How to review and reconcile charges for your Research Account in MiChart
MiChart Menu – Research Acct Review

- You may need to go to Tools
- Patient Care tools
- Research study maintenance
  (After the 1st time of accessing this, it should Automatically appear in your left drop down)
Enter the full number of your HUM including the leading zeros
This screen will appear

<table>
<thead>
<tr>
<th>Study Code</th>
<th>Study Name</th>
<th>Status</th>
<th>Principal Investigator</th>
<th>NCT#</th>
<th>IRB#</th>
</tr>
</thead>
<tbody>
<tr>
<td>00032434</td>
<td>RESEARCH, COHORT STUDY ...</td>
<td>Active</td>
<td></td>
<td>00032434</td>
<td></td>
</tr>
</tbody>
</table>

1 record loaded.

Click accept
Select “Transactions History” to view study account activity.
Once Transaction History has been selected this screen will appear.
Charges by Patient Selection Research Acct Review

Select patient from drop down menu.

Then check box for "View all HB Transactions"
The charges may take a few minutes to load - the screen will appear as if it is not moving - Please be patient!

Once charges are loaded scroll down the screen and you will see the following Headings:

**Hospital Charges Grouped By Patient**

Select All Groupers

Patient Name - [SSN] - [DOB]

- Smith, Mary – [xx-xx-1234] – [06/20/1966]

**Professional Charges Grouped By Patient**

Select All Groupers

Patient

- Doe, John – [09/24/1953]
- Smith, Mary – [06/20/1966]

Helpful Hint: You can use Ctrl F to find a patient in the charges. Click into the Hospital or Professional Charges area then select Ctrl F.
Check the box next to the patient name. Charges that have posted to your research account for this patient will show at the bottom.

<table>
<thead>
<tr>
<th>Patient Name - [SSN] - [DOB]</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>

**Itemized Hospital Charge Listing**

<table>
<thead>
<tr>
<th>Acct ID</th>
<th>Svc Date</th>
<th>Post Date</th>
<th>Code-Description</th>
<th>Rev Code</th>
<th>Qty</th>
<th>Amt</th>
</tr>
</thead>
<tbody>
<tr>
<td>20740638</td>
<td>10/02/2015</td>
<td>10/05/2015</td>
<td>030001073-HC-LAB-C... 0300-LABORATORY - ...</td>
<td></td>
<td>1</td>
<td>72.00</td>
</tr>
<tr>
<td>21219922</td>
<td>10/14/2015</td>
<td>10/26/2015</td>
<td>0740000004-HC-POLYS... 0740-EEG (ELECTROE...</td>
<td></td>
<td>1</td>
<td>3,003.00</td>
</tr>
<tr>
<td>21692565</td>
<td>12/14/2015</td>
<td>12/15/2015</td>
<td>030001073-HC-LAB-C... 0300-LABORATORY - ...</td>
<td></td>
<td>1</td>
<td>72.00</td>
</tr>
</tbody>
</table>

**NOTE – THE AMOUNT SHOWN DOES NOT REFLECT THE RESEARCH DISCOUNT RATE**
Charges by Patient – Professional
Research Account Review

Check the box next to the patient name. Charges that have posted to your research account for this patient will show at the bottom.

Select the Tx# to review additional details of the charge

NOTE – THE AMOUNT SHOWN DOES NOT REFLECT THE RESEARCH DISCOUNT RATE
Charges by Patient – Professional Research Account Review

This screen will appear after the Tx# is selected – Select the History Tab

![Image of a software interface showing a transaction detail for Doe, John]
Charges by Patient – Professional

Research Account Review

- Full $ Amount
- Amount Charged to Research Account
- Research Discount Applied

Doe, John

[Image of a computer screen showing data about charges and payments, with annotations highlighting specific amounts and transactions.]
Please note that everyone may not have the option to review the patient account in MiChart.

It may be necessary for you to contact MiChart for access- 936-8000 or MiChart-Questions@med.umich.edu.)
Review Charges on Patient Account

Select “Hospital Account” from top of screen
Review Charges on Patient Account

Select “Patient” tab from top of screen

“Account Status” all should be checked

“Account Type” Check HB and PB
Review Charges on Patient Account

Enter Patient Medical Record Number (must have preceding zeros) – Press Enter
Review Charges on Patient Account

This screen will appear:

<table>
<thead>
<tr>
<th>ID</th>
<th>Patient Name</th>
<th>Service Area</th>
<th>Class</th>
<th>Status</th>
<th>Type</th>
<th>Balance</th>
<th>Adm Date</th>
<th>Dis Date</th>
<th>Adm Dx</th>
<th>Guar Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>8947638</td>
<td>Doe, John</td>
<td>UMHS</td>
<td>Outpatient</td>
<td>CLOSED</td>
<td></td>
<td>0.00</td>
<td>05/14/2013</td>
<td>05/14/2013</td>
<td></td>
<td>P/F</td>
</tr>
<tr>
<td>11576896</td>
<td>Doe, John</td>
<td>UMHS</td>
<td>Outpatient</td>
<td>CLOSED</td>
<td></td>
<td>0.00</td>
<td>11/22/2013</td>
<td>11/22/2013</td>
<td></td>
<td>P/F</td>
</tr>
</tbody>
</table>
Review Charges on Patient Account

You may also enter a Date Range

Click the Adm Date to sort in date order (newest to oldest) click twice
### Review Charges on Patient Account

Double click the line with the date of service you would like to review.

