

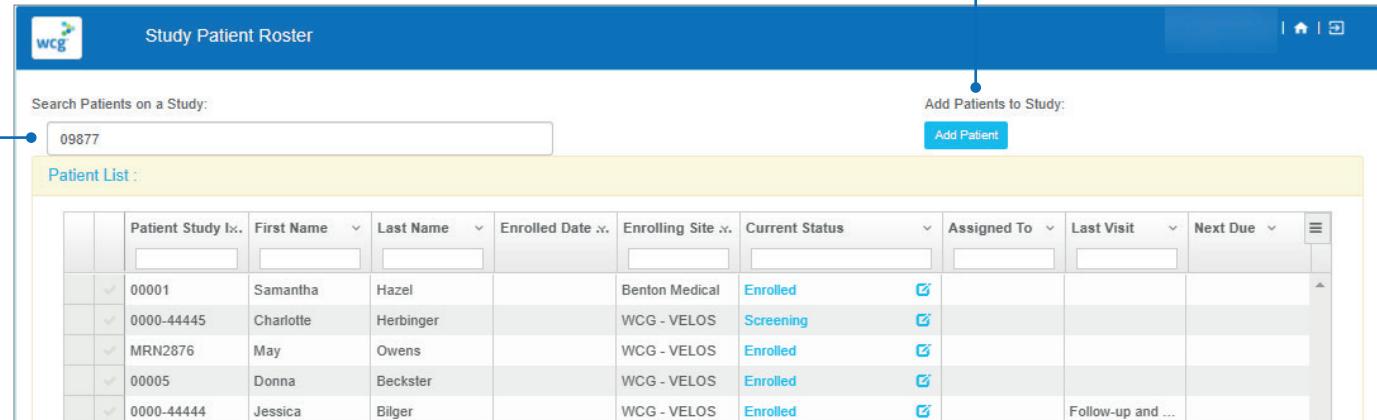
## Study Patient Roster

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.

### Search Patients on a Study

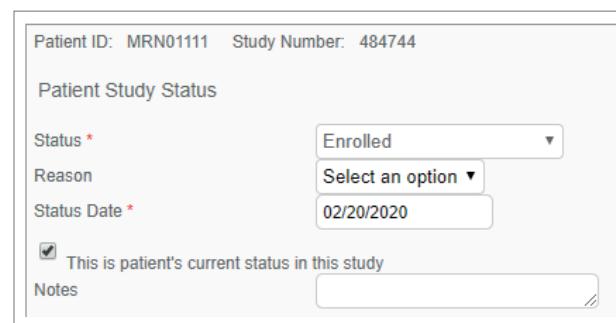
Before adding a new patient, search for a patient record via the Search Patients on a Study field.

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



The screenshot shows the 'Study Patient Roster' page. At the top, there is a search bar labeled 'Search Patients on a Study:' with the value '09877'. To the right of the search bar is a button labeled 'Add Patients to Study:' with a 'Add Patient' link. Below the search bar is a table titled 'Patient List' with 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 data.

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



The screenshot shows a 'Patient Study Status' form. It includes fields for 'Status \*' (dropdown menu showing 'Enrolled'), 'Reason' (dropdown menu showing 'Select an option'), 'Status Date \*' (date input field showing '02/20/2020'), and a checkbox 'This is patient's current status in this study'. There is also a 'Notes' text area.

Patient ID: MRN01111 Study Number: 484744

Patient Study Status

Status \* Enrolled

Reason Select an option

Status Date \* 02/20/2020

This is patient's current status in this study

Notes

### 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.

### 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.

Study Patient Roster (*continued*)

