Description: Checking in a study visit involves submitting visit information, which consequently updates the status of the visit. A visit will have one of four statuses: Planned, Occurred, Missed, or N/A. This tip sheet describes how to:

- Check in Planned visits as Occurred, Missed, or N/A
- Add unplanned/unexpected procedures to a visit
- Add unplanned/unexpected visits
- Change a procedure Billing Designation from the planned designation

Audience: Study team members who are responsible for recording study visits in OnCore.

CHECK IN AN OCCURRED VISIT

1. Find your subject.

2. On the subject record in the Subject Console, click the Calendar vertical tab.

3. In the header section of the calendar, click on the blue hyperlink for the visit you are checking in.

   Reminder: Visit hyperlinks within a given calendar segment will only become active and available for check-in once the “trigger date” or Start Date associated with that segment has been entered into OnCore for this subject.

4. The Subject Visit Update page opens.
5. The first field on this page is the **Visit Date**. The date in this field defaults to the **Planned Date** shown on the calendar. Change this date as necessary.

! Important: If there are tolerances set for this visit and your new date falls out of the tolerance, you will get a warning message. You can still check in this visit. The visit will be recorded in the subject’s **Subject Console > Deviations tab**.

6. Next to the **Visit Date** field is the **Visit Status** box. Notice that by default, the **Planned** radio button is selected.

7. Click the **Occurred** radio button.

8. Review the **Procedures** table at the bottom of the screen. The table lists the labs, panels, and procedures that have been scheduled within the visit. Unless they are marked as **Missed** or **N/A**, it is assumed that the visit has occurred as planned and that the procedures have been performed on the **Visit Date**, unless otherwise indicated by editing the **Procedure Date**.

9. If needed, enter **Visit Procedure Variations**. If a **Procedure** was:
   a. Performed on a **different date** than the **Visit Date**, enter the date in the **Procedure Date** field. Note: Blank means the procedure was performed on the default **Visit Date** – There is no need to type that date here again.
   b. Missed, click the **Missed** checkbox. Enter the reason in the pop-up box.
   c. Supposed to happen multiple times in the visit, but one or more of the repeats were missed, click the **Missed** checkbox and indicate how many were missed in the **Missed Count** field. Enter the reason in the pop-up box.
   d. Not applicable for this subject, click the **N/A** checkbox. Enter the reason in the pop-up box.

10. Click **[Submit And Close]** to return to the Subject Calendar.

11. On the Subject Calendar, your visit now shows up as **Occurred** and the **Visit Date** is now displayed.
Sometimes you will also need to document unplanned **Additional Procedures** that happened within an occurred visit.

1. First, follow all the steps for [Check in an Occurred Visit](#), including clicking [Submit] or [Submit And Close].
2. If needed, re-open the occurred visit to which you want to add the unplanned procedures.
3. Notice that after an occurred visit has been submitted, it will have some extra buttons at the bottom of the screen. Click the [Additional Procedures] button.

   ![Additional Procedures button](image)

4. A pop-up window opens with three horizontal tabs:
   a. **Charge Master** - Not applicable at UF yet.
   b. **Protocol Procedures** - This tab lists the labs, panels, and procedures that have already been set up for this protocol. If any of the unexpected procedures are on this list, click the Select? checkbox for each of them, and click [Submit]. Enter the reason(s) for adding in the pop-up box.

   ![Protocol Procedures tab](image)

   ![Free text Procedures tab](image)

   c. **Free-text Procedures** - If any unexpected procedure is not already in the protocol list, you can add it by typing the new procedure name into the Clinical Procedure box, clicking the small blue Add hyperlink. Repeat for each procedure as needed, then Click [Submit]. Enter the reason(s) for adding in the pop-up box.

   ![Free text Procedures tab](image)

5. Once you have added all unexpected procedures, click [Submit And Close] to return to the Subject Calendar.
CHECK IN SUBJECT VISITS

CHECK IN A MISSED VISIT

1. **Find your subject.**
2. On the subject record in the Subject Console, click the Calendar vertical tab.
3. In the header section of the calendar, click on the blue hyperlink that describes the missed visit.
4. Click the Missed radio button.
5. Click [Submit And Close] to return to the Subject Calendar.
6. On the Subject Calendar, the Visit Status now shows up as Missed and the original planned Visit Date displays in red.

![Calendar Screenshot](image)

CHECK IN A RESCHEDULED MISSED VISIT

If you have recorded a planned visit as Missed, but the subject subsequently was able to reschedule or “make it up”, you can delete the Missed visit and re-check it in as Occurred.

