

## Study Patient Roster

Users tasked with Patient Management duties may change their homepage to the Study Patient Roster to streamline patient management tasks. Once the default homepage has been changed to the Study Patient Roster, users can manage patient records via the Roster page. Some functions are more directly accessible from the default homepage, such as recording patient form responses and viewing patients associated to all accessible studies during a patient search.

## Add Patients

Once the associated study patients display for a searched study, if the desired patient does not appear, click **Add Patient**. The Patient Enrollment Form opens where users can define as appropriate.

## Search Patients on a Study

Before adding a new patient, search for a patient record via the Search Patients on a Study field.

*Note: This field searches by study number and displays Patients associated to the Study.*

The screenshot shows the 'Study Patient Roster' interface. At the top, there is a search bar labeled 'Search Patients on a Study:' with the value '09877'. To the right, there is a button labeled 'Add Patient' under the heading 'Add Patients to Study:'. Below the search bar is a table titled 'Patient List :'. The table has columns: Patient Study Id., First Name, Last Name, Enrolled Date, Enrolling Site, Current Status, Assigned To, Last Visit, and Next Due. The table contains five rows of patient data.

Patient Study Id.	First Name	Last Name	Enrolled Date	Enrolling Site	Current Status	Assigned To	Last Visit	Next Due
00001	Samantha	Hazel		Benton Medical	Enrolled			
0000-44445	Charlotte	Herbinger		WCG - VELOS	Screening			
MRN2876	May	Owens		WCG - VELOS	Enrolled			
00005	Donna	Beckster		WCG - VELOS	Enrolled			
0000-44444	Jessica	Bilger		WCG - VELOS	Enrolled		Follow-up and ...	

## Manage Patient Status

The current status displays for the patient once a study patient search is completed. To change the patient status, click the status link to modify.

The screenshot shows the 'Patient Study Status' form. It includes fields for Patient ID (MRN01111), Study Number (484744), Status (Enrolled), Reason (Select an option), Status Date (02/20/2020), a checkbox for 'This is patient's current status in this study', and a Notes field.

## Study Patient Roster (continued)

Study Patient Roster

Search Patients on a Study: 09877

Add Patients to Study: Add Patient

Patient List : Jessica Bilger Selected

	Patient ID	First Name	Last Name
<input type="checkbox"/>	00001	Samantha	Hazel
<input type="checkbox"/>	0000-44445	Charlotte	Herbinger
<input type="checkbox"/>	MRN2876	May	Owens
<input type="checkbox"/>	00005	Donna	Beckster
<input checked="" type="checkbox"/>	0000-44444	Jessica	Bilger
<input type="checkbox"/>	MRN465	Iris	Maloney

Visit List for Jessica Bilger

Edit Calendar/Date Edit Multiple Events Event Power Bar

Visit	Scheduled Date	Event Name	Event Status	Status Date
<input type="text"/>				

### Generate a Patient Visit Schedule

If a patient does not already have a schedule associated with them, once a patient is selected, click the **Edit Calendar/Date** button.

Treatment Details

The following fields must be filled in order to generate a schedule for the patient and track events.

Study Calendar PP Cal with forms ▼  
Select the specific Study Calendar that the patient is assigned to for this study

Patient Start Date 06/18/2020  
Patient's schedule will be generated based on this start date.

☒ Calculate Schedule from the First Visit of the Calendar Template  
☐ Calculate Schedule from a Visit other than the First Visit of the Calendar Template Select a Visit

Selected Visit  [Read Only]

e-Signature \*  Submit

The Treatment Details page allows you to associate an active Study Calendar, Patient Start Date, and define which visit starts the calculated schedule.

*Note: A calendar must be active and associated to a study to manage a patient schedule.*

## Study Patient Roster (continued)

### Patient Schedules

From the Study Patient Roster, after a successful study patient search, select the checkbox next to the Patient Name.

The Patient Visit List displays.

**Study Patient Roster**

Search Patients on a Study: 09877

Add Patients to Study: Add Patient

**Patient List : Jessica Bilger Selected**

	Patient Study	First Name	Last Name
<input type="checkbox"/>	00001	Samantha	Hazel
<input type="checkbox"/>	0000-44445	Charlotte	Herbinger
<input type="checkbox"/>	MRN2876	May	Owens
<input type="checkbox"/>	00005	Donna	Beckster
<input checked="" type="checkbox"/>	0000-44444	Jessica	Bilger
<input type="checkbox"/>	MRN465	Iris	Maloney

1 of 6 items

**Visit List for Jessica Bilger**

Edit Calendar/Date Edit Multiple Events Event Power Bar

	Visit	Scheduled Date	Event Name	Event Status	Status Date	Coverage
<input type="checkbox"/>	Initial Visit	+Unsch				
<input type="checkbox"/>	Follow-up and Labs	+Unsch				
<input checked="" type="checkbox"/>	Follow-up and Labs	01/14/2020	Genetic Assay	Done	12/09/2019	R
<input checked="" type="checkbox"/>	Follow-up and Labs	01/14/2020	Follow Up	Past Scheduled Date	11/03/2021	Q0
<input type="checkbox"/>	Follow-up Visit 1	+Unsch				
<input type="checkbox"/>	Lab Follow Up	+Unsch				
<input type="checkbox"/>	Follow-up Visit 2	+Unsch				

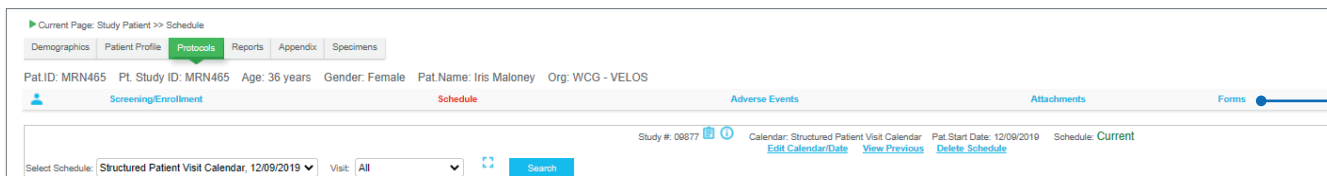
### Edit Multiple Events

To change the status of multiple events within one or more visit(s) simultaneously, click **Edit Multiple Events**.

