# TRACK OCR SUBMISSIONS WITH ONCORE TASK LISTS

**Description:** In OnCore, a **Task List** is a group of related tasks that can be managed in one place. At UF, **OCR Task Lists** are used to direct, track, and coordinate the Office of Clinical Research internal team workflows during study start-up or when a study needs to be amended.

## OCR SERVICES WORKFLOW

OCR submissions begin with OCR Intake Forms. Based on the study data submitted, the OCR Intake Team determines what OCR services will be required. As applicable, different OCR teams will work on your study simultaneously. For detail, see the OCR Services Workflow Diagram.

While the different OCR teams are reviewing and processing your submission, you may receive email communications from different OCR teams as they work on their part of the submission; these emails typically only address that particular team's work.

To get a broader picture of what is happening with your OCR submission, use **Task Lists** in OnCore to track your study's progress overall.

## VIEW ALL TASK LISTS FOR YOUR STUDY

1. Navigate to **Menu > PC Console > Status > Task Lists.**

2. Find your study using the **Select Protocol** search field.

3. The **Task Lists** tab will display a list of all task lists associated to this study.

4. For each task list, you will see a summary which includes the following for each task list:



a. **Name –** Name of the task list  *Note: All OCR task list names begin with "OCR"*

b. **Status -** New, In Progress, or Complete

c. **Previous Task -** Most recently completed task within the Task List

d. **Completed Date -** Date that the Previous Task was completed

e. **Current Task -** The task that OCR is currently working on

f. **Target Date -** The date that OCR expects to complete the Current Task.
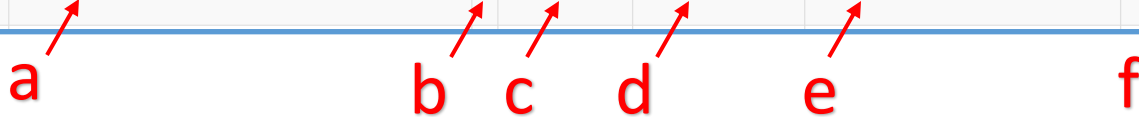
## VIEW ALL TASKS WITHIN A TASK LIST

1. To see all tasks within a particular Task List, click on **the blue Task List** hyperlink in the Name column.

| Workflow Order | Name | Status | Previous Task | Completed Date | Current Task | Target Date |
|---|---|---|---|---|---|---|
| 1 | OCR - Study Start-Up -AHC - OCR19393 | In Progress | Shell created | 10/29/2018 | OnCore calendar build completed | 11/05/2018 |

2. You will see a list off all possible OCR tasks associated with this task list.

| # | Name | NA | Target Date | Completed Date | Owner | |
|---|---|---|---|---|---|---|
| 1 | Intake form submitted | ☑ | | | OCR - Intake Coordinator | Communications 1 / Attachments 0 |
| 2 | Intake verified | ☑ | | | OCR - Intake Coordinator | Communications 1 / Attachments 0 |
| 3 | Shell created | ☐ | 10/29/2018 | 10/29/2018 | OCR - Intake Coordinator | Communications 1 / Attachments 0 |
| 4 | intake decision tree | ☐ | | | OCR - Intake Coordinator | Communications 0 / Attachments 0 |

a    b    c    d    e    f

3. For each task, you will see the following:

   a. **Name** – Task name

   b. **NA** – If OCR determined that this task is not applicable to your study, the NA box will be checked

   c. **Target Date** – The date that OCR expects or expected to complete that task

   d. **Completed Date** – Date the task was completed

   e. **Owner** – The OCR staff role assigned to this task. To determine the specific OCR staff member who was assigned, you will need to look at the study's Staff tab and see who in OCR was assigned to this role.

   f. Each task also has a place to view **Communications** and **Attachments** that pertain to that task.

4. Click on the blue Communications link to open a pop-up window where you can view any communication notes that have been added by OCR staff.

5. Click on the blue Attachments link to open a pop-up window where you can view any attachments that have been added by OCR staff.

## HOW TO GET HELP

If you have questions or need help viewing/understanding a study's task list, contact the **OCR Intake Team** or the **OnCore Support Team.**

   o **OCR Intake Team** OCR-Intake@ahc.ufl.edu  (352) 273-7616

   o **OCR OnCore Support** OnCore-Support@ahc.ufl.edu  (352) 273-5924