

IOWA

Institute for Clinical and Translational Science

ICTMS Community Informational Meeting

Jan 23, 2024

Agenda

- ICTMS Enterprise Expansion Project Update
- Tips & Tricks reviewing a BOS build calendar and budget
- Invoicing reminders
- eReg expansion status update
- Announcements

ICTMS Enterprise Expansion

Phase 1 Complete 2023

Phase 2 Early Spring 2024

Phase 3 Late Spring 2024

Phase 4 TBD



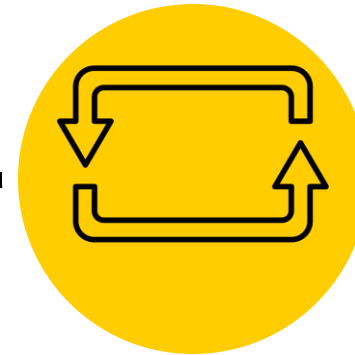
OnCore Expansion

- Available for use by all research studies
- Centralizes participant & visit tracking
- Sponsor invoicing
- Sponsor Payment tracking
- Interfaces EPIC, HawkIRB, V estigo, ePost



eReg Expansion

- Electronic Regulatory Binder
- Remote monitoring capability
- Electronic signatures
- Real-time document routing
- Enhance Compliance
- 21 CFR Part 11 Compliant



EDC Expansion

- Internal Electronic Data Capture
- Resource for lowa Investigator Initiated Trials
- Multi-site Studies
- 21 CFR Part 11 Compliant



Epic Research Billing & CRPC Grid

- Automated identification and separation of sponsor, patient and insurance billable research procedures

Tips & Tricks

Reviewing a BOS build calendar and budget

Step 1...

Gather Correct Documents

- Protocol
- Final Budget
- BOS Build Notes (Word & Excel Doc)
 - Word Document
 - Procedures- Tells you why procedures were added & if they were added per SOE or the CTA/budget
 - Footnotes- if footnotes have been added per SOE or CTA/budget
 - Financials Console Section- explains the approach the BOS team took for the protocol and subject related items
 - Excel Document
 - Helpful if you don't have access to the financials console in OnCore

Calendar Review

- ❑ PC Console -> Protocol Calendar
- ❑ Legend
 - SOC = Billable to Patient/Insurance
 - RS = Paid for by Sponsor \$\$
 - NB = Not Billable to Patient/Insurance (not paid for by Sponsor)
- ❑ Duplicate Line Items
 - BOS builds from the protocol & the budget
 - Items added from the budget are typically towards the bottom
 - Duplicate items CAN be deleted from the calendar

Pulse and BP ^{D; e}		3NB			3NB
Physical examination ^E		NB			NB
Height ^E		NB			
Physical examination with Pulse, BP and Height (as clinically indicated)		RS			RS



Budget Review

☐ Items to Delete From Calendar

- Financials Console -> Subject Related

[+] [Pulse and BP](#) ^{D,e}
 [+] [Physical examination](#) ^E
 [+] [Height](#) ^E

Charge			Charge Type
Retail	Research	Negotiated	
			N
			N
			N

☐ Reviewing Linked Charge Master Events

- Financials Console -> Subject Related -> "Expand All"

[+] [Urinalysis](#) ^{16,21,22,C10}
 [--- Event: 81025 Add'l ID: 30000098 - URINE PREGNANCY TEST [HB URINE PREGNANCY TEST]

- Deleting a charge master event also deletes the cost
- If an event has a visit override and you delete that event, you will also delete the override. You will then have to manually add the override ba

Charge Type
<div style="text-align: right;"> Actions ▾ </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <ul style="list-style-type: none"> Visit Overrides Clear Visit Overrides Delete </div>



Budget Review

- ❑* Items = budget only procedures and are not visible when Study Coordinators check in subjects
 - Examples- patient stipend, PI fee, SC fee, CRU fee, and IDS Dispensing fee
 - Items with a charge type of "P" are pass through items and show up on a separate invoice to send to the Sponsor
 - If a budget only procedure has a charge type of "P" this will not show up when a Study Coordinator checks in a subject's study visit. Therefore, if it did not happen then they cannot mark it as missed or N/A

[+] * IDS Dispensing - Ready to use products (oral, topical, or injectable) labeled for after visit use F5	15.00	40.00	115.00	Charge Type M/P
--	-------	-------	--------	--------------------

❑Thinking ahead..

- How is this going to look in OnCore?
- How will this calendar, budget, and linked events look when a subject is checked in?

