

**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.

My Console			
Protocols			
	Protocol No.	Title	Status
	<a href="#">OCR19378</a>	Training Study in production this will match the title as it appears on the IRB protocol.	OPEN TO ACCRUAL
	<a href="#">OCR19394</a>	EZ-AHC-005 <The title as it appears on the protocol>	OPEN TO ACCRUAL

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- 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.

## 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.**

My Console

Protocols | Subjects Show Active Protocols Only  Subject Status: Active

Protocol No.	Subject MRN	Last Name	First Name	Seq No.	Arm	Level	Study Site	Consent Signed Date	On Study Date	Off Treatment Date	Off Study Date	Expired Date
OCR19378	<a href="#">E0000025</a>	Zed	Ken	TS-Subject-29	ArmA		UF Gainesville	11/29/2017	02/02/2018			
OCR19378	<a href="#">E0000002</a>	Zed	Idris	TS-Subject-01	ArmA		UF Gainesville	11/14/2017	01/18/2018			
OCR19378	<a href="#">E0000001</a>	Zed	Sebastian	TS_Patient_Zero			UF Gainesville	11/14/2017	01/01/2018			
OCR19385	<a href="#">E0000002</a>	Zed	Idris	TS-Subject-29	ArmA		UF Gainesville	11/29/2017	02/02/2018			

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- 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.

My Console

Protocols | Subjects Show Active Protocols Only  Subject Status: All

Protocol No.	Subject MRN	Last Name	First Name	Seq No.	Arm	Level	Study Site	Consent Signed Date	On Study Date	Off Treatment Date	Off Study Date	Expired Date
OCR19378	<a href="#">E0000002</a>	Zed	Idris		ArmA		UF Gainesville	11/14/2017	01/18/2018			
OCR19385	<a href="#">E0000002</a>	Zed	Idris		ArmA		UF Gainesville	11/29/2017	02/02/2018			
OCR19378	<a href="#">E0000025</a>	Zed	Ken		ArmA		UF Gainesville	11/29/2017	02/02/2018			
OCR19378	<a href="#">E0000001</a>	Zed	Sebastian				UF Gainesville	11/14/2017	01/01/2018			

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Select Secondary Sort Column

- Protocol No.
- Subject MRN
- Last Name
- Seq No.
- Arm
- Level
- Study Site
- Consent Signed Date
- On Study Date
- Off Treatment Date
- Off Study Date
- Expired Date

- 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 re-consent 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](#).

My Console

Protocols | Subjects Show Active Protocols Only  Subject Status: All

Protocol No.	Subject MRN	Last Name	First Name	Seq No.	Arm	Level	Study Site	Consent Signed Date	On Study Date	Off Treatment Date	Off Study Date	Expired Date
OCR19378	<a href="#">E0000002</a>	Zed	Idris	TS-Subject-01	ArmA		UF Gainesville	<a href="#">11/14/2017<sup>RR</sup></a>	01/18/2018			
OCR19385	<a href="#">E0000002</a>	Zed	Idris	TS-Subject-29	ArmA		UF Gainesville	11/29/2017	02/02/2018			
OCR19378	<a href="#">E0000025</a>	Zed	Ken	TS-Subject-29	ArmA		UF Gainesville	<a href="#">11/29/2017<sup>RR</sup></a>	02/02/2018			
OCR19378	<a href="#">E0000001</a>	Zed	Sebastian	TS_Patient_Zero			UF Gainesville	<a href="#">11/14/2017<sup>RR</sup></a>	01/01/2018			

RR - Denotes a re-consent requirement currently exists.

## 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.

Protocol	Subject MRN	Last Name	First Name	Seq No	Phase	Segment	Visit	Visit Date	CRF Completed	CRF Submitted	CRF Monitored
OCR19378	E0000001	Zed	Sebastian	TS_Patient_Zero	Treatment	Baseline	Screening	11/14/2017	11/15/2017		

- 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.

