



University
of Vermont

Larner College of Medicine

OnCore System Guideline
Post-Award Financials Review

Prepared for: OnCore Version 2023R3.4

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Objective:

This guidance sheet was prepared to provide support for clinical teams tasked with post-award financials work. This document covers workflows and details needed within the financials console related specifically to invoicing and receiving/tracking payments.

Financials Console

1) Post-Award Financials

- a) Protocol Events – document the protocol related events that have occurred to create corresponding items on the Invoiceable Items page
- b) Invoiceable Items
 - i) All available invoiceable items will be shown here
 - ii) Separated by protocol related, subject related, and pass thru items
 - iii) Entering in an “Invoice Date” will create the invoice, so make sure that is the last step you do when creating and editing your invoice
- c) Invoicing Rules
 - i) Once a staff member enters a rule OnCore will automatically create invoices dependent of the rule
 - ii) If there are multiple sponsors, please ensure you are selecting the correct sponsor for each rule
 - iii) Available rules
 - (1) Invoice Frequency – select a frequency (in months) for OnCore to create an invoice
 - (a) Subject related and pass thru items will be automatically added, but protocol related will need to be added by staff
 - (2) Invoice After – enter the subject count and a subject milestone to tell OnCore when to create an invoice
 - (a) The milestones shown in the drop down were selected in the milestones tab
 - (b) If the “Run Once?” is selected, OnCore will only create an invoice the first time the rule is met
 - (3) Do Not Bill – prevents new invoiceable items from being added after the option is set
- d) Invoices – collection of all invoices viewed here
 - i) If checks are received and payments are applied to an invoice, can be viewed here
- e) Receipts

- i) All checks received will be entered here
- ii) Apply payments to invoices using the “Details” link once the check is created
 - (1) Use “Select” to open a pop-up to view and select available invoices
 - (2) In the “Payments” section, enter amount you would like to apply to each invoice
- f) Visit Variations
 - i) Select and specify which variations should be invoiced
 - ii) Verify visit variations