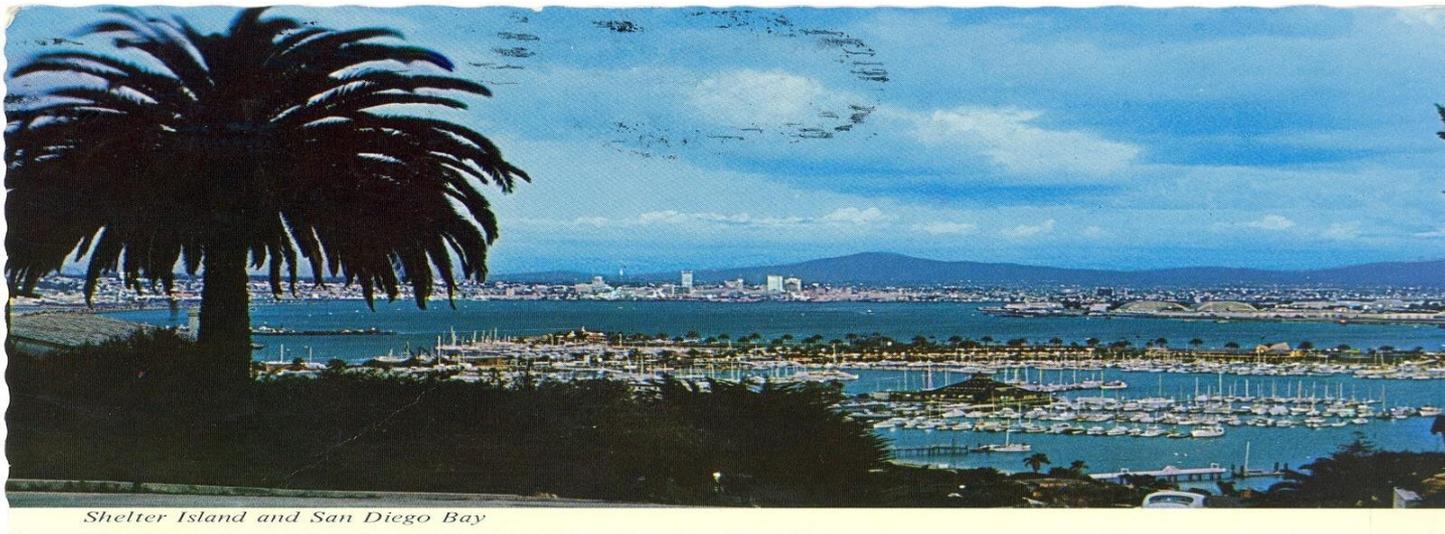


Encounter Linking Training
for Pilot 3.0
presented to
Moore's Cancer Center

August 8/24/18



Shelter Island and San Diego Bay

What is Encounter Linking

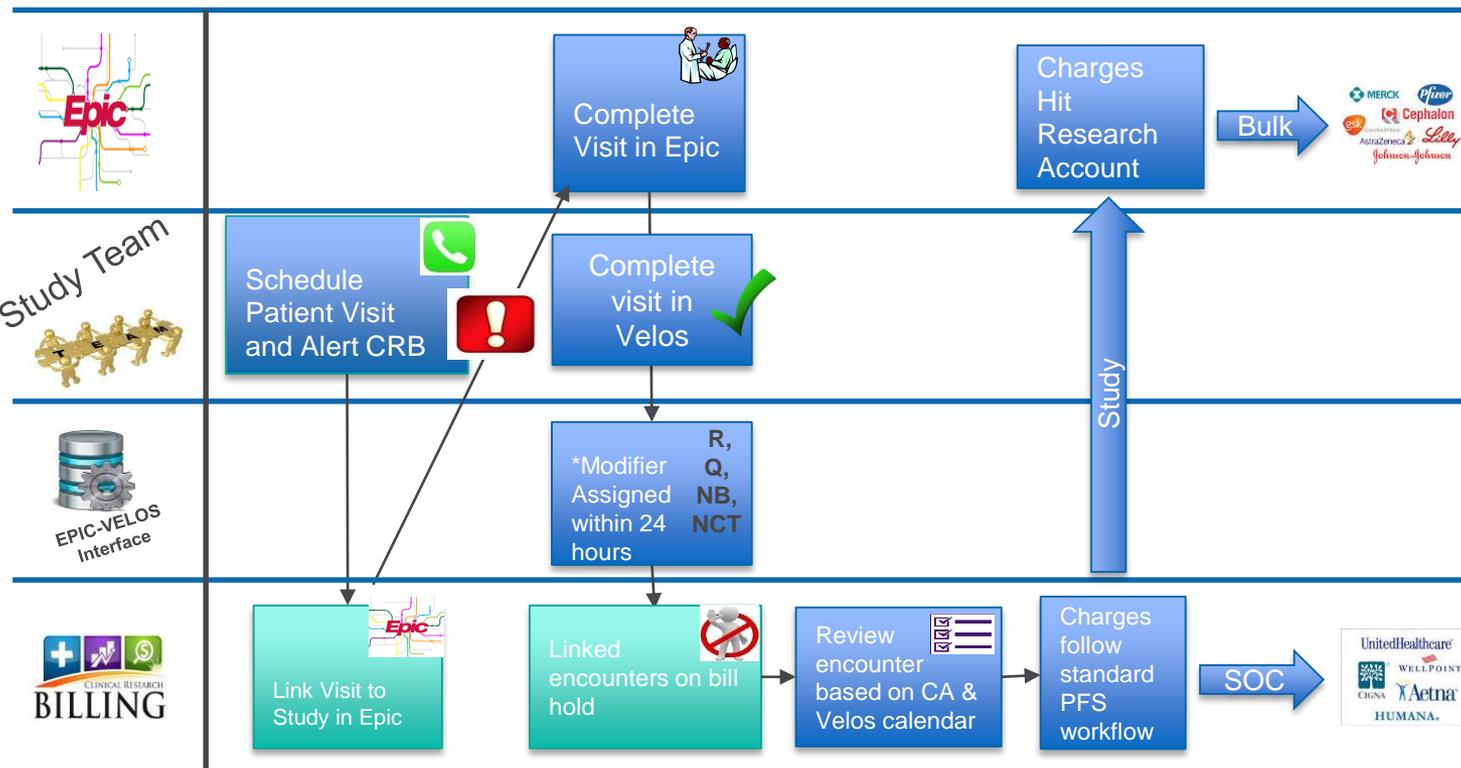
- Epic designed research billing functionality in 2009 version
- Encounter linking is the foundation in Epic for billing because it links the **Patient** to a **study** to a date of service (**charges**) creating an encounter
- A linked encounter is like a basket full of apples neatly compiled together where an unlinked encounter is like an avalanche of apples unorganized and everywhere



