

Date: November 28, 2023

To: Clinical Research Faculty & Staff

From: **Ray L. Watts, M.D.**
President

Anupam Agarwal, M.D.
Senior Vice President for Medicine and Dean, Heersink School of Medicine

Christopher S. Brown, Ph.D.
Vice President for Research

Re: OnCore Financials New Requirements

We are writing to update you on our transition to OnCore for financial management of clinical trials. As you may know, use of the OnCore Financials Module is standard procedure for several clinical trial units on campus, and further training in the adoption and use of the Financials Module for all clinical trials has been underway throughout much of 2023 as additional teams are being phased in. **As of March 1, 2024, all new industry sponsored finalized clinical trial budgets will be required to be entered into OnCore and the Financials module. In addition, all subject visits for industry sponsored trials must be managed in OnCore in a timely manner.** All other OnCore processes (calendar requests, calendar builds, coverage analysis, etc.) remain unchanged. All calendars will continue to be managed through current workflows.

Advarra's OnCore Financials will streamline and optimize UAB's financial management processes. It is designed specifically to efficiently track and manage research budgets, grants, and expenditures, ensuring financial compliance and transparency. Its real-time reporting and analytics capabilities will enable our research leaders to make data-driven decisions, allocate resources effectively, and maximize funding utilization. Furthermore, OnCore Financials simplifies the billing and invoicing process, reducing administrative burden and improving revenue cycle management. By offering a comprehensive financial management solution that we have configured to our needs, we will enhance our operational efficiency support UAB's mission of advancing scientific discovery.

For details on what exactly is required, please see the attached OnCore Financials Requirements graphic. Details can also be found in the [Required Utilization of OnCore Financials Console Document](#) as well as in the [Minimum Footprint Document](#).

We look forward to working with you and your team during this important transition. Thank you!

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