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Automating Research Billing Procedures

Research Approval Workflow
EPIC Optimization

Presented by

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Topics

- Epic Modules
- Clinical Research Workflow Overview
- Subject Enrollment Process
- Linking Encounters to a Research Study
  - Encounters and Transactions
  - Automated linking for procedures in a linked encounter
- Research Approval Workflow Optimization
- Research Workqueue Training

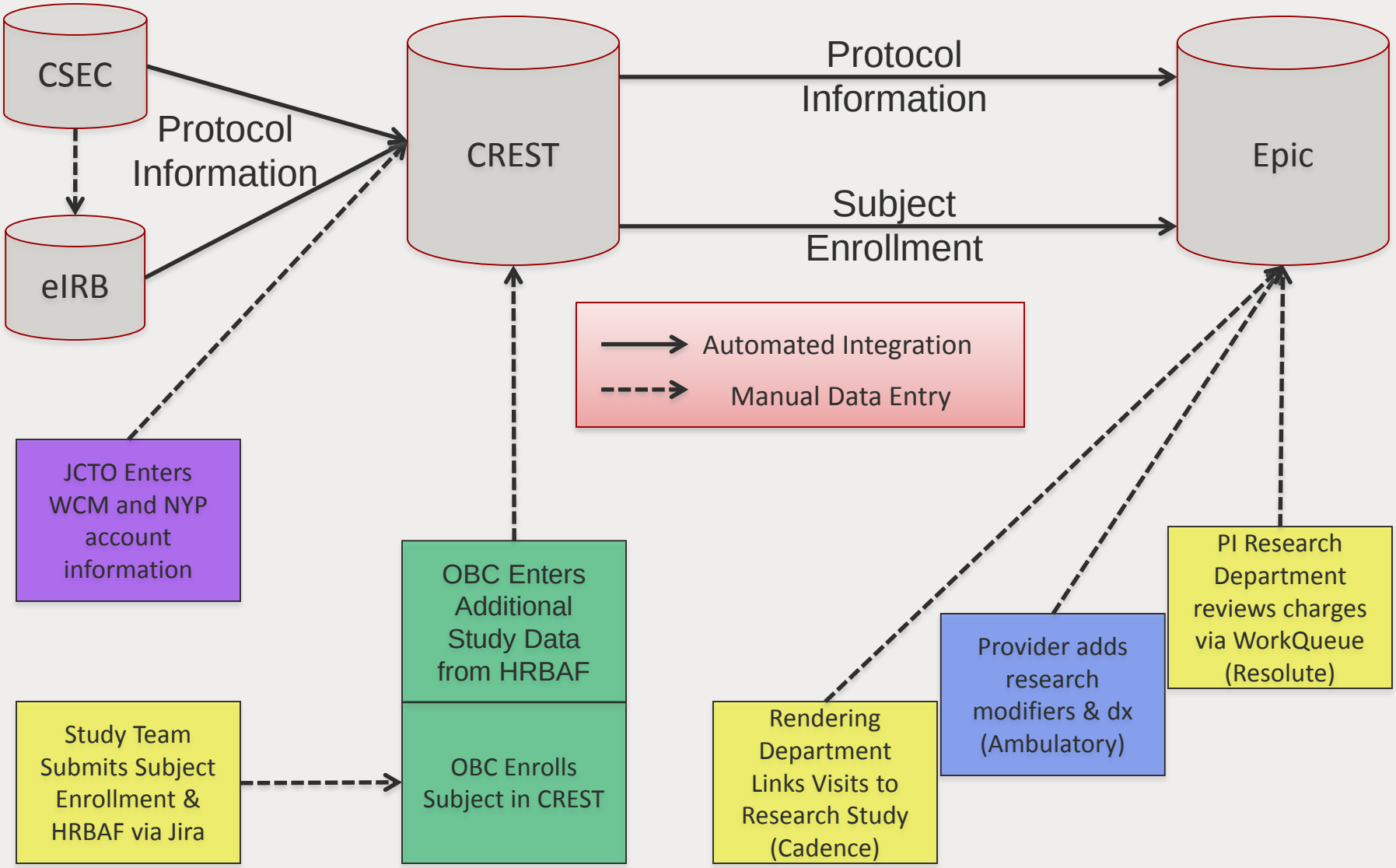
Epic System Modules

Epic Cadence is the scheduling module for outpatient clinics.

EpicCare Ambulatory is one of the main and largest components of EpicCare. Clinicians can document visits, place orders, view results, etc.

Epic Resolute is the billing and financial tracking system.

