



# 2018 Spring Onsemble Conference

## Agenda

### Monday, March 19

11:30AM - 1:00PM

**Lunch**

Cascades Deck & Lawn

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1:00PM - 5:00PM

Champions AB

#### **Best Practices for eLearning Development**

Bring your laptop for this hands-on workshop exploring new ways to ensure success in your development of eLearning. In this session, you will learn best practices for creating eLearning modules with great audio and visual assets. While the topics can be applied to any development tool, exercises in this session will use Articulate Storyline. If you do not already have Storyline 2 or 3 installed on your laptop, please download a 30-day trial prior to attending from <https://articulate.com/p/trial?product=storyline-3>.

**CEUs Available**

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1:00PM - 5:00PM

Champions C

#### **Creating Reports with Jaspersoft® Studio for Forte Applications**

In this workshop, Forte engineers will show how to create and run Jasper Reports within Forte products. They will provide a basic report demo, facilitate a discussion on advanced formatting techniques and host an open forum for Jaspersoft® Studio and reporting questions.

To get the most out of this workshop, we recommend the following:

- Installed Jaspersoft Studio
- Access to an OnCore (or other Forte application) database
- Configured a Jaspersoft Studio Data Adaptor
- Intermediate SQL Knowledge

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3:00PM - 5:00PM

Champions GH

#### **Forte Solution Overviews: Getting the Most out of Onsemble**

Do you want to brush up on your knowledge of Forte products? This workshop will cover Forte product workflows, providing a foundation that will be useful for sessions throughout the conference. Each 20 minute session will give you a basic overview of the Forte solutions in a specific area. Come for a single session or stay for them all!

3:00-3:30pm: Financial Management  
3:30-4:00pm: Analytics and Reporting  
4:00-4:30pm: Data Management  
4:30-5:00pm: Study Management

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6:00PM - 8:00PM

The American Gator Club

#### **Welcome Reception**

Kick off the conference with a poolside dinner reception!

### Tuesday, March 20

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6:15AM - 7:00AM

Tournament Hall A

#### **Morning Yoga**

Start your day off with yoga led by local instructors! Yoga mats, towels, and water will be provided. Please arrive 5-10 minutes prior to the start of the session.



# 2018 Spring Onsemble Conference

## Agenda

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7:30AM - 8:30AM

### Breakfast

Cascades Deck & Lawn

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8:30AM - 10:00AM

### Keynote

Champions DE

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10:30AM - 11:20AM

### Planning and Implementing a New Process

Champions C

In this session, Molly Jackson will discuss how IU Simon Cancer Center has improved the process of handling study kits through the utilization of OnCore specifications. IU previously tracked these outside of OnCore, which resulted in duplicate data entry. They utilized the study specification to alleviate this extra work and to allow for improved scheduling and study kit preparation. After updating specifications of all current studies and a successful pilot period, IU trained all staff and went live with the new process.

**Best Practices and Workflows**

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10:30AM - 11:20AM

### Effort Tracking Data Justifying Workloads and Financial Feasibility

Champions AB

In this session, representatives from the University of Arizona Cancer Center (UACC) will discuss how they utilize effort tracking data to verify financial and operational workload estimates throughout a research project. They will share how they combine OnCore custom report data with other institutional data sets automatically to verify research project estimates. UACC will also discuss how this practice has improved their ability to more precisely track actual staff costs per trial; to improve future trial budgets; to manage staff workloads more efficiently; and to differentiate temporary staff overloads from permanent workload increases.

**Analytics and Reporting CEUs Available**

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10:30AM - 11:20AM

### Tips for Teaching OnCore Financials

Champions F

Teaching OnCore Financials to end users is always a hot topic during our OnCore Train the Trainer course. In this session, Forte's Abby Ehringer will share tips and best practices for teaching OnCore Financials functionality and workflows successfully, including how to build a training environment and how to teach a mixed group of people who will share pre-award and post-award responsibilities in OnCore. This session is designed for OnCore team members who are responsible for conducting end-user training; attendees are assumed to have a basic familiarity with OnCore Financials.

