Pre-Screening Console

OnCore supplies a way to track screening efforts for potential Subjects.

1. Select the Subjects → Pre-Screening menulink.

   Your initial page is a search screen. We will return to this shortly.

2. Click the **New** button to create a new pre-screening record.

   The top portion of the screen is where you can record Referral and Contact Information. The fields are straightforward, and only the Contact Date is required.

3. Select a **Management Group**.

4. Enter today's date as the **Contact Date**.

5. In the **Referral Channel** field, select **Newspaper**.

   A new entry field will appear, allowing you to supply which Newspaper was used.

6. Select an item from **Referral Details**.

The next section records Subject Characteristics. All data entry fields are optional.

7. Enter a **Subject Identifier** and select one or more **Race** checkboxes.

8. Click the **Submit** button.

Once the potential subject has been evaluated, evaluation data can be entered in the bottom portion of the screen.

9. Select **Yes** for **Subject Evaluated?**

10. Select yourself as the **Evaluator** and record a **Time Spent.**

11. Select our training protocol number in the **Protocol No.** field.

12. Select **Yes** for **Subject Consented?**, then click elsewhere in the screen.

    When a Protocol No is entered and the patient is listed as having consented, the **Add Subject to Protocol** button appears.

13. Click the **Add Subject to Protocol** button.

    You are transferred to the New Subject Registration screen. On this page you can add a new subject to the protocol.

14. Return to the Pre-Screening Search page via the Subjects→ Pre-Screening menulink.

Now that you've seen the Pre-Screening entry page, the initial search page makes sense. It's a typical search page.

Here you may enter or select data in the various fields to narrow your search. Let's see the pre-screening record you just entered.

Start typing your last name in the **Evaluated By** field, your name will display in the drop-down. Click on your name and then click the **Submit** button.

The Search Results screen displays the search criteria in the header, and the found records in a table below. The column headers in the table are hyperlinks – click them to sort the records by that column.

15. Click on the Pre-screening ID hyperlink. This will display the Pre-Screening Record. Click the **Update** button.

Additional fields allow you to indicate who did the evaluation and the time it took, if the patient is eligible. Once the patient goes On Study, the **Patient On Study** and **Record Completed** fields may be set to Yes. You may enter additional information in the **Subject Notes** section that will appear at the bottom of the page.

16. Click **Submit** to save the information, then click **Close**.