

Description: Before obtaining UF OnCore access, new UF OnCore users must take some required training and become familiar with some basic access concepts and terminology.

Audience: New UF OnCore Users

UF OnCore Access - Basics

ONCORE STAFF: CONTACTS vs. USERS

- **OnCore Contacts** are individuals/staff who ***DO NOT HAVE ACCESS*** to OnCore but can be associated with protocols and subjects in OnCore.
- **OnCore Users** can login to OnCore and view/update OnCore records in accordance with their given roles and permissions.
- When the OnCore Support team sets up a user account, they first create an **OnCore Contact** record, and then activate it as an **OnCore User**. This means that all **Users** are also **Contacts**.
- Requests to add/update OnCore contacts and users are submitted via the [Add/Update OnCore Staff](#) webpage

ONCORE USER ACCOUNTS

- Before you request an OnCore User account, the new user must first complete the online [IRB803: IRB Training \(with HIPAA\)](#) course PLUS the [OCR810: Introduction to OnCore](#) course, which has an online component in [myTraining](#) plus exercises to complete in the **OnCore Training** environment.
- Once you have completed OCR810, you may now request access by doing the following:
 1. Fill out the [OnCore Access Request Form](#)
 2. Obtain the **authorization signature** from your Manager/Supervisor
 3. Submit the signed request form via the [Add/Update OnCore Staff](#) webpage.

BROWSER TIPS

- OnCore supports most conventional **web browsers** (e.g. Chrome, Safari, Internet Explorer and Firefox). See the [Browser Tips](#) user guide for details.
- OnCore uses many **pop-up windows** that allow you to make selections and enter data. You must set your browser to allow pop-ups in order to use OnCore. See the [Disable Pop-Up Blockers](#) user guide for details.

ONCORE LOGIN

- The **OnCore application** can be accessed at the following URL: <https://ufl-oncore-prod.advarra.app/>.
- OnCore uses **GatorLink authentication**, which means that once you get your OnCore account, **you will use your GatorLink credentials** to login to the system.
- Repeated unsuccessful login attempts will result in suspension of your OnCore account. If this happens, contact OnCore-Support@ahc.ufl.edu for assistance and your account will be reactivated.
- **Forgotten or expired password issues** are managed in the myUFL system (**NOT** in OnCore) and usually can be resolved quickly by calling the UF IT Help Desk (352) 392-4357.
- After logging into OnCore, the system begins a 30 minute login session. After 30 minutes, the system will ask you to select "Continue" to renew your session for another 30 minutes. This cycle will repeat every 30 minutes.

UF OnCore Access - Terminology and Concepts

ACCESS COMPONENTS

The user access assigned to you is defined by a combination of three components:

- **Areas** of OnCore that you can get to - e.g. a console, a specific tab/page, or occasionally just one field
- **Actions** you can take - e.g. view, add, edit, or delete information on a page
- **Records** you can access - e.g. specific protocols, subjects, organizations, contacts, audits, registries, etc.

STAFF ROLE vs. USER ROLE

- A contact can be assigned to specific protocols and/or subjects to document their **Staff Role** for that protocol or subject e.g. Principal Investigator, Primary Study Coordinator, IRB Coordinator, etc.
- A contact can have **multiple staff roles** for a given protocol or subject.
- Staff roles also determine who gets OnCore-generated notifications or assigned tasks in an OnCore Task List.
- Staff roles are typically assigned by study team members who have been granted "edit" access to the Study Staff tabs and pages in OnCore. See the [Assign Study Staff](#) user guide for more detail.
- A **User Role** is part of what makes up the OnCore user access granted by the OnCore Support team. Also, see the **User Roles vs. Permissions** section below.

USER ROLES vs. PERMISSIONS

- A **User Role** in OnCore defines what **areas** you can access. The OnCore Support Team can also use roles to limit a users' access to appropriate protocols and subjects. A user can be assigned multiple roles. Examples of user roles at UF are:
 - Financial Coordinator
 - Study Coordinator
 - Study Team Manager
- **Permissions** control the **actions** that you can take within the areas and records accessed by your role(s).

PROTOCOL ACCESS vs. MANAGEMENT GROUP ACCESS

- In addition to roles and permissions, users are granted access by **Protocol** or by **Management Group**.
- **Protocol** access means that you may only access protocols on which you are listed as study staff.
- **Management Group** access means that you can access all protocols in your designated Management Group. See the [Management Groups](#) section below.

LIBRARIES

A **Library** in OnCore determines the OnCore Fields, Reference Lists, Forms, Protocol Annotations, Notifications, and Sign-offs available for a given protocol. UF has two Libraries in OnCore:

- Academic Health Center
- Oncology

ORGANIZATIONAL UNITS

Organizational Units (also known as OUs) represent the *broadest* divisions, business units, or distinct reporting entities at an institution. UF has two Organizational Units in OnCore:

- Academic Health Center
- Cancer Center



*The **Organizational Unit** for a protocol of should always align with the **Library** for that protocol:*

Academic Health Center – Academic Health Center

Cancer Center – Oncology

Mismatches must be corrected by the OnCore Support team.

MANAGEMENT GROUPS

- OnCore **Management Groups** represent smaller teams, specialties, or functional areas within an Organizational Unit.
- A management group often represents a particular treatment specialty, like cardiology or endocrinology.
- Management groups belong to exactly one OU.
- After a protocol is associated with an OU, it can be associated with one or more management groups within the selected OU.
- Every protocol should have a **Primary** management group indicated (even if there is just one management group). In standard OnCore reports, accrual will count for the **Primary** management group.

DEPARTMENTS

- OnCore **Departments** are independent of OUs and management groups. A department might be associated with several protocols across multiple OUs.
- A department usually identifies a financial reporting area.
- At UF, most departments in OnCore align with departments as defined in the university's college structure.
- Every protocol in OnCore is associated with one department (typically the Principal Investigator's "home" department).

ORGANIZATIONS AND STUDY SITES

- The logical groupings within an organization (organizational unit, management groups, and departments) are also used to categorize and identify contacts in OnCore and grant appropriate access.
- Access to protocols and subjects in OnCore is always limited by the organizations and/or study sites listed in the **Organization Access** field in a user's contact record.

ACCESS TO SUBJECT DATA

Two special permissions control access to subject data throughout OnCore:

- **Subject Identification** - This permission allows users to see subjects' full names, MRNs, and Social Security numbers.
- **Subject Initials** - This permission allows users to see subjects' initials instead of full names and asterisks (***) instead of MRNs and Social Security numbers.