



Research Billing Number

User Guide

November 8, 2010

Research Billing Number - User Guide

The Clinical Research Billing Number (RBN) request system provides a structure to track the request, view historical requests, and update account information on the study.

UPHS requires the RBN in order to register & schedule patients, post research charges, and invoice for the research payments. In order to request a RBN, the clinical study must have an approved IRB protocol, as well as, Business Office approval prior to UPHS set up.

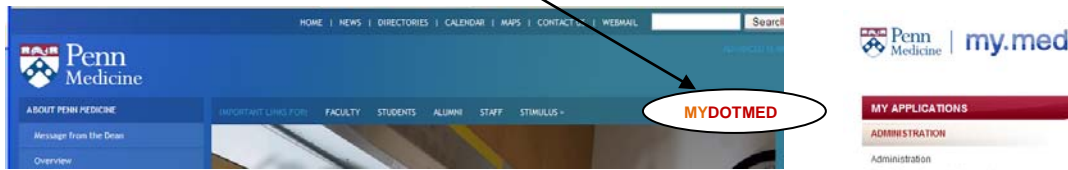
RBNs are required for those clinical research studies utilizing UPHS services and when payment is from a funding source in the School of Medicine. Research studies billing 100% of routine care to the subject third party insurance carrier do not need a RBN. Services provided for research from School of Medicine Service Centers do not need RBNs.

This guide covers the following:

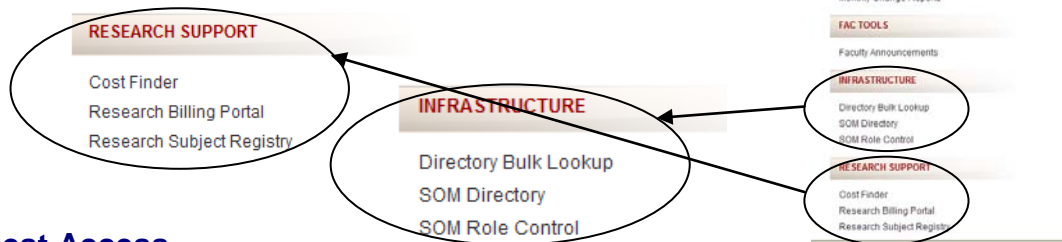
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User Log-in

RBN request can be found from your **MYDOTMED** portal on the School of Medicine web site: www.med.upenn.edu.



After you log in using your PennKey and password, you will see the **RESEARCH SUPPORT** section as one of the MY APPLICATIONS. Within the application you will see **Research Billing Portal**. If you do not see **Research Billing Portal** listed on your **MYDOTMED** portal, then you do not have access.



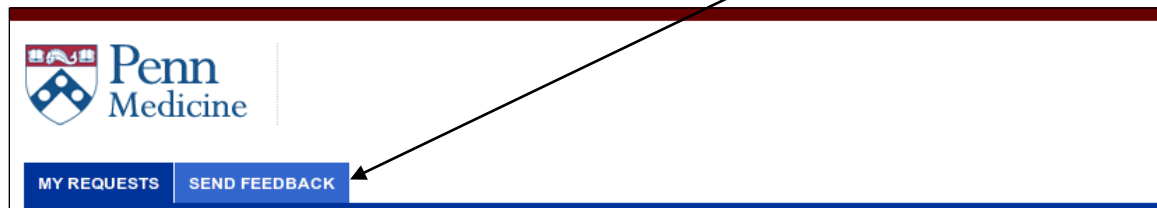
Request Access

Your Business Office can grant you access to the Research Billing Portal. The Business Office can grant access to Clinical Research Coordinators or Grant Managers for their secured ORG codes. The Business Office will need to access "SOM Role Control" from the **MYDOTMED** portal in the School of Medicine web site: www.med.upenn.edu and assign CRCs their role.

System Overview

The view of the system depends on your individual role. All of the views are very similar; however, your access will determine the blue tab headers shown on your page. In the example below, we are showing the view for a Clinical Research Coordinator.

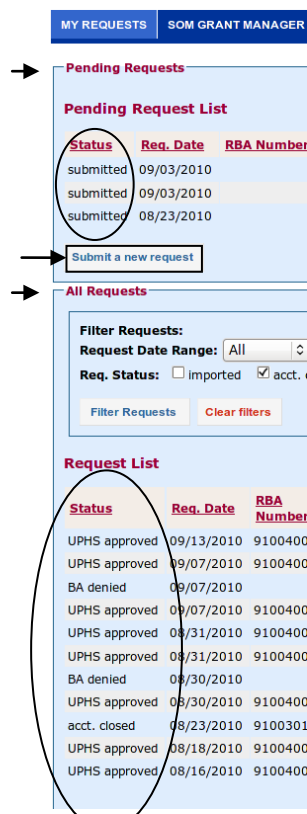
The second tab “SEND FEEDBACK” is available for all to send feedback on possible bugs in the system, problems with the data or to share your comments. The system will automatically send your feedback to a team of experts to be addressed. We encourage you to use the “SEND FEEDBACK” tab as often as you need.



