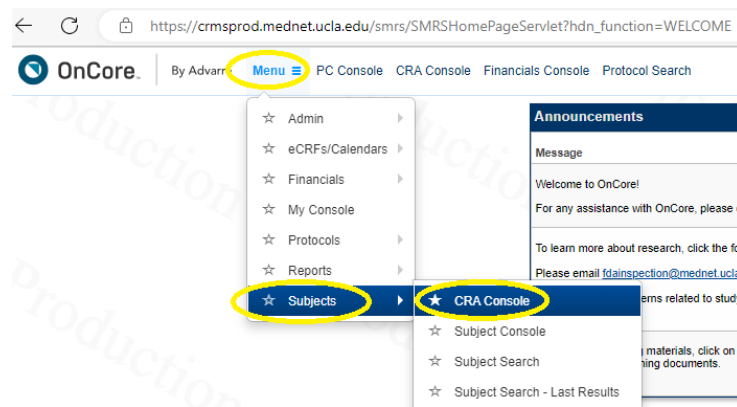
7. Type in IRB# in the Protocol search

8. Look for the subject by MRN# or name of the patient that you are working on from CareConnect

> click on the MRN# of the patient and it will take you to the next page

**Sometimes it doesn't show the MRN due to approve access, look for the initials of the patient which First name initial, Last name initial and click on it.

> Click on the initials or MRN of the patient- it will take you to this page (image below)

>Click on the Calendar on the vertical menu – it will show the calendar build of the patient

** You can see if the study team updated the visit, look at the <u>Week, Visit Status, Visit Date</u>
> Click the <mark>underlined blue link</mark> on top of the date of service.

★ Subject Console

Protocol No. 21-001001
MRN 7046532

Protocol Status: **OPEN TO ACCRUAL**
Subject Name: **NESSIM IBRAHIM**

Switch Subject
Type here to search ▼

Summary
Demographics
Consent
Eligibility
On Study
Treatment
Follow-Up
SAEs

Calendar »

Additional Visits
Payments
Deviations
Documents/Info »
Protocols
MRN
CRA Console
PC Console

| Calendar | Orphaned Visits |

[Freeze Panes] [Summary] [Manage Optional Segments]

Current Subject Calendar Version - V1

Procedure Toggle Full Screen	Forms	Pre Screening 1@30Days	Screening 1@14Days	4-week safety visit 28@28Days	Intervention Period 1,31,91,181,271,361,481,601,721	
		1	2 (C)	3	4 (C)	5
		Pre-screening Up to 30 days prior to screening³	Screening 14 to 3 days before Day 1 Visit 0	28 days post uptitration or reinitiation/ UT	Day 1 / Visit 1	Month 1 / Visit 2
Planned Date		04/19/2023	05/19/2023	06/06/2023	05/10/2023	06/09/2023
Visit Status		N/A	Occurred		Occurred	
Visit Date		04/19/2023	04/26/2023		05/10/2023	
Pre-screening consent		X				
Informed Consent			X			
Informed consent for genetic sampling (optional) ¹			X			
I/E criteria			X		X	
Demography			X			
Full physical examination with height and weight					X	
Weight only			X			X
Medical history ²			X			
Randomization					X	
EQ-5D-5L ³					X	
Serum or urine pregnancy test ⁴						
Full clinical						

** You will see the procedures done on the date of service to review and approve charges in CareConnect.

Protocol No.: 22-001919	Protocol Status: OPEN TO ACCRUAL	Subject Status: ON STUDY
MRN: **********	Subject Name: **********	Sequence No.: 2384002601

Visit Details   Phase: Treatment Visit: Up to -8 weeks to -2 weeks Version: V1 (05/08/2023) [History]

Visit Date *	[09/06/2023] 📅	Visit Status ○ Planned ◉ Occurred ○ Missed ○ N/A
Visit Description		Reset Calendar? [No ▼]
Data Collection Completed Date	[ ]	Monitored Date [ ] Submitted Date [ ] Locked Date [ ]
Collection Location [▼]		Collection Time (hhmm) [ ]
Clinical Comments	[ ]	
	1000 character(s) remaining	
Data Comments	[ ]	
	1000 character(s) remaining	

