

Checklist for Iron Mountain using Oncore

- Review Trial Activation/Updates List for newly terminated trials.
- Print accrual list from Oncore which includes all patients consented to the trial.
- Contact data specialist and regulatory specialist to do final review of charts and documents for termination.
- After data specialist's final review, retrieve and box charts from accrual list obtained from Oncore. Check off charts that will be sent to Iron Mountain.
 - When applicable, request charts from affiliates and regional sites to compile all charts together.
 - If charts are missing, send a message to administrative assistant to alert the CTU to find the charts.
 - Obtain any ineligible patient charts, consent forms, or other documents regarding the trial and box.
- Complete Iron Mountain transmittal sheet as follows:
 - Customer ID: **[Insert Customer ID]**
 - Customer Name: **UHCMC**
 - Division ID: leave blank
 - Department ID: **[Insert Department ID]**
 - Affix a barcode label sticker
 - Major/minor description should have protocol numbers
 - Preparer's Name: 'your name'
 - Date
 - Division ID: leave blank
 - Department ID: **[Insert Department ID]**
 - Telephone number and extension: 'your phone number'
 - Floor: **[Insert floor]**
- If storage is an issue, put completed boxes in storage room, left of the monitoring room. Boxes that are not full or incomplete, store appropriately in chart room to continue filing.
- Enter box numbers assigned into Oncore.
 - In PC Console → Documents/Info → Archive/Notes, click update.
 - Click Add, complete form with date of archive (date box completed), archive type, location is **Iron Mtn.**, box number (must be filled out!), description of contents (i.e. patient charts, include what is missing or select charts that are in a mixed protocol box)
- Contact Iron Mountain at 1(800)934-3453. They will ask how to access the building.
Our address is: **[Insert Address]**
- Make a copy of transmittal form(s) and give to administrative assistant for filing. The original is given to Iron Mountain personnel.