

## HELPFUL HINTS

### DATE SHORTCUTS

t = today  
w = week  
m = month  
y = year

- **t**: Inserts the current date
- **t + n** (where n is a number): Inserts a date 'n' days forward from today
- **t - n** (where n is a number): Inserts a date 'n' days before today
- **w + n / w - n**: Inserts the current date plus / minus 'n' number of weeks
- **m + n / m - n**: Inserts the current date plus / minus 'n' number of months
- **y + n / y - n**: Inserts the current date plus / minus 'n' number of years
- **mb or me**: Inserts the beginning or end of the month respectively; It may be used alone, or with the +/- 'n' option.
- **yb or ye**: Inserts the beginning or end of the year, respectively; It may be used alone, or with the +/- 'n' option.

### 'SAVE PREFERENCES' AVAILABLE

On different screens within OnCore, there is a link to 'Save Preferences'. On these screens, simply select your preferences and click the 'Save Preferences' link. This will be your default settings for that specific screen in the future.

Example: CRA Console / Accrual Tab

The screenshot displays the 'CRA Console' interface for the 'MCC-TRAIN-IT' protocol. The main area shows an 'Accrual Details' table with columns for Study Site, Subject MRN, Last Name, First Name, Sec No., Arm, Level, Status, Status Date, Yr, Last Visit, and Last Vis. The table lists several subjects from Markey Cancer Center and Owensboro Health Mitchell Memorial Cancer Center. A dropdown menu is open on the right side of the table, showing options: All, Accrued, New, Eligible, Ineligible, and All. At the bottom right of the interface, there is a 'Save Preferences' button highlighted with a red box.

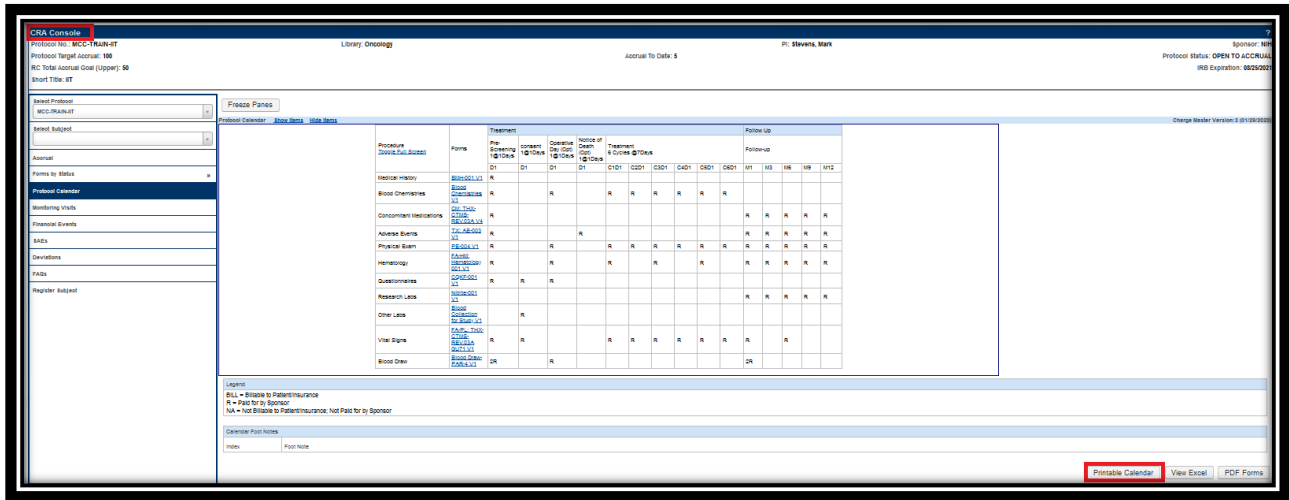
Study Site	Subject MRN	Last Name	First Name	Sec No.	Arm	Level	Status	Status Date	Yr	Last Visit	Last Vis
Markey Cancer Center	11477RR	Cat	Smelly		Arm 1		ON TREATMENT	06/02/2020	2	D1	06/01/2020
Markey Cancer Center	88887	Lay	Frito				ELIGIBLE	07/02/2020	2		
Markey Cancer Center	66855RR	Lector	Hannibal				CONSENTED	05/27/2020	2		
Markey Cancer Center	12345	Man	Super		Arm 1		ON TREATMENT	08/25/2020	2	C3D1	09/09/2020
Markey Cancer Center	33355	Man	Spider		Arm 1		ON TREATMENT	06/01/2020	2	C4D1	07/20/2020
Markey Cancer Center	22225	man	bat		Arm 1		ON TREATMENT	08/26/2020	2	C3D1	09/08/2020
Owensboro Health Mitchell Memorial Cancer Center	11444	smith	joe						2		
Owensboro Health Mitchell Memorial Cancer Center	88889	woman	cat	001	Arm 1		ON TREATMENT	06/01/2020	2	C6D1	07/06/2020