Procedure	As Needed	Procedure Date	SOC	SOC Modifier	Missed	Missed Count	N/A	
Informed consent		09/06/2023 📅	☐		☐	[ ]	☐	
Demographics		09/06/2023 📅	☐		☐	[ ]	☐	
Review of eligibility criteria		09/06/2023 📅	☐		☐	[ ]	☐	
Medical history		09/06/2023 📅	☐		☐	[ ]	☐	
Smoking Status		09/06/2023 📅	☐		☐	[ ]	☐	
HADS [3]		09/06/2023 📅	☐		☐	[ ]	☐	
C-SSRS [4]		09/06/2023 📅	☐		☐	[ ]	☐	
Physical examination		09/06/2023 📅	☐		☐	[ ]	☐	
99213 - RSH OFFICE/OUTPT VISIT,EST,LEVL III ▼								
Height		09/06/2023 📅	☐		☐	[ ]	☐	
Weight		09/06/2023 📅	☐		☐	[ ]	☐	
Vital signs [5]		09/06/2023 📅	☐		☐	[ ]	☐	
12-lead ECG		09/06/2023 📅	☐		☐	[ ]	☐	
93000 - RSH ELECTROCARDIOGRAM, COMPLETE ▼								
Chest HRCT central Review [6, AN]	Yes	09/06/2023 📅	☐		☐	[ ]	☐	
[-] Spirometry [7]		09/06/2023 📅						
Charge Master Events								
94010 - RSH BREATHING CAPACITY TEST			☐		☐	[ ]	☐	
[-] DLCO		09/06/2023 📅						
Charge Master Events								
94729 - RSH CO DIFFUSING CAPACITY			☐		☐	[ ]	☐	
Laboratory tests [9]		09/06/2023 📅	☐		☐	[ ]	☐	
[-] ESR **		09/06/2023 📅						
Charge Master Events								
85652 - RSH RBC SED RATE, AUTO			☐		☐	[ ]	☐	
Pregnancy test [11, AN]	Yes	[ ] 📅	☐		☐	[ ]	☑	
Infection testing [12]		09/06/2023 📅	☐		☐	[ ]	☐	
ILD biomarkers sampling		[ ] 📅	☐		☐	[ ]	☑	
All AEs/SAEs/ AESIs [16]		09/06/2023 📅	☐		☐	[ ]	☐	
Concomitant therapy		09/06/2023 📅	☐		☐	[ ]	☐	
IRT Call/Notification		09/06/2023 📅	☐		☐	[ ]	☐	
[-] Blood Draw		09/06/2023 📅						

***If the calendar option is available, click on it to see the visit information if updated, you may proceed to review and approve billing charges in CareConnect work queue

***If there's no calendar build, there will be no calendar option to the left column

*** If no calendar build is available, we have to confirm study visit details via email with the study coordinator/s if the service date is study related bill to study or non-study related bill to insurance (ex. NIH)

- o To check who is in the study team: > go to PC console > Go to staff tab > look at the study coordinators with CRA (see image below for reference)

>Open email and use DOMCTP@mednet.ucla.edu to create an inquiry to the study team: see sample format of email below

**Type: Patient name, Service date, IRB# and confirmation if the service expenses should be charged to study or non-study or should be routed to insurance, inquire visit type/# and week #

Hi Team ,

I hope this email find you well
Can you please take a look at the charges and confirm if procedures below are study related bill to research or non-study related bill to insurance?
If study related, what visit was this service date for (ex:Visit 6/ week 24)?
If the split of charges are correct or if charges need to be moved? Please advise. Thank you

Patient :
IRB:
Service Date:

DOM central billing office is approving charges in Care Connect. This request is being sent for those visits in OnCore that have not been updated or do not have a budget calendar build. As a reminder, subject visit details must be entered into OnCore within 24hrs of visit completion. Failure to complete this mandatory workflow process has a direct impact in the timely billing of subject visits. This request to confirm charges are time sensitive.

Your assistance is greatly appreciated. Thank you

Kind regards,

Clinical Trial Program

***Insert a snip-it from CareConnect to the email (see sample below for reference) of the service date for the pt that you are inquiring.

**When the study team confirmed via email if procedures/charges are study related bill to study or non-study related bill to insurance or study related bill to insurance for the service date of the patient

> Go to CareConnect >look for the pt that is confirmed by study team

> Start with the HB account (Pink color)

>Open the charge master file to compare the price listed in CareConnect

>To find the charge master file: Go to mednet.uclahealth.org
>Hover your mouse to Clinical systems > Go to Hospital Research Clinical Trial Pricing>

>Scroll down to the yellow section> click on the most recent date

> A new window will pop out to ask you to log in (log in with you credentials similar to when you log in to your computer)

>An excel file will download: You can see the codes w/ cost from different tabs (see highlighted in yellow)

To compare the HB price with Charge master file

>look at the code from HB account and price

>Go to charge master file> check under procedure tab, lab tab, pro tech split tab where the code is assigned > press CTRL+F > type the code you are looking for> Click Find next

> Compare the listed price (gray) in charge master to the HB account amount on CareConnect
**The HB amount in CareConnect should NOT exceed the amount listed on charge master

**Make sure you are checking the amount column if it's a non-profit or industry sponsor

- If there's a PB account with the same CPT code as the HB account, compute the HB amount on the formula on the excel file formula >type the CPT charge amount from HB account to the excel file column A (see image below) and it will calculate how much the PB charge should be.

