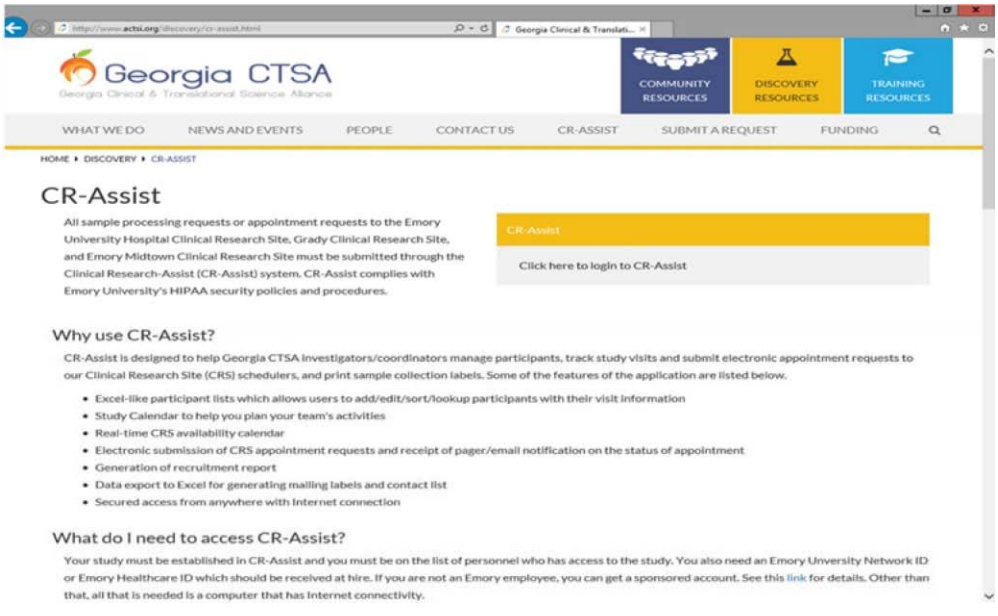
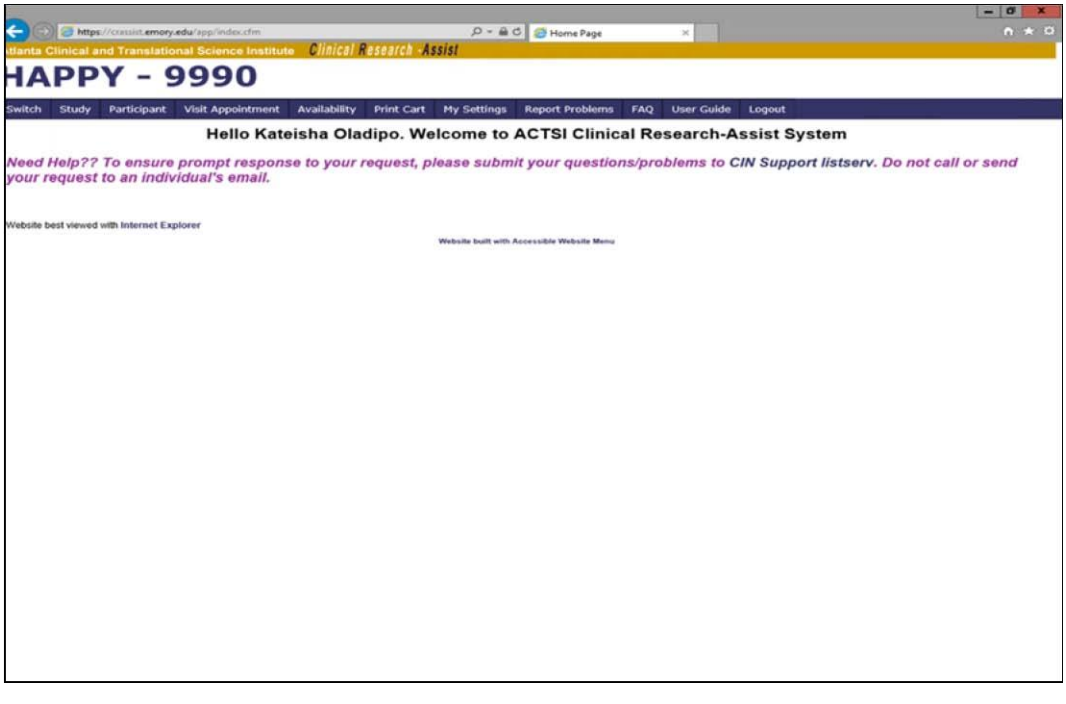
CR-Assist Job-Aid