Clinical Research Workflow Diagram



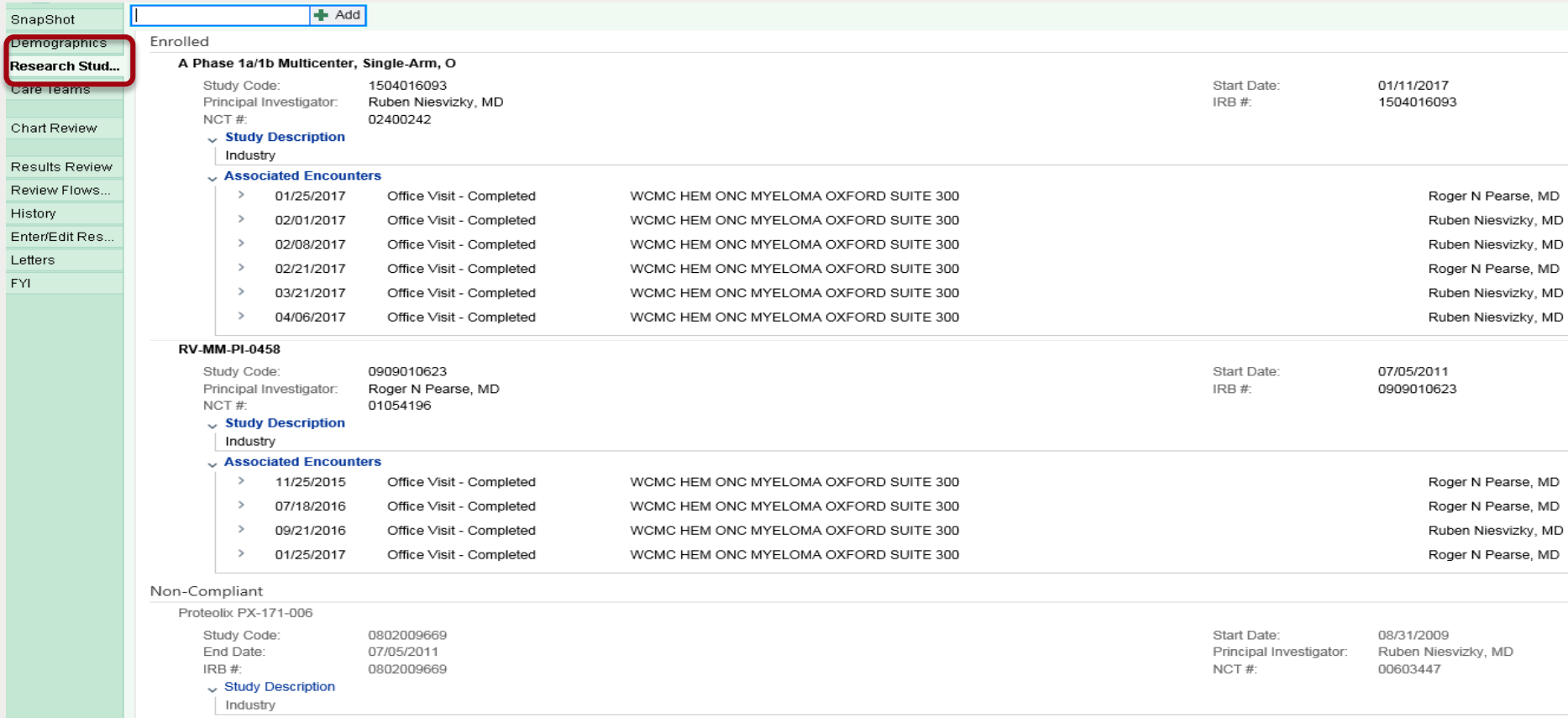
Subject Enrollment Process

- Patient is identified as a potential research subject.
- Subject provides informed consent.
- Study team submits the informed consent form and HRBAF to the Office of Billing Compliance (OBC) via the Jira ticketing system.
- OBC team creates an enrollment record for the subject in **C**linical **R**esearch **E**nrollment & **S**ubject **T**racking (CREST) system.
- Once enrolled, CREST sends the study information to the subject's Epic record.
  - Only studies with billable risks will flow over to Epic.
  - Study information is found in the Research Studies Activity.

Research Studies Activity

In this activity you can see information about both active and historical study information. The information includes:

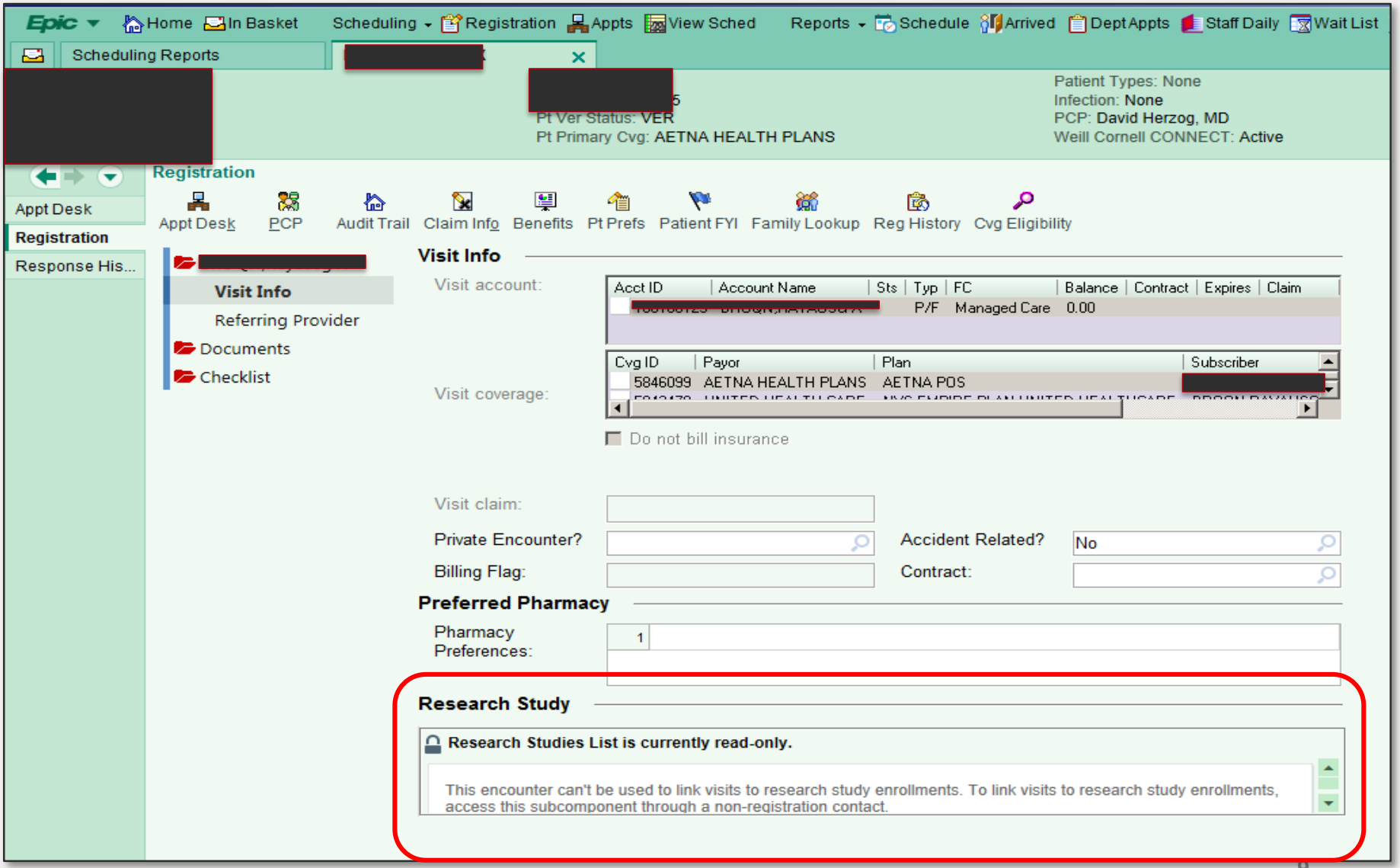
- **Study Name**
- **IRB number**
- **Principal Investigator**
- **NCT number**
- **Start Date (enrollment date)**
- **End Date (if applicable)**
- **Off Study Reason**
- **Study Description (Sponsor Type)**



