

Description: **My Console** is designed to assist study team members manage subjects across any of their protocols that are fully utilizing the **OnCore calendar functionality**. It provides a means to view and verify visits without having to access each subject individually from the **CRA Console** and/or **Subject Console**.

This tip sheet describes how to use **My Console** to do the following:

- View **Protocols** Assigned to You
- View **Subjects** Assigned to You
- View and Update **Occurred** Subject Visits
- View and Update **Pending** Subject Visits
- View **My Calendar**

Audience: Study Team members who are responsible for tracking subject visit data in OnCore.

VIEW PROTOCOLS ASSIGNED TO YOU

- Navigate to **Menu > My Console > Protocols**. The initial **My Console** page will take you directly to the **Protocols** menu vertical tab.

Protocols		
Protocol No.	Title	Status
OCR19378	Training Study in production this will match the title as it appears on the IRB protocol.	OPEN TO ACCRUAL
OCR19394	EZ-AHC-005 <The title as it appears on the protocol>	OPEN TO ACCRUAL

- You will see all a list of protocols to which you have been assigned via each protocol’s **PC Console > Staff** tab.
- A protocol must have an active status of **Open to Accrual**, **Closed to Accrual**, or **Suspended** in order to appear in **My Console**.
- On the **Protocols** menu, the columns can be sorted by the column headings.
- Clicking on a [Protocol No.](#) hyperlink will take you to the **PC Console** for that protocol.

VIEW SUBJECTS ASSIGNED TO YOU

- Navigate to **Menu > My Console > Subjects**.
- You will see a list of subjects to which you have been assigned via each subject's **On Study > Subject Staff** fields.
- **The subject identification information displayed may differ depending on your role in OnCore.**

My Console

Protocols Subjects Show Active Protocols Only Subject Status Active

Protocol No.	Subject MRN	Last Name	First Name	Seq No.	Arm	Level	Study Site	Consent Signed Date	On Study Date	Off Treatment Date	Off Study Date	Expired Date
OCR19378	E0000025	Zed	Ken	TS-Subject-29	ArmA		UF Gainesville	11/29/2017	02/02/2018			
OCR19378	E0000002	Zed	Idris	TS-Subject-01	ArmA		UF Gainesville	11/14/2017	01/18/2018			
OCR19378	E0000001	Zed	Sebastian	TS_Patient_Zero			UF Gainesville	11/14/2017	01/01/2018			
OCR19385	E0000002	Zed	Idris	TS-Subject-29	ArmA		UF Gainesville	11/29/2017	02/02/2018			

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- Initially, only active subjects on active protocols are shown, but this can be changed using the **Subject Status** dropdown filter in the upper right corner of the page.
- Unchecking the **Show Active Protocols Only** checkbox will expand the display to subjects from all of your currently assigned protocols.
- On the **Subjects** and **Subject Visits** menus, the columns can be sorted by the column headings.
- A secondary sort can be applied to the table by right-clicking on a column heading and selecting a secondary sort column from the list.

My Console

Protocols Subjects Show Active Protocols Only Subject Status All

Protocol No.	Subject MRN	Last Name	First Name	Seq No.	Arm	Level	Study Site	Consent Signed Date	On Study Date	Off Treatment Date	Off Study Date	Expired Date
OCR19378	E0000002	Zed	Idris		ArmA		UF Gainesville	11/14/2017	01/18/2018			
OCR19385	E0000002	Zed	Idris		ArmA		UF Gainesville	11/29/2017	02/02/2018			
OCR19378	E0000025	Zed	Ken		ArmA		UF Gainesville	11/29/2017	02/02/2018			
OCR19378	E0000001	Zed	Sebastian				UF Gainesville	11/14/2017	01/01/2018			

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- Once you select a column or columns for sorting, that sort preference will remain intact for you on this page until you select a new sort order. This remains true even after you log out of the application and later log back in.
- Clicking on a [Subject MRN](#) hyperlink will take you to the **Subject Console > Demographics** menu for that participant.
- If there is a re-consent requirement for a subject, the **Consent Signed Date** field will display the date as a blue hyperlink with an **RR** superscript. Clicking the link will take you directly to the **Subject Console > Consent** menu where you can quickly [re-consent the subject](#).