Benefits of Linking

If we link encounters...	Then we expect to...
Study teams no longer need to review Epic WQ 1914	Increase in CRC time for patient/study activities
CRB will see missing CPTs in the CA or duplicates due to the multi-flag	Decrease billing errors
Proactively review charges instead of waiting for coordinators to review after the charges post to the monthly research accounts	<p>Decrease errors before they file to the research account or patient/insurance and increase patient and study team satisfaction</p> <p>Decrease study team, CRB and PFS time and effort to rework billing errors and issue refunds</p>
Track and trend denials for research	<p>Decrease denials by 3rd party payers and increase revenue</p> <p>Provide data for future budgeting and CA development</p>
Secure pre-authorization for overall study participation	Decrease denials by 3 rd party payers and increase revenue
Track and trend billing data for research	Continue to improve processes

Future State Encounter Linking Process for Pilot 3.0



Where We Are Today with Linking Go-Live



- Linking Pilot 1.0 – Results of CRB Research Statements

- Before linking Research Statement Review on the 5 studies
 - \$68,949 in total charges with 101 billing route errors / 754 charges = 13.39%
- During linking Research Statement
 - \$79,303 in total charges with 31 billing routing errors / 917 charges = 3.38%



- Linking Pilot 2.0

- Security Access built, tested, and sent through change management process
- Conducted training with new departments in coordination with go-live dates
 - Shiley – 2/20/18
 - Cardiology – 2/27/18
 - Stem Cells – 3/12/18
 - 43 studies and 30 coordinators active in pilot 2.0



- Linking Pilot 3.0

- CRB does the encounter linking in Epic based on the “Expected Visit Date in Velos”
 - NAFLD Research Center = 2 studies
 - MCC = 3 studies: 171389; 130188; 180205 Go-Live is 8/15/18
 - MCC = 10 more studies + a few more cell therapy late August 28
 - Research Compliance and Internal Audit will assess and make recommendations based on audit findings from pilot 2.0 and 3.0

- Patient is on a specific study



- List of procedures patient will receive while on this study

1. Complete enroll/sign consent patient status in Velos

2. Assign a calendar/coverage analysis

4. Complete Velos

3. Ensure Scheduled Date is accurate



- Confirms test(s) were performed for:
- this patient;
- on this study;
- on this exact date



- Visit window expected date is the key to CRB Linking correctly
- Ensuring date is correct will ensure the visit will appear on Upcoming Visit Report in Velos



Patient Study Status: Off Treatment vs. Off Study

Off Treatment

Patient will no longer receive study drug, but is having follow up procedures or is in Survival Follow up

We're not done!

Off Study

No further contact with patient in relation to the study



- Updating to the correct status will help direct the service charge to the correct payor
- **Enrolled/Signed Consent** “Turns on” the CRB billing review process
- **Screen failure, Off Study and Survival follow up statuses** “turn off” CRB
This means no more charges will be held for research billing and will go straight to patient insurance/patient.