I. Starting CR-Assist

Following this step to start CR-Assist Open your web browser such as Internet Explorer, FireFox or Chrome. Enter this address on the web browser: http://georgiactsa.org/discovery/cr-assist.htm You should see this web page.



 Click on "Click here to login to CR-Assist" You will be then asked to enter your Emory network ID and the corresponding password. If you login successfully, you should see this welcome page.

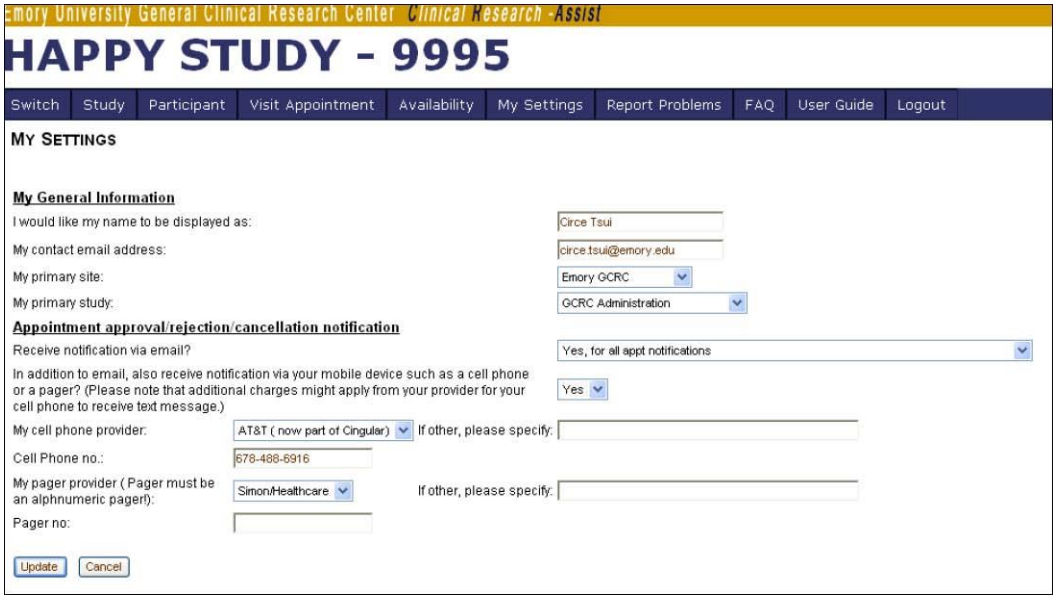


- Your name should be displayed along with the name of your research study. If your name is not there, DO NOT USE THE SYSTEM. You will risk losing your data.
  - When you move your mouse across the menu bar under the name of your study, you should see the color of the main menu item you highlighted changing from blue to yellow. Also, if the main menuitem contains sub-menu items, you should see an expanded list of sub-menu items underneath.

If you have multiple studies registered with CR-Assist, you will be able to work with different studies simultaneously. The section will discuss the process.

II. Setting up your profile – My Settings Page

Before starting to use CR-Assist, you should make sure your profile has been setup correctly in the “My Settings”. You navigate



this page by clicking “My Settings’ main menu item on the top menubar.

Make sure that your name and your preferred email address are correct. Choose your primary site. The primary site will determine the primary site of your participants whenyou enroll them. Choose your primary study. If you have access to more than one study, the primary study will appear first when you logon to the system. If you would like to receive appointment notification via email whether the appointments hasbeen accepted or rejected, choose ‘Yes for all appt notifications”.