Formula reference: Column B: =A2*1.2 (should be the same amount in Charge Master)
Column C: =B2-A2

- HB amount + PB amount should total/match the amount of CPT code in the charge master file
Column B: =A2*1.2   Column C: =B2-A2

 **If the PB charge (only for labs) in CareConnect exceeds the amount in the excel file, then PB charge needs to be Price override/ corrected

>Go to the PB section from care connect > Select the items that need price override

>Click Research correct, a window will pop out

**Select <mark>Yes,</mark> if the study is research related or <mark>No,</mark> if its non-study/ non-research related
>Modifier type: Click the magnifying glass and select priceoverride or code 1000
>Accept

**It will show priceoverride next the amount

>Go back to the <u>HB section</u> >select all >click Mark as reviewed

>A window will pop out   > edit and add service date _____
> type .RSH to look for the appropriate smart text >fill in the information: IRB#, HAR#, Service date, Visit/Cycle, CPT codes
>Click accept

> Click X on top the tab to close or exit
>It will show it has been reviewed with the name of the reviewer , date and time stamp

 **If there are non-study charges attached to the HB research related charges that you are reviewing/approving, you don't need to select the items because it will be automatically confirmed as non-research related by the system.

>Go to the <u>PB section</u> (after price override- if necessary) >select all >click Mark as reviewed
>a window will pop out
> type .RSH to look for the appropriate smart text >fill in the information:
(see sample to follow below)
>type CPT codes= correct PB charge amount (if price override is necessary)
> Type the total amount
> Reason: Override requested due to 20% cloned charge overflow

** If there's a PB charge approved without an override request
> type .RSH to look for the appropriate smart text > fill in the information (see below image for reference)

>Click accept
>It will show it has been reviewed with the name of the reviewer, date and time stamp
> Click X on top the tab to close or exit
>The patient will turn green as completed in the CareConnect Dashboard

>For Non-Study related account
>select all >click Mark as reviewed
>a window will pop out
> edit and add for service date _____
> type .RSH to look for the appropriate smart text >fill in the information needed
>Click accept
>It will show it has been reviewed with the name of the reviewer , date and time stamp
> Click X on top the tab to close or exit
*The patient will turn green as completed in the CareConnect Dashboard

<u>For study related bill to insurance</u>

> Select the charges > click <u>research correct</u> button

> Research related? Click Yes > Modifier Type : Select Routine > Bill to : Select Insurance/Patient

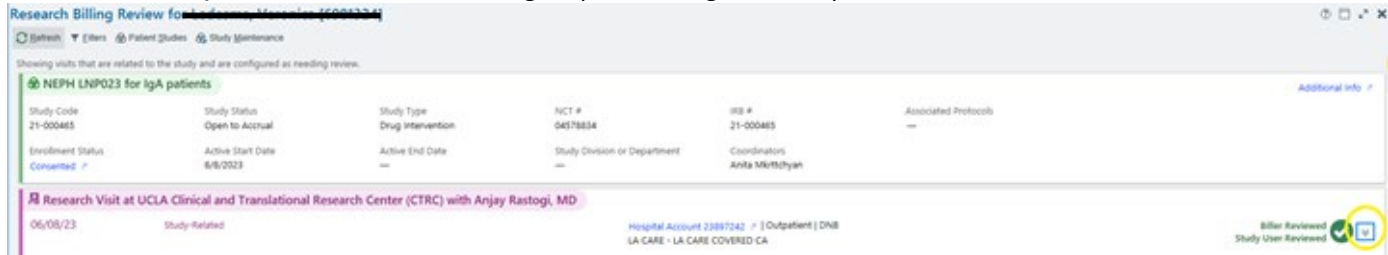** it will show Routine under RSH Modifier

