

Functionality	Description or OnCore Path
Protocol Administration	
Basic protocol setup	Protocols > PC Console > Main, Management, Staff, Sponsor, IND/IDE, and CT.GOV/CTRP tabs Protocols > PC Console > Treatment Protocols > PC Console > Institution
Protocol activation and status tracking	Protocols > PC Console > Status
Regulatory	Protocols > PC Console > Reviews
Scientific reviews	Protocols > PC Console > Reviews
IRB reviews	Protocols > PC Console > Reviews
DSMC, PRMS reviews	Protocols > PC Console > Reviews
UCH-RSS, CTO, RDRC, IBC, FDA, ORC reviews	Protocols > PC Console > Reviews > Other External Committee Actions
Eligibility Checklists	Protocols > PC Console > Eligibility
Documents/Info	Protocols > PC Console > Documents/Info
Documents Search	Protocols > Document Search
Subject Administration	
Pre-Screening	Subjects > Pre-Screening
Basic subject setup	Subjects > CRA Console > Demographics
Subject Status Tracking (Consenting, Eligibility, On Study, On Treatment, On Follow-Up)	Subjects > CRA Console > Consent Subjects > CRA Console > Eligibility Subjects > CRA Console > On Study Subjects > CRA Console > Treatment Subjects > CRA Console > Follow-Up
SAEs	Subjects > CRA Console > SAEs
Deviations	Subjects > CRA Console > Deviations
Documents/Info	Subjects > CRA Console > Documents/Info
Subject Search	Subjects > Subject Search
Calendars	
Protocol Calendars	eCRFs/Calendars > Specifications > Protocol Specifications
Subject Calendars	Subjects > CRA Console > Calendar
Procedures & Evaluations	eCRFs/Calendars > Specifications > Protocol Specifications > Calendar
Treatment & Follow-Up Schedules	eCRFs/Calendars > Specifications > Protocol Specifications > Treatment Visits
Visit Tolerances	eCRFs/Calendars > Specifications > Protocol Specifications > Calendar
Foot Notes	eCRFs/Calendars > Specifications > Protocol Specifications > Calendar
Visit Tracking	
Visit & procedures tracking	Subjects > CRA Console > Calendar
Additional visits & procedures	Subjects > CRA Console > Calendar
Financials - Pre-Award	
Study budgets	Financials > Financials Console > Parameters
Negotiated rates	Financials > Financials Console > Protocol Related Financials > Financials Console > Subject Related
SOC vs. Research cost indication	Financials > Financials Console > Protocol Related Financials > Financials Console > Subject Related
Coverage Analysis	Financials > Coverage Analysis Console
Enterprise Charge Master	Financials > Charge Master
Financials - Post-Award	
Payment milestones	Financials > Financials Console > Milestones
Automated invoice items	Financials > Financials Console > Invoicing Rules
Invoice generation	Financials > Financials Console > Invoiceable Items
Receivables tracking	Financials > Financials Console > Invoices Financials > Financials Console > Receipts
Visit Variations	Financials > Financials Console > Visit Variations
Study Data Management	
Data Monitoring	eCRFs/Calendars > DM Console
Discrepancy Management	eCRFs/Calendars > DM Console
Data Export	eCRFs/Calendars > DM Console