

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.

Audience: Study team members responsible for any of the following:

- Documenting regulatory reviews
- Reviewing coverage analysis
- Negotiating budgets
- Paying and/or reconciling UF Health invoices

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 or may present a task that the study team needs to complete.

THE DAILY DIGEST OUTPUT

PROTOCOL_NO	TASK_LIST_NAME	TASK_NAME	COMMUNICATION_TEXT	STATUS	TARGET_DAYS	TARGET_DATE	TOTAL_DAYS_FROM_TASKLIST_START	ACCRUAL
OCR#####	OCR-Start...	QAP10: Ensure study team documentation of IRB approval	All communication for a particular task	NEW	##	5-Nov-19	1090	10
OCR#####	OCR-CLOSEOUT-V1...	FIN30: CLOSEOUT-V1-Enter financial closure date		IRB STUDY CLOSURE	##	24-Aug-22	769	11
OCR#####	OCR-ASRF-V6...	A-COV30: Revise OnCore budget and/or billing designations		OPEN TO ACCRUAL	##	10-Sep-22	733	12
OCR#####	OCR-ASRF-V6...	A-COV30: Revise OnCore budget and/or billing designations		OPEN TO ACCRUAL			733	0

- **Protocol No:** OnCore auto-generated protocol number assigned at protocol creation.
- **Task List Name:** Name of the task list *Note: All OCR task list names begin with "OCR".*
- **Task Name:** Description of the task to be completed.
- **Communication Text:** Communication notes that have been added by OCR Staff to provide information, clarification, or instructions.
- **Status:** Current Protocol status
- **Target Days:** Number of days task is expected to require to complete.
- **Target Date:** The weekday that OCR expects or expected to complete that task which is calculated based on when the task was assigned plus the number of target days. Does not include weekends.

5-Nov-19
24-Aug-22
10-Sep-22

- **2 days or more after target date**
- **1 day before to 1 day after target date**
- **2 or more days before the target date**
- **Could not be calculated because no systemic goal**

- **Total Days from Tasklist Start:** Number of days since task list was created.
- **Accrual:** Actual patient accrual defined by the Subject **"On Study"** status.

For more information about task lists, go to [Track OCR Submissions with OnCore Task Lists](#)