The initial screen has two sections: **Pending Requests** and **All Requests**. **Submit a new request** can be found in the Pending Requests section at the top of the screen.

Pending Requests section displays all requests pending completion: submitted or BA Approval. You can view the details of the request at any time by clicking on the [study name](#).

All Requests section displays all historical requests based on your access level. You can view the details of the request at any time by clicking on the [study name](#). Certain fields of the historical requests can be updated by individuals with the Grants Manager role. If you need to alter one of the restricted fields, please use the [Send Feedback](#) to request a change to an existing RBN.



Request for RBN can have one of the following electronic **Status**:

- Submitted: Research team has submitted a request for a clinical RBN based on an approved IRB protocol. The request is submitted to the Business Office for funding verification.
- BA Approval: The Business Office is responsible to enter a 26-digit funding source to pay for the services provided by the health system. After approval, the request is submitted to UPHS for creation in the many billing systems.
- UPHS Approved: UPHS has identified key offices across all three hospitals to be responsible for creating a clinical RBN in IDX, SMS, Cerner and HUP IDX-RAD. After the responsible individuals have completed the initial set up, the status is changed to “UPHS Approved” and an email notification is sent to the Research Team and Business Office alerting them of the RBN.
- BA Denial: The Business Office denied the request from proceeding to UPHS. There could be several reasons for the denial. The Research Team and Business Office should communicate the rationale for the denial.
- Acct. Closed: The Research Team and Business Office has determined the study has ended and no additional services are required from UPHS and RBN is closed. This number can no longer be used.
- Imported: Historical RBN imported into the portal for tracking proposes.

Tips: View and access are determined by your role and ORG security. Most views are similar in nature. If you cannot find what you are looking for please hit “Send Feedback” tab, at the top right.

Requesting a NEW Research Billing Number

Submit a new request: A new request may be submitted by the CRC or Grants Manager role.

To submit a new request:

1. Click on “submit a new request” in the Pending Request.
2. Select one or more providers necessary for your study.
3. Start slowly typing your approved IRB protocol number and select from the drop down list.
4. Complete the required additional information – see below.
5. Hit submit to forward your request to the Business Office for assigning a funding source and approval.

Pending Request List

Submit a new request

MY REQUESTS
SEND FEEDBACK

Research Billing Account Request

Please note: Items with asterisk * are required.

Service Information

Services will be provided at: (Select one or more.) *

HUP

PPMC

PAH

HUP Department of Radiology

Pathology and Laboratory Medicine William Pepper Labs

Study Details

IRB Protocol *
 Begin by entering at you tried to enter.

Study Name *
 25 characters or less

Study Start Date *
 mm/dd/yy

Study End Date *
 mm/dd/yy

Enrollment End Date *
 mm/dd/yy

UPCC Number
 Cancer Center Members on

Contact Information

Results to *
 lastname, first

Bills to *
 lastname, first

Required fields on the [Submit a NEW Request](#) screen are as follows:

Study Short Name: Short name for the study. This field is limited to 25 characters in length. This name will be used in the IDX case management system.

Study Start Date: Enter the projected date for enrollment to start.

Study End Date: Enter the projected date that the study will finish (i.e. all research data analysis completed).

Enrollment End Date: Enter the projected date that the study enrollment will finish (i.e. all subjects have been enrolled and all study visits completed).

Responsible Coordinator (box not shown): The requester is defaulted as the Responsible Coordinator. The Responsible Coordinator is the primary contact for all questions, including the approval of bills. Only the Business Office can change this field.

Results to: This is the individual for the ancillary department to send paper results to, if necessary.

Bills to: This is the individual for patient accounting to send paper bills for PMC, PAH, CPUP and inpatient invoice not included in the electronic billing process. ALL invoices in the electronic process go to the CRC identified and the Business Office. You do not have to put the BA here.

Tip: Contact Information: Type SLOWLY, stopping at the first three letters of the last name, then proceed after you see the computer recognize the name.

NEW: Six digit study nickname is no longer necessary. HUP Radiology will start to use the 6 digit IRB protocol number as the Radiology ID for all new RBNs established electronically.

Business Office Approval

The Business Office (BO) approval of all requests provides assurances that a funding source is available to pay for the services provided by UPHS. The Business Office can update all fields of a request even after it has been approved. Your Department/Center or Institute determines the studies you are permitted to access.

The following steps are necessary for the Business Office to approve a new RBN:

1. Click on [study name](#) button from your Pending Request List.
2. Check all required information. BO can change the responsible coordinator, if necessary.
3. Complete the 26-digit account information & validate the 26-digit account.
4. Submit for approval or reject the request.

Responsible Coordinator

The Business Office can update the Responsible Coordinator for the study at any time. Responsible Coordinator is the primary contact for all questions, including approval of bills. System defaults to the individual requesting the RBN as the Responsible Coordinator.

