

# Study Patient Roster

Users tasked with Patient Management duties may change their homepage to the Study Patient Roster to streamline Patient Management. 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 and displays Patients associated to the Study.*

The screenshot shows the 'Study Patient Roster' interface. At the top right, the user 'Laura Palmer' is logged in. Below the header, there is a search bar labeled 'Search Patients on a Study:' containing the text '484744'. To the right of the search bar is a button labeled 'Add Patient'. Below the search bar is a section titled 'Patient List:' containing a table with the following data:

	Patient Study Id	First Name	Last Name	Enrolled Date	Enrolling Site	Current Status	Assigned To	Last Visit	Next Due
✓	MRN8767	Mary Elizabeth	Delgado		Benton Medical	Enrolled	✎		
✓	MRN678767876	Jamal	Hammond		WCG - VELOS	Screen Failure	✎		
✓	MRN898	Leo	Peterson		WCG - VELOS	Enrolled	✎		
✓	MRN543636	Lily-May	Lucero		WCG - VELOS	Screen Failure	✎		
✓	MRN899211	Henri	Marsh		WCG - VELOS	Screen Failure	✎		
✓	MRN01111	Santiago	Lamb		WCG - VELOS	Enrolled	✎		

The screenshot shows the 'Patient Study Status' form for Patient ID MRN01111 and Study Number 484744. The form includes the following fields:

- Status: Enrolled (dropdown menu)
- Reason: Select an option (dropdown menu)
- Status Date: 02/20/2020 (text input)
- This is patient's current status in this study
- Notes: (text area)

## 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)

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.

	Visit	Scheduled Date	Event Name
<input type="checkbox"/>			
<input checked="" type="checkbox"/>	Initial Visit	<b>+Unsch</b>	
<input checked="" type="checkbox"/>	Follow-up and Labs	<b>+Unsch</b>	
<input checked="" type="checkbox"/>	Follow-up Visit 1	<b>+Unsch</b>	
<input checked="" type="checkbox"/>	Follow-up Visit 2	<b>+Unsch</b>	
<input checked="" type="checkbox"/>	Follow-up Visit 3	<b>+Unsch</b>	
<input checked="" type="checkbox"/>	Follow-up Visit 4	<b>+Unsch</b>	

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 displays where you can 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.*

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

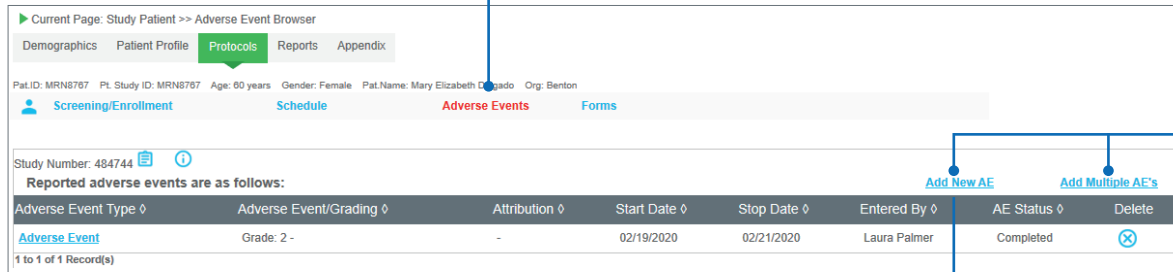
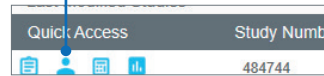
# Adverse Events

## Access Adverse Events

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

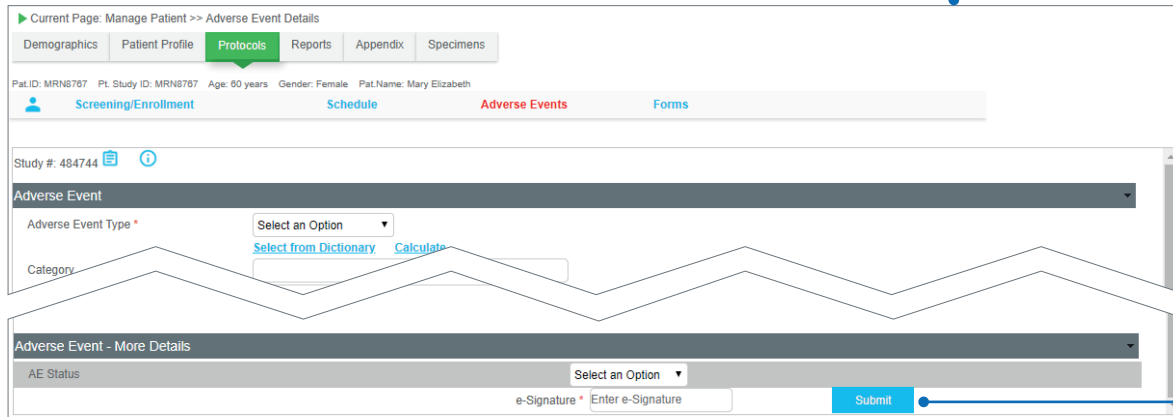
Click the Patient Management icon in Quick Access to view enrolled patients.

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, permitted 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 save with your e-Signature.

# Patient Forms

► Current Page: Study Patient >> Schedule

Demographics Patient Profile **Protocols** Reports Appendix

Pat.ID: MRN8767 Pt. Study ID: MRN8767 Age: 60 years Gender: Female Pat.Name: Mary Elizabeth Delgado Org: Benton Medical

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

Study #: 484744 Calendar: Structured Patient Visit Calendar Pat.Start Date: 02/21/2020  
[Edit Calendar/Date](#) [View Previous](#) [Delete Schedule](#)

Select Schedule: Structured Patient Visit Calendar, 02/21/2020 Visit: All Search

Patient Forms are patient related documents such as 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: MRN8767 Pt. Study ID: MRN8767 Age: 60 years Gender: Female Pat.Name: Mary Elizabeth

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

Study Number: 484744 Previous entries for form: "MERRS-6 Questionnaire" **New** Filter By Date All ▼

No Records Found

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

► Current Page: Manage Patient >> Study Forms

Demographics Patient Profile **Protocols** Reports Appendix

Pat.ID: MRN8767 Pt. Study ID: MRN8767 Age: 60 years Gender: Female Pat.Name: Mary Elizabeth Delgado Org: Benton Medical

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

Study Number: 484744 Form Name: MERRS-6 Questionnaire

**Form Details**

Data Entry Date\*  Study Treatment ARM\*  ?

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