

Stanford University



CRISP

Clinical Research Invoicing
System for Participants



CRISP User Guide

Clinical Research Invoicing System for Participants

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Overview

What is CRISP?

Clinical Research Invoicing System for Participants (CRISP) supports the communication between the School of Medicine Departments and Sponsored Receivables Management Group (SRM).

Why CRISP?

CRISP converts clinical data into a financial receivable. A financial receivable lets Stanford know that the study's sponsor owes money to Stanford. The receivable is canceled when payment is applied against the receivable.

CRISP enables the tracking of subject visits, procedures and invoiceables, which are based on the external budget and the payment terms & conditions of the agreement. Invoices should be processed through CRISP prior to SRM receiving the payment. This applies to both subject fees processed through Case Report Forms (CRFs) and invoiceable items.

IMPORTANT TO REMEMBER: SRM's Collection team follows up on all unpaid receivables. Even though an invoice marked as a CRF will not be sent, it is critical to create invoice requests to record the receivable on the books in order to follow up on the expected payments.

How are Studies Entered into CRISP

Once a Notice of Award (NOA) is issued for an industry sponsored clinical trial, the SPO will show up on the CRISP dashboard. Individuals who will initially have access to the record are the Financial Administrator and Clinical Trial Coordinator listed in the Administrative Contacts in SeRA, as well as Accounts Receivables personnel.

An email, including the initial NOA and instructions on commencing the study in CRISP, will be sent by SRM to the Award Manager listed in Oracle.

The Financial Specialist has the ability to add other users or deactivate users who have left the department.

Getting Started

1. Read the Award Agreement to locate:

- The award Start date
- Fee Schedule
- External Budget

2. Access CRISP by navigating to <https://crisp.stanford.edu> on your internet browser.

3. Enter your SUNet ID and Password then click [Login].



The image shows the Stanford University WebLogin page. At the top, it says "STANFORD UNIVERSITY". Below that is the "WebLogin" heading with a link "(what is this?)". There are two input fields: "SUNet ID:" and "Password:". A "Login" button is positioned below the password field. A link for "Advanced settings" is located below the login button. At the bottom of the form, there is a section for "Important Security Information" and a "Caution" note. The footer of the page reads "© Stanford University. All Rights Reserved."

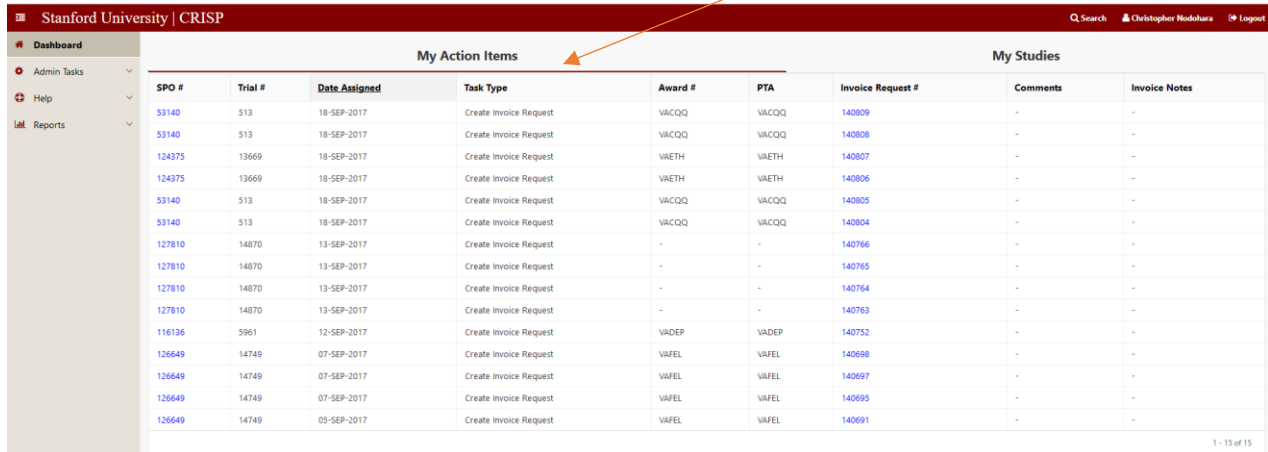
4. You should now be at the CRISP Initial Landing Page. Click **Proceed**.



The image shows the CRISP landing page. The header is "Stanford University | CRISP". On the left, there is a "Help" dropdown menu. The main content area features the CRISP logo, which includes a tree icon inside the letter 'I', and the text "Clinical Research Invoicing System for Participants". To the right of the logo is a photograph of a building with a series of arches. Below the logo and photo, there is a red-bordered box containing the text: "CRISP has a new look! The system has been enhanced to improve user experience. A few notable changes you will see are - the trials are now organized by SPO Number, pages have been rearranged in a more logical order, and you now have the ability to add multiple fee schedules to an Invoice Request. To explore all of the new features and updates, please click on the 'Help' link in the left-hand navigation column to watch a full video demo and view the updated User Guide." Below this box, there is a paragraph of text: "Clinical Research Invoicing System for Participants (CRISP) supports communication between the School of Medicine Departments and the Sponsored Receivables Management Group (SRM). CRISP enables tracking of patient events and invoiceable items on all sponsored clinical trials, and facilitates the processing of sponsor invoices." Another paragraph follows: "If you need help, please submit requests by clicking on the Help/HelpSU link on the left side of the page, or by calling (650) 725-0086." At the bottom of the page, there is a red button labeled "Proceed".

