

## Quick Start Reference

Requesting OnCore Roles (BWH)

**Requesting Training and Access:** To request OnCore training and access, please submit a ServiceNow Ticket ([Click here for the HelpDesk page](#)). Tickets will receive a response within 1 business day and the OnCore team will assign the required eLearning in HealthStream. Access to OnCore will be granted after successful completion of the assigned training. (See Appendix A.) Please refer to the *DF/HCC OnCore Access Request Form for BWH Users* for additional guidance.

The ticket must include the following information:

1. Application: Oncore-dfci
2. Issue: BWH New User Training and Access
3. Name and Partners ID of person entering request
4. Name of Individual Who Needs Access
5. Partners ID of Individual Who Needs Access
6. Requested OnCore Institution(s): BWH, etc.
7. Requested Management Group(s)
8. Requested OnCore Role(s)
9. Statement confirming successful BWH Institutional Training

**OnCore Institutions:** Each user profile contains user-specific information. One piece of information is the user's institution; this should reflect the user's primary employer (BWH). Having an institution identified at the staff profile level allows the user to register subjects to that specific site. If the user is responsible for registering subjects at outside sites that are also listed on the protocol, those institutions should be listed as affiliated institutions.

**OnCore Management Groups:** Management Groups (MGs) align with DF/HCC disease programs / site-programs and provide access to all protocols within the specified group. Please reference Appendix B to indicate all relevant Management Group(s) for the user's staff profile. For Coordinator and Enhanced Coordinator roles please check the Management Group(s) of the studies to which the staff will require access.

**OnCore Roles:** Roles limit users' access to not only the appropriate protocols and subjects, but also specific OnCore functionality. In some cases, OnCore roles align with operational roles (e.g. Manager or Coordinator). There are three primary roles in OnCore for BWH study team staff.

1. Coordinator (OnCore code: Coord+)
2. BWH Enhanced Coordinator (OnCore code: BWH Coord+ Enh)
3. Research Manager (OnCore code: RM)

**\*Coordinator Role:** The OnCore functions for this role include:

- View PHI information
- Create a new subject record, edit demographics
- Enter consent and eligibility statuses
- Enter on-study and on-treatment dates
- View protocol and subject calendars
- Change calendar versions for a given subject
- View SRC and IRB review tab
- View reports

**\*This role is able to access only protocols to which they are assigned (i.e. listed on the staff tab)**

**\*BWH Enhanced Coordinator Role:** The OnCore functions for this role include those of the Coordinator, plus the following:

- Access and set notifications including subject status rules
- Update CC Total Accrual Goal (Upper)
- Update protocol staff tab and staff information (must match Delegation of Authority Log)
- Access to a broader range of reports

**\*This role is able to access only protocols to which they are assigned (i.e. listed on the staff tab)**

**\*Research Manager Role:** The OnCore functions for this role are the same as those for the BWH Enhanced Coordinator Role. The difference is in the protocols that can be accessed.

**\*This role is able to access all protocols within their listed management group.**

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DF/HCC

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**Additional roles in OnCore that may be applicable to BWH. Please enter a ServiceNow ticket for guidance.**

**View Access Role:** The OnCore functions for this role include:

- View PHI information
- View protocols
- View subject demographics
- View consent, eligibility and treatment information

*\*This role is able to access all protocols within their listed management group*

**CTO Role:** This is an administrative role with broad access. The OnCore functions for this role include:

- View PHI information
- Search and update staff contact information
- CRA, DSMC, Financials, PC, PI, Subject and Team Consoles
- View protocol specifications
- Protocol and subject search
- Broader access to reports
- View SRC and IRB review tab
- Subject calendar information

**CTO View Role:** The OnCore functions for this role include:

- View PHI information
- PC, Subject and Team Consoles
- Protocol and subject search
- View SRC and IRB review tab
- Data management reports

