

ONCORE FINANCIALS GUIDANCE FOR STUDY TEAMS PRIOR TO APPLICATIONS SUBMITTED TO OCRICC

Effective July 10, 2023, Froedtert & the Medical College of Wisconsin are implementing OnCore Financials to standardize workflows and enhance the way clinical research is conducted across the organization.

The MCW Office of Research (MCW OOR) is now requiring use of OnCore for all new studies that involve Froedtert Health Charges and/or MCW Professional Charges requiring Epic billing. For all other new studies, protocol entry into OnCore is ***strongly recommended*** per the [OnCore protocol decision tree](#). Please refer to the [OnCore Financials Toolbox](#) for an overview of the Financial Lifecycle, training information, companion guides and video demos to guide you through this new workflow.

To facilitate Financials implementation, MCW OOR is defining “New” protocols as those that have not yet initiated any pricing/budget components as of 7/10/23. Studies that have not initiated these activities are required to follow the new process via OnCore. If Budget Development/Pricing activities already been initiated prior to 7/10/23, then pre-reviews must occur with the MCW OOR to determine if the study meets criteria per the [OnCore protocol decision tree](#). Through this pre-review process, the OnCore Financials team will verify with research teams whether budget work has already been initiated. If applicable, the MCW OOR will follow-up with an exception memo to permit OCRICC review outside of the new OnCore requirement. This documentation should be provided to OCRICC at the time of request for Administrative Approval Application. This practice will be temporary as MCW continues to reinforce adoption of OnCore going forward.

Any ***new protocol submissions*** for OCRICC Administrative Approval via the existing process prior to OnCore Financials go-live (i.e. OnCore entry not required) are allowable ONLY if budget development start-up activities have been initiated prior to 7/10/23 and will require an exception memo from the MCW OOR to be submitted with the application.

If an OCRICC Administrative Approval application is submitted and an OnCore protocol and/or calendar is not found as expected per the [OnCore protocol decision tree](#), and no exception memo is received, the submission will be placed on hold. Study teams will be redirected to the MCW OnCore Financials team to either complete the necessary steps required per the new process or obtain an exception memo to permit review outside of OnCore requirement.

Please contact the MCW Financials Team at oncore@mcw.edu with questions.

New Studies Prior to 7/10/2023	New Studies After 7/10/2023
IF Budget Development/Pricing already initiated, THEN: <ul style="list-style-type: none">Requires OOR Preview/Exception memo prior to OCRICC application submissionDoes not require entry into OnCore Financials now—will be entered with legacy study backfill in coming months	IF NO Budget Development/Pricing Initiated, THEN: <ul style="list-style-type: none">No OOR Preview requiredRequires OnCore entry, including completed calendar/billing grid <u>prior to</u> OCRICC application submission via the new processPlease refer to the OnCore Financials Toolbox for resources to guide you through this process