

Task List Work Flow

1. **Site** completes Protocol Registration Form – Study Start-Up or Full, indicating which task lists are appropriate for this study.

The screenshot shows a web form for protocol registration. The 'Task List Management' section is highlighted. It includes a heading 'Task List Management' and a sub-heading 'Select the tasks associated with study start-up for this protocol. IRB is a mandatory task list.' Below this, there is a section 'Check all that apply *' with a grid of checkboxes for various task lists: Feasibility Questionnaire, Sponsor Visits, Contract, Pharmacy, Biosafety**, IRB (checked), PRMC Review, Budget, Hospital Services, and Radiation Safety***.

2. **OnCore Admin** enters protocol information, and downloads specified task lists from the Library.

The screenshot shows the OnCore Admin interface. A modal window titled 'Select Task List Templates' is open, displaying a table of available task list templates. The table has columns for Workflow Order, Type, Name, and Copy. The templates listed include CDA, Feasibility Questionnaire, Sponsor Visits, Contract, Budget, Pharmacy, Hospital Services, Biosafety, Radiation Safety, and IRB. The IRB template is checked. The background shows a table of task list templates with columns for Workflow Order, Type, Name, Status, and Unrelease/Delete links.

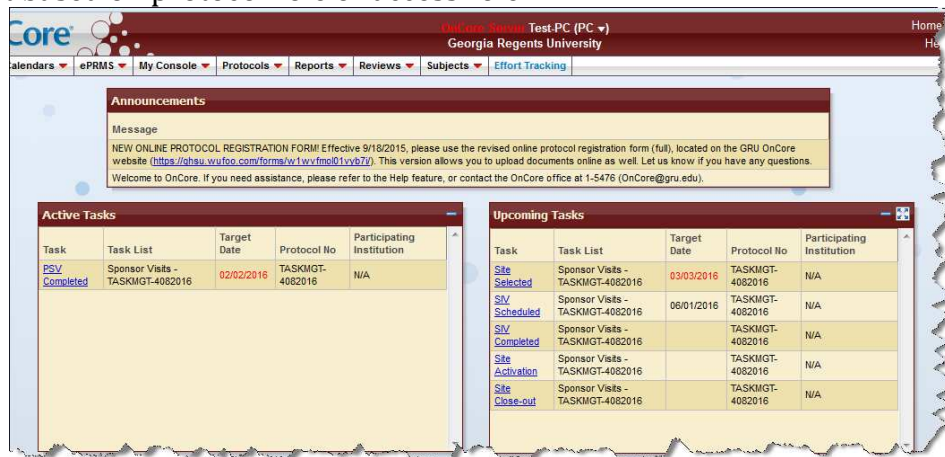
3. **Protocol Coordinator** reviews/edits the task list, changes the status to Complete, then to Released.

The screenshot shows the details for the task list 'Hospital Services - TASKMGT-4082016'. The level is 'Protocol (TASKMGT-4082016)' and the status is 'New'. There are buttons for 'Update Status' and 'Edit Template Details'. Below this is a section for 'Additional Owners' with a table listing owners and their permission types. The table has columns for Owner, Permission Type, and Delete links. The owners listed are Admin (Update), Regulatory Coordinator (View), Financial Coordinator (View), Protocol Coordinator (View), and SA (View). Below the table is a 'Tasks' section with a table for task details, including columns for #, Task Name, Milestone, Owner, After, Duration, and Duration Unit.

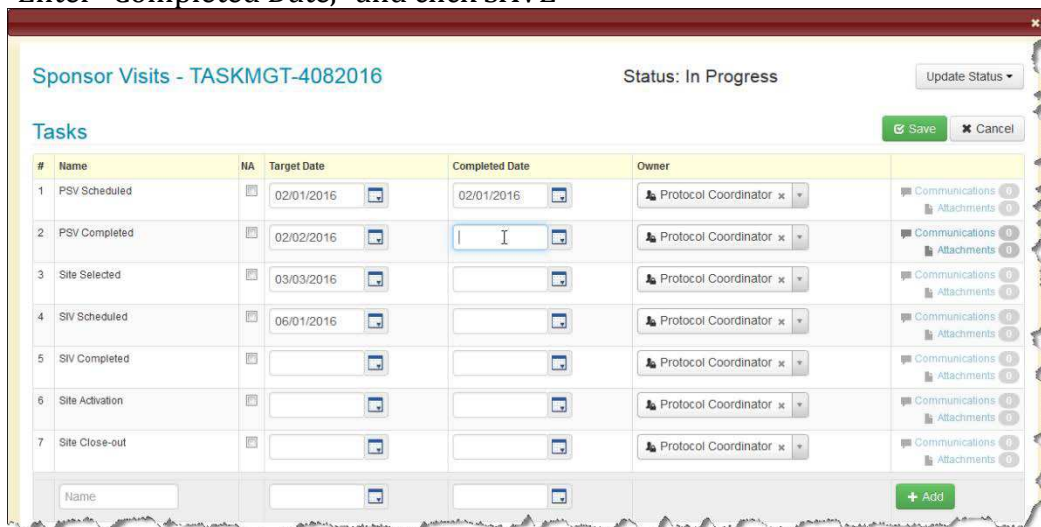
4. **Protocol Coordinator** enters the Target Date, clicks SAVE. Target dates are projected. The task list is now ready for the research staff's use.