**Pharmacy View Only Role:** The OnCore functions for this role include:

- PC, Subject, CRA Consoles
- Protocol and subject search
- View SRC and IRB review tab
- Planned visit reports

*If you have any questions, please enter a ServiceNow Ticket.*

**APPENDIX A: Training requirements**

<b>HealthStream eLearning</b>	<b>Description</b>	<b>Estimated duration</b>
PHE OnCore DFHCC View Only	<ul style="list-style-type: none"> <li>• Minimum required training for OnCore access</li> <li>• Required for all “view only” roles</li> <li>• Pre-requisite for all other OnCore training</li> </ul>	36 min
PHE OnCore DFHCC Subject Enrollment	<ul style="list-style-type: none"> <li>• Required for Coordinator, BWH Enhanced Coordinator and Research Manager roles</li> <li>• Requirement for being granted any OnCore role that allows an individual to register subjects in OnCore</li> </ul>	1 hr 6 min
PHE OnCore DFHCC External Site Subjects Registration	<ul style="list-style-type: none"> <li>• Must complete OnCore Subject Enrollment Training prior to OnCore External Site Subject Registration</li> <li>• Required for Coordinator, BWH Enhanced Coordinator, and Research Manager roles on studies that register familial subjects, external site subjects, or non-patient subjects to protocols in OnCore.</li> </ul>	10 min
PHE OnCore 200 DFHCC - Research Manager and Regulatory Coordinator	<ul style="list-style-type: none"> <li>• Required for BWH Enhanced Coordinator and Research Manager roles</li> <li>• Requirement for being granted access to update staff tab in OnCore</li> </ul>	42 min

For successful completion of training, the minimum test score is 75%.

While there may be some differences in role assignments between study teams, the following represents a typical role delineation. Please consult with your CTO if you have questions regarding appropriate assignments.

<b>OnCore Role</b>	<b>Role on study team and/or job title</b>
Coordinator (Coord+)	CRC, Study Coordinator, Lead Study Coordinator
Enhanced Coordinator (BWH Coord+ Enh)	CRC, Study Coordinator, Lead Study Coordinator (if there is no Research Manager)
Research Manager (RM)	Research Manager

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DF/HCC

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### APPENDIX B: OnCore Institution Specific Management Groups

DFCI/BWH Adult Non-Malignant Hematology	DFCI/BWH Pop Sci: Cancer Genetics
DFCI/BWH Adult Other	DFCI/BWH Pop Sci: Cantor Center
DFCI/BWH Adult Sarcoma and Bone Oncology	DFCI/BWH Pop Sci: Community Based Research
DFCI/BWH Breast Oncology	DFCI/BWH Pop Sci: Outcomes Research
DFCI/BWH Center for Cancer Precision Medicine	DFCI/BWH Population Sciences
DFCI/BWH Cutaneous Oncology	DFCI/BWH Prostate
DFCI/BWH Gastrointestinal Oncology	DFCI/BWH Psychosocial Oncology and Palliative Care
DFCI/BWH Genitourinary Oncology (Not Kidney/Not Prostate)	DFCI/BWH Radiation Oncology
DFCI/BWH Gynecologic Oncology	DFCI/BWH Study Team Bill Q Review
DFCI/BWH Head and Neck Oncology	DFCI/BWH Thoracic Oncology
DFCI/BWH Immuno-Oncology	DFCI/BWH Transplant
DFCI/BWH Kidney	DFCI/BWH Treatment Plan (BMT/Non-Research)
DFCI/BWH Leukemia	DFCI/BWH Treatment Plan (Non-BMT/Non-Research)
DFCI/BWH Lymphoma	Non-DF/HCC Other Discipline
DFCI/BWH Melanoma	Non-DF/HCC Program (Trials NOT registering subjects)
DFCI/BWH Multiple Myeloma	OTHER Registering Site
DFCI/BWH Neuro-Oncology	
DFCI/BWH Phase I	

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