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

This screen will appear

![Study Select]

1 record loaded.

Click accept
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

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

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

### Professional Charges Grouped By Patient

<table>
<thead>
<tr>
<th>Select All Groupers</th>
<th>Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Doe, John – [09/24/1953]</td>
</tr>
<tr>
<td></td>
<td>Smith, Mary – [06/20/1966]</td>
</tr>
</tbody>
</table>

**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.


NOTE – THE AMOUNT SHOWN DOES NOT REFLECT THE RESEARCH DISCOUNT RATE
Check the box next to the patient name. Charges that have posted to your research account for this patient will show at the bottom.

Doe, John – [09/24/1953]

Smith, Mary – [06/20/1966]

Select the Tx# to review additional details of the charge

NOTE – THE AMOUNT SHOWN DOES NOT REFLECT THE RESEARCH DISCOUNT RATE
This screen will appear after the Tx# is selected – Select the History Tab
Charges by Patient – Professional
Research Account Review

Full $ Amount

Amount Charged to Research Account

Research Discount Applied
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)
Select “Account Maintenance” from top of screen
Review Charges on Patient Account

Enter Patient Medical Record Number

Click “Accept”
Review Charges on Patient Account

This screen will appear
You may click the Adm Date to sort in date order (newest to oldest).

<table>
<thead>
<tr>
<th>ID</th>
<th>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>
</tr>
</thead>
<tbody>
<tr>
<td>1058662</td>
<td>Doe, John</td>
<td>UMHS</td>
<td>Outpat</td>
<td>CLOS</td>
<td>De</td>
<td>0.00</td>
<td>02/21/2012</td>
<td>02/21/2012</td>
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<tr>
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<td>CLOS</td>
<td>PB</td>
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<td>10/30/2013</td>
<td>10/30/2013</td>
<td></td>
</tr>
</tbody>
</table>
**Review Charges on Patient Account**

Column Type: HB = Hospital Billing  PB = Professional Billing
Double Click the HB or PB for the date of service you would like to review

![Hospital Account Select Window]

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<td>10/30/2013</td>
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</tr>
</tbody>
</table>
Review Charges on Patient Account

1. To review Hospital Billing Select “Hosp Tx Inquiry” from the left tab
2. Select the Check Box to see the charges on the patient account
3. To return to patient date listing select the Acct List
Review Charges on Patient Account

1. To review Professional Billing Select “Prof Tx Inquiry” from the left tab
2. Select each line to see the charges on the patient account
3. The description and code of the item will be shown below for line selected
4. To return to patient date listing select the Acct List
# Charge Corrections

If charges are identified that should not be on the research account please submit a charge correction form - **CRB Request Form**

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## Clinical Research Billing
**CHARGE RECONCILIATION REQUEST FORM**

Submit to: crbissues-help@med.umich.edu  
Date submitted: ____________

<table>
<thead>
<tr>
<th>Requested by</th>
<th>Email</th>
<th>Phone #</th>
<th>Department</th>
<th>Title</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>____________</td>
<td>_______</td>
<td>_______</td>
<td>__________</td>
<td>_______</td>
<td>________</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HUM #</th>
<th>Patient Name</th>
<th>MRN</th>
<th>Study/Protocol</th>
<th>Visit</th>
<th>Date of Service</th>
<th>Item/Service</th>
<th>ProFee</th>
<th>COI/MEAP</th>
<th>Reason for Request</th>
<th>Move to Account</th>
<th>Additional Notes from STIM</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Specify your request from the drop down</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**NOTE:** Please add lines for additional subjects to the bottom of this sheet and submit only one HUM per sheet.
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
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.)
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