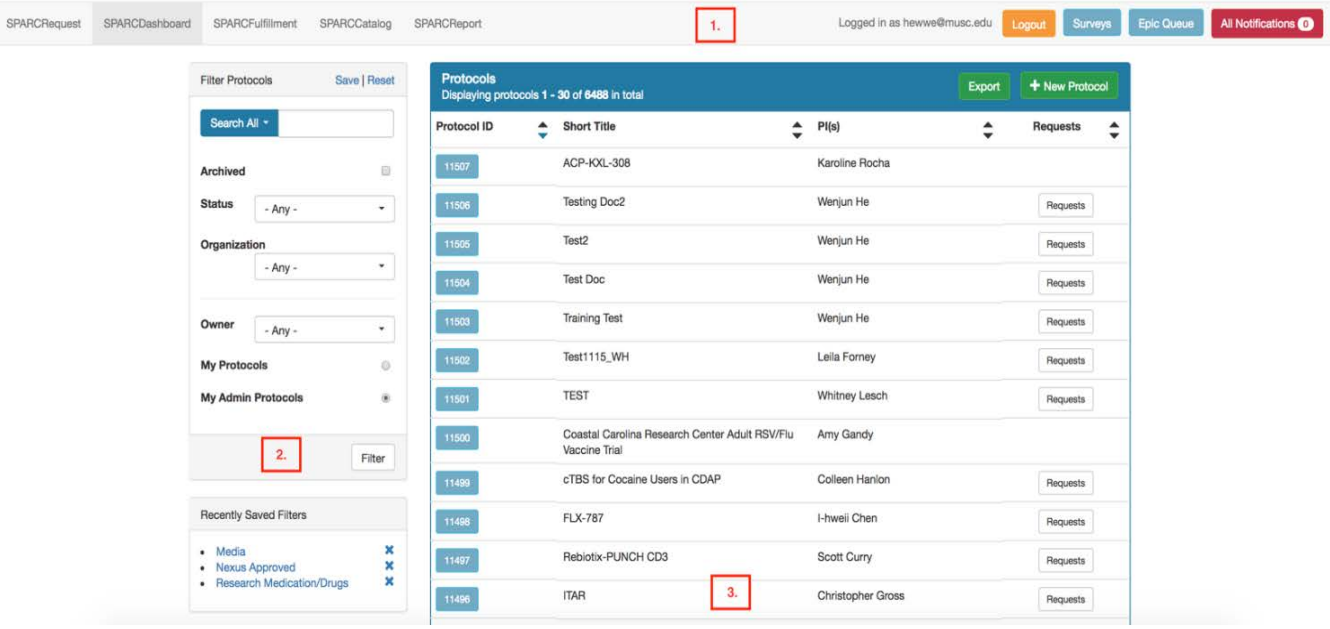
SPARCDashboard Step-By-Step Training Guide

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.

I. Homepage

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



Section 1. Navigation Bar	Description
SPARCRequest SPARCDashboard SPARCFulfillment SPARCCatalog SPARCReport	Navigation buttons to other SPARC modules
Epic Queue	View/Manage protocols that are being queued to send to Epic
Surveys	Link out to the Survey Builder page
All Notifications 2	Notification center

