

Penn+Box – Study Tracking Logs – Guidance Sheet

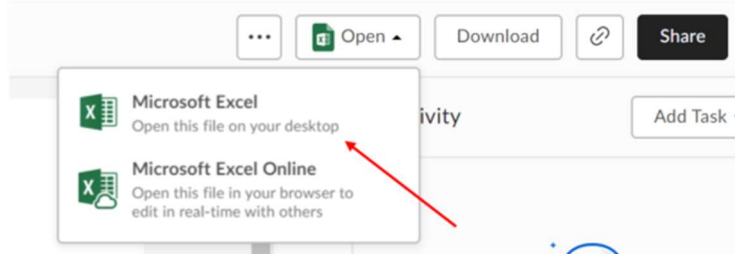
Central Research Services

This guidance sheet serves as an instructional tool for those responsible for Penn+Box submissions and the Tracking Log Process.


Positions Involved: Principal Investigators, Project Manager, Study Coordinator/Clinical Research Coordinator, CRS – Grants Coordinator, CRS – Grants Manager, Research Administrative Coordinator

PENN+BOX

1. Log into Penn+Box (<https://upenn.account.box.com/login>) using your PennKey and Password.
2. Open folder and tracking log spreadsheet.
3. You can update tracking logs using one of three options:

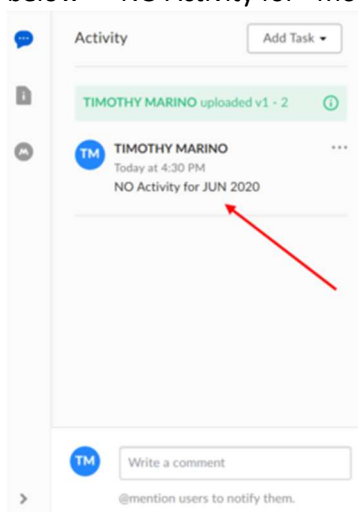


- a. Open Microsoft Excel to your desktop – **RECOMMENDED** - this requires you to Install Box Tool – Once Excel opens all you need to do is update the log and save the file. This will save directly to Penn+Box (this is an allowable download on all PENN systems – if trouble, contact IT) - Also, multiple staff **CAN** work on the document simultaneously with all updates being saved.
 - b. Microsoft Excel Online - Open Excel directly in the browser
 - c. Download the file – **DO NOT DOWNLOAD** We cannot have separate files on computers used by multiple study team personnel. Multiple uploads will overwrite files and information will be lost.
4. After each save, all participants will receive an email communicating the user and revision timestamp. This is necessary to track users and version history. All users with access will be able to view version history in the event of a problem.

Name	Updated ▾	Size	⋮	➤
 Subject Tracking Log.xlsx	Today by TIMOTHY ...	7.5 KB	⋮	➤

TRACKING LOGS

- IF you do not have “any” activity for a particular month, please use the Comment Box under activity as seen below – “NO Activity for <Month, Year>”



- Format of the Tracking Logs have not changed. Logs will be uploaded by Central Research Services (CRS) for use. Microsoft Excel Spreadsheet will have a tab for each study in each file (per study team or per coordinator as requested by the divisions) plus a sheet for monthly comments if needed.
- Submission times of the Tracking Logs have not changed. All tracking for the recently closed month is needed by the 3rd business day of the following month. (ie: 07/06/20, 08/05/2020, 09/03/2020, 10/05/2020, 11/04/2020, and 12/03/2020)

REQUIREMENTS


- Full Subject Numbers and Subject Initials are needed for all subjects; enrolled and screen failed.

	Screening	Vi
	< 7 Days before Day 1	D
Subject #	2,815	
1234-001 TJM		

A red arrow points from the bottom right towards the subject number '1234-001 TJM' in the first row of the data section of the table.

9. New Date data entered will appear in the **RED** on the spreadsheet for clear additions to the CRS team. (Returns from CRS will change the color to BLACK and Gray filled cell)

	Screening	Visit 2	Visit 3
	< 7 Days before Day 1	Day	Week
Subject #	2,815	3,263	3,061
1234-001 TJM	6/25/2020	7/2/2020	7/8/2020



10. All invoiced items, IND Report #'s, and Regulatory activity should also be reflected as above

AFTER MONTHLY SUBMISSIONS

- CRS documents new tracking activity on business days 4-6 of the new month. This should not hold up any study teams that have new data to add for those days. We just won't record it into the previous month. Also just to clarify, study teams will receive the same notification from Penn+Box that a designee from CRS has reviewed and revised the tracking log.
- CRS will add new studies and items / milestones related to amendments within seven (7) days of contract execution which could be at any time in the month. This is another reason why it is not recommended that the Download option be used.
- Any queries related to the tracking logs and study activity will be conducted via email at this time. These queries could include missing dates for subjects, discontinued subjects, regulatory, unscheduled visit activity, etc

If you have any questions relating to access or use of Penn+Box, please contact Tim Marino (timothy.marino@pennteam.upenn.edu)