Clinical Research Billing Update

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**March 16, 2021**

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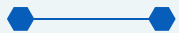
Meeting Objectives

○ **Develop shared understanding of the clinical research billing project**

○ **Identify upcoming changes for the charge review process**

○ **Identify action required by research teams to adopt the new process**

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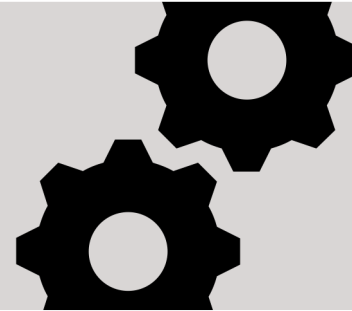UNIVERSITY OF WISCONSIN–MADISON

Clinical Trials
Strategies for Success
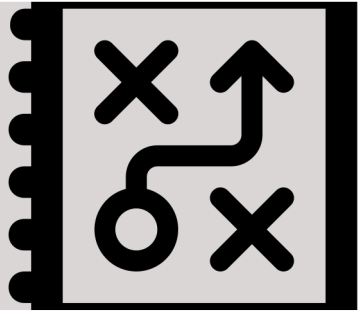
Develop structures to support industry research sponsors and investigators with easier access to clinical trials services
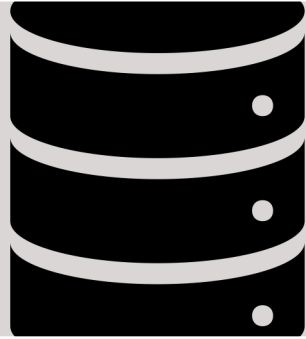
Build systems and processes that support enterprise-wide clinical research today and allow for future growth

Create a quality program that supports clinical research quality and compliance and ACRES Accreditation
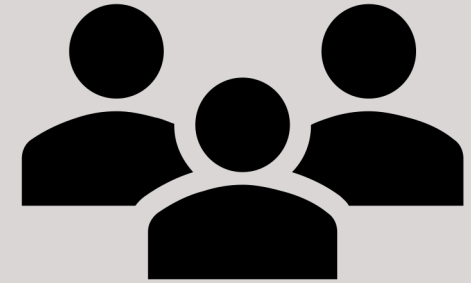
Drive culture change by engaging with staff, providers and patients to enhance participation in clinical research

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Currently multiple and inconsistent processes and systems exist to support research

Strategy

Create standard systems and processes to support clinical research across enterprise

Related UW Health Goal

Translational Research & Innovation, Quality, Information Management

Key Tactics

a Implement consistent training/job descriptions/competencies and recruiting for all research staff

b Identify IT system needs to support clinical research and implement across organization

c Create standard operating procedures (SOPs) for clinical research that are supportive of operations and meet ACRES Standards

d Create capacity to easily move from scientific discovery to clinical trials

Action Items/ Notes

Research coordinator on-boarding/training, competency-based career track for all clinical research staff

Create scalable and adaptable systems to support varied locations and types of research
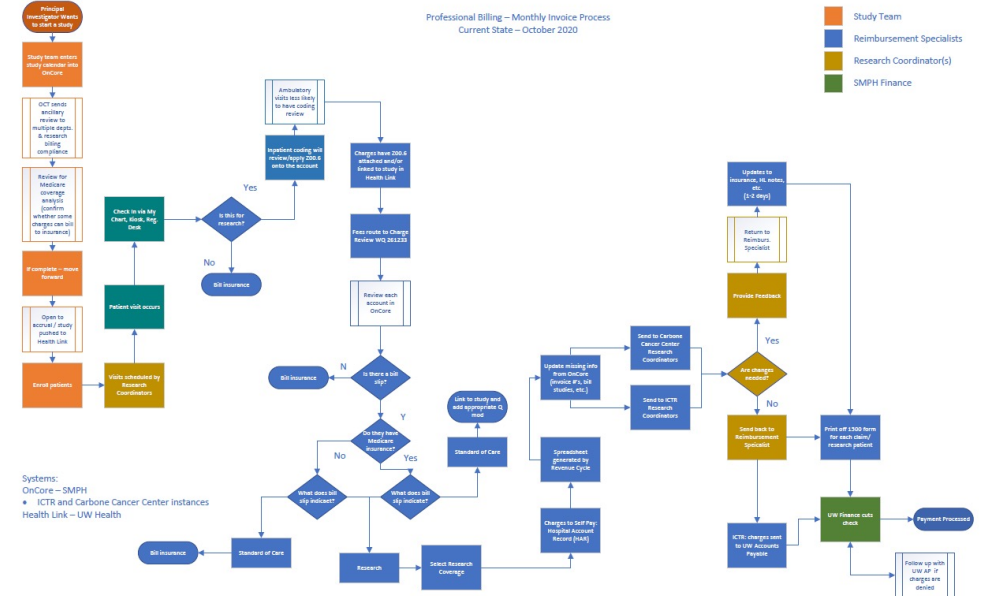
Consolidate and standardize CT SOPs organization-wide; train all research staff on SOPs

