

**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:

- 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**
- If using **Subject Consented** field with a “Yes” value, click **[Register Subject]**.
- You will be re-directed to the **Register Subject** page.
- Register the patient onto the protocol per the [Register a New Subject](#) user guide.

## SEARCH FOR AN EXISTING PRE-SCREENING RECORD

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

Pre-Screening Database Search

Search Criteria

Entered Date From: 01/01/1900

Entered Date Thru: 05/10/2018

Entered By: Type here to search

Management Group: Type here to search

Evaluated By: Type here to search

Subject Identifier:

Protocol No.: Type here to search

New Submit Clear

Copyright© 2001-2018 Forte Research Systems. All rights reserved.

- 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**.

Pre-Screening ID	Management Group	Subject Identifier	Entered By	Entered Date	Contact Date	Protocol No.
22258	OCR - Training Environment	E0000013	Rules, Amilyn Holdo	04/30/2018	04/30/2017	OCR10002

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.