M | CRAO

How to review and reconcile charges for your Research Account in MiChart

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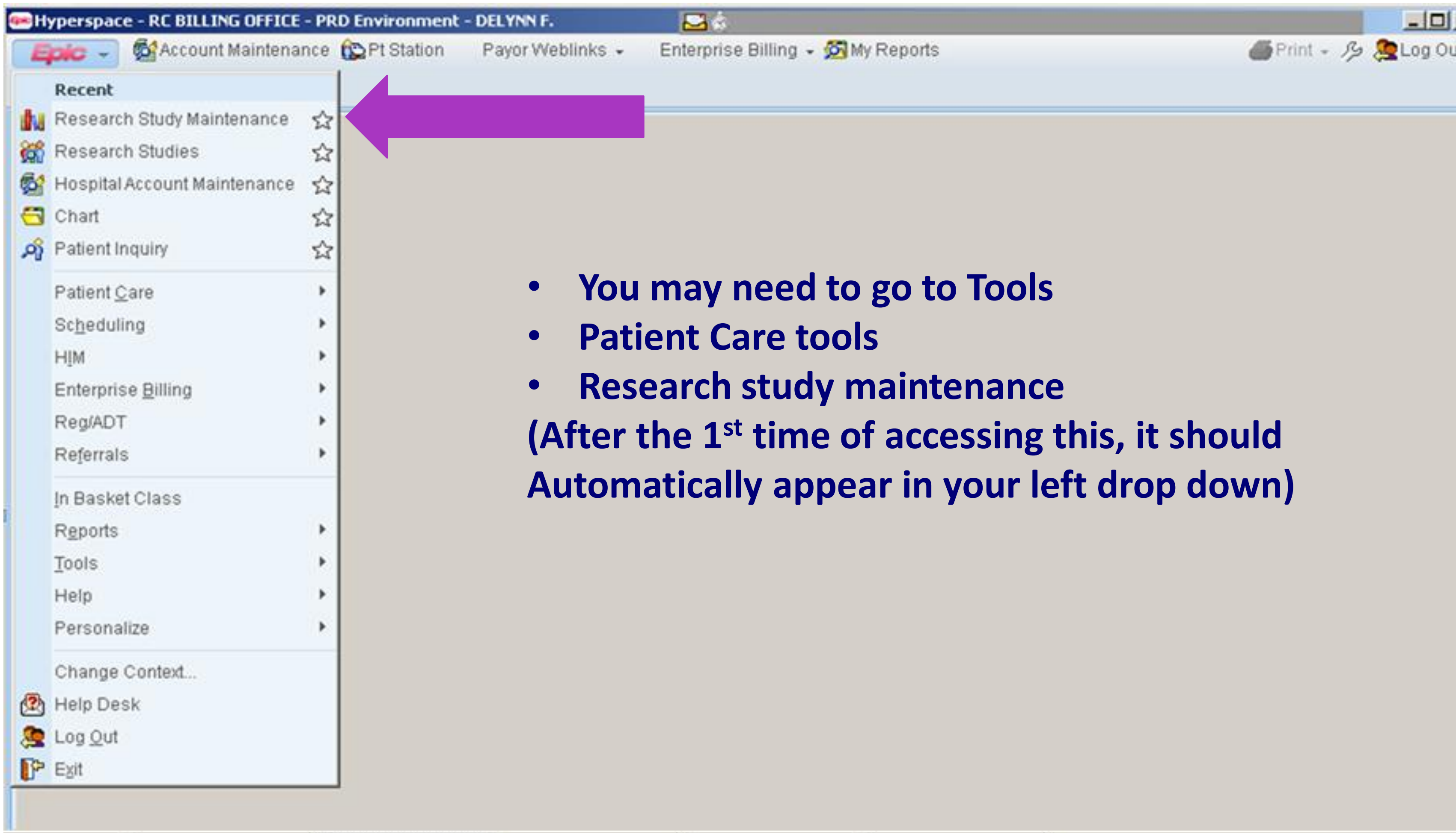
MiChart Menu – Research Acct Review

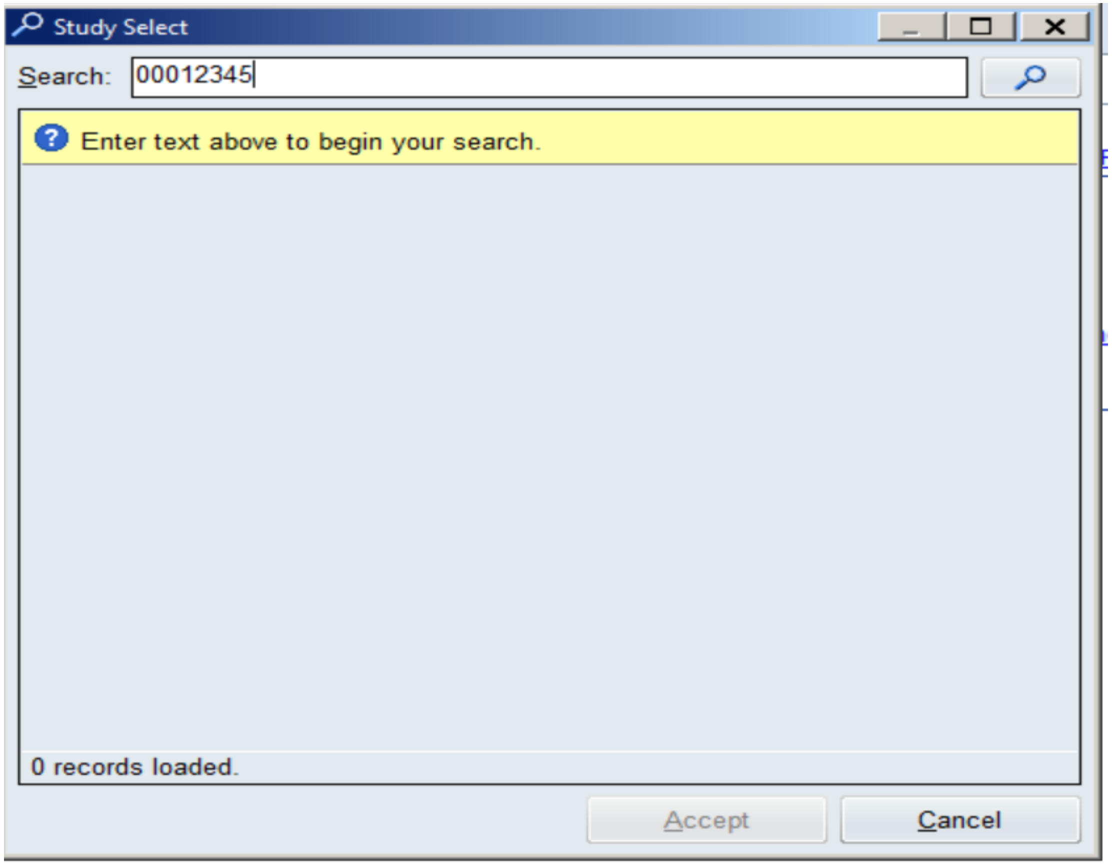


- You may need to go to Tools
- Patient Care tools
- Research study maintenance

(After the 1st time of accessing this, it should Automatically appear in your left drop down)