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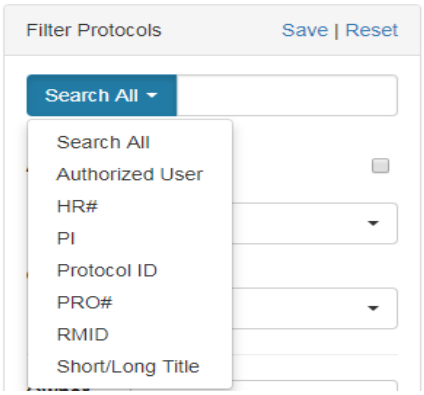
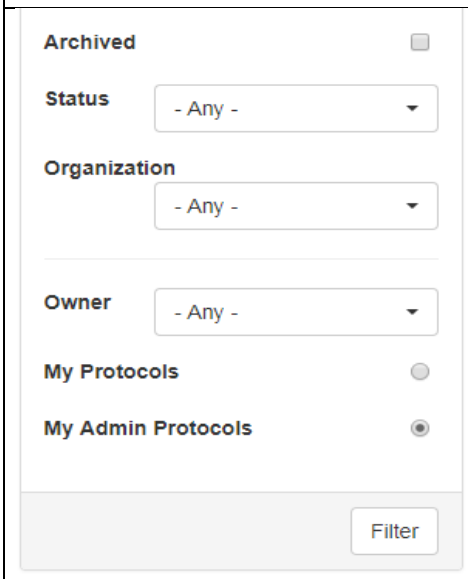
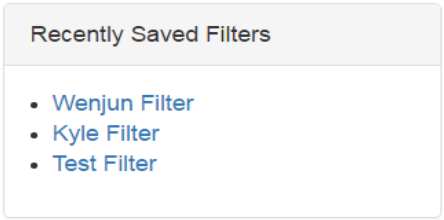
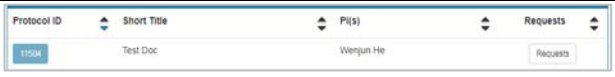
Section 2. Protocol Filters	Description
	Save the current filter as a favorite or reset the entered contents to start over
	Free text search using one of the options, or using the default “Search All”
	Show archived protocols
	Filter by request statuses
	Dropdown list showing all of the organizations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

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

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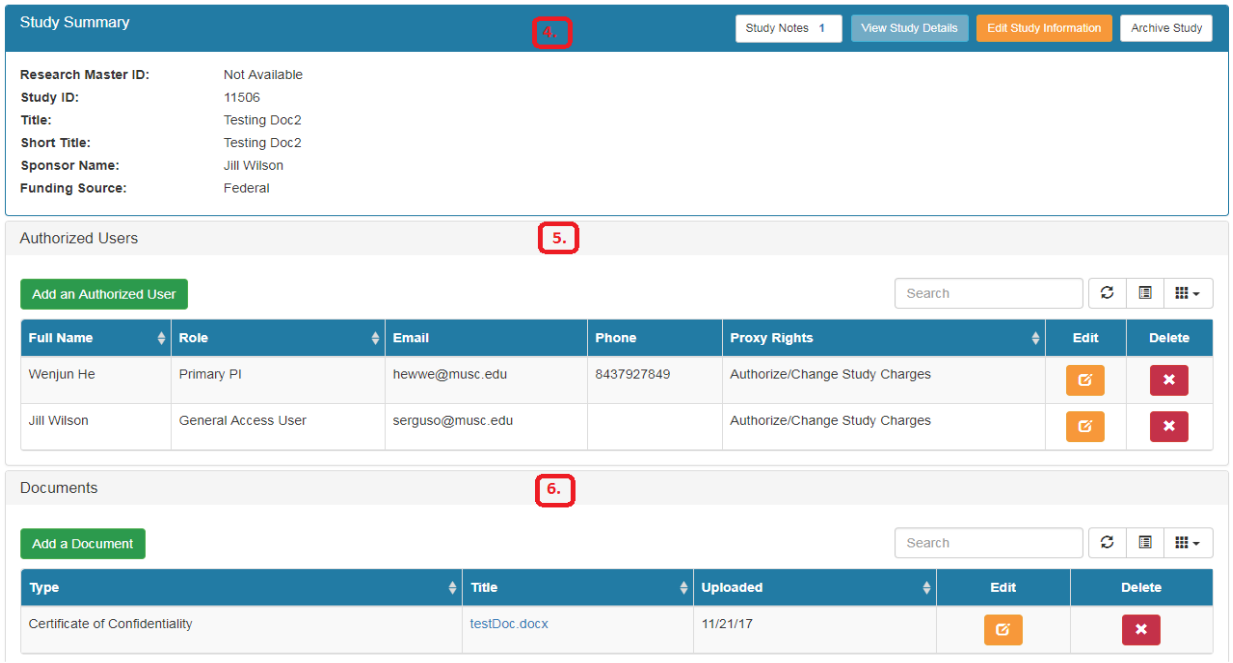
Section 3. Protocol List	Description
Requests	Shows a snapshot of protocol in a popup window
Export	Generates an excel report with the displayed protocols
+ New Protocol	Create a new study/ project

II.Protocol Page

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



Section 4. Study Summary	Description
Study Notes 1	Protocol level notes
View Study Details	Ability to view previously entered protocol information
Edit Study Information	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
Archive Study	Archives the study/project