**Financials**

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10:30AM - 11:20AM

### Uses for Task Lists

Champions GH

During this session, representatives from the Barbara Ann Karmanos Cancer Institute and the University of Michigan will participate in a panel discussion regarding use of task lists to monitor studies from beginning to end, including: feasibility, open to accrual, budgets, contracts, calendar, AAHRPP and archival.

**Data Management**

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11:30AM - 1:00PM

### Lunch

Cascades Deck & Lawn



# 2018 Spring Onsemble Conference

## Agenda

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1:00PM - 1:50PM

Champions C

### Implementation and Use of Bartender

Shane Baker, Forte's Senior Systems Administrator, will discuss the interaction between OnCore BSM and the barcode label creation software Bartender. This session will be Q&A format, so please bring questions!

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1:00PM - 1:50PM

Champions AB

### Improving AR

With the average invoice in clinical research regularly reaching 180-300 days past due, collecting money owed to research sites is becoming more and more difficult. In this session, Eric Borhardt and Laura Hilty will discuss the current state of AR from an average research site, share feedback received from pharmaceutical companies regarding the reasons for delayed payments and offer steps that can be taken to ensure invoices are paid in a timely manner.

**Financials CEUs Available**

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1:00PM - 1:50PM

Champions GH

### Enterprise Rollout: Starting off on the Right Foot!

In this session, Katie Eddleton and Brian Sevier from The University of Florida (UF) will share their ongoing experience implementing OnCore enterprise-wide. Using lessons learned from an "early adopter" cohort of research teams, UF created a process for identifying and building a portfolio of research projects in OnCore ahead of a formal go-live rollout date. This decision entailed building a large number of studies simultaneously with the delivery of end user training. Katie and Brian will discuss the benefits of this approach, and share specific tools, strategies, and lessons learned from their journey.

**Best Practices and Workflows CEUs Available**

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2:00PM - 2:50PM

Champions C

### Retrospective: Rapid Institution-Wide Integration of OnCore and Epic

Having implemented and adopted both OnCore and Epic in the same year, representatives from UMass Medical School will provide a unique perspective on change management. In this presentation, they will discuss key issues and challenges arising from the implementation of large-scale information technology across a decentralized institution. By taking advantage of the autonomous nature of the organization, they facilitated a rapid cross-institution adoption and implementation of OnCore, successfully meeting a very tight deadline required by their Epic go-live date.

**Informatics and Development CEUs Available**

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2:00PM - 2:50PM

Champions F

### Lab Automation with BSM Workflows

Establishing a high throughput workflow requires automation. During this session, Colleen Mitchell from Indiana University will demonstrate how to maintain chain of custody with specimen annotations while processing and importing data into OnCore's Biospecimen Management (BSM) module.

**CEUs Available**



# 2018 Spring Onsemble Conference

## Agenda

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2:00PM - 2:50PM

Champions GH

### Financials Strategy: Implementation of the "CAT" Coverage Analysis Team

In this session, David Goodrich from Indiana University will highlight the integration of OnCore financials with IU's newly-established Coverage Analysis Team (CAT). The CAT includes three components - applications support, systems analysis, and an analytics unit - which are clearly delineated to reinforce accountability and data quality.

**Financials CEUs Available**

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2:00PM - 2:50PM

Champions AB

### User Adoption and Workflow Compliance

During this session, Forte's Jill McKinley will discuss end user adoption and compliance to workflows. This session will feature an interactive discussion where you will learn tips and tricks, while sharing insights from your experiences with end user adoption and workflow development.

**Best Practices and Workflows**

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3:00PM - 4:30PM

Champions DE

### A Deep Dive into Operational Goals with Forte Technologies

This session will feature Forte customers' perspectives on improving operational workflows through the use of Forte technology. Products showcased will be: eREG, EDC, Insights and Payments. Join us to learn more from industry leaders! Product demos will be available following this session and throughout the conference.

