

**Description:** Before obtaining UF OnCore access, new UF OnCore users must take some required training and become familiar with some basic access concepts and terminology.

**Audience:** New UF OnCore Users

## UF OnCore Access - Basics

### ONCORE STAFF: CONTACTS vs. USERS

- **OnCore Contacts** are individuals/staff who **\*DO NOT HAVE ACCESS\*** to OnCore but can be associated with protocols and subjects in OnCore.
- **OnCore Users** can login to OnCore and view/update OnCore records in accordance with their given roles and permissions.
- When the OnCore Support team sets up a user account, they first create an **OnCore Contact** record, and then activate it as an **OnCore User**. This means that all **Users** are also **Contacts**.
- Requests to add/update OnCore contacts and users are submitted via the [Add/Update OnCore Staff](#) webpage

### ONCORE USER ACCOUNTS

- Before you request an OnCore User account, the new user must first complete the online [IRB803: IRB Training \(with HIPAA\)](#) course PLUS the [OCR810: Introduction to OnCore](#) course.
- Once you have completed OCR810, you may now request access by doing the following:
  1. Fill out the [OnCore Access Request Form](#)
  2. Obtain the **authorization signature** from your Manager/Supervisor
  3. Submit the signed request form via the [Add/Update OnCore Staff](#) webpage.

### BROWSER TIPS

- OnCore supports most conventional **web browsers** (e.g. Chrome, Safari, Internet Explorer and Firefox). See the [Browser Tips](#) user guide for details.
- OnCore uses many **pop-up windows** that allow you to make selections and enter data. You must set your browser to allow pop-ups in order to use OnCore. See the [Disable Pop-Up Blockers](#) user guide for details.

### ONCORE LOGIN

- The **OnCore application** can be accessed at the following URL: <https://ufl-oncore-prod.advarra.app/>.
- OnCore uses **GatorLink authentication**, which means that once you get your OnCore account, **you will use your GatorLink credentials** to login to the system.
- Repeated unsuccessful login attempts will result in suspension of your OnCore account. If this happens, contact [OnCore-Support@ahc.ufl.edu](mailto:OnCore-Support@ahc.ufl.edu) for assistance and your account will be reactivated.
- **Forgotten or expired password issues** are managed in the myUFL system (**NOT** in OnCore) and usually can be resolved quickly by calling the UF IT Help Desk (352) 392-4357.
- After logging into OnCore, the system begins a 30 minute login session. After 30 minutes, the system will ask you to select "Continue" to renew your session for another 30 minutes. This cycle will repeat every 30 minutes.

## UF OnCore Access - Terminology and Concepts

### ACCESS COMPONENTS

The user access assigned to you is defined by a combination of three components:

- **Areas** of OnCore that you can get to - e.g. a console, a specific tab/page, or occasionally just one field
- **Actions** you can take - e.g. view, add, edit, or delete information on a page
- **Records** you can access - e.g. specific protocols, subjects, organizations, contacts, audits, registries, etc.

### STAFF ROLE vs. USER ROLE

- A contact can be assigned to specific protocols and/or subjects to document their **Staff Role** for that protocol or subject e.g. Principal Investigator, Primary Study Coordinator, IRB Coordinator, etc.
- A contact can have **multiple staff roles** for a given protocol or subject.
- Staff roles also determine who gets OnCore-generated notifications or assigned tasks in an OnCore Task List.
- Staff roles are typically assigned by study team members who have been granted "edit" access to the Study Staff tabs and pages in OnCore. See the [Assign Study Staff](#) user guide for more detail.
- A **User Role** is part of what makes up the OnCore user access granted by the OnCore Support team. Also, see the **User Roles vs. Permissions** section below.

### USER ROLES vs. PERMISSIONS

- A **User Role** in OnCore defines what **areas** you can access. The OnCore Support Team can also use roles to limit a users' access to appropriate protocols and subjects. A user can be assigned multiple roles. Examples of user roles at UF are:
  - Financial Coordinator
  - Study Coordinator
  - Study Team Manager
- **Permissions** control the **actions** that you can take within the areas and records accessed by your role(s).

### PROTOCOL ACCESS vs. MANAGEMENT GROUP ACCESS

- In addition to roles and permissions, users are granted access by **Protocol** or by **Management Group**.
- **Protocol** access means that you may only access protocols on which you are listed as study staff.
- **Management Group** access means that you can access all protocols in your designated Management Group. See the [Management Groups](#) section below.

### LIBRARIES

A **Library** in OnCore determines the OnCore Fields, Reference Lists, Forms, Protocol Annotations, Notifications, and Sign-offs available for a given protocol. UF has two Libraries in OnCore:

- Academic Health Center
- Oncology

## ORGANIZATIONAL UNITS

**Organizational Units** (also known as OUs) represent the *broadest* divisions, business units, or distinct reporting entities at an institution. UF has two Organizational Units in OnCore:

- Academic Health Center
- Cancer Center



*The **Organizational Unit** for a protocol of should always align with the **Library** for that protocol:*

***Academic Health Center – Academic Health Center***

***Cancer Center – Oncology***

*Mismatches must be corrected by the OnCore Support team.*

## MANAGEMENT GROUPS

- OnCore **Management Groups** represent smaller teams, specialties, or functional areas within an Organizational Unit.
- A management group often represents a particular treatment specialty, like cardiology or endocrinology.
- Management groups belong to exactly one OU.
- After a protocol is associated with an OU, it can be associated with one or more management groups within the selected OU.
- Every protocol should have a **Primary** management group indicated (even if there is just one management group). In standard OnCore reports, accrual will count for the **Primary** management group.

## DEPARTMENTS

- OnCore **Departments** are independent of OUs and management groups. A department might be associated with several protocols across multiple OUs.
- A department usually identifies a financial reporting area.
- At UF, most departments in OnCore align with departments as defined in the university's college structure.
- Every protocol in OnCore is associated with one department (typically the Principal Investigator's "home" department).

## ORGANIZATIONS AND STUDY SITES

- The logical groupings within an organization (organizational unit, management groups, and departments) are also used to categorize and identify contacts in OnCore and grant appropriate access.
- Access to protocols and subjects in OnCore is always limited by the organizations and/or study sites listed in the **Organization Access** field in a user's contact record.

## ACCESS TO SUBJECT DATA

Two special permissions control access to subject data throughout OnCore:

- **Subject Identification** - This permission allows users to see subjects' full names, MRNs, and Social Security numbers.
- **Subject Initials** - This permission allows users to see subjects' initials instead of full names and asterisks (\*\*\*) instead of MRNs and Social Security numbers.