OnCore System Work Instruction Document

Adding an Additional Visit and Services into OnCore

Prepared For: OnCore Version 2020R2
Revision Number: 2
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The URL for OnCore is https://OnCore.ynhh.org
For more information about OnCore please visit the project website at http://OnCore.yale.edu
Adding an Additional Visit and Services into OnCore

- This would be used when you have a subject that comes in for a mid-cycle follow up or if drug is held and they restart at a later date

- This must be done if the visit is not captured in the standard OnCore calendar, as anyone doing charge review will be using the OnCore calendars as the source of truth to verify DOS and whether they are study related

- All OnCore calendar visits must be updated by close of business every day

Adding an additional visit into OnCore

In order to make charge matching easier for reviewers we will now be using the *Additional Visits* tab within the subject console to add visits not captured on the standard OnCore calendar. Start in the subject console, on the left side below the *Calendar* tab, click *Additional Visits*. On the right-hand side click the *New* button.

You will be brought to the *Subject Visit Update* screen that looks and functions just like a normal subject visit update screen from a standard OnCore calendar visit. Enter the date that the visit occurred, the visit description, and click submit. In the example I am going to use, the subject came in for Rescreen Bloodwork on 2-5-19.

You will then scroll down to the bottom of the page and click submit.
Then click on the button for “Additional Procedures” a box will appear for all the services associated with this study. Click on the boxes of the services the subject had at their additional visit (ie labs, physical exam, EKG, etc). When you have selected all the services, click “Submit”
Another box with blank text boxes next to the services will appear

<table>
<thead>
<tr>
<th>Additional Procedure</th>
<th>Reason for adding</th>
</tr>
</thead>
<tbody>
<tr>
<td>BKR-CBC Complete with Platelets and Differential</td>
<td></td>
</tr>
<tr>
<td>BKR-Comprehensive Metabolic Panel</td>
<td></td>
</tr>
<tr>
<td>Beaker Labs</td>
<td></td>
</tr>
<tr>
<td>Beaker Labs</td>
<td></td>
</tr>
</tbody>
</table>

Use these text boxes to state why you have added the additional procedures. In here you can type Additional Visit: Rescreen. You can copy and paste all the way down in the text boxes. Once you get to the bottom of the list click **OK**.

You will see the additional services added to the visit.
All procedures will be automatically loaded as research sponsored. If they should be Standard of Care click the SOC box. Click Submit and close at the bottom.

Anyone viewing the subject calendar (including the charge reviewers) will be able to look for the additional visits under this tab. By clicking on the hyperlink for the visit ID they will be able to view the specific procedures for that visit.
Adding an Additional Service to a visit

- This is very similar to adding another visit, but instead of choosing all of the services, you just choose the one service you need.

- For example, if at this visit your subject had a Chest x-ray and Complete Physical Exam Mark that is not included in the protocol calendar for this timepoint, mark the visit as “Occurred” in OnCore:

Click “Submit”

Scroll down to the bottom and click on “Additional Procedures”
Click on the procedure you want to add in the Procedure Add Box, which in this case would be: Chest x-ray and Complete Physical Exam

Click submit and enter a reason for adding this procedure:

Click “Ok” and your additional procedure will appear at the bottom of the services already in there for the visit.
All procedures will be automatically loaded as research sponsored. If they should be Standard of Care click the SOC box. Click Submit and close at the bottom.

<table>
<thead>
<tr>
<th>Procedure</th>
<th>Procedure Date</th>
<th>SOC</th>
<th>SOC Modifier</th>
<th>Missed</th>
<th>Missed Count</th>
<th>N/A</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 Lead ECG</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

If the procedure you have added is occurring on the DOS of the “Occurred” visit in OnCore, there is no reason to add the additional date in OnCore. But remember, if any services are occurring on a different DOS than the cycle/visit, please be sure to update the date fields with that correct DOS.