LOCATE OCR REVIEW DOCUMENTS

UF OnCore Tip Sheet
Version 05/16/23

Description: As of June 1, 2019, the Office of Clinical Research (OCR) Coverage Analysis and Budget (CAB) team attaches OCR reviewed/approved research billing compliance documents directly to the OnCore record for that study. These documents include, as applicable:

- OCR Billing Grid
- OCR COS
- OCR Coverage Analysis
- OCR Device Table
- OCR Drug Table
- OCR FLA
- OCR Pricing Final Professional
- OCR Pricing Final Technical
- OCR Pricing Request

There are three ways to find OCR documents that have been associated with a protocol. Each method has pros and cons:

- Document Search
- Documents/Info > Attachments/Links Tab
- Institution Documents

DOCUMENT SEARCH

Document Search allows you to find documents that are associated with active protocols (i.e. protocols with a status of Open to Accrual, Closed to Accrual, or Suspended). It displays documents that were attached in the following locations:

- PC Console > Documents/Info > Attachments/Links (this is where OCR attaches billing compliance documents)
- IRB Reviews
- PRMC Reviews created via ePRMS

Note: Documents attached to a PRMC or IRB Review must be Released in order to be found by Document Search.

When searching for the latest version of a document attached to a review, Document Search returns the latest document based on the version date, not the document associated with the latest review in OnCore.


2. In the Protocol No. field, type in one of the study identifiers used at UF (see Find Your Study for details).

3. If you want to see ALL versions of the documents, select the “Display All Documents” checkbox. If you only want to see the most current version of the documents, leave this box unchecked.

4. Click [Submit].
Example of results with “Display All Documents” selected – Note that multiple versions of the Informed Consent and Billing Grid are showing:

<table>
<thead>
<tr>
<th>Protocol No</th>
<th>All Protocol No</th>
<th>Short Title</th>
<th>Protocol Status</th>
<th>Document</th>
<th>File Name</th>
<th>Version Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCR19833</td>
<td>AMGEN-001; EZ-AHC-005; EZ-AHC-005</td>
<td>EZ-AHC-005</td>
<td>OPEN TO ACCRUAL</td>
<td>Informed Consent</td>
<td>IRB_Informed_Consent_Revised_Approved.doc</td>
<td>06/11/2016</td>
<td>Revision to include genetic tests</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Informed Consent</td>
<td>IRB_Informed_Consent_Approved.doc</td>
<td>04/30/2018</td>
<td>Main Consent</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>OCR Billing Grid</td>
<td>Billing_Grid_OCR12345_YYYY-MM-DD.xlsx</td>
<td>06/10/2018</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>OCR COS</td>
<td>COS_OCR12345_Radiology.doc</td>
<td>06/16/2016</td>
<td>COS Radiology</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>OCR COS</td>
<td>COS_OCR12345_IDS.doc</td>
<td>06/10/2018</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>OCR Coverage Analysis</td>
<td>MCA_OCR12345_YYYY-MM-DD.pdf</td>
<td>06/10/2018</td>
<td>MCAW completed by PI</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>OCR Device Table</td>
<td>Device_Table_OCR12345.doc</td>
<td>06/10/2018</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>OCR Drug Table</td>
<td>Drug_Table_OCR12345.doc</td>
<td>06/10/2018</td>
<td></td>
</tr>
</tbody>
</table>

Example of Document Search Result with “Display All Documents” NOT selected – Note that only the most recent versions of the Informed Consent and Billing Grid are showing:

<table>
<thead>
<tr>
<th>Protocol No</th>
<th>All Protocol No</th>
<th>Short Title</th>
<th>Protocol Status</th>
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<th>File Name</th>
<th>Version Date</th>
<th>Description</th>
</tr>
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<tbody>
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<td>EZ-AHC-005</td>
<td>OPEN TO ACCRUAL</td>
<td>Informed Consent</td>
<td>IRB_Informed_Consent_Revised_Approved.doc</td>
<td>05/01/2016</td>
<td>Revision to include genetic tests</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
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<td>COS_OCR12345_Radiology.doc</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>OCR COS</td>
<td>COS_OCR12345_IDS.doc</td>
<td>06/10/2018</td>
<td></td>
</tr>
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<td></td>
<td></td>
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<td></td>
<td></td>
<td>OCR Drug Table</td>
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<td>06/10/2018</td>
<td></td>
</tr>
</tbody>
</table>

**Document Search pros:**

- Displays documents that were attached in multiple places, including consents that the study team has attached to IRB reviews.
- Allows the user to choose to display either all versions OR just current versions of the documents.

**Document Search cons:**

- Will only display documents for active protocols – This means that you can’t see the documents OCR has attached until the study has been opened to accrual.

Also see the [Document Search](#) user guide.
ATTACHMENTS/LINKS TAB

The Attachment/Links tab displays:

- Documents uploaded to **PC Console > Documents/Info > Attachments/Links**
- All released (non-consent) documents that were uploaded to an IRB review
- Any protocol documents uploaded to the **Protocol Institution > Documents** tab for the UF institution. Documents uploaded to other institutions do NOT appear on this tab.

1. Navigate to **Menu > PC Console**.
2. In the **Select Protocol** field, type in one of the study identifiers used at UF (see **Find Your Study** for details).
3. Click on the **Documents/Info vertical tab** and then select the **Attachments/Links** horizontal tab.

4. Click on the **Document Type** column header to sort the documents by type. All OCR document types begin with “OCR”.

5. Find the version you are interested in by reviewing the **Version Date** then click on the blue hyperlink for the document to display it.

**Attachment/Links display pros:**

- Displays the documents regardless of protocol status.

**Attachment/Links display cons:**

- Does not allow the user to just display current versions of the documents.
- Display excludes consents that are attached to IRB reviews.

*Note:* Some study teams upload additional copies of approved consents here, but we STRONGLY discourage this practice, as it can cause confusion regarding consent versioning.

Any documents reviewed/approved by IRB should be uploaded and released in the appropriate IRB review record.

Once the protocol is **Open to Accrual** in OnCore, we recommend that study teams use **Document Search** to find OCR and IRB documents.
INSTITUTION DOCUMENTS PAGE

The PC Console > Institution > [Institution] > Documents page allows institution-specific documents to be recorded and uploaded. Documents defined here are available to affiliate users both from this page and through Document Search.

The Institution Documents page also displays any institution-specific documents that have been uploaded in Admin > Organizations > [organization] > Attachments.

1. Navigate to Menu > PC Console.
2. In the Select Protocol field, type in one of the study identifiers used at UF (see Find Your Study for details).
3. Click on the Institution vertical tab.
4. Select the blue hyperlink for the institution for which you want to review documents.

5. On the Protocol Institution page, select the Documents vertical tab.

6. Click on the Document Type column header to sort the documents by type. All OCR document types begin with “OCR”.

7. Find the version you are interested in by reviewing the Version Date then click on the blue hyperlink for the document to display it.

Institution Documents pros:
- Allows you to see institution-specific documents.

Institution Documents display cons:
- Same cons as Attachment/Links display.
- Involves extra navigation clicks to a screen most UF OnCore users do not use.