1. **Find your subject.**
2. On the subject record in the Subject Console, click the Calendar vertical tab.
3. In the header section of the calendar, click on the blue hyperlink for the Missed visit you are now checking in.
4. Click the [Delete] button at the bottom of the screen and then click [OK]. Note that this has undone (or removed) the visit information, allowing you to go back and mark the visit as Occurred.
5. Click on the blue hyperlink of the visit again.
6. Change the Visit Date to the rescheduled date.
7. In the Visit Status box at the top middle of the screen, click the Occurred radio button.
8. If this rescheduled visit requires that subsequent visits be “shifted” to conform to the protocol, click the drop-down menu next to Reset Calendar and select All Visits or Current Segment, as applicable.
9. Click [Submit And Close] to return to the Subject Calendar.
10. On the Subject Calendar, your visit now shows up as Occurred and the new Visit Date is displayed.
11. If you reset the calendar, subsequent planned dates have been adjusted.

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*If there are tolerances set for this visit and your new date falls out of the tolerance, you will get a warning message. You can still check in this visit. The visit will be recorded in the subject’s Subject Console > Deviations tab.*
CHECK IN A N/A VISIT

A N/A visit status indicates that the visit does not apply to this subject. Marking a visit N/A will create a visit variation in the Financials Console.

1. **Find your subject.**
2. On the subject record in the Subject Console, click the Calendar vertical tab.
3. In the header section of the calendar, click on the blue hyperlink that describes the N/A visit.
4. In the Visit Status box at the top middle of the screen, click the N/A radio button.
5. Click [Submit And Close] to return to the Subject Calendar.
6. On the Subject Calendar, the Visit Status now shows up as N/A and the original planned Visit Date displays in red.

ENTER ADDITIONAL AND/OR UNEXPECTED SUBJECT VISITS

At times, subjects will be seen for additional or unexpected visits that are not on the calendar. These visits should be recorded on the subject’s Additional Visits vertical tab.

1. **Find your subject.**
2. On the subject record in the Subject Console, click the Additional Visits vertical tab.
3. Click the [New] button on the far right. The Subject Visit Update screen appears.
4. Complete the following fields:
   - Visit Date
   - Visit Description
5. Click [Submit]; the [Additional Procedures] button will appear at the bottom of the screen.
6. Click [Additional Procedures].
7. Add all of the procedures in this unplanned visit using the Additional Procedures functionality.

**NOTE:** Additional Visits do NOT appear on the subject calendar.
CHECK IN SUBJECT VISITS

CHANGE A BILLING DESIGNATION FROM THE PLANNED DESIGNATION

Billing Designations indicate how the costs will be covered for the procedures within each visit. These are determined prior to study start-up by the study Financial Coordinator using UF and Medicare Coverage Analysis rules and the final budget. The planned designations for each procedure are entered into OnCore by the OCR office.

If the planned Billing Designation for a specific visit/procedure needs to be added/updated/corrected for all subjects going forward, the study team must submit an amended billing grid/budget to the OCR office so that the OnCore billing plan, budget, and calendar are updated appropriately.

In rare circumstances, the Billing Designation for a specific procedure for a specific subject needs to be updated (e.g. a procedure designated as a Routine Cost “SOC” procedure will be paid for by the study for this subject).

**WARNING!** Changing a default planned Billing Designation will result in a visit variation in the Financials Console.

It may also have an impact on the budget, calendar, and sponsor invoicing functionalities in OnCore, and subsequently increase the patient care billing compliance risk for this study.

It is highly recommended that you check with your Group Supervisor, Financial Coordinator and/or Epic Charge Reviewer before changing a Billing Designation in OnCore.

Change from Study Paid to SOC

1. In the Procedures list, locate the procedure that needs a change in designation.

2. In the SOC column, check the SOC checkbox.

3. Enter the Reason for Change in the resulting pop-up box and click [OK].

4. Update the radio button in the SOC Modifier column to indicate the correct billing modifier:
   - Use Q0 to designate the item under investigation in the qualifying trial/study
   - Use Q1 to identify a qualifying “Routine Cost” provided in a qualifying trial/study
   - Use U if modifier is unknown

5. Click [Submit]. The changed procedure now shows as a blue hyperlink; when clicked, OnCore displays the pop-up box that indicates the Reason for Change.
CHECK IN SUBJECT VISITS

Change from SOC to Study Paid

1. In the Procedures list, locate the procedure that needs a change in designation.

<table>
<thead>
<tr>
<th>Procedures</th>
<th>Procedure Date</th>
<th>SOC</th>
<th>SOC Modifier</th>
<th>Missed</th>
<th>Missed Count</th>
<th>N/A</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fever Prevention Index Procedure</td>
<td>03/18/2018</td>
<td>☑️</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hourly Core Body Temperature</td>
<td>03/18/2018</td>
<td>☑️</td>
<td>☐️</td>
<td>☑️</td>
<td>☑️</td>
<td>U</td>
<td></td>
</tr>
<tr>
<td>Daily White Blood Cell Count</td>
<td>03/18/2018</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. In the SOC column, uncheck the SOC checkbox.

3. Enter the Reason for Change in the resulting pop-up box and click [OK].

4. The SOC and SOC Modifier columns are now blank.

5. Click [Submit]. The changed procedure now shows as a blue hyperlink; when clicked, OnCore displays the pop-up box that indicates the Reason for Change.