CRSO MONTHLY UPDATES – MONTH/YEAR

Please see the following updates for this month regarding OnCore, Participant Payments, eReg, and/or Epic Research.

ONCORE AND EPIC - FINANCE NEWS

- The CRSO team has created new tip sheets for the Financial Console section. We encourage you to use the system to create invoices. This will help our GCA team, who currently accesses the system to match payments to outstanding invoices. These documents can be found on the CRSO website: https://ctsi.utah.edu/crso/oncore/tip-sheets-sops

- Reminder from RCSS and UMB Offices. If you're missing a code or need one added to an EPIC HAR Account, please contact the following groups:

  o Professional – UMB.Coding.Team@hsc.utah.edu
  o Technical – askOPCoding@hsc.utah.edu

- The Epic research adjustments to Peoplesoft reports in the S/Drive and Box have been renamed. Here is the description of each report:

- **PostingErrorsByProtocol.xlsx**: Contains all Protocols that have pending adjustments that could not be posted to PeopleSoft, due to an error when they tried to post.

- **PostingErrorsByAdjustment.xlsx**: This contains the same protocol's as PostingErrorsByProtocol.xlsx and includes additional information about what adjustments are pending. This data and the data from PostingErrorsByProtocol.xlsx were previously in one Excel Workbook called PostingErrors.xlsx, but I have broken them out so that I can automate the creation of these reports.

- **ProtocolChartfieldValidationErrors.xlsx**: These are Protocols in OnCore that don't currently have adjustments pending, but it was determined that the chartfield(s) on the Protocols contain invalid information. If left uncorrected these issues will potentially cause errors for pending adjustments.

- **DetailsByAdjustment.xlsx**: This contains the details of all Epic Adjustments posted to PeopleSoft. This is the most accurate place to find Epic details about what was posted to PeopleSoft. This was previously called Posting_Details.xlsx, but I renamed it for consistency and clarity.

- **DetailsByChargePB.xlsx**: This contains the details of all PB Epic Charges associated with the Epic Adjustments that were posted to PeopleSoft. This is mostly accurate thanks to partial linkage of PB charges to matching adjustments. I am continually improving the accuracy of this report by tweaking the logic as users report issue. This was previously called PB_Research_Charges_With_PS_Info.xlsx, but I renamed it for consistency.

- **TestDetailsByChargeHB.xlsx**: This contains the details of all HB Epic Charges associated with the Epic Adjustments that were posted to PeopleSoft. This is a new report that I still consider to be in a testing phase. Epic has no direct link in their database between Adjustments and Charges, they also don't store the calculated research amount, so reporting on this information is extremely difficult. I am continually improving the accuracy of this report by tweaking the logic as users

This document was created by the
Clinical Research Support Office
CRSO@hsc.utah.edu
Version Date: 07/10/2024
Page 1 of 3

report issue. This was previously called Test_HB_Research_Charges_With_PS_Info.xlsx, but I renamed it for consistency.

- **EpicHBResearchChargesFY 20YY-20YY.xlsx**: These reports are an extract of the Hospital Account Notes that are created in Epic when research contractual adjustments are posted in Epic. This was created to help the administration determine how much of a discount is being given on research charges for each fiscal year.

ONCORE

- **Sponsors in OnCore:** It will be helpful for study teams to add sponsors in OnCore. We are finding several where they are missing or do not match what was listed in ERICA.
  - Sponsors are used for cancer center, leadership, department reporting, billing for CTMS fees, etc. The GCA office also uses OnCore to identify sponsors for wire transfers that are received. This helps streamline the process of applying receipts to protocols.
  - Principal Sponsors:
    - HCI studies rely on the primary sponsor for their reporting requirements. If you are unsure of how to identify a principal sponsor, please contact Laura Hayes (laura.hayes@hci.utah.edu).
    - Otherwise, please use the "principal sponsor" role for those entities that are funding the study.
      - If you do not see the sponsor listed in ERICA, please submit a Service Now ticket to request that it be added. The CRSO and HCI teams work closely to ensure that these are entered into OnCore correctly. We also work closely with OSP to ensure that we are using PeopleSoft as the source of truth for data in OnCore.
      - OnCore will default to the principal sponsor for the billing of services. If there are differences that need to be identified, please update the sponsor in the financial console.

PARTICIPANT PAYMENTS

- Hyperwallet is having issues transferring balances. Make sure you email CRSO Payments to get any balances transfer completed @CRSOparticipantpayments@hsc.utah.edu
- New Payments classes are coming this fall!

eREG

- New roles are being created for our eReg users. This was done to provide more flexibility for our institution.
- The system will be updated on 07/16/24 6:00 – 10:00 PM. More information will be sent out next week.

This document was created by the
Clinical Research Support Office
CRSO@hsc.utah.edu
Version Date: 07/10/2024
Page 2 of 3

System Support

If you are having issues with the system or need additional support, please submit a [Service Now Ticket](). This is the best way for your concern to be addressed more efficiently.

CRSO Huddle.

Don't forget about the bi-weekly CRSO Huddle (every other Tuesday at 10:00-10:45), please let us know! We review updates and learn from you about how the system is working. You can email CRSO@hsc.utah.edu.

Website Resources

Please visit our website about each system, training opportunities, and tip sheets.

- CRSO Website: https://ctsi.utah.edu/crso
- OnCore: https://ctsi.utah.edu/crso/oncore
- Participant Payments: https://ctsi.utah.edu/crso/oncore/participant-payments/about
- eReg: https://ctsi.utah.edu/crso/oncore/ereg
- Epic Research: https://ctsi.utah.edu/crso/oncore/epic-research

Email

- OnCore or CRSO Questions: CRSO@hsc.utah.edu
- Participant Payments Questions: CRSOParticipantPayments@hsc.utah.edu
- Finance Questions: CRSOFinance@hsc.utah.edu
- eReg or Study Monitor Questions: gretchen.seipp-inman@hsc.utah.edu

This document was created by the
Clinical Research Support Office
CRSO@hsc.utah.edu
Version Date: 07/10/2024
Page 3 of 3