Study Patient Roster

Search Patients on a Study: 09877

Patient List : Jessica Bilger Selected

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

Add Patients to Study: Add Patient

Visit List for Jessica Bilger

	Visit	Scheduled Date	Event Name	Event Status	Status Date

**Edit Calendar/Date**

**Edit Multiple Events**

**Event Power Bar**

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

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

Selected Visit:  [Read Only]

e-Signature \*

**Submit**

## 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.

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

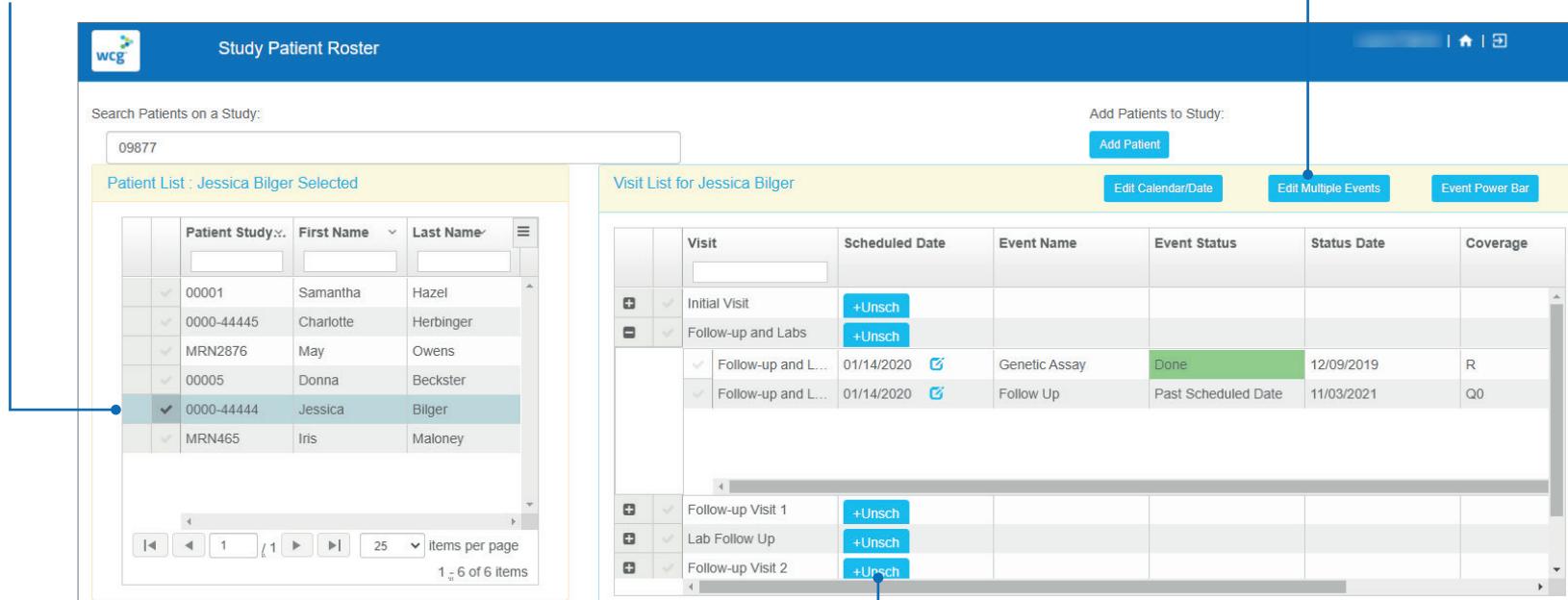
*Note: A calendar must be active and associated to a study to manage a patient schedule.*

## 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.



The screenshot shows the 'Study Patient Roster' interface. On the left, the 'Patient List' for 'Jessica Bilger Selected' is displayed, showing patient details like ID, First Name, and Last Name. On the right, the 'Visit List for Jessica Bilger' is shown, listing visits such as 'Initial Visit', 'Follow-up and Labs', 'Follow-up and L...', 'Follow-up Visit 1', 'Lab Follow Up', and 'Follow-up Visit 2'. Each visit row contains a blue button labeled '+Unsch' for adding events.

Visit	Scheduled Date	Event Name	Event Status	Status Date	Coverage
Initial Visit	+Unsch				
Follow-up and Labs	+Unsch				
Follow-up and L...	01/14/2020	Genetic Assay	Done	12/09/2019	R
Follow-up and L...	01/14/2020	Follow Up	Past Scheduled Date	11/03/2021	Q0
Follow-up Visit 1	+Unsch				
Lab Follow Up	+Unsch				
Follow-up Visit 2	+Unsch				

*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.*

### Edit Multiple Events

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

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



## Patient Forms

► Current Page: Study Patient >> Schedule

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**

Study #: 09877 | Calendar: Structured Patient Visit Calendar | Pat Start Date: 12/09/2019 | Schedule: Current

Edit Calendar/Date | View Previous | Delete Schedule

Select Schedule: Structured Patient Visit Calendar, 12/09/2019 | Visit: All |

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.

