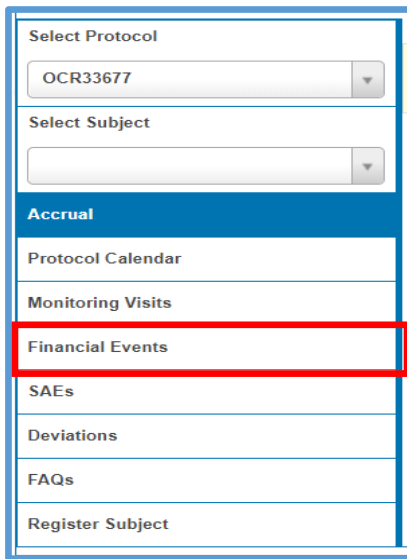


Description: Based on the sponsor’s payment terms and as applicable, the OCR Coverage Analysis and Budget team will configure protocol-related budget events that require the study team to alert financial staff when one of the protocol-related events has taken place and is ready for inclusion on an invoice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

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

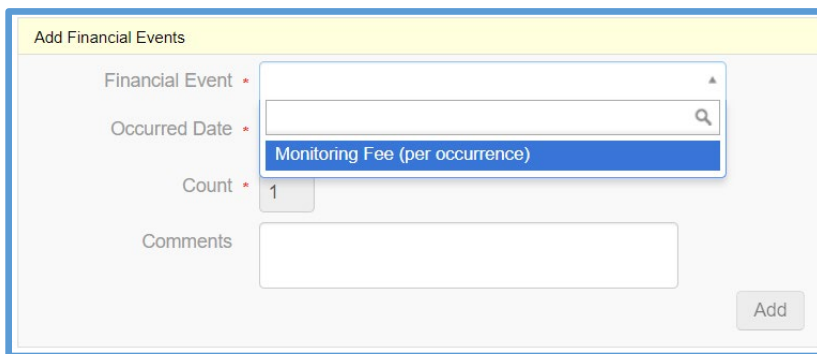
DOCUMENT A FINANCIAL EVENT

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



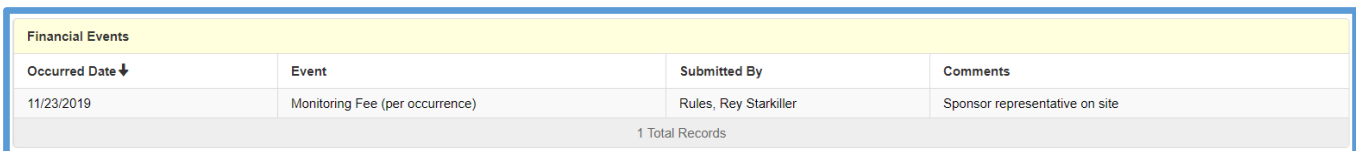
The screenshot shows a vertical menu with the following items: Select Protocol (with a dropdown showing OCR33677), Select Subject (with a dropdown), Accrual, Protocol Calendar, Monitoring Visits, Financial Events (highlighted with a red box), SAEs, Deviations, FAQs, and Register Subject.

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



The screenshot shows the 'Add Financial Events' form. It includes a 'Financial Event' dropdown menu with 'Monitoring Fee (per occurrence)' selected, an 'Occurred Date' field, a 'Count' field with the value '1', and a 'Comments' text area. An 'Add' button is located at the bottom right.

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.



Occurred Date ↓	Event	Submitted By	Comments
11/23/2019	Monitoring Fee (per occurrence)	Rules, Rey Starkiller	Sponsor representative on site

1 Total Records

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