THE UNIVERSITY OF ARIZONA HEALTH SCIENCES
Research Administration
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Regulatory Work Practice

OnCore – Creating and Updating Staff

Purpose: OnCore is a Clinical Trial Management System (CTMS) from Advarra and gives research teams a single, comprehensive system for managing a trial throughout its life cycle. University of Arizona Health Sciences (UAHS) uses OnCore for a variety of purposes, including managing all clinical trials conducted within UAHS, housing current and approved study documents, housing study calendars and documenting when patient visits have occurred, housing electronic case report forms (eCRF's) for investigator initiated trials (IIT's), creating and running reports, reporting data directly to the National Cancer Institute (NCI), and tracking staff effort on trials.

The purpose of this work practice document is to delineate the process for how to enter new staff members, update staff information, and enter staff credentials into OnCore.

Scope: This applies to regulatory staff.

Tools:

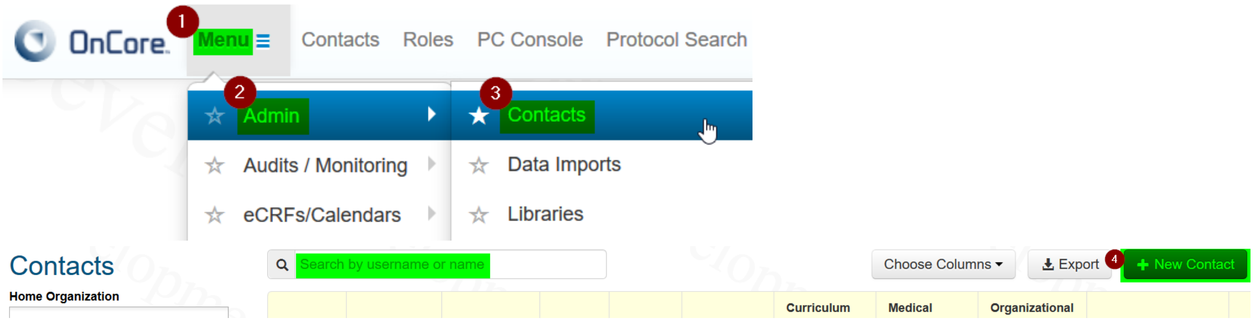
- Learning Portal: https://oncore-docs.advarra.com/index.php
  In addition, you can log into OnCore and from your profile drop down, select Help → Learning Portal

Process / Steps:

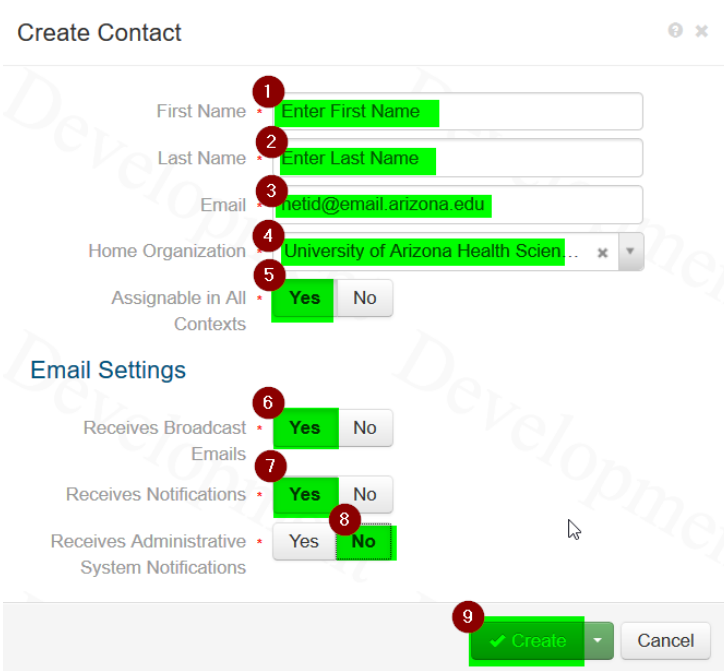
Log into OnCore: https://login.advarracloud.com/

Creating New Staff Records

1) Check to see if the new staff member exists in OnCore. They may have worked for a different department previously. Navigate to Admin ► Contacts and enter their name in the search bar. It is recommended to also search for alternative or previous names the individual may have used. If they don't exist, click on the **New Contact** button.



