

# SPARCDashboard

Research Made Easy

## SPARCDashboard Step-By-Step Training Guide

The **SPARCDashboard** module is the SPARC module for reviewing, modifying or creating protocols for authorized users, including study team members, administrative users, and super users. It can be accessed from the URL (<http://sparc.musc.edu/dashboard>) or the **SPARCDashboard** button on the navigation bar.



South Carolina  
Clinical & Translational  
Research Institute



SPARCRequest SPARCDashboard SPARCFulfillment SPARCCatalog SPARCReport Logged in as serguiso@musc.edu Logout All Notifications 1

### I. Homepage

This is a landing page showing all of the protocols that the logged-in user has rights to.

SPARCRequest SPARCDashboard SPARCFulfillment SPARCCatalog SPARCReport 1. Logged in as hewwe@musc.edu Logout Surveys Epic Queue All Notifications 1

Filter Protocols Save | Reset

Search All -

Archived

Status - Any -

Organization - Any -

Owner - Any -

My Protocols

My Admin Protocols

2. Filter

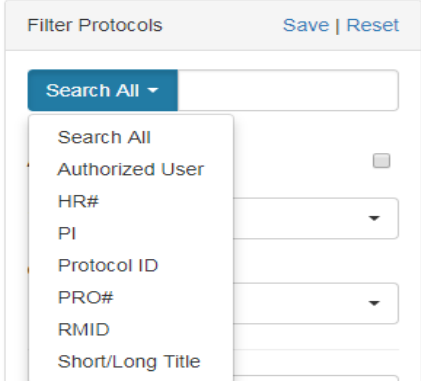
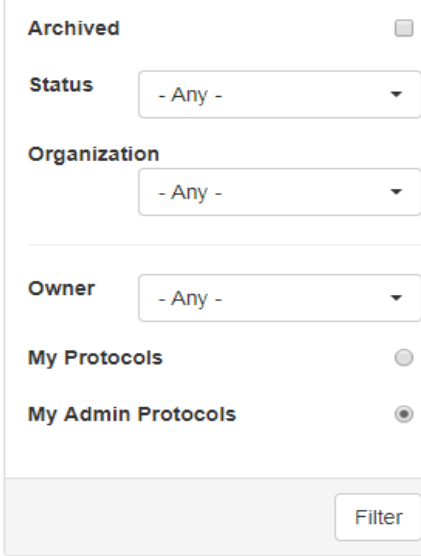
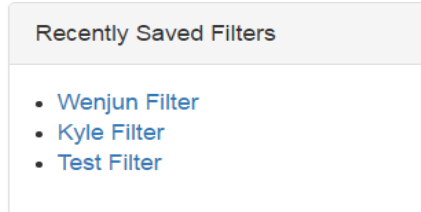
Recently Saved Filters


- Media
- Nexus Approved
- Research Medication/Drugs

**Protocols**  
Displaying protocols 1 - 30 of 6488 in total Export + New Protocol

Protocol ID	Short Title	PI(s)	Requests
11507	ACP-KXL-308	Karoline Rocha	
11506	Testing Doc2	Wenjun He	Requests
11505	Test2	Wenjun He	Requests
11504	Test Doc	Wenjun He	Requests
11503	Training Test	Wenjun He	Requests
11502	Test1115_WH	Laila Forney	Requests
11501	TEST	Whitney Lesch	Requests
11500	Coastal Carolina Research Center Adult RSV/Flu Vaccine Trial	Amy Gandy	
11499	cTBS for Cocaine Users in CDAP	Colleen Hanlon	Requests
11498	FLX-787	i-hweil Chen	Requests
11487	Rebiotix-PUNCH CD3	Scott Curry	Requests
11486	ITAR <span>3.</span>	Christopher Gross	Requests

Section 1. Navigation Bar	Description
	Navigation buttons to other SPARC modules
	View/Manage protocols that are being queued to send to Epic
	Link out to the Survey Builder page
	Notification center