Invoicing Reminders

Active studies utilizing Financial capability in ICTMS OnCore

Budgets ready for invoicing & sponsor payment tracking

General Research	48
HCCC	28

In 2024, our goal is to increase the number of studies that use ICTMS to track finances.

RETRO Invoice Process

RETRO Invoice Process NOT ready yet

- Grant Accounting automation not quite set up yet
- Use **MANUAL** Process in place of RETRO invoices, for now.

Just a *TEMPORARY* change

- Once Grant Accounting automation set up, will use RETRO process
- Until then use MANUAL PROCESS

Invoicing Procedure page

on ICON https://uiowa.instructure.com/courses/207040/pages/invoicing-procedure?module_item_id=6535303

Standard Process

- Process more rigid due to integration.
- *Invoice No* **MUST** use numbered Prefix:
 - 01, 02, etc
- Once finalized, Invoice pushed to Grant Accounting system. Must have following or else it will error out:
 - *Sponsor Protocol No* (**PC Console > Main > Sponsor**)
 - *Grant Accounting No.* Required in both:
 - **PC Console > Main > Management** tab *Hospital Account No* field
 - Suffix of Invoice No
- Once payment comes in, Grant Accounting applies it & integration creates and applies payment in OnCore
 - Automated from OnCore user perspective.

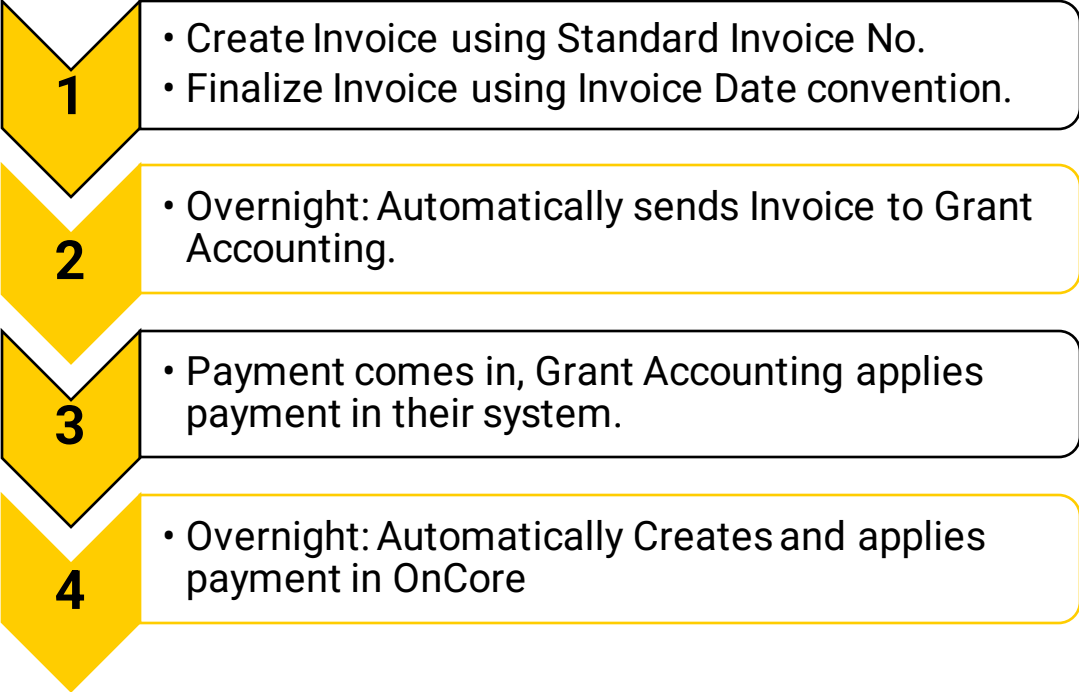
Manual Process

- Leeway on exact process, but a few things hold true
- *Invoice No* **MUST** use one of a few prefixes:
 - TEST
 - CATCHUP
 - MANUAL
- Must manually input/track payments.

