# 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 calenda Manage Optional Segments on the Calendar tab to select the segments.	
	ОК

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.

★ Subject Console							
Protocol No.: OCR33677		Protocol Status: OPEN TO ACCRUAL					
Subject MRN: E0000024	Subject Name: Taika Zed						
Switch Subject Type here to search	Calendar Orphaned Visits 3	-					
Summary	Freeze Panes Summary Manage Optional Segments Current Subject Calendar Version - v2						
Demographics				Treatment			
		Procedure Toggle Full Screen Planned Date	Forms	Baseline 1@1Days	Off Treatment 1:2@2Weeks		
Consent				1	2	3	
Eligibility		Planned Date		Screening 06/09/2019	W1	W2	
		Visit Status		00/00/2010			
On Study		Visit Date					
Treatment		Epic Timeline Management		x	x		
		Informed Consent		x			
Follow-Up		Adverse Events		x			
SAEs		Physical Exam					
2		Physical Exam		х		x	
Calendar »		Blood Chemistries Amylase; LDH ; Sodium; Uric Acid			2X		
Calendar »		Linid Profile (Linid Panel)					

## MANAGE OPTIONAL CALENDAR SEGMENTS

UF OnCore Tip Sheet

Version 05/31/21

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

Anage Optional Segments elect the optional segments to include in the su	ubject's calendar.	0 x
Consent Signed		
Segment Name		Select?
PK Substudy (OPTIONAL)		
	Submit	Close

Procedure Toggle Full Screen	Forms	Treatment							
		Baseline PK Substudy (OPTIONAL) (Opt) 1@1Days 1:5@5Days						Off Treatment 1:2@2Weeks	
		1	2	3	4	5	6	7	8
		Screening	<u>D1</u>	<u>D2</u>	<u>D3</u>	<u>D4</u>	<u>D5</u>	W1	W2
Planned Date		06/09/2019	06/09/2019	06/10/2019	06/11/2019	06/12/2019	06/13/2019		
Visit Status									
Visit Date									
Epic Timeline Management		х						х	
Informed Consent		х							
Adverse Events		х							
Physical Exam		v							~

#### 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 <u>OnCore-Support@ahc.ufl.edu</u> or <u>Oncore-Calendars@ahc.ufl.edu</u>.