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

August 8/24/18

Shelter Island and San Diego Bay

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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
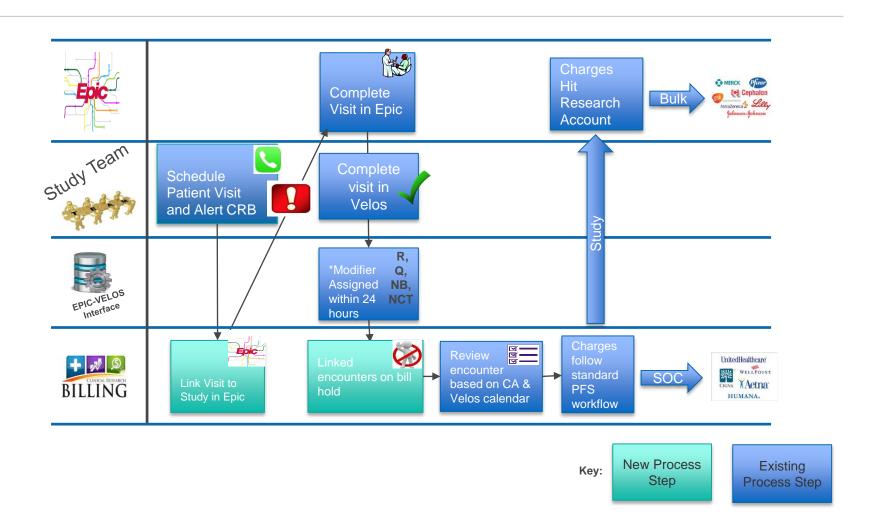
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Benefits of Linking

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	Decrease errors **before** they file to the research account or patient/insurance and increase patient and study team satisfaction Decrease study team, CRB and PFS time and effort to rework billing errors and issue refunds
Track and trend denials for research	Decrease denials by 3rd party payers and increase revenue Provide data for future budgeting and CA development
Secure pre-authorization for overall study participation	Decrease denials by 3rd party payers and increase revenue
Track and trend billing data for research	Continue to improve processes

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Future State Encounter Linking Process for Pilot 3.0

Key: New Process Step | Existing Process Step

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Where We Are Today with Linking Go-Live

- **Linking Pilot 1.0 – Results of CRB Research Statements**
  - <u>Before</u> linking Research Statement Review on the 5 studies
    - ➤ $68,949 in total charges with 101 billing route errors / 754 charges = *13.39%*
  - <u>During</u> 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**

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- **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

- **Confirms test(s) were performed for:**

- **this patient;**
- **on this study;**
- **on this exact date**

4. Complete Velos

3. **Ensure Scheduled Date is accurate**

- **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**

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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

That's Done!

- **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.**

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Key to Linking Success is
CRB knowledge of upcoming visits

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2 Ways to Alert CRB to Link the Visit

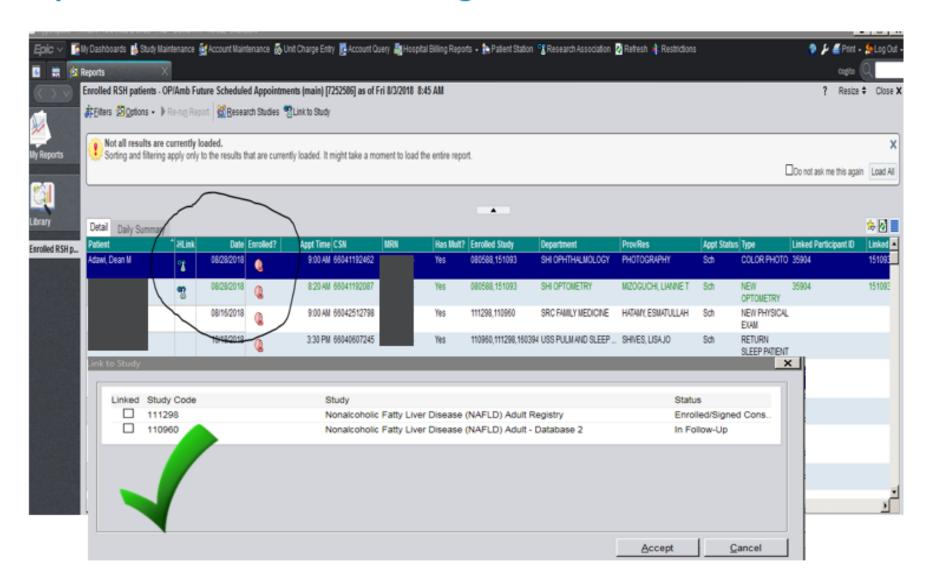 Ensure Expected Visit Window is correct in Velos (current state)

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 📎

LinkIt!

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CRB runs VELOS Expected Patient Visit Report

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Epic Dashboard for Linking

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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

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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

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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

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