

Overview

Libraries ▾ eSample ▾ Reporting ▾	
<b>Calendars</b>	<b>Forms</b>
Search	Search
Add Category	Add Category
Add Calendar	Add Form
Copy	Copy
<b>Events</b>	<b>Fields</b>
Search	Search
Add Category	Add Category
Add Event	Add Edit Box
	Add Multiple Choice
	Copy

## Library Management

The Library within Velos eResearch is a central repository for saved templates used for Calendars, Events, Forms, and Fields. Libraries provide permissioned users the ability to reuse standard items that are used frequently across studies.

Library	Description
Events	The library houses a site's charge master. The items in the charge master are listed as events with the cost and other details such as CPT codes.
Calendars	The library is used to create calendar categories and events. A template is added to a study and modified per the study's schedule of events.
Fields	The library is used to house fields commonly used in forms. By creating and storing fields in the field library, it allows users to select fields to build a form.
Forms	The library is used to create form templates and store them. Form templates can be associated to an account level, study level, study patient level, or patient level. After a template has been associated it can be modified, if needed.

## Navigation

Every section used in Library Management can be accessed by clicking Libraries on the default homepage and navigating to any of the links under the subheadings.

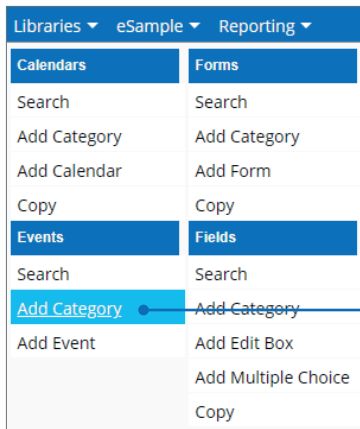
## Recommended Order of Library Management

- Events **must** be created before Calendars.
- Fields **must** be created before Forms.



# Events Library

The Events Library houses a institution's charge master for those who have one. The items in the charge master are listed as events with the cost and other details such as CPT codes.



## Add an Event Category

Within each charge master, events are given a category. Before creating an event, at least one event category must be established. From the **Librarians** tab, select **Add Category** under the "Events" heading.

If a charge master is not uploaded, categories must be created before creating events.

▶ Current Page: Event Library>> Event Category

**Please enter Event Category details**

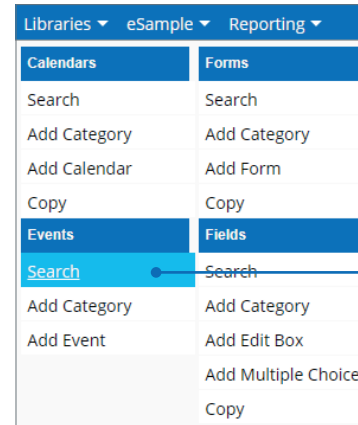
Event Library \*

Event Category Name \*

Event Category Description

Budget Category

Enter the necessary information on the Event Category details page. The specified Budget Category for an Event Category will apply all events under that category when the calendar is part of a budget.



## Search Events Library

From the **Librarians** tab, select **Search** under the "Events" heading.

The **Event Search** field displays. **Search** for an event prior to adding a new events. An Event Library must be selected prior to searching for an event in the system for results to display.

▶ Current Page: Event Library

Calendar Library | **Event Library** | Form Library | Field Library

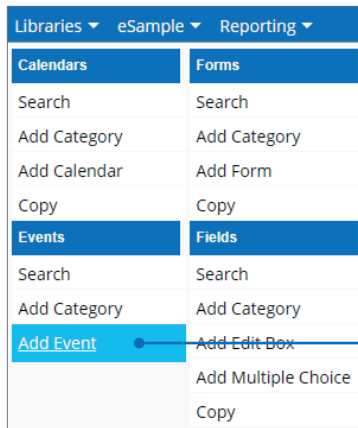
**Search By**

Event Library:  Cost Type:

CPT code:  Additional Codes:

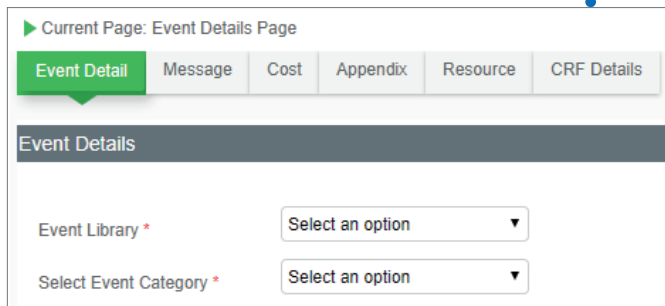
Facility:

Events Library *(continued)*



### Add an Event

If no charge master was uploaded, or the required event is not already in the system, users can manually add events to the event library. To add an event, from the **Libraries** tab, select **Add Event** under the "Events" heading.