My Console

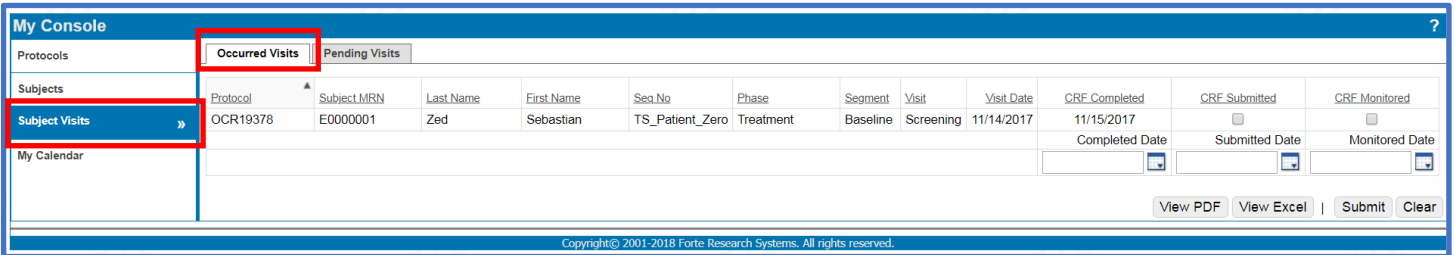
Protocols Subjects Show Active Protocols Only Subject Status All

Protocol No.	Subject MRN	Last Name	First Name	Seq No.	Arm	Level	Study Site	Consent Signed Date	On Study Date	Off Treatment Date	Off Study Date	Expired Date
OCR19378	E0000002	Zed	Idris	TS-Subject-01	ArmA		UF Gainesville	11/14/2017^{RR}	01/18/2018			
OCR19385	E0000002	Zed	Idris	TS-Subject-29	ArmA		UF Gainesville	11/29/2017	02/02/2018			
OCR19378	E0000025	Zed	Ken	TS-Subject-29	ArmA		UF Gainesville	11/29/2017^{RR}	02/02/2018			
OCR19378	E0000001	Zed	Sebastian	TS_Patient_Zero			UF Gainesville	11/14/2017^{RR}	01/01/2018			

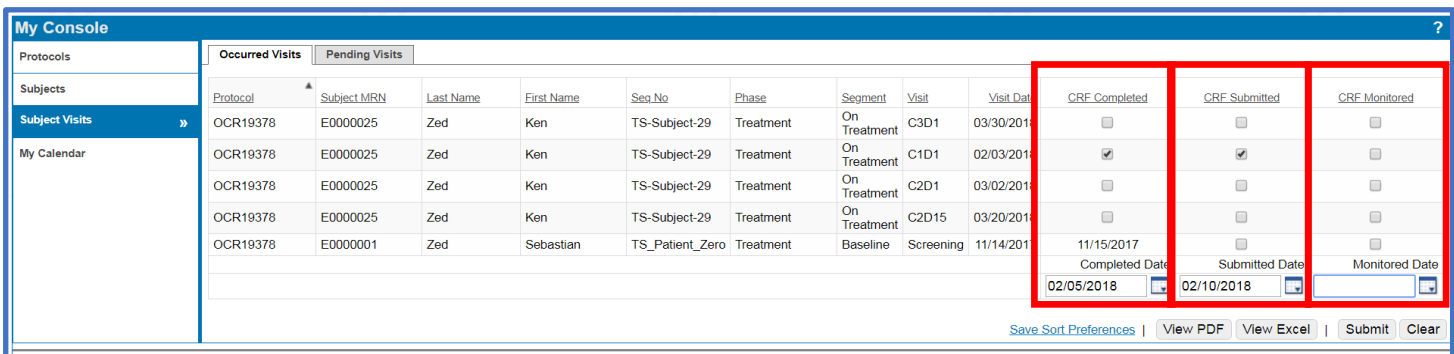
RR - Denotes a re-consent requirement currently exists.

