



CRA Console Event Trigger

Tracking and Invoicing Protocol-Related Items

Roles Affected:
Financial Coordinator, CRA

What is an Event Trigger?

An event associated with a **Protocol-Related Financial Item** that allows the item to become available for invoicing when the associated event is achieved for the protocol.

An event trigger can be applied to any Protocol-Related Item in the Financials Console.

How does the CRA Console Event Trigger work?

Step 1: Financial Coordinator

Apply the **trigger type** of **CRA Console** to the Protocol-Related Item in Financials Console.

Step 2: CRA

Add the event in the new **Financial Events Tab** in the **CRA Console**. Enter the **Occurred Date** and **Count**. Once you click Add, the item becomes available for invoicing in the Invoiceable Items tab of the Financials Console.

Why is this important?

This feature streamlines communications between Financial and Clinical Teams, allowing CRAs to mark Protocol-Related Items as Occurred (e.g., **Monitor Visits**), increasing efficiency and reducing error in financials invoicing.

The screenshot displays the CRA Console interface for Protocol No. OSTTEST-EMS-001. The 'Financial Events' tab is selected in the left sidebar. The main area shows a table of Financial Events with columns for Occurred Date, Event, Submitted By, and Comments. Two entries are visible: Monitor Visits on 03/14/2019 and 12/13/2018, both submitted by Schuster, Emily. An 'Add Financial Events' form is overlaid on the right, with fields for Financial Event (dropdown), Occurred Date (calendar), Count (input field with '1'), and Comments (text area). The 'Add' button is at the bottom right of the form.

Occurred Date	Event	Submitted By	Comments
03/14/2019	Monitor Visits	Schuster, Emily	
12/13/2018	Monitor Visits	Schuster, Emily	

2 Total Records

