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Competency

Upon completion all users will successfully assign activity to their trial protocol, correctly provide comments, and successfully print their billing calendar.

Critical Behaviors

- Understand how to assign activity with appropriate designations
- Successfully add comments
- Understand how to print their billing calendar

This is geared toward study team members who are responsible for creating billing calendars for their study.

Users will be required to complete an attestation asserting they have viewed and understood the material.
Different ways to assign activity to a trial protocol
How to add comments to documents
How to print a billing calendar and MCRU schedule of events
How to address questions and concerns
Assign Activity to a Trial

Double click on the name “Clinical Trial” or single click on the icon in the Applications menu.
Assign Activity to a Trial

Find your study in the list by scrolling or by typing in the “Search” box. Highlight the name by clicking and then click on the “Edit” button.
Manage Activity

Once you have set up your views and or cycles and selected your items, you will need to assign activity to each item to create a billing calendar. Click on the “Activity” tab.

The “Show Startup” check box toggles whether the box for startup items appears at the bottom.

The “Grid Calc Method” drop-down allows you to choose which pricing method you would like displayed on the screen at any given time.

There are many ways to assign activity to your items. We will review them in the following slides.
Managing Line Items

To control activity at a line item level, double click on the item name in the grid.

If all visits are to be treated the same, use the "All Visits Are Same" tab. Use the drop-down menu to indicate whether an item is to be considered Study, Invoicable, Standard of Care, or Non-Billable. If you are not certain which designation is appropriate, please contact your CBOO manager for guidance.
The F/A check box toggles whether or not indirect costs (Facilities and Administration) should be applied to this item.
Add Comments

If you would like to add a note for this item, click on the yellow box next to the location where you'd like the comment to print.

Type your comment in the box that appears. Remember that you will need to provide a comment every time a service is marked as "Non-Billable". Include in your comment a reference to the page in the protocol that specifies why there is no charge for this service.
Managing Line Items

If the service is not the same across all visits click on the "Visit Activity Differs" tab.

Click in the "Type" cell to bring up the drop down menu. Use the blue boxes on the left to indicate on which visits activity occurs. Each data element may be separately designated on this screen.

When you are finished click "OK".
Managing Line Items

Your designated activity should now appear in the grid.
Manage Activity Individually

Individual items and visits can also be selected. Left click in the visit cell that corresponds to your service. Holding down the control key allows you to make multiple selections.

Once you have selected each item-visit combination, use the right-click button to bring up a menu. From here you can drag-and-drop items appropriately by left clicking on your choice in the menu.

Please note that the default activity in MEDIT is study. Selecting "Add Set to default" indicates that this service should be charged to the grant rather than the subject when it occurs.
Saving and Printing

Once you have all of your changes made, click "Save".

Once your calendar is complete, click on the "Print" button.

Choose which document you'd like to print and then click the "Print" button.

You may either open the Excel file here or choose to save the file to a location on your computer. Once you have made your selection, click "OK."
Choose a location on your computer where you would like to save the file and click “Save.”
Questions and Comments

Additional information is available on our website at: http://www.med.umich.edu/u/medschool-crao/mbect.htm

Or by contacting the help desk at CRAO-MBECT-help@med.umich.edu or 734-764-KNOW (5669).