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:

➢ 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).

    o For example. The following task list has step B30 as the next unfinished task:

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

➢ 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.