

OnCore Calendar Requests in iLab: Study Team

Effective October 1, 2020, the OnCore calendar request process will transition from Qualtrics to iLab. The Study Team personnel will enter calendar requests in iLab and the OnCore Admin/Office of Research will coordinate Test Builds and billing.

Roles: Study Team Member Submitting Request (Study Team)
OnCore Admin (OC Admin)
Grants & Contracts Office CDA Reviewer (GCO Admin)
Office of Research Billing Contact (OoR Admin)

NOTE: Personnel must be a member of the lab for which the request is for. A list of pre-identified labs may be developed as needed. For instance, Cancer Center personnel can submit requests through the “Cancer Center CTO (MCW) Lab.”

1. Study Team initiates a new OnCore Calendar build request in [iLab](#) using the **request service** button.

The screenshot shows the iLab interface for OnCore Calendar Requests. The header includes the Agilent CrossLab logo and 'iLab Operations Software'. A search bar and user profile for 'Ashleigh Sanchez' are visible. The main content area is titled 'OnCore Calendar Requests' and features the Medical College of Wisconsin logo. A yellow alert banner states: 'Alert! You're browsing this page in "Customer Test Mode"... Ready to [turn it off](#)'. Below the alert are navigation buttons: 'About Our Core', 'Request Services', 'View My Requests', and 'Contact Us'. A 'Calendar Requests' section is expanded, showing a 'Sort manually' button. At the bottom, the 'OnCore Calendar Request' section includes a description: 'Submit a Request Form with valid CDA (if applicable) and Protocol documents to have an OnCore Calendar built for your study.' A 'request service' button is highlighted with a red box. The footer of the page shows '3241.23 (Internal)'.

2. Study Team completes the OnCore Calendar Request Form:

- a. New requests must include **OnCore Protocol ID#**
- b. If available, include NCT Number
- c. Attach a copy of the protocol as a PDF and include the version date
- d. If the funder is For Profit, the GCO Admin needs to review a copy of the Confidentiality Agreement:
 - i. If you have a copy of the CDA, upload it at this point.
 - ii. If you do not have a copy of the CDA, you must explain the lack of CDA (this may delay your calendar build).

- e. If you would like to have any study coordinators notified when the test build has been completed, list their email addresses separated by semicolons:

- f. **Save the completed form.** You will note a calendar build fee has been added to your request and populated the total cost. Skip over the blue rows for “Protocol Share Allowed” and “TEST Calendar Approved.”

Please save your form! → save completed form save draft of form

⚠ After saving your form, please submit your request to the core.

▶ Sep 16 01:43 PM	OnCore Calendar Build Fee	Quantity: 1.0	Unit Price: \$241.23	Total: \$241.23	Billing Status: Not Ready To Bill	Work Status: Proposed	
	Protocol Share Allowed	description: Grants & Contracts has reviewed CDA and approved calendar build.				Not Started	
	TEST Calendar Approved	description: Started: Forte has completed the build of the TEST calendar. Finished: Study Team has approved final version of calendar.				Not Started	

- g. Under the Payment Information section, select the appropriate account to charge for the calendar request. Then **Submit Request to Core.**

NOTE: The account can be changed up to the date the invoice is fully processed.

Payment Information

Please enter the Project or General Ledger Account

% %

Project or General Ledger Account

100.0%

Select Project or General Ledger Account...
 Select Project or General Ledger Account...
2211412.1 - Milwaukee County (Warning: Expires on September 29, 2020)

total Allocated


+ Split Charge

enter additional payment information

submit request to core save draft request Cancel

- h. After submitting a new request, it will appear on the “View My Requests” tab in a status of “Waiting for Core to Begin” until the OC Admin begins reviewing it.

OnCore Calendar Requests



Alert!
You're browsing this page in "Customer Test Mode"... Ready to [turn it off](#)

[About Our Core](#) | [Request Services](#) | [View My Requests](#) | [Contact Us](#)

Reload Active Requests

▼ active requests

Searching within active requests: Results in this tab are restricted by Status ([show details](#))
Please use the filter panels in the left-hand menu to drill down to requests of interest. You can also save filters to custom tabs! [Click here for more details.](#)

Hide Filters

▼ Keywords

 Go

▶ Status

▶ Category

▶ Labels




▶ Assigned To

▶ Lab




Displaying 1 out of 1 result. (Page 1 of 1)

date	for	service id	status	cost
▶ Sep 16 (Sep 16 2020)	AshLeigh Sanchez Admin (MCW) Lab	OCCR-AS-34 OnCore Calendar R...	Waiting for Core to Begin	\$241.23 (\$241.23)
OnCore Protocol ID#: 888888			Begin	

3. Study Team can monitor the progress of a request(s) anytime on the “View My Requests” tab. Once the request has been started by the OC Admin, you will notice the request go into a status of “Processing.” Underneath, you will also see the status of the current milestone (for tracking work).
 - a. If you have submitted a request for a non-“For Profit” funder, skip to step 4.
 - b. If you have submitted a request for a “For Profit” funder, you will receive an Outlook notification sent from iLab that the milestone status has been updated to “Reviewing for Protocol Share – started”

▶ Sep 16 (Sep 16 2020)	AshLeigh Sanchez Admin (MCW) Lab	OCCR-AS-37 OnCore Calendar R...	Processing Reviewing for Protocol Share - started	\$241.23 (\$241.23)	  
OnCore Protocol ID#: 555555			Complete		





