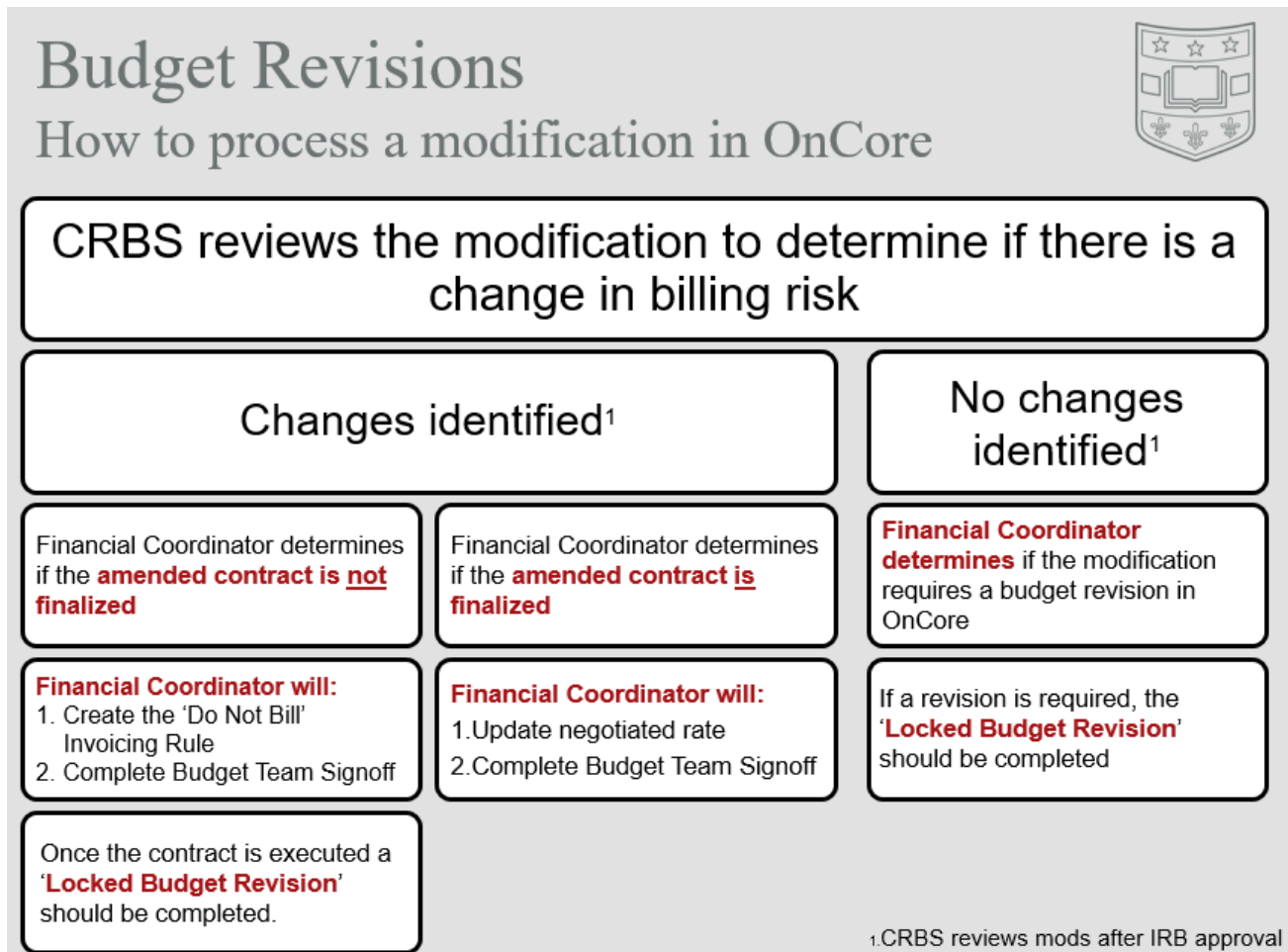


f. Budget Revisions



New Budget Version

New Budget Versions are necessary when there is a budget revision needed for a study with a released calendar

1. From the Home Page navigate to the **Financials menu > Financials Console > Select Protocol**
2. Select the **Subject Related** vertical tab
3. Click on the **New Budget Version** button at the bottom of the page
4. The New Budget Version pop up window will appear asking: Do you wish to lock the budget events in the new version?

New Budget Version ✕

Do you wish to lock the budget events in the new version?

Yes, lock the budget events. Occurred visits will be updated retroactively.

No, do not lock the budget events. Occurred visits will not be updated retroactively.

