Pre-Screening Console

OnCore supplies a way to track screening efforts for potential Subjects.

1. Select the Subjects → Pre-Screening menu link.

   Your initial page is a search screen. We will return to this shortly.

2. Click the New button to create a new pre-screening record.

   The top portion of the screen is where you can record Referral and Contact Information. The fields are straightforward, and only the Contact Date is required.

3. Select a Management Group.

4. Enter today’s date as the Contact Date.

5. In the Referral Channel field, select Newspaper.

   A new entry field will appear, allowing you to supply which Newspaper was used.

6. Select an item from Referral Details.

   The next section records Subject Characteristics. All data entry fields are optional.

7. Enter a Subject Identifier and select one or more Race checkboxes.

8. Click the Submit button.

   Once the potential subject has been evaluated, evaluation data can be entered in the bottom portion of the screen.

9. Select Yes for Subject Evaluated?

10. Select yourself as the Evaluator and record a Time Spent.

11. Select our training protocol number in the Protocol No. field.

12. Select Yes for Subject Consented?, then click elsewhere in the screen.

   When a Protocol No is entered and the patient is listed as having consented, the Add Subject to Protocol button appears.

13. Click the Add Subject to Protocol button.

   You are transferred to the New Subject Registration screen. On this page you can add a new subject to the protocol.
14. Return to the Pre-Screening Search page via the Subjects→ Pre-Screening menulink.

Now that you've seen the Pre-Screening entry page, the initial search page makes sense. It's a typical search page.

Here you may enter or select data in the various fields to narrow your search. Let’s see the pre-screening record you just entered.

Start typing your last name in the **Evaluated By** field, your name will display in the drop-down. Click on your name and then click the **Submit** button.

The Search Results screen displays the search criteria in the header, and the found records in a table below. The column headers in the table are hyperlinks – click them to sort the records by that column.

15. Click on the Pre-screening ID hyperlink. This will display the Pre-Screening Record. Click the **Update** button.

Additional fields allow you to indicate who did the evaluation and the time it took, if the patient is eligible. Once the patient goes On Study, the **Patient On Study** and **Record Completed** fields may be set to Yes. You may enter additional information in the **Subject Notes** section that will appear at the bottom of the page.

16. **Click Submit** to save the information, then click **Close**.