VIEW AND UPDATE OCCURRED SUBJECT VISITS

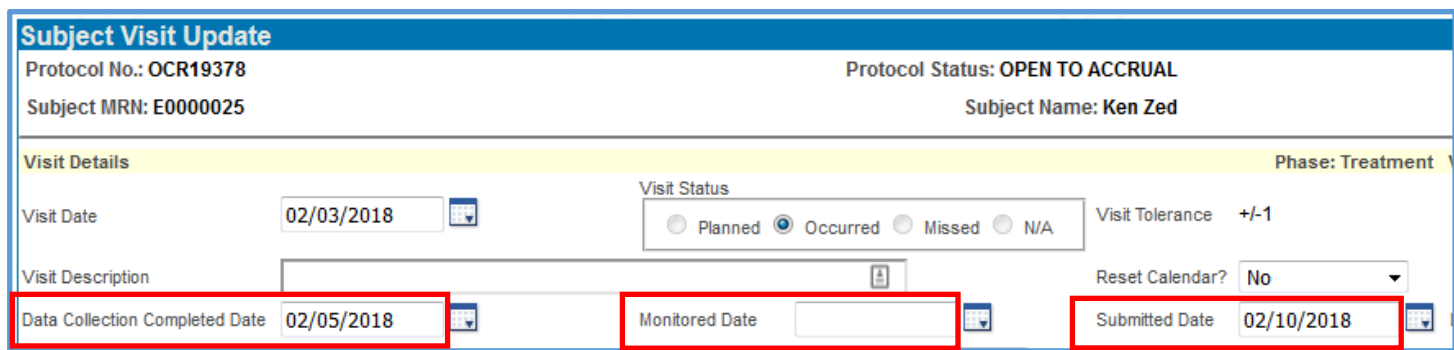
- Navigate to **Menu > My Console > Subject Visits > Occurred Visits**.
- **This menu will only display your assigned protocols that have fully-utilized calendars.**
- You will see a list of **OCCURRED** visits for subjects to which you have been assigned via each subject's **On Study > Subject Staff** fields.



- You can sort by column headings and click **Save Sort Preferences** if there's a particular sorting method you prefer.
- If you want to view the information from this menu in a PDF or Excel file, click the corresponding button at the lower right to do so.
- The **Occurred Visits** page allows you to enter the following dates fields for multiple **Occurred** visits:
 - **CRF Completed** - linked to the **Data Collection Completed Date** field on the **Subject Visit Update** page.
 - **CRF Submitted** - linked to the **Submitted Date** field on the **Subject Visit Update** page.
 - **CRF Monitored** - linked to the **Monitored Date** field on the **Subject Visit Update** page.



- To update these fields with a given date, mark each checkbox that should reflect the date, enter the date into the bottom of the column, and click **[Submit]**.
- The dates will now appear in the linked fields on the **Subject Visit Update** page for each subject visit selected.



VIEW AND UPDATE PENDING SUBJECT VISITS

- Navigate to **Menu > My Console > Subject Visits > Pending Visits**.
- **This menu will only display your assigned protocols that have fully-utilized calendars.**
- You will see a list of **PENDING** visits for subjects to which you have been assigned via each subject's **On Study > Subject Staff** fields.
- The **From Date** defaults to the current day and the **Thru Date** defaults to the current day plus two weeks. If you would like to see a different date range, enter the applicable dates and click the **[Refresh]** button.