Protocol	Subject MRN	Last Name	First Name	Seq No	Phase	Segment	Visit	Visit Date	CRF Completed	CRF Submitted	CRF Monitored
OCR19378	E0000025	Zed	Ken	TS-Subject-29	Treatment	On Treatment	C3D1	03/30/2017	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OCR19378	E0000025	Zed	Ken	TS-Subject-29	Treatment	On Treatment	C1D1	02/03/2017	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
OCR19378	E0000025	Zed	Ken	TS-Subject-29	Treatment	On Treatment	C2D1	03/02/2017	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OCR19378	E0000025	Zed	Ken	TS-Subject-29	Treatment	On Treatment	C2D15	03/20/2017	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OCR19378	E0000001	Zed	Sebastian	TS_Patient_Zero	Treatment	Baseline	Screening	11/14/2017	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- 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.

Protocol No.: OCR19378      Protocol Status: OPEN TO ACCRUAL  
 Subject MRN: E0000025      Subject Name: Ken Zed

Phase: Treatment

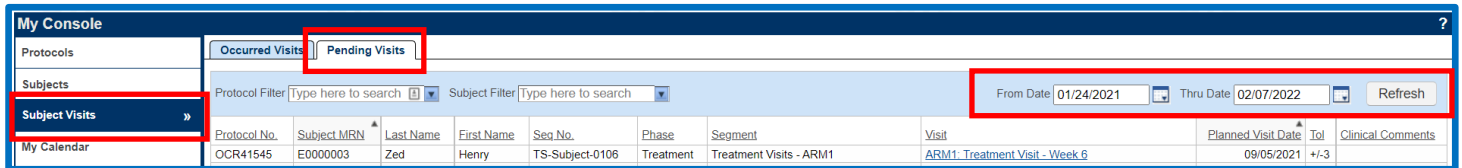
Visit Date: 02/03/2018      Visit Status:  Planned  Occurred  Missed  N/A      Visit Tolerance: +/-1

Visit Description: [Empty]      Reset Calendar?: No

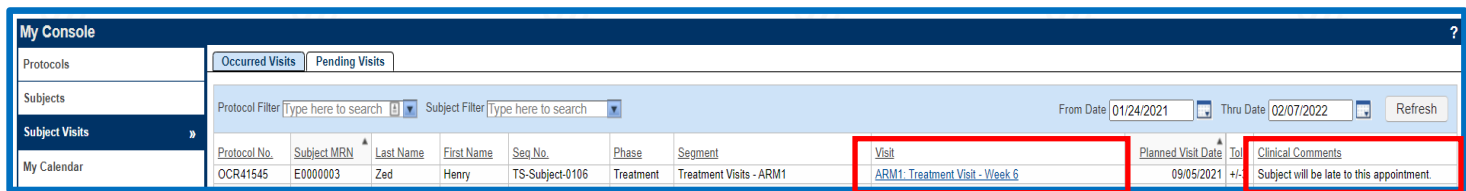
Data Collection Completed Date: 02/05/2018      Monitored Date: [Empty]      Submitted Date: 02/10/2018