> Click Mark as Reviewed button
> Add the smart text and fill in the required field > Click Accept
*The patient will turn green as completed in the CareConnect dashboard
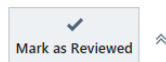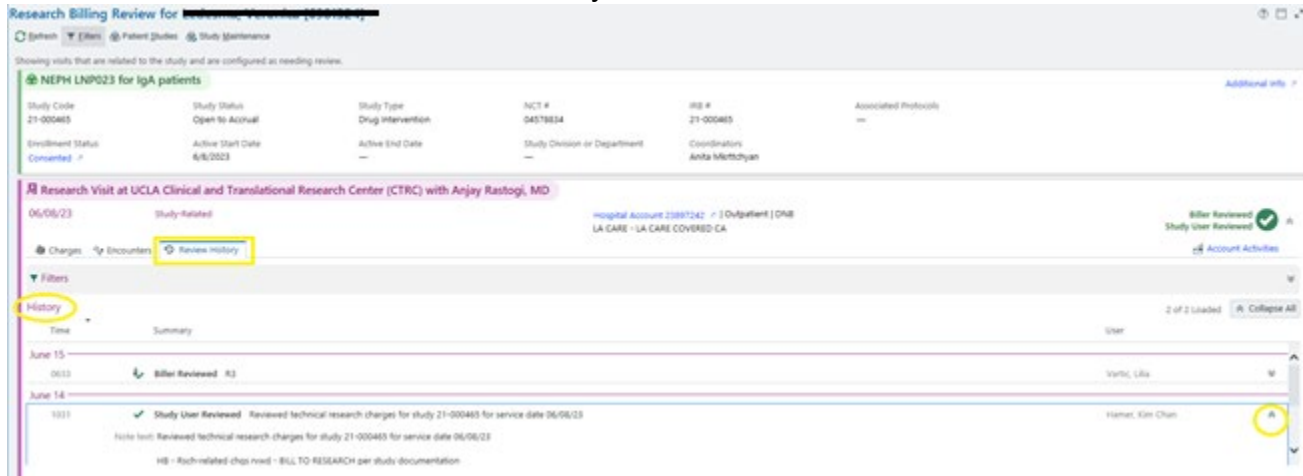
TO REVIEW APPROVED RESEARCH BILLING

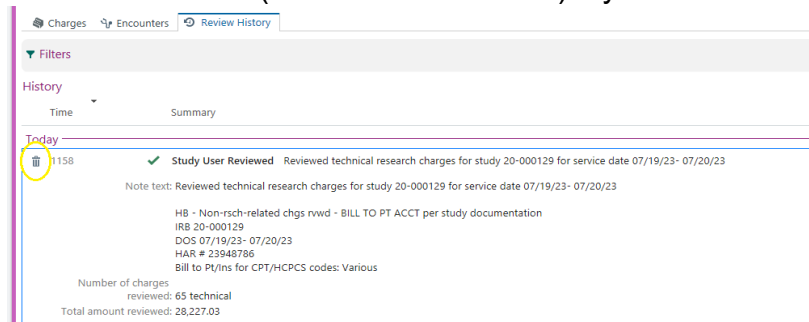>Click the drop-down arrow on the right (See image below)

>Click the Review History tab (see image below)
>Click the Drop Down Arrow on the right (see image below)
**It will show the smart text and how many items have been reviewed

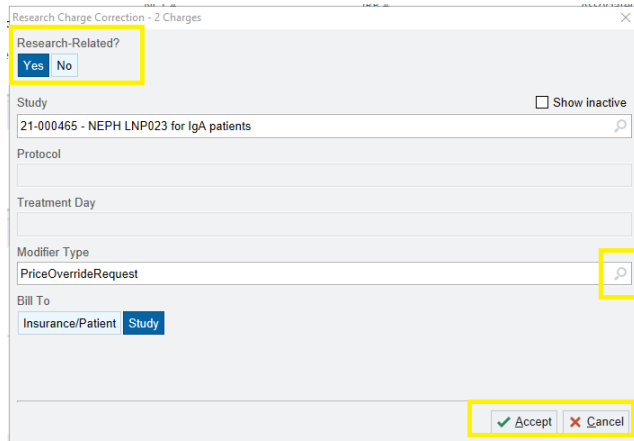>Click the Delete (trash icon on the left) if you need to re-do the review again.