Task List Work Flow

5. **Responsible Person/Staff Role** will see task on Active Tasks and Upcoming Tasks widget based on protocol role or access role.



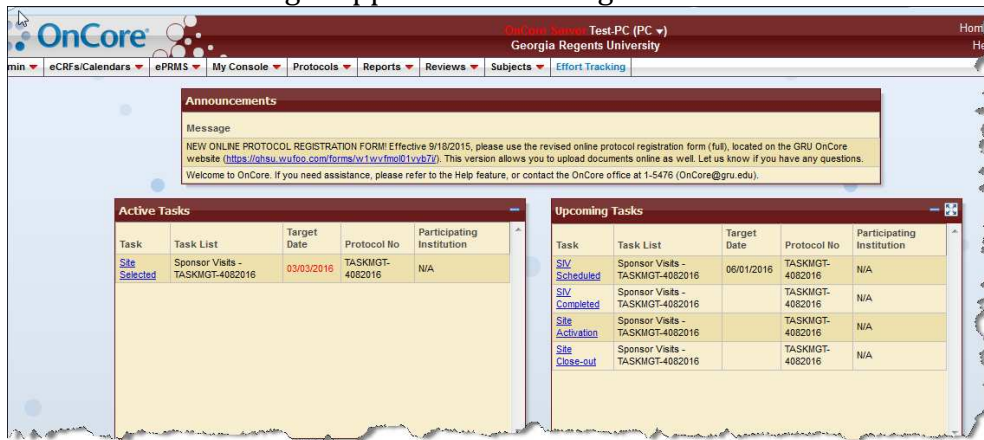
6. **Responsible Person/Staff Role**, click the task hyperlink from the home screen widget or go to Protocol > PC Console > Status > Task List tab
7. Enter "Completed Date," and click SAVE



8. Communications can also be entered, and/or specific task deleted if appropriate access.
9. Click "Close" button

Task List Work Flow

10. The task item no longer appears on the widget.



11. **Task Items and Task List complete.** All task items that have a **target date** MUST have a corresponding **completed date**. Otherwise the task is considered incomplete and will be displayed on reports as outstanding. Also, remember to change the task list status to “Complete” after completed dates have been entered. To change the task list status, open the task list, click **Update Status** button, and select > **Move to ‘Complete’ Status**, then click **Save** and **Close**.



TASK MANAGEMENT REPORTS

Navigate to Reports > Reports > Task Management. There are four reports, AU Task Tracking (customized), and three standard template reports, Task List Summary, Task and Outstanding Tasks. Each of the reports in the Task Management group can be scheduled to run on a daily, weekly, or monthly schedule; the resulting reports can be saved in either Excel, PDF, HTML, CSV, RTF, or DOCX formats and can be sent to email addresses specified in the Report Schedule page.

Task List Summary Report

The Task List Summary Report lists the current status of each task list for a selected protocol and all participating institutions. This report displays only those task lists that the user has permission to view. At the present time, only one Protocol can be selected.

Search Criteria

Report Criteria	
Task List Summary	
Protocol No.*	<input type="text" value="Type here to search"/>
<input type="button" value="Excel"/> <input type="button" value="Submit"/> <input type="button" value="Clear"/>	
* indicates required field	
Copyright© 2001-2015 Forte Research Systems. All rights reserved.	

Task List Work Flow

Report Results

Task List Summary	
Protocol No: 12-CWA-TEST	
Protocol Task List	Status
Contracts - 12-CWA-TEST - 15308	Complete
Budgets - 12-CWA-TEST - 15307	Complete
IRB - 12-CWA-TEST - 15310	Complete
PRMC - 12-CWA-TEST - 15311	Complete
GCRC - 12-CWA-TEST - 15309	Complete
Non-Oncology Budget - 12-CWA-TEST - 16206	Complete
Summary - 12-CWA-TEST - 16207	Complete
Participating Institution	Protocol Institution - 12-CWA-TEST
Outstanding Research Center	Complete

Protocol Section

Participating Institution Section

Task List Summary - Management Group Report

This report provides information on protocols associated with a particular management group, including the next task and last completed task. At the present time, only one Management Group can be selected at a time.

