**DOCUMENT A FINANCIAL EVENT**

**Description:** Based on the sponsor’s payment terms and as applicable, the OCR Coverage Analysis and Budget team will configure protocol-related budget events that require the study team to alert financial staff when one of the protocol-related events has taken place and is ready for inclusion on an invoice to the sponsor. These **Financial Events** are documented in the CRA Console.

**Audience:** Study team members who are responsible for documenting study-related events

1. Navigate to **Menu > Subjects > CRA Console**.
2. Find your study using the **Select Protocol** search field.
3. Click on vertical **Financial Events** menu.

![Select Protocol menu](image)

4. Click the **[Update]** button.
5. Select the event from the drop-down list in the **Add Financial Events** box.

![Add Financial Events](image)

6. Enter the date the event occurred and any required comments. Comments entered here are visible for the financial teams in the **Financials Console**.

7. Click the **[Add]** button.

The **Financial Event** has now been recorded and will generate an invoiceable item in the **Financials Console**.

---

**Need Help? Contact UF OnCore Support Team** [OnCore-Support@ohc.ufl.edu](mailto:OnCore-Support@ohc.ufl.edu) 352-273-5924