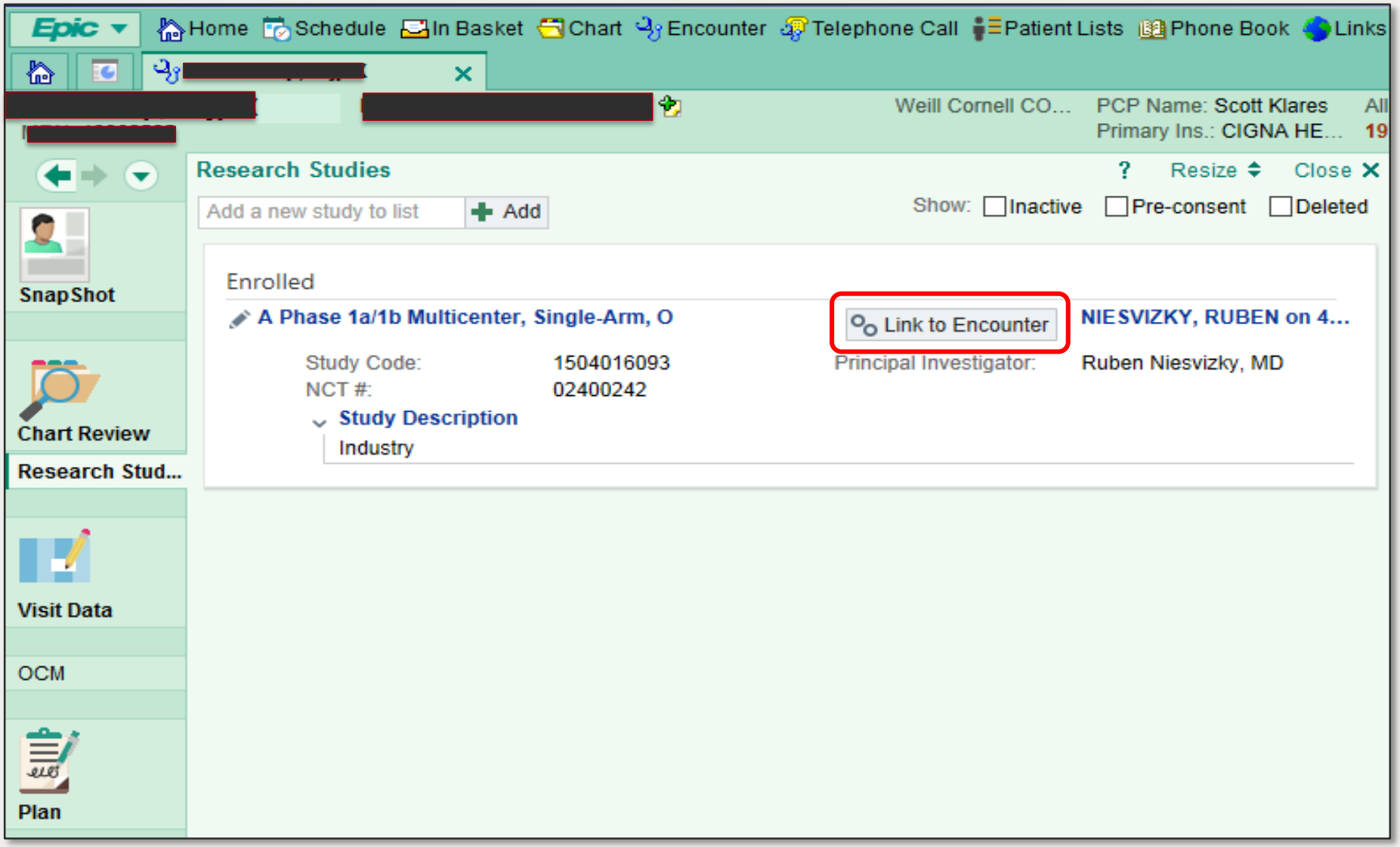
Linking to a Research Study

- All study related visits and procedures must be linked to the research study in Epic.
- Linking can be done by a scheduler or a provider.
- For visits within the PI department, the Study Team should work with the schedulers to notify them when a visit should be linked to the study.
- For visits outside the PI department, the order (paper or electronic) must include the IRB number. If the procedure is billable to the study, then the study account number (or grant number) must also be included. This information can be provided by the Study Team.
- For screening visits, providers must keep the encounter open until the subject is enrolled with OBC. The screening visit must be linked to the study before closing the encounter.