Standard vs Manual Process

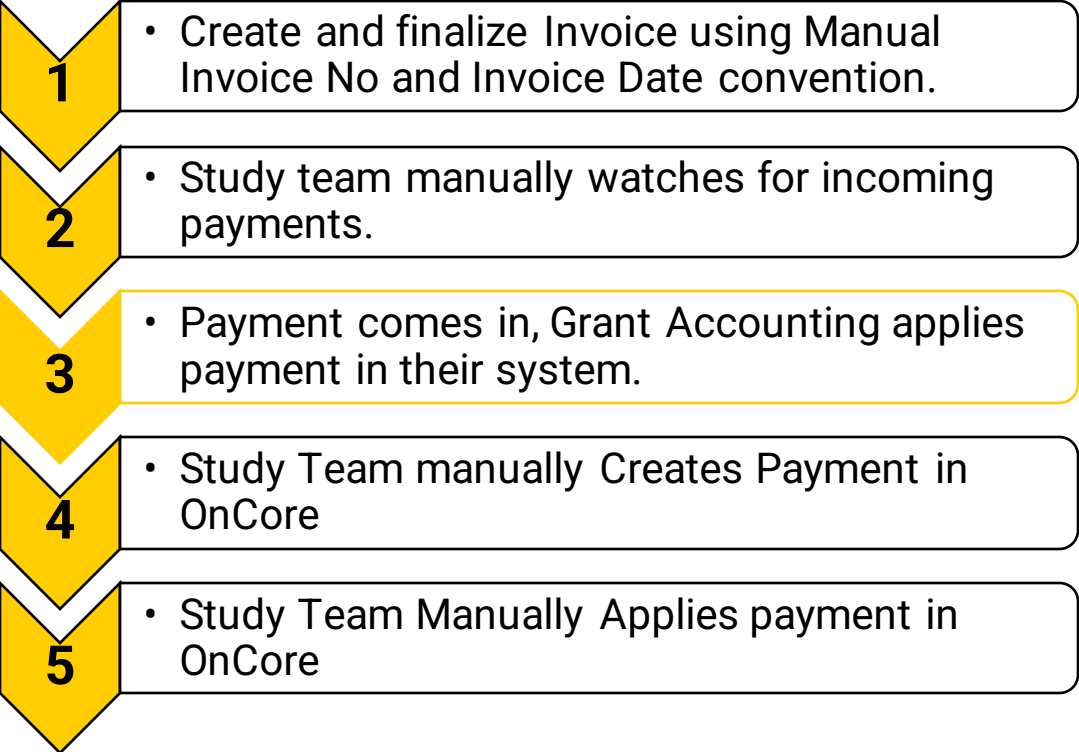
Standard

Invoice Date: Same day you are finalizing Invoice



Manual

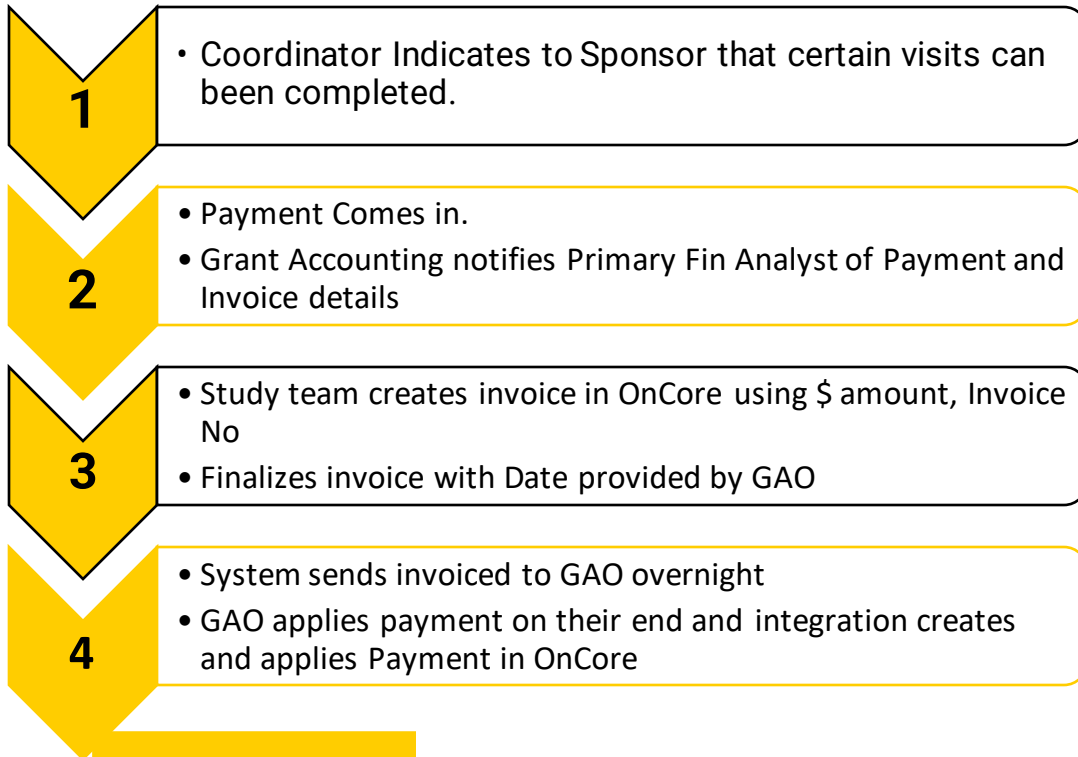
Invoice Date: Depends on situation.