### 'FREEZE PANES' AVAILABLE FOR CALENDARS



## HELPFUL HINTS

The CRA Console has a **Printable Calendar** button which would show details for all Subjects enrolled on the Protocol.



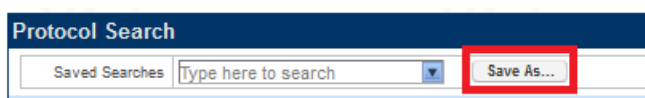
## PROTOCOL AND SUBJECT SEARCHES CAN BE SAVED FOR REPEATED USE

*This ability is permission driven and may not be available to all Users.*

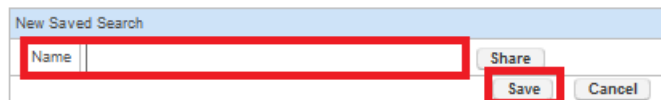
After selecting specific filter criteria within the Protocol and Subject Search, the Search itself can be saved and assigned a name to use at a later time.

To do this, design your search to capture the data desired.

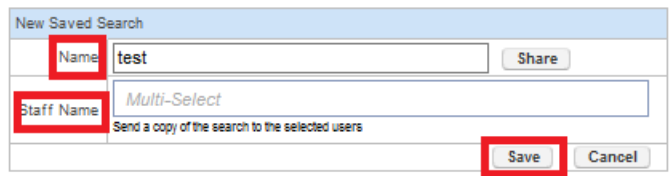
Select the **Save As** button at the Top Left of the Search screen.



Name the Search and click the **Save** button.



There is also a **Share** button available to share a Saved search with another OnCore User. To use this functionality, click the **Share** button, enter the Search Name, and Staff Name of the OnCore User to share the search with, and click the **Save** button.

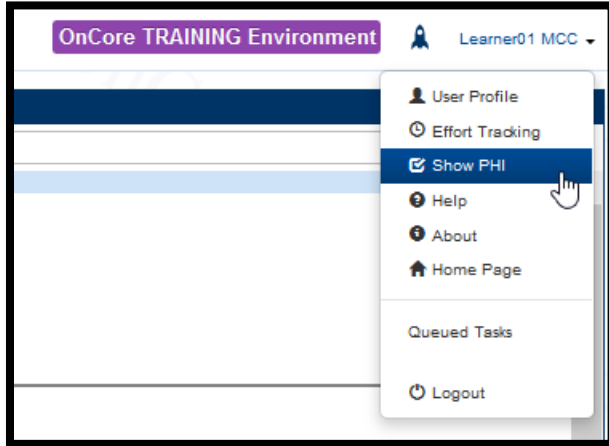


## HELPFUL HINTS

### PHI CAN BE TURNED OFF AND ON

*The ability to see PHI is permission driven and may not be available to all Users.*

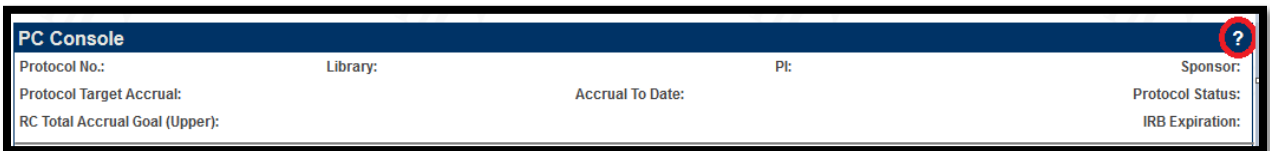
There is a  Show PHI link under the User profile that must be checked to permit PHI to be viewed. If PHI is missing, check this location to see if you are able to turn on the PHI.



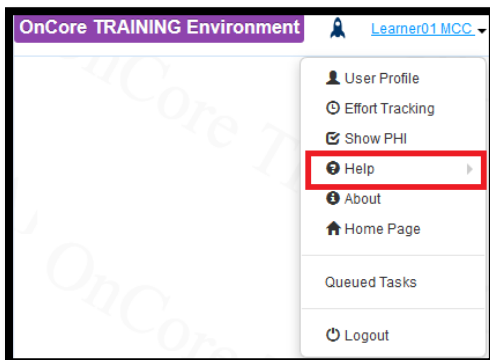
### HELP FUNCTIONS WITHIN ONCORE

There are a couple of options within OnCore to find additional information or resources.