Key to Linking Success is
CRB knowledge of upcoming visits



2 Ways to Alert CRB to Link the Visit



Ensure Expected Visit Window is correct in Velos (current state)

Suggested Date	Scheduled Date	Event Window	Event
07/19/2018	07/18/2018 	-	MRI Breast, Lateral, Unilateral (w, w/o ... 
07/19/2018	07/19/2018 	-	Mammogram 
07/19/2018	07/19/2018 	-	US Breast 
07/19/2018	07/25/2018 	-	12 lead ECG 
07/19/2018	07/25/2018 	-	Heart ECHO 



CRB runs VELOS Expected Patient Visit Report

Current Page: Manage Patients >> Patient Schedules

Patient Search Enrolled **Schedule**

Search
Visits: Today Search

Matching Patient Schedules
Current Page: 1 Total Pages: 4
Rows Per Page: 25
Showing 1 - 25 of 97

Study Number	Patient ID	PL Study ID	First Name	Last Name	PL status	Visit Date	Visit	Visit Status	Assigned To	Principal Investigator
170883	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Active/On Treatment	08/03/2018	Cycle 1 Day 15		Francesca Lazzaro	Erin Roesch, MD
171389	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Active/On Treatment	08/03/2018	Day 3		Emma Bishop	Caitlin Costello, MD
121666	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Off Study	08/03/2018	Week 204			Rohit Loomba, MD
091629	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Off Study	08/03/2018	Post Chemo Visit 10			Irene Su, MD
121667	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Off Study	08/03/2018	Week 222			Rohit Loomba, MD
140423	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Off Treatment	08/03/2018	Week 185		Annette Feigenbaum, MD	Annette Feigenbaum, MD
160953	[Redacted]	[Redacted]	[Redacted]	[Redacted]	In Follow-Up	08/03/2018	Cycle 18 Day 15		Jacqueline Alm	Ezra Cohen
091629	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Off Study	08/03/2018	Post Chemo Visit 10			Irene Su, MD

Epic Dashboard for Linking

The screenshot displays the Epic dashboard interface. At the top, there are navigation tabs for various reports and a search bar. The main content area shows a report titled "Enrolled RSH patients - OPIAmb Future Scheduled Appointments (main) [7252586] as of Fri 8/3/2018 8:45 AM". A warning message states: "Not all results are currently loaded. Sorting and filtering apply only to the results that are currently loaded. It might take a moment to load the entire report." Below this is a table of patient appointments. A black circle highlights the first two rows of the table. A "Link to Study" dialog box is open in the foreground, showing a list of studies to link to. A large green checkmark is placed over the dialog box. The dialog box has "Accept" and "Cancel" buttons at the bottom.

Patient	RLink	Date	Enrolled?	Appt Time	CSN	MRN	Has Mult?	Enrolled Study	Department	Prov/Res	Appt Status	Type	Linked Participant ID	Linked
Adawi, Dean M		08/28/2018		9:00 AM	66041192462		Yes	080588,151093	SHI OPHTHALMOLOGY	PHOTOGRAPHY	Sch	COLOR PHOTO	35904	151093
		08/28/2018		8:20 AM	66041192087		Yes	080588,151093	SHI OPTOMETRY	MIZOGUCHI, LINNET	Sch	NEW OPTOMETRY	35904	151093
		08/16/2018		9:00 AM	66042512798		Yes	111298,110960	SRC FAMILY MEDICINE	HATAMI, ESMATULLAH	Sch	NEW PHYSICAL EXAM		
		10/19/2018		3:30 PM	66040607245		Yes	110960,111298,160394	USS PULM AND SLEEP ...	SHIVES, LISAJO	Sch	RETURN SLEEP PATIENT		

Linked	Study Code	Study	Status
<input type="checkbox"/>	111298	Nonalcoholic Fatty Liver Disease (NAFLD) Adult Registry	Enrolled/Signed Cons...
<input type="checkbox"/>	110960	Nonalcoholic Fatty Liver Disease (NAFLD) Adult - Database 2	In Follow-Up

2 Ways to Alert CRB to Link the Visit continued



Email: LinkIT@ucsd.edu with the following:

- Patient name, MRN and Date of Service
note: remember to add “secure” to subject line
- If Velos is update-to-date with expected visit windows, no need to email LinkIt



Other Ideas to Alert CRB to Link



- Add LinkIt@ucsd.edu to the **IDS** distribution list for study visits when patients receive study drug
- Email LinkIt@ucsd.edu with any **unscheduled** visits
- Email LinkIt@ucsd.edu when a **patient cancels appointment** (with the new rescheduled date in order for CRB to relink)
 - If patient **reschedules an appointment without canceling**, the link will remain on the encounter so you don't need to email LinkIt
- Email LinkIt@ucsd.edu if pending CA **amendments**
- Email LinkIt@ucsd.edu for **adverse events** processing
- Email LinkIt@ucsd.edu if you don't have **time** to update the expected visit window in Velos

Summary

- Pilot 3.0 success depends on CRB knowledge of upcoming scheduled visits.
- CRC to alert CRB of upcoming visit either by maintaining Velos (current state) or by emailing the LinkIt box.
- For questions or concerns, CRB can be reached at CRB@ucsd.edu from 5:30am until 4:30pm M-F.
 - Copy Marie at doj006@ucsd.edu if urgent
- CRB will huddle with study teams weekly after go-live for the first 3 weeks via Zoom meeting to resolve issues or answer questions.
Date/time TBD

