UF Research Budgeting and Pricing Tool
User Guide

Made possible by the collaborative efforts of Shands Healthcare, University of Florida Physicians & the University of Florida
UF Research Budgeting and Pricing Tool User Guide

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When to Use the Tool?

For UF research studies that begin after September 26, 2010, Shands Healthcare and University of Florida Physician (UFP) services receive a discount based on the Medicare rate on date of service. The Tool was designed to assist faculty and staff during the early stages of budget analysis by providing a convenient and efficient way to obtain a Medicare cost estimate for simple, straight-forward research services when the CPT code and location is known. You will no longer need to send an inquiry and wait for a Confirmation of Service from ancillary departments in this situation. You will be able to find the answer yourself within minutes, on your own computer, and at a time that is convenient to you.

For general outpatient research-funded services, proceed to the UF Research Budgeting and Pricing Tool to obtain a price estimate. You will need to know and enter the CPT code\(^1\) and planned service location to obtain an accurate pricing estimate.

If you are not sure which CPT code to use for a service, please contact the ancillary/service providers for clarification or confirmation before using the tool.

When NOT to Use the Tool?

Although the Tool was designed for convenience and efficiency, it does have specific limitations. It is important that it be used only when the correct CPT code and location are known with certainty. This will avoid unanticipated errors that may cause unexpected increased costs. Remember, the Tool only provides an estimated study cost at the time you use the Tool; the study will be charged for the actual service that is ordered, and the cost will be the Medicare rate applicable on the day the service is rendered. Also, the list price in the Pricing Tool is ONLY a calculated estimate based on the Medicare rate. If you need the actual list price, contact the COS ancillary contact.\(^\)\footnote{In addition, there are some other situations where the Tool should not be used, and the standard Confirmation of Services process should be followed instead.}

If your study involves research-funded services meeting the following criteria, DO NOT USE THE TOOL. Instead, please contact the service providers directly to obtain research price estimates, following their instructions for the Confirmation of Service (COS) process. Ancillary/service provider contact information may be found on the Shands & UFP Contacts page of the RAC website.

The tool may NOT be used for:

- Inpatient stays: For research-funded inpatient stays, contact Theresa O’Connell at oconta@shands.ufl.edu or 352-265-7965 ext. 86465 for Technical Fee price estimates and the individual UFP department(s) for Professional Fee price estimates.
- Implantation and explanation of investigational devices or PMA/510k carotid artery stenting: Contact Theresa O’Connell and the individual UFP department(s) for price estimates.

\(^1\)Not all services related to CPT codes listed in the Tool can be performed by Shands or UFP. If you are not sure if a specific service/test is provided by Shands or UFP, please verify with the ancillary department or clinic before using the tool.

To see a complete list of lab tests performed by Shands, you can log in to the Shands Portal, click on the Services menu (near the top left corner on the page) > Clinical > Clinical Laboratories, then click on the Laboratory Tests menu on the left.
- **Complicated services**: For complicated services or procedures (e.g., surgical procedures; services involving more than one code such as ECGs), obtain a COS from the ancillary/service provider. Forward the COS to Theresa O’Connell and the individual UFP department(s) for price estimates.

- **Pathology services**: For pathology services/procedures (e.g., biopsy tissue or slides), follow the UF Laboratory/Pathology instructions to obtain a COS.

- **Cytogenetics services**: For Cytogenetics services, request a COS from Brian Gray via e-mail (grayb@pathology.ufl.edu). Complete the COS form and return it to Brian with a copy of the protocol.

- **Investigational Drug Services and Non-investigational pharmacy services**: For investigational drug and non-investigational pharmacy services, click here and follow the Investigational Drug Services (IDS) instructions to obtain a COS form.

- **UF-CRC services**: For services performed at the UF Clinical Research Center (UF-CRC), use the UF CRC Request for Services Form.

- **Services not found in the Tool or any service with multiple options for codes where you are uncertain which code to use**: Obtain a COS from the ancillary/service provider. Forward the COS to Theresa O’Connell and the individual UFP department(s) for price estimates.