- Each Screen within OnCore has a “?” symbol in the Top Left corner of the screen. Clicking this will take you to a website to provide additional information about that screen or Console.



- There is a HELP selection under the User Profile. This provides links to many HELP resources. (Onsemble Learning Portal, Onsemble.net, internal UK websites).



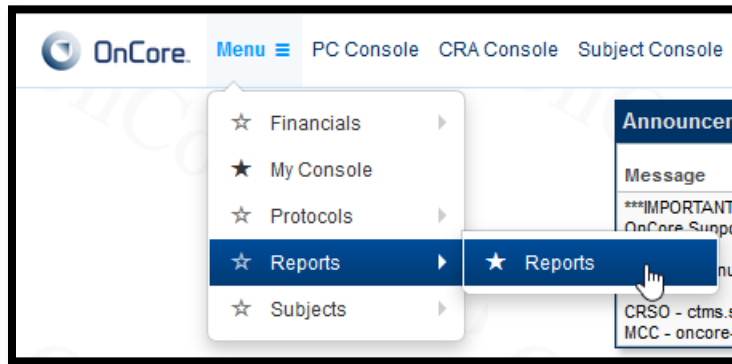
## HELPFUL HINTS

### TWO SHORTCUTS TO CHECK-IN SUBJECT VISITS

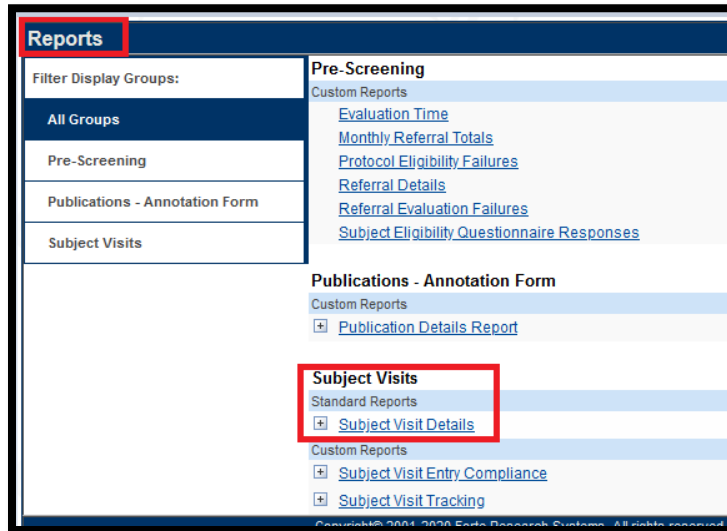
There are two (2) easy ways to check in Subject Visits without going through the Subject Console / Calendar tab. *Additional information can be found in the associated Training Manual or Video.*

#### 1. Subject Visit Details Report – available to Users who enter Subject Data

- Found under Menu / Reports / Reports



- Found in Reports under Subject Visits



- Can create a customized Report for identifying Subject Visits which require input from a specified User. Can be filtered by Protocol number if desired, or solely by User name.
  - **Example:** Find all Subject Visits which still require a Visit to be checked-in for the past month by the User “Learner01”:

## HELPFUL HINTS

The screenshot shows the 'Subject Visit Details' form with the following search criteria highlighted in red:

- Visit Date From: 09/28/2020
- Visit Date Thru: 10/28/2020
- Subject Staff (Last, First): MCC, Learner01
- Visit Status: Planned

Buttons for 'Submit', 'Clear', and 'Back' are visible at the bottom. Copyright notice: Copyright© 2001-2020 Forte Research Systems. All rights reserved.

Results would appear in Report form of all Protocols and Subjects that are assigned to the specified User (Learner01 in this case), and any Visits which have not been entered. If the Visit has indeed occurred, this will provide a Link to the associated Subject Visit Update Screen via the 'Visit Info' Link, or the 'Subject Calendar' View Link to enter the Visit Data directly.