Accessing Your Studies

Dashboard - There are two tabs under the dashboard: **My Action Items** and **My Studies**. The dashboard opens with the default view of My Action Items. The red line under the title indicates your current view.



Stanford University CRISP									
Search Christopher Nebulera Logout									
Dashboard	My Action Items					My Studies			
	SPO #	Trial #	Date Assigned	Task Type	Award #	PTA	Invoice Request #	Comments	Invoice Notes
	53140	513	18-SEP-2017	Create Invoice Request	VACQQ	VACQQ	140809	-	-
	53140	513	18-SEP-2017	Create Invoice Request	VACQQ	VACQQ	140808	-	-
	124375	13669	18-SEP-2017	Create Invoice Request	VAETH	VAETH	140807	-	-
	124375	13669	18-SEP-2017	Create Invoice Request	VAETH	VAETH	140806	-	-
	53140	513	18-SEP-2017	Create Invoice Request	VACQQ	VACQQ	140805	-	-
	53140	513	18-SEP-2017	Create Invoice Request	VACQQ	VACQQ	140804	-	-
	127810	14870	13-SEP-2017	Create Invoice Request	-	-	140766	-	-
	127810	14870	13-SEP-2017	Create Invoice Request	-	-	140765	-	-
	127810	14870	13-SEP-2017	Create Invoice Request	-	-	140764	-	-
	127810	14870	13-SEP-2017	Create Invoice Request	-	-	140763	-	-
	116136	5961	12-SEP-2017	Create Invoice Request	VADEP	VADEP	140752	-	-
	126649	14749	07-SEP-2017	Create Invoice Request	VAFEL	VAFEL	140698	-	-
	126649	14749	07-SEP-2017	Create Invoice Request	VAFEL	VAFEL	140697	-	-
	126649	14749	07-SEP-2017	Create Invoice Request	VAFEL	VAFEL	140695	-	-
	126649	14749	05-SEP-2017	Create Invoice Request	VAFEL	VAFEL	140691	-	-

My Action Items - The **My Action Items** page provides a list of items that require your attention.

My Studies - The **My Studies** page provides a list of all studies linked to your authority.

1. Click on **My Studies** to see a list of all of your studies.

Note: You will automatically have access if your name is listed in the Administrative Contacts in SeRA as the Financial Specialist or Study Coordinator.

- a. You can filter on any of the columns in the **My Studies** page, or use the search box at the top of the page to find specific studies.

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Q Search Christopher Hobbhara Logout

My Action Items My Studies

SPO #	Trial #	Short Name	Subjects	Invoices	PI	PTA	Award#	Setup Complete?	Sponsor	Org Code
117373	14889	117373	Subjects(0)	Invoices(0)	Reiman, David A.	1184490-100-SXCHA	SXCHA	Y	University of Illinois at Urbana Champaign	NDQN
130325	14871		Subjects(0)	Invoices(3)	Ruoss, Stephen J.	VAEPL	VAEPL	Y	Novartis Pharmaceuticals Corp	WXAA
127810	14870		Subjects(0)	Invoices(4)	Shah, Ami				Pharmalytics, LLC	XLFK
126845	14869		Subjects(0)	Invoices(0)	Kumari, Radhika				Mallinckrodt, Pharmaceuticals, Inc.	WHY
123244	14849		Subjects(0)	Invoices(0)	Nguyen, Mindie H.		UBGJUJ	Y	Gilead Sciences	WHY
126697	14829		Subjects(0)	Invoices(0)	Agarwal-Hashmi, Rajni				Jazz Pharmaceuticals	XLFK
127585	14809		Subjects(0)	Invoices(2)	Kuntz, Pamela				Merck Co., Inc.	WUZG
125900	14789		Subjects(0)	Invoices(0)	Fisher, George Albert, Jr				Roche TCR, Inc.	WUZG
128658	14770	VAFEQ	Subjects(2)	Invoices(2)	Spunt, Sheri	VAFEQ	VAFEQ		Children's Hospital of Pennsylvania	XOXC
127121	14769		Subjects(0)	Invoices(0)	Desai, Atman				InVivo Therapeutics Corp	XCNG
126649	14749		Subjects(0)	Invoices(4)	Lock, Christopher Bruce	VAFEL	VAFEL	Y	Novartis Pharmaceuticals Corp	XBYE
127741	14729		Subjects(0)	Invoices(0)	Colevas, Dr. A. Dimitrios	VAFEK	VAFEK	Y	CellSight Technologies, Inc	WUZG
127340	14709		Subjects(0)	Invoices(0)	Holsinger, Dr. Chris				Intuitive Surgical	XWUY
128500	14691		Subjects(0)	Invoices(0)	Ahmed, Aijaz, M.D.				Gilead Sciences	WHY
127848	14690		Subjects(0)	Invoices(0)	Nguyen, Mindie H.				Gilead Sciences	WHY
127314	14689		Subjects(0)	Invoices(1)	Fan, Dr Alice	VAFEE	VAFEE	Y	Calithera Biosciences, Inc.	WUZG
128552	14669		Subjects(0)	Invoices(0)	Dake, Michael				Shockwave Medical Inc.	VWES
127821	14649		Subjects(0)	Invoices(0)	Fisher, George Albert, Jr	VAFDX	VAFDX	Y	Forty Seven, Inc.	WUZG
125611	14629		Subjects(0)	Invoices(1)	Reddy, Sunil Arani	VAFDV	VAFDV	Y	Delcath Systems, Inc.	WUZG
127370	14609		Subjects(0)	Invoices(0)	Genovese, Mark	VAFDT	VAFDT	Y	EE Lilly And Company	WPEN
124986	14589	Genentech - Oreizumab - Relapsing MS (RMS)	Subjects(1)	Invoices(2)	Lock, Christopher Bruce	UBGTH	UBGTH	Y	Genentech, Inc.	XBYE
127727	14569		Subjects(0)	Invoices(1)	Fisher, George Albert, Jr	VAFDP	VAFDP	Y	The Johns Hopkins University	WUZG