- **Innovative procedures or services not previously performed at UF or Shands**: Contact Theresa O’Connell and the individual UFP department(s) for price estimates.

- **Services not performed at UF or Shands**: Contact the outside service providers directly for pricing.

- **Shands “sendout” labs**: Follow the UF Laboratory/Pathology instructions to obtain a COS.

### Access the Tool

Navigate to [https://ctsit-projects.ctsi.ufl.edu/cmspricing/](https://ctsit-projects.ctsi.ufl.edu/cmspricing/) to access the Tool. Login is NOT required.

Please note that access to the tool is restricted to UF and Shands networks. If you are off-campus, please use the [UF VPN service](https://www.ufl.edu/it/networking/remote-access) or the [Shands VPN service](https://www.shands.com/mysshands/) to access the Tool.

### Understand Estimated Prices Provided by the Tool

The Tool provides both estimated List Price and estimated Medicare rate for research budgeting purpose.

<table>
<thead>
<tr>
<th>Estimated List Price PRO</th>
<th>Estimated List Price for professional fee^2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated List Price TECH</td>
<td>Estimated List Price for technical fee^2</td>
</tr>
<tr>
<td>Estimated Research PRO</td>
<td>Estimated Medicare rate for professional fee</td>
</tr>
<tr>
<td>Estimated Research TECH</td>
<td>Estimated Medicare rate for technical fee</td>
</tr>
</tbody>
</table>

^2 The Estimated List Price in the Pricing Tool is ONLY a calculated estimate based on the Medicare rate. If you need the actual List Price, please contact the COS ancillary contacts.
Researchers are encouraged to use the estimated List Price or actual List Price when building the budget to ensure sufficient funding for the study. Note: Industry sponsors should be paying as close to List Price as can be negotiated (NOT Medicare estimate).

If the **actual** List Price is needed, researchers must contact the service providers directly through the COS process.

### Create a New Pricing Grid

Click on the **GENERATE** button on the screen.

A blank pricing grid will appear. You can start a new session here.

You may find that the pricing grid is wider than the screen and you have to scroll right to see the rest of it. To shrink the page, you can use the ‘Zoom’ function of your browser to resize it. You can use ‘Zoom
Out', select a percentage, or click on ‘Custom...’ to set a custom percentage to scale down the page. See example below for Internet Explorer 8.

Number of Time Points and Procedures

Enter number of time points and procedures, and click the **RESET** button.

The pop-up window below will appear. Click OK to continue.

Or, if you leave both fields empty, you can begin with a default 3 x 3 pricing grid. **Note: the pricing grid must consist of at least one Time Point column and one row.** You can, however, leave all the Time Point columns or any unused rows blank. You can always add/delete time points and procedures later.

Please note that the price schedule will always be automatically set to the most current version.
Follow a Top-Down and Left-to-Right Order

Begin by entering a protocol-required service from the first row. Please note that a subsequent row will only be properly activated after all rows above are completely filled out. Inside each row, required fields need to be filled out sequentially from left to right. Note: The pricing grid must be completed in a top-down, left-to-right order.

Enter Protocol-Required Services

Billed To

Start with the Billed To column. You can hover your mouse pointer over the header to get the list of options for this field:

When you type in a valid option in the Billed To field, a pop-up window will appear with a description. See the example below. You must wait until the pop-up appears and then click on the pop-up, or hit the Tab key to enter the value into the field.

Location

After the Billed To field is filled out, tab over or move your cursor to the Location field. To view a pop-up list of all available locations, you can click on the Location header.

You can enter the location by typing any part of a location name, and a narrowed list will pop-down for you to make a selection:
Use your cursor or use the Down Arrow key to click on your ‘Location’ to select it:

**Procedure**

Once you have selected your ‘Location’, you can tab over to the **Procedure** field. You should enter CPT codes in the **Procedure** field. Start typing a code, and the pop-down list will narrow as you type more characters:

Once you select a ‘Procedure’, the Short Description and Prices will auto-fill.

You may add a comment in the **Comments** field if you wish.