2) In the Dialog box, enter the appropriate information

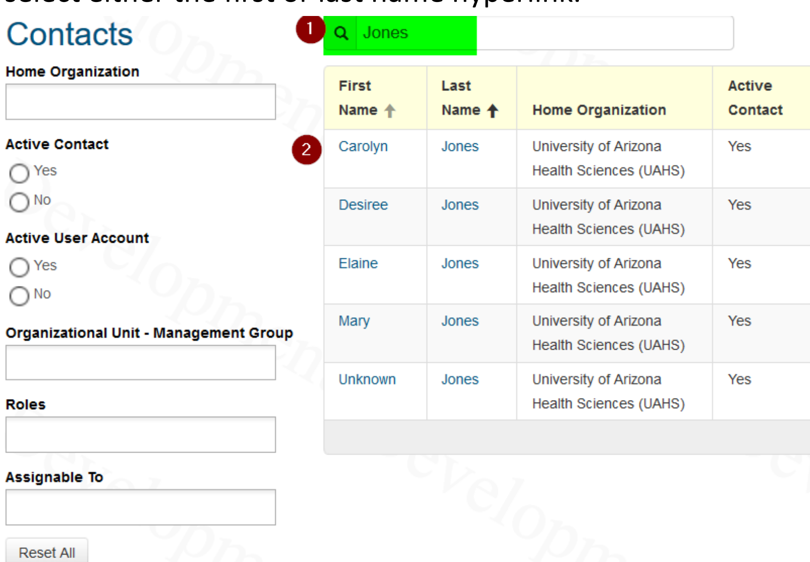


a) First Name – enter staff person's first name
b) Last Name – enter staff person's last name
c) Email – enter staff person's email address
    i) For University of Arizona (UA) employees, use the formal UA email address which includes their NetID (i.e. netid@email.arizona.edu)
    ii) For Banner employees, use their Banner email unless they have a UA email or are considered DCC (Designated College Colleague), then use the UA email.
a) Home Organization – Choose University of Arizona Health Sciences (UAHS) unless they are Banner employees, then choose Banner

b) Assignable in All Contexts – Click **Yes**
c) Receives Broadcast Emails – Click **Yes**
d) Receives Notifications – Click **Yes**
e) Receives Administrative System Notifications – Click **No**
f) Click **Create** button

Updating Staff Records

1) Access the staff record.
   a) New staff: Once you click **Create** on a new staff record**,** you will be redirected to the staff member's contact record.
   1. Existing staff: Navigate to Admin ► Contacts. Enter staff name in the search bar and select either the first or last name hyperlink.



   b) From the menu on the left, click on **Details** and then the **Edit** button to update information as needed:

2) Under Details:

a) Active Contact
   i) Defaults to **Yes** when creating a new record. Can be re-set to **Yes** if a former employee is re-hired.
   ii) Click **No** if they are no longer at UA.

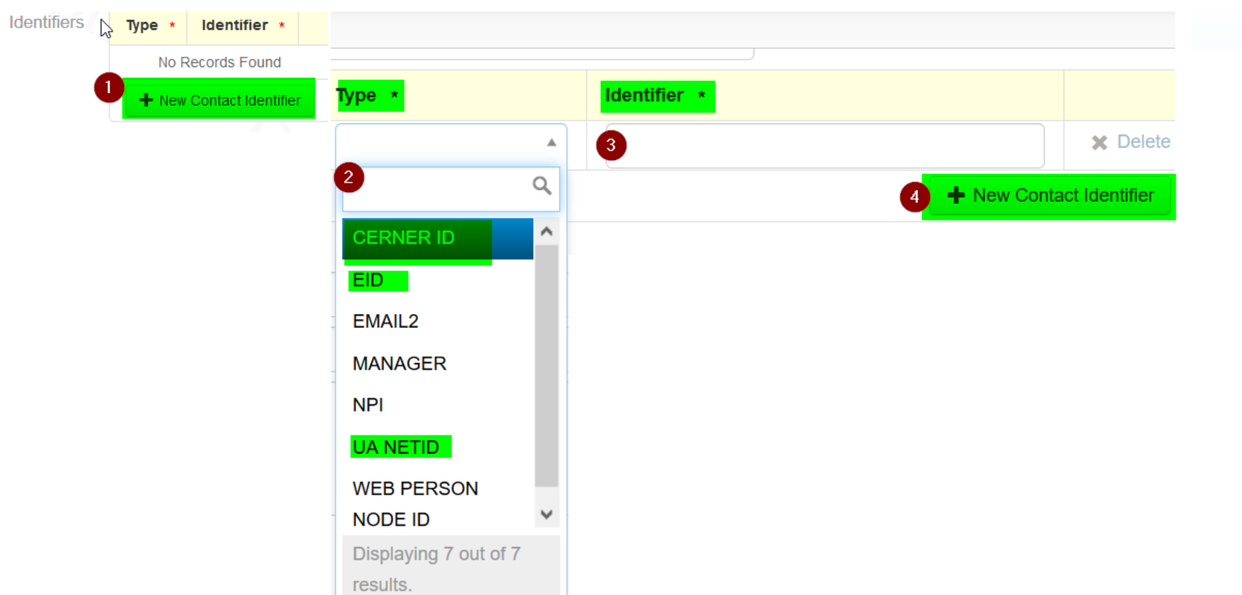
b) First, Middle, Last Names – enter/revise as needed

c) E-mail – Only one email can be entered. If second one is needed, enter it under identifiers.

d) Title – enter job title, or as listed on CV (ex. "Associate Professor of Medicine"; "Research Specialist – Regulatory")

e) Credentials – list known credentials or credentials on CV, otherwise leave blank
   i) Examples: MD, PhD, RN, MS, ACNP-BC, etc.

f) Identifiers – multiple identifiers can be entered in. Click on New Contact Identifier and enter in information.



