



Common Billing Tasks for Clinical Researchers

APeX

To set up a new study, email the Office of Clinical Research ([OCR](mailto:ocr@ucsf.edu)) at clinicaltrials@ucsf.edu.

After study start-up is complete and you have received an award number (study fund/COA/chartstring) all **new** APEX build requests (ZZ accounts) should be sent to the OCR at clinicaltrials@ucsf.edu. To **add a new CRC** to your study in both OnCore and APeX study builds, email OnCore@ucsf.edu and also place a routine IT ticket here: https://ucsf.service-now.com/ess/apex_requests.do.

Subject Enrollment Now in OnCore!

The study team must enroll all newly consented study subjects in OnCore within 24 hours of their consenting. Study teams must also track all their study visits in OnCore and ensure that all individual subject calendars are kept accurate and up to date. For more info: <http://officeofclinicalresearch.ucsf.edu/trackmore>



Upload Consent



Scan the full consent form and HIPAA and save file to UCSF Shared Network location/PHI drive. Then select Epic > Patient Care > Media Manager and select your patient. Click on Import and then select file. Description: Consent; Doc Type: Research Protocol.

*Consent uploads are **REQUIRED** for patients undergoing recurring research procedures at UCSF.*

Create and Pend Orders



Orders should be under existing encounters whenever possible, otherwise create an orders only encounter.

For outpatient: Under encounter: Go to EPIC > Patient Care > Encounter > Select Patient, select desired date, then Order Entry. Search for order and Accept. Be sure to click **Research Association** then Add **Diagnosis** (associate both Z00.6 and primary medical diagnosis). Then click **Pend Orders**. Then to send to provider for approval, click on **Follow-Up/Route**.

Please refer to **User Guide** for detailed steps of inpatient and outpatient instructions.

Link Encounters



Outpatient: EPIC > Scheduling > Appts > Select Patient. Under Future select correct encounter date and right click to select Reg Appointment Contact.

Inpatient: EPIC > Scheduling > Appts > Select Patient. Under Admissions select encounter and right click Registration.

Also complete **Study Visit Tracking** within OnCore.

This tip sheet should be used for reference only. Please complete available trainings and use the CRC **User Guide** for detailed instructions and any questions. For the User Guide and more information please see the **APEX Knowledge Bank**: <http://myapex.ucsf.edu/researchcrc>



Common Billing Tasks for Clinical Researchers

After visit billing tasks and study maintenance.

APeX

Monthly ZZ Report Review: You, or your department administrator/research finance analyst, will receive this PDF of all charges that have hit the research fund (ZZ account) each month. Work with your finance staff to:

1. Confirm COA/chartstring and funding source are correct (non-profit/industry)
2. Confirm the charges are correct patient/date/procedure

To look up past ZZ statements, go to EPIC > Enterprise Billing > Guarantor Account Maintenance > Statement History.

➤ **If your patient gets a bill in error, please email the Research Revenue Team: Erik.Morris@ucsf.edu**

Tasks To Do Weekly/Monthly:

- Regularly update patient visits and status as appropriate **in OnCore**
- **Update CRC** and staff on ZZ account via APeX ticket and also email OnCore@ucsf.edu
- **Update COA** by emailing Research Revenue: Sofia.Ferrer@ucsf.edu



To Do Before Study Closure:

When your study is complete and/or all billable procedures have been completed, you should **close out** the study in APEX.

Be sure that:

1. All patient status updated as off-study **in OnCore**
2. All billable procedures have occurred
3. Allow 30 days for all charges to be finalized. *This will assure no additional charges are routed.*

Once you have completed those steps please email Barbara.Maury@ucsf.edu to request the study be closed in APeX.

Other Useful Reports for CRCs:

- My research patients - simple REP0021183
- UCSF Find Patients Associated with My Research Studies
- All Research Studies for CRCs REP0059458

Important!

Obtain Copy of Coverage Analysis/Billing Grid



Make sure you have your billing grid handy when linking encounters and orders to your study! If you don't have access to OnCore or need a copy of the study billing grid, please email the **OCR** at clinicaltrials@ucsf.edu to request a copy for your files!

Amendments to Study Procedures

Often the study protocol will be revised and will require an update to the budget, IRB application, consent forms and/or coverage analysis. Please email the **OCR** at clinicaltrials@ucsf.edu to initiate any protocol amendments or modifications