

## PATIENT CARE CORRECTIONS CHECKING AND/OR REQUESTING PCC SUBMISSION ACCESS

To submit a Patient Care Correction (PCC) request, you must have access to the “Patient Care Charges” link in the fund’s Insight “Agreements” module. To check whether you have access to this link, log into Insight and click to enter “Agreements”.

The screenshot shows the Insight web application interface. At the top, there is a navigation bar with links for [Fund # Lookup](#), [Log Out](#), [Help](#), [Browser Info](#), and [Help Desk](#). Below this is a header with the Insight logo and navigation tabs for [Agreements](#), [Humans](#), [Conflict of Interest](#), and [Admin](#). A welcome message reads "Welcome to Insight, Francis Freeman".

On the left, there is a "Helpful Links" section with a list of links including "Request Access – Central", "Request Access – Departments", "Request Insight Training", "PHS Research Applications Gateway", "Insight Overview", and "Fund # Lookup". Below this is "Insight Documentation" with links for "Insight General Information", "Agreements Module", "Advance Fund Request Module", "Residual Balance Transfer Module", "Patient Care Correction Module", "PCC Missing or Misdirected Charges", "Humans Module", "eIRB Module", "Conflict of Interest Module", and "Admin Module".

The main content area is titled "The following modules are associated with your profile:". It contains three sections:
 

- Agreements**: "The agreements module provides a listing of all active and pending research funds, financial overview of data, search capability, investigator summaries, budget details, monthly expenses, revenue breakdown, expense management, financial projections, etc." Below this is a button labeled "go to Agreements".
- Humans (eIRB)**: "The humans module enables the user to prepare, submit, and track IRB submissions online. Insight/eIRB may contain information that is confidential and proprietary to the participating Hospitals and/or the study sponsor. Note: Distribution of confidential and proprietary documents beyond the Hospital research team and others within Hospital/Partners with a need to know is prohibited without prior written approval by Hospital and the third party involved." Below this is a button labeled "go to Humans".
- Admin**: "The admin module provides means to manage users outside the Partners IS, LABS, asset managers, and sponsors." Below this is a button labeled "go to Admin".

A red box highlights the "Agreements" link in the top navigation bar. A red arrow points from this box to a red box containing the text "OR". Another red arrow points from the "OR" box to a red box containing the text "go to Agreements" in the "Agreements" module description.

(NOTE: If you do not find “Agreements” on your landing page after logging in, you do not have access to “Patient Care Charges”. See section below the next screen shot.)

Upon entering “Agreements”, select the fund you need to submit the PCC for. This will bring you to the fund’s main Agreements page. Under **Financials > Expense Management** in the left-hand navigation pane, look for “Patient Care Charges”.

The screenshot shows the "AGREEMENTS" page for the "Killebrew Metabolic Anomaly Study". The left-hand navigation pane includes sections for "2015D001234", "Project Information", "Deliverables", "Summary Notes", "Financials", "Expense Management", "Financial Report", "Monthly Expense Summary", "Monthly Expense Detail", "Accounts Payable", "Journal Entries", "Revenue", "Patient Care Charges" (highlighted with a red box), and "Encumbrances".

The main content area displays the following information:
 

- Study Name:** Killebrew Metabolic Anomaly Study
- PI:** Killebrew, Emrys (EK99) | **Sponsor:** WeX Corporation | **Agreement #:** 2015D001234
- Fund #:** 123456 (Active) | **Project Period:** 01/01/15 - 12/31/18 | **Record Type:** CTO - Funded Agreement
- Last GL Post:** 02/28/18 | **Last PO/AP Post:** 03/15/18

The "Financial Report" section shows a table with the following data:

Category / Account	Budget	Expense	Current GL Balance	Encumbrance	Projected Balance
SALARIES & WAGES	\$1,000,000.00	\$2,000,000.00	(\$1,000,000.00)	\$0.00	(\$1,000,000.00)
FRINGE BENEFITS	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
PATIENT CARE	\$0.00	\$15,150.00	(\$15,150.00)	\$0.00	(\$15,150.00)
OTHER EXPENSES	\$0.00	\$500,000.00	(\$500,000.00)	\$0.00	(\$500,000.00)
<b>Total Direct Costs</b>	<b>\$1,000,000.00</b>	<b>\$2,515,150.00</b>	<b>(\$1,515,000.00)</b>	<b>\$0.00</b>	<b>(\$1,515,000.00)</b>
<b>Total Costs</b>	<b>\$1,000,000.00</b>	<b>\$2,515,150.00</b>	<b>(\$1,515,000.00)</b>	<b>\$0.00</b>	<b>(\$1,515,000.00)</b>
TOTAL REVENUE		\$5,000,000.00		\$0.00	
<b>Prior Year Balance</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>

If you find “Patient Care Charges” listed among the links under “Expense Management”, this is where you will initiate the Patient Care Correction. Follow the appropriate PCC tip sheet for the type of correction request you need to submit. \*

If you **do not** find “Patient Care Charges” listed among the links under “Expense Management” (or you do not have access to the “Agreements” module at all), you do not have the necessary access to submit the PCC request. If this is the case, there are two options:

- 1) You may request necessary access with the PI’s authorization
- 2) The corrections can be submitted by a member of the study team who does have access