



University of  
**Pittsburgh**®

# **TRAINING CATALOG**

**PITT HEALTH SCIENCES  
CLINICAL TRIALS OFFICE**



**CONFIDENTIAL INFORMATION**

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# TABLE OF CONTENTS

**3** | **Protocal Management**  
*On-Demand Learning Canvas*

**4** | **Subject Management**  
*On-Demand Learning Canvas*

**4** | **Calendars**  
*On-Demand Learning Canvas*

**5** | **Financials**  
*On-Demand Learning Canvas*

**6** | **Administration**  
*On-Demand Learning Canvas*

**7** | **Miscellaneous**  
*On-Demand Learning Canvas*

**8** | **Protocols**  
*Visual Instructor Led Training*

**8** | **Calendar**  
*Visual Instructor Led Training*

**9** | **Subject Management**  
*Visual Instructor Led Training*

**9** | **Financials**  
*Visual Instructor Led Training*

**10** | **Super User  
Protocols, Reviews, Subject**  
*Virtual Instructor Led Training*

**11** | **Super User  
Financials Charge,  
Master, Coverage Analysis &  
Invoicing**  
*Virtual Instructor Led Training*

**12** | **Super User  
Financials Charge,  
Master, Coverage Analysis &  
Invoicing**  
*Virtual Instructor Led Training*

**For Questions or to Register  
for a Session Email:  
ctohelp@pitt.edu**



## CONFIDENTIAL INFORMATION

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# PREREQUISITES

These courses are assigned based on your access to the OnCore CTMS software. They are offered as self-paced, on-demand learning modules through the University of Pittsburgh’s LMS, Canvas. To enroll in these sessions, your Authorized Requestor must submit a ticket to the CTO Help Desk at [ctohelp@pitt.edu](mailto:ctohelp@pitt.edu).

## Section: Protocol Management

### OnCore eLearnings

### Duration

OnCore Demo	30 Minutes
OnCore 100: Navigation	30 Minutes
OnCore 105: Protocols - Basics	30 Minutes
OnCore 110: Protocols - Advanced	30 Minutes
OnCore 115: Document a Basic IRB Review Videos	10 Minutes
OnCore 140: DSMC Console	15 Minutes
OnCore 150: Randomization and Stratification	10 Minutes
OnCore 570: Task Lists Overview	10 Minutes
OnCore 575: Task List Administration in a Protocol	20 Minutes



### CONFIDENTIAL INFORMATION

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# PREREQUISITES

## Section: Subject Management

### OnCore eLearnings

### Duration

OnCore 200: Introduction to Managing Subjects	5 Minutes
OnCore 210: View and Manage Participants in the CRA Console	15 Minutes
OnCore 220: Subject Console and Companion Protocols	15 Minutes
OnCore 230: Subject Registration	15 Minutes
OnCore: 240 Consent and Eligibility	15 Minutes
OnCore 250: On Study	15 Minutes
OnCore 260: Subject Calendars	30 Minutes
OnCore 270: Other Subject Vist Tools	10 Minutes

## Section: Calendars

### OnCore eLearnings

### Duration

OnCore 300: Basic Calendars	60 Minutes
OnCore 320: Calendars Advanced	20 Minutes
OnCore 330: Optional Calendar Segments and Additional Visits	10 Minutes



### CONFIDENTIAL INFORMATION

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# PREREQUISITES

## Section: Financials

### OnCore eLearnings

### Duration

OnCore 400: Financials - Basics	45 Minutes
OnCore 410: Financials - Advanced	90 Minutes
OnCore 415: Overview of Financials Video	12 Minutes
OnCore 420: Charge Master Build	30 Minutes
OnCore 430: Calendar Budget Versions Video	9 Minutes
OnCore 450: Vendor Payables	30 Minutes
OnCore 460: Coverage Analysis Console	20 Minutes
OnCore 470: Budgeting Using the Financials Console	60 Minutes
OnCore 480: Post-Award Financials	20 Minutes



### CONFIDENTIAL INFORMATION

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# PREREQUISITES

## Section: Administration

### OnCore eLearnings

### Duration

<b>OnCore 500: Tips for Troubleshooting eLearning</b>	<b>15 Minutes</b>
<b>OnCore 505: Orgnaizations, Access Groups, Roles, and Permissions</b>	<b>30 Minutes</b>
<b>OnCore 510: Searching and Reporting</b>	<b>45 Minutes</b>
<b>OnCore 515: Audits</b>	<b>20 Minutes</b>
<b>Oncore 530: URM - Registries Management</b>	<b>25 Minutes</b>
<b>OnCore 535: Introductions to Integrations and Interfaces</b>	<b>30 Minutes</b>
<b>OnCore 536: Demographics Interface</b>	<b>5 Minutes</b>
<b>OnCore 537: RPE Interface</b>	<b>5 Minutes</b>
<b>OnCore 538: CRPC (The Billing Grid) Interface</b>	<b>5 Minutes</b>
<b>OnCore 539: Receivables Interface</b>	<b>5 Minutes</b>
<b>OnCore 540: OnCore API</b>	<b>5 Minutes</b>
<b>OnCore 541: OnCore Hub</b>	<b>5 Minutes</b>
<b>OnCore 542: SAE FHIR Interface</b>	<b>90 Minutes</b>
<b>OnCore 550: Jasper Reports in OnCore Recorded Webinar</b>	<b>10 Minutes</b>
<b>OnCore 560: Upgrade Success</b>	<b>30 Minutes</b>
<b>OnCore 565: Reference Lists, Libraries, and Config Settings</b>	<b>20 Minutes</b>
<b>OnCore 580: Task Management Administration</b>	<b>20 Minutes</b>