Scheduler's View in Cadence



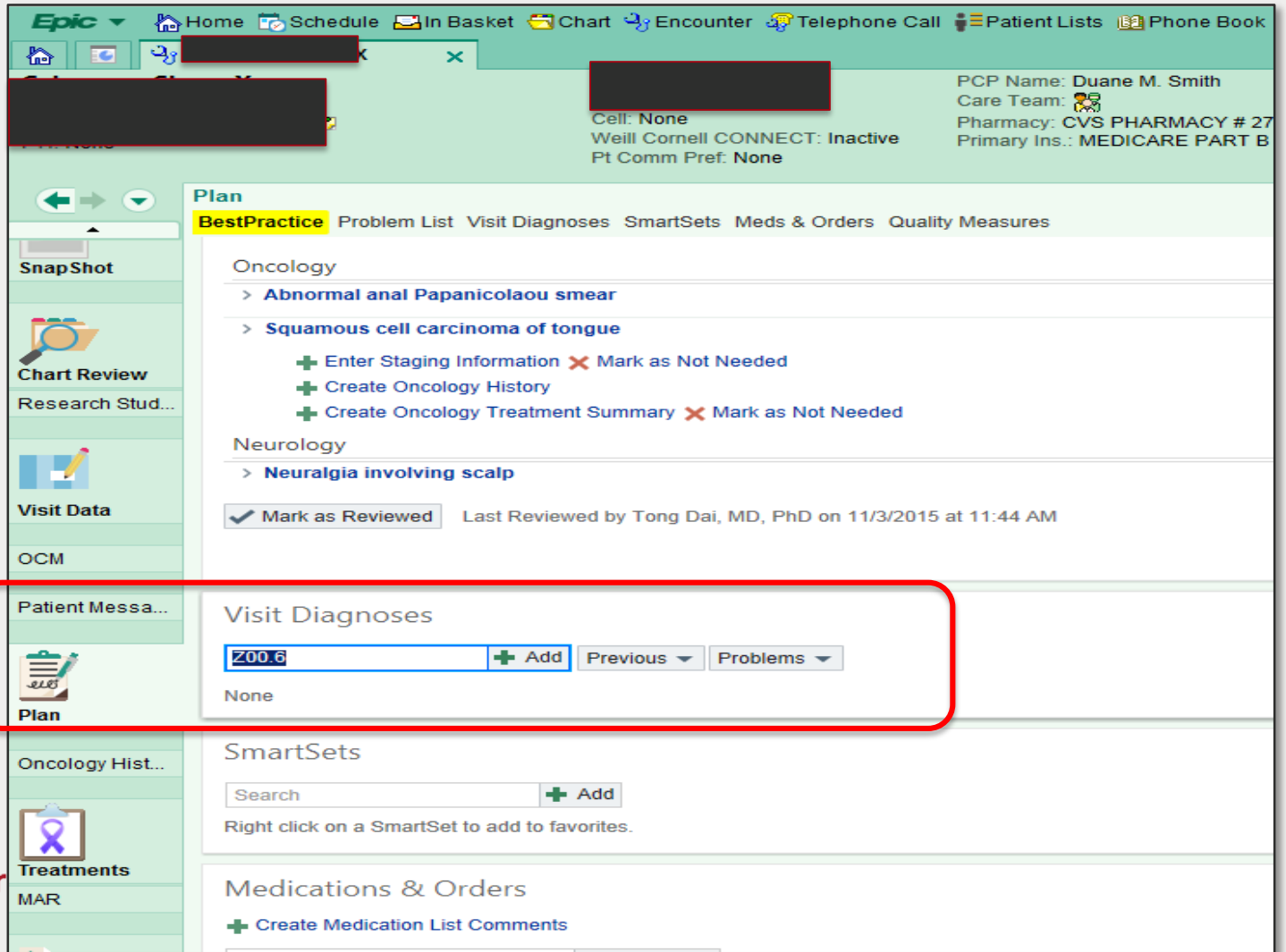
Provider's View in Ambulatory



Z00.6 Diagnosis Code

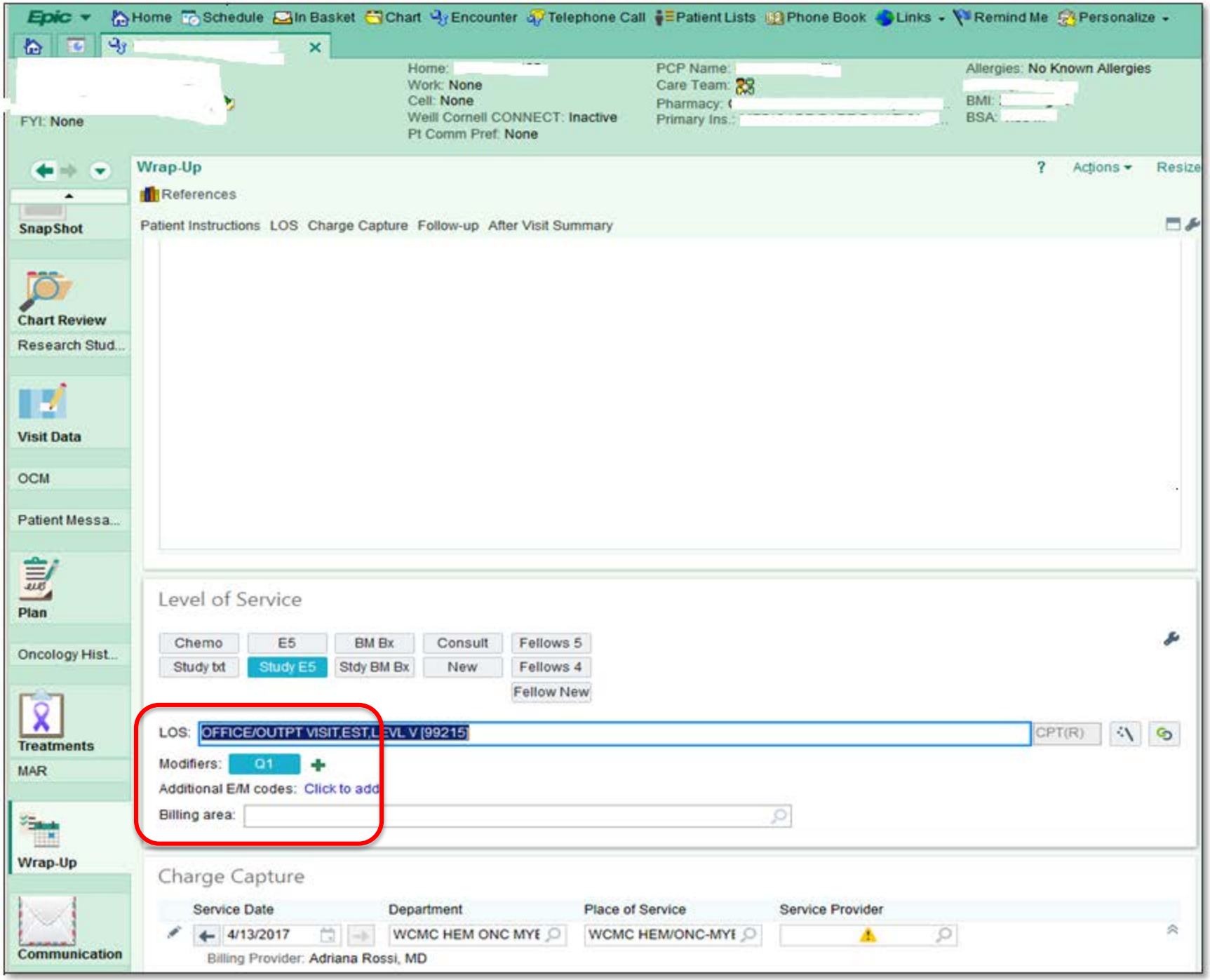
With the release of ICD-10, the new diagnosis code is **Z00.6** (previously V70.7).