## VIEW AND UPDATE PENDING SUBJECT VISITS

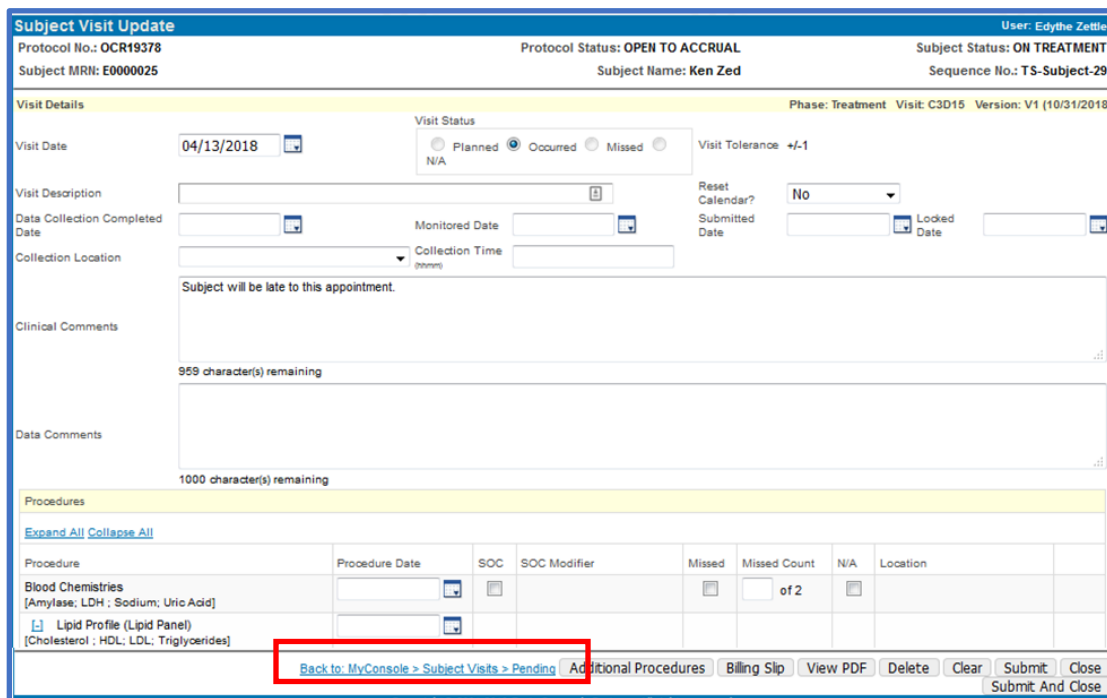
- Navigate to **Menu > My Console > Subject Visits > Pending Visits**.
- **This menu will only display your assigned protocols that have fully-utilized calendars.**
- You will see a list of **PENDING** visits for subjects to which you have been assigned via each subject's **On Study > Subject Staff**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

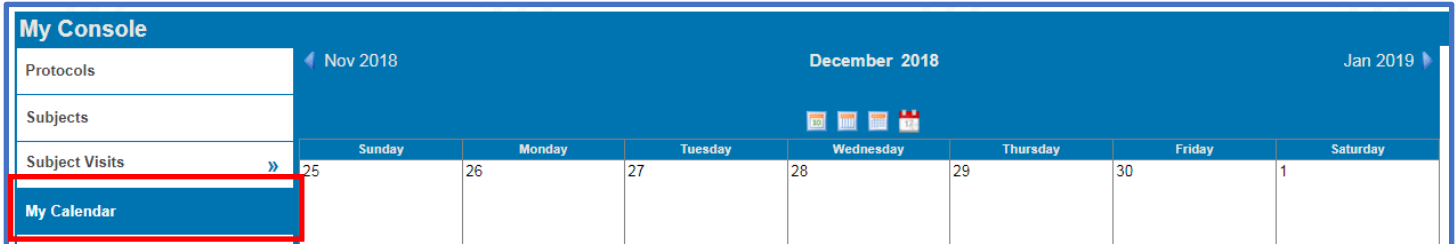


- After updates are made on the **Subject Visit Update** page, you can navigate back to the **My Console Pending Visits** menu by clicking the **Back to: My Console > Subject Visits > Pending** hyperlink at the bottom of the page.

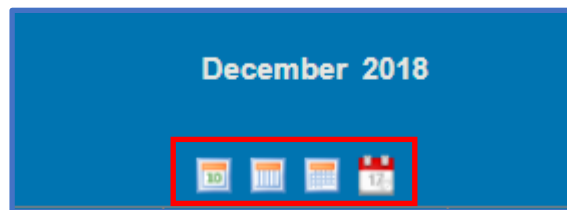


## VIEW MY CALENDAR

- 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**.