<table>
<thead>
<tr>
<th>ID</th>
<th>Patient Name</th>
<th>Service Area</th>
<th>Class</th>
<th>Status</th>
<th>Type</th>
<th>Balance</th>
<th>Adm Date</th>
<th>Dis Date</th>
<th>Adm Dx</th>
<th>Guar Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>8947638</td>
<td>DOE, JOHN</td>
<td>UMHS</td>
<td>Outpatient</td>
<td>CLOSED</td>
<td></td>
<td>0.00</td>
<td>05/14/2013</td>
<td>05/14/2013</td>
<td></td>
<td>P/F</td>
</tr>
<tr>
<td>11573696</td>
<td>DOE, JOHN</td>
<td>UMHS</td>
<td>Outpatient</td>
<td>CLOSED</td>
<td></td>
<td>0.00</td>
<td>11/22/2013</td>
<td>11/22/2013</td>
<td></td>
<td>P/F</td>
</tr>
</tbody>
</table>

- **This symbol type indicates – HB charge**
- **This symbol type indicates – PB charge**

**HB = Hospital Billing**
**PB = Professional Billing**
Review Charges on Patient Account

This screen will appear:

Select Hosp Tx Inquiry to review HB charges if you selected a line with

Select Prof Tx Inquiry to review PB charges if you selected a line with
Review Charges on Patient Account

Hosp Tx Inquiry Screen

Hosp Tx Inquiry - 24 of 390 Accounts

Click Revenue Code Box to Expand Items Billed
Review Charges on Patient Account

Select “Acct List” to return to listing with dates of service
Review Charges on Patient Account

Prof Tx Inquiry Screen

<table>
<thead>
<tr>
<th>Acct Summary</th>
<th>Guar Summary</th>
<th>Status Summary</th>
<th>Report Viewer</th>
<th>Doc Review</th>
<th>Hosp Tx Inquiry</th>
<th>Prof Inquiry</th>
<th>Prof Tx Inquiry</th>
<th>Prof Tx Inquiry</th>
<th>Liability Buckets</th>
<th>Prof Inv Inquiry</th>
<th>Coverages</th>
<th>Claim Info</th>
<th>Coding</th>
<th>Code Integration</th>
<th>Daily Charges</th>
<th>Account Contact</th>
<th>History</th>
</tr>
</thead>
</table>

Professional Transaction Inquiry - 28 of 390 Accounts

- **Charges:** 270.00
- **Payments:** 0.00
- **Adjustments:** 0.00

**Insurance:**
- **Total:** 270.00
- **Current Balance:** 270.00
- **Self-pay:** 0.00
- **Undistributed:** 0.00

**Transactions (Restricted - Current Account)**

<table>
<thead>
<tr>
<th>TR#</th>
<th>Svc/Dep Dt</th>
<th>Patient</th>
<th>Status</th>
<th>Procedure</th>
<th>Department</th>
<th>Amount</th>
<th>S-P Due</th>
<th>Ins Due</th>
<th>Total Due</th>
<th>Bill Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>899</td>
<td>05/20/21</td>
<td></td>
<td></td>
<td>53970</td>
<td>NHC DIAG VASCULAR</td>
<td>270.00</td>
<td>0.00</td>
<td>270.00</td>
<td>270.00</td>
<td>IM Cardiology Physician PL1</td>
</tr>
</tbody>
</table>

**Transaction Detail (Tx 899)**

- **CHG - PC-DUPLEX EXTREM VENOUS,BILAT**

Screen will show CPT and Item billed
Charge Corrections

If charges are identified that should not be on the research account or the patient account please submit a correction via the JIRA system.
Helpful Research Account Tips

If you do not see charges on your Research Account that you are expecting to see then it could be:

1. No charges were posted to the Research Account
2. Charges are in a work queue waiting to be processed
3. Charges were not entered into MiChart or they are in a charge interface
4. Charges were billed to the patient MRN, check the patient account
CRAO Website
https://research.medicine.umich.edu/office-research/calendar-review-analysis-office
Select the “Resources” link to find

 Charge Correction Request Form
 Frequently Asked Questions (FAQs)
 Research Request Account form (RMRN)
 Other helpful tools
What is a CPT Code?

CPT = Current Procedure Terminology

Developed by the American Medical Association (AMA)

Describes the service or procedure provided to the patient

Captures the Professional Component of services provided
What is a CDM/EAP Code?

The CDM/EAP (Charge Description Master) allows for outpatient services (procedures) to be billed and reimbursed to the hospital.

The CDM captures the Hospital Component of services provided (staff, space, medical supplies, drugs, equipment, linens etc.)
Additional Useful Information - cont’d

What’s the difference between Professional and Hospital?

= $ to Physician for services provided (CPT) = Professional Component (PC*)

= $ to Hospital for space, equipment, supplies, staff etc. (CDM/EAP) = Hospital Component (HC*)

*Please Note: The PC and HC charges will not hit the research account simultaneously