OnCore Communication Memo

Memo #: 13 –Effort Tracking Console-Update

To: Research Managers, CRCs/CRAs, Regulatory Staff, Finance, Lab, Beacon and CTO-AD
From: System Administrator
Effective Date: April 14, 2014

Purpose: Update the Categories/Tasks available in the Effort Tracking Console to facilitate more streamlined entry for end user.

Notes: Deleted non-essential Categories and Tasks in order to make the decision-making process less confusing for the end user. For a full list of the remaining Categories/Tasks, see spreadsheet below (color coded by user type).

Time-Off and Administration can/should be used by ALL staff members, choosing the Effort Tracking protocol ONLY for these two Categories. NO OTHER CATEGORIES should use Effort Tracking as the protocol.

Regulatory, Lab and Finance Category/Tasks did NOT change.

CRCs/CRAs (including Nesha) use the Clinical Activity/Coordination Category, select the protocol and choose only between Protocol Related or Subject Related as tasks.

Category	Task(s)	User/Owner	Protocol
Administration	Meeting	ALL STAFF	Effort Tracking ONLY
Administration	Training/Professional Development	ALL STAFF	Effort Tracking ONLY
Administration	Other Activities	ALL STAFF	Effort Tracking ONLY
Time-Off	Time-Off	ALL STAFF	Effort Tracking ONLY
Clinical Activity/Coordination	Protocol Related	CRCs/CRAs	Select Protocol
Clinical Activity/Coordination	Subject Related	CRCs/CRAs	Select Protocol
Central Vendor Activities	Labs	Lab (Mike)	Select Protocol
Central Vendor Activities	Scans	Lab (Mike)	Select Protocol
Central Vendor Activities	Pathology	Lab (Mike)	Select Protocol
Central Vendor Activities	EKGs	Lab (Mike)	Select Protocol

Category	Task(s)	User/Owner	Protocol
Regulatory	Protocol Amendments	Regulatory	Select Protocol
Regulatory	Continuing Review	Regulatory	Select Protocol
Regulatory	Regulatory Document Preparation	Regulatory	Select Protocol
Regulatory	Initial Submission	Regulatory	Select Protocol
Regulatory	OSRs	Regulatory	Select Protocol
Regulatory	Protocol OnCore entry	Regulatory	Select Protocol
Regulatory	Other Regulatory	Regulatory	Select Protocol
Regulatory	IRB Approval Documentation	Regulatory	Select Protocol
Regulatory	Manager Review	Regulatory	Select Protocol
Regulatory	Reportable Event	Regulatory	Select Protocol
Regulatory	Credentialing	Regulatory	Select Protocol
Regulatory	Safety Submissions/Approvals	Regulatory	Select Protocol
Regulatory	OCRICC	Regulatory	Select Protocol
Internal Quality Assurance	QA Review	QA (Becca)	Select Protocol
Budgeting	Initial Protocol Review (incl. Medicare analysis)	Finance (Wendy/Chelsea)	Select Protocol
Budgeting	Internal Review Meeting	Finance (Wendy/Chelsea)	Select Protocol
Budgeting	Negotiations	Finance (Wendy/Chelsea)	Select Protocol
Budgeting	Amendments	Finance (Wendy/Chelsea)	Select Protocol
Budgeting	Budget construction	Finance (Wendy/Chelsea)	Select Protocol
Budgeting	Billing Forms Management	Finance (Wendy/Chelsea)	Select Protocol
Invoicing/Payments	Patient Billing	Finance (Wendy/Chelsea)	Select Protocol
Invoicing/Payments	Generating Invoices	Finance (Wendy/Chelsea)	Select Protocol
Invoicing/Payments	Reconciling Payments	Finance (Wendy/Chelsea)	Select Protocol
Invoicing/Payments	System Approvals	Finance (Wendy/Chelsea)	Select Protocol
Invoicing/Payments	Collections	Finance (Wendy/Chelsea)	Select Protocol
Invoicing/Payments	Vendor Payments	Finance (Wendy/Chelsea)	Select Protocol
Invoicing/Payments	Affiliate Payments	Finance (Wendy/Chelsea)	Select Protocol
Invoicing/Payments	Account Close-out	Finance (Wendy/Chelsea)	Select Protocol
Invoicing/Payments	Billing Compliance Review	Finance (Wendy/Chelsea)	Select Protocol
Affiliate Network	Affiliate communications	Multi-Site (Kathleen)	Select Protocol
Affiliate Network	Site documentation	Multi-Site (Kathleen)	Select Protocol
Affiliate Network	Master Agreements	Multi-Site (Kathleen)	Select Protocol