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4:30PM - 5:30PM

Champions Foyer

### Product Q&A Happy Hour

Have a question you didn't get to ask at the end of your session, or interested in learning more about a Forte product? We invite you to stop by to socialize during this happy hour to engage with the experts!

## Wednesday, March 21

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6:15AM - 7:00AM

Tournament Hall A

### Morning Yoga

Start your day off with yoga led by local instructors! Yoga mats, towels, and water will be provided. Please arrive 5-10 minutes prior to the start of the session.

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7:30AM - 8:30AM

Cascades Deck & Lawn

### Breakfast

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8:30AM - 9:20AM

Champions E

### Subject Calendars & Visit Tracking: How to Condense a Training Program into a One-Page Synopsis

Clinical trials couldn't happen without the blood, sweat and tears of the clinical research coordinator (CRC). In a fast-paced setting, it's imperative that OnCore trainers provide adequate documentation to aid the CRC in navigating through OnCore with speed and efficiency. In this session, Indiana University's Marco Rankin will demonstrate and discuss the importance of condensing training & support documents into a one-page synopsis.

**Best Practices and Workflows CEUs Available**



# 2018 Spring Onsemble Conference

## Agenda

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8:30AM - 9:20AM

Champions D

### Operational Lessons Learned with OnCore Financials

During this session, Beth Kettinger from Ochsner Health System will highlight the important lessons learned throughout Ochsner's OnCore financials implementation. This session will also highlight recently implemented changes at the national level, which affect how clinical trial financials are managed on a daily basis.

**Financials CEUs Available**

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8:30AM - 9:20AM

Champions AB

### Quality Management Systems

What is a Quality Management System for a biobank? All biobanks want to have a high level of quality. In this session, Colleen Mitchell from Indiana University will share lessons learned by IU while setting up their QMS and how BSM reporting was integral to the process.

**CEUs Available**

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8:30AM - 9:20AM

Champions GH

### Data Table 4 from CTRP for Interventional Trials

In this session, Ray Skeps will share how the Fred Hutchinson Cancer Center has approached the transition to using CTRP data to generate Data Table 4 (DT4) in interventional trials for non-competing CCSG applications in FY18. He will discuss how his organization implemented a review of the table produced by CTRP to ensure the accuracy of variables such as study descriptors, accrual totals and institutional associated protocols. Ray will also detail various tasks performed, as well as tools used, by the Fred Hutchinson Cancer Center to ensure proper reporting.

**Analytics and Reporting CEUs Available**

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9:30AM - 10:20AM

Champions AB

### CAP Certification Process for a Biobank

This session will feature a discussion on approaching biobanking accreditation and the processes associated with preparations for becoming accredited by CAP. Mike Denton from Indiana University will discuss how to create a quality management system (QMS), a CAP GAP analysis, and the preparations IU has undertaken to prepare for the CAP accreditation process.

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9:30AM - 10:20AM

Champions D

### Extending OnCore via Oracle APEX

Oracle Application Express (APEX) is a full-blown rapid application development environment that comes free with any version of Oracle. In this session, Bob Lenese will share how CWRU has used APEX to develop a standalone OnCore reporting environment that is more versatile, secure, and robust than Jasper Reports. CWRU has also extended the uses of OnCore via the APEX (Oracle) database to design and develop custom database applications that can easily link to the OnCore database. Bob will provide a brief run through of what APEX is and how it's different from Jasper Reports. In addition, he will share examples of how CWRU has extended OnCore in Cancer Center Administration areas that have added efficiency and value to the group.

**Informatics and Development**

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9:30AM - 10:20AM

Champions GH

### Customer Financials Reporting Collaboration

During this session, Jeff Parks from Forte will lead a working group discussion on the high level needs for Accounts Receivable reporting within OnCore. Customer collaborators will be asked to share insights into their current solutions for this need as well as provide input into potential future Forte solutions.

