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

- 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 HUM Number

Enter the full number of your HUM including the leading zeros
This screen will appear

Click accept
Select “Transactions History” to view study account activity
Once Transaction History has been selected, this screen will appear.

![Transaction History Screen](image-url)

### Transaction History

**Guarantor Contact Information**
- Name: RESEARCH, Dimethyl Fumarate for Obstructive Sleep Apnea
- Address: 
- Phone: 
- Fax: 

**Financial Summary**

<table>
<thead>
<tr>
<th></th>
<th>PB</th>
<th>HB</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Charges</td>
<td>38,680.00</td>
<td>189,058.00</td>
<td>227,738.00</td>
</tr>
<tr>
<td>Payments</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Adj's</td>
<td>38,744.20</td>
<td>-166,508.60</td>
<td>-127,764.40</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>385.20</td>
<td>22,549.40</td>
<td>22,934.60</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>PB</th>
<th>HB</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balances</td>
<td>Prebilled</td>
<td>N/A</td>
<td>18,522.00</td>
</tr>
<tr>
<td></td>
<td>Self-Pay</td>
<td>385.20</td>
<td>4,027.40</td>
</tr>
<tr>
<td></td>
<td>Undist</td>
<td>0.00</td>
<td>N/A</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>385.20</td>
<td>22,549.40</td>
<td>22,934.60</td>
</tr>
</tbody>
</table>

### Accounts

<table>
<thead>
<tr>
<th>T</th>
<th>Acct ID</th>
<th>Location</th>
<th>Adm Date</th>
<th>Dis Date</th>
<th>Status</th>
<th>Total Chgs</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>20058164</td>
<td>UMHS PARENT HOSPITAL</td>
<td>07/16/2015</td>
<td>08/15/2015</td>
<td>CLOSED</td>
<td>9,225.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>20293048</td>
<td>UMHS PARENT HOSPITAL</td>
<td>08/16/2015</td>
<td>09/15/2015</td>
<td>CLOSED</td>
<td>7,086.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Charges by Patient Selection

Select patient from drop down menu.

Then check box for “View all HB Transactions”
Charges by Patient

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:

<table>
<thead>
<tr>
<th>Hospital Charges Grouped By Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All Groupers</td>
</tr>
<tr>
<td>Patient Name - [SSN] - [DOB]</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Professional Charges Grouped By Patient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select All Groupers</td>
</tr>
<tr>
<td>Patient</td>
</tr>
</tbody>
</table>

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

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


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>1</td>
<td>72.00</td>
<td></td>
</tr>
<tr>
<td>21219922</td>
<td>10/14/2015</td>
<td>10/26/2015</td>
<td>074000004-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>1</td>
<td>72.00</td>
<td></td>
</tr>
</tbody>
</table>

NOTE – THE AMOUNT SHOWN DOES NOT REFLECT THE RESEARCH DISCOUNT RATE
Charges by Patient - Professional

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
Charges by Patient - Professional

This screen will appear after the Tx# is selected – Select the History Tab
Charges by Patient - Professional

### Transaction 29 Detail

<table>
<thead>
<tr>
<th>TR#</th>
<th>Svc/Dep Dt</th>
<th>Patient</th>
<th>Sta</th>
<th>Proced*</th>
<th>Departme*</th>
<th>Amount</th>
<th>S-P Due</th>
<th>Ins Due</th>
<th>Total Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>29</td>
<td>04/14/16</td>
<td>Doe, John</td>
<td>95782</td>
<td>MI SLEEP DISORDER LAB</td>
<td>659.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

### Combined Transaction History (Tx 29)

**Amount Charged to Research Account**
- 05/17/2016 02:47 AM Match: SP Adjustment 197.70 to bx 31, 1011-RESEARCH PAYMENT
- 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 bx 30, 5204-RESEARCH DISCOUNT

**Research Discount Applied**

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

### Clinical Research Billing

**CHARGE RECONCILIATION REQUEST FORM**

<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>MFIN</th>
<th>Study/Protocol</th>
<th>Visit</th>
<th>Date of Service</th>
<th>Item/Service</th>
<th>ProFre</th>
<th>CO/MEAP</th>
<th>Reason for Request</th>
<th>Specify your request from the drop down</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></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></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# (study) 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
Additional Useful Information

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
Helpful Resources

- CRAO and MBECT Website
  [http://www.med.umich.edu/medschool/research/CRAO.htm](http://www.med.umich.edu/medschool/research/CRAO.htm)
- Clinical Research Billing Guidance
- Charge Correction Request Form
- Frequently Asked Questions (FAQs)
- MBECT Training Manual & Other Related Information
- Research Request Account form (RMRN)
- MBECT Enrollment Report
Helpful Resources—cont’d

- The CRAO Chatter-newsletter
- CRAO-Mbect-help@med.umich.edu
- MBECT help desk- 764-KNOW (5669)
- http://www.med.umich.edu/i/michart/area/research.html
- CRBIssues-help@med.umich.edu
- MiChart-Research@med.umich.edu

– Research Application Coordinators
  • Exempt study creation (RSH) in MiChart