Establish partnerships where we need new or additional expertise; develop current programs to be more comprehensive

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Current State
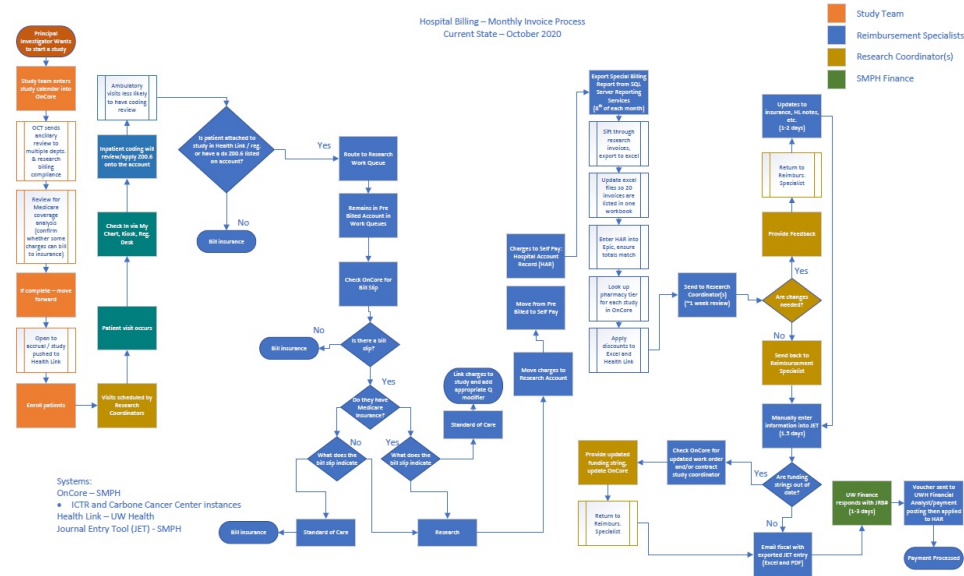
- HB and PB workflows
- Numerous systems
- Manual updates between systems
- Multiple handoffs

Goal: Automate clinical research billing to allow the enterprise to process an increased number of research patient encounters on a monthly basis without having to add additional staff.

- **Reduce the turnaround time for billing entry requests to be entered from 60 to 45 days by August 31, 2021**

- **Move PB to self-pay instead of insurance billing and get research account billing to single billing office by June 8, 2021**

What are we going to change?	Benefits of the Project

• Clinical research billing workflow
    • Use Epic functionality to link encounters and orders to research studies to enable charge review process within Health Link
    • Epic generated invoices for HB charges
	• Streamlined process
	• Eliminate manual entries/transfer of files and data between UWH and SMPH
	• Improve billing compliance
	• Reduced errors

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What is Changing?

Activity	Current State	Future State
Study Set-Up	Initiated and managed by the study teams	No change
Encounters & Orders	Marked by scheduling as "related to research study" or "unknown" have all charges routed to research work queue	Encounters linked to research study before/during visit and orders linked before signing by research study team
Charge Review	• Special Billing Team reviews charges in work queue after each visit • Study teams review charges in a monthly spreadsheet generated from Health Link • Special Billing Team manually updates Health Link	Review to occur in Health Link after each visit by: • Special Billing Team • Research Users Confirmation of review captured in Health Link
Invoicing	Separate submissions to UW for HB and PB charges	Statements to be issued out of Health Link for HB charges

○ **Confirm your research users have the appropriate Health Link access**

○ **If Research Coordinator security is needed, training is required, and number of attendees is limited**

- Upcoming classes are 4/7 and 5/12 from 8AM-12PM

○ **Determine who will be responsible for two step billing review**

- Look for upcoming training

- Billing review must be completed for studies to be invoiced

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Schedule

#	Deliverable	Target Completion Date
1	Establish future state workflow	Complete
2	Finalize UWH Policy 2.13 for future state workflow	5/31/21
3	Encounter & Order Linking Training	3/15 – 4/12
4	Go Live: Encounter & Order Linking	4/12/21
5	Two Step Billing Review Training	May 2021
6	Go Live: Two Step Billing Review	5/31/21
7	Go Live: Health Link Statements	7/8/21

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Appendix

In Scope	Out of Scope
• Clinical research billing that occurs within UW Health facilities • Research patients in the ambulatory and inpatient setting • Cutover to use Epic method for all upcoming encounters • Enable encounters and orders to be linked to research studies • Collaboration with leaders within UW Health, SMPH, Carbone Cancer Center, OCT and UW Finance to ensure understanding and alignment of the work • Training of staff to new processes • Determine how information routes to study team to confirm research encounters and orders • Review research tiers to ensure alignment between HB and PB to meet today's clinical research trial needs • Incorporate two-step billing review into overall process	• Conversion of past encounters to Epic method • Retroactive conversion of Health Link orders for research studies • Interface of the study calendar (future phase) • SwedishAmerican clinical research billing

1. **Any changes to scope will need to be approved by the Clinical Research Billing Advisory Group**

2. **Changes will be documented in the Project Decision Log**

3. **Changes will be communicated to the project team**

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