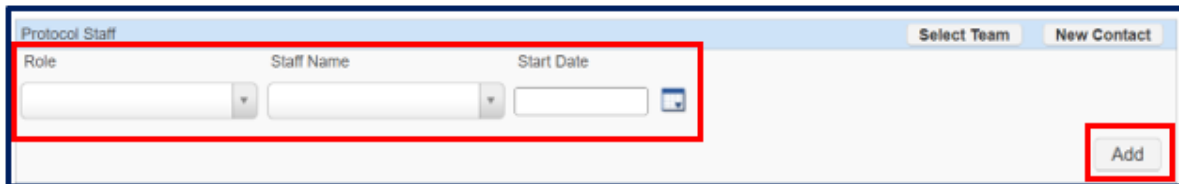


ASSIGN STUDY STAFF IN ONCORE

Description: UF study teams MUST keep OnCore study staff data current. This is even more important for OnCore studies that are also in Epic; **Study Coordinators, Epic Charge Reviewers, Data Managers, and Principal Investigators** must be the same in OnCore and Epic.

ASSIGN STAFF INDIVIDUALLY

1. Navigate to **Menu > Protocols > PC Console**.
2. In the **Select Protocol** field, type in the study protocol number (or other [study identifier](#)).
3. Click the **Staff** horizontal tab.
4. Click **[Update]**.



5. In the **Staff Name** search box, begin typing the staff member's name.
6. Select the staff member from the results.



*If you are trying to add a staff member and their name does not appear in the **Staff Name** drop-down menu, please complete an "Add/Update Staff" request via the OnCore Support webpage <https://clinicalresearch.ctsi.ufl.edu/oncore/oncore-support/add-update-staff/>*

7. Select a role from the **Role** drop-down menu.
8. Recommended: Add a **Start Date** for this staff member (for details, see **Add Staff Start Dates** section below).
9. Click **[Add]**.
10. Repeat the above steps until all protocol staff members have been added.



Make sure you have at least one person assigned to each of the following REQUIRED staff roles:

- **Authorized Prescriber** - Required for studies that involve investigational drugs dispensed by the UF Health Investigational Drug Service (IDS)
- **Billing Coordinator** - responsible for paying patient care costs invoices (e.g. from Epic)
- **Epic Charge Reviewer** - Only required for studies that are/will be in Epic
- **Financial Coordinator** - negotiates the budget, and/or performs coverage analysis on the billing grid, and/or, is responsible for invoicing sponsor
- **IRB Coordinator** - responsible for IRB submissions and consents
- **Primary Study Coordinator**
- **Principal Investigator**
- **Study Site Contact** - to be listed as study contact on the Study Information Portal

NOTE: You may also see additional roles used by OCR staff for internal task list notifications. These staff roles begin with "OCR". **DO NOT DELETE/EDIT/CHANGE THESE ROLES.**

NOTE: After an OnCore study is active and uploaded to Epic, changes to study contact data in OnCore will not update in Epic until the next business day.

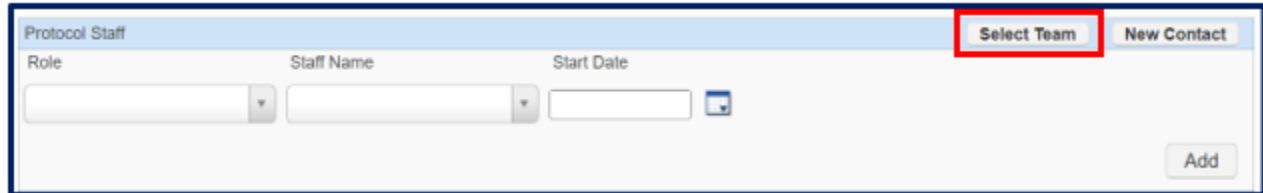


If you need any staff updated in Epic sooner, please email OnCore-Support@ahc.ufl.edu and ask them to refresh the Epic staff list.

ASSIGN ADDITIONAL STAFF FROM ANOTHER STUDY

If staff members often work together on protocols, you can save time when assigning staff by copying staff assignments from another study.

1. Navigate to **Menu > Protocols > PC Console**.
2. In the **Select Protocol** field, type in the study protocol number (or other [study identifier](#)).
3. Click the **Staff** horizontal tab.
4. Click **[Update]**.