Tab	Description
Event Detail	Define the event by establishing the Event Library, Event Category, Event Name, etc.
Message	Enter a message for a generated auto-notification for patients and system users. This is used for Study Management and is not recommended for Library Management tasks.
Cost	Enter a specified cost to associate with an event.
Appendix	Add, Edit, or Delete reference materials to an event.
Resource	Add personnel resource information and specific system users to an event. This is used for Study Management and is not recommended for Library Management tasks.
CRF Details	Add CRF information to an Event. This is used for Study Management and is not recommended for Library Management tasks.

# Calendar Library

Libraries ▾ eSample ▾ Reporting ▾

<b>Calendars</b>	<b>Forms</b>
Search	Search
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	Copy

## Add a Calendar Category

From the **Libraries** tab, select **Add Category** under the "Calendars" heading.

Enter a category name and description on the Calendar Category page.

Calendar Library >> Calendar Category

Please enter the following Calendar Category details

Calendar Category \*

Category Description

e-Signature \*

## Create a New Calendar

Click **Create a New Calendar** on the top right of the Calendar Library page.

Libraries ▾ eSample ▾ Reporting ▾

<b>Calendars</b>	<b>Forms</b>
<b>Search</b>	Search
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	Copy

Current Page: Calendar Library

Calendar Library | Event Library | Form Library | Field Library

Search By

Calendar Name:  Category:

Library Calendars:

Calendar Category	Calendar Name	Description	Status	Shared with	Reports	Delete
Administrative Calendars	Administrative Calendar		Work in Progress	All Account Users	Schedule	
	Structured Patient Visit Calendar - Alternate	Structured Visit Calendar	Work in Progress	All Account Users	Schedule	

Define the Calendar | Select Events | Manage Visits | Event-Visit Grid | Coverage Analysis | Patient Cost Items

## Search the Calendar Library

From the **Libraries** tab, select **Search** under the "Calendars" heading.

Enter your search criteria in the available search fields. Search the calendar library prior to adding a calendar to see if a similar calendar already exists.

## Manage a Calendar

Select a Calendar Name from the Calendar Library, then use the Calendar tabs to Define or Manage the Calendar. At the Library Management level, it is recommended that users only complete the Select Events tab and add standard events. The ability to configure patient costs using the Patient Cost Items tab is only available in Velos eResearch Enterprise.

## Fields Library

Libraries ▾ eSample ▾ Reporting ▾	
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### Add a Field Category

Fields can be organized by categories. Before creating a field, at least one field category must first be established. For example, you might organize your fields by specific types of data, such as Date Fields, Demographics, or Medical History.

To add a Field Category, from the **Libraries** tab, select **Add Category** under the "Fields" heading.

### Category Details

In the Field Library Category page, enter the necessary information. Enter your **e-Signature** and click **Submit**.

Field Library >> Category

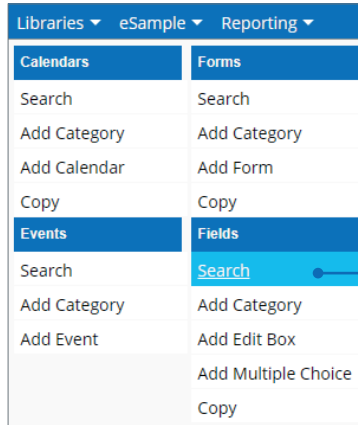
**Please enter the following Category details**

