Managing Items and Filtering

**Competency**

Upon completion all users will successfully add items to their protocol, correctly identify how to use the search criteria in the Condition Builder, and effectively manage item bundles.

- Understand how to add items to their trial protocol
- Successfully navigate the Condition Builder to find items
- Understand what a bundle is and how to manage it

**How much time will I need?**

**Who is the audience for this lesson?**

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

**What are the requirements?**

Users will be required to complete an attestation asserting they have viewed and understood the material.
Finding and managing items for a billing calendar for clinical trial items.

How to Address Questions or Comments
Add Items and Services to a Trial

Double-click on the name "Clinical Trial" or single-click on the item in the Applications menu.
Add Items and Services 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 Items

Click on the "Items" tab and then click the "Manage Items" button.

This brings up a list of protocol items.

Finding items can be one of the most challenging parts of building a calendar. If you are not sure which services should be included, please contact your CRAD analyst. If you have questions about which codes to pick, please contact CRADuser-help@med.umich.edu.

Note: You can always tell whether you already have a filter in place based on the button label.

When there is no filter you will be prompted to "Add Filter".

If a filter already exists, you will be prompted to "Edit Filter".
The Condition Builder

This brings up the Condition Builder. Each item on the list is a criteria by which you can limit your search results. We’ll explore these options in the next slide. To add a condition, use the mouse to drag and drop items from the “Column Name” window into the blank space on the right. You may have multiple criteria at the same time.

The screen will turn blue when you have it in the correct place. Let’s start with “Name”.

The Condition Builder

 Drag column from the list on the left into this box to create filter conditions.
The Condition Builder - Name

Name filters on the description of the item in the catalog.

Type your search term into the "VALUE(s)" box on the right.

Note: If you aren’t sure of the EXACT wording (including punctuation, abbreviations or spaces), you may want to switch the drop down to “Contains”, “Begins with”, or “Ends with”.

Notice that you can also exclude things from your search results by checking the “Exclude These From Result Set” box.

Once you are finished, click “OK” to return to the Condition Builder.
The Condition Builder - Category

Category filters on groupings of like services. These most frequently apply to hospital facility charges, which are prefixed with an “HC-” in the chapter.

Use the check boxes to indicate as many categories as you’d like. Once you are finished, click “OK” to return to the Condition Builder.
The Condition Builder - Bill Source

Bill Source describes the source from which the charge originates.

Use the check boxes to indicate as many sources as you'd like. Once you are finished, click "OK" to return to the Condition Builder.
The Condition Builder - CPT

CPT, or Current Procedural Terminology, is a set of nationally standardized procedure codes.

Type your search term into the “VALUE(s)” box on the right. Note: If you aren’t sure of the EXACT number you may want to switch the drop down to “Contains”, “Begins with”, or “Ends with”. Once you are finished, click “OK” to return to the Condition Builder.
The Condition Builder - Public

Public filters for items designated as global or set global in the填报者. Most items are marked as public so this is a good way to search for user-created items.

Use the check boxes to indicate whether "Yes" you'd like to include those items or "No", you wouldn't. Be careful about using the "Include Items From Result Set" check box, as well as the "Select All" or "Select None" buttons here because the logic can be confusing. Once you are finished, click "OK" to return to the Condition Builder.
The Condition Builder - Overhead

Overhead filters for items marked to include overhead in the chargebase, rather than on your specific calendar. This would only apply to user created items as no standard items are marked as such by default.

Use the check boxes to indicate whether “Yes” you’d like to include these items or “No”, you wouldn’t. Be careful about using the “Exclude These From Result Set” check box, as well as the “Select ALL” or “Select None” buttons here because the logic can be confusing. Once you are finished, click “OK” to return to the Condition Builder.
The Condition Builder - Startup

Startup allows you to filter for those items designated as startup items in the charger matrix. These items are often related to budget, such as an IRS fee.

Use the check boxes to indicate whether "Yes" you'd like to include these items or "No", you wouldn't. Be careful about using the "Exclude These From Results Set" check box, as well as the "Select ALL" or "Select None" buttons here because the logic can be confusing. Once you are finished, click "OK" to return to the Condition Builder.
The Condition Builder - Organization

Organization allows you to search by org name/security level. This is a good way to search for user created items. First, select whether you want everything stamped at a particular level or if you want to include everything below a particular level by using the drop down menu. Then click on the “Edit” button.

This brings up a tree to select a security level. You may not be able to see all the choices depending on your security rights.

Click on the level you would like and it will highlight in bold. Click “OK”.

Once you are finished, click “OK” to return to the Condition Builder.
The Condition Builder - Cost

Cost filters on the research price of an item loaded in the chargebase. Once you are finished, click “OK” to return to the Condition Builder.

Type your search item into the “VALUE(0)” box on the right.

Note: If you aren’t sure of the EXACT number (including decimal points) you may want to switch the drop down to “Contains”, “Less Than”, etc.

Once you are finished, click “OK” to return to the Condition Builder.
The Condition Builder - Item Favorites

Item Favorites pulls from user defined favorites. More information about managing these lists is available in our Item Favorites module.

Use the check boxes to indicate as many lists as you'd like. Once you are finished, click "OK" to return to the Condition Builder.
The Condition Builder - CDM

CDM stands for Charge Description Master. Also sometimes called an EAP, these are internal charge codes used to bill for services.

Type your search term into the "VALUE(s)" box on the right.

Note: If you aren’t sure of the EXACT number you may want to switch the drop down to "Contains", "Begin with", or "End with".

Once you are finished, click "OK" to return to the Condition Builder.
Removing and Editing Conditions

To remove a condition, use the mouse to drag the criteria from the right side back to the list and drop it.

You may add additional conditions. To edit a condition, double click on the name of the filter, in this case "Name".

Once you have all of your criteria, click the "OK" button.
Adding Items to a Protocol

The results of your search will appear on the left. Highlight the services you would like with the mouse and double click or use the “Add” button to move them to the “Chosen Protocol Items” side of the screen.

To make multiple selections, hold down the control key while clicking.
Managing Bundles

Bold items indicate bundles. These are predefined groupings of services that frequently occur together. You can see what is in a bundle by looking at the tree structure. This bundle includes an "HC-" charge for the hospital component of a service, and the "PO-" charge for the professional component.

Select a bundle by highlighting any part of it and using the "ADD" button.

If you don’t want all of the services in a bundle you may click on the relevant line item and then click the "Remove" button.
Back on the Protocol Items screen you may see what is in a bundle by clicking on the red plus sign.

Click "Save".
Questions and Comments

Additional information is available on our website at: http://www.med.umich.edu/umschool-cras/mbect.htm

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