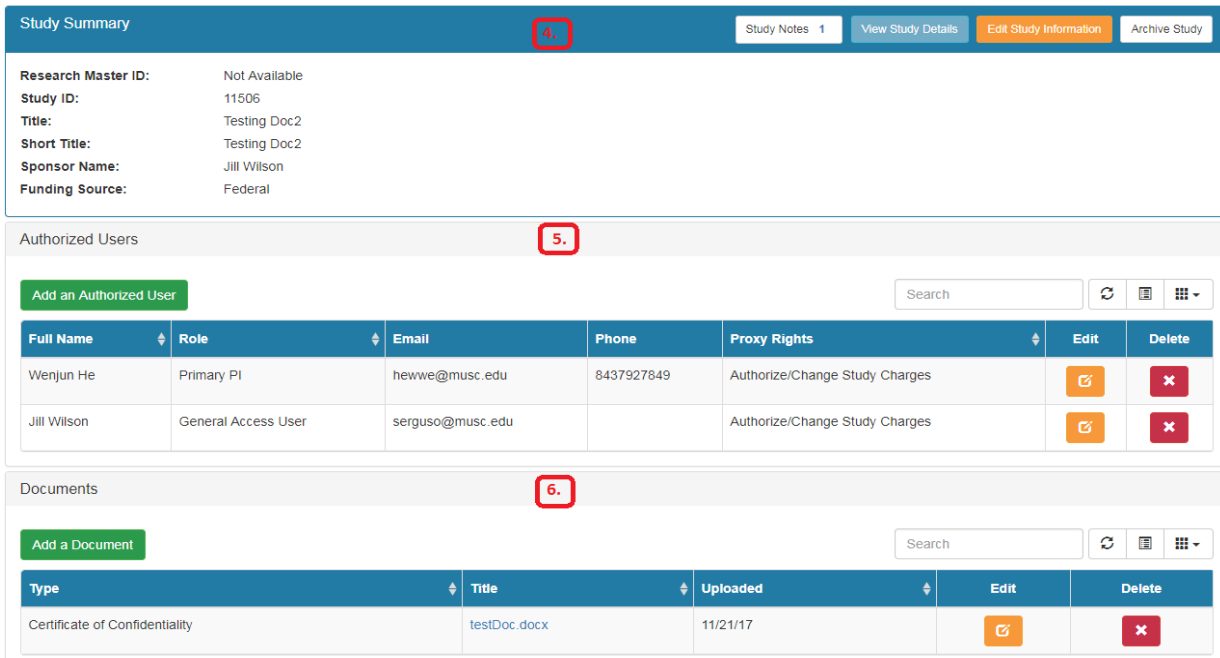
Section 2. Protocol Filters	Description
	<p>Save the current filter as a favorite or reset the entered contents to start over</p> <p>Free text search using one of the options, or using the default "Search All"</p>
	<p>Show archived protocols</p> <p>Filter by request statuses</p> <p>Dropdown list showing all of the organizations (institution/provider/program/core) that the logged-in administrative user has rights to; or all of the organizations that the logged-in user has requests with</p> <p>Drop-down list showing all owners (assigned service providers) on the requests listed on the page</p> <p>View all protocols as an authorized user; this option only displays for administrative users</p> <p>All protocols which contain services in your admin organization</p> <p>Select this button after choosing the filter criteria</p>
	<p>Hyperlinks to the previous saved search filters (shows most recent 15)</p>

Section 3. Protocol List	Description
	<p>Overview of the studies/projects; each column is sortable</p>

Section 3. Protocol List	Description
<a href="#">Requests</a>	Shows a snapshot of protocol in a popup window
<a href="#">Export</a>	Generates an excel report with the displayed protocols
<a href="#">+ New Protocol</a>	Create a new study/ project

## II. Protocol Page

This page is available to both authorized study team users and admin users who have access to the protocol.



The screenshot shows the 'Study Summary' page. Callout 4 points to the 'Study Notes 1' button. Callout 5 points to the 'Authorized Users' section header. Callout 6 points to the 'Documents' section header.

**Study Summary**

Study Notes 1 | View Study Details | Edit Study Information | Archive Study

Research Master ID: Not Available  
 Study ID: 11506  
 Title: Testing Doc2  
 Short Title: Testing Doc2  
 Sponsor Name: Jill Wilson  
 Funding Source: Federal

**Authorized Users**

Add an Authorized User | Search | Refresh | Print | Grid




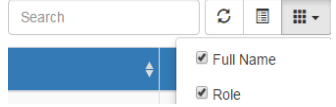
Full Name	Role	Email	Phone	Proxy Rights	Edit	Delete
Wenjun He	Primary PI	hewwe@musc.edu	8437927849	Authorize/Change Study Charges	<a href="#">Edit</a>	<a href="#">Delete</a>
Jill Wilson	General Access User	serguso@musc.edu		Authorize/Change Study Charges	<a href="#">Edit</a>	<a href="#">Delete</a>


