

# University of Michigan OnCore Role Descriptions

Role Description Quick Links
<a href="#">Clinical Research Associate (Study Coordinators, CSCs, CRCs, and Project Managers)</a>
<a href="#">Co-Investigators</a>
<a href="#">CRAO Staff</a>
<a href="#">CTSU Administrators</a>
<a href="#">CTSU Financial Coordinators</a>
<a href="#">CTSU Medical Directors</a>
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<a href="#">Protocol Coordinators (CTSU CRPMs)</a>
<a href="#">Revenue Cycle Research Billers</a>

Role	Role Summary
Clinical Research Associates (Study Coordinators, CSCs, CRCs, and Project Managers)	<p>Subjects</p> <ul style="list-style-type: none"> <li>• Add new subjects to protocols</li> <li>• Update subjects' protocol statuses</li> <li>• Record subject visit updates</li> <li>• Assign randomized treatment</li> </ul> <p>Protocol</p> <ul style="list-style-type: none"> <li>• Document IRB Review results</li> <li>• Update accrual goal information</li> </ul> <p>Financial</p> <ul style="list-style-type: none"> <li>• View financial and charge master information</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Set up notifications</li> <li>• Run reports</li> <li>• View audit/monitoring findings</li> <li>• Update task lists</li> </ul>
Co-Investigators	<p>Protocols</p> <ul style="list-style-type: none"> <li>• View protocol information</li> </ul> <p>Subjects</p> <ul style="list-style-type: none"> <li>• View subject information for subjects on their protocols</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Run reports</li> <li>• Update task lists</li> </ul>
CRAO Staff	<p>Financial</p> <ul style="list-style-type: none"> <li>• Create a new version of or make edits to the charge master</li> <li>• Import a new version of the charge master</li> <li>• Update coverage analyses</li> <li>• Write-off outstanding balances on invoices</li> <li>• Update invoices, invoice number, invoiceable items, invoicing rules, milestones, and visit variations</li> <li>• Create new protocol budget versions</li> <li>• Update protocol- and subject-related budget items</li> <li>• Update receipts</li> <li>• Reconcile invoices</li> </ul> <p>Calendars</p>

	<ul style="list-style-type: none"> <li>• View protocol calendars (including unreleased calendars) and subject calendars</li> <li>• Create new and update protocol calendar versions</li> </ul> <p>Protocols</p> <ul style="list-style-type: none"> <li>• Update protocol sponsor information</li> <li>• View protocol review information</li> </ul> <p>Subjects</p> <ul style="list-style-type: none"> <li>• View subject information</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Schedule Jasper Reports</li> <li>• Run reports</li> <li>• Perform protocol/subject/document searches</li> <li>• Update task lists</li> </ul>
<p>CTSU Administrators</p>	<p>Protocols</p> <ul style="list-style-type: none"> <li>• Create new and update protocols</li> <li>• Submit protocols for feasibility reviews</li> <li>• Update status of feasibility reviews</li> <li>• Provide CTSU Signoff for protocols</li> <li>• Update protocol's closed to accrual, on hold, suspended status</li> <li>• Designate a protocol as 'Terminated' or 'Abandoned'</li> </ul> <p>Reviews</p> <ul style="list-style-type: none"> <li>• View audit/monitoring findings</li> <li>• Create new DSMC meetings</li> <li>• Add/remove DSMC reviewers</li> <li>• Update DSMC reviews</li> </ul> <p>Subjects</p> <ul style="list-style-type: none"> <li>• View subjects and subject calendars</li> <li>• Move subjects to newly released calendars</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Update staff protocol/subject assignments</li> <li>• Set up notifications</li> <li>• Run reports</li> <li>• Schedule Jasper Reports</li> <li>• Perform protocol/subject/document searches</li> <li>• Update task lists</li> </ul>

<p>CTSU Financial Coordinators</p>	<p>Financials</p> <ul style="list-style-type: none"> <li>• Create new protocol budget versions</li> <li>• Update coverage analyses</li> <li>• Write-off outstanding balances on invoices</li> <li>• Update invoices, invoice number, invoiceable items, invoicing rules, milestones, and visit variations</li> <li>• Create new protocol budget versions</li> <li>• Update protocol- and subject-related budget items</li> <li>• Update receipts</li> <li>• Reconcile invoices</li> </ul> <p>Calendars</p> <ul style="list-style-type: none"> <li>• View protocol calendars (including unreleased calendars) and subject calendars</li> </ul> <p>Subjects</p> <ul style="list-style-type: none"> <li>• View subjects</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Schedule Jasper Reports</li> <li>• Perform protocol/subject/document searches</li> <li>• Run reports</li> <li>• Update task lists</li> </ul>
<p>CTSU Medical Directors</p>	<p>Protocols</p> <ul style="list-style-type: none"> <li>• Provide PI Signoff for protocols</li> <li>• Document feasibility and scientific reviews decisions</li> </ul> <p>Subjects</p> <ul style="list-style-type: none"> <li>• View subject information</li> </ul> <p>Calendars</p> <ul style="list-style-type: none"> <li>• View protocol calendars (including unreleased calendars) and subject calendars</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Perform protocol/subject/document searches</li> <li>• Run reports</li> </ul>
<p>Principal Investigators</p>	<p>Protocols</p> <ul style="list-style-type: none"> <li>• View protocol information</li> <li>• Provide PI Signoff for protocols</li> </ul> <p>Subjects</p> <ul style="list-style-type: none"> <li>• View subject information</li> </ul> <p>Calendars</p> <ul style="list-style-type: none"> <li>• View protocol calendars (including unreleased calendars) and subject calendars</li> </ul> <p>Reviews</p> <ul style="list-style-type: none"> <li>• View audit/monitoring findings</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Schedule Jasper Reports</li> <li>• Perform protocol/subject/document searches</li> <li>• Run reports</li> <li>• Update task lists</li> </ul>
<p>Protocol Coordinators (CTSU CRPMs)</p>	<p>Protocols</p> <ul style="list-style-type: none"> <li>• Create new and update protocols</li> <li>• Submit protocols for feasibility reviews</li> <li>• Update status of feasibility reviews</li> <li>• Update protocol's closed to accrual, on hold, suspended status</li> </ul>

	<ul style="list-style-type: none"> <li>• Designate a protocol as 'Terminated' or 'Abandoned'</li> </ul> <p>Subjects</p> <ul style="list-style-type: none"> <li>• Add new subjects to protocols</li> <li>• Update subjects' protocol statuses</li> <li>• Record subject visit updates</li> <li>• Assign randomized treatment</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Update staff protocol/subject assignments</li> <li>• View audit/monitoring findings</li> <li>• Schedule Jasper Reports</li> <li>• Set up notifications</li> <li>• Run reports</li> <li>• Perform protocol/subject/document searches</li> <li>• Update task lists</li> </ul>
<p>Revenue Cycle Research Billers (RCRBs)</p>	<p>Calendars</p> <ul style="list-style-type: none"> <li>• View protocol calendars (including unreleased calendars) and subject calendars</li> </ul> <p>Protocols</p> <ul style="list-style-type: none"> <li>• View protocol review information</li> </ul> <p>Other</p> <ul style="list-style-type: none"> <li>• Perform protocol/subject/document searches</li> <li>• Run reports</li> <li>• Update task lists</li> </ul>