Z00.6 = Encounter for examination for normal comparison and control in clinical research program



Adding Research Modifiers and Validations

- Provider must add research modifiers before closing the encounter
- Q0 - Investigational clinical service provided in a clinical research study that is in an approved clinical research study.
- Q1 – Routine clinical service provided in a clinical research study that is in an approved clinical research study.
- BG – “Bill Grant” -- Any procedure that is research specific and billable to the study


Epic
Home
Schedule
In Basket
Chart
Encounter
Telephone Call
Patient Lists
Phone Book
Links
Remind Me
Personalize
Home:
Work: None
Cell: None
Weill Cornell CONNECT: Inactive
Pt Comm Pref: None
PCP Name:
Care Team:
Pharmacy:
Primary Ins.:
Allergies: No Known Allergies
BMI:
BSA:
FYI: None
Wrap-Up
Actions
Resize
References
Patient Instructions
LOS
Charge Capture
Follow-up
After Visit Summary
SnapShot
Chart Review
Research Stud...
Visit Data
OCM
Patient Messa...
Plan
Oncology Hist...
Treatments
MAR
Wrap-Up
Communication
Level of Service
Chemo
E5
BM Bx
Consult
Fellows 5
Study txt
Study E5
Stdy BM Bx
New
Fellows 4
Fellow New
LOS:
OFFICE/OUTPT VISIT,EST,LEVL V [99215]
CPT(R)
Modifiers:
Q1
Additional E/M codes:
Click to add
Billing area:
Charge Capture
Service Date
Department
Place of Service
Service Provider
4/13/2017
WCMC HEM ONC MYE
WCMC HEM/ONC-MYE
Billing Provider: Adriana Rossi, MD

Close Visit Validation

When a provider closes an encounter in Epic that is “linked” to a research study, the system checks for the appropriate modifier and/or diagnosis code. Either of the following are required to close the encounter:

- **Q0 or Q1 modifier AND Z00.6 diagnosis code**

OR

- **BG modifier (Z00.6 diagnosis code not required)**

Research Workqueues

- Research charges that are linked to a study, have the Z00.6 diagnosis code, and research modifier are routed to a Research Workqueue (WQ) in Epic.

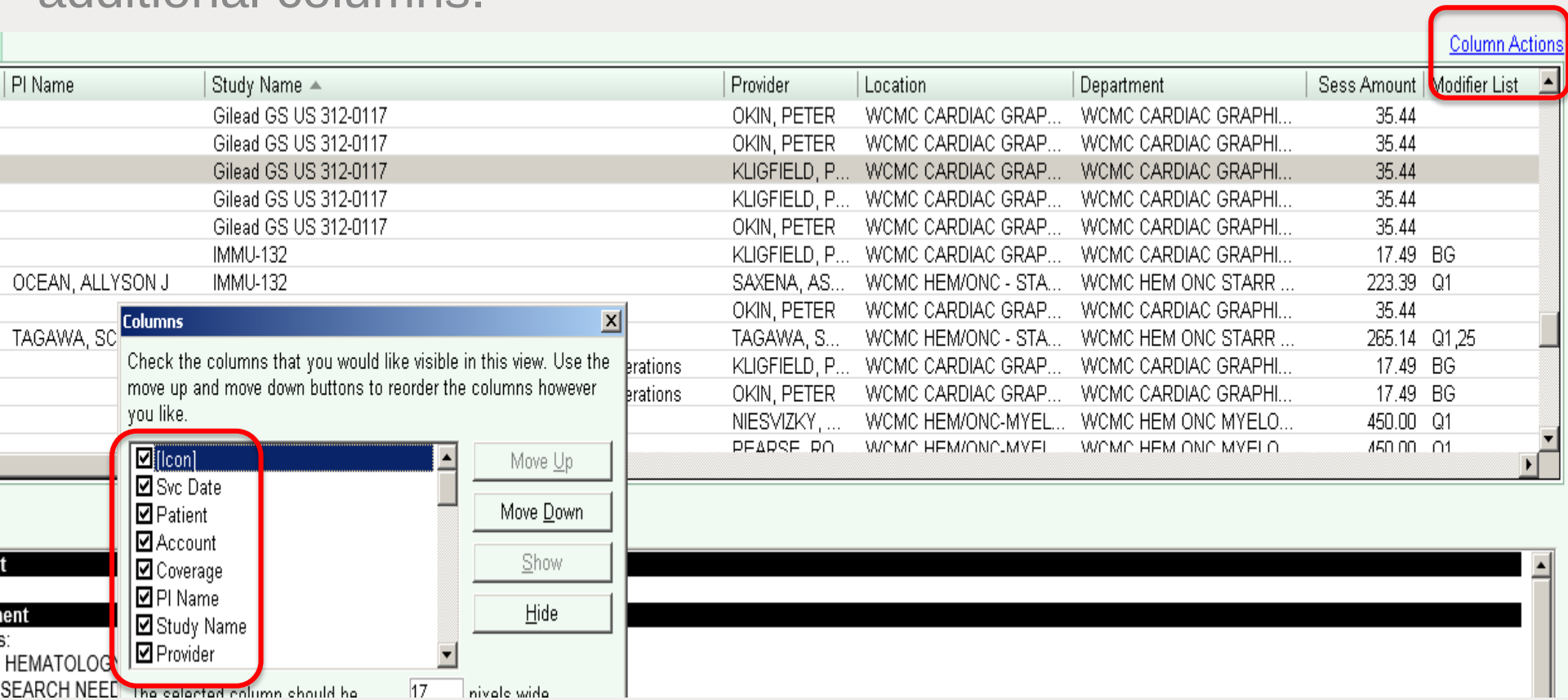
- Charges are routed to the PI's academic department WQ.

  - Example – If an Echocardiogram is scheduled as part of an oncology trial, Cardiology will link the Echo and add the Q1/BG modifier. The charge will appear in the Hematology Oncology Research Workqueue to be reviewed.

- All clinical departments have a WCM WQ and a WCINYP WQ.