*Note: Always review your patient's schedule for accuracy. If missing events, contact your study administration team to request those events be added to the calendar before proceeding. See the study management section of the user guide for more information about updating active calendars.*

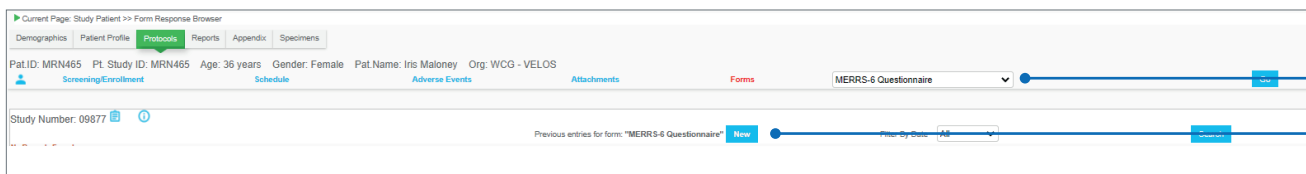
After defining, the patient schedule generates. Use the **+Unsch** button to add an event to the visit or schedule an unscheduled event.

## Patient Forms

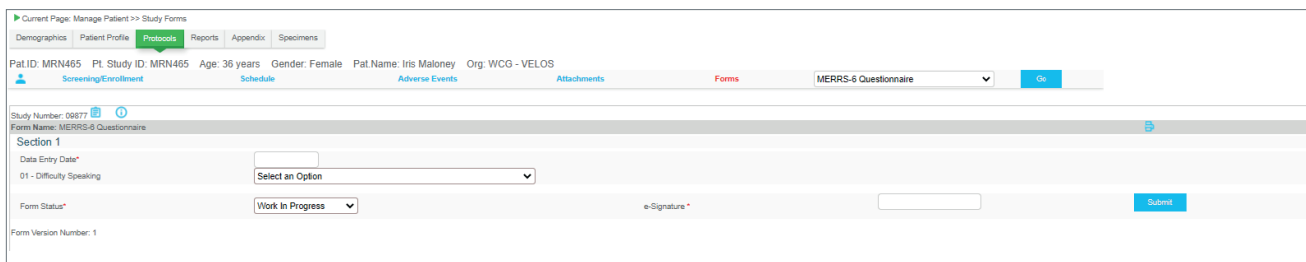


Patient Forms are patient related data collection tools used to collect additional information. Examples of patient forms could be patient evaluation forms, or forms used to collect patient medical history.

To manage Patient Forms, navigate to the study patient **Protocols** tab from the default homepage and select the **Forms** link.



Select a form category from the dropdown menu. Click **New**.



The **Manage Patient Study Forms** page displays. Enter information as appropriate.

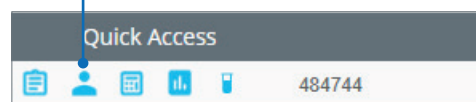
*Note: In order for study patient forms to appear, they have to be active and linked to patients in the Associated Forms section of the Study Setup tab for a study.*

## Adverse Events

### Access Adverse Events

From the Study Patient Roster, click the home button to access the default homepage.

Click the Patient Management icon in Quick Access to view enrolled patients.



Click on a Patient Study ID to access the **Protocols** tab, then click the **Adverse Events** link.

Current Page: Study Patient >> Adverse Event Browser

Demographics Patient Profile **Protocols** Reports Appendix Specimens

Pat.ID: MRN465 Pt. Study ID: MRN465 Age: 36 years Gender: Female Pat.Name: Iris

Screening/Enrollment Schedule **Adverse Events** Attachments Forms

Study Number: 09877

Reported adverse events are as follows:

Adverse Event Type	Adverse Event/Grading	Attribution	Start Date	Stop Date	Entered By	AE Status	Delete
<a href="#">Adverse Event</a>	Grade: 3 -	-	01/18/2021	-		Completed	<a href="#">Add New AE</a> <a href="#">Add Multiple AE's</a>

### Add Adverse Event(s)

Users may add a single adverse event (AE) using the **Add New AE** link, or **Add Multiple AE's** at once. From the patient **Protocols** tab in eResearch Enterprise, permitted users may use an adverse event dictionary that was defined on the **Study Setup** tab during Study Management, to record patient adverse events.

Current Page: Manage Patient >> Adverse Event Details

Demographics Patient Profile **Protocols** Reports Appendix Specimens

Pat.ID: MRN465 Pt. Study ID: MRN465 Age: 36 years Gender: Female Pat.Name: Iris Maloney Org: WCG - VELOS

Screening/Enrollment Schedule **Adverse Events** Attachments Forms

☐ Congenital Anomaly  
☐ Required Intervention  
☐ Recovered

Action: Select an Option

Recovery Description: Select an Option

Outcome Notes: 4000 characters left

**Adverse Event - More Details**

AE Status: Select an Option

e-Signature: Enter e-Signature **Submit**

### Edit Adverse Event Details

The Adverse Event page displays. Define as appropriate and **Submit** with your e-Signature.

*Note: Adverse Events are only available in Enterprise.*