Account Information

The Business Office is responsible to validate all 26-digit accounts and ensure they are active throughout the life of the protocol. All future posting of Clinical Research Invoices will be based on the 26-digit account in the portal.

If the protocol is linked to an institution number the awarded 26-digit account will be populated. The BO can change the 26-digit account at any time.

The Business Office is responsible to update any changes to the 26-digit account, including **Closing this account** when necessary.

Reject Request

The Business Office can reject a request for any reason. After you click on the “Reject” button you can type a message to the requester describing the reason for rejection.

Caution: If you are aware of a Pending RBN request, but, you do not see the request in your queue, please use the [Send Feedback](#) tab. In your [Feedback](#) please identify the protocol # and Investigator to which you need access.

UPHS Approved

The Health System has identified several key individuals to create the RBN in the many billing systems.

1. Click on [study name](#) for the RBN awaiting your approval.
2. Complete the appropriate box (either y/n or the code).
3. Click submit.

Request Details	
Services will be provided at:	• HUP Radiology
IRB Protocol Number:	809298
Study Name:	A5260s, Substudy of A5257
Study Start Date:	Feb 27, 2009
Study End Date:	Mar 1, 2014
Enrollment End Date:	Mar 1, 2011
UPCC Number:	n/a
Results to:	QUINN,JOSEPH H (joseph.quinn@uphs.upenn.edu)
Bill to:	QUINN,JOSEPH H (joseph.quinn@uphs.upenn.edu)
Responsible Coordinator:	QUINN,JOSEPH H (phone# in online Directory: 215-349-8)
<input type="button" value="Change Responsible Coordinator"/>	

Account Information	
Primary Investigator	TEBAS,PABLO
Account *	<input type="text"/> 26 digit accou
<input type="button" value="Validate this 26 digit account number."/>	
Project Title *	<input type="text"/>
Expiration Date *	<input type="text"/>
<input type="button" value="Submit"/> <input type="button" value="Reject"/>	

UPHS Information	
RBA Number	<input type="text"/>

RBN Request List

All Requests section displays all historical requests based on your access level. You can view the details of the request at any time by clicking on the **Study Name**. **Study Name** is a hyperlink to the detail page.

The screenshot displays two panels from a web application. The left panel, titled 'All Requests', contains a filter section with 'Request Date Range' (set to 'All'), 'RBA Number' (input field), and 'Req. Status' (checkboxes for imported, acct. closed, BA approved, BA denied, UPHS approved). Below the filter is a 'Request List' table:

Status	Req. Date	RBA Number	Study Name
UPHS approved	09/13/2010	910040062	CYPRESS
UPHS approved	09/07/2010	910040054	REPAIR
BA denied	09/07/2010		Relax

An arrow points from the 'Study Name' 'CYPRESS' in the table to the 'Request Details' panel on the right. This panel shows details for a request, including 'Services will be provided at' (HUP, HUP Radiology), 'IRB Protocol Number: 611452', 'Study Name: IRASE', 'Study Start Date: Oct 4, 2010', 'Study End Date: Oct 4, 2015', 'Enrollment End Date: Oct 4, 2010', 'UPCC Number: n/a', 'Results to: GNAP, MARY M. (gnapm@uphs.upenn.edu)', 'Bill to: RYNN, BRENDA I. (brenda.rynn@uphs.upenn.edu)', and 'Responsible Coordinator: GNAP, MARY M. (phone# in online Directory: 215-349-8446)'. It also includes 'Account Information' (Business Administrator: 40042274, 26 Digit Account: 6533428022984) and 'UPHS Information' (RBA Number: 91004, SMS/IDX Approved: Oct 4, 2010, Radiology Approved: Pending Approval).

The Grants Manager Role can update certain fields in historical requests. If you need to alter any restricted fields, please use the **Send Feedback** to request a change to an existing RBN.

Searching or Filtering on Existing RBN

You can sort or filter historical RBN requests within your access rights. Your Department, Center or Institute determines the studies you are permitted to have access. If you feel you need additional access please contact your Business Office.

In the **All Requests** section you can filter your search criteria or type in one RBN, ORG code or PI's name.

The screenshot shows the 'All Requests' filter section. It includes a 'Filter Requests:' header, a 'Request Date Range' dropdown menu (set to 'All'), and input fields for 'RBA Number', 'Org Code', and 'PI Name'. Below these are checkboxes for 'Req. Status': imported, acct. closed, BA approved, BA denied, and UPHS approved. At the bottom are 'Filter Requests' and 'Clear filters' buttons.

Request can be filtered based on initiation date of the request by selecting the drop down arrow. The date range options include: ALL, 3, 6, or 9 months ago. Another option is to uncheck one of the boxes based on the Request status: **imported**, **acct. closed**, **BA approval** or **UPHS approved**. By un-checking the box and clicking on the "Filter Requests" button you limit the results showing on the page.

To clear all filters click on the "Clear filters."