The screenshot shows the 'Subject Visits Results' table with the following search criteria:

- Subject Visit Date From: 09/28/2020
- Subject Visit Date Thru: 10/28/2020
- Subject Staff Name: MCC, Learner01
- Visit Status: Planned

Legend:

- (A) - Additional procedure
- (M) - Missed procedure
- (NA) - N/A procedure

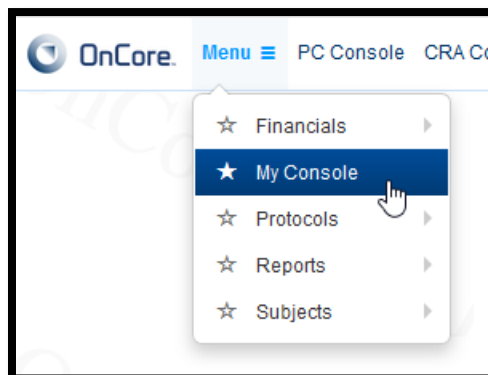
Total Visits Found: 2

Protocol No.	Subject MRN	Subj Name	Sex	Subj Info	Visit Info	Visit Status	Earliest Visit Date	Latest Visit Date	Procedures	Footnotes	Forms	Subject Staff	Subject Calendar
MCC-TRAIN-IT	12345	Man, Super		SM	10/06/2020 (Treatment, CSD1)	Planned	10/03/2020	10/09/2020	Blood Chemistries; Physical Exam; Vital Signs		Blood Chemistries V1; PE-004 V1; FA-PL, THX-CTMS-REV.03A GU71 V1	ENC - MCC, Learner01; TP - Stevens, Mark; ENP - Stevens, Mark	<a href="#">View</a>
MCC-TRAIN-IT	22225	man, bat		BM	09/20/2020 (Treatment, CSD1)	Planned	09/27/2020	10/03/2020	Blood Chemistries; Physical Exam; Vital Signs		Blood Chemistries V1; PE-004 V1; FA-PL, THX-CTMS-REV.03A GU71 V1	ENP - Stevens, Mark; ENC - MCC, Learner01; TP - Stevens, Mark	<a href="#">View</a>

Buttons for 'View Excel' and 'Back' are visible at the bottom right.

## 2. My Console – also available to Users who enter Subject Data

- Found Under Menu / My Console



## HELPFUL HINTS

- Provides a list of Protocols, Subjects, Subject Visits, and 'My Calendar' assigned to a specific User (whoever is logged into OnCore)

My Console		
Protocols	Protocols	
Subjects	Protocol No.	Title
Subject Visits	11-GYN-098-MCC	11-GYN-098-MCC: A Non-randomized Neoadjuvant Platinum-based Chemotherapy in Advanced Ovarian, Fallopian Tube, and Primary Peritoneal Carcinoma Trial Protocol
My Calendar	MCC-SCANARM	Training protocol for using a separate calendar arm for scans
	MCC-SCANMULTI	Training protocol for selecting a scan at a scheduled visit
	MCC-SUMMACC	Training protocol to demonstrate Summary Accrual process
	MCC-TRAIN	Training protocol for IND/NAT1 protocols
	MCC-TRAIN-2	Training protocol for OBS trials
	MCC-TRAIN-IIT	Training protocol for an IIT
		Status
		CLOSED TO ACCRUAL
		OPEN TO ACCRUAL
		OPEN TO ACCRUAL
		OPEN TO ACCRUAL
		OPEN TO ACCRUAL
		OPEN TO ACCRUAL

- Each Tab would provide direct links to the Protocols in PC Console, Subjects in Subject Console, Subject Visits (both Occurred and Pending) on the Subject Calendar. The 'My Calendar' tab would show all the information above in Calendar form with direct links to the Protocol, Subject, and Subject Visit.
- The calendar can be viewed by Day/Week/or Month.

My Console							
Protocols	October 2020						
Subjects	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Subject Visits	27	28 • Taco Tuesday MCC-SCANMULTI C8D1	29 • Super Man MCC-TRAIN-IIT C8D1 Tolerance: +/-3	30 • bat man MCC-TRAIN-IIT C8D1 Tolerance: +/-3	1	2	3
My Calendar	4	5	6 • Super Man MCC-TRAIN-IIT C8D1 Tolerance: +/-3	7	8	9	10
	11	12	13	14 • Silly Rabbit MCC-SCANARM C8D1 Tolerance: +/-3	15	16	17
	18	19	20	21	22	23	24
	25 • Taco Tuesday MCC-SCANMULTI Scan Visit	26 • Taco Tuesday MCC-SCANMULTI C7D1	27	28	29	30	31

Include Subjects From Assigned Protocols  
 Include Assigned Subjects