2. You can also access a study from any page in the application by using the global **Search** located in the top right-hand corner.

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Q Search Benjamin R. Holyomes Logout

My Action Items My Studies

SPO #	Trial #	Short Name	Subjects	Invoices	PI	PTA	Award#	Setup Complete?	Sponsor	Org Code
127761	14909									XIXC
117373	14889									NDQN
130325	14871									WXAA
127810	14870									XLFK
126845	14869									WHY
123244	14849									WHY
126697	14829									XLFK
127585	14809									WUZG
125900	14789									WUZG
128658	14770									XIXC
127121	14769									XCNG
126649	14749									XBYE
127741	14729									WUZG
127340	14709									XWUY
128500	14691									WHY

Search

Search By: Principal Investigator SPO # Award # X Search

SPO#	Short Name	Subjects	Invoices	PI Name	Sponsor	PTA	Award#
105901	Inventational	Subjects(0)	Invoices(11)		Seattle Children's Hospital	UBCHX	UBCHX
109277	Phase 2	Subjects(8)	Invoices(26)		KaloBios Pharmaceuticals, inc.	VACXW	VACXW
114142	Vertex 809-011 Part B	Subjects(4)	Invoices(7)		Vertex Pharmaceuticals, Inc.	VADJD	VADJD
114502	Vertex 661-103	Subjects(2)	Invoices(14)		Vertex Pharmaceuticals, Inc.	VADDS	VADDS
119562	Vertex 661-108 Phase 3	Subjects(7)	Invoices(3)		Vertex Pharmaceuticals, Inc.	VADLQ	VADLQ
120674	Vertex 809-109	Subjects(3)	Invoices(16)		Vertex Pharmaceuticals, Inc.	VADOE	VADOE
120963	Vertex 809-110 Rollover study	Subjects(6)	Invoices(14)		Vertex Pharmaceuticals, Inc.	VADNC	VADNC
121504	Vertex 661-110	Subjects(3)	Invoices(11)		Vertex Pharmaceuticals, Inc.	VADQT	VADQT
124084	Parion- Clean	Subjects(3)	Invoices(3)		Parion Sciences, Inc	VAEIQ	VAEIQ
124274	DTI-438-01	Subjects(2)	Invoices(4)	Mills, Colen	Protonix Therapeutics, Inc	VAEEZ	VAEEZ

a. Access a study by clicking the **SPO #** link.