**Financials**



# 2018 Spring Onsemble Conference

## Agenda

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9:30AM - 11:20AM

Champions E

### How to Successfully Staff Your Project Team (Double Session)

OnCore implementation is a major undertaking for centers of all sizes. In this session, learn from the Forte team about the various aspects of staffing and resourcing your site for a successful project. Several customers will also share their experience with OnCore, including lessons learned and best practices for implementation.

**Best Practices and Workflows**

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10:30AM - 11:20AM

Champions AB

### Speeding Telephone Assisted Recruitment to Studies (STARS)

In this session, Diane Schwartz of the University at Buffalo will present the STARS iOS/Android mobile application. Linked to OnCore, the application is designed to facilitate direct recruitment of participants to clinical trials based on their interests. The system minimizes the effort of principal investigators, and assists with a specific method of recruitment that has been effective with potential participants.

**Informatics and Development CEUs Available**

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10:30AM - 11:20AM

Champions GH

### Web Application for CTRP Accrual Management

In this session, Olga Tchuvatkina and Pawel Przybysz will highlight how the Fox Chase Cancer Center developed a custom web application utilizing the CTRP API to submit accrual data from OnCore to CTRP for both IIT and industry studies. Data quality reports implemented as part of the application compare study metadata between OnCore and CTRP and corresponding DT4 generated by each system.

**Analytics and Reporting CEUs Available**

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10:30AM - 11:20AM

Champions D

### Financials Implementation: Flexibility, Perseverance & Results

The University of Maryland Greenebaum Comprehensive Cancer Center, a university-based NCI matrix cancer center, successfully implemented OnCore Financials two years ago. During this session, representatives of UMGCCC will discuss financials implementation best practices. They will share their experiences on implementation, including ongoing support from Forte, buy-in and participation of numerous campus and hospital entities, continuous process improvement, reallocation of staff and resources, compromise and focus.

**Financials CEUs Available**

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11:30AM - 1:00PM

Cascades Deck & Lawn

### Lunch

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1:00PM - 1:50PM

Champions AB

### OnCore TUTOR Newsletter

Julie Anderson will share a key initiative implemented by the University of Michigan to boost OnCore user adoption. The OnCore TUTOR (Tips, Updates & Techniques for the OnCore Researcher) is a weekly newsletter that goes out to OnCore end users with upcoming training opportunities, updates, questions received by the OnCore Team, support, and much more. Julie will discuss experiences creating the TUTOR newsletter, and share how its implementation has helped engage OnCore users at the university.

**Best Practices and Workflows**



# 2018 Spring Onsemble Conference

## Agenda

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1:00PM - 1:50PM

Champions GH

### Vendor Payables Collaboration: Current State and Future Plans

OnCore vendor payables is a key feature coming to OnCore in 2018. In this session, Jeff Parks of Forte will highlight the goals, current progress, and future direction of the vendor payables customer collaboration. He will cover the use cases for this feature within OnCore and give a recap of how customer input is shaping the direction of this project.

**Financials**

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1:00PM - 1:50PM

Champions D

### Beyond the Box - Supplementing OnCore

Josh Fehrmann of the University of Minnesota will share how sites can supplement OnCore to get even more productivity from their research teams. He will provide an informatics-based perspective in response to common business challenges discovered during OnCore implementation. The University of Minnesota (UMN) has over 15 years of experience using OnCore, and those attending will learn about key challenges and opportunities faced during the OnCore implementation that lead to tool development for: 1) Easy Protocol Entry and Adoption, 2) Recruitment, 3) Financial tracking, 4) Reporting, and more.

**Informatics and Development CEUs Available**

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1:00PM - 2:50PM

Champions E

### The Importance of Data Cleaning and Quality in Clinical Research (Double Session)

During this interactive session, Forte's Wendy Tate and Regina Schwind will discuss the importance of regular data cleaning for quality reporting and analytics. In the second part of this session, you'll hear different experiences sites have had with implementing data quality processes at various stages of their OnCore implementation.