Displaying Study Columns in the WQ

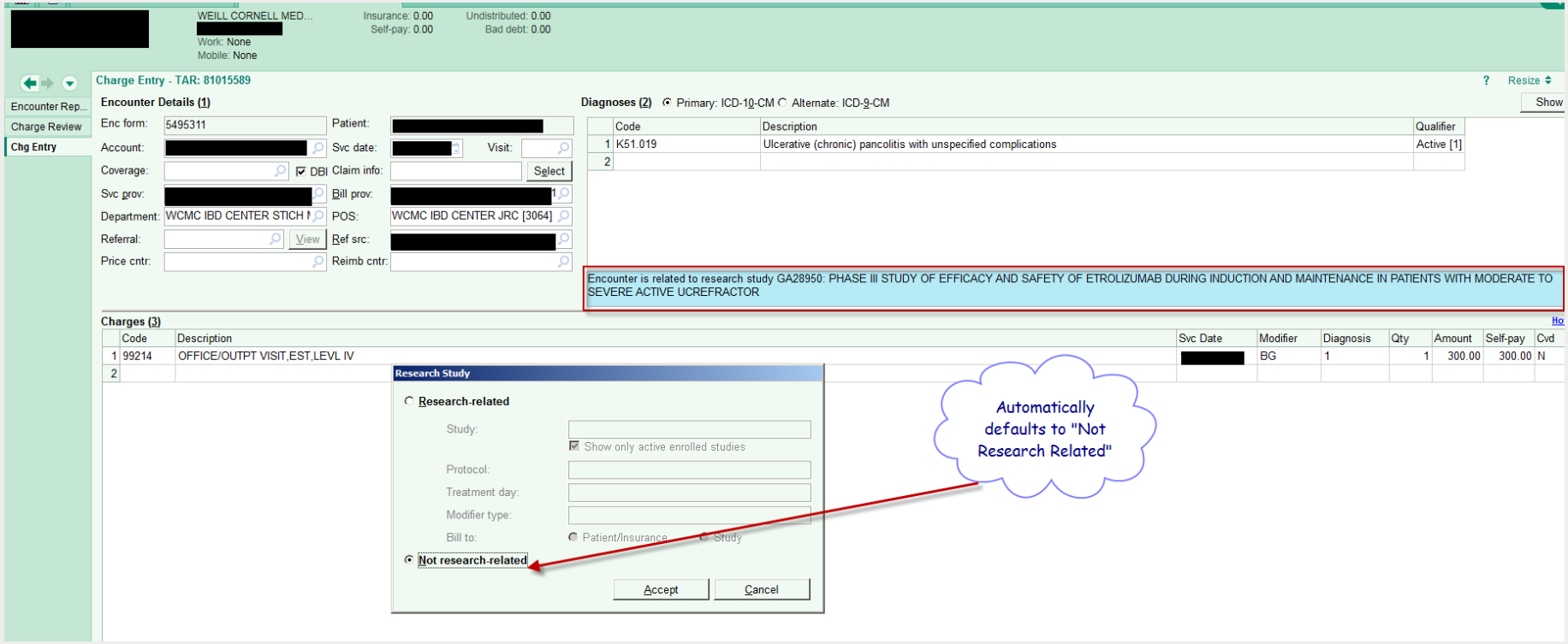
Default WQ view does not display PI Name or Study Name
To add these columns, click “Column Actions” and select the additional columns.



Research Encounter Linkage Modification

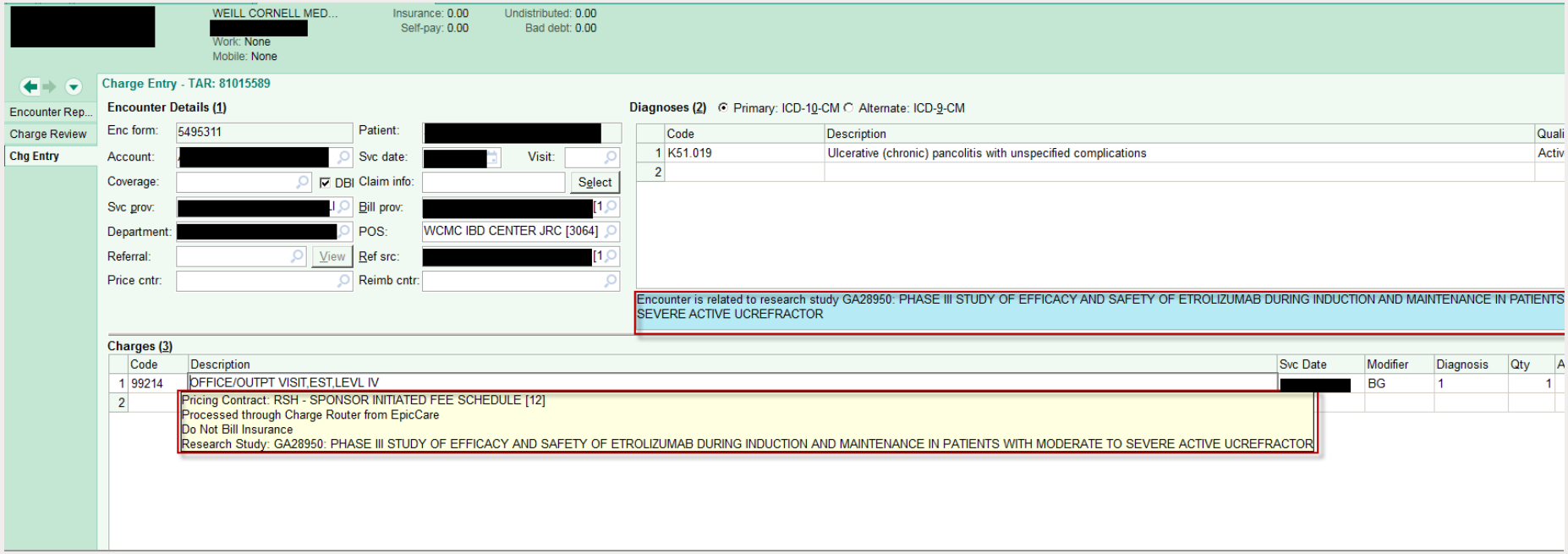
- Encounters may contain multiple procedures (CPT codes)
- Currently when an encounter is “linked,” not all of the procedures are “linked.”
- Each CPT code **within** a charge session/encounter needs to be assigned one of the following statuses:
    a. Bill to the Study (BG)
    b. Standard of Care (Q1 or Q0)
    c. Not Research Related (NONRES)
- Modification live in EPIC April 21, 2017