TO REMOVE THE PRICEOVERRIDE

>Go to the HB or PB section in care connect > Select the items you want to remove priceoverride

>Click Research correct, a window will pop out

**Select <mark>Yes</mark>, if its study/ research related or <mark>No</mark>, if its non-study/ non-research related
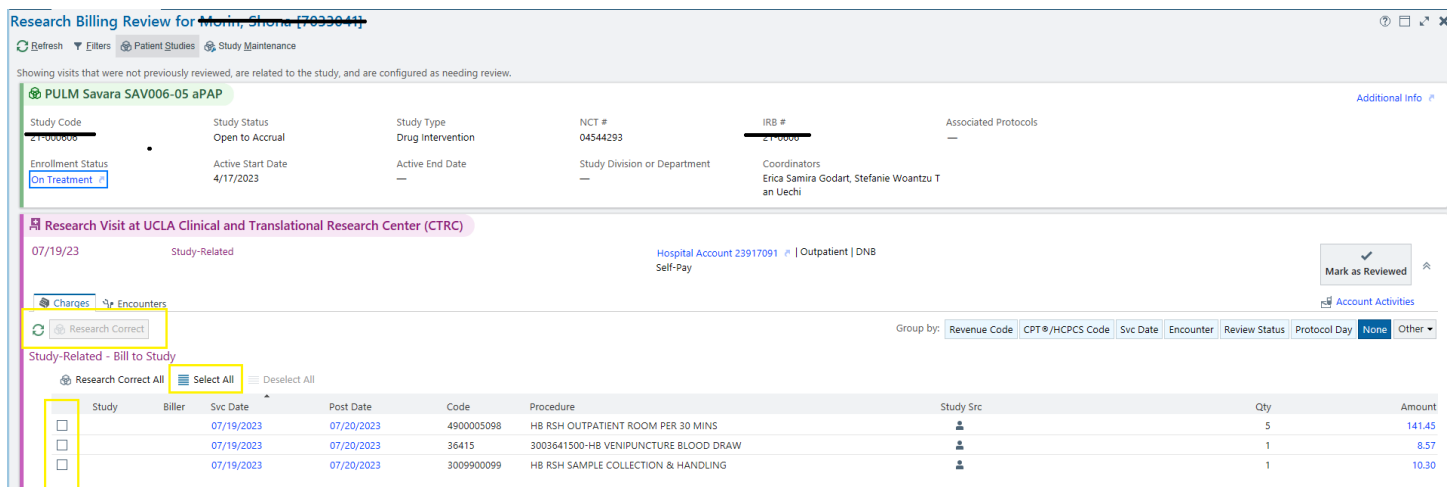
>Modifier type: Delete the Priceoverriderequest > click the magnifying glass
>Accept : the priceoverride will be removed

TO CHANGE ITEMS FROM STUDY RELATED TO NON-STUDY (can be applied to HB and PB)

> Select the items that you want to change
> Click research correct, a window will pop out

>Under Research related: Select No >Accept

**The items will be transferred to Non-Study Charges

**Can also be done to change from Non-study charges to research related using the same steps noted above.

**After research correction, proceed to the normal <u>mark as reviewed</u> process noted above.

- Contacts/ Resources:

  Required training to be completed before access to Oncore/CareConnect:
  ELRSH100, RSCH160, RSCH210, RSCH215
  https://uclahealth.csod.com/samldefault.aspx?returnurl=%252fDeepLink%252fProcessRedirect.aspx%253fmodule%253dloRegisterAndLaunch%2526lo%253d574570e0-a11d-41f1-8577-220553687c49
-
  Tip Sheets- Training Suite (CareConnect/Oncore): https://mednet.uclahealth.org/n6-mednet/9921243361f690d0/uploads/sites/8/fm/training/training-resources/Research/RSH-Training_Suite_ALL-TS.pdf?ts=1683914129

CRBP team email: UCLAHSCRBP@mednet.ucla.edu

Notes:

- Charge Review Best Practices -
  - Concern about incorrect billing and don't know how to proceed, you may send an email to DOMCTP and ask for assistance. In addition, you may request for CRBP to place a freeze on further collections.
  - Things to consider:
    - Check with Study Team to assure Linking of study account/Insurance. "Without linking there will be no trigger for billing review"
    - Reimbursement to patient Insurance/study account may occur.
    - Have study team confirm with patient once billing is corrected.

Contact & Resources:

- UCLA HS CRBP Team: UCLAHSCRBP@mednet.ucla.edu
- CareConnect/ ResearchConnect Access and Training
  Please click the following link to access the UCLA CareConnect Training Website and ResearchConnect Training
  Materials: Tips and eLearning.
- Call Customer Care! 310-267-CARE (2273).
  Specialists are available 24/7 to provide support.