**Analytics and Reporting CEUs Available**

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2:00PM - 2:50PM

Champions AB

### How OnCore Can Facilitate Billing Compliance

In this session, representatives from the MedStar Health Research Institute will discuss how their organization uses tools in OnCore to facilitate billing compliance, despite the lack of an interface with their hospital billing system. They will share how the implementation of OnCore enhanced their existing process, and how the use of the planned visits report, customized billing slip, patient interval report, and billing grid have been integrated into a new workflow that has increased billing compliance. The team will discuss how OnCore has increased transparency between their partner university (Georgetown) and the health system, thereby increasing compliance with research billing in the university.

**Financials CEUs Available**

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2:00PM - 2:50PM

Champions D

### OnCore Implementation Best Practices

During this session, Renata Panchal from Memorial Sloan Kettering Cancer Center will discuss the implementation process for OnCore. An aggressive 9-month timeline was stipulated by MSK's Leadership, including implementation of calendars and financials, establishment of multiple system integrations, and a significant data migration. In retrospect, many lessons were learned. Many successes and a few challenges were identified. Renata will share best practices from her short and robust implementation. Her focus will be on implementation scope and planning, leadership engagement and vision, project staffing, communication plan, and end user training.

**Best Practices and Workflows CEUs Available**



# 2018 Spring Onsemble Conference

## Agenda

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3:00PM - 4:30PM

**Midwest Region - Site Empowerment**

Champions E

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3:00PM - 4:30PM

**Northeast Region - Site Empowerment**

Champions AB

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3:00PM - 4:30PM

**Southeast Region - Site Empowerment**

Champions D

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3:00PM - 4:30PM

**West Region - Site Empowerment**

Champions GH

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6:00PM - 9:00PM

**Final Night Dinner**

TPC Sawgrass Golf Club

Join us at the famous TPC Sawgrass Golf Club for drinks, dinner and entertainment. Transportation will be provided to and from dinner. It's a night that can't be missed! The shuttle will run continuously from the hotel from 5:45pm – 7:00 pm. Please meet at the Convention Center doors for the shuttle. *Note: the Convention Center doors are located next to conference registration desk, not the hotel front doors.*

### Thursday, March 22

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7:30AM - 8:30AM

**Breakfast**

Cascades Deck & Lawn

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8:30AM - 4:30PM

**Coverage Analysis Certification™**

Stadium

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8:30AM - 9:20AM

**Hot Topics from Onsemble Groups**

Champions D

This session will feature a discussion, led by Forte's Jill McKinley and Natalie Hellmer, on recent hot topics from Onsemble Groups. Come prepared to join in an active discussion on such topics as: effective use of notifications, managing basket trials (i.e. MATCH), tracking conflicts of interest, tracking patient screening, billing slip use and customizations, tracking different kinds of consent and more.

**Data Management**



# 2018 Spring Onsemble Conference

## Agenda

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8:30AM - 10:20AM

### **PRMS Deep Dive into Prioritization and Low Accrual Monitoring (Double Session)**

Champions E

A Protocol Review and Monitoring System (PRMS) is required at all NCI-designated cancer centers. PRMS is charged with developing an internal mechanism for scientific peer-review of cancer clinical trials, to include evaluation of scientific merit, prioritization, feasibility and scientific progress of active studies. This session will target centers utilizing a scientific review process such as PRMS, with a focus on prioritization and low accrual monitoring requirements. This will be an interactive session with live audience participation. The speakers will provide data on how institutions operationalize these issues and, if time allows, will also discuss PRMS operational issues.

**Best Practices and Workflows CEUs Available**

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9:30AM - 10:20AM

### **Maintaining Jasper reports in OnCore**

Champions AB

In this session, Misha Zimmel from University of Virginia will highlight how to maintain Jasper reports in OnCore. He will discuss various topics, including information on Jasper Studio, finding pertinent data sources and keeping up with changes introduced by OnCore upgrades.