**Time Points**

Select the **Time Points** for which this procedure applies by checking the corresponding checkboxes. The default procedure volume is 1. You can increase it to more.
You can also customize the Time Point headers by overwriting the default values. See the example below.

Repeat this procedure to add protocol-required procedures for as many rows as you need. Please note that you have to complete all fields (except the Time Points) in one row before you can start working on the next row. Rows below any incomplete line will not be properly activated.

**Add Time Points and Rows**

You can add Time Points by clicking on the **Add TP** button and add rows by clicking the **Add Row** button. There is no limit to the number of time points and rows that you can have.

**Delete Time Points and Rows**

If you need to delete a time point or a row, click the appropriate button as shown here:

Please note that the pricing grid must consist of at least one Time Point column and one row. Therefore, you will not be able to delete the first Time Point column or the first row. You can, however, leave all the Time Point columns or any unused rows blank.
Billed To Options and More

<table>
<thead>
<tr>
<th>Billed To</th>
<th>Location and Procedure (e.g. CPT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you select <strong>S</strong></td>
<td>You must choose a valid location from the location list and also a CPT code available from the CPT code list.</td>
</tr>
</tbody>
</table>
| If you select **M**, **C**, **MQ0**, **MQ1**, or **NB** | 1. You can choose a location from the location list and **must also** choose a CPT code from the CPT code list. **Or** 2. You can enter free text in the Location field and **must also** enter free text in the CPT or Short Description field. See the example below. **Note:** If the location is chosen from the list, you cannot enter free text in the Procedure field. Similarly, if free text is entered in the Location field, you will not be able to choose a CPT code listed in the Tool.

Standard of Care and Study-Funded

If your study has a service where the non-standard of care visits are paid by the study and standard of care (SOC) visits are billed out to a third party payer/patient, you should **list the SOC and study-funded visits on different lines**. See example below.

Professional Fee (Pro Fee) Reading Exception

If you have a “Reading Exception” where the associated professional fee will be waived, you can overwrite the **Basic Pro Fee** field.

When you do, a pop-up reminder, “Please add a comment to explain the change in Fee”, will appear to notify you to add a comment.
When you click the OK button in the pop-up window, the **Comments** field will be highlighted in red. An explanation is required. Please note that the Comments field will stay highlighted even after an explanation is entered.

### Procedures Requiring Multiple CPT Codes

Since 2014, when office outpatient visits are planned at hospital outpatient clinics, in addition to using the E&M codes (992xx) for the professional fees, study team must also use G0463 for facility charge estimates.

There are tests/procedures that require multiple CPT codes to be used together. A 12-lead ECG is an example. For these types of services or procedures, we strongly recommend that you consult the ancillary/service provider to find out all the codes that may apply before you use the Tool.

### Different Procedures Using the Same CPT Code

You might come across a CPT code that applies to several different services/procedures. An example is CPT code 88399. It is used for several different types of tissue processing: processing only - core punch biopsy; processing only - retrieve block; processing only; section and stain 1 H&E; section unstained; processing only - release block. In order to distinguish between these different items, you should add the specific service/procedure to the Comments field.
Export the Pricing Grid

Once you have completed a pricing grid, you may export it to a CSV file in order to use the exported file in place of a COS with the RAC submission and so that you can copy and paste relevant sections into your budget and billing grid templates. The export can be done via e-mail or by saving the file to your preferred location.

Click on the Export button in the lower left corner of the screen.

![Export button](image)

A new export section will be displayed below the Export button.

**Export without E-mail Option**

In the export section, you can click the Save button to save the file to your preferred location.

![Save button](image)

A popup window will open and you should see a browser dialog asking what you would like to do with the file. Depending on the browser you are using, the pop-up window and the browser dialog might be slightly different. Below is an example of the pop-up window that appears in Internet Explorer 8.
You can click the Open or Save button to view the file, or save the file to your local drive. The output file will be named using today’s date (in the format of YYYYMMDD) followed by the latest Medicare rate fee schedule (in the format of year and quarter).

