

# OnCore New Version of Charge Master



OCR Tip Sheet

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## DESCRIPTION:

This document explains and demonstrates the requirements for creating a new version of the Charge Master. New protocols will automatically have the newest version. Current protocols that have not released their budget or calendar, can be moved to a new Charge Master. Any current protocols that are past their released budget or calendar, and have received an Amendment, must contact [OCR\\_Finance@URMC.Rochester.edu](mailto:OCR_Finance@URMC.Rochester.edu) to create a new version of the budget prior to creating a new Charge Master version.

## OnCore Console >> Pathway

- Financials >> Financials Console > Protocol Related

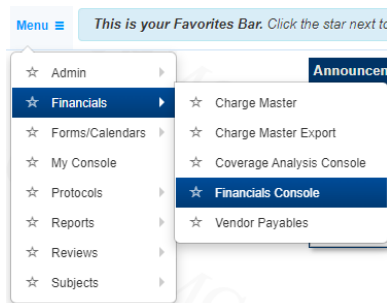
## OnCore Creating a New Version of the Charge Master

### New Protocols

All New protocols will have the most current version of the Charge Master associated with it automatically.

### Open Protocols without a Released Budget / Calendar

Using the main OnCore Menu, select Financials, then select Financials Console.



After navigating to your protocol, select the Protocol Related tab on the left, then click update.

| Event Code    | Additional ID | Event Description               | Comments | Retail    | Research  | Negotiated | Variable  | Initiation | Invoiced |     |
|---------------|---------------|---------------------------------|----------|-----------|-----------|------------|-----------|------------|----------|-----|
| ADMIN START 3 |               | Level 3 Administrative Start-Up |          | 19,500.00 | 19,500.00 |            | 15,000.00 | Yes        | No       | Yes |
| ADV FEE       |               | Advertising Fees                |          | 5,000.00  | 5,000.00  |            | 5,000.00  | Yes        | No       | Yes |
| DOC STOR      |               | Document Storage                |          | 3,250.00  | 3,250.00  |            | 2,000.00  | Yes        | No       | Yes |
| SCRN FAIL     |               | Screen Failures                 |          |           |           |            | 1,900.00  | Yes        | No       | Yes |
| IRB ADMIN     |               | IRB Admin Fee                   |          |           |           |            | 1,000.00  | Yes        | No       | No  |

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At the bottom of the page, use the drop down to select the version of the Charge Master, then click the Update Charge Master Version button.

The screenshot shows the 'Financials Console' interface. At the top, it displays contract and protocol information: Contract No. CAR114, Protocol No. CAR114, Library: Medicine, PI: Investigator, Irene, Sponsor: V-Wave, Ltd, Accrual To Date: 8, and Status: OPEN TO ACCRUAL. Below this is a table of charge master items with columns for Event Code, Additional ID, Event Description, Comments, Retail, Research, Negotiated, Variable, Inflation, Indirect, and Delete. The items listed are: ADMIN START 3 (Level 3 Administrative Start-Up), ADV FEE (Advertising Fees), DOC STOR (Document Storage), SCRIN FAIL (Screen Failures), and IRB ADMIN (IRB Admin Fee). At the bottom of the interface, there is a dropdown menu for 'Charge Master Version' set to '2 (10/07/2021)' and an 'Update Charge Master Version' button, both highlighted with a red box. Other buttons like 'Submit', 'Clear', 'Close', 'Budget Summary', and 'Budget Calendar' are also visible.

After choosing the newest version of Charge Master, be sure to complete 'Budget Signoff' under the Specifications tab.

## Open Protocols with a Released Budget / Calendar

If there are Amendments made to the budget, contact [OCR\\_Finance@URMC.Rochester.edu](mailto:OCR_Finance@URMC.Rochester.edu) to create a new budget version. Once the budget has been created, released and is now editable, the Charge Master version can be updated using the same steps as listed before.