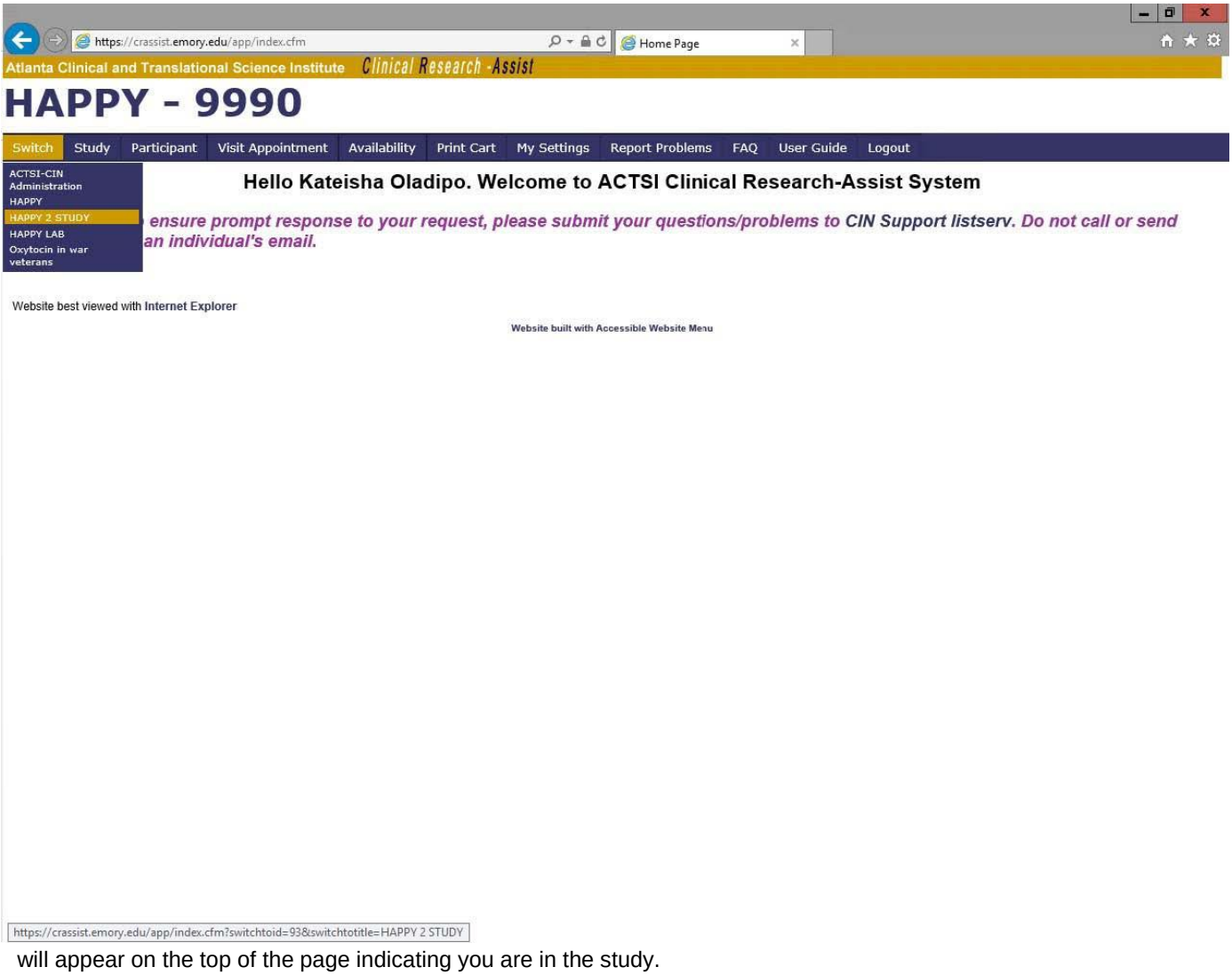
If you would like to receive appointment notification via email only when an appointment has been rejected, choose “Yes, but only for appointments that are rejected or attached with CINscheduler’s message”.

If you don’t want to receive notification at all, choose ‘No’. You can also indicate whether you would like to receive notification via your mobile device such as a cell phone or a pager, in additional to email.

Enter your cell phone or pager information if you want cell/page notification. Click “Update” to update the information and then confirm. Any changes will be applied when next time you log back in.