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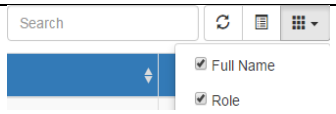
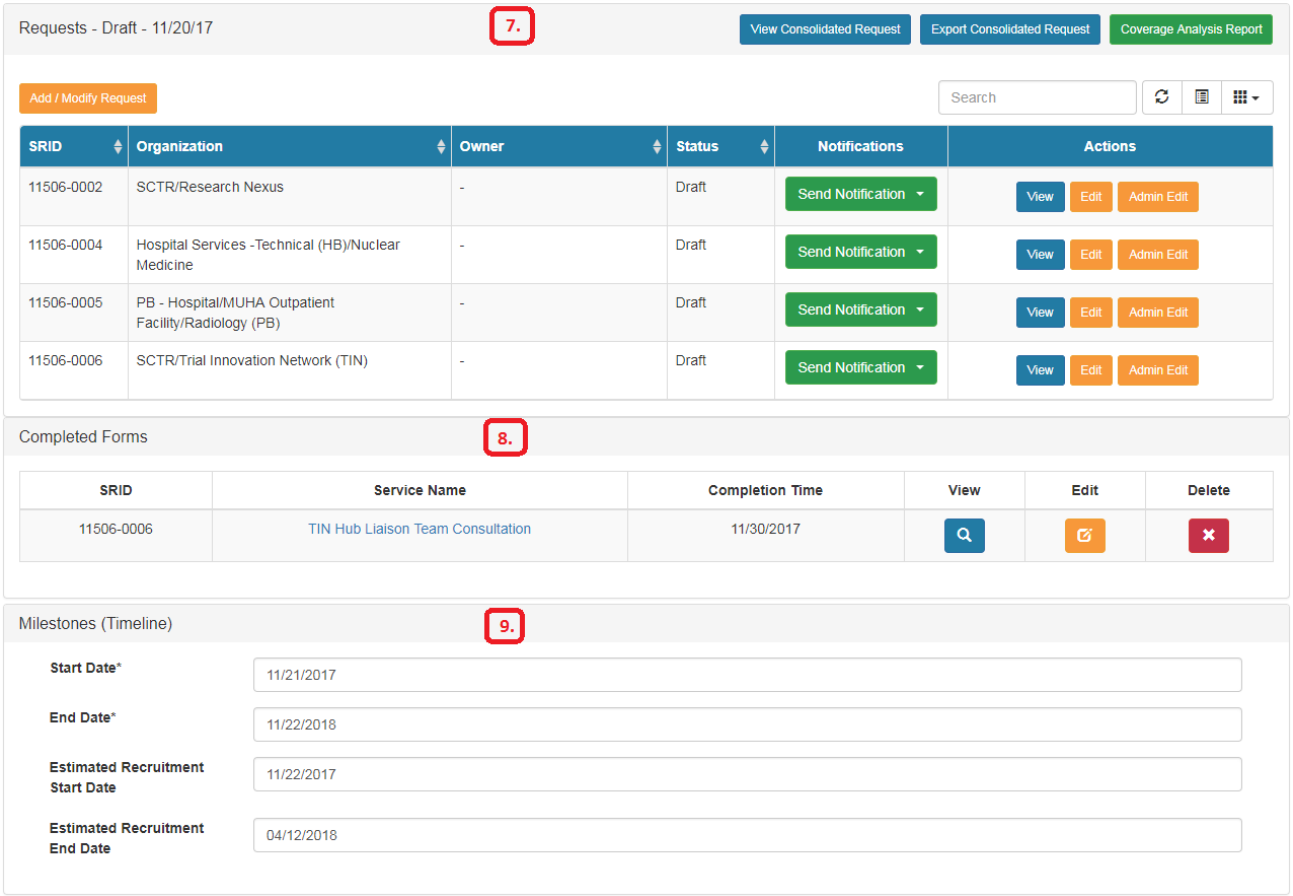
Section 5. Authorized Users	Description
Add an Authorized User	Ability to add authorized users
	Ability to edit authorized users
	Ability to delete authorized users
	Toolbox for search, toggle, and column selection(s)

