

## OnCore – Completing the Budget Task List

### Locating the Budget Task List

- All task lists are located in the PC Console (Protocols->PC Console->Status-> Task Lists)
- Click the 'Budget Task List' to open and view the steps
- Access to update or view the task list is as follows:

Protocol Level Role	Permission
Budget Specialist	Update
Finance Specialist	Update
Finance Manager	Update
Principal Investigator	View
Clinical Research Manager	View
Affiliate Clinical Research Manager	View
Affiliate Finance Specialist	View
Regulatory Coordinator	View

### Updating The Budget Task List

- The required tasks are B10 and B60. Please add the corresponding date to the 'Completed Date' field to satisfy this requirement. For step B60 please use the date the Sponsor approved the budget, not the date the contract was fully executed. Completion of these steps will be required prior to Open to Accrual for Industry-Initiated Industry-Sponsored Studies:

Budget Task List V1 - X16-2310

Status: New

Update Status ▾

#### Tasks

Save Cancel

#	Name	NA	Target Date	Completed Date	Owner	Communications	Attachments
1	B10: REQUIRED: Draft Budget Received from Sponsor	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	Owner	0	0
2	B20: Draft Budget approved by PI/Study Team and sent to Sponsor	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	Owner	0	0
3	B30: Sponsor responds to draft budget	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	Owner	0	0
4	B40: Budget in negotiation. Study Team response needed	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	Owner	0	0
5	B50: Budget in negotiation. Waiting for sponsor response	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	Owner	0	0
6	B60: REQUIRED: Budget Finalized	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	Owner	0	0



- The intermediate steps (B20-B50) may be used by the study team to track the status of the budget negotiations. Those roles with access to 'update' the task list may assign these tasks to an individual or protocol level role. Those tasks with a 'target date' but no 'completed date' will show as outstanding on the task management reports (Reports->Reports->Task Management).
  - For example. The following task list has step B30 as the next unfinished task:

**Budget Task List V1 - X16-2310**

Status: In Progress

Update Status ▾

**Tasks**

Save Cancel

#	Name	NA	Target Date	Completed Date	Owner	
1	B10: REQUIRED: Draft Budget Received from Sponsor	<input type="checkbox"/>	09/27/2018	09/28/2018	Finance Specialist	Communications 0 Attachments 0
2	B20: Draft Budget approved by PI/Study Team and sent to Sponsor	<input type="checkbox"/>	10/03/2018	10/04/2018	Finance Specialist	Communications 0 Attachments 0
3	B30: Sponsor responds to draft budget	<input type="checkbox"/>	10/05/2018		Finance Specialist	Communications 0 Attachments 0
4	B40: Budget in negotiation. Study Team response needed	<input type="checkbox"/>			Finance Specialist	Communications 0 Attachments 0
5	B50: Budget in negotiation. Waiting for sponsor response	<input type="checkbox"/>			Finance Specialist	Communications 0 Attachments 0
6	B60: REQUIRED: Budget Finalized	<input type="checkbox"/>	11/27/2018		Finance Manager	Communications 0 Attachments 0

- When the outstanding task report is run for this protocol we can see this listed as the next step:

Outstanding Tasks							
Target (From):		Target (Thru):		Protocol No.:		X16-2310	
Staff Name:		Staff Role:		Institution:			
Task	Task List	Owner Type	Owner Name	Target Date	Days Overdue	Protocol No.	Institution
B30: Sponsor responds to draft budget	Budget Task List V1 - X16-2310	Role	Finance Specialist	10/05/2018	53	X16-2310	
B60: REQUIRED: Budget Finalized	Budget Task List V1 - X16-2310	Role	Finance Manager	11/27/2018	0	X16-2310	

- The Task list reports can be run at the protocol, staff, management group, institution or date range level. These reports can be used to drive workflow and manage deadlines if desired.