

OnCore System Work Instruction Document

Adding an Additional Visit and Services into OnCore

Prepared For: OnCore Version 2020R2

Revision Number: 2

Revision Date: September 1, 2020

The URL for OnCore is <https://OnCore.ynhh.org>

For more information about OnCore please visit the project website at <http://OnCore.yale.edu>

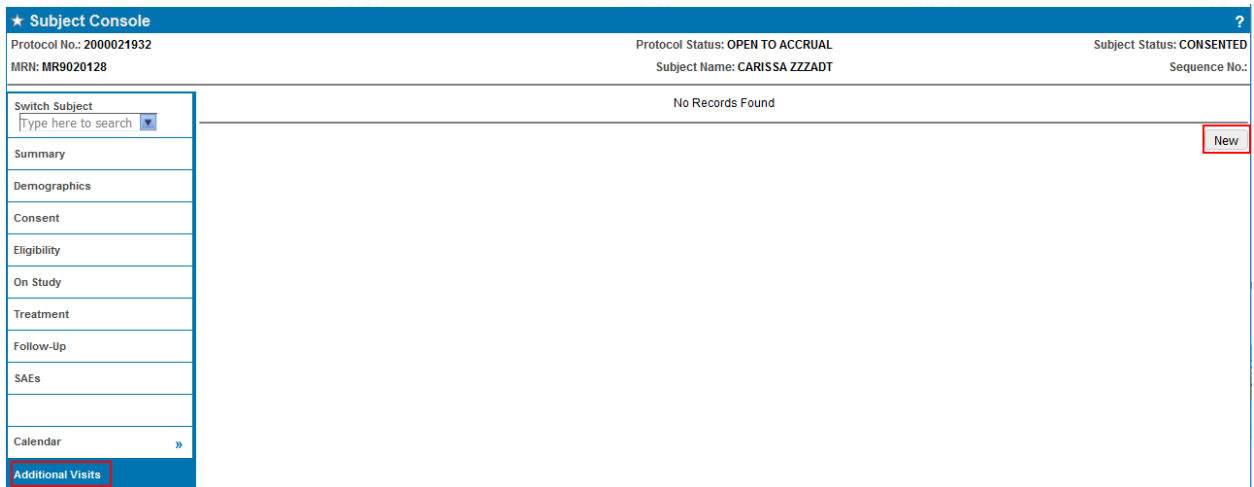


Adding an Additional Visit and Services into OnCore

- 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

OnCore Work Instruction Document – Adding Additional Visits and Services

Subject Visit Update User: Kelly Burton

Protocol No.: 2000021932 Protocol Status: OPEN TO ACCRUAL Subject Status: CONSENTED
MRN: MR9020128 Subject Name: CARISSA ZZZADT Sequence No.:

Visit Details

Visit Date: 02/05/2019
Visit Description: Rescreen
Data Collection Completed Date: Monitored Date: Submitted Date: Locked Date:
Collection Location: Collection Time (hh:mm):
Clinical Comments:
Data Comments:

Procedures

Procedure	Procedure Date	SOC	SOC Modifier	Missed	Missed Count	N/A
No Procedures Found						

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Then click on the button for “Additional Procedures”

Subject Visit Update User: Kelly Burton


Protocol No.: 2000021932 Protocol Status: OPEN TO ACCRUAL Subject Status: CONSENTED
MRN: MR9020128 Subject Name: CARISSA ZZZADT Sequence No.:

Visit Details

Visit Date: 02/05/2019
Visit Description: Rescreen
Data Collection Completed Date: Monitored Date: Submitted Date: Locked Date:
Collection Location: Collection Time (hh:mm):
Clinical Comments:
Data Comments:

