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.

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)*

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.
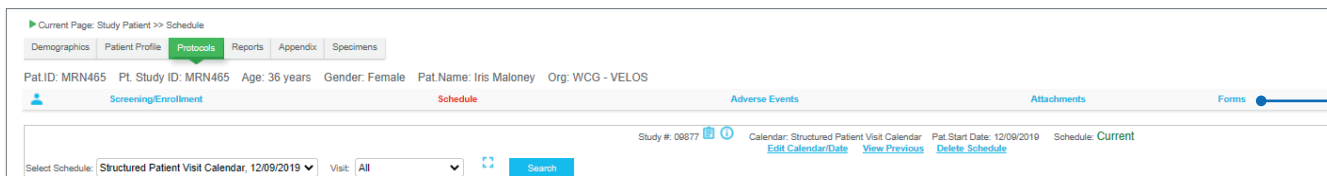
The Patient Visit List displays.

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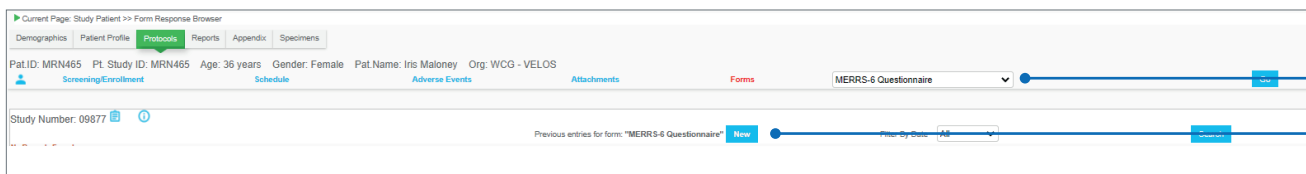
After defining, the patient schedule generates. Use the **+Unsch** button to add an event to the visit or schedule an unscheduled event.
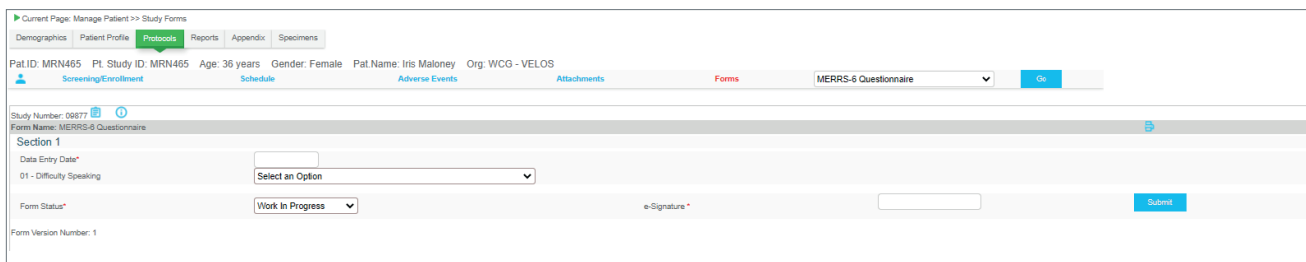
Patient Forms

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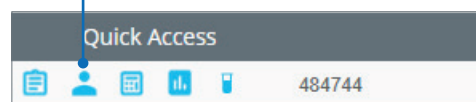
Note: In order for study patient forms to appear, they have to be active and linked to patients in the Associated Forms section of the Study Setup tab for a study.

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.

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.