OK
Cancel

5. Select: Yes, lock the budgets events. Occurred visits will be updated retroactively
 - a. Financial Coordinators should only complete Locked Budget versions
 - b. If you feel that an Unlocked Budget version is needed, contact CCSBillingMatrix@wusm.wustl.edu.

New Budget Version Options in OnCore

		LOCKED	UNLOCKED
Parameters	Rate Base	Editable	Editable
	Edit Sponsor	Editable	Editable
	Edit Indirect Settings [^]	NOT Editable	NOT Editable
	Set Overhead/Indirect Rate	Editable	Editable
	Set Screening Failures Parameters [^]	NOT Editable	NOT Editable
	Set OSR/SAE Parameters	Editable	Editable
	Invoicing Reminders	Editable	Editable
	Withholding Percentage [^]	NOT Editable	NOT Editable
Budget/ Coverage Analysis	Roll Up Item Charge Setting	Editable	Editable
	Protocol Related Events	Always Editable; No new budget required	
	Protocol Events – Variable Checkbox	Editable	Editable
	Charge Master Version – Protocol Events	Editable	Editable
	Charge Master Version – Subject Events	Editable	Editable
	Update Negotiated Amount for events	Editable	Editable
	Applying Indirect to an event	Editable	Editable
	Add/Remove Events	NOT Editable	Editable
	Change Charge Type	NOT Editable	Editable
	Change SOC Modifier	NOT Editable	Editable
	Change Billing Designation	NOT Editable	Editable
	Editing Procedure Alternatives	NOT Editable	Editable
	Modify Cost Centers	Editable	Editable
	Add Budget Only Event	Editable	Editable
Edit Visits/Schedules for Budget Only Event	NOT Editable	Editable	
Effective Date	Past, present or future	Present or future only	
Milestones	Add/Delete Milestones	Editable	Editable
	Adjust Milestone Amount	Editable	Editable
Subject Visits	Occurred Visits	Will be updated retroactively	Will not be updated retroactively. If you need to make changes retroactively, manually delete visit check-in and then mark visit as occurred.

[^] Editable until first invoice is created.

6. After you have completed entering your budget revisions, you will need to release the budget by navigating to the Subject Related tab, scrolling to the bottom and entering an Effective Date and clicking Release Budget.
 - a. If this is an unlocked budget version, you will need to enter the current or a future date for the budget release.
 - b. If this is a locked budget version, you can backdate the budget release, but it must be after the date of the last budget release.

Select Protocol
INVOICES-024

Parameters

Budget

Protocol Related

Subject Related

Receivables

Milestones

Invoiceable Items

Invoicing Rules

Invoices

Receipts

Visit Variations

Attachments

V1 (Released) + Effective 2/24/2020

Clinical Procedure/Lab (Events Locked) Charge Master Version: 2 (01/01/1991)

Procedure Expand All Collapse All	Charge			Charge Type
	Retail	Research	Negotiated	
[-] -NKTR-214				M
[-] -Nivolumab				M
[-] Drug Administration				S1
[-] Hematology (CBC)				S1
[-] Chemistry (CMP)				S1
[-] Direct Bilirubin				M
[-] Creatine Kinase				M
[-] TSH_CON			94.50	P
[-] Lipase				M
[-] Amylase				M
[-] Pregnancy Test CON,F2			50.00	P/S1
[-] Hepatitis C antibody F1			150.00	P
[-] FSH				M
[-] Urinalysis				S1
[-] Tumor Assessments TBD				P
[-] RECIST			300.00	P
[-] Physical Exam				S1
[-] EKG				M
[-] ECHO/MUGA				M
[-] Cystoscopy				S
[-] Tumor Samples				M
[-] Surgery				S1

Foot Notes [Add](#)

Index	Footnote	
CON.	Conditional Procedure, mark N/A if this did not occur.	
F1.	Invoice sponsor when complete	Edit Delete
F2.	SOC at Screening, conditional on treatment.	Edit Delete
TBD.	Procedure is TBD; select SOC designation if applicable.	
a.	Cycle Length: 21 Days	
b.	Contractual Limit: no limit	
c.	Hotel/Lodging: For patients traveling more than 50 miles one way from the facility.	
e.	Mileage: For patients traveling more than 50 miles one way from the facility.	
f.	Monitoring Fees: Sponsor did not agree to reimburse for monitor visits, remote monitoring, monitor cancellations	

2 (01/01/1991) [Update Charge Master Version](#)

Select Budget Procedures

Effective Date

[Release Budget](#) [Delete Budget](#)