III.Switching among studies

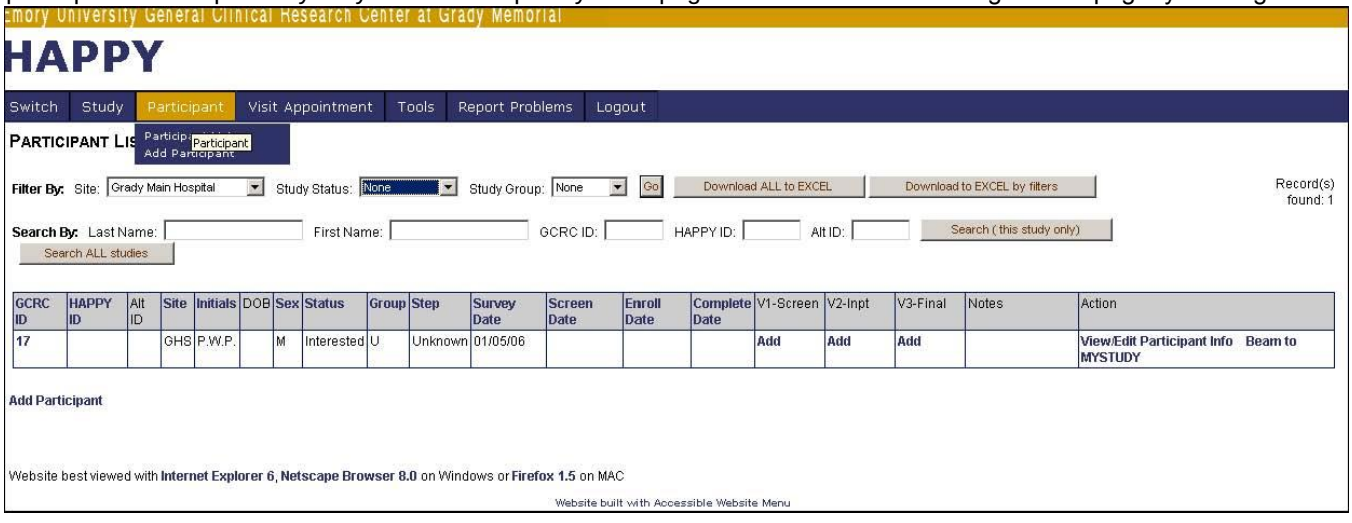
When your account with CR-Assist was first being setup, you were assigned to a primary study. That study will be the first shown when you log in. You can switch to work with a different study by following thesesteps: Highlight “Switch” on the top menu bar. You will see a list of studies with which you can work. Click on the study you desire. Now the study title



will appear on the top of the page indicating you are in the study.

IV. Participant List

The participant list will probably be your most frequently used page on CR-Assist. You navigate this pageby clicking “Participant’



main menu item on the top menu bar.

Each participant will occupy one row in the list. The list shows all the participants who are in the studyregardless of their status. The columns between complete date and action are defined by your study parameters. They are essentially the study visits you are tracking. If a visit has been requested, scheduled, or if it has occurred, the date of the visit will appear.

1. Apply filter to the list

You can “shorten” the participant list to make it more manageable by applying filter(s). You can filter according to the primary visit site, the study status, or the study group. Follow these steps to apply filter(s):

 Look for ‘Filter by’ located on the left hand side under the heading ‘Participant List’. If you want to filter by primary visit site, look for the word ‘site’ next to ‘filter by’. Click on thedownward arrow on the right to expand the list of choices. Select the site you want to view.

 If you want to filter by study status, look for the word ‘study status’ on the same line of ‘filter by’. Click on the downward arrow on the right to expand the list of choices. Select the study status you want to view.If you don’t want to filter by study status, make sure ‘None’ is selected.

 If you want to filter by study group, look for the word ‘study group’ on the same line of ‘filter by’. Click on the downward arrow on the right to expand the list of choices. Select the study group you want to view. If you don’t want to filter by study group, make sure ‘None’ is selected.

 You can filter by more than one attribute at the same time. Click the ‘GO’ button on the same line of ‘filter by’. Only the participants with the selected attributes will be shown.

2. Looking up a participant You can search for a participant by his/her name, CIN ID, Subject ID or ALT ID. Follow the steps