Category Name \*

Category Description

e-Signature \*

## Fields Library (continued)

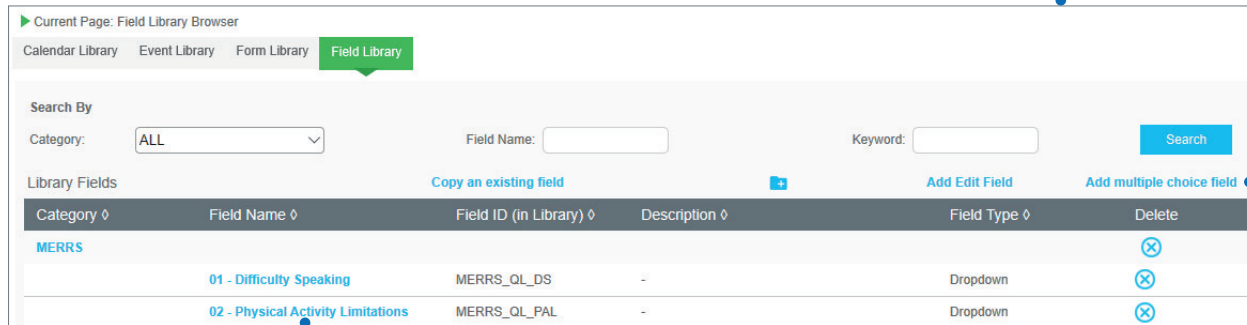


### Search the Field Library

Before adding a new field, you should search the field library to see if there is a similar field that already exists.

From the **Libraries** tab, select **Search** under the "Fields" heading.

Use the search fields to search the Field Library.

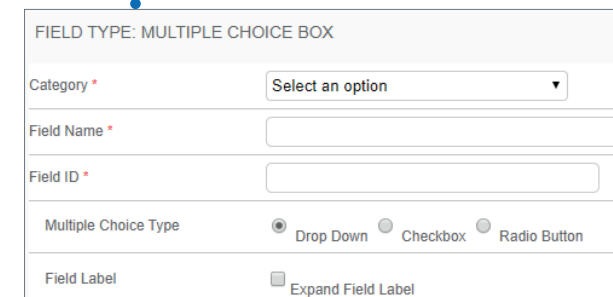
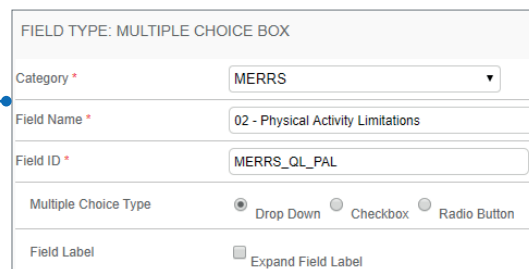


### Add Fields

From the Field Library, select **Add Edit Field** or **Add Multiple Choice Field**. Enter information as appropriate.

### Manage Fields

From the field search display, select a **Field Name** to open the Field Edit Box.



# Forms Library

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## Form Library

From the Libraries tab, select **Search** under the "Forms" heading.

The Form Library tab displays where users can search, modify an existing form by selecting the Name, **Copy An Existing Form**, or **Create a New Form**.

Current Page: Form Library

Calendar Library Event Library **Form Library** Field Library

Search By

Form Name:  Form Category: ALL

Library Forms  [Copy an existing form](#) [Create a new form](#)

Form Category	Name	Description	Status	Shared with	Preview	Delete	Info
Patient Level	MERRS-6 Questionnaire	MERRS-6 Questionnaire - Lung Health Rating Scale	Work In Progress	All Account Users			
	NCI - Cervical Cancer Evaluation	NCI - Cervical Cancer Evaluation	Work In Progress	All Account Users			

## Search the Form Library

Before adding a new form, search the form library to see if there a similar form that already exists.

## Create a New Form

There are two ways to create a new form.

1. From the Form Library page, click the **Create a New Form** link.
2. Click the **Libraries** tab and select **Add Form** under the "Forms" heading.

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## Define the Form

Enter the Form Name, Form Category, and Form Status. It is recommended that users keep the status "Work in Progress".

Current Page: Forms >> Define the Form

**Define the Form** Add Fields Form Settings

Form Name \*

Form Description  4000 characters left

Form Category \*

Form Status \*

e-Signature is Mandatory for this form's responses

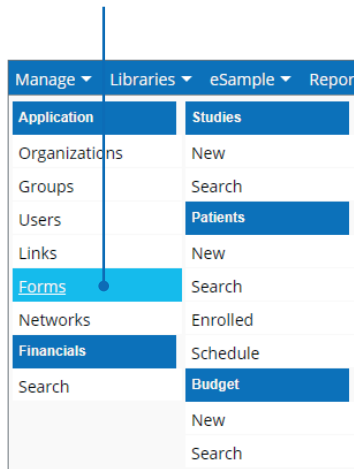
e-Signature \*

[Back to the Form Library](#)