### CONFIDENTIAL INFORMATION

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# PREREQUISITES

## Section: Miscellaneous

### OnCore eLearnings

OnCore 900: Tips for Handling Amendments
OnCore 950: Jumpstart Primer
OnCore 960: eTraining Checklist
Advarra 200: Data Import (OnCore, EVAL, EDC, eREG)

### Duration

15 Minutes
45 Minutes
40 Minutes
20 Minutes



#### CONFIDENTIAL INFORMATION

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# VIRTUAL INSTRUCTOR LED TRAINING

These optional courses will be available at various times via the Teams platform. The target audience are users who have completed the required prerequisite training. To register, please email [ctohelp@pitt.edu](mailto:ctohelp@pitt.edu)

Training Title	Objectives	Duration
<p><b>OnCore Essentials: University of Pittsburgh Introduction</b></p>	<p>The learner will identify the various roles within the OnCore system.</p> <p>The learner will understand the Canvas training requirements for successful OnCore onboarding. The learner will navigate and utilize the OnCore system with foundational familiarity.</p> <p>The learner will gain an understanding of the CTO workflow integration within OnCore.</p> <p>The learner will recognize the available support resources for using OnCore.</p>	<p><b>60 Minutes</b></p>
<p><b>OnCore Navigator: Mastering PC Console</b></p>	<p>Equip users with the knowledge and skills to effectively navigate and manage patient and protocol-related data within the PC Console.</p> <p>Enable users to streamline key tasks in the PC Console, including subject management, visit tracking, and milestone documentation, to optimize workflow and ensure data integrity in clinical trials.</p>	<p><b>60 Minutes</b></p>
<p><b>OnCore Navigator: Calendars and Coverage Analysis</b></p>	<p>To understand study calendars in OnCore, ensuring that study timelines, visits, and procedures are accurately reflected to support trial execution and compliance.</p> <p>Provide users with skill to understand a Coverage Analysis, effectively distinguishing between standard of care and research-related costs to ensure proper billing and regulatory compliance.</p>	<p><b>60 Minutes</b></p>



**CONFIDENTIAL INFORMATION**

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.



# VIRTUAL INSTRUCTOR LED TRAINING

These optional courses will be available at various times via the Teams platform. The target audience are users who have completed the required prerequisite training. To register, please email [ctohelp@pitt.edu](mailto:ctohelp@pitt.edu)

Training Title	Objectives	Duration
<b>OnCore Subject: Navigator: Streaming CRA &amp; Subject Console</b>	<p>Provide users with the skills to efficiently navigate and utilize the CRA Console, enabling them to manage clinical research associate tasks and study-related data with greater accuracy and speed.</p> <p>Equip users with the knowledge to streamline subject management in the Subject Console, ensuring effective tracking of subject visits, statuses, and study milestones for enhanced clinical trial oversight.</p>	<b>60 Minutes</b>
<b>OnCore Financial Navigator: Budget &amp; Invoicing</b>	<p>Enable users to efficiently manage clinical trial budgets within OnCore, ensuring alignment with sponsor agreements and institutional financial policies.</p> <p>Provide users with the skills to generate, track, and reconcile invoices, ensuring accurate financial reporting and timely payments for clinical trial services.</p>	<b>60 Minutes</b>



## CONFIDENTIAL INFORMATION

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# SUPER USER - PROTOCOLS, REVIEWS, SUBJECTS

The Super User Learning Path is designed for staff members selected by department leads. This virtual instructor-led training offers hands-on experience with the OnCore CTMS software and is tailored for users with intermediate to advanced knowledge of the system.

