Companion Guide – Research Billing Questions

Patient/subject presents with a research-related billing concern:

- If not already connected with the study team, connect patient/subject with the study's Clinical Research Coordinator (CRC)
    - If patient/subject does not know the CRC:
        - Trying searching in EPIC – go to yellow research participant flag. Click on the study title to find the CRC's name which will be listed under Patient-Specific Coordinators. Need to know specific study patient/subject is on to find this information.
        - If the CRC cannot be found in EPIC, instruct the patient/subject to contact the study's Principal Investigator (PI) to ask for the CRC's name.

- If patient/subject concern is in relation to a specific bill, CRC collects copy of the bill.
    - CRC reviews bill and compares against Medicare Coverage Analysis (MCA) or Study Invoicing Grid (SIG)/Oncore Billing Grid and Informed Consent Form (ICF)
        - If item in question is billed correctly:
            - CRC provides re-education to patient/subject on research vs standard of care utilizing ICF.
        - If item appears to be billed incorrectly, CRC verifies if billing notification process was completed:
            - Visit checked into Oncore?
            - Medical College of Wisconsin (MCW) Billing Qualtrics form completed?
            - Office of Clinical Research and Innovative Care Compliance (OCRICC) notified if service represents a variance from the financial plan?
        - CRC to loop in Research Manager as appropriate.

If all the above was completed:

- CRC emails the Patient Financial Services (PFS) Financial Resolution Coordinator (FRC) at FHFinancialResolutionCoordinators@froedtert.com with the billing concern using the following template:

Email Template:

Hello,

I am reaching out regarding a billing question/concern for a patient/subject on a clinical trial:

Patient/subject name	
MRN	
Study Name	
IRB PRO	
OCRICC #	
Date of Service in Question (if applicable)	
Service in Question (if applicable)	

Summary of issue/concern:

Attach copy of patient/subject bill in question if applicable

CRC should include their contact information for follow up and questions.

PFS FRCs:

- FRC reviews the patient/subject concern and contacts the patient/subject.
- If the FRC cannot resolve the billing concern, they will determine where to forward the complaint as follows
    - If Hospital Billing (HB)/facility charge, FRC will forward to OCRICC at ocricc@froedtert.com
    - If Professional Billing (PB)/professional charges, FRC will forward to MCW Clinical Practice Services (CPS) at CPS_PB_Research_Support@mcw.edu
    - If both HB and PB charges, FRC will forward an email to both OCRICC and MCW CPS.
- If the FRC can resolve the billing concern, they will inform the CRC of the resolution so that CRC can close the case.

CPS:

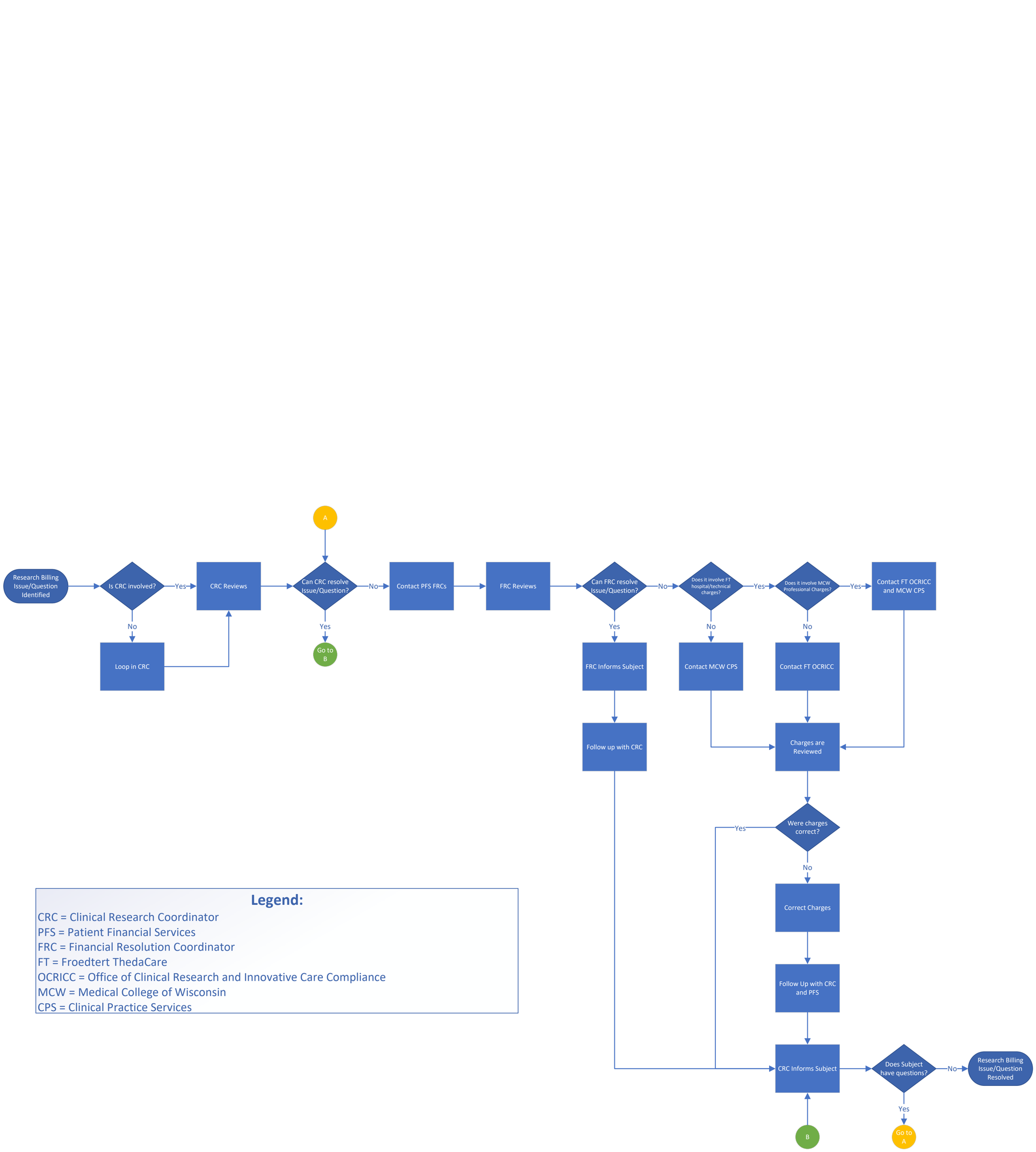
- CPS will review and respond to CRC and PFS with outcome of review. Outcomes could be:
    - Professional services billed correctly per study financial plan.
    - No professional services on account or services billed not associated with study (Podiatry or other unrelated service)
    - Corrections made to move services to study.
- If needed, route to: OCRICC@froedtert.com for further review and investigation.

OCRICC:

- OCRICC Billing Specialist will review and respond to CRC and PFS with outcome of review. Outcomes could be:
    - Froedtert services billed correctly per study financial plan.
    - No Froedtert services on account or the Froedtert services billed are not associated with a study.
    - Corrections made to move Froedtert services to study.
- If needed, route to: CPS_PB_Research_Support@mcw.edu for further review and investigation.

If patient/subject has additional questions:

- Return to beginning of process. CRC will evaluate and re-refer to the FRC if needed.



Legend:

CRC = Clinical Research Coordinator
PFS = Patient Financial Services
FRC = Financial Resolution Coordinator
FT = Froedtert ThedaCare
OCRICC = Office of Clinical Research and Innovative Care Compliance
MCW = Medical College of Wisconsin
CPS = Clinical Practice Services