Search Criteria

Report Criteria	
Task List Summary - Management Group	
Management Group*	<input type="text" value="Type here to search"/>
Status	<input type="text" value="Type here to search"/>
<input type="button" value="PDF"/> <input type="button" value="Submit"/> <input type="button" value="Clear"/>	
* indicates required field	
Copyright© 2001-2015 Forte Research Systems. All rights reserved.	

Report Results

Task List Summary - By Management Group									
Management Group: Cardiology					Status: Pending				
Protocol No.	Protocol Status	PI	Sponsor	Short Title	Task List Name	Last Task Completed	Completed Date	Next Task	Target Date
BMT99405	IRB INITIAL APPROVAL	Rivera, Jessica		QOL & Relationships after BMT	Budgets - BMT99405 - 6923				
BMT99405	IRB INITIAL APPROVAL	Rivera, Jessica		QOL & Relationships after BMT	IRB - BMT99405 - 8072				
BMT99405	IRB INITIAL APPROVAL	Rivera, Jessica		QOL & Relationships after BMT	PRMC - BMT99405 - 9221				

Task List Work Flow

Tasks Report

This flexible report provides multiple ways to view the tasks to which a user has access, including by a target date range, by Completed or NA status, by completed date range, by staff name or role, and by protocol or institution. Tasks will display that are assigned to the user directly or indirectly by staff role.

NOTE: If no Target or Completed dates are specified, all tasks appear in the report.

Staff Name

Limits the tasks to those that a certain user can complete; either tasks that are assigned to a user directly, or indirectly through the task being owned by a staff role that is assigned to the user. *Because certain tasks have designated responsible users, this is a good search filter for viewing CDA, for example. When Julie Kelley's name is entered, all tasks associated with CDAs will be displayed.*

Staff Role

Limits the tasks to those that are associated with a certain protocol staff role. Note: This field can be used in conjunction with the Staff Name field to see all the tasks a certain user has as part of a certain staff role. *Because certain tasks have been assigned to protocol staff roles, this is a good search filter for viewing staff role tasks, for example Financial Coordinator. When Financial Coordinator is selected as a "Staff Role," all tasks associated with this role will be displayed.*

Report Results

Tasks									
Target (From):		Target (Thru):		Completed:		Completed (From):		Completed (Thru):	
Protocol No.:		Staff Name:		NA:		Staff Role:		Institution:	
Task List	Task Name	Owner Type	Owner Name	Target Date	Days Overdue	Completed Date	NA	Protocol No.	Institution
JSM Global Institution List - MKK08	9	User	Wells, Timothy	01/01/2013	0	01/01/2013	N	MKK08	HFTC Institution
JSM Global Institution List - MKK08	4	Role	YCCI Contact	01/01/2013	901		N	MKK08	HFTC Institution

Task List Work Flow

Overdue tasks appear in red. The date that the report was run is shown in the footer.

Outstanding Tasks Report

This report displays incomplete and overdue tasks. You can use this report to identify and follow up on these tasks as needed.

Search Criteria

Report Criteria

Outstanding Tasks

Target Date (From)

Target Date (Thru)

Protocol No.

Staff Name

Staff Role

Institution

* indicates required field

Copyright© 2001-2015 Forte Research Systems. All rights reserved.

NOTE: If no filters are specified, all outstanding tasks appear in the report.

Report Results

Outstanding Tasks							
Target (From):		Target (Thru):		Protocol No.:			
Staff Name:		Staff Role:		Institution:			
Task	Task List	Owner Type	Owner Name	Target Date	Days Overdue	Protocol No	Institution
Department head receives draft contract	Pharmacy Start-Up - EPI2015-05	Role	Document Specialist	04/18/2015	67	EPI2015-05	
Baseline regulatory documents	Protocol Institution - TASK-001	User	Rebhorn, Abby	06/15/2015	9	TASK-001	Eau Claire
Submit disease group form H3-01	PRMC - F0763	User	Rebhorn, Abby	06/21/2015	3	F0763	
Site Initiation Visit complete	Protocol Institution - TASK-001	User	Rebhorn, Abby	06/21/2015	3	TASK-001	Swedish American
Radiation Safety	Protocol Institution - TASK-001	User	Rebhorn, Abby	07/04/2015	0	TASK-001	Eau Claire
Record staff assignments from CRO	Protocol Start-Up Tasks - Cardiology - TASK-001	Role	Protocol Coordinator	07/08/2015	0	TASK-001	
Upload IRB-approved consents and sponsor documents	Protocol Start-Up Tasks - Cardiology - TASK-001	User	Rebhorn, Abby	07/15/2015	0	TASK-001	
Upload notes from SRC meeting	PRMC - F0763	User	Rebhorn, Abby	07/28/2015	0	F0763	