User Guide

Work Queue Management for Research Related Professional Charges

The Office of Clinical Research (Previously the Office of Human Research)
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Background

Research Charge Router Charge Review Work Queues are centralized environments in the Epic System that hold all charges which have been “flagged” as being research related until research staff can review and process the charge. These work queues capture professional charges only. Charges that are triggered from EpicCare (EMR) will not be routed to the appropriate Work Queue until after the EpicCare encounter has been closed. Clinical Research Coordinators and Research Staff should know which charges should be billed to their research grant and which charges should be billed to insurance by way of the prospective reimbursement analysis process.

There are (2) Research Work Queues in Epic which need to be managed by research staff once per week (minimum):

1. Department Work Queue
2. Personal Family (P/F) Work Queue

The timeliness of charge processing is crucial. If research staff is unable to process the charge, it must be transferred to the procedure/service charging department via the Research Resolution Work Queue for processing. Each CPUP and CCA practice has a Research Resolution Work Queue. It is the responsibility of the departmental biller to manage this work queue.

Access to Work Queues

All research related work queues can be accessed via the main Epic button. Scroll to Billing then to Work queues. The WQs can be found in the last tab entitled Router Review.

Departmental Work Queues

All CPUP and CCA practices have their own Departmental WQ which is listed in ascending order by departmental ORG ID and name of the department. All the charges for that department will be listed in the work queue. To find your study participant’s charges, you can filter/ sort by selecting the Blue Hyperlink Customize Columns, followed by Columns. Check the Box next to the Column Description you want visible in the view. Use the Move Up and Move Down buttons to reorder the columns horizontally. Click the Accept Button to save your preferences.

- Charges are routed to this Work Queue because the guarantor on the charge is a Research Guarantor
- These charges could be from your department/specialty or another department/specialty
- Charges are processed in the WQ by taking the following actions:
  - If the charge is part of the study and should be billed to the research study (RBN):
    - Verify that the correct research guarantor has been selected
    - Verify that the V70.7 is NOT on the charge session
    - Resubmit
If the charge is part of the study but should be billed to insurance:

- Change the guarantor on the charge from the research guarantor to P/F
- Ensure there is a V70.7 (but not in the primary position) associated with the charge
- Resubmit

If the charge is not a research related:

- Correct the charge by either changing the research guarantor to P/F and ensuring there is not a V70.7

**Note:** After highlighting the charge, a comment can be placed in the “User Comment Area” under the “Additional Charge Info” tab. This comment will stay with the charge and route to the Professional Billing group who performs their review (See screen shot below).
- Resubmit – the charge will now process as if it never had a research association. You are not approving anything (ie: ICD-9 code) associated with the charge, but only indicating that it is not research related.

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**Personal /Family (P/F) Work Queue**

All charges for all departments that are intended to be billed to third party insurance are found in this work queue which is numbered #3438. To find your study’s charges, you can filter/ sort by selecting the Blue Hyperlink Customize Columns, followed by Columns. Check the Box next to the Column entitled Research Study Linked to Visit. Use the Move Up button to reorder this Column until it reaches the top of the list. Click the Accept Button to save your preferences.
Charges are routed to this Work Queue because the guarantor on the charge is P/F, the V70.7 diagnosis code is on the charge and/or the research study enrollment checkbox has been checked.

These charges could be from your department/specialty or another department/specialty.

To process the charges through the P/F WQ, you should take the following actions:

- If the charge is part of the study **and should be billed to insurance:**
  - Ensure there is a v70.7 (not in the primary position) associated with the charge
  - Resubmit

- If the charge is part of the study **but should be billed to the research grant:**
  - Change the guarantor on the charge from P/F to the correct research guarantor
  - Ensure there is not a V70.7 associated with the charge
  - Resubmit

- If the charge is **not a research related:**
  - Ensure the charges has the P/F Guarantor and does NOT have a v70.7
  - **Note:** After highlighting the charge a comment can be placed in the “User Comment Area” under the “Additional Charge Info” tab. This comment will stay with the charge and route to the Professional Billing group who performs their review (See screen shot below).
  - Resubmit – the charge will now process as if it never had a research association. You are not approving anything (ie: ICD-9 code) associated with the charge, but only indicating that it is not research related.
How to Process a Charge

It is the responsibility of research staff to review and process their charges on a weekly basis. What needs to be reviewed?

- Is this my research participant?
- Is this the correct test/procedure on this date of service?
- Is the guarantor account on the charge correct? (Research or Personal Family P/F)
- Is the primary diagnosis code present?
- Is the v70.7 diagnosis code* present, and in the second or later position?

*V70.7 diagnosis code must be present if test/procedure is a research related standard of care test/procedure. It must not be in the primary diagnosis position.

Research Resolution Work Queue

If research staff is unable to process the charge for any reason, it must be transferred to the procedure/service charging department via the Research Resolution Work Queue for processing. Each CPUP and CCA practices have a Research Resolution Work Queue. It is the responsibility of the departmental biller to manage this work queue.
Reasons for charge transfer:
- The primary diagnosis code missing on order or visit
- Not the correct study subject
- V70.7 on charge is incorrect, and research staff is unsure if it should be present or not.
- Correct Subject/patient, not correct guarantor, and research staff does not feel comfortable switching the guarantor.

How to transfer a Charge

**IMPORTANT**: It is important to include a specific message that informs the charging department’s billing staff as to the reason you are transferring the charge, and what to do. For example, “Please add the missing primary diagnosis code”, or “This is my study participant; however, this is not a study related procedure, v70.7 should be removed”.

Open up the charge session

![Charge Transfer Example](image)

In this example the Diagnosis code is missing. Click Accept – you will see a Validation Message stating: “Missing DX/Diagnosis not Associated”.

![Validation Message](image)
Click Accept and you will now be able to enter your comment. After entering your comment Click Accept – DO NOT click on Resubmit this Session.

This will return you to your work queue. The Charge Session will be highlighted and the comment will appear in the History Section.

Click Transfer and select the correct Research Resolution Work Queue.
Click Accept and the charge session will be transferred to the Research Resolution Work Queue.

**IMPORTANT:** If you change the guarantor on the charge, and the professional charge has a corresponding technical charge, UPHS Patient Accounting will be notified automatically to change the guarantor on the technical charge. However, if the test/procedure has a professional and technical charge with different guarantors, it is the responsibility of the research coordinator to notify UPHS Patient Accounting department directly.

Any questions, please contact the Office of Clinical Research (previously the Office of Human Research) at (215) 746-7400 or ohr@mail.med.upenn.edu