- c. The GCO Admin reviews the CDA to confirm it is acceptable to share the protocol with Forte.
- d. If it is not acceptable, the GCO Admin will communicate necessary changes via the comment feature. Toggle open the request and scroll down to the “Comments” section. Comments are logged on the request and also sent via Outlook as notifications from iLab:



▼ Sep 16 (Sep 16 2020)	AshLeigh Sanchez Admin (MCW) Lab	OCCR-AS-37 OnCore Calendar R...	Processing Reviewing for Protocol Share - started	\$241.23 (\$241.23)	  
OnCore Protocol ID#: 555555			Complete		

▶ Overview edit

▶ Payment Information update payment information

▼ Forms and Request Details (see bottom of list to add items to this request) ≡

View Form: OnCore Calendar Request Form Visible Completed    


Item	Description	Quantity	Unit Price	Total	Billing Status	Work Status
▶ Sep 16 02:50 PM (Internal)	OnCore Calendar Build Fee	1.0	\$241.23	\$241.23	Not Ready To	Proposed
	Reviewing for Protocol Share description: If the sponsor is for-profit, Grants & Contracts must review the CDA and approve the protocol share.				note: click to edit	Started
	Calendar Testing description: Started: Forte has completed the build of the TEST calendar. Finished: Study Team has approved final version of calendar.				note: click to edit	Not Started


[add service](#) [add charge](#) [add form](#) [add milestone](#) [sort manually](#)
 Build a quote, or add components to a new or running request using the 'add' links above.
[Generate PDF quote](#)

Comments add comment

Sep 16 '20
03:22 PM
AshLeigh Sanchez said
Dear Study Team,
The CDA is not current and needs to be updated before it can be accepted for documentation permitting protocol share with Forte. Please upload current version.
Thanks, April

Attachments & URLs add attachment add url

 [OCCR-AS- 37 _Sample_Protocol.pdf](#) AshLeigh Sanchez 2020 Sep 16 @14:51

 [OCCR-AS- 37 _Sample_CDA.pdf](#) AshLeigh Sanchez 2020 Sep 16 @14:51


- e. You can communicate updates back to GCO Admin via the Comment Feature. To upload an additional document or provide a link, use the “Attachments & URLs” section.


Comments add comment

Sep 16 '20
03:50 PM
AshLeigh Sanchez said
Updated verison has been attached. Thanks!

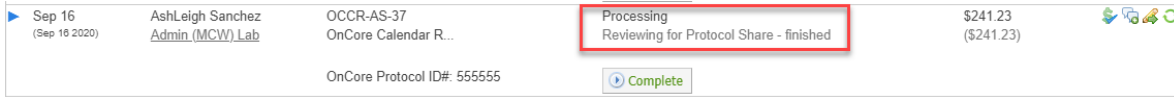
Sep 16 '20
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Attachments & URLs add attachment add url

 [OCCR-AS- 37 _Sample_Protocol.pdf](#) AshLeigh Sanchez 2020 Sep 16 @14:51

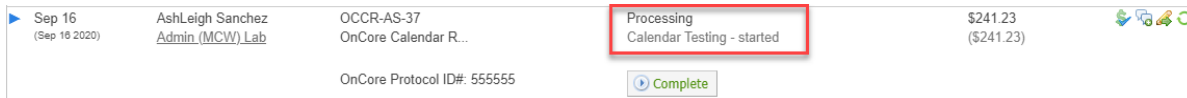
 [OCCR-AS- 37 _Sample_CDA.pdf](#) AshLeigh Sanchez 2020 Sep 16 @14:51

- f. If/when the GCO approves the documentation in the CDA permitting the sharing of the protocol with Forte, it will be noted in the comments section.
4. Study team will be notified via Outlook notification from iLab that the overall request is in a status of “Processing > Reviewing for Protocol Share – finished” if the request is for a non-“For Profit” sponsor OR once the GCO admin has confirmed protocol share is approved for a “For Profit” sponsor,

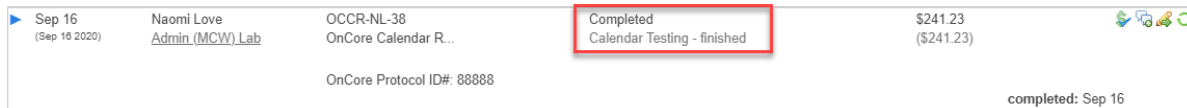


5. The OC Admin will submit the calendar build request to Forte.
6. Once the Test Calendar has been uploaded to OnCore by the vendor, the OC Admin will initiate the testing milestone. The overall request will be updated to a status of “Calendar Testing – started” and an Outlook notification will be sent to the study team from iLab.

NOTE: At this time, the charge for the calendar is “Ready to Bill” because the calendar has been received. Regardless of how long review and testing lasts, the charge will be invoiced on the next monthly billing event.



7. The Study Team should thoroughly review the Test Calendar in OnCore and submit any changes to the OC Admin (this can be done via regular Outlook email).
8. Once the Study Team has completed testing and confirmed the final calendar, the OC Admin will mark the request complete, which will auto-finish the “Calendar Testing” milestone and close the request.



9. The OoR Admin will process monthly billing events (or higher frequency) to capture all charges that were marked “Ready to Bill” (step 6) since the last billing event. Invoices can be accessed through the main navigation. For help with invoicing/billing, please contact iLab@mcw.edu.