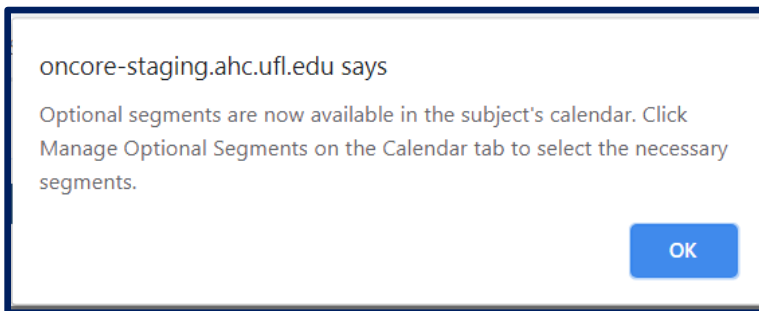# MANAGE OPTIONAL CALENDAR SEGMENTS

Description: OnCore calendars can be built in a variety of ways in to fulfill protocol requirements. Optional Calendar Segments can be used if a portion of the calendar is not required for all subjects or if costs vary by treatment arm. Optional Treatment Segments can be used for the following subject status triggers:

- Consent Signed
- On Study
- Off Treatment
- Off Study

Audience: Study team members who are responsible for recording study visits in OnCore.

OPTIONAL SEGMENTS

If a calendar segment is built using the Optional Calendar Segment, this segment will not automatically populate on the subject calendar. Instead, when a subject reaches a status that uses Optional Calendar Segments, you will receive a message like this:

> oncore-staging.ahc.ufl.edu says
>
> Optional segments are now available in the subject's calendar. Click Manage Optional Segments on the Calendar tab to select the necessary segments.
>
> **OK**

By default, the subject calendar displays only required segments. The **Manage Optional Segment** button is enabled for a segment after the corresponding start date has been entered for the subject. For example, the button for **Consent Signed** segments are enabled after the **Consent Signed** date is entered.

Clicking the **[Manage Optional Segments]** button allows you to select optional segments to include in the subject's calendar.

1. **Find your subject.**

2. On the subject record in the Subject Console, click the **Calendar** vertical tab.

3. Click the **[Manage Optional Segments]** button.

4.   Select the checkboxes for the optional segments to include and click **[Submit].**

USEFUL INFORMATION

➢ Optional segments can be removed from the subject calendar by clearing the checkboxes.

➢ If a visit within an optional segment has been marked as **Occurred**, that visit must first be deleted before the checkbox for the optional segment can be cleared.

➢ When a visit is checked in, the checkbox for the corresponding optional segment is disabled.

➢ If the **start date** for an optional segment is removed, the corresponding optional segments are removed from the subject calendar. When the **start date** is re-entered, the corresponding optional segments can again be selected.

NEED HELP?

If you would like to meet with OnCore Support and/or the Calendar Team to walk through your study, do not hesitate to **Request a Consult**.

If you have any questions or concerns about your calendar, contact us via **OnCore-Support@ahc.ufl.edu** or **Oncore-Calendars@ahc.ufl.edu**.