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



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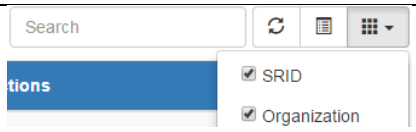
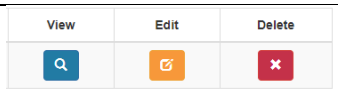
Section 7. Requests	Description
View Consolidated Request	Ability to view all requests in a combined view
Export Consolidated Request	Export “Consolidated Corporate Study Budget Report” to excel from here
Coverage Analysis Report	Generate a report for coverage analysis purposes
Add / Modify Request	Ability to add new services or modify existing services an exisiting 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)
Send Notification	Ability to send notifications to authorized users and service providers listed on protocol
View	Ability to view a specific request
Edit	Ability to edit a specific request; this only shows for users listed on the protocol as an authorized user
Admin Edit	Routes to Admin Edit Page; Please see **Part III** for more details
Complete Form 1	Complete associated forms if required by the service provider

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

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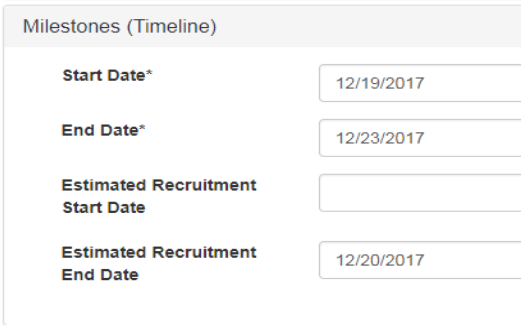
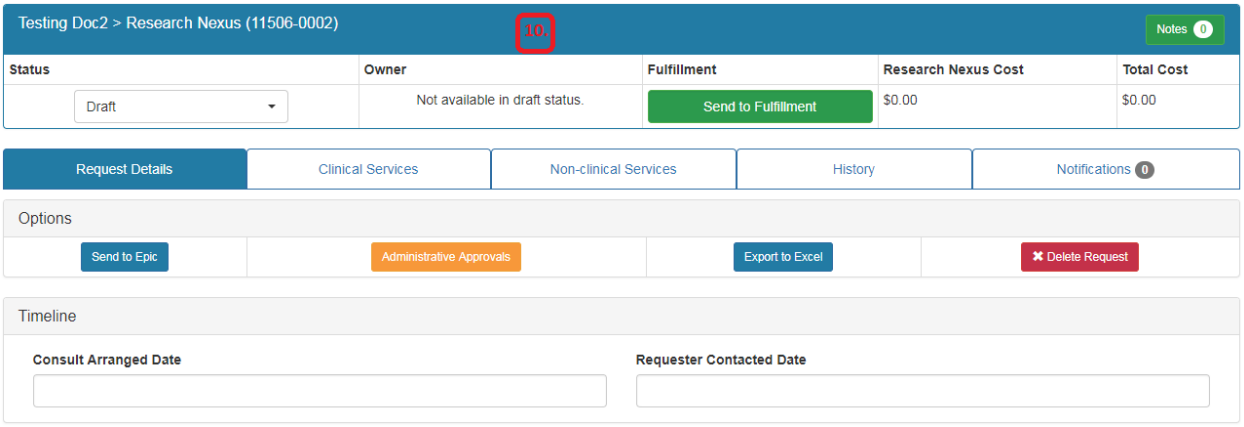
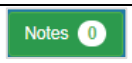
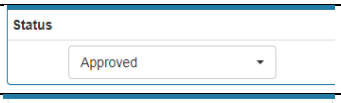
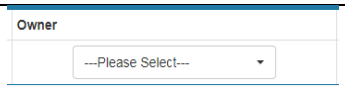
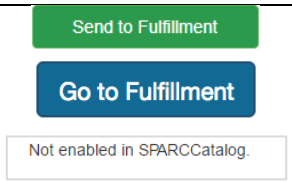
Section 9. Milestones & Timeline	Description
	Ability to view and edit protocol timeline information

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.