Training Title	Objectives	Duration
<p><b>Session #1</b>  <b>Pre-Training Preparation</b>  <b>Welcome Meeting</b></p>	<p>System Familiarization: Super Users will be assigned the CTMS Module Training through Canvas.</p> <p>Super Users will gain access to the system in a Staging environment before formal Super User training.</p> <p>Role Clarification: The Super User will have a role in the Staging Environment that mirrors what access they would have in the Production Environment</p>	<p><b>60</b>  <b>Minutes</b></p>
<p><b>Session #2</b>  <b>Core System Training</b></p>	<p>Overview of OnCore CTMS</p> <p>Provide a high-level overview of the system, its modules, and its role in clinical trial management.</p> <p>Detailed Module Training</p>	<p><b>60</b>  <b>Minutes</b></p>
<p><b>Session #3</b>  <b>Study Initiation Meeting</b></p>	<p>To work with the CTO Office to learn the SIM process</p> <p>Begin building protocol and calendar in the system</p>	<p><b>90</b>  <b>Minutes</b></p>
<p><b>Session #4</b>  <b>Troubleshooting and Support Training</b></p>	<p>Common Issues: Educate Super Users on common issues and errors that may arise within the system.</p> <p>Tier 1 Support: Train them on providing Tier 1 support to end-users, including when to escalate issues.</p> <p>Knowledge Base Utilization: Teach how to effectively use and contribute to a knowledge base for ongoing support.</p>	<p><b>60</b>  <b>Minutes</b></p>
<p><b>Session #5</b>  <b>Ongoing Support and Continuous Learning</b></p>	<p>Discuss post-implementation support</p> <p>Onsemble Community</p> <p>Certificate</p>	<p><b>30</b>  <b>Minutes</b></p>



**CONFIDENTIAL INFORMATION**

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# SUPER USER - FINANCIALS CHARGE MASTER, COVERAGE ANALYSIS & INVOICING

The Super User Learning Path is designed for staff members selected by department leads. This virtual instructor-led training offers hands-on experience with the OnCore CTMS software and is tailored for users with intermediate to advanced knowledge of the system.

Training Title	Objectives	Duration
<p><b>Session #1</b>  <b>Overview of Workflows in OnCore – Protocols, Reviews and Subjects</b></p>	<p>Super Users will be assigned the CTMS Module Training through Canvas.</p> <p>Super Users will gain access to the system in a Staging environment before formal Super User training.</p> <p>Role Clarification</p>	<p><b>60 Minutes</b></p>
<p><b>Session #2</b>  <b>Overview of Financial Workflows in OnCore</b></p>	<p>Introduction to the financial module in OnCore</p> <p>Key stakeholders: Billing, Finance, Research teams</p> <p>Overview of charge master, Coverage Analysis, budgets, and invoicing workflows</p>	<p><b>60 Minutes</b></p>
<p><b>Session #3</b>  <b>Charge Master Overview</b></p>	<p>What is a charge master?</p> <p>Charge master setup and maintenance in OnCore                      Associating services with research studies</p> <p>Role in billing and invoicing</p>	<p><b>60 Minutes</b></p>
<p><b>Session #4</b>  <b>Coverage Analysis in OnCore</b></p>	<p>What is Coverage Analysis? Regulatory and compliance context</p> <p>Mapping clinical procedures to standard of care vs. research charges</p> <p>Linking Coverage Analysis to budgets and billing Approval of Coverage Analysis</p>	<p><b>60 Minutes</b></p>



**CONFIDENTIAL INFORMATION**

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.

# SUPER USER - FINANCIALS CHARGE MASTER, COVERAGE ANALYSIS & INVOICING

The Super User Learning Path is designed for staff members selected by department leads. This virtual instructor-led training offers hands-on experience with the OnCore CTMS software and is tailored for users with intermediate to advanced knowledge of the system.

Training Title	Objectives	Duration
<p><b>Session #5</b>  <b>Budget Creation and Negotiation in OnCore</b></p>	<ul style="list-style-type: none"> <li>Building a budget within OnCore</li> <li>Negotiating clinical trial costs with sponsors</li> <li>Budget versioning and updates</li> <li>Linking budgets to Coverage Analysis and charge master</li> </ul>	<p><b>60</b>  <b>Minutes</b></p>
<p><b>Session #6</b>  <b>Invoicing and Financial Reconciliation</b></p>	<ul style="list-style-type: none"> <li>Generating invoices in OnCore</li> <li>Tracking payments and managing overdue invoices</li> <li>Financial reconciliation: Matching budgeted vs. actual expenditures</li> <li>Customizing and generating financial reports</li> </ul>	<p><b>60</b>  <b>Minutes</b></p>
<p><b>Session #7</b>  <b>Custom Reports and Financial Data Analysis</b></p>	<ul style="list-style-type: none"> <li>Introduction to OnCore's reporting capabilities</li> <li>Creating custom financial reports</li> <li>Analyzing financial data for decision-making</li> <li>Best practices for sharing financial reports with stakeholders</li> </ul>	<p><b>60</b>  <b>Minutes</b></p>



**CONFIDENTIAL INFORMATION**

THIS DOCUMENT IS THE PROPERTY OF THE UNIVERSITY OF PITTSBURGH DO NOT DISCLOSE TO THE PUBLIC. THIS DOCUMENT AND ITS CONTENTS ARE PRIVILEGED, COPYRIGHTED, AND CONTAIN CONFIDENTIAL INFORMATION. ALL RIGHTS RESERVED.