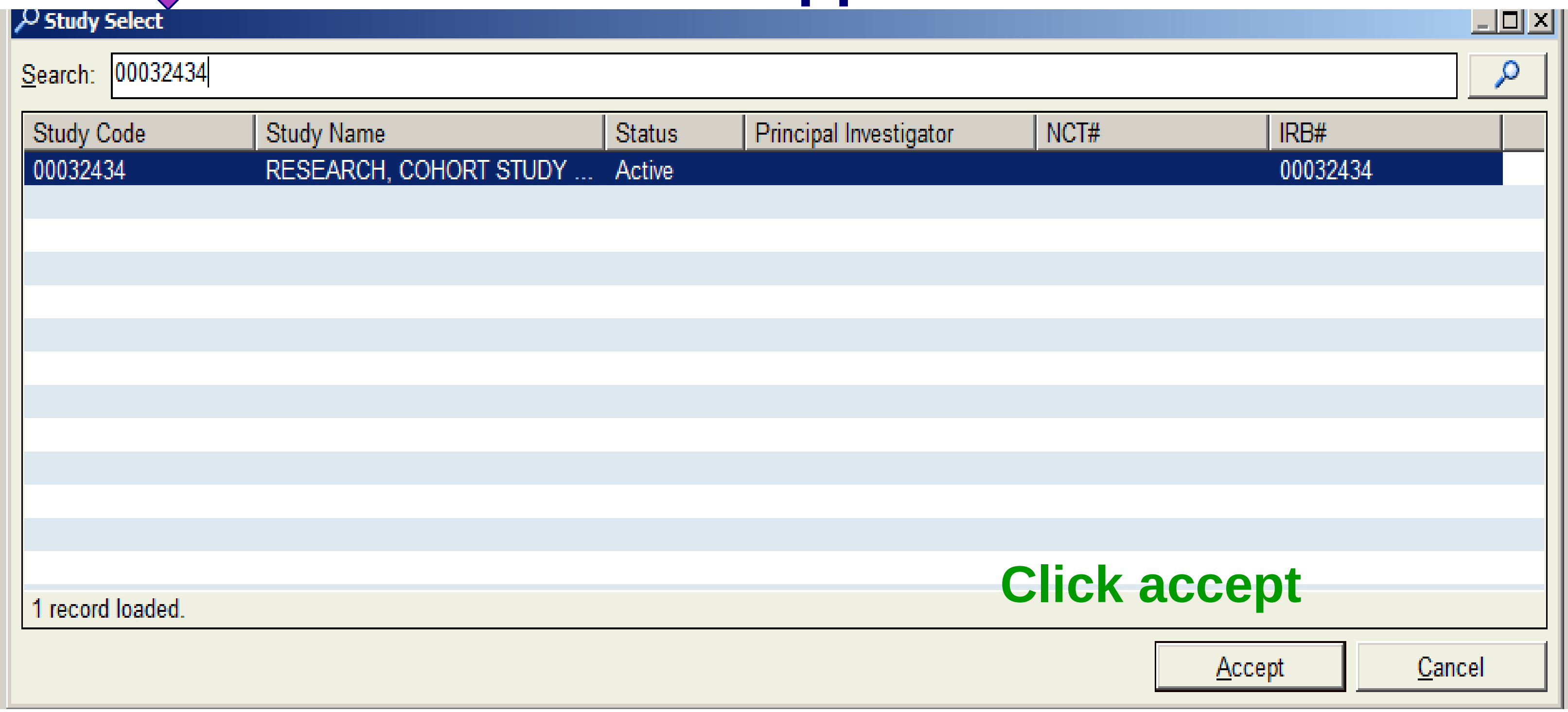
Research Acct Review

Enter the full number of your HUM including the leading zeros



Research Acct Review

This screen will appear



Click accept

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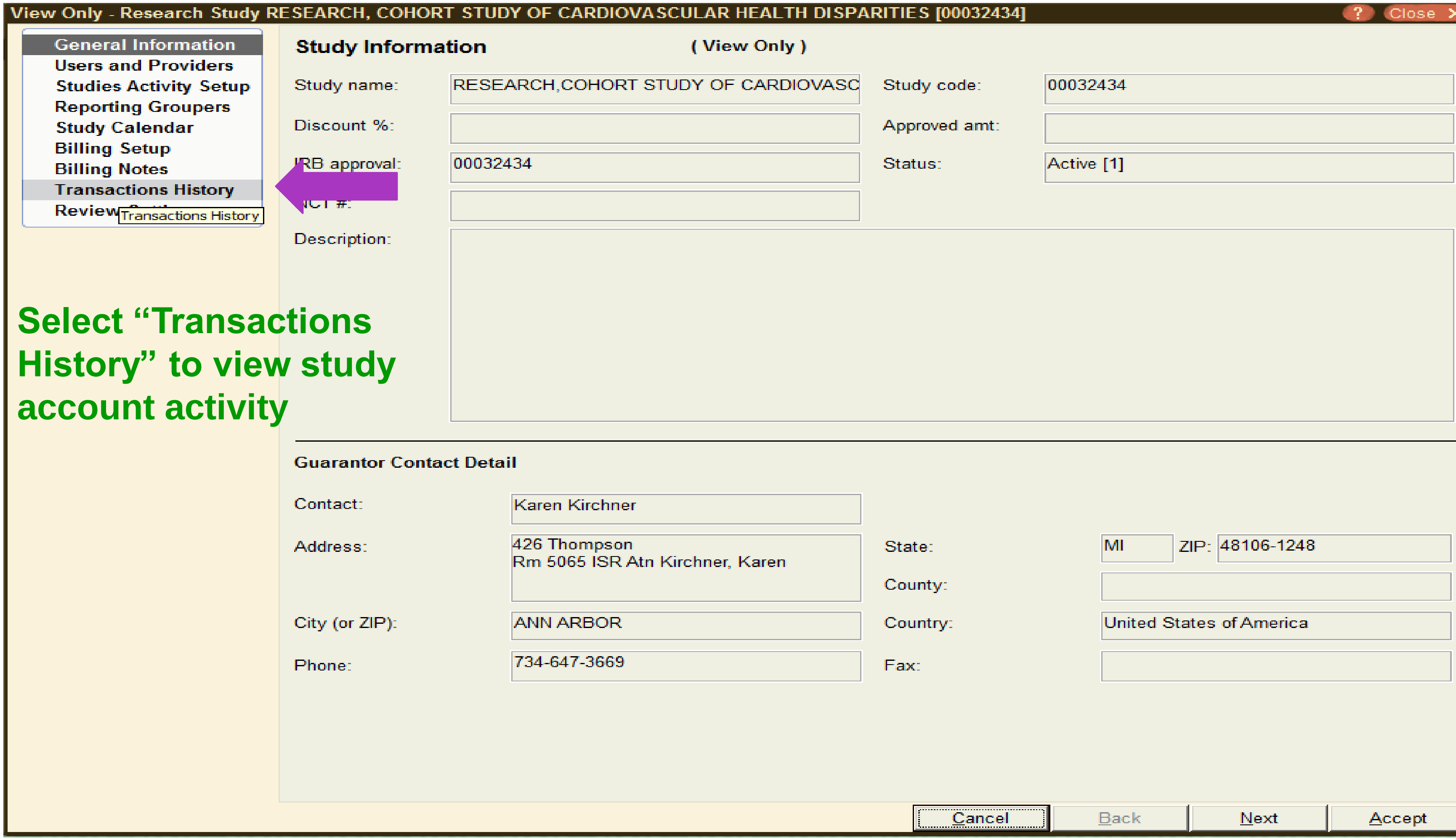
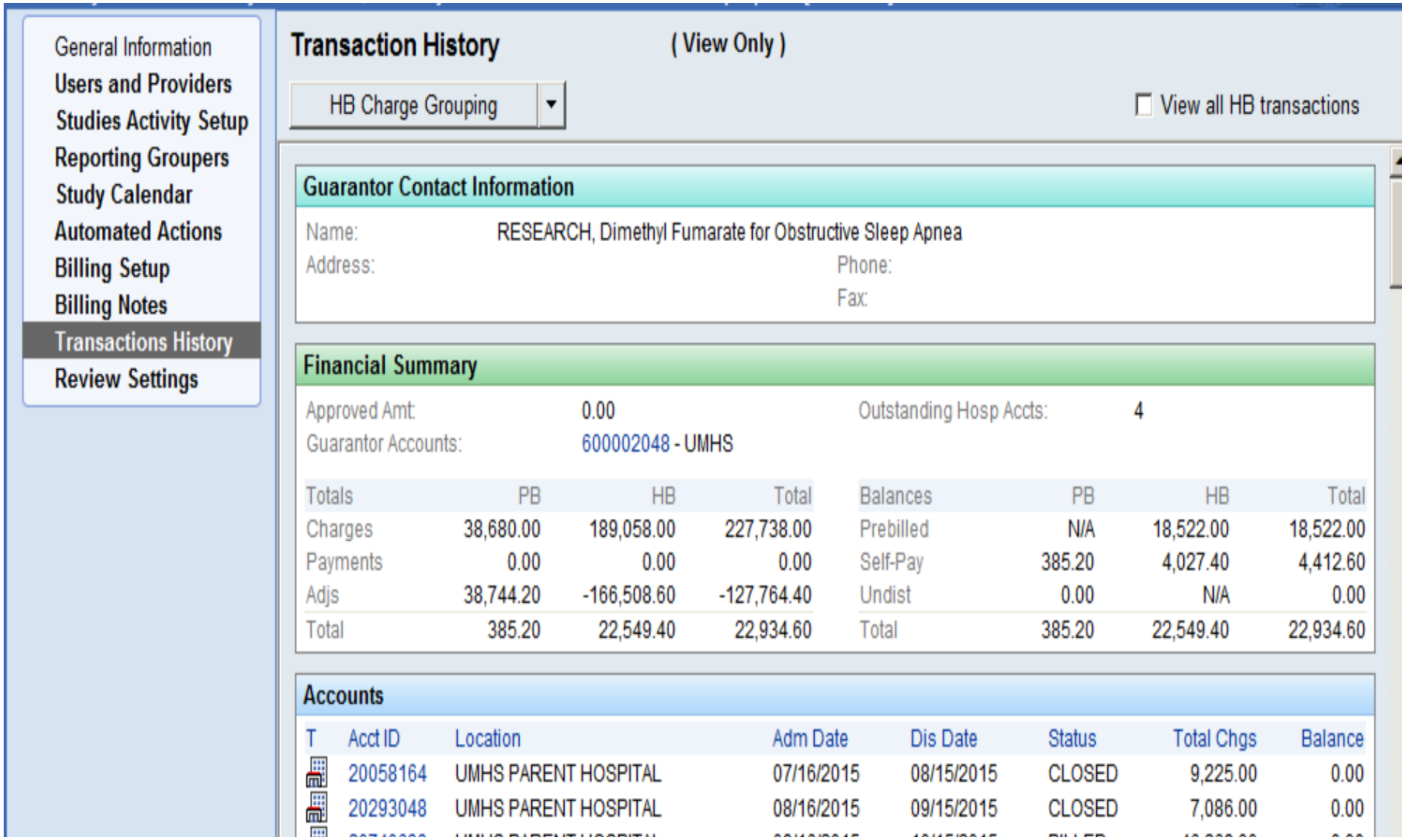
Research Acct Review