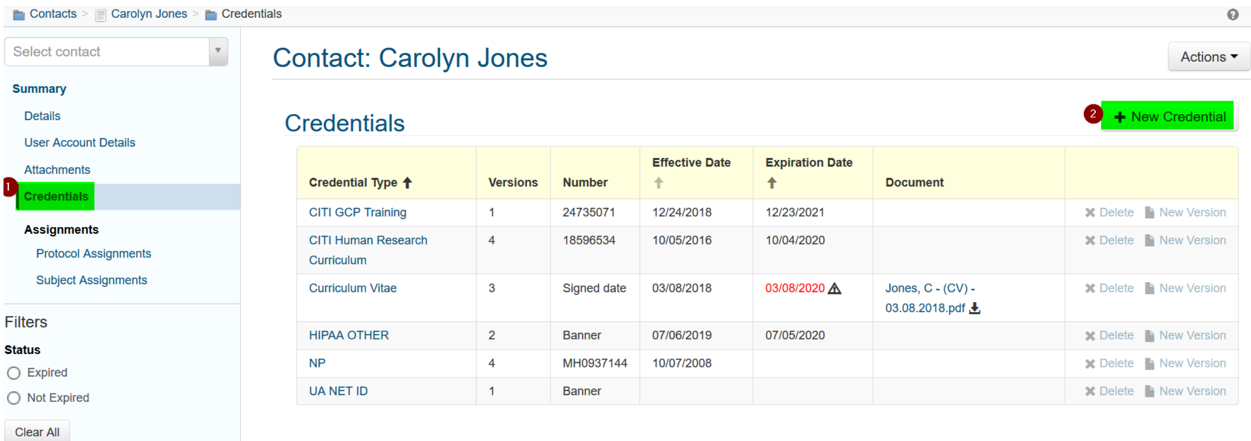
   i) CERNER ID -- used only for Cerner Integration. If a person needs to be associated with a protocol in Cerner, enter in value. **This is required for PIs.**

3) Enter additional information in the Details tab as desired.

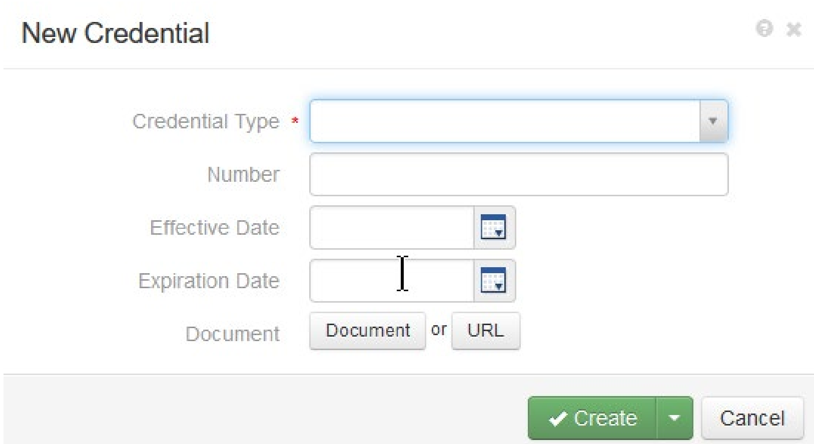
4) Click **SAVE** at the bottom right before navigating to another tab.

Creating and Updating Staff Certificates/Credentials

1) Entering staff certificates/credentials into OnCore is optional. Enter or update a certificate/credential by selecting Credentials from the menu on the left side.
2) To add a credential, click on New Credential. You may have to scroll over to the far right to see the [+New Credential] button.



a) A dialog box will appear. Complete the fields as applicable.



i) Credential Type – Select the appropriate credential or certificate to be added.
ii) Number – enter the number associated with the credential, if applicable.
iii) Effective Date – the start date that the credential is effective, if applicable
iv) Expiration Date – the end date that the credential is effective, if applicable.

v) NOTE: You must enter information into at least one of these fields: Number, Effective Date, or Expiration Date

vi) Use the [Document] button to upload the document or the [URL] button to add a publicly available URL (e.g. for a CITI certificate)

b) Then click Create.

3) To update a credential, click on New Version on the right side of the credential type.

Credential Type	Versions	Number	Effective Date	Expiration Date	Document	
CITI GCP Training	1	24735071	12/24/2018	12/23/2021		Delete New Version

4) To delete a credential, click on Delete on the right side of the credential type.

Credential Type	Versions	Number	Effective Date	Expiration Date	Document	
CITI GCP Training	1	24735071	12/24/2018	12/23/2021		Delete New Version