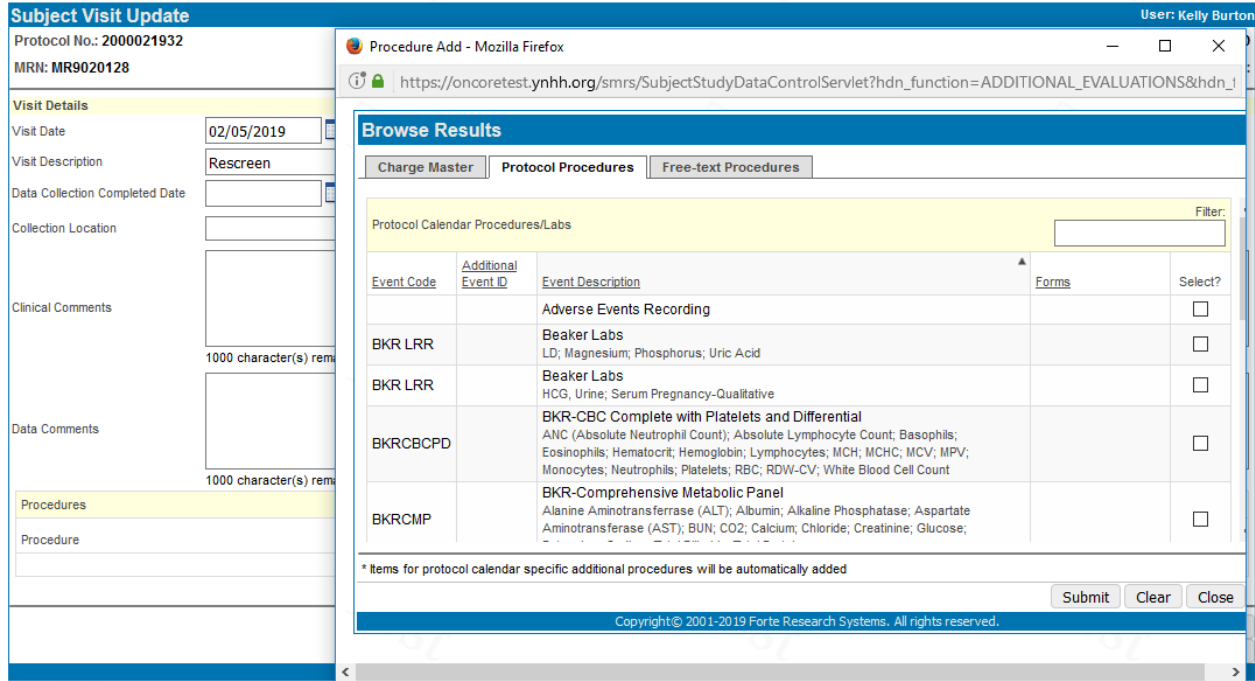
Procedures

Procedure	Procedure Date	SOC	SOC Modifier	Missed	Missed Count	N/A
No Procedures Found						



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When you click “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



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.

OnCore Work Instruction Document – Adding Additional Visits and Services

Procedures							
Expand All Collapse All							
Procedure	Procedure Date	SOC	SOC Modifier	Missed	Missed Count	N/A	
[-] BKR-Comprehensive Metabolic Panel [Alanine Aminotransferase (ALT); Albumin; Alkaline Phosphatase; Aspartate Aminotransferase (AST); BUN; CO2; Calcium; Chloride; Creatinine; Glucose; Potassium; Sodium; Total Bilirubin; Total Protein]	<input type="text"/>						Delete
Charge Master Events							
36415- ROUTINE VENIPUNCTURE OR FINGER/HEEL/EAR STICK FOR COLLECTION OF SPECIMEN(S)		<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	
Tech- ROUTINE VENIPUNCTURE OR FINGER/HEEL/EAR STICK FOR COLLECTION OF SPECIMEN(S)							
Charge Master Events							
80053- Comprehensive metabolic panel		<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	
[-] Beaker Labs ^P [HCG, Urine; Serum Pregnancy-Qualitative]	<input type="text"/>						Delete
Charge Master Events							
Labs		<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	
36415 - ROUTINE VENIPUNCTURE OR FINGER/HEEL/EAR STICK FOR COLLECTION OF SPECIMEN(S)							
81025- Urine pregnancy test							
84702- Serum Pregnancy, Human Chorionic Gonadotropin (hCG, Beta-hCG); Quantitative, Routine							
[-] Beaker Labs [LD; Magnesium; Phosphorus; Uric Acid]	<input type="text"/>						Delete
Charge Master Events							
Labs		<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	
36415 - ROUTINE VENIPUNCTURE OR FINGER/HEEL/EAR STICK FOR COLLECTION OF SPECIMEN(S)							
83615- Lactate LD LDH enzyme							
83735- Magnesium							
84100- Phosphorus							
84550- Blood uric acid							
Foot Notes							
b A serum or urine pregnancy test should be performed at least 1x per cycle prior to dosing as well as during screening and at the follow-up/EOS visit.							
<input type="button" value="Additional Procedures"/> <input type="button" value="Billing Slip"/> <input type="button" value="View PDF"/> <input type="button" value="Delete"/> <input type="button" value="Clear"/> <input type="button" value="Submit"/> <input type="button" value="Close"/>							
<input type="button" value="Submit And Close"/>							

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.