**Informatics and Development**

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9:30AM - 10:20AM

### **Multi-Site Trials Without Borders: Research in Resource Limited Settings**

Champions E

Managing investigator-initiated trials can prove daunting even in the best of circumstances, requiring optimal project planning and structure, adaptability, creative problem solving and a sense of humor along the way. Running IITs in resource-limited settings brings this set of challenges to a higher level, and with it comes opportunity for exceptional clinical trials management with exponential impact in areas of the world where the need is greatest. Teresa Latham from Cincinnati Children's Hospital Medical Center will share clinical trials management methods on an international scale, including best practices for protocol implementation, data management, quality monitoring, and analysis in unique settings.

**Data Management CEUs Available**

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9:30AM - 10:20AM

### **Forte EDC Collaboration: Current State and Future Plans**

Champions D

In this session, Shannon Roznoski of Forte will highlight the goals, current progress, and future direction of the Forte EDC collaboration. Kicked off in early 2018, the collaboration is providing Forte customers with an early look at the upcoming OnCore to Forte EDC integration, and gathering feedback from the community. Shannon will provide a sneak peek at Forte EDC 8.0, and share how the collaboration is shaping the EDC roadmap.

**Data Management**



# 2018 Spring Onsemble Conference

## Agenda

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10:30AM - 11:20AM

Champions E

### Going Enterprise: Strategies & Lessons Learned

The OnCore team from The Children's Hospital of Philadelphia (CHOP) will share lessons learned as the first pediatric site to transition from cancer center to enterprise. First, they will discuss their implementation strategy, along with the importance of strategic alignment and buy-in from cancer center and research institute leadership. They'll then cover their intake process, interfaces, and how they engaged institutional information systems resources early in the process. Finally, they will describe their OnCore team structure, including the importance of dedicated training support and ways to advocate for resources to ensure a successful implementation.

**Best Practices and Workflows CEUs Available**

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10:30AM - 11:20AM

Champions D

### Using Feasibility to Enhance Trial Success

In this session, Wendy Tate from Forte will provide her perspective on the benefits of implementing feasibility processes. Through a multi-institutional partnership, study activation time appeared shorter after implementing a committee.

**Best Practices and Workflows CEUs Available**

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11:00AM - 12:00PM

Champions Foyer

### Grab N' Go Lunch

**Friday, March 23**

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8:00AM - 12:00PM

Stadium

### Coverage Analysis Certification™

Forte, in collaboration with Research Matrix, is offering a 1.5 day workshop which is pre-approved for up to 16 hours of continuing education credit through SOCRA and ACRP. The workshop is specifically designed to leverage OnCore functionality to maximize the utility of OnCore billing grids, coverage analyses, and streamlining the budget development process. The workshop also includes an interactive and hands-on tutorial to address the fundamentals of coverage analysis and workflow engineering decisions related to OnCore financials implementation through the clinical research budgeting and billing continuum.

This session is best suited for those who perform or manage coverage analysis, clinical research billing compliance stakeholders, or individuals with interest in OnCore financials and coverage analysis. Upon completion of the workshop, attendees will earn 12 continuing education credits. Attendees will also have the opportunity to become certified through Forte and Research Matrix, and earn an additional 4 continuing education credits by passing the practicum-based exercises that refine both OnCore and coverage analysis skills.

Bishoy Anastasi and his team of coverage analysts will provide instruction during this course. Bishoy brings over 15 years of clinical research management experience and 7 years of direct coverage analysis experience. His current role involves overseeing the central development of clinical research study budgets in OnCore, negotiation of industry-sponsored clinical trial agreements, development and deployment of enterprise clinical research training curriculum, and co-authoring several key clinical research policies. He has also served roles involved with regulatory services, study coordination, business management, and contract negotiation. Bishoy is collaborating with Research Matrix which is focused on streamlining industry coverage analysis practices.

Breakfast and lunch will be provided on Thursday and Friday. By selecting this pass, you are registering to attend both days of training. Please bring a laptop for this certification.