Billing Calendar Overview

**Competency**

Upon completion all users will understand what a billing calendar is and why it is important, how to determine if a billing calendar is needed for their study, and understand what documents are required for billing calendar creation.

- What a billing calendar is and why it is important
- How to determine if a calendar is needed
- What required documents are used to help build a calendar
- How to address questions and concerns

**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.

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Overview of Billing Calendar

- What is a Billing Calendar?
- How do I know if I need one?
- What do I need to create one?

How to Address Questions or Comments
A Billing Calendar is a tool used to determine who is responsible for paying for each expected item/service provided to research subjects in a clinical trial.

A Billing Calendar lists the items/services, number of research visits, and notes which items/services are performed during each research visit.

A Billing Calendar categorizes billable events that a subject/patient is expected to receive during a research visit.

A Billing Calendar DOES NOT generate charges. It is only a guide of what charges you might expect. Putting a service on your calendar doesn’t mean it will get billed automatically.
MBECT Billing Calendars

Here is an example of what a calendar generated out of MBECT looks like:

<table>
<thead>
<tr>
<th>Task/Event</th>
<th>Description</th>
<th>Start Date</th>
<th>Start Time</th>
<th>End Date</th>
<th>End Time</th>
<th>Duration</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invoice Billing</td>
<td>Invoice Billing</td>
<td>Monday, May 23, 2022</td>
<td>1:00 PM</td>
<td>Monday, May 23, 2022</td>
<td>5:00 PM</td>
<td>4 hours</td>
<td>Billing</td>
</tr>
</tbody>
</table>

The steps within the MBECT application will vary by the program used in the Billing Calendar.
<p>How do I know if I need a Billing Calendar?</p>

- If you have billable items and services you will need a Billing Calendar.
  - Keep in mind that some labs drawn in research space will be analyzed in the regular clinical labs. Billing calendars help route those charges appropriately!

- If you aren’t sure, contact your CRAO Analyst for guidance!

**Diagram:**

1. How do I know what services get charged to MHMS LABS billing system?
2. If this charge is research?
   - If this charge is research, what is the research grant number?
     - If this charge is research, what is the research grant number?
       - Must the staff BG be filled out?
         - Billing calendar is required
       - No
         - Service is not charged
3. Service required?
   - Service is required?
You may find hints to the services you need to include in any of your core documents:

- Informed Consent
- Protocol
- Schedule of Events
- Budget
- Internal Budget (Feasibility)
- Sponsor provided Budget
- Contract

The services listed should match on all of these documents.
4. INFORMATION ABOUT STUDY PARTICIPATION

4.1 What will happen to me in this study?
During the study, you may make at least 5 visits and maybe up to 14 visits to the hospital/clinic. You will visit the hospital/clinic for two qualifying visits (screening and randomization), which may be conducted in some cases, and then again after three months, six months, every six months until the end of study.

Both as part of the study and as part of your routine medical care, certain medical procedures and tests will be performed at each visit.

Screening (Visit 1):
In the first visit, your doctor will explain the study to you. If you are interested to participate you will be asked to read this document and sign the informed consent form prior to starting any study procedures or testing.

1. Your doctor will ask you a few questions about your general health and your concomitant medications.
2. Your doctor will measure your blood pressure, your pulse rate, height and weight.
3. Your doctor will also ask you to walk for 6 minutes on a flat floor and make an evaluation of your shortness of breath in order to help us to evaluate your exercise capacity.
4. Your doctor will ask you to perform a test that measures the function of your heart (electrocardiogram).
5. Your doctor will take from your arm a small amount of blood (about 3 teaspoons) for complete clinical laboratory tests and a blood pregnancy test, in case you are a woman who is able to have children.
### Essential Ingredients Continued

The **Schedule of Events** from your protocol can be a great guide!

- Check for services and time points.
- Check footnotes for additional information.

#### Periods

<table>
<thead>
<tr>
<th>Visits</th>
<th>Screening</th>
<th>Randomization</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6, 7 etc.</th>
<th>Even</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Time Points</strong></td>
<td>Day 1 to -1</td>
<td>Day 1</td>
<td>Month 3</td>
<td>Month 6</td>
<td>Month 12</td>
<td>Every 6 months</td>
<td>2 weeks</td>
</tr>
<tr>
<td><strong>Assessments</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Informed consent</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical history</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cognitive/educational</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
| Vital signs, body weight | X | X | X | X | X | X | X
| 12-lead ECG | X | | | | | | |
| Complete laboratory panel | X | X | X | X | X | X | X
| LFT and PK sampling (serum) | | | Monthly (>1 week) monitoring | | | | |
| Pregnancy Test | X | X* | | | | | |
| Infectious disease | | | | | | | |
| Right heart catheterization | X, X | | | | | | |
| Modified WHO status | X | X | X | X | X | | |
| eGFR | X | X | X | X | X | X | |
| Borg dyspnea index | X | X | X | X | X | X | |
| PK sampling (serum) | | X | | | | | |
| QoL, questionnaires (Fr Fr) | X | X | X | X | X | X | |
| Study drug dispensing | X | X | X | | | | |

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* X: Mandatory
* X: Optional
A Billing Calendar is part of the trigger to route charges to the appropriate payer in MiChart.

Changes are billed to:

- Research Medical Record Number (RMRN)/Sponsor/7000 research account
- Subject's healthcare plan
- Subject
- Billing Calendar + Subject Enrollment

Billing Compliance And HAPPY PATIENTS
Questions and Comments

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

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