Procedures							
Expand All Collapse All							
Procedure	Procedure Date	SOC	SOC Modifier	Missed	Missed Count	N/A	
[-] BKR-Comprehensive Metabolic Panel [Alanine Aminotransferase (ALT); Albumin; Alkaline Phosphatase; Aspartate Aminotransferase (AST); BUN; CO2; Calcium; Chloride; Creatinine; Glucose; Potassium; Sodium; Total Bilirubin; Total Protein]	<input type="text"/>		<input type="radio"/> Q0 <input checked="" type="radio"/> Q1 <input type="radio"/> Q <input type="radio"/> U				Delete
Charge Master Events							
36415- ROUTINE VENIPUNCTURE OR FINGER/HEEL/EAR STICK FOR COLLECTION OF SPECIMEN(S)		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	
Tech- ROUTINE VENIPUNCTURE OR FINGER/HEEL/EAR STICK FOR COLLECTION OF SPECIMEN(S)							
Charge Master Events							
80053- Comprehensive metabolic panel		<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	

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.

Visit Id	Visit Date	Visit Description
658226	02/05/2019	Rescreen

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:

Visit Details Phase: Treatment Visit: 10

Visit Date Visit Status Planned Occurred Missed N/A Visit Tolerance +/-5

Visit Description Reset Calendar?

Data Collection Completed Date Monitored Date Submitted Date Locked Date

Collection Location Collection Time (hhmm)

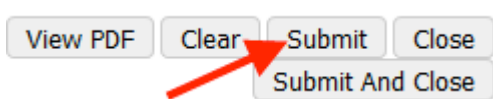
Clinical Comments

1000 character(s) remaining

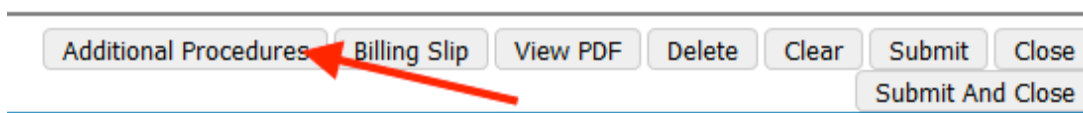
Data Comments

1000 character(s) remaining

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

Browse Results				
Charge Master	Protocol Procedures	Free-text Procedures		
		Central Lab Pregnancy Test		<input type="checkbox"/>
		Central lab urinalysis		<input type="checkbox"/>
		CGIC		<input type="checkbox"/>
		Chest x-ray		<input checked="" type="checkbox"/>
		Complete physical exam		<input checked="" type="checkbox"/>
		Concomitant medications		<input type="checkbox"/>
		Demographics		<input type="checkbox"/>
		Dispense eDiary		<input type="checkbox"/>
		eDiary		<input type="checkbox"/>
		eDiary Review		<input type="checkbox"/>
		ePayment \$100		<input type="checkbox"/>
		EQ 5D-5L		<input type="checkbox"/>

* Items and forms for protocol calendar specific additional procedures will be automatically added

Submit Clear Close

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Click submit and enter a reason for adding this procedure:

Additional Procedure	Reason for adding
Chest x-ray	<input type="text"/>
Complete physical exam	<input type="text"/>

OK Cancel

Click "Ok" and your additional procedure will appear at the bottom of the services already in there for the visit

Chest x-ray¹	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
71010- RADIOLOGIC EXAMINATION, CHEST; SINGLE VIEW, FRONTAL									
Prof- RADIOLOGIC EXAMINATION, CHEST; SINGLE VIEW, FRONTAL									
Tech- RADIOLOGIC EXAMINATION, CHEST; SINGLE VIEW, FRONTAL									
Complete physical exam²	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Delete
99204- COMPREHENSIVE/MODERATE OFFICE/OUTPATIENT VISIT, NEW - APPROX 45 MINS									

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.

Procedures								
Expand All Collapse All								
Procedure	Procedure Date	SOC	SOC Modifier	Missed	Missed Count	N/A		
12 Lead ECG.m	<input type="text"/>	<input type="checkbox"/>	<input type="radio"/> Q0 <input checked="" type="radio"/> Q1 <input type="radio"/> U	<input type="checkbox"/>				Delete
Charge Master Events								
93000- ELECTROCARDIOGRAM, ROUTINE ECG W/AT LEAST 12 LEADS; W/INTERPRETATIONANDREPO		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>		

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.