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My Action Items

SPO #	Trial # ↓	Short Name	Subjects	Invoices	PI	PTA
124638	13609	UAT Test	Subjects(0)	Invoices(1)	Dorigo, Oliver	VAESP
124112	13589		Subjects(3)	Invoices(1)	Gurtner, Geoffrey C.	VAESM
127108	13574	Flu Study	Subjects(0)	Invoices(2)	Yang, Samuel S	VAESD
126652	13573	BMT 311_PCYC 1140-IM	Subjects(1)	Invoices(2)	Miklos, David	VAESI
125694	13572		Subjects(0)	Invoices(2)	Genovese, Mark	VAESJ
125309	13571		Subjects(0)	Invoices(1)	Yang, Samuel S	VAESE
124272	13570		Subjects(0)	Invoices(1)	Liedtke, Michaela	VAESH
124271	13569		Subjects(0)	Invoices(2)	Liedtke, Michaela	VAESG
124422	13549		Subjects(0)	Invoices(1)	Sledge, George W., Jr	VAESA
126578	13529	Medpace, Inc	Subjects(0)	Invoices(1)	Nguyen, Linda	VAERS
125442	13510	Paliperidone Palmitate Study	Subjects(0)	Invoices(1)	Noordsy, Douglas L.	VAERO
125048	13509	BI	Subjects(0)	Invoices(2)	Chinthrajah, Sharon	VAERL
124968	13490	Thoraflex	Subjects(0)	Invoices(1)	Fischbein, Michael	VAERJ
124929	13489		Subjects(0)	Invoices(2)	Ganjoo, Kristen N.	VAERH
124598	13470	Cleveland	Subjects(6)	Invoices(1)	Sokol, Dr. Eric R.	1198818-100-U
124849	13469	JTX-2011-101	Subjects(8)	Invoices(5)	Kummar, Shivaani	VAERD
125898	13450	Secukinumab	Subjects(0)	Invoices(1)	Chang, Anne Lynn S., MD	VAEQY
125139	13449		Subjects(5)	Invoices(2)	Goldberg, Jeffrey Louis	VAEQX
126662	13430	AnaptysBio	Subjects(0)	Invoices(4)	Chinthrajah, Sharon	VAEQU
125981	13429	EAP for Nusinersen	Subjects(0)	Invoices(1)	Day, JW	VAEQR

Trial Details

The **Trial Details** page is a summary screen that provides basic information for the study. It is pre-populated from the SeRA system. Some of the information such as **PTA #** and **Award #** are not pre-populated from SeRA, but are entered by SRM.

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Dashboard

SPO # 127370 SPO #127370 Award # VAFDT Project Name:

Trial Details

View Latest NOA

Principal Investigator

SPO # 127370

Project Name

Sponsor

Short Name

PTA # VAFDT

Award # * VAFDT

Installment # * A00

Project # * 1204028

Billing Start Date 25-APR-2017

Billing Frequency Monthly

Budget End Date 24-APR-2019

Comments

Building info 900 BLAKE WILBUR, PALO ALTO(90-978)

Room 2ND FLOOR

Other SHC

Setup Complete? Yes No

Sponsor Details (Optional)

Sponsor Contact

Sponsor Email

Sponsor Phone #

Save Changes

1. You may update the following fields:

- **Short Name** - Study short name or nickname
- **PTA #** - PTA number or Oracle 5-alpha award number
- **Billing Start Date** - Default award start date

- **Billing Frequency** - Default billing frequency
- **Budget End Date** - Default award end date
- **Setup Complete?** - The default is “No.” The Financial Specialist can change to “Yes” after the **Fee Schedule** and **Visit Procedures** are completed. Once the **Setup Complete?** is marked “Yes,” the Study Coordinator can enter visits.
- **Comments** - A free form field for notes such as Sponsor withhold amount/percentage

2. Click on the **Save Changes** button when completed.

Fee Schedule

There will be no fees listed on a brand new award. The department CRISP user must input the data. An invoice cannot be created for an item if it is not on the **Fee Schedule**. There is a pull down menu on the invoice that comes from the **Fee Schedule**.

1. To add a fee, click on the **Add Row** button and enter the following information:

- **Name** - Name of fee. Please use the **exact** same descriptions as the **External Budget**. This reduces confusion when the sponsor receives the invoice.
- **Start Date** - Defaults to today’s date but can be changed to the award start date or other date
- **End Date** - May be left blank unless the fee amount changes and a new fee needs to be added
- **Fee Type** - One of the following fee types
 - Per Subject Costs
 - Additional Subject Costs - Invoiceable subject costs
 - Other Study Related - IRB or one-time fees
 - Study Start-up Fees - One-time start up fees
- **Fee** - Fee amount from award document in whole dollars. No dollar sign (\$), period (.) or comma (,). The field will be formatted automatically.

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Dashboard

SPO # 107699 SPO #107699 Award # VACWC Project Name: Principal Investigator:

Fee Schedule

Visits

Subjects

Trial Users

Invoice Requests

Trial Attachments

Admin Tasks

Help

Reports

Fee Schedule

Pre-Populate

Go Actions Edit Save Add Row

	Name ↑	Start Date ↑	End Date	Fee Type ↑	
<input type="checkbox"/>	Staff Study Initiation Training Time	25-SEP-2012	-	Other Study Related Fees	250.00
<input type="checkbox"/>	IRB protocol amendment fee	25-SEP-2012	-	Other Study Related Fees	320.00
<input type="checkbox"/>	Investigator Study Initiation Training Time	25-SEP-2012	-	Other Study Related Fees	500.00
<input checked="" type="checkbox"/>	Screen Failure	25-SEP-2012	-	Other Study Related Fees	640.00
<input type="checkbox"/>	Advertising Costs	25-SEP-2012	-	Other Study Related Fees	2,560.00
<input type="checkbox"/>	Surgery/Treatment	25-SEP-2012	-	Per Subject Cost	832.00
<input type="checkbox"/>	9 Months Post-Operative Visit	25-SEP-2012	-	Per Subject Cost	960.00
<input type="checkbox"/>	1 Month Post-Operative Visit	25-SEP-2012	-	Per Subject Cost	960.00
<input type="checkbox"/>	Pre-Operative Visit	25-SEP-2012	-	Per Subject Cost	1,280.00
<input type="checkbox"/>	3 Months Post-Operative Visit	25-SEP-2012	-	Per Subject Cost	1,408.00
<input type="checkbox"/>	12 Months Post-Operative Visit	25-SEP-2012	-	Per Subject Cost	1,536.00
<input type="checkbox"/>	6 Months Post-Operative Visit	25-SEP-2012	-	Per Subject Cost	1,600.00
<input type="checkbox"/>	24 Months Post Operative Visit	25-SEP-2012	-	Per Subject Cost	1,680.00
<input type="checkbox"/>	Study Startup Fee	25-SEP-2012	-	Study Start-up Fees	2,500.00
<input type="checkbox"/>	Budget Development Fee	25-SEP-2012	-	Study Start-up Fees	2,560.00
<input type="checkbox"/>	Initial IRB Review Fee	25-SEP-2012	-	Study Start-up Fees	2,560.00
<input type="checkbox"/>	Rigid Contact Lens Kit from ABB Concise	01-MAR-2013	-	Other Study Related Fees	225.20
<input type="checkbox"/>	9 Months	20-DEC-2013	-	Per Subject Cost	480.00
<input type="checkbox"/>	12 Months	20-DEC-2013	-	Per Subject Cost	768.00
<input type="checkbox"/>	24 Month Post Operative Visit	27-FEB-2015	-	Per Subject Cost	1,680.00

2. Fees can also be added by clicking on the **Pre-Populate** button. This will bring up a list of pre-defined fee names. The fee amount and start date will still need to be entered.

3. Click the **Save** button when completed.

4. To change information that has already been saved, click the **Edit** button, then select the field that you would like to edit. Enter the correct information and click **Save**.

Additional Information:

- The fee information comes from the approved **External Budget**.
- **Start-up Fees** - The department must enter these into CRISP to initiate the invoice.
- **IRB Annual Renewal** - Departments are required to attach a copy of the IRB approval letter on the invoice screen.
- Not all procedures need to be listed on the **Fee Schedule** if they are included as part of the visit (i.e. If three procedures are always done during Visit 1, the three procedures would be listed as "Visit 1" rather than three separate procedures).

Reminder: If a cost has been negotiated to be reimbursed outside of the **External Budget**, please include a written note from the sponsor agreeing to the reimbursement.

Visits

The **Visits** page records the type of procedure performed at each visit.

The screenshot shows the 'Visits' page in the CRISP system. The header includes 'Stanford University | CRISP' and navigation links for Dashboard, SPO # 107699, Award # VACWC, Project Name, and Principal Investigator. The main content area is titled 'Visit Procedures' and contains a table with the following data:

Visit #	Visit Name	Procedure
Visit 1	Pre-Operative Visit	Pre-Operative Visit
Visit 2	Surgery/Treatment	Surgery/Treatment
Visit 3	1 Month Post-Operative Visit	1 Month Post-Operative Visit
Visit 4	3 Months Post-Operative Visit	3 Months Post-Operative Visit
Visit 5	6 Months Post-Operative Visit	6 Months Post-Operative Visit
Visit 6	9 Months Post-Operative Visit	9 Months Post-Operative Visit
Visit 7	12 Months Post-Operative Visit	12 Months Post-Operative Visit
Visit 8	24 Months Post-Operative Visit	24 Months Post Operative Visit
Visit 9	9M	9 Months
Visit 10	12M	12 Months

At the bottom of the table, there is a pagination indicator '1 - 10' and an 'Add Visit' button.

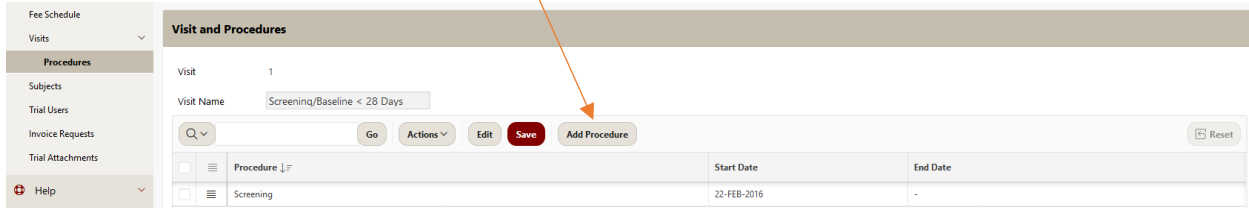
1. To add a visit, click the **Add Visit** button. The visits always start from Visit 1.
2. To add a **Visit Name**, enter appropriate visit name (i.e. *Baseline for Visit 1, Pre-Operative Visit* or just *Visit 1*), and click the **Save** button. Visits can also be **Edited, Cloned** or **Deleted**.

