Description: My Console is designed to assist study team members manage subjects across any of their protocols that are fully utilizing the OnCore calendar functionality. It provides a means to view and verify visits without having to access each subject individually from the CRA Console and/or Subject Console.

This tip sheet describes how to use My Console to do the following:

- View Protocols Assigned to You
- View Subjects Assigned to You
- View and Update Occurred Subject Visits
- View and Update Pending Subject Visits
- View My Calendar

Audience: Study Team members who are responsible for tracking subject visit data in OnCore.

VIEW PROTOCOLS ASSIGNED TO YOU

- Navigate to Menu > My Console > Protocols. The initial My Console page will take you directly to the Protocols menu vertical tab.

- You will see all a list of protocols to which you have been assigned via each protocol’s PC Console > Staff tab.

- A protocol must have an active status of Open to Accrual, Closed to Accrual, or Suspended in order to appear in My Console.

- On the Protocols menu, the columns can be sorted by the column headings.

- Clicking on a Protocol No. hyperlink will take you to the PC Console for that protocol.
USE MY CONSOLE TO MANAGE SUBJECT VISITS

VIEW SUBJECTS ASSIGNED TO YOU

- Navigate to Menu > My Console > Subjects.
- You will see a list of subjects to which you have been assigned via each subject’s On Study > Subject Staff fields.
- The subject identification information displayed may differ depending on your role in OnCore.

<table>
<thead>
<tr>
<th>Subjects</th>
<th>A</th>
<th>A</th>
<th>A</th>
<th>A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protocols</td>
<td>Subjects</td>
<td>Subject ID</td>
<td>Last Name</td>
<td>First Name</td>
</tr>
<tr>
<td>OCR19378</td>
<td>E0000002</td>
<td>Zed</td>
<td>Ken</td>
<td>TS-Subject-20</td>
</tr>
<tr>
<td>OCR19385</td>
<td>E0000002</td>
<td>Zed</td>
<td>Idita</td>
<td>TS-Subject-19</td>
</tr>
<tr>
<td>OCR19395</td>
<td>E0000002</td>
<td>Zed</td>
<td>Sebastion</td>
<td>TS_Patient_Zero</td>
</tr>
</tbody>
</table>

- Initially, only active subjects on active protocols are shown, but this can be changed using the Subject Status dropdown filter in the upper right corner of the page.
- Unchecking the Show Active Protocols Only checkbox will expand the display to subjects from all of your currently assigned protocols.
- On the Subjects and Subject Visits menus, the columns can be sorted by the column headings.
- A secondary sort can be applied to the table by right-clicking on a column heading and selecting a secondary sort column from the list.

- Once you select a column or columns for sorting, that sort preference will remain intact for you on this page until you select a new sort order. This remains true even after you log out of the application and later log back in.
- Clicking on a Subject MRN hyperlink will take you to the Subject Console > Demographics menu for that participant.
- If there is a reconsent requirement for a subject, the Consent Signed Date field will display the date as a blue hyperlink with an RR superscript. Clicking the link will take you directly to the Subject Console > Consent menu where you can quickly re-consent the subject.

Need Help? Contact UF OnCore Support Team OnCore-Support@ohc.ufl.edu 352-273-5924
USE MY CONSOLE TO MANAGE SUBJECT VISITS

VIEW AND UPDATE OCCURRED SUBJECT VISITS

- Navigate to Menu > My Console > Subject Visits > Occurred Visits.
- This menu will only display your assigned protocols that have fully-utilized calendars.
- You will see a list of OCCURRED visits for subjects to which you have been assigned via each subject’s On Study > Subject Staff fields.

You can sort by column headings and click Save Sort Preferences if there’s a particular sorting method you prefer.

If you want to view the information from this menu in a PDF or Excel file, click the corresponding button at the lower right to do so.

The Occurred Visits page allows you to enter the following dates fields for multiple Occurred visits:
  - CRF Completed - linked to the Data Collection Completed Date field on the Subject Visit Update page.
  - CRF Submitted - linked to the Submitted Date field on the Subject Visit Update page.
  - CRF Monitored - linked to the Monitored Date field on the Subject Visit Update page.

To update these fields with a given date, mark each checkbox that should reflect the date, enter the date into the bottom of the column, and click [Submit].

The dates will now appear in the linked fields on the Subject Visit Update page for each subject visit selected.
USE MY CONSOLE TO MANAGE SUBJECT VISITS

VIEW AND UPDATE PENDING SUBJECT VISITS

- Navigate to Menu > My Console > Subject Visits > Pending Visits.
- This menu will only display your assigned protocols that have fully-utilized calendars.
- You will see a list of PENDING visits for subjects to which you have been assigned via each subject’s On Study > Subject Staff fields.
- The From Date defaults to the current day and the Thru Date defaults to the current day plus two weeks. If you would like to see a different date range, enter the applicable dates and click the [Refresh] button.

- The Clinical Comments field is a read-only field which displays the value of the Clinical Comments field on the corresponding Subject Visit Update page.
- You can also click any blue Visit hyperlink to display the corresponding Subject Visit Update page.

- After updates are made on the Subject Visit Update page, you can navigate back to the My Console Pending Visits menu by clicking the Back to: My Console > Subject Visits > Pending hyperlink at the bottom of the page.
USE MY CONSOLE TO MANAGE SUBJECT VISITS

VIEW MY CALENDAR

- Navigate to Menu > My Console > Subject Visits > My Calendar.
- This menu will only display your assigned protocols that have fully-utilized calendars.
- My Calendar vertical menu displays a monthly, weekly or daily calendar with the visits of your currently assigned subjects and/or all subjects in your currently assigned protocols.

You can change your Calendar view options by clicking the appropriate icon in the top center of the page:
- The left most Icon will display a daily view
- The second icon displays a weekly view
- The third icon displays a monthly view
- The right most icon returns the display to the current month/week/day, depending on your current view.

At the bottom of the page, selecting the Include Subjects From Assigned Protocols checkbox will display subjects from protocols where you are currently assigned as protocol staff.

Selecting the Include Assigned Subjects checkbox will display subjects that you are currently assigned to as subject staff.