Please note that files exported on the same day will all be named the same. If you export more than one file in the same day, be sure to close the previously exported file, since it will not allow you to open the file with the same name. If you are planning to do multiple exports on the same day, rename and save any previously exported file you plan to keep to prevent it from being overwritten by the new export.

If you plan to import the file back into the Tool in the future, be sure to save it as a CSV file.

Export with E-mail Option

If you want to have a copy of the export e-mailed to yourself or someone else, check the ‘Email To’ box, enter an email address and an optional e-mail subject. A brief comment (optional) may be added to appear in the body of the e-mail. Click ‘Save and Send’ button.
A pop-up window with the browser dialog will appear as shown in the section above. You can open or save the CSV file, following the instructions above. In the meanwhile, a copy of the CSV file will be automatically emailed to the address provided. If you want to email the exported file to another person/email address, you can change the email address and click ‘Save and Send’ button again.

**Revising Pricing Grid after Export**

After export, you can validate what is in your exported file against what is on the screen. If additional changes are needed, you can go back to the pricing grid on the screen to make necessary revisions, and export the revised pricing grid out again.

You can always start building a new Pricing Grid by entering the number of time points and procedures and clicking the **SUBMIT** button on the screen.

![Pricing Grid Interface](image.png)

**Submitting Pricing Tool Output to RAC Office**

For study-funded services with which the study team is familiar (i.e., the study team has had experience with both the specific services, the service provider, and is absolutely certain of the CPT code and location of the service), the UF Research Budgeting and Pricing Tool output may be used in place of the standard Confirmation of Service (COS) form. There is no specific requirement on the format of the Pricing Tool output file. Study teams can submit image files containing screenshots, Excel Spreadsheets, or PDF documents, as long as the content is legible.
Import a Pricing Grid

CSV File for Import

The Tool uses comma delimited CSV files to import pricing grids.

- The import interface will not recognize files in any other format including Excel (.xls or .xlsx file). If you have a previously exported pricing grid in an Excel file format, you must re-save the Excel file into a CSV file first.
- The import interface will interpret a comma in a CSV file as a delimiter to separate two data fields. If you try to edit a previously exported .CSV file before import, you must avoid using commas in the import file.

Import a Pricing Grid and Update Prices

If you have a previously exported pricing grid (must be in .CSV format) that you want to edit, you can start by importing the old file through the import interface. There are two ways to access the import interface.

1. From the Tool cover page, click on the **IMPORT** button.

2. From the “Generating Grid” page, click on the **IMPORT** button in the top left corner.
The Import interface will appear.

Click the **Browse...** button to locate a previously exported .csv file³. Once you have your file in the input field, click the blue **Import** button.

See a sample CSV file below (file is open in Microsoft Excel).

³ Please note that the file you are trying to import must be in the CSV file format. The import interface will not recognize files in any other format including Excel (.xls or .xlsx file). If you have a previously exported pricing grid in an Excel file format, you must re-save the Excel file into the CSV format first.
**Note:** Column A (Billed To) through I (Comments) in the .csv file must be kept in the same sequence. If you delete or add columns between A and I, the pricing grid will not import correctly. However, adding or removing Time Points (columns after column I) will not affect the import.

This will generate a pricing grid with the contents from your file:

![Pricing Grid Example](image)

**Note:** The Import Interface will validate all imported prices against the most current fee schedule used by the Tool. If you import a file with outdated prices or you have manipulated the prices prior to the import, the import interface will overwrite the prices to match the most current research prices listed in the Tool.

You can now interact with the pricing grid as if you had manually entered all of this data. You can add or delete rows or time point columns, change CPT codes, etc. When complete, you can export the updated pricing grid.

**Maintain a List of Frequently Used Services**

To take advantage of the Tool’s import function, researchers are encouraged to maintain a list of frequently used services with CPT codes and service locations for their studies. The list can be constructed in the same format of the Pricing Tool export/import file. When a new study comes in, researchers can quickly obtain updated Medicare rate estimates and list price estimates by importing the master list to the Pricing Tool.