The screenshot shows the 'Add Visit' form in the CRISP system. The header includes 'Stanford University | CRISP' and navigation links for Dashboard, SPO # 107699, Award # VACWC, Project Name, and Principal Investigator. The main content area is titled 'Visit and Procedures' and contains a form for adding a new visit. The form includes a 'Visit' dropdown set to '1', a 'Visit Name' input field containing 'Pre-Operative Visit', and buttons for 'Go', 'Actions', 'Edit', 'Save', and 'Add Procedure'. Below the form is a table with the following data:

Procedure	Start Date	End Date
Pre-Operative Visit	25-SEP-2012	-
12 Months Post-Operative Visit	20-SEP-2017	-

At the bottom of the form, there are buttons for 'Save Changes', 'Clone Visit', and 'Delete Visit'. Three orange arrows point from the text in the previous list to the 'Save' button, the 'Clone Visit' button, and the 'Delete Visit' button.

3. To add a procedure, click the **Add Procedure** button. Select a procedure from the pull down menu and enter the appropriate dates. This must be setup together with the visit.



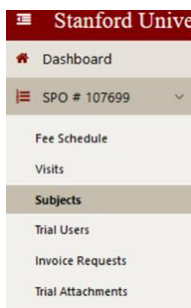
4. Click the **Save** button when completed.

Additional Information:

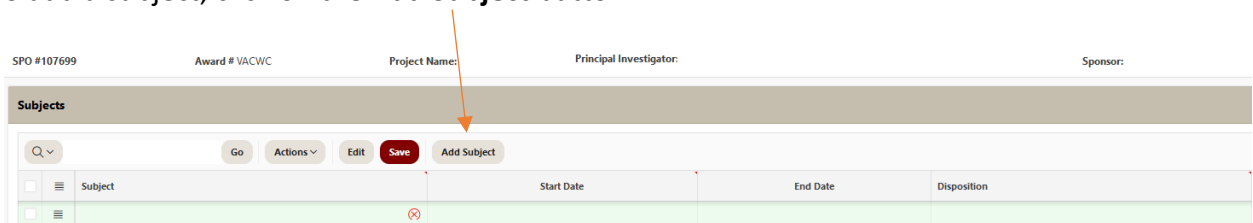
- The procedure must be on the **Fee Schedule**, or it will not be listed on the pull down menu. If the item is not listed, go back to the **Fee Schedule** and add the procedure.
- The procedure name can be the same as the **Visit Name**.

Subjects

The **Subjects** page provides a list of subjects involved in the study. This is the function handled by the Study Coordinator. The Study Coordinator cannot add Subjects until the Financial Specialist has added the **Fee Schedule** and **Visits**.



1. To add a subject, click on the **Add Subject** button.



a. Enter the following fields:

- **Subject Identifier** - Usually initials and some digits to identify the subject
- **Subject Start Date** - Defaults to today's date but add actual start date
- **Subject End Date** - If currently enrolled, leave blank.
- **Disposition** - Select appropriate item
 - Completed
 - Death
 - Enrolled
 - Lost to follow Up
 - Screen
 - Screen Failure
 - Withdrawn

b. Click the **Save** button when completed.

2. To add a visit for a particular subject, click the **Visits (#)** link for that subject.

a. Click the **Add Visit** button to add a visit and enter the following fields:

- **Visit Type** - Scheduled or Unscheduled
- **Visit Name** - Pull down menu from the Visits page
- **Visit Date** - Defaults to today's date but enter actual visit date

SPO #107699 Award # VACWC Project Name: Principal Investigator: Sponsor:

Visits for 0001a

Visit	Visit Type	Comments	Visit Date ↑≡	Procedures
Visit 1 - Pre-Operative Visit	Scheduled		01-JUL-2017	Pre-Operative Visit 12 Months Post-Operative Visit
Visit 4 - 3 Months Post-Operative Visit	Scheduled		01-AUG-2017	3 Months Post-Operative Visit

[Download as Spreadsheet](#)

Add Visit **Close**

3. Additional procedures can also be added here.

Visit for 0104-0013 IEA

Subject: 0104-0013 IEA

Visit Type: Scheduled

Visit Name: 1 - Tissue Screening

Visit Date: 27-SEP-2017

Comments:

Close **Save Changes** **Delete**

Subject Visit Procedures

Go Actions Edit Save Add Procedure

Procedure Type	Procedure Name	Complete Flag	Comments
Additional	Tissue Screening	Yes	
Scheduled	Tissue Screening	Yes	

- a. Click the **Save** button when completed.