Research Encounter Linkage Prior to Modification



Research Linkage After Modification

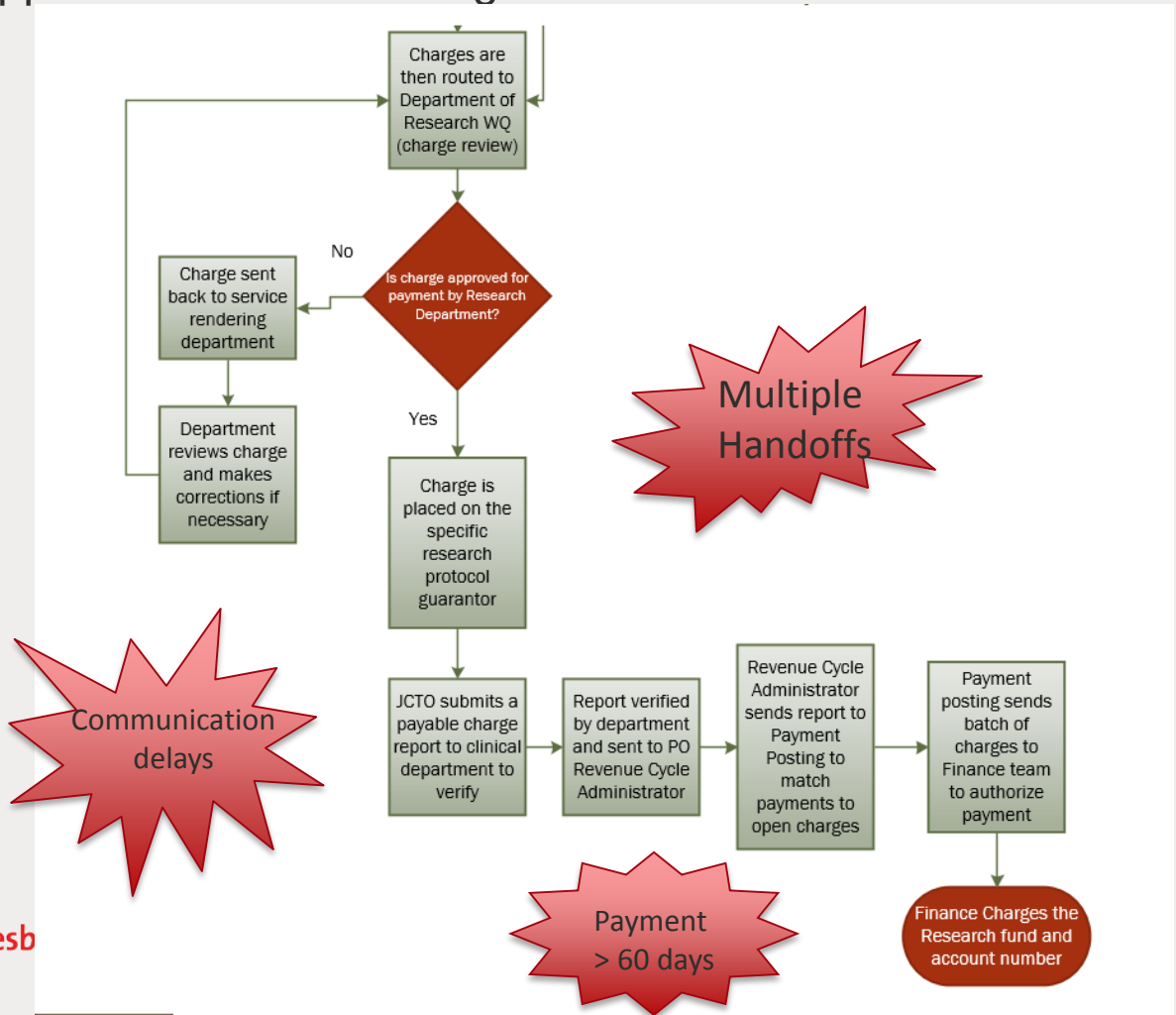
- Transaction will automatically be linked based on the associated encounter linkage



Research Approval Workflow Optimization

- In June 2017 EPIC will be updated to automate the process of applying payment to approved research charges.

Current State:

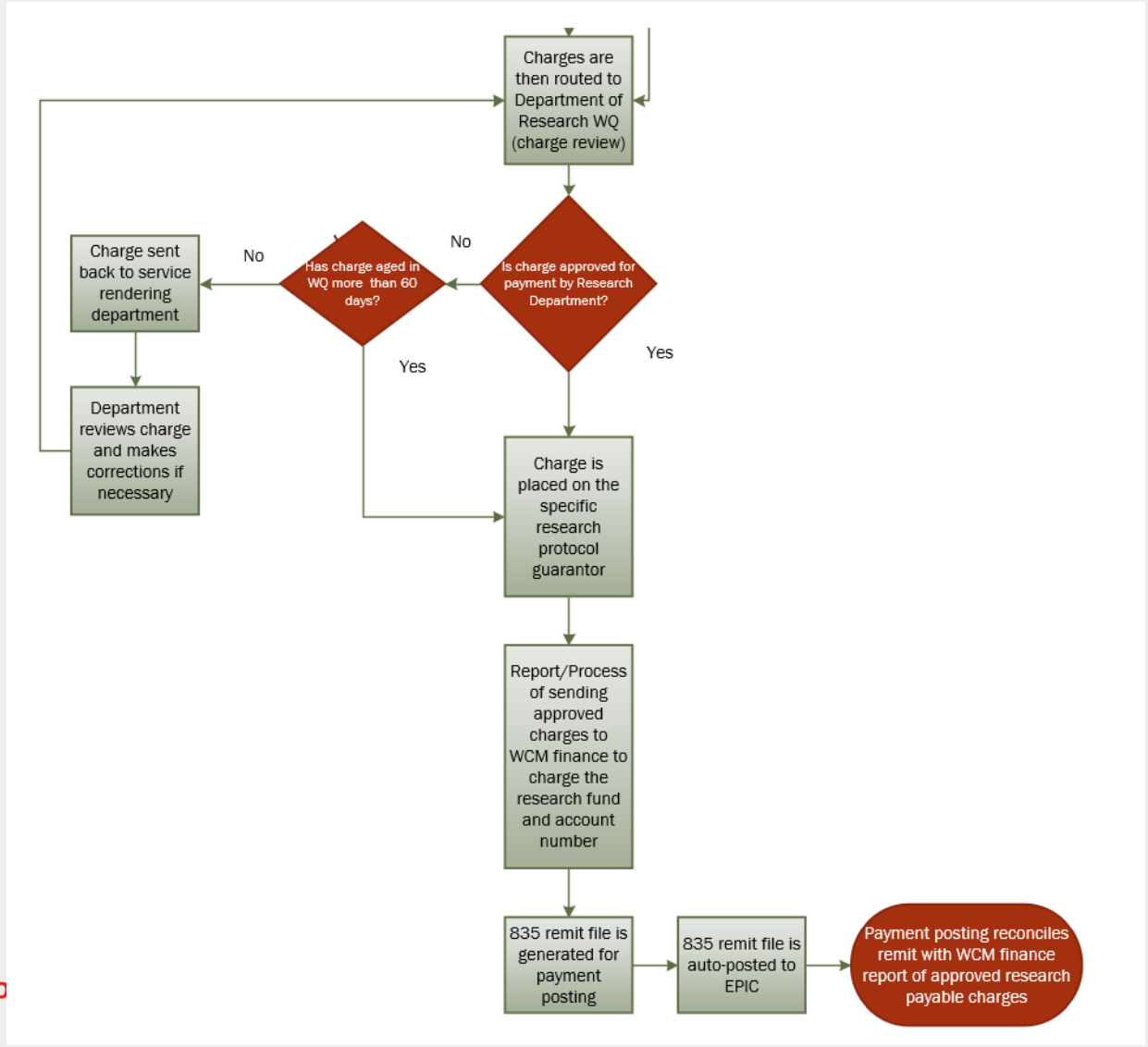


Research Approval Workflow Optimization

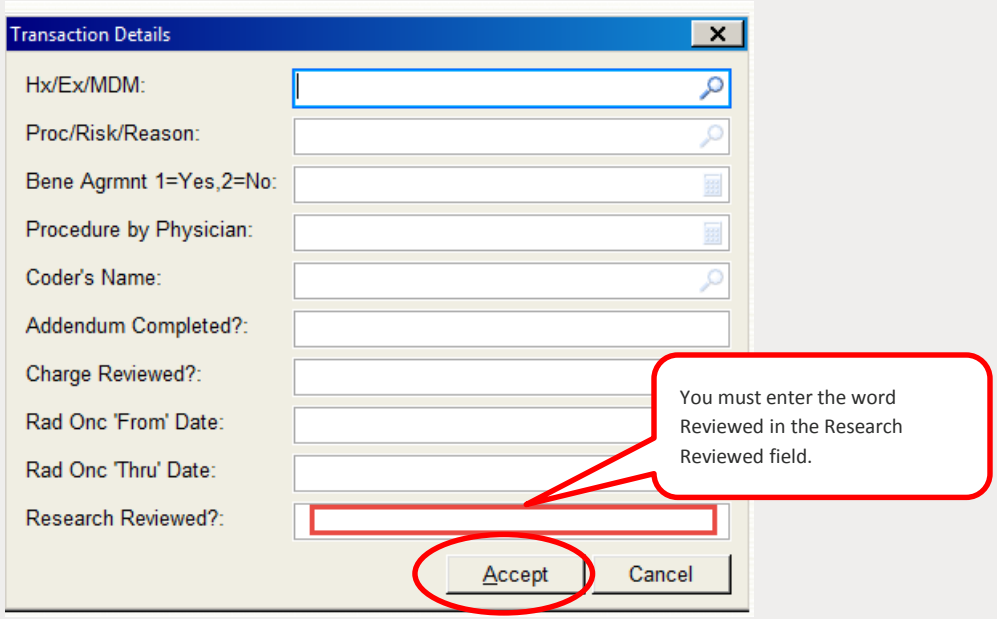
Future State:

Goals:

- Reduce handoffs
- Streamline communication
- Timely Payment of Research Charges
- Elimination of numerous excel spreadsheets



Research Approval Workflow Optimization



When a research charge is marked as “reviewed”, it is authorized to be paid.

Research Fee Schedule Updates

- On April 19, 2017 the research fee schedule was updated to generate fees based on location.
- Prior to update, only office based fees were generating for services performed, impacting departments that performed services in the inpatient setting.
- PI Research Departments no longer have to update fees to the correct amount if services are performed in the inpatient setting. EPIC will automatically default to correct fee based on location.

Research Approval Workflow Optimization

Key Points:

- The research fee schedule will now populate fees based on location (inpatient vs. outpatient)
- PI Research Departments must update charges that are billed as “standard of care” – auto-linking of encounters will link all associated transactions as study.
- When a research charge is marked as “reviewed”, it is authorized to be paid.

Access to Research Workqueues

Training is required before issuing access to the Research WQs.

“Research – Charge Review WQ” training can be scheduled on the Epic Training Signup SharePoint site.

Upcoming training sessions:

Class Type : Research - Charge Review WQ (3)

Research - Charge Review WQ	4/28/2017	1:00 PM to 4:00 PM	Oz Training Room	14	Sign up for Training
Research - Charge Review WQ	5/5/2017	1:00 PM to 5:00 PM	Oz Training Room	16	Sign up for Training
Research - Charge Review WQ	6/2/2017	1:00 PM to 4:00 PM	Oz Training Room	16	Sign up for Training

FAQs

- **Who should manage the charges in the Research WQ?**

➢ The people managing the research WQ should be familiar with the study procedures, budget and HRBAF. Departments determine access to these workqueues

FAQs

- **Which study account will be charged for the research procedures?**

➢ For industry funded clinical trials, the study accounts created by the JCTO are pushed into CREST and Epic. For federally funded and department funded studies, the accounts are requested from the departments and manually entered into CREST.

FAQs

- **Can a visit be linked after the encounter is closed?**

➢ If a charge is in EPIC without a link to a study or missing research modifiers, the charge can be corrected using the "research correct" function in transaction inquiry. Details are in the research-charge review WQ job aide.

FAQs

- **Who do I contact with WQ errors?**

➢ Contact support@med.cornell.edu

FAQs

- **What is the expected turnaround time for subject enrollments to be processed by OBC?**

➢ In general, OBC closes tickets within 24 hours of receipt. If an enrollment requires immediate processing, please contact OBC directly.

FAQs

- **What if the charge fee differs from what was budgeted?**

➢ The fee schedule should be utilized when negotiating budgets.

Questions?

TOPIC	OFFICE TO CONTACT	CONTACT INFORMATION
Epic	Physician Org Helpdesk	support@med.cornell.edu
OBC – Jira	Office of Billing Compliance	Doret Debarros dod2010@med.cornell.edu
Clinical Trial Operations	JCTO	JCTOoperations@med.cornell.edu
Research Workqueue	Physician Organization	support@med.cornell.edu