## Forms Library (continued)

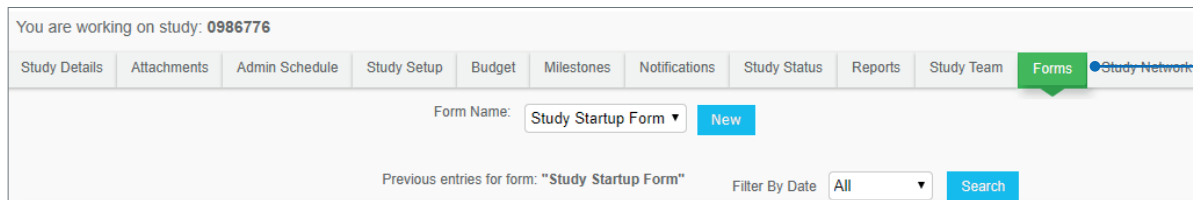
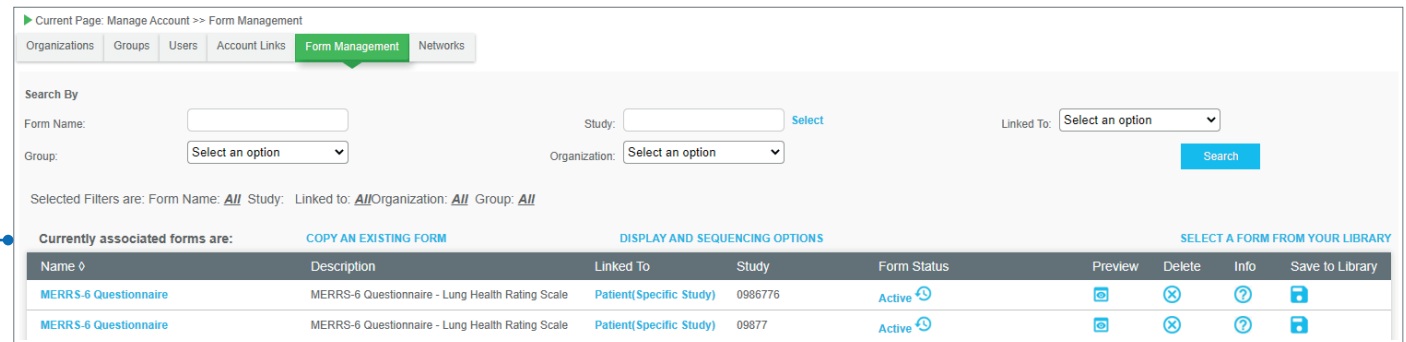
### Account Level

Account forms can be accessed from the default homepage or the Quick Access gadget. From the **Manage** tab, select **Forms** under the "Application" heading to manage Account Level forms.



The Forms Management tab displays where users can select an existing form to manage, select a form from their library, or copy an existing form.

*Note: There are multiple ways to associate forms in the library.*



### Study Level

From the homepage, search for or select the desired study by clicking the Study Administration (clipboard) icon under Quick Access. Click the **Forms** tab to search and manage study forms.



## Forms Library (continued)

Current Page: Study Patient >> Schedule

Demographics Patient Profile **Protocols** Reports Appendix

Pat.ID: 0000-44445 Pt. Study ID: 0000-44445 Age: 56 years Gender: Female Pat.Name: Charlotte Herbinger Org: WCG - VELOS Patient is not yet 'Enrolled'.

Screening/Enrollment **Schedule** Adverse Events Forms

Study #: 09877 Calendar: Structured Patient Visit Calendar Pat.Start Date: 12/17/2019  
[Edit Calendar/Date](#) [View Previous](#) [Delete Schedule](#)

Select Schedule: Structured Patient Visit Calendar, 12/17/2019 Visit: All Search

### Patient Level

From the homepage, search for or select the desired Study by clicking the Patient Management icon under Quick Access. Then click the desired Patient ID number. The Study Patient Protocols tab will display. Click the **Forms** link to manage Patient Forms.

Current Page: Study Patient >> Form Response Browser

Demographics Patient Profile **Protocols** Reports Appendix

Pat.ID: 0000-44445 Pt. Study ID: 0000-44445 Age: 56 years Gender: Female Pat.Name: Charlotte Herbinger Org: WCG - VELOS Patient is not yet 'Enrolled'.

Screening/Enrollment Schedule Adverse Events **Forms** MERRS-6 Questionnaire

The Forms dropdown menu appears where users can select an option and search associated forms. Then click **New** and define the form as needed.

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### Add a Form Category

Forms are data-entry points for key study, patient, and administrative functions. Forms are organized by categories. Check an existing category prior to adding one. From the Libraries tab, select **Add Category** under the "Forms" heading.

Form Library >> Form Category

Please enter the following Form Category details

Form Category \*

Category Description

e-Signature \*  Enter e-Signature  **Submit**

### Form Category Details

In the Form Category details page, enter the category name and description, then click **Submit**.