My Console

My Console is designed to assist subject staff in managing subject visits. It provides a means to view and verify visits without having to access each subject individually from the **CRA Console** and **Subject Console**.

My Console provides a *personalized* view of OnCore data, displaying information that is relevant to the current OnCore user.

1. Open My Console by selecting the **My Console** → **My Console** menu item.

   The My Console page has four vertical tabs. The **Protocol** tab displays all protocols to which you have been assigned as part of the **Protocol Staff**, regardless of Role. (Protocol Staff are defined on the PC Console → Main → Management tab.) A protocol must have an **Active** status of **Open to Accrual**, **Closed to Accrual**, or **Suspended** to appear in My Console. Protocols that have been **Terminated** or had an **IRB Study Closure** will not be displayed.

   Each protocol displayed has a hyperlink for its protocol number. Clicking the hyperlink will launch the PC Console.

2. Click the **Subjects** tab.

   The **Subjects** tab displays all subjects to which the user has been assigned as part of the **Subject Staff**. (Subject Staff are defined on the Subject Console → On Study tab.)

   Initially, active subjects on active protocols are shown, but this can be changed using the filter controls in the header band. Unchecking the 'Show Active Protocols Only' checkbox will cause subjects from all protocols to show. Selecting a different Subject Status from the dropdown will cause subjects of different statuses to show. The available choices map to these Subject Statuses:

   - **Active**: Consented, Eligible, Eligible(O), On Study, On Treatment, Consent Waived
   - **On Follow Up**: Off Treatment, On Follow Up

   Subjects are shown in a table with hyperlinked column headers. Clicking a column hyperlink will sort the table based upon data in that column.

   Each subject displayed has a hyperlink for its Subject MRN. Clicking the hyperlink will launch the Subject Console.

3. Click the **Subject Visits** tab.

   The **Subject Visits** tab contains two horizontal tabs to view **Occurred Visits** and **Pending Visits** for your subjects. This tab is the most functional, as it provides a way for you to quickly update information regarding subject visits without the having to locate each subject visit individually.

   On the **Occurred Visits** tab, you may quickly note if the forms for each visit were completed, submitted and monitored on any given day. (These columns correspond to the visit's **Data Collection Completed Date**, **Submitted Date**, and **Monitored Date** fields from the **Subject Visit Update** page.)

The list is useful for keeping track of your eCRF load for externally sponsored trials where you need to complete case report forms and send them to the sponsor or have the sponsor come to monitor them.

You may update the dates for these visits by selecting each checkbox that applies, completing the date field at the bottom of the column, and clicking the **Submit** button. When the **CRF Completed** date is filled in and *either* the **CRF Submitted** date or the **CRF Monitored** date is also filled in, the visit will no longer show in the list because you are finished with its work.

4. Click the **Pending Visits** horizontal tab.

On the Pending Visits tab, you can view all non-occurred visits within a given timeframe. The **From Date** defaults to a week prior to the current day and the **Thru Date** default to a week after the current day. This quickly gives you a view of any recent visits that you still need to verify, and some upcoming visits you may need to plan for.

Subject visits may also be filtered by a particular protocol or a particular subject by selecting values in the **Protocol Filter** and **Subject Filter** Find-As-You-Type fields. (If a protocol is selected in the Protocol Filter, the Subject Filter will only supply subjects assigned to the selected protocol.)

5. Enter a **From Date** of **05/01/2011** and click the **Refresh** button.

Each Pending Visit has a hyperlink in the Visit column. Clicking this hyperlink takes you to the **Subject Visit Update** page, where you may enter details about the visit. The **Planned Visit Date** is the Visit Date in the subject's calendar. If you don't have extra details to record for a visit, you may mark it as **Occurred** by completing the **Actual Visit Date** field and clicking the **Submit** button. You may mark a visit as **Missed** by checking its checkbox and clicking the **Submit** button. Multiple visits may be verified simultaneously in this way. Future visits cannot be marked as Missed.

The **Clinical Comments** field is a read-only field displaying the Clinical Comments from the **Subject Visit Update** page.

6. Click the **My Calendar** tab.

The **My Calendar** tab displays your subject visits in a month format calendar. Initially it shows visits for subjects you are assigned to as **Subject Staff** and visits for subjects on protocols you're assigned to as **Protocol Staff**. There are checkboxes at the bottom of the calendar that can be used to change these visit filters.

You may change the calendar view by using the icons below the month title at the top. The view can be changed to a single day, one week, or one month. You can click on the month and year titles at the top of the calendar to quickly select another month and year, or navigate one day, week, or month at a time using the dates to the right and left in the header area.

On the calendar, the **subject name**, **protocol number**, and **visit description** are hyperlinks that will jump you to the **Subject Console**, **PC Console**, and **Subject Visit Update** page, respectively.

Team Console

The **Team Console** is a progress reporting and protocol management tool used by a management team. A staff member with a Management Group in their staff record will see data for all protocols assigned to the Management Group.

Team Console provides a *personalized* view of OnCore data, displaying information that is relevant to the current OnCore user.

1. Open the Team Console by selecting the **Reviews** → **Team Console** menu item.

   When you pull up the **Team Console**, a **Management Group** dropdown is displayed at the bottom of the left column. All of your Management Groups are available. (Your Management Groups are defined in your Staff page.) Choosing a different group updates the display. Data displayed by the Team Console is relevant to the currently selected Management Group.

   (If your account does not have at least one Management Group, you do not have the capability to use the console as it is meant to be used.)

   The **Pending Protocols** tab displays the selected Management Group's protocols that have yet to be Opened to Accrual. You can see where each protocol is in the approval process and can check basic information about the protocol such as number and title, the principal investigator, and see the committee approvals, signoffs, and checklist items.

   The **Protocol No** displays as a hyperlink. Selecting the hyperlink transfers you to the **PC Console**. Each protocol also displays a **Checklists** hyperlink, which transfers you to the **Protocol Checklists** page.

2. Click the **Open Protocols** tab.

   The **Open Protocols** tab displays the selected Management Group's protocols that are open to accrual. The open date, summary accrual information, and accrual information for the last four months are shown.

The five other tabs require the **Last Meeting Date** to be entered.

3. Enter **01/01/2003** in the **Last Meeting Date** field.
4. Click the **Closed Protocols** tab.

   The **Closed Protocols** tab displays the selected Management Group's protocols that have been Closed to Accrual since the Last Meeting Date.

5. Click the **SAEs** tab.

   The **SAEs** tab displays the selected Management Group's SAEs that have had an Event Date or Reported Date since the Last Meeting Date. SAE information is displayed, and an SAE hyperlink is supplied for quick access to the SAE page.

6. Click the **Deviations** tab.

   The **Deviations** tab displays the selected Management Group's Deviations that have a Reported Date or Deviation Date since the Last Meeting Date. The protocol and deviation can be viewed quickly with the hyperlinks provided.

7. Click the **OSRs** tab.

   The **OSRs** tab displays the selected Management Group's Outside Safety Reports that have an Issued Date or Received Date since the Last Meeting Date. It shows information about the OSR and has a hyperlink to jump to the protocol.

8. Click the **Summary** tab.

   The **Summary** tab shows overall counts of protocols in various statuses along with counts of deviations, OSRs, SAEs and registrations for the selected Management Group.