



The
UNIVERSITY
of **VERMONT**



OnCore™

OnCore System Guideline

Task Lists

Prepared for: OnCore Version 2023R3.4

Revision Number: 2

Revision Date: June 4th, 2024

Overview	1
Assigning Task Lists.....	2
Edit a Task List	2
Release a Task List.....	3
Task List Widgets	3
Helpful Hints	3

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

The screenshot shows the PC Console interface for protocol PILOT-1. The 'Task Lists' tab is active. In the 'Task List Templates' section, there is a table with columns for Workflow Order, Type, Name, Comments, and Status. Below this table, a 'Copy Templates' button is circled in red. The 'Task Lists' section below also shows a table with columns for Workflow Order, Name, Status, Previous Task, Completed Date, Current Task, and Target Date.

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

The 'Select Task List Templates' pop-up window displays a table of available templates. The table has the following data:

Workflow Order	Type	Name	Copy
1000	Participating Institution	Protocol Institution	<input type="checkbox"/>
1	Protocol	Legal/Financial (OCTR) 2 - Medicine	<input type="checkbox"/>
11	Protocol	IRB	<input type="checkbox"/>
22	Protocol	ClinicalTrials.gov	<input type="checkbox"/>
30	Protocol	Study Closure Checklist (Medicine)	<input type="checkbox"/>

At the bottom of the pop-up, there are 'Save' and 'Cancel' buttons.

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)