**Documents**

Add a Document | Search | Refresh | Print | Grid




Type	Title	Uploaded	Edit	Delete
Certificate of Confidentiality	testDoc.docx	11/21/17	<a href="#">Edit</a>	<a href="#">Delete</a>

Section 4. Study Summary	Description
<a href="#">Study Notes 1</a>	Protocol level notes
<a href="#">View Study Details</a>	Ability to view previously entered protocol information
<a href="#">Edit Study Information</a>	Ability to edit/update protocol information (including Epic questions); Admin users are able to view and/or edit the answers to Epic questions that have been entered
<a href="#">Archive Study</a>	Archives the study/project

Section 5. Authorized Users	Description
	Ability to add authorized users
	Ability to edit authorized users
	Ability to delete authorized users
	Toolbox for search, toggle, and column selection(s)




Section 6. Documents	Description
	Ability to upload any associated document files (i.e. study protocol; consent forms, etc.)

Requests - Draft - 11/20/17 7. [View Consolidated Request](#) [Export Consolidated Request](#) [Coverage Analysis Report](#)

[Add / Modify Request](#)    

SRID	Organization	Owner	Status	Notifications	Actions
11506-0002	SCTR/Research Nexus	-	Draft	<a href="#">Send Notification</a>	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Admin Edit</a>
11506-0004	Hospital Services -Technical (HB)/Nuclear Medicine	-	Draft	<a href="#">Send Notification</a>	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Admin Edit</a>
11506-0005	PB - Hospital/MUHA Outpatient Facility/Radiology (PB)	-	Draft	<a href="#">Send Notification</a>	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Admin Edit</a>
11506-0006	SCTR/Trial Innovation Network (TIN)	-	Draft	<a href="#">Send Notification</a>	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Admin Edit</a>

Completed Forms 8.

SRID	Service Name	Completion Time	View	Edit	Delete
11506-0006	TIN Hub Liaison Team Consultation	11/30/2017			

Milestones (Timeline) 9.

Start Date\*

End Date\*



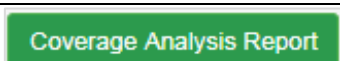

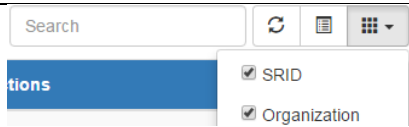




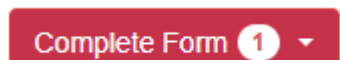
Estimated Recruitment Start Date

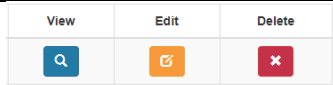
Estimated Recruitment End Date



# SPARC Dashboard

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Section 7. Requests	Description
	Ability to view all requests in a combined view
	Export "Consolidated Corporate Study Budget Report" to excel from here
	Generate a report for coverage analysis purposes
	Ability to add new services or modify existing services an existing protocol; this button will re-route to SPARCRequest homepage; it is only shown to users who are listed on the protocol as an authorized user or overlord
	Toolbox for search, toggle, and column selection(s)
	Ability to send notifications to authorized users and service providers listed on protocol
	Ability to view a specific request
	Ability to edit a specific request; this only shows for users listed on the protocol as an authorized user
	Routes to Admin Edit Page; Please see <a href="#">Part III</a> for more details
	Complete associated forms if required by the service provider

Section 8. Forms	Description
	Ability to view/edit/delete filled out forms

Section 9. Milestones & Timeline	Description
<div data-bbox="219 436 730 724"> <p>Milestones (Timeline)</p> <p><b>Start Date*</b> <input type="text" value="12/19/2017"/></p> <p><b>End Date*</b> <input type="text" value="12/23/2017"/></p> <p><b>Estimated Recruitment Start Date</b> <input type="text"/></p> <p><b>Estimated Recruitment End Date</b> <input type="text" value="12/20/2017"/></p> </div>	<p>Ability to view and edit protocol timeline information</p>

### III. Admin Edit Page

Admin Edit page is accessible to all admin users who have rights to a given protocol, and is where the administrative workflow is performed.