► Current Page: Study Patient >> Form Response Browser

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**

Study Number: 09877 | MERRS-6 Questionnaire

Previous entries for form: "MERRS-6 Questionnaire" |  |

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

► Current Page: Manage Patient >> Study Forms

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** | MERRS-6 Questionnaire |

Study Number: 09877 | Form Name: MERRS-6 Questionnaire

Section 1

Data Entry Date\* |

01 - Difficulty Speaking |

Form Status\* |

Form Version Number: 1 |

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

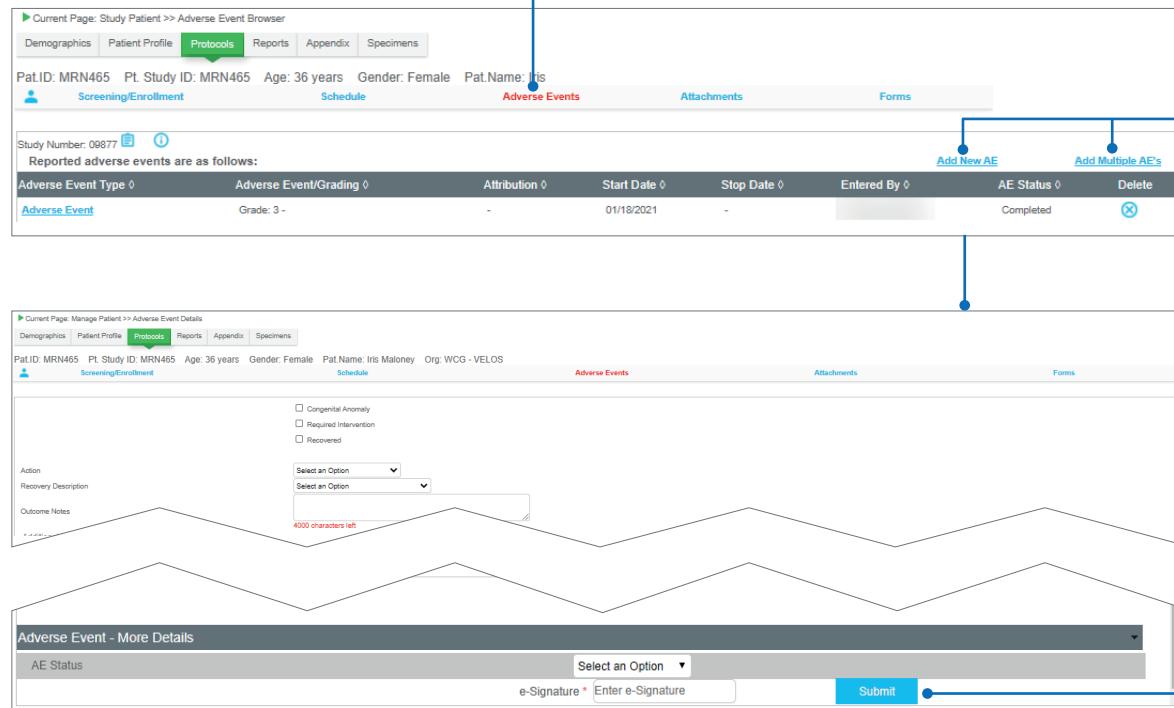
*Note: In order for study patient forms to appear, they have to be active and linked to patients in the Associated Forms section of the Study Setup tab for a study.*

## 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.



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
Adverse Event	Grade: 3 -	-	01/18/2021	-		Completed	X

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

Action Recovery Description

Outcome Notes

4000 characters left

Adverse Event - More Details

AE Status: Select an Option

e-Signature \* Enter e-Signature

Submit

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

### 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, permissioned users may use an adverse event dictionary that was defined on the **Study Setup** tab during Study Management, to record patient adverse events.

### 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.*