The screenshot shows the 'My Console' interface with the 'Pending Visits' tab selected. A table lists visits for two subjects:

Protocol No.	Subject MRN	Last Name	First Name	Seq No.	Phase	Segment	Visit	Planned Visit Date	Tol	Actual Visit Date	Clinical Comments	Missed
OCR19385	E0000002	Zed	Idris	TS-Subject-29	Treatment	On Treatment	C3D1	03/30/2018	+/-1			<input type="checkbox"/>
OCR19378	E0000002	Zed	Idris	TS-Subject-01	Treatment	On Treatment	C4D1	04/12/2018	+/-1			<input type="checkbox"/>

- The **Pending Visits** page allows you to easily mark multiple visits as:
 - **Occurred** - enter the applicable **Actual Visit Date**.
 - **Missed** - click the **Missed** checkbox.
- The **Clinical Comments** field is a read-only field which displays the value of the **Clinical Comments** field on the corresponding **Subject Visit Update** page.
- You can also click any blue **Visit** hyperlink to display the corresponding **Subject Visit Update** page.

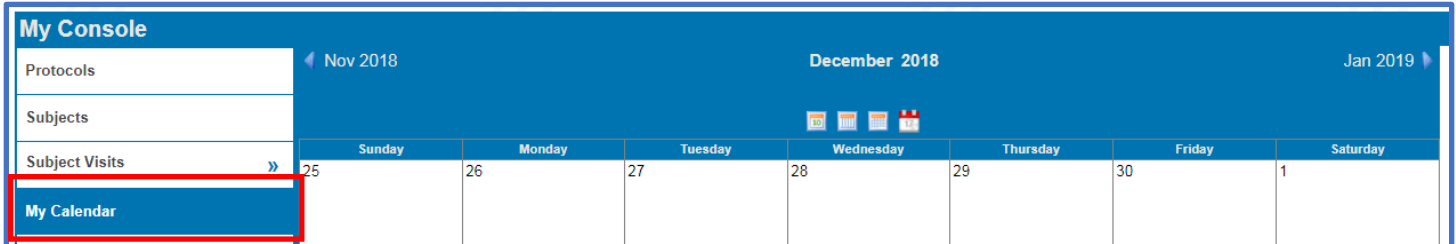
This screenshot shows the same table as above, but with the 'Visit' column for the second row (C3D15) highlighted. The 'Actual Visit Date' field is empty, and the 'Missed' checkbox is checked. The 'Clinical Comments' field contains the text 'Subject will be late to this appointment.'

- After updates are made on the **Subject Visit Update** page, you can navigate back to the **My Console Pending Visits** menu by clicking the **Back to: My Console > Subject Visits > Pending** hyperlink at the bottom of the page.

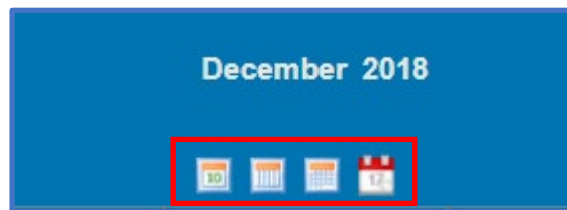
The screenshot shows the 'Subject Visit Update' page for Protocol No. OCR19378 and Subject MRN: E0000025. The subject is Ken Zed, and the visit is C3D15. The 'Visit Status' is set to 'Occurred' with a date of 04/13/2018. The 'Clinical Comments' field contains 'Subject will be late to this appointment.' At the bottom, a navigation bar includes the link 'Back to: MyConsole > Subject Visits > Pending'.

VIEW MY CALENDAR

- Navigate to **Menu > My Console > Subject Visits > My Calendar**.
- **This menu will only display your assigned protocols that have fully-utilized calendars.**
- **My Calendar** vertical menu displays a monthly, weekly or daily calendar with the visits of your currently assigned subjects and/or all subjects in your currently assigned protocols.



- You can change your **Calendar** view options by clicking the appropriate icon in the top center of the page:
 - The left most Icon will display a daily view
 - The second icon displays a weekly view
 - The third icon displays a monthly view
 - The right most icon returns the display to the current month/week/day, depending on your current view.



- At the bottom of the page, selecting the **Include Subjects From Assigned Protocols** checkbox will display subjects from protocols where you are currently assigned as **protocol staff**.
- Selecting the **Include Assigned Subjects** checkbox will display subjects that you are currently assigned to as **subject staff**.