Testing Doc2 > Research Nexus (11506-0002) 10 Notes 0

Status	Owner	Fulfillment	Research Nexus Cost	Total Cost
<input type="text" value="Draft"/>	Not available in draft status.	<input type="button" value="Send to Fulfillment"/>	\$0.00	\$0.00

Request Details | Clinical Services | Non-clinical Services | History | Notifications 0

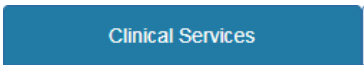
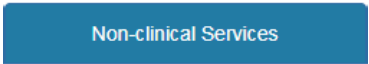
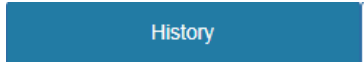
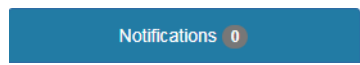
Options


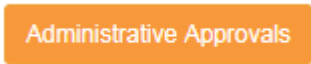

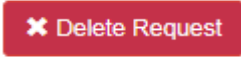

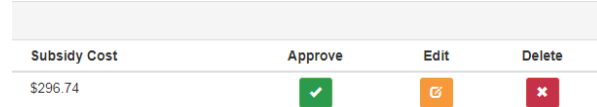
Timeline

Consult Arranged Date  Requester Contacted Date

Section 10. Admin Edit Page Header	Description
<div data-bbox="402 1423 519 1474"> <p>Notes 0</p> </div>	<p>Record of admin notes</p>
<div data-bbox="295 1486 625 1564"> <p>Status</p> <p><input type="text" value="Approved"/></p> </div>	<p>Statuses dropdown list for Admin users to use per workflow</p>
<div data-bbox="295 1577 625 1654"> <p>Owner</p> <p><input type="text" value="---Please Select---"/></p> </div>	<p>Select the responsible admin user for the chosen request</p>
<div data-bbox="349 1667 571 1827"> <p><input type="button" value="Send to Fulfillment"/></p> <p><input type="button" value="Go to Fulfillment"/></p> <p><input type="text" value="Not enabled in SPARCCatalog."/></p> </div>	<p>One-time push to SPARCFulfillment (the green button shows if Fulfillment is enabled in SPARCCatalog; otherwise, the "Not enabled in SPARCCatalog" note shows)</p>



Section 10. Admin Edit Page Header	Description
	Per-patient/per-visit requests are displayed in this tab
	Admin fulfillments for the Study Level Activities can be recorded in this tab
	Request status and approval history are stored in this tab
	Ability to send and receive notifications to authorized users and service provider(s) within the given request

Section 11. Request Details	Description
	Triggers the whole protocol to be sent to Epic; this button only shows up for organizations who offer services in Epic, and for protocols that have been selected to be sent to Epic
	Administrative approval stamps for designated service providers
	Generates an excel report with the request details
	Deletes an entire request; this is an irreversible action
	Timeline information for consultation date and requester contact date
	Approve/Edit/Delete a requested pending subsidy

# SPARCDashboard

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Request Details	Clinical Services <span style="border: 1px solid red; padding: 2px;">12</span>	Non-clinical Services	History	Notifications <span style="border: 1px solid gray; border-radius: 50%; padding: 2px;">0</span>
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Manage Arms  
+ x 📄

Manage Visits  
+ x 📄

Manage Services  
+ x

Template Tab	Quantity/Billing Tab	Consolidated Request Tab
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Clinical Services									
Arm: Screening Phase									
Service Name	Notes	Status	Unit Costs		N	- Day +		Visit 1	
			Service Rate	Your Cost		0	2		
GI (0001)									
HB EGD W ULTRASOUND / FNA - ALTERED ANATOMY (36000087)	<span style="border: 1px solid gray; border-radius: 50%; padding: 2px;">0</span>	Submitted	\$562.00	<a href="#">\$106.78</a>	1	<span style="color: red;">x</span>	<input checked="" type="checkbox"/>		