Section 10. Admin Edit Page Header	Description
	Record of admin notes
	Statuses dropdown list for Admin users to use per workflow
	Select the responsible admin user for the chosen request
	One-time push to SPARCFulfillment (the green button shows if Fulfillment is enabled in SPARCCatalog; otherwise, the “Not enabled in SPARCCatalog” note shows)

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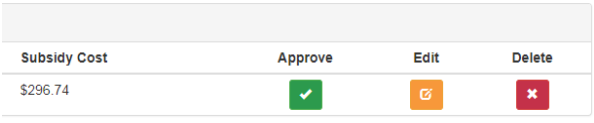
Section 10. Admin Edit Page Header	Description
Clinical Services	Per-patient/per-visit requests are displayed in this tab
Non-clinical Services	Admin fulfillments for the Study Level Activities can be recorded in this tab
History	Request status and approval history are stored in this tab
Notifications 0	Ability to send and receive notifications to authorized users and service provider(s) within the given request

Section 11. Request Details	Description
Send to Epic	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 Approvals	Administrative approval stamps for designated service providers
Export to Excel	Generates an excel report with the request details
✖ Delete Request	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

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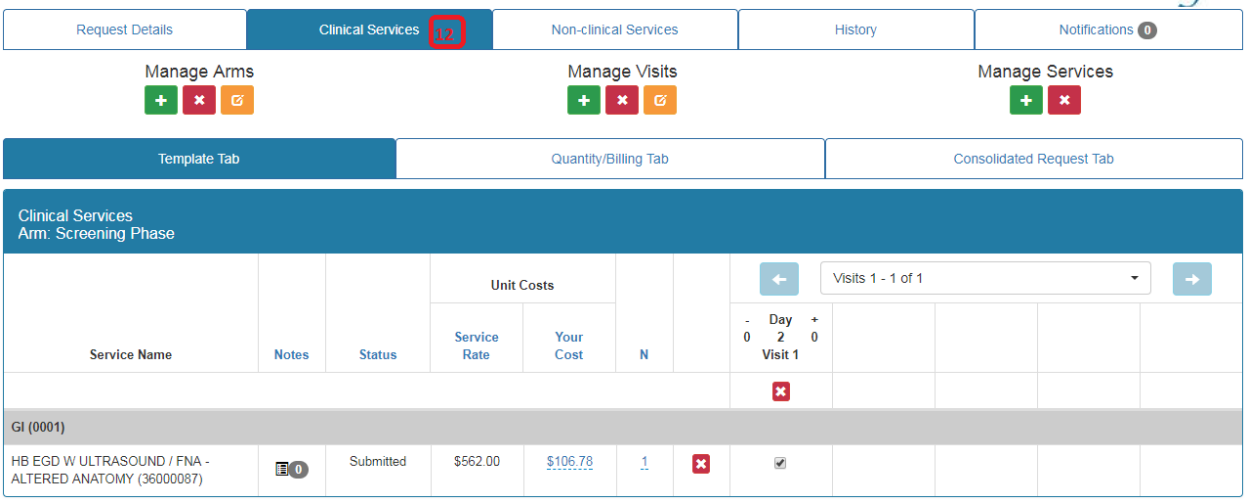
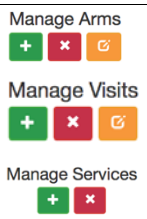
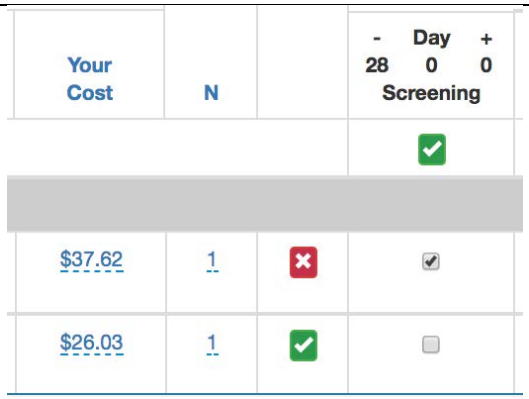
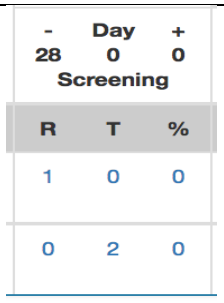


Section 12: Clinical Services	Description
	Per-patient-per-visit services are managed in the Clinical Services tab; Administrative users are able to add, edit, and delete arms, visits, and services
	Admin users can change “Your Cost” rates as agreed upon; Admin users can also change the subject count “N” for each service within the template tab, and modify the selecton of services
	Users are able to change the requested quantity of research “R” and third party “T” on the quantity/billing tab