RETRO vs Manual Process

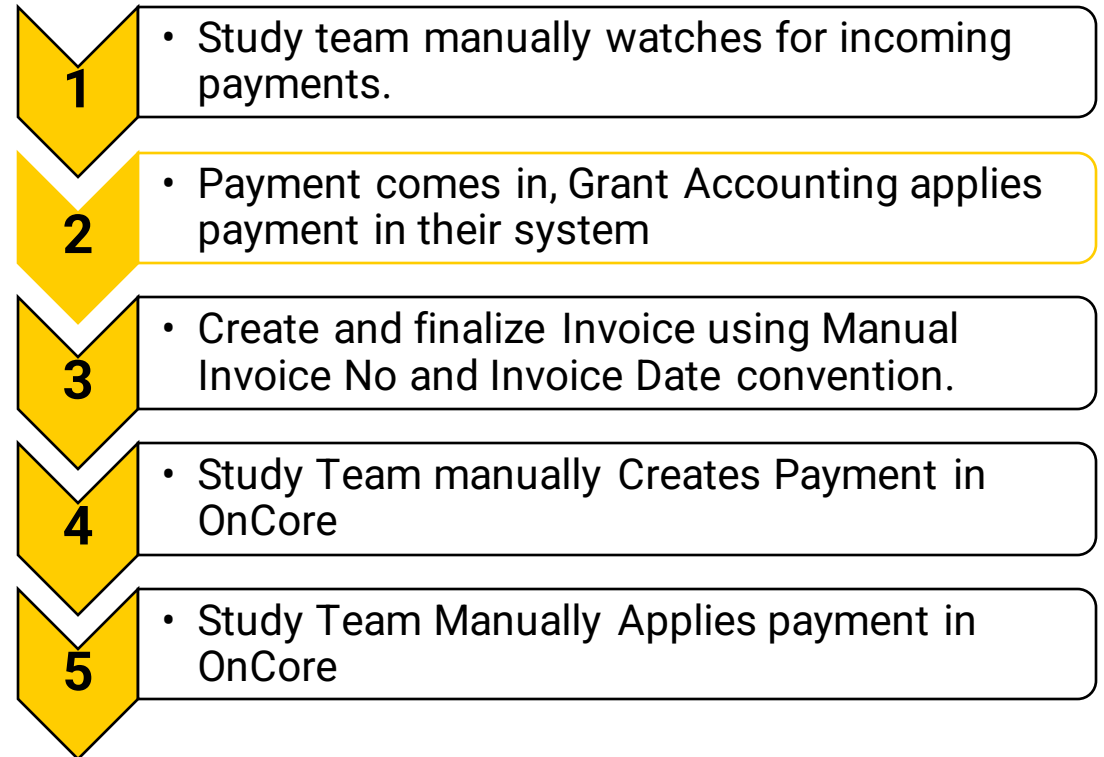
RETRO

Invoice Date: Date GAO gives you (payment date)



Manual

Invoice Date: Depends on situation.



eReg Expansion Update

eReg Coming Soon for General Research

- Project status
 - System configuration & validation in process
 - Implementation team meets on a weekly basis
 - Phased roll-out starting in Q1 2024
 - Required training based on role

Resources

More information about ICTMS

General Research [ICTMS Resources | Institute for Clinical and Translational Science](#)
HCCC [I-CTMS Resources for Oncology Clinical Trials](#)

Q & A Opportunities

[Weekly Office Hours](#) Wednesdays 9 - 10am
Monthly ICTMS Community Update

Support

General Research ictms-admin@uiowa.edu
HCCC oc-oncoreadmin@healthcare.uiowa.edu
[Cherwell Ticket Support Request](#)

IOWA

Thank you

Sandra Ahrendsen
Josiah Argo
Shehzad Gill

ictms-admin@uiowa.edu

→ [Institute for Clinical and Translational Science \(uiowa.edu\)](https://uiowa.edu/ictms)