

OnCore Training Suite

This is a catalog of all current tipsheets for OnCore – UCLA’s Clinical Research Management System.

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Basic	4564	How to Access and Log into OnCore
	4308	Tips for Using OnCore Successfully
	4315	Research Training Supplement - Crosswalk and IRB Questions
	4587	OnCore Notifications Reference Guide
	5447	How to Personalize Your Favorites Bar
	4316	How to Customize Your Home Widgets in OnCore
	5023	How to Utilize the Department View Access (DEPV) Access Role in OnCore
	4656	How to Confirm the Protocol Department in webIRB and OnCore
	5486	OnCore Version 16.0 Changes and Features
	Documents	4313
6613		How to Access and Upload Documents in OnCore
5025		How to Manage Core Documents in OnCore (Hem-Onc Studies Only)
5760		How to Manage Core Documents in OnCore (non-Hem-Onc studies)
4765		How to Expire Old Versions of Protocol Documents and Upload New Versions
Financials	4830	How to Access Financial Documents in OnCore & Budget Notifications
	5122	How to Create Invoices and Document Receipts in OnCore
	4537	How to Run the Subject Visits Variations Report
	4772	Fund Managers (non-Hem-Onc) Validation Checklist Prior to Performing the Study Team Signoff
	5782	Fund Managers (HemOnc) Validation Checklist Prior to Performing the Study Team Signoff
	6798	How to View Subject Data in the CRA and Subject Console as a Fund Manager
Protocol Management	7109	How to Use the Budget Negotiation Task List
	5707	How to Enter Protocol Short Title in SRC No. Field
	6499	How to Temporarily Suspend Accrual for a Study
Protocol Statuses	4611	Protocol Statuses Grid
	5372	Protocol and Budget Statuses (Non-Hem/Onc)

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	5775	How to Abandon Studies in OnCore
Staff	4317	How to Manage Protocol and Subject Staff
	4843	How to Change Staff Associated to Multiple Protocols or Subjects via the Staff Change Tool
Study Activation	5708	How to Use the Comprehensive Ancillary Forms Engine (CAFE)
	5837	How to View Study Activation Task Lists
	4592	Study Start-Up Task List and Signoff for Study Activation
	5529	How to Create Your Protocol Short Title in OnCore
	5463	Fund Managers - Budget Out Checklist
	5736	How to Enter a Fund Accounting Unit (FAU) in OnCore
	5944	HemOnc Study Activation Workflow v6.3
	5945	How to Perform Fund Manager Tasks for Study Activation for HemOnc Studies
	5948	How to Perform Regulatory Coordinator Tasks for Study Activation for HemOnc Studies
	4770	How to Run the Protocol Startup Next Actions Report in OnCore
	4654	How to Run the Next Actions Report
Study Closure	4746	How to Close Study to Accrual
	4749	How to Use the Study Closure Task List
Subject Management	4702	How to Print a Consent Form in OnCore
	4471	How to Access the Signed Consent Form for Subjects in OnCore
	4497	How to Record a Subject ID Number in OnCore
	4586	How to Manage Pre-Screened Subjects in OnCore
	4536	How to Manage Subjects in OnCore
	4670	How to Manage Subjects on Confidential Studies
	5538	How to Access the Subject Visit Update Page and Select CPT(s) for Procedure Alternatives
	5429	How to Document and View Serious Adverse Events and Deviations in OnCore
	5374	How to Document and Track Subject Payments in OnCore
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Category	Doc ID	Clickable Link
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Oncology	5024	How to Use JCCC Reports in OnCore
	6381	How to Run the Study Activation Metrics (SAM) - Enterprise per Protocol Report
	6382	How to Run the Study Activation Metrics (SAM) - Enterprise (FLAT) Report
	6397	How to Run the HemOnc WorkQueue Report in OnCore
Training Resource	4618	RSCH100 Fundamentals Slides
	4561	RSCH100 Fundamentals Participant Guide
	4619	RSCH160 Financial Management Slides
	5349	RSCH160 Financial Management Participant Guide
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	4920	RSCH170 Reviewing Research Related Charges
	4620	RSCH210 Study Management Slides
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	4621	RSCH215 Non-Beacon Research Subject/Patient Management Slides
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	5496	RSCH216 Beacon Research Subject Patient Management Slides
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	4533	RSCH300 Investigator Participant Guide (E-Learning)
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