

OnCore User Matrix

Role	Permissions
Principal Investigator	Protocols
	<ul style="list-style-type: none"> • View protocol information and associated documents
	Subjects
	<ul style="list-style-type: none"> • View subject information
	Calendars
<ul style="list-style-type: none"> • View protocol calendars and subject calendars 	
Study Coordinator (Primary or Backup)	Other
	<ul style="list-style-type: none"> • Perform protocol/subject/document searches
	Subjects
	<ul style="list-style-type: none"> • Add new subjects to protocols • Update subjects protocol statuses • Record subject visit updates • Assign/update treatment arm • Update protocol • Enter deviations
	Protocols
<ul style="list-style-type: none"> • Enter a new protocol • Update accrual goal information 	
Research Manager	Other
	<ul style="list-style-type: none"> • Protocol and Subject search • Update task lists
	Subjects
	<ul style="list-style-type: none"> • Add new subjects to protocols • Update subjects protocol statuses • Record subject visit updates • Assign treatment arm • Update protocol • Enter deviations
	Protocols
<ul style="list-style-type: none"> • Enter a new protocol • Update accrual goal information • Open to Accrual 	
Data Manager	Financials
	<ul style="list-style-type: none"> • View Financial information
	Other
	<ul style="list-style-type: none"> • Protocol and Subject search • Update task lists • Run Reports
	Protocols
<ul style="list-style-type: none"> • View protocol information and associated documents 	
	Subjects

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	<ul style="list-style-type: none"> • Add new subject information and status • Update treatment <p>Other</p> <ul style="list-style-type: none"> • Update task lists • Protocol and Subject search
<p>Regulatory (Primary or Backup)</p>	<p>Protocols</p> <ul style="list-style-type: none"> • Create new and update protocols • Submit protocols for feasibility reviews • Update status of feasibility reviews • Update protocols closed to accrual, on hold, suspended status • Designate a protocol as 'Terminated' or 'Abandoned' <p>Other</p> <ul style="list-style-type: none"> • Update staff on protocol • View audit/monitoring findings • Run reports • Perform protocol/subject/document searches • Update tasks lists
<p>Pharmacy</p>	<p>Subjects</p> <ul style="list-style-type: none"> • View subjects <p>Protocols</p> <ul style="list-style-type: none"> • View protocol documents <p>Other</p> <ul style="list-style-type: none"> • Run reports • Update task lists
<p>Accounting</p>	<p>Financials</p> <ul style="list-style-type: none"> • Create a new protocol budget versions • Update coverage analyses • Write-off outstanding balances on invoices • Update invoices, invoice number, invoiceable items, invoicing rules, milestones, and visit variations • Create new protocol budget versions • Update protocol and subject-related budget items • Update receipts • Reconcile invoices <p>Calendars</p> <ul style="list-style-type: none"> • View protocol calendars (including unreleased calendars) and subject calendars <p>Subjects</p> <ul style="list-style-type: none"> • View subjects • View subject calendar visits <p>Other</p> <ul style="list-style-type: none"> • Perform protocol/subject/document searches • Run reports

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	<ul style="list-style-type: none"> • Update task lists
System Administrator	Subjects
	<ul style="list-style-type: none"> • Global access
	Protocols
	<ul style="list-style-type: none"> • Global access
	Financials
	<ul style="list-style-type: none"> • Global access
	Calendars
Quality Assurance	<ul style="list-style-type: none"> • Global access
	Other
	<ul style="list-style-type: none"> • Global access
	Audits
	<ul style="list-style-type: none"> • Audit / Monitoring Findings and Setup
Quality Assurance	Subjects
	<ul style="list-style-type: none"> • View Subjects (if assigned to management group) • View Subject Calendars (if assigned to management group)
	Protocols
	<ul style="list-style-type: none"> • View Protocols and associated documents
	Other
	<ul style="list-style-type: none"> • Run Reports