REGISTER A NEW SUBJECT

UF OnCore Tip Sheet

Version 06/06/2023
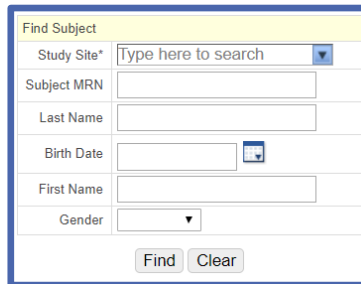
Description: Study subjects are registered to protocols in OnCore to facilitate subject visit tracking, sponsor invoicing, and enrollment reporting.

REGISTER A SUBJECT INTO A STUDY

1. Navigate to **Menu > Subjects > CRA Console.**

2. **Find your study** using the **Select Protocol** search field.

3. To display all registered subjects, make sure the display filter at the upper right is set to **All.**

4. Select **Register Subject** from the vertical menu bar.

5. In the **Find Subject** block, select your **Study Site** from the drop-down menu.

Find Subject	
Study Site*	Type here to search ▾
Subject MRN	
Last Name	
Birth Date	
First Name	
Gender	▾
	Find Clear

6. In the **Subject MRN** field, enter the patient's **UF Health MRN** and click **[Find].**

7. If no match is found, click **[Clear]** and repeat your search using a combination of the patient's **Last Name, Birth Date, First Name,** and **Gender**.

> ⚠️ *If you still do not find a matching record, contact* Oncore-Support@ahc.ufl.edu.
>
> *Any subject receiving study-required UF Health clinical services **MUST** have a UF Health MRN.*
>
> *Subjects who do not have a UF Health MRN **and** will **NOT** receive any UF Health clinical services may qualify for the **No UF Health MRN** functionality. See Special Cases section below.*

8. The subject's **Epic ID** (which begins with the letter E - e.g. E123456) will be used as the OnCore **Subject MRN**.

9. Select your subject from the **Results** block by clicking the blue **Subject MRN** (Epic ID) hyperlink.

Results							Count: 322
Subject MRN	Addl Subj IDs	Last Name	First Name	Middle Name	Suffix	Gender	Birth Date
E0000001		Zed	Sebastian Stan			M	08/13/1982
E0000002		Zed	Idris Elba			M	09/06/1972
E0000003		Zed	Henry Cavill			M	05/05/1983
E0000004		Zed	Hugh Jackman			M	10/12/1968
E0000005		Zed	Bruno Mars			M	10/08/1985
E0000006		Zed	John Leguizama			M	07/22/1964

10. The **Subject Details** block will now be populated with the patient's data from Epic. Verify that all the required fields (indicated by *) are complete and correct.

11. Click the **[Add]** button.

12. Enter additional fields as required by your management group and allowed by the protocol and IRB.

13. Click **[Submit]** to save.

14. Return to the **CRA Console** to confirm your new subject.

*Need Help? Contact **UF OnCore Support Team** OnCore-Support@ahc.ufl.edu (352) 273-5924*   ***Page 1 of 3***

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SPECIAL CASES

All subjects receiving study-required UF Health clinical services **MUST** have a UF Health MRN in Epic and OnCore. However, some protocols

- Do not require UF Health clinical services for any subjects *or*

- Have several groups of participants - some subjects receive a study intervention but others are only minimally involved (e.g. a parent who is coming in to complete a study survey).

These studies can be configured to allow auto-generation **of OnCore-only Subject MRNs** for subjects who do not already have a UF Health MRN in Epic.

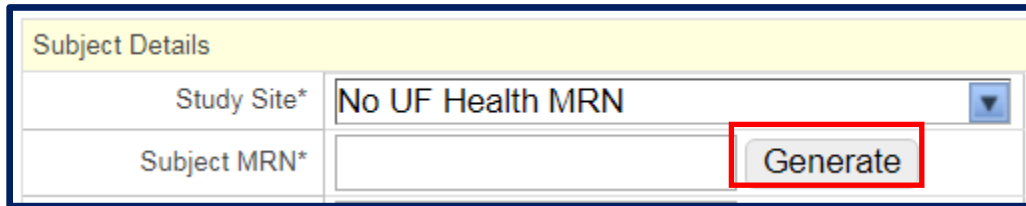Contact Oncore-Support@ahc.ufl.edu for more information and assistance with protocol configuration in OnCore.

REGISTER A SUBJECT INTO A STUDY WITH MRN AUTO-GENERATION ALLOWED

1. Navigate to **Menu > Subjects > CRA Console.**

2. **Find your study** using the **Select Protocol** search field.

3. To display all registered subjects, make sure the display filter at the upper right is set to **All.**

4. Select **Register Subject** from the vertical menu bar.

5. **First, check to see if the subject already has a UF Health MRN. If so, use it as the OnCore Subject MRN – This will help eliminate duplicate subject records in OnCore:**

   a. In the **Find Subject** block, select your **Study Site** (**UF Gainesville** or **UF Jacksonville**) from the drop-down menu.

   b. In the **Subject MRN** field, enter either the patient's UF Health MRN (if known) or search using a combination of the patient's **Last Name, Birth Date, First Name,** and **Gender**, then click **[Find].**

   c. If the subject has a UF Health MRN, select your subject from the **Results** block by clicking the blue **Subject MRN** (Epic ID) hyperlink.

   d. The **Subject Details** block will now be populated with the patient's Epic data. Verify that all the required fields (indicated by *) are complete and correct.

   e. Skip to Step 7 below.

6. If no UF Health MRN is found in Epic, **and your protocol is configured to allow auto-generation of MRNs**, you can auto-generate an OnCore-only MRN for this subject:

   a. In the **Find Subject** block, click the **[Create New]** button makes available the **Subject Details** block in order to auto-generate the **Subject MRN**.

b. In the **Subject Details** block, click the blue arrow in the **Study Site** field and select **No UF Health MRN** from the drop down-down menu.

Subject Details	
Study Site*	No UF Health MRN ▼
Subject MRN*	[Generate]

c. In the **Subject Details** block, click the **[Generate]** button to auto-generate the **Subject MRN**. The **OnCore-only** auto-generated MRN will contain a special prefix to reflect that it has been auto-generated.

⚠️ *DO NOT MANUALLY ENTER A NUMBER INTO THE SUBJECT MRN FIELD!*

d. Enter the rest of the required **Subject Detail** fields (indicated by *****).

7. Click the **[Add]** button.

8. Enter additional fields as required by your management group and allowed by the protocol and IRB.

9. Click **[Submit]** to save.

10. Return to the **CRA Console** to confirm your new subject.

⚠️ *If a subject is enrolled into a study using the "**No UF Health MRN**" method but subsequently gets a UF Health MRN, contact OnCore-Support@ahc.ufl.edu to resolve and avoid record duplication.*

CLICK HERE TO VIEW DEMO VIDEO