Description: Pre-Screening is generally defined as screening activities that occur PRIOR to obtaining consent. These activities include review of inpatient/outpatient lists, review of patient medical records, and preliminary discussions with potential study participants.

The OnCore Pre-Screening console allows study teams to track information and time spent pre-screening participants. The information collected includes subject referral data, subject characteristic data, and protocol evaluation specifics. By collecting this information, study teams will be able to gauge the effectiveness of various referral channels as well as track pre-screening failures in more detail.

Study teams/management groups may choose to use this OnCore functionality for the following reasons:

- It provides a centralized place to keep information about pre-screening activity.
- OnCore Protocol Pre-Screening reports can be used to gain insights into recruitment trends.
- It can help study teams better understand the time and effort that is being utilized in pre-screening activities.
- Pre-Screening can be used as a springboard to the OnCore subject registration page, where it is possible to link pre-screen records to subject enrollment records in the protocol.

Audience: Study team members who are responsible for screening potential study subjects

CREATE A NEW PRE-SCREENING RECORD

Note: If there is any possibility that the patient has already been pre-screened for this protocol, we recommend that you confirm that a Pre-Screening record does not already exist for this patient/protocol combination (see next section).

1. Navigate to Menu > Subjects > Pre-Screening.
2. Click [New] at bottom right. A New Pre-Screening form will open:
3. Enter the fields required by your management group. We recommend that you consider using all the fields:
   - **Management Group** <Choose from drop-down list>
   - **Contact Date** <This field is required by OnCore - Enter Contact Date as defined by your management group>
   - **Referral Channel** <Choose from drop-down list>
   - **Referring Physician** <Choose the treating MD from drop-down list, if available>
   - **Subject Identifier** <This field allows any alphanumeric string - We STRONGLY recommend using the UF Health Epic MRN>
   - **Disease Site*** <This field is Oncology-specific>
   - **Diagnosis Group*** <This drop-down field is currently Oncology-specific>
   - Race
   - Ethnicity
   - Subject Evaluated
   - Evaluator <Your name>
   - **Time Spent** <Amount of time spent evaluating this patient for study>
   - **Protocol Number** <Enter the OnCore protocol number OCR####; This is a “find as you type” field>
   - **Subject Consented** <If “Yes”, a [Register Subject] button appears - complete the rest of the form before using>
   - Subject Eligible
   - Subject On Study
   - Record Completed

4. If using **Subject Consented** field with a “Yes” value, click [Register Subject].

5. You will be re-directed to the **Register Subject** page.

6. Register the patient onto the protocol per the [Register a New Subject] user guide.

**SEARCH FOR AN EXISTING PRE-SCREENING RECORD**

1. Navigate to Menu > Subjects > Pre-Screening.
2. On the resulting search form, change the **Entered Date From** date to 01/01/1900 to include all possible dates.
3. Select your management group from the **Management Group** drop-down list.

4. Click [Submit].
5. On the Search Results screen, locate your patient and confirm that the Pre-Screening record is associated with the appropriate protocol (patients can have multiple Pre-Screening records – but usually only one per protocol).

Note: The Subject Identifier field is a free text field; study teams are able to enter anything in this field. When establishing a Pre-Screening record, we STRONGLY recommend that you use the UF Health Epic MRN.

6. Click on the blue Pre-Screening ID link to open the patient’s record.
7. Click [Update] to add more information to the patient’s record.
8. If you can’t find the patient, or the record is for another protocol, click the [Back] button and create a new Pre-Screening record (see previous section).

### RECORD A PRE-SCREENING FAILURE

If your management group has chosen to use the Pre-Screening functionality, you may wish to track Pre-Screening failures. These are potential subjects that have not been consented and the study team has ruled them out based on pre-screening activities (e.g. they do not meet basic eligibility criteria).

These patients would only be documented in the Pre-Screening Console (i.e. they would not have a subject record in the Subject Console).

1. Create or find the Pre-Screening record for the patient (see previous sections).
2. The Subject Consented field should have “No” selected.
3. The Subject Eligible field should have “No” selected.

### RECORD A SCREENING FAILURE

Screen failures for consented subjects must be recorded in the Oncore Subject Console. See the Document a Screening Failure user guide for instructions.

If your management group has chosen to use the Pre-Screening functionality, you may wish to also track Screening Failures in the Pre-Screening console.

1. Create or find the Pre-Screening record for the patient (see previous sections).
2. The Subject Consented field should have “Yes” selected.

The Subject Eligible field should have “No” selected.