OnCore System Guideline

Task Lists

Prepared for: OnCore Version 2023R3.4

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Overview

This document was prepared to guide clinical teams in the many functions of Task Lists in OnCore. In general, this will help guide users with assigning, editing, and the many benefits of using Task Lists.

Assigning Task Lists

- Navigate to the protocol in the PC Console > Status Tab > Task Lists
- Users will select 'Copy Template' in the right upper corner of this page

- o This will open a pop-up with all available templates to copy over
- o Use the checkboxes to copy the templates to the protocol and select 'Save'

Edit a Task List

Task lists have been created to fit the current workflows. The expectation is that task lists will not need to be edited before the "Release" status is reached. Some changes to a task list after the release is as follows:

- Add additional tasks to the task list
- Delete tasks from the task list

- Attach communication and documents to the task list
- Assign owners and target dates to a task list
- Mark a task as complete (with a date) or as NA

Release a Task List

- Once all edits are complete, update the status to "Released."
  - Template > update status > move to complete > update status > move to released > close
- The only edits available after releasing a task list:
  - Add additional tasks to the task list
  - Delete tasks from the task list
  - Attach communication and documents to the task list
  - Assign owners and target dates to a task list
  - Mark a task as complete (with a date) or as NA

Task List Widgets

- Once a task list is released to a protocol, the tasks can be viewed in the widgets on your home page.
- Tasks will appear in one of the widgets, but not both widgets at the same time.
- There are no further edits required for the widgets to view task list items.
- If you do not see a task in your upcoming or active tasks widgets, make sure at least one of your assigned roles is applicable to that task & check the role for the task owner.

Helpful Hints

- Users can attach/share documents across the team in task lists.
- Users can add comments for specific items.
- Task lists are commonly used for startup activities but can also be used for amendments, audit prep, and study close out.
- When assigning tasks, assign the task to a role rather than a specific user. This will add the task to every user's widget with those role permissions.
- Should have a task list "manager", recommended role is the Primary Coordinator
- Task list template builders are 'high level' users (Jennifer Holmes, Darcie Findley, OnCore Support)