



Guideline: Checking In a Visit When Procedures Are Performed Over Multiple Days

Objectives:

- Inform Study Coordinators how to accurately check in a visit when procedures for that visit are performed on multiple days.

Reason:

- For the OnCore/Epic integration and billing compliance, accurate information on what was performed during a visit must be included in the OnCore study visits. Marking a visit as “Occurred” allows a visit to be invoiced. This option should not be available until all procedures are performed in order to minimize erroneous charges and the need to retroactively undo/correct invoices.

Study Coordinator Process:

1. When procedures for one visit (i.e. screening procedures) are performed over multiple days, leave the visit as “Planned” until the last procedure(s) are performed. KEEP the Original Visit date
2. As procedures are performed, enter the correct date for each procedure within the visit. (Each procedure has a “date performed” column within the visit.)
 - a. Subjects -> CRA Console -> select subject -> Calendar -> select visit hyperlink -> enter date performed

Visit Date: 02/08/2017

Visit Status: Planned Occurred Missed N/A

Collection Location: UC Health-Central Region

Procedures:

Procedure	As Needed	Procedure Date	SOC	SOC Modifier	Missed	Missed Count	N/A	Location
Physical Exam		02/05/2017	<input checked="" type="checkbox"/>	<input type="radio"/> Q0 <input checked="" type="radio"/> Q1 <input type="radio"/> U	<input type="checkbox"/>		<input type="checkbox"/>	
12-lead ECG		02/05/2017						
EKG Tracing Only, No I & R			<input type="checkbox"/>		<input type="checkbox"/>			Research Team
Imaging		02/07/2017	<input type="checkbox"/>		<input type="checkbox"/>			
CT Chest with and without contrast								UCHealth- Metro Denver
Pregnancy Test ^{AN}	Yes	02/04/2017						
Pregnancy Test-Serum or Urine			<input type="checkbox"/>		<input type="checkbox"/>			UCHealth- Metro Denver
Questionnaire			<input type="checkbox"/>		<input type="checkbox"/>			Research Team

- b. Click “Submit” to save data as you go along.



3. On the last date on which procedures are performed, mark the visit as “Occurred.” And submit
 - a. The visit date would stay as the original date of the visit.
 - b. The “date performed” column for procedures performed on this same date can be left blank. OnCore automatically assumes that the “date performed” is the same as the “date occurred” unless a different date is entered.

Visit Details Phase: Treatment Visit: C2D1 Version: V1 (11/13/2017)

Visit Date:

Visit Status: Planned Occurred Missed N/A

Visit Description:

Data Collection Completed Date: Monitored Date: Submitted Date: Locked Date:

Collection Location: Collection Time (hh:mm):

Clinical Comments:

Data Comments:

Procedures

[Expand All](#) [Collapse All](#)

Procedure	As Needed	Procedure Date	SOC	SOC Modifier	Missed	Missed Count	N/A	Location
Physical Exam		<input type="text" value="02/05/2017"/> <input type="button" value="calendar"/>	<input checked="" type="checkbox"/>	<input type="radio"/> Q0 <input checked="" type="radio"/> Q1 <input type="radio"/> U	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	
<input type="button" value="external"/> 12-lead ECG		<input type="text" value="02/05/2017"/> <input type="button" value="calendar"/>						
Charge Master Events								
EKG Tracing Only, No I & R			<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="Research Team"/>
Imaging		<input type="text" value="02/07/2017"/> <input type="button" value="calendar"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	
<input type="text" value="CT Chest with and without contrast"/> <input type="button" value="dropdown"/> CT Chest with and without contrast - Tech Fee CT THORAX W/O CONTRAST FOLLOWED BY CONTRAST - Pro Fee								
<input type="button" value="external"/> Pregnancy Test ^{AN}	Yes	<input type="text" value="02/04/2017"/> <input type="button" value="calendar"/>						
Charge Master Events								
Pregnancy Test-Serum or Urine			<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="UCHealth- Metro Denver"/>
Drug administration		<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	
<input type="button" value="external"/> Drug Dispensing		<input type="text"/>						
Charge Master Events								
Drug Dispensing - Non-Oncology			<input type="checkbox"/>		<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="UCHealth- Metro Denver"/>
<input type="button" value="external"/> Questionnaire		<input type="text"/>						