Section 12: Clinical Services	Description																
<p>Manage Arms  <span style="color: green;">+</span> <span style="color: red;">x</span> <span style="color: orange;">📄</span></p> <p>Manage Visits  <span style="color: green;">+</span> <span style="color: red;">x</span> <span style="color: orange;">📄</span></p> <p>Manage Services  <span style="color: green;">+</span> <span style="color: red;">x</span></p>	<p>Per-patient-per-visit services are managed in the Clinical Services tab; Administrative users are able to add, edit, and delete arms, visits, and services</p>																
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Your Cost</th> <th>N</th> <th></th> <th>- Day + 28 0 0 Screening</th> </tr> </thead> <tbody> <tr style="background-color: #f2f2f2;"> <td></td> <td></td> <td></td> <td style="text-align: center;"><span style="color: green;">✓</span></td> </tr> <tr> <td><a href="#">\$37.62</a></td> <td><a href="#">1</a></td> <td><span style="color: red;">x</span></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> </tr> <tr> <td><a href="#">\$26.03</a></td> <td><a href="#">1</a></td> <td><span style="color: green;">✓</span></td> <td style="text-align: center;"><input type="checkbox"/></td> </tr> </tbody> </table>	Your Cost	N		- Day + 28 0 0 Screening				<span style="color: green;">✓</span>	<a href="#">\$37.62</a>	<a href="#">1</a>	<span style="color: red;">x</span>	<input checked="" type="checkbox"/>	<a href="#">\$26.03</a>	<a href="#">1</a>	<span style="color: green;">✓</span>	<input type="checkbox"/>	<p>Admin users can change “Your Cost” rates as agreed upon; Admin users can also change the subject count “N” for each service within the template tab, and modify the selection of services</p>
Your Cost	N		- Day + 28 0 0 Screening														
			<span style="color: green;">✓</span>														
<a href="#">\$37.62</a>	<a href="#">1</a>	<span style="color: red;">x</span>	<input checked="" type="checkbox"/>														
<a href="#">\$26.03</a>	<a href="#">1</a>	<span style="color: green;">✓</span>	<input type="checkbox"/>														
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="3">- Day + 28 0 0 Screening</th> </tr> <tr style="background-color: #f2f2f2;"> <th>R</th> <th>T</th> <th>%</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">0</td> <td style="text-align: center;">0</td> </tr> <tr> <td style="text-align: center;">0</td> <td style="text-align: center;">2</td> <td style="text-align: center;">0</td> </tr> </tbody> </table>	- Day + 28 0 0 Screening			R	T	%	1	0	0	0	2	0	<p>Users are able to change the requested quantity of research “R” and third party “T” on the quantity/billing tab</p>				
- Day + 28 0 0 Screening																	
R	T	%															
1	0	0															
0	2	0															



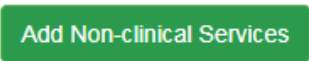
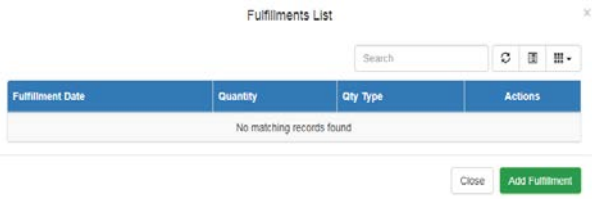
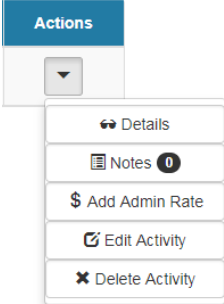
# SPARCDashboard

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Request Details	Clinical Services	<b>Non-clinical Services</b> <span style="border: 1px solid red; padding: 2px;">13</span>	History	Notifications <span>0</span>
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Add Non-clinical Services Search  ↻ 📄 ☰

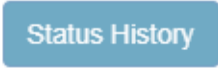

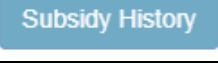
	Service	Qty Requested	Qty Type	Cost	In Process	Complete	Actions
List	Biostatistical Education	1	Hours	\$0.00			⌵

Section 13: Non-Clinical Services	Description
	Admin users are able to add Non-Clinical services (i.e. consultations) in the Non-Clinical Services Tab
	Admin users are able to fulfill a service within the Non-Clinical Services Tab
	Admin users can view Non-Clinical Service details; line-item notes; add an administrative rate; and edit or delete an activity

Request Details	Clinical Services	Non-clinical Services	<b>History</b> <span style="border: 1px solid red; padding: 2px;">14</span>	Notifications <span>0</span>
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Status History Search  ↻ 📄 ☰

Date Changed	Status Changed From	Status Changed To	Changed by
No matching records found			

Section 14: History	Description
	Tracks and displays the time, date and the person who made changes to the status of a request
	Displays the administrative approval changes
	Displays previously approved subsidy information

# SPARCDashboard

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Request Details | Clinical Services | Non-clinical Services | History | Notifications 0 15

Send Notification

User	Subject	Time
No matching records found		

Section 15: Notifications	Description
<input type="button" value="Send Notification"/>	Send Notification to authorized users and service providers within the system
<input type="button" value="Mark as Unread"/> <input type="button" value="Mark as Read"/>	Mark a notification as unread/read
<input type="button" value="Inbox"/> <input type="button" value="Sent"/>	Switch to Inbox or Sent view