You have just setup your first Subject and Visit. You can continue setting up Subjects and add their Visits as they are seen. Once you are ready to send the CRF for those subjects seen, create a CRISP invoice and send it to SRM. Subject costs will automatically appear on the invoice, once generated.

***Important:** Please refer to the payment terms based on the terms and conditions of the Agreement. If per patient visit payments are to be reimbursed on a quarterly basis, a Study Coordinator can record the data in CRISP on a daily basis, but route to FS and SRM on a quarterly schedule. This will prevent aging of the receivables prior to it being payable and due.

Trial Users

This is a list of individuals who have access to this study. The Financial Specialist can add or deactivate key users (Financial Specialist or Study Coordinator).

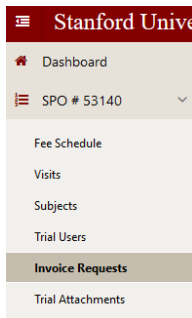
The screenshot shows the 'Trial Users' management page in the CRISP system. The page header includes 'Stanford University | CRISP' and navigation links for Dashboard, SPO # 107699, Award # VACWC, Project Name, and Principal Investigator. The main content area is a table with columns for 'Role' and 'SUNet ID'. The table contains five rows, each with a dropdown menu for the role (currently set to 'Study Coordinator' or 'Accounts Receivables') and an input field for the SUNet ID. At the bottom of the table, there are 'Save Changes' and 'Add User' buttons.

1. To add a user, click the **Add User** button.
2. Select one of the following roles:
 - Accounts Receivables - Role assigned to A/R Management, supervisors, billers & receipts staff
 - Financial Specialist - Role assigned to Department Finance personnel
 - Principal Investigator - Role assigned to PI
 - Study Coordinator - Role assigned to Coordinator working on the study
3. Enter the SUNet ID of the user.
4. Select **“Yes”** to make the user active or **“No”** to deactivate the user.

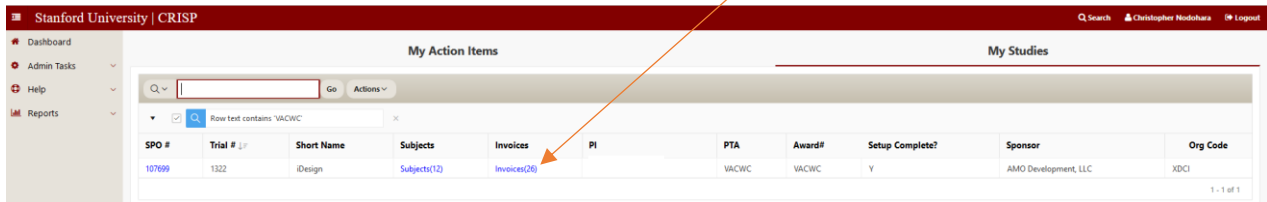
5. Click the **Save Changes** button when completed.

Invoice Requests

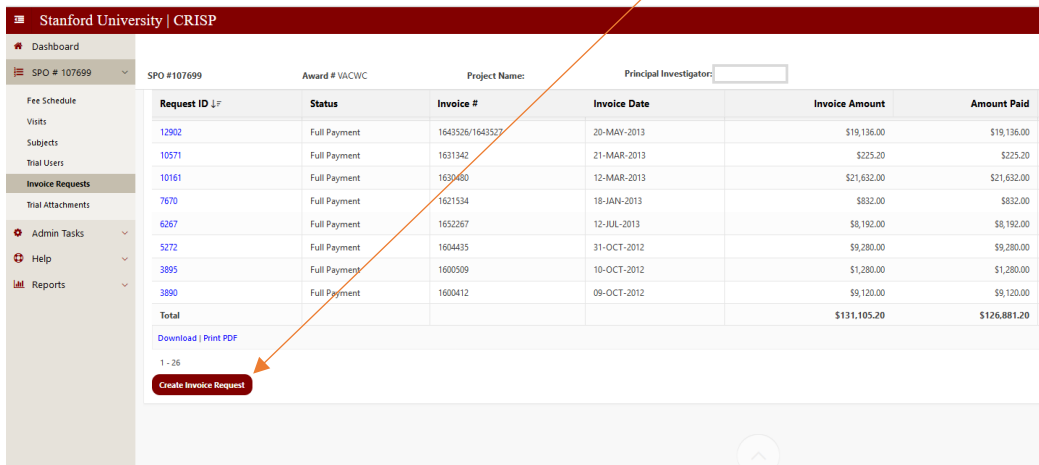
Departments must submit their **Invoice Requests** to Sponsored Receivables Management (SRM) to record the receivable in Oracle.



In addition to the left-hand navigation, you can also get to the Invoice Requests page from the **My Studies** tab of the dashboard by clicking on the **Invoices (#)** link. The invoice can be created by either the Study Coordinator or the Financial Specialist.