The screenshot shows the 'Protocol Staff' interface. At the top right, there are two buttons: 'Select Team' and 'New Contact'. The 'Select Team' button is highlighted with a red rectangular box. Below the buttons, there are three input fields: 'Role', 'Staff Name', and 'Start Date'. The 'Role' and 'Staff Name' fields are dropdown menus, and the 'Start Date' field is a text input with a calendar icon. An 'Add' button is located at the bottom right of the form.

5. Click **Select Team** (upper right hand side of page).
6. In the pop-up, type the protocol number from which you want to copy staff.
7. Click **[Show Team]**.
8. Click on the **Select** check boxes next to any staff members you want to copy.
9. Click **[Submit]** to save the Staff details.



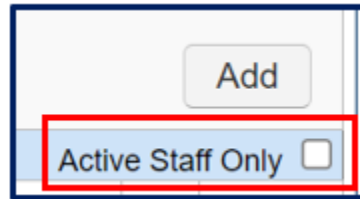
After an OnCore study is active and uploaded to Epic, changes to study contact data in OnCore will not update in Epic until the next business day.

If you need any staff updated in Epic sooner, please email OnCore-Support@ahc.ufl.edu and ask them to refresh the Epic staff list.

ADD STAFF START AND STOP DATES

While not required, it is a good idea to add **Start** and **Stop Dates** for staff members. Using these dates can help filter out “Active Staff” in reports and displays, while maintaining historical information on which staff members have worked on the study.

1. Navigate to **Protocols > PC Console**.
2. In the **Select Protocol** field, type in the study protocol number (or other OnCore identifier).
3. Click the **Staff** horizontal tab. Click **[Update]** button if needed.
4. Display **Start** and **End Dates** by ensuring that the **Active Staff Only** check box in upper right corner is off.



5. For any staff member missing a **Start Date** or **End Date**, click on the tiny [Edit](#) hyperlink next to that staff member’s name.
6. Add a Start or End Date in the designated field. Note: Each study team can determine what date will be used as a Start date for staff (e.g. the date that the staff member was assigned to this protocol).
7. For End Dates, you can enter a reason (e.g. “Retired”).
8. **Note:** Do NOT click the **Delete** button to inactivate someone from a study; if you do, you will lose their history. The **Delete** button should only be used when you have entered a staff record by accident.
9. Click the **[Submit]** button on the pop-up.
10. Repeat for the other Staff members missing a Start or End Date (as needed).
11. Click the **Active Staff Only** check box. All inactive staff members will no longer be displayed.

ADD A STAFF MEMBER TO MULTIPLE STUDIES AT ONCE

Use the OnCore [Protocol Search](#) functionality to add a staff member to multiple protocols at once. See the [Protocol Search](#) user guide.



After an OnCore study is active and uploaded to Epic, changes to study contact data in OnCore will not update in Epic until the next business day.

If you need any staff updated in Epic sooner, please email OnCore-Support@ahc.ufl.edu and ask them to refresh the Epic staff list.

INACTIVATE A STAFF MEMBER FROM MULTIPLE STUDIES AT ONCE

The OnCore support team can inactivate a staff member from a large number of studies at once - for example, when a study coordinator retires and you want to re-assign all their studies to a new coordinator. To get help with this, contact the OnCore Support team via OnCore-Support@ahc.ufl.edu or submit a [support help desk ticket](#).

ONCORE & EPIC: KEEP STUDY COORDINATORS AND CHARGE REVIEWERS UPDATED

When a new Study Administrative Record is first created in Epic, the names in the following Study Staff Roles are added to the Epic record using the OnCore-Epic interface:

<u>OnCore Study Staff Role</u>	<u>Epic Study Administrative Record Field</u>
Primary Study Coordinator(s)	Study Coordinators
Secondary Study Coordinator(s)	Study Coordinators
Epic Charge Reviewer(s)	Study Coordinators
Data Manager(s)	Study Coordinators
Principal Investigator	Principal Investigator

- Staff assigned to one of the roles listed above **MUST** have an active Epic User Account if the study meets the Epic Upload Criteria.
- After an OnCore study is active and uploaded to Epic, **study teams** are responsible for signing into **OnCore** to verify, maintain, and update the list of Study Coordinators and Charge Reviewers.
- **Principal Investigator** changes must be submitted to the [OCR office](#).
- If updates are needed to the **Epic email addresses for receiving Epic Research Study Statements**, study teams must [submit a UF Health IT service request](#).



*Changes to study contact data in OnCore will not update in Epic **until the next business day**.*

If you need any staff updated in Epic sooner, please email OnCore-Support@ahc.ufl.edu and ask them to refresh the Epic staff list.

[CLICK HERE TO WATCH A DEMO VIDEO](#)