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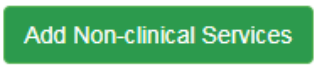
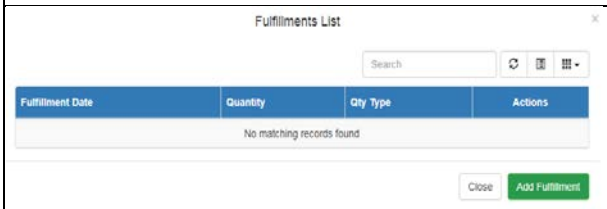
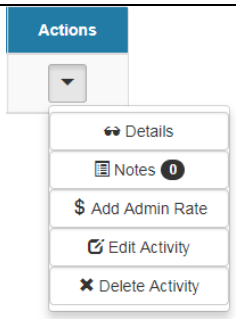
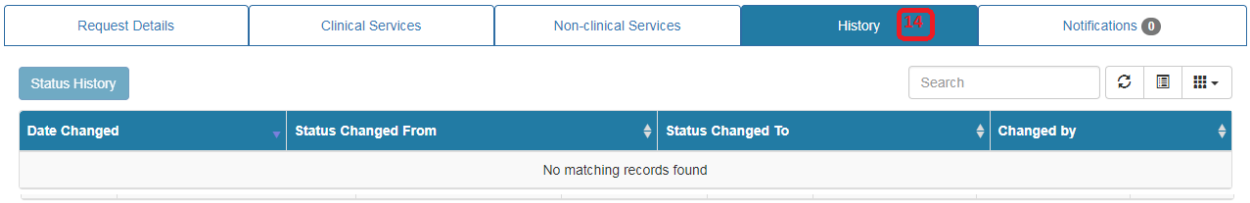
Section 13: Non-Clinical Services	Description
	Admin users are able to add Non-Clinical services (i.e. consultations) in the Non-Clinical Services Tab
	Admin users are able to fulfill a service within the Non-Clinical Services Tab
	Admin users can view Non-Clinical Service details; line-item notes; add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



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

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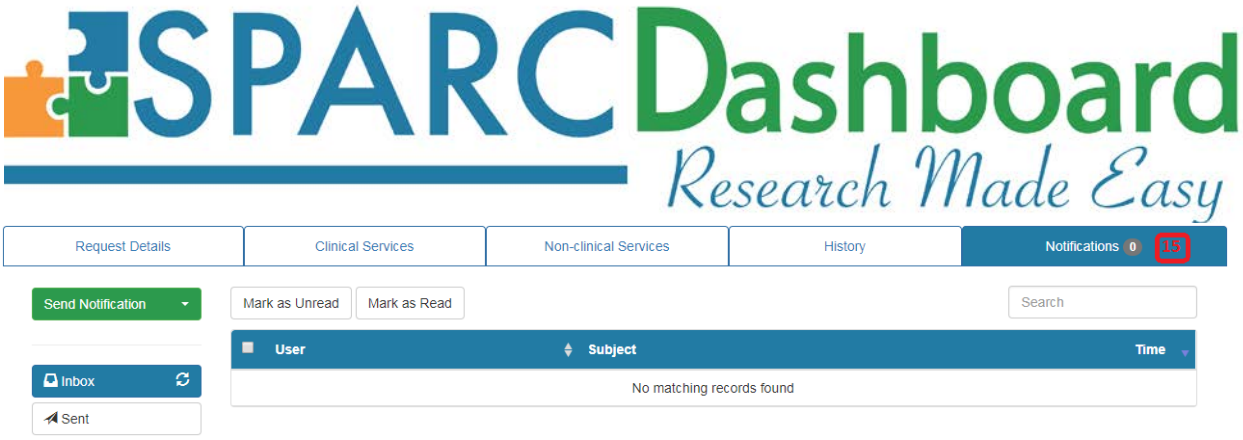

Section 15: Notifications	Description
Send Notification	Send Notification to authorized users and service providers within the system
Mark as Unread Mark as Read	Mark a notification as unread/read
Inbox Sent	Switch to Inbox or Sent view

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