1. To create an invoice request, click the **Create Invoice Request** button.



2. Select either Invoiceable Item or Per Subject Cost

The screenshot shows a table of invoice requests for SPO #107699. The table has columns for Request ID, Status, Invoice #, Invoice Date, and Invoice Amount. A modal dialog titled "Invoice Selection" is open, asking the user to select an item to invoice, with options for "Invoiceable Items" and "Per Subject Cost".

Request ID ↓	Status	Invoice #	Invoice Date	Invoice Amount
12902	Full Payment	1643520/1643527	20-MAY-2013	\$19,136.00
10571	Full Payment	1631342	21-MAR-2013	\$225.20
10161	Full Payment	1630480	12-MAR-2013	\$21,632.00
7670	Full Payment	1621534	18-JAN-2013	\$832.00
6267	Full Payment	1652267	12-JUL-2013	\$8,192.00
5272	Full Payment	1604435	31-OCT-2012	\$9,280.00
3895	Full Payment	1600509	10-OCT-2012	\$1,280.00
3890	Full Payment	1600412		120.00
Total				05.20

a. For a **Per Subject Cost** invoice was a **CRF Sent?** Defaults to “No”. Change to “Yes” if a CRF was sent. A CRF will create a Receivable but SRM will not send the invoice to the Sponsor. This invoice request will be for record purposes only.

The screenshot shows a form titled "Per Subject Costs" with a field for "CRF Sent?". The field has a red asterisk and a help icon. Below the field are two radio buttons: "Yes" and "No". The "No" radio button is selected.

***Important:** After changing CRF sent to “Yes” the **Save Changes** button must be clicked for the change to persist.

Even though an invoice will not be sent, it is critical to create invoice requests for CRF expected payments. SRM needs to record the receivable on the books in order to follow up on the expected payments.

1. To edit the Per Subject Costs, click on **Edit** button. Enter any comments and mark the item billable **Yes** or **No**.

b. For an **Invoiceable Items** invoice, select the procedure from the pull down menu.

The screenshot shows the CRISP system interface with a sidebar menu on the left. The main content area displays the same invoice request table as in the first screenshot. The "Invoice Selection" modal dialog is open, showing the "Invoiceable Items" radio button selected.

Note: The procedure must be on the Fee Schedule. Enter the date, comments, and click the **Save** button when finished.

3. When selecting **Add Other Fee** or **Add Startup Fee**, a drop down menu appears, and you can select the type of fee you wish to invoice.

The screenshot shows the Stanford University CRISP interface. The left sidebar contains navigation options: Dashboard, SPO # 107699, Fee Schedule, Visits, Subjects, Trial Users, Invoice Requests (highlighted), Trial Attachments, Admin Tasks, Help, and Reports. The main content area displays 'Other Study Related Fees' and 'Study Startup Fees' sections, each with a 'None' selection and buttons for 'Add Other Fee', 'Edit', and 'Delete Checked'. A red banner at the top reads 'REQUIRED: Attach IRB Letter PRIOR to Forwarding Invoice Request'.

a. **Save** closes the drop down menu.

The screenshot shows the 'Study Fee' dropdown menu. The menu lists various procedures with checkboxes and fee dates. The 'Save' button is highlighted in red.

<input type="checkbox"/>	Procedure	Fee date
<input checked="" type="checkbox"/>	Advertising Costs [Starts: 25-SEP-2012, Amount: \$2,560.00]	25-SEP-2012
<input checked="" type="checkbox"/>	IRB protocol amendment fee [Starts: 25-SEP-2012, Amount: \$320.00]	25-SEP-2012
<input type="checkbox"/>	Investigator Study Initiation Training Time [Starts: 25-SEP-2012, Amount: \$500.00]	25-SEP-2012
<input type="checkbox"/>	Rigid Contact Lens Kit from ABB Concise [Starts: 01-MAR-2013, Amount: \$225.20]	01-MAR-2013
<input type="checkbox"/>	Screen Failure [Starts: 25-SEP-2012, Amount: \$640.00]	25-SEP-2012
<input type="checkbox"/>	Staff Study Initiation Training Time [Starts: 25-SEP-2012, Amount: \$250.00]	25-SEP-2012

1 - 6

Cancel Save

4. Add any **Attachments** for backup and/or **Comments**.

SPO #107699 Award # VACWC Project Name: Principal Investigator: Sponso

Attachments

Select File(s) No files selected.

Comment

No Attachments Found

User Comments

Comments

No Comments Found

5. Select among **Send to FS**, **Return to SC** or **Send to AR**.

Note: Only the Financial Specialist can route the invoice request to AR.

Trial Attachments

The **Trial Attachments** page allows users to upload backup documentation.

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SPO #121820 Award # VADWW Project Name: SPO 121820

Trial Attachments

Select File(s) No files selected.

1. Click the **Browse** button to locate the file on your computer that you would like to upload.
2. Double click on the file that you would like to attach.
3. Click the **Upload** button to upload the file.

If you need additional help, please submit a HelpSu ticket or call (650) 725-0086.