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
   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.