Select "Transactions History" to view study account activity

This screen will appear – Research Acct Review

Once Transaction History has been selected this screen will appear

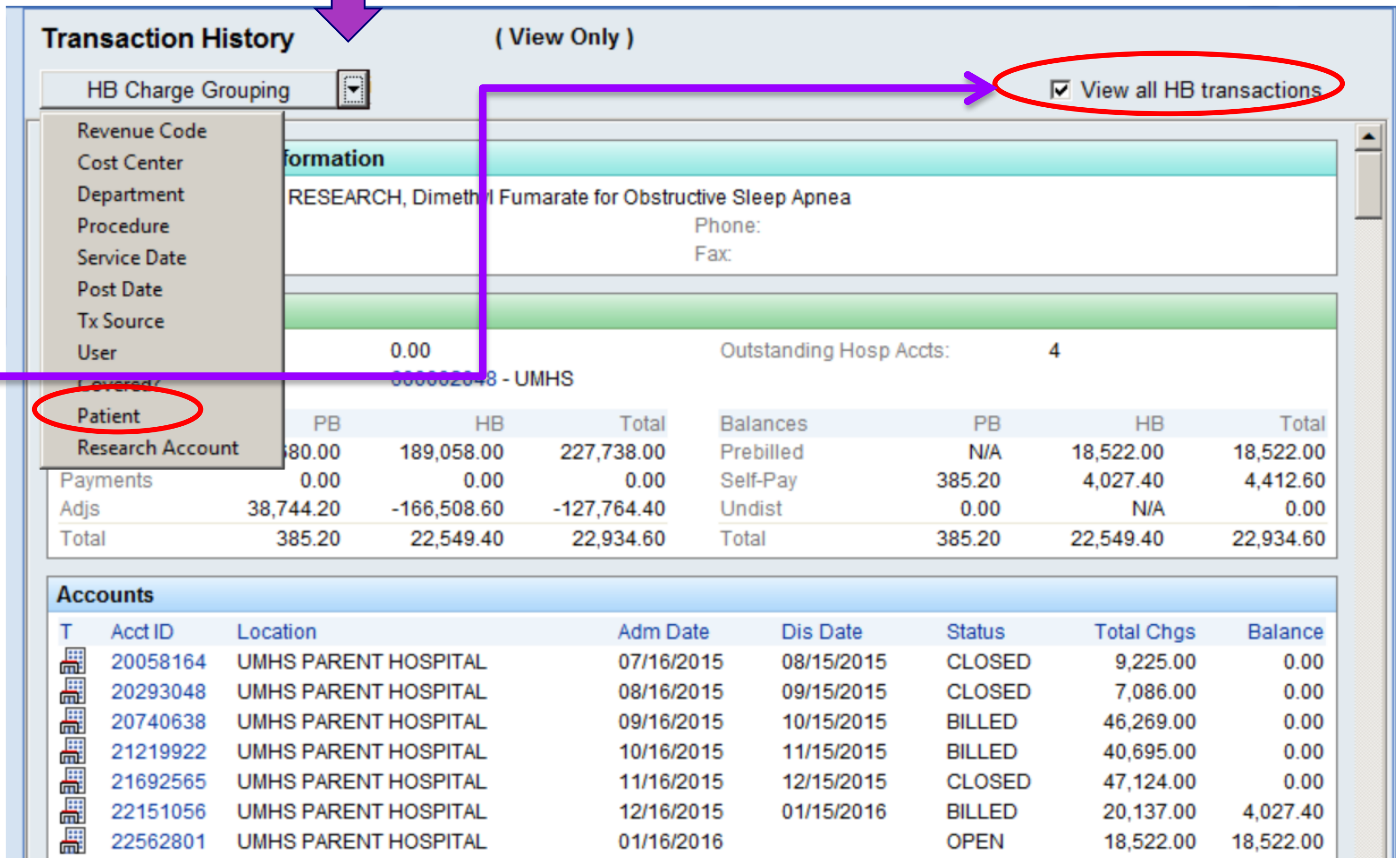


Charges by Patient Selection Research Acct Review

Click here to get drop down menu

Select patient from drop down menu.

Then check box for "View all HB Transactions"



Charges by Patient – Research Acct Review

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]

- [ ] **Doe, John – [xx-xx-1234] – [09/24/1953]**
- [ ] **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

Charges by Patient – Hospital – Research Acct 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.

Hospital Charges Grouped By Patient

Select All Groupers

Patient Name - [SSN] - [DOB]

- [x] **Doe, John – [xx-xx-1234] – [09/24/1953]**
- [ ] **Smith, Mary – [xx-xx-1234] – [06/20/1966]**

Itemized Hospital Charge Listing

Acct ID	Svc Date	Post Date	Code-Description	Rev Code	Qty	Amt
20740638	10/02/2015	10/05/2015	030001073-HC-LAB-C...	0300-LABORATORY - ...	1	72.00
21219922	10/14/2015	10/26/2015	074000004-HC-POLYS...	0740-EEG (ELECTROE...	1	3,003.00
21692565	12/14/2015	12/15/2015	030001073-HC-LAB-C...	0300-LABORATORY - ...	1	72.00

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.

Professional Charges Grouped By Patient

Select All Groupers

Patient

☑ **Doe, John – [09/24/1953]**

☐ **Smith, Mary – [06/20/1966]**

Select the Tx# to review additional details of the charge

Itemized Professional Charge Listing

	Tx#	Svc Date	Post Date	Flag	Code-Description	Modifier	Qty	Amount
	29	04/14/2016	05/16/2016	W	95782 - PC-POLYSOM <6 YRS SLEEP STAGE 4/...	26	1	659.00

NOTE – THE AMOUNT SHOWN DOES NOT REFLECT THE RESEARCH DISCOUNT RATE

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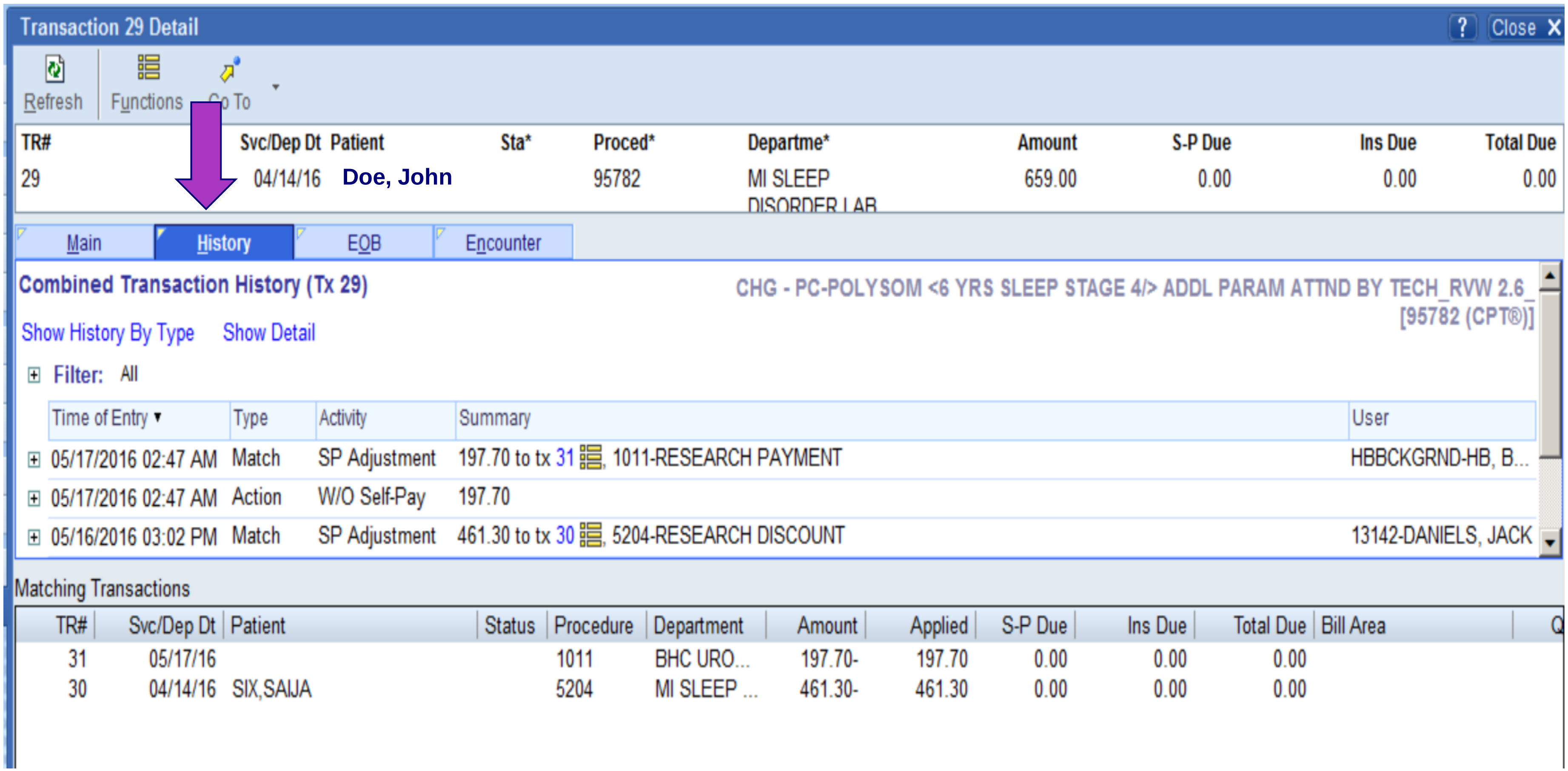
Charges by Patient – Professional

Research Account Review

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



Charges by Patient – Professional

Research Account Review

Transaction 29 Detail ? Close X

Refresh Functions Go To

Full $ Amount

TR#	Svc/Dep Dt	Patient	Sta*	Proced*	Departme*	Amount	S-P Due	Ins Due	Total Due
29	04/14/16	**Doe, John**	)	95782	MI SLEEP DISORDER LAB	659.00	0.00	0.00	0.00

Main | History | EOB | Encounter

Combined Transaction History (Tx 29)

CHG - PC-POLYSOM <6 YRS SLEEP STAGE 4/> ADDL PARAM ATTND BY TECH_RVW 2.6_ [95782 (CPT®)]

Show History By Type   Show Detail

Amount Charged to Research Account

Filter: All

Time of Entry	Type	Activity	Summary	User
05/17/2016 02:47 AM	Match	SP Adjustment	197.70 to tx 31, 1011-RESEARCH PAYMENT	HBBCKGRND-HB, B...
05/17/2016 02:47 AM	Action	W/O Self-Pay	197.70	
05/16/2016 03:02 PM	Match	SP Adjustment	461.30 to tx 30, 5204-RESEARCH DISCOUNT	13142-DANIELS, JACK

Research Discount Applied

Matching Transactions

TR#	Svc/Dep Dt	Patient	Status	Procedure	Department	Amount	Applied	S-P Due	Ins Due	Total Due	Bill Area
31	05/17/16			1011	BHC URO...	197.70-	197.70	0.00	0.00	0.00	
30	04/14/16	SIX,SAIJA		5204	MI SLEEP ...	461.30-	461.30	0.00	0.00	0.00	

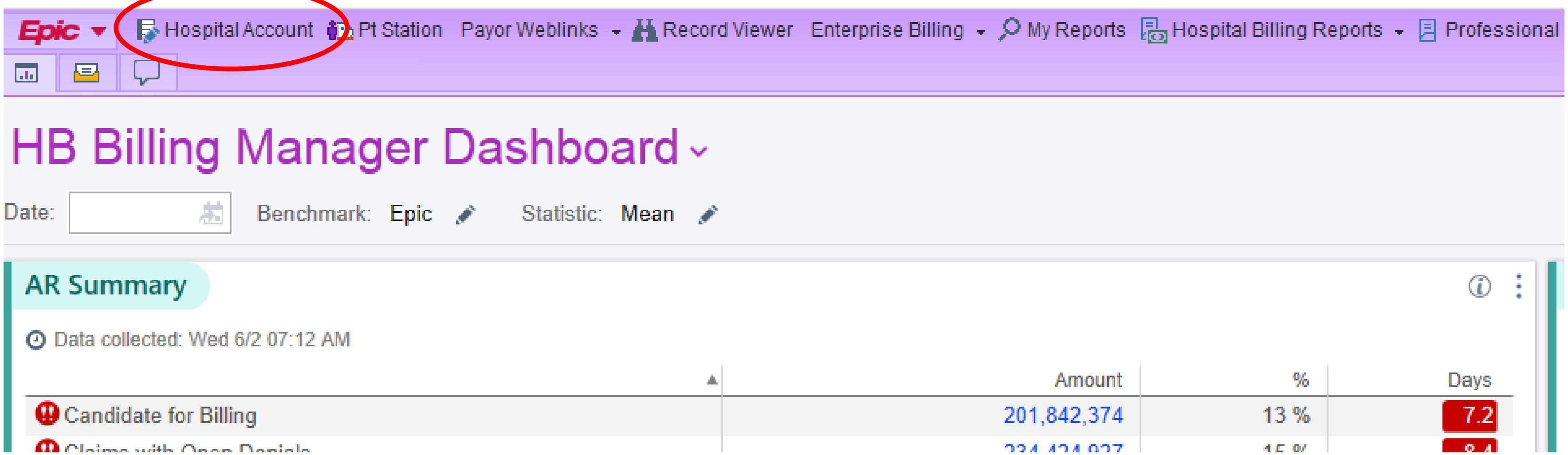
Review Charges on Patient Account

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)

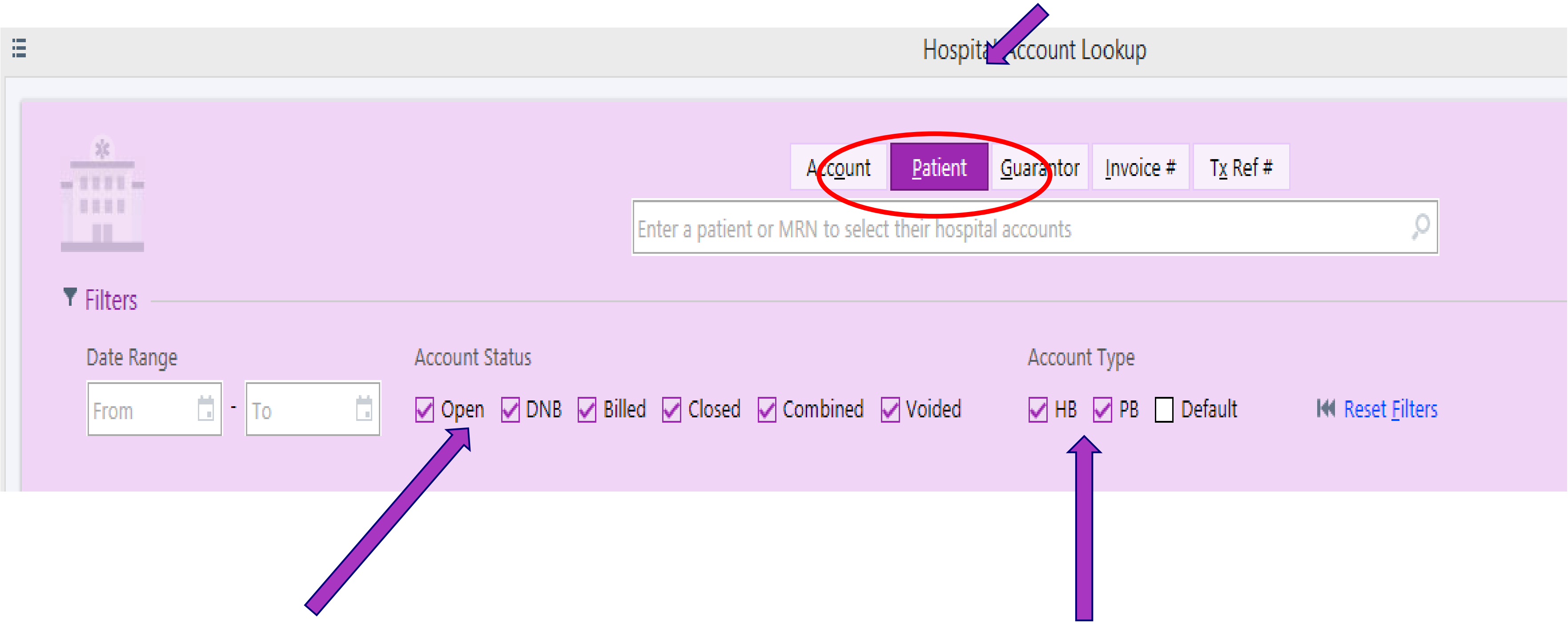
Review Charges on Patient Account

Select "Hospital Account" from top of screen



Review Charges on Patient Account

Select "Patient" tab from top of screen

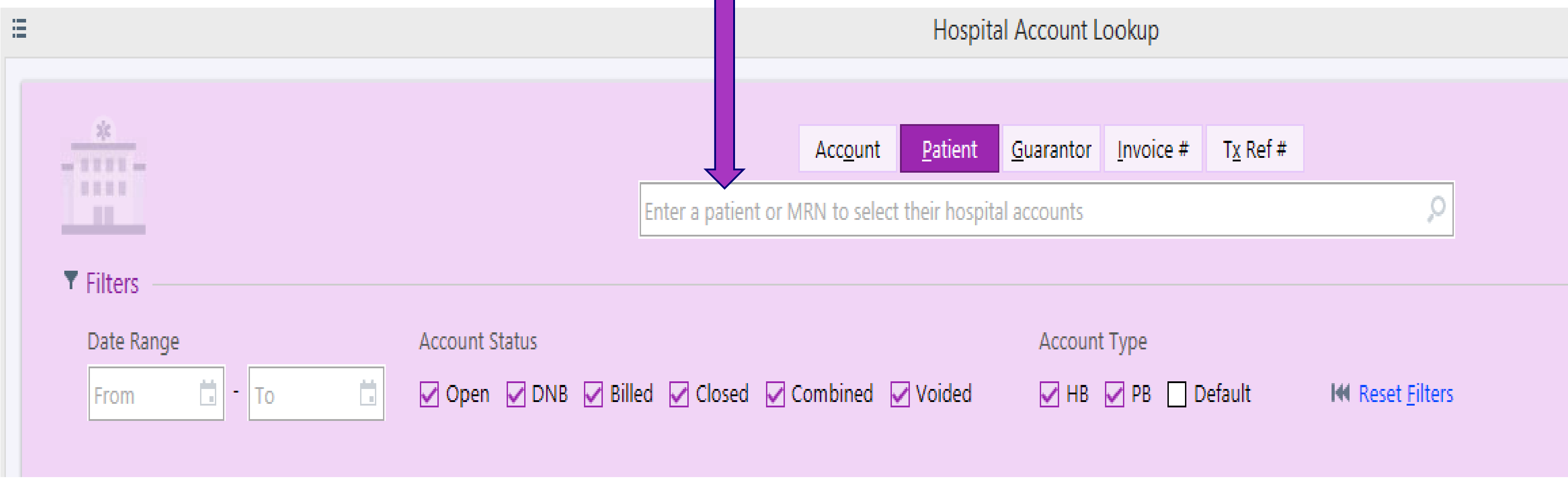


"Account Status" all should be checked

"Account Type" Check HB and PB

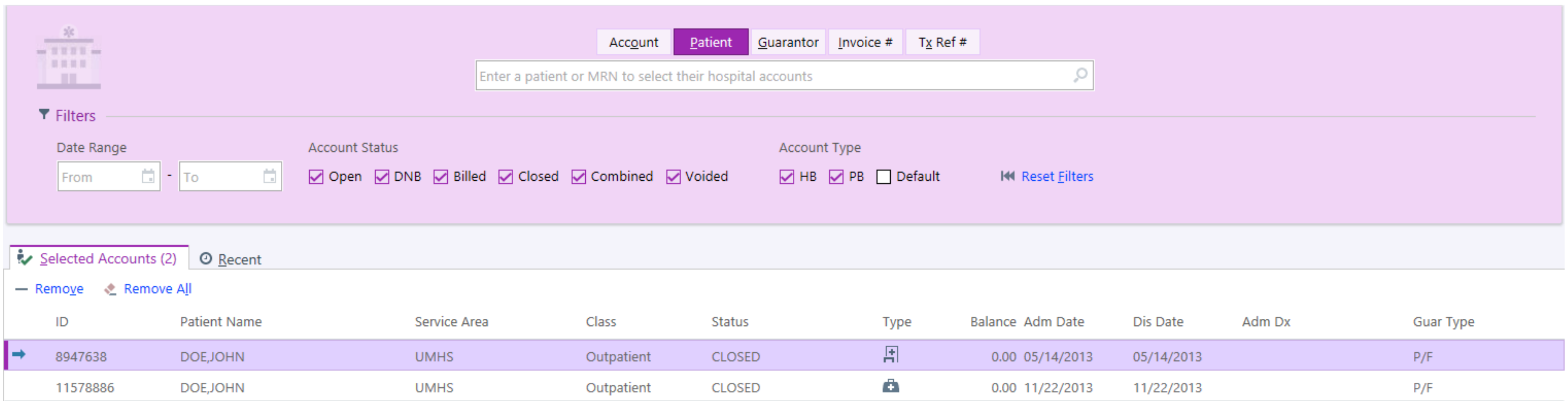
Review Charges on Patient Account

Enter Patient Medical Record Number (must have preceding zeros) – Press Enter

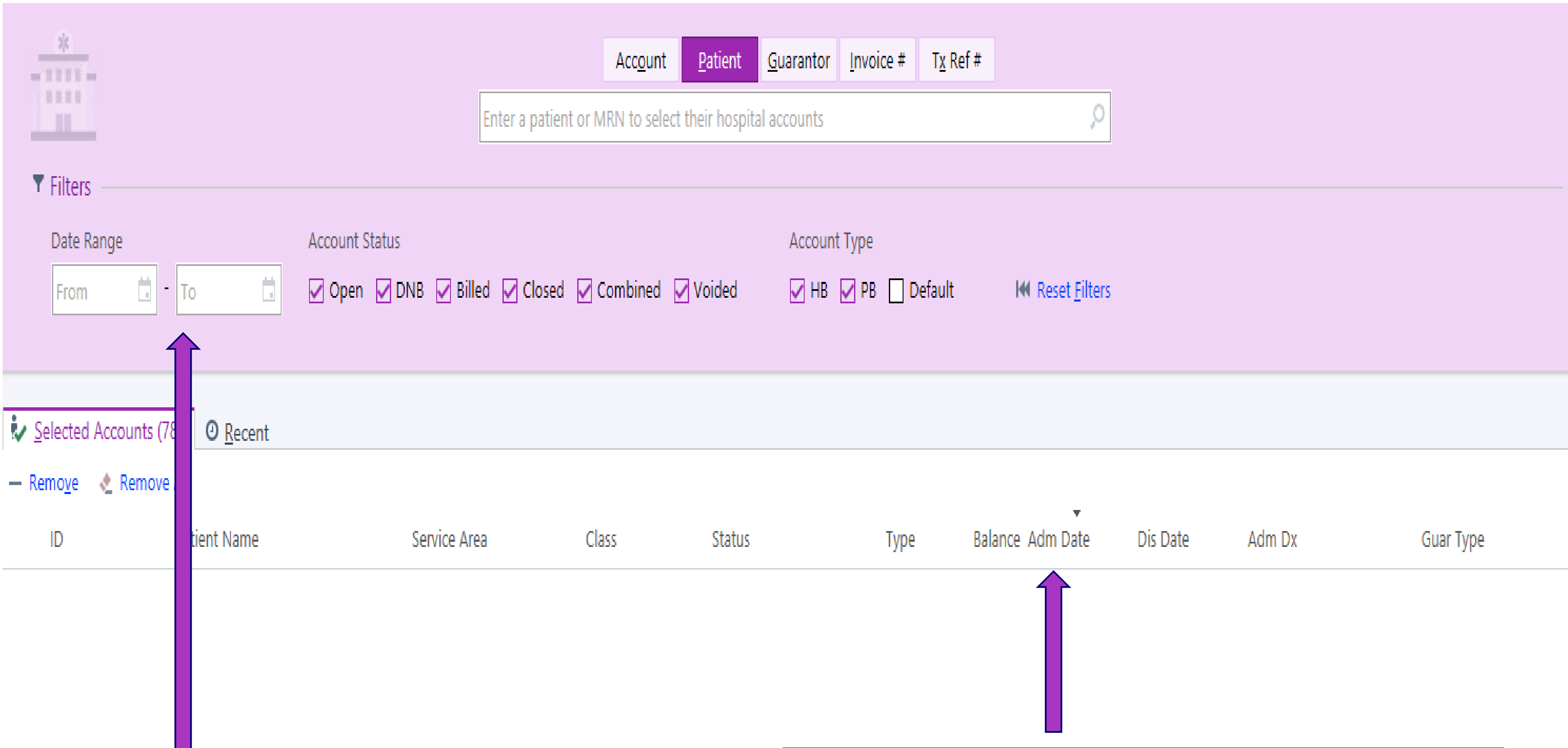


Review Charges on Patient Account

This screen will appear:



Review Charges on Patient Account

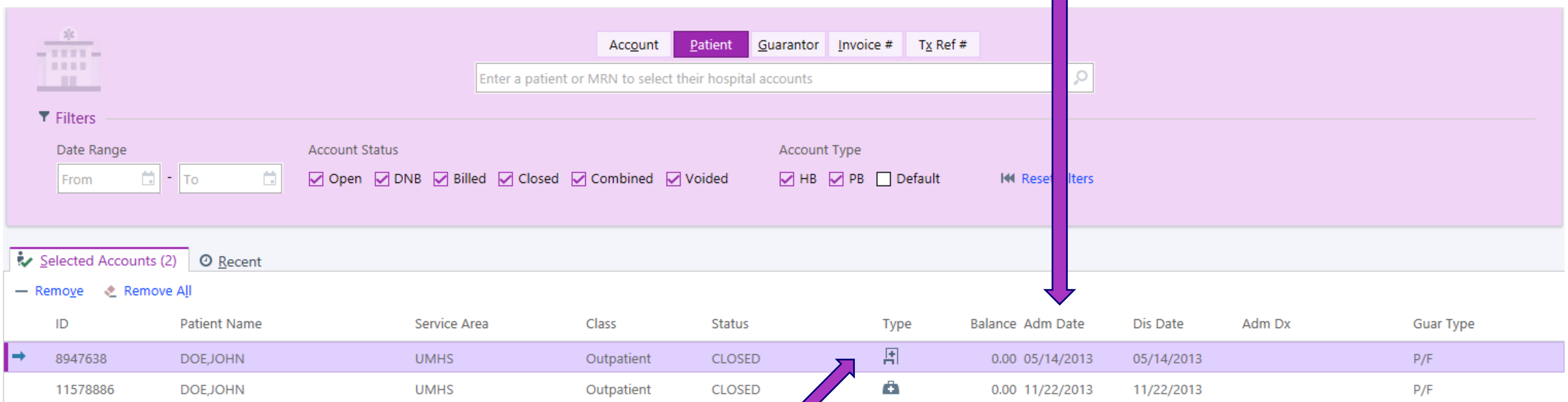


You may also enter a Date Range

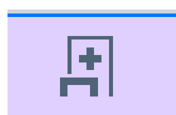
Click the Adm Date to sort in date order (newest to oldest) click twice

Review Charges on Patient Account

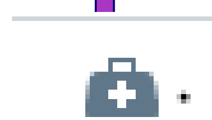
Double click the line with the date of service you would like to review



This symbol type indicates – HB charge



This symbol type indicates – PB charge



HB = Hospital Billing
PB = Professional Billing

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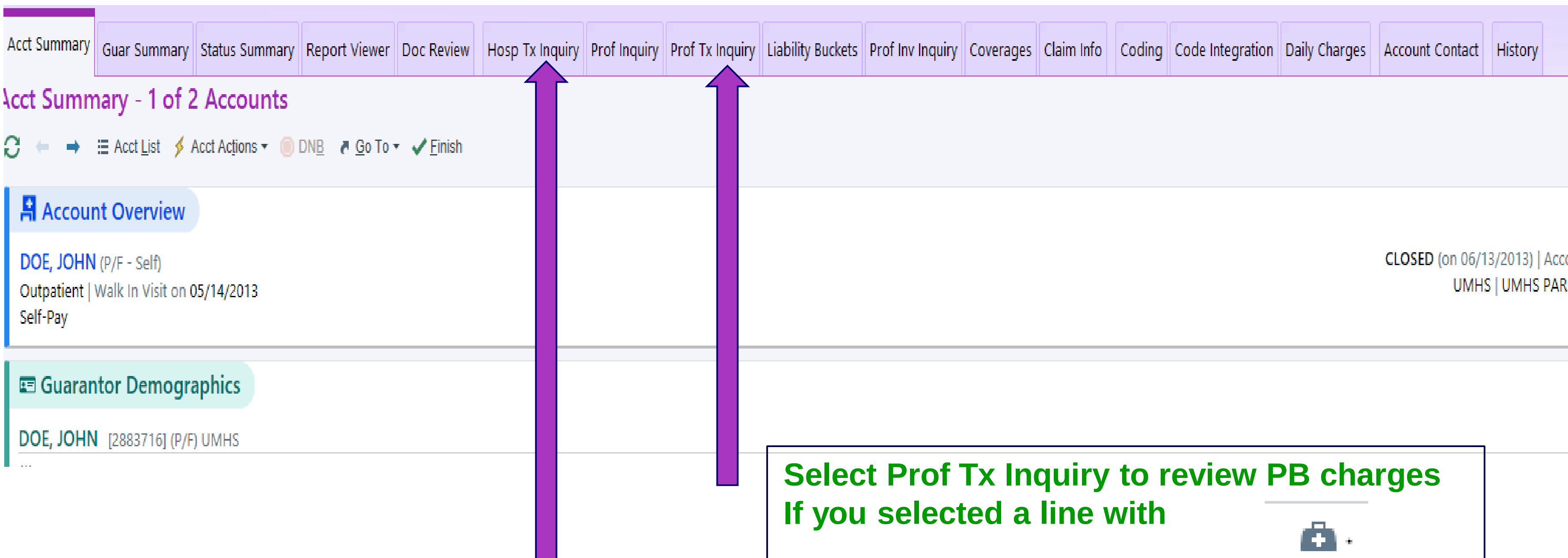
Review Charges on Patient Account

This screen will appear:

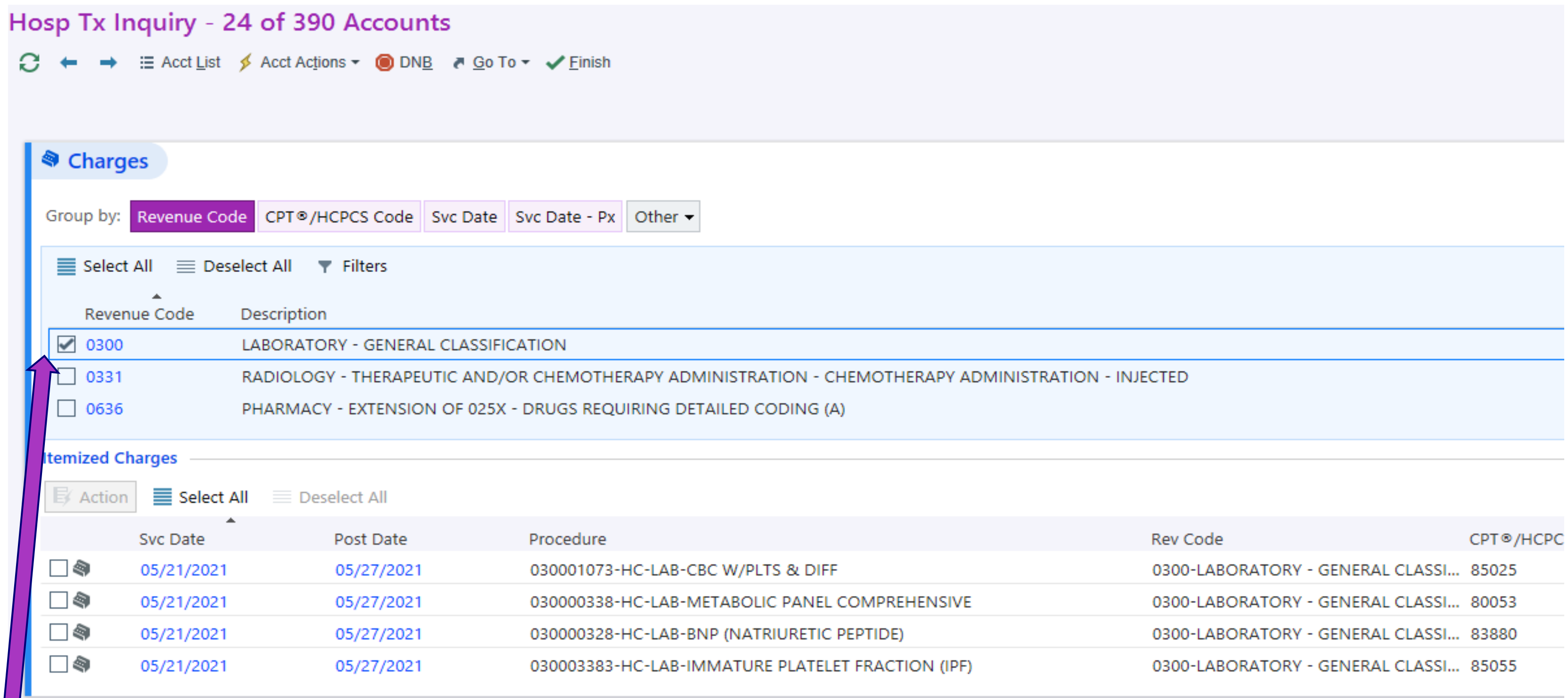


Select Prof Tx Inquiry to review PB charges
If you selected a line with

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

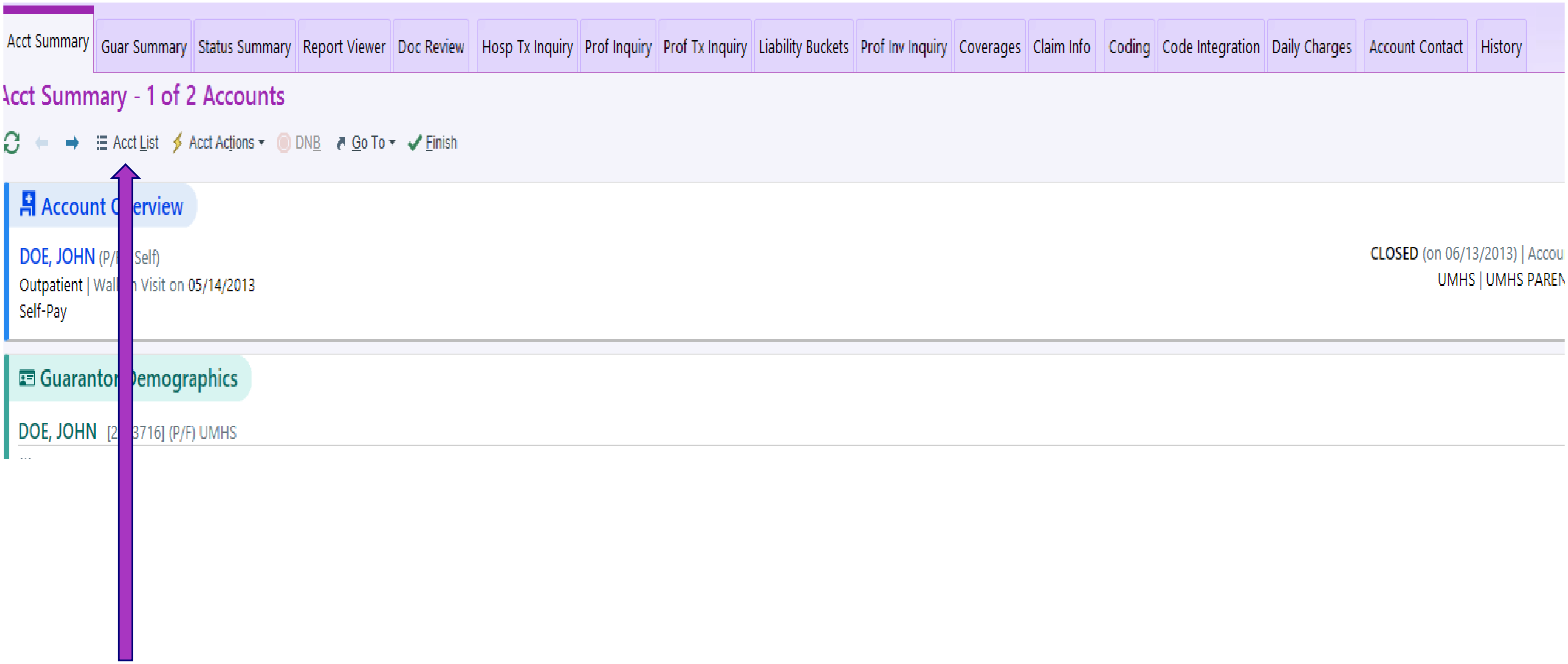
Review Charges on Patient Account

Hosp Tx Inquiry Screen



Click Revenue Code Box to Expand Items Billed

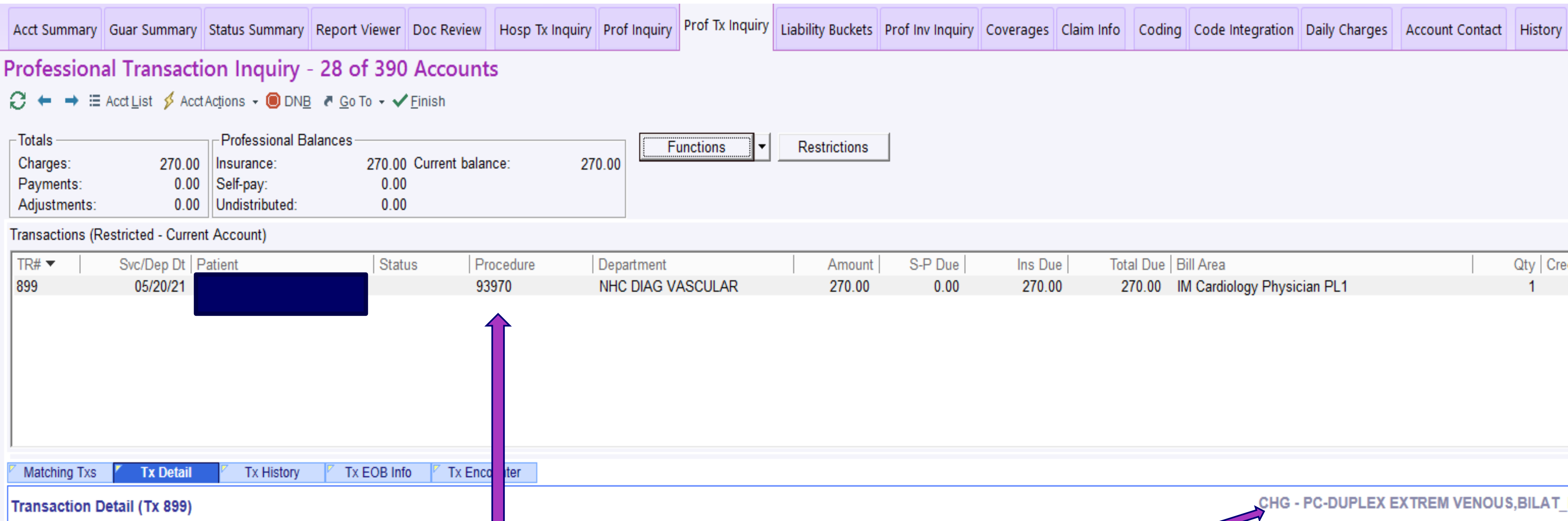
Review Charges on Patient Account



Select "Acct List" to return to listing with dates of service

Review Charges on Patient Account

Prof Tx Inquiry Screen



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

Helpful Resources

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

Additional Useful Information

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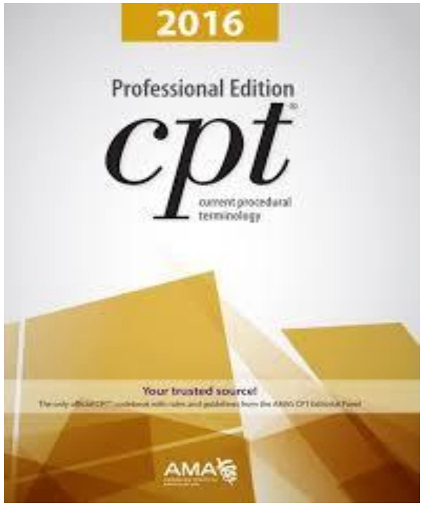
What is a CPT Code?

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



Additional Useful Information-*cont'd*

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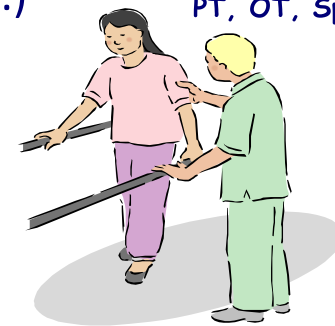
What is a CDM/EAP Code?

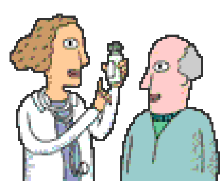
The CDM/EAP (Charge Description Master) allows for outpatient services (procedures) to be billed and reimbursed to the hospital

The CDM captures the Hospital Component of services provided (staff, space, medical supplies, drugs, equipment, linens etc.)

PT, OT, Speech



Infusions



Clinic Visits

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