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Research Billing Buzz

A Newsletter from the Office of Clinical Research Billing Compliance

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Epic Scheduling and Registration

For many legal, liability, and financial reasons, it is important to register research participants in Epic, even if your study does not have billable

services. Just imagine these scenarios: a patient coming into the Emergency Department and telling the attending that he had a research visit earlier that day. What would the provider do if there were no trace of the patient ever being in our Institutions that day? Or, if a patient had a research blood draw for banking, felt dizzy and fell in the hallway. How would anyone know where the patient was seen and for what reason?

As a study team member, you might not have access to scheduling and registration in Epic, thus, feel free to forward this edition of the *Research Billing Buzz* to others as applicable.



The JHM Policy

Institutional policy [PASADT001](#) titled *Inpatient and Outpatient Registration*, states that "All Johns Hopkins entities shall ensure registration/check-in processes are completed prior to or at the time of service..."

Furthermore, the policy makes it clear that is applicable to research subjects/participants:

“II.B. All Johns Hopkins affiliates shall evaluate their inpatient and outpatient operations and procedures to ensure consistent approaches to the procedures outlined in section V of this policy are in place. To the extent applicable these guidelines and procedures shall be in place in all inpatient and outpatient settings, including emergency departments, for all patients, including clinical research participants.”

Use Approved Workflows to Schedule & Register Research Participants

Scheduling and registration staff receive training on the proper way to link an encounter to a research study. Please note that we do not use a “guarantor/insurance” to direct charges to a research account; all research participants should be registered with their insurance information. You can access this [Tip Sheet](#) of FAQs about Scheduling for Research for more information.

In the screenshot below, the field highlighted in yellow shows the appropriate

way to link an encounter to a research study at registration. This field contains all studies that the participant is active on, make sure to scroll down to see the complete list. Note that all the studies will start with the letters "CRMS".

The field highlighted in purple must not be used for research studies.

The screenshot shows a software interface for registration. The top navigation bar includes 'Appt Desk', 'Registration', and 'Research Studies'. The 'Research Studies' tab is active. Below the navigation bar, there are several icons for different functions: Screening, Appt Desk, PCP, Audit Trail, Claim Info, MSPQ, Referrals, Benefits, PT Prefs, View MSPQ, Patient FYI, Family Lookup, and Reg HI. The main content area is divided into sections. The 'Research Study' section is highlighted in yellow and contains a message: 'There are no active research study enrollments you are authorized to link to this encounter.' Below this is the 'Bundled Payments' section, which is also highlighted in yellow and contains a message: 'There are no eligible bundled episodes that can be linked to this encounter.' The 'Financial Info' section is highlighted in purple and contains several input fields: 'Medicaid number:', 'Transplant Review:', 'SNF Facility Name:', 'Ambulance run #:', 'Specialty billing:', and 'CORF On or Off Site:'. The 'Specialty billing:' field is highlighted in purple. At the bottom, there are navigation buttons: 'Restore', 'Back', and 'Next'.

Charges for research participants will undergo a pre-bill review by the office of Clinical Research Billing Compliance (CRBC). It is important to link the orders and encounters to the correct study for the DOS.

"Do Not Bill Insurance"

For various reasons, patients with insurance may make a request to not bill their insurance. In essence, the patient is requesting to be Voluntary Self-Pay. When a patient requests to be voluntary self-pay, end-users must click the [Do not bill insurance](#) checkbox to prevent a claim from going to the payer. In not doing so, the end-user may violate the patient's privacy rights which could present a liability for the organization.

NEVER use "Do not bill insurance" for research visits. This will result in the participant receiving a bill 100% of the time. Please make sure that research participants do not select that option when checking-in using a kiosk or MyChart.

Patients on My Studies Report

It is essential for the research workflow that all research-related encounters be linked to their research study to ensure patients are not being billed for services that should be billed to the study. This [Tip Sheet](#) will help you take advantage of the Patients on My Studies – Scheduled Appointments or Future Hospital Encounters reports. These reports allow study teams to review upcoming appointments for your research participants and link research-related encounters directly from the report.

You can find tip sheets and more information using the links on the Research Dashboard in Epic or by clicking on the *Epic button >> Help >> Epic Tips and Tricks*

We recommend reviewing the [Epic Patient Access Training Portal](#) for the most up to date information regarding any additional questions about registration and scheduling. The Epic Patient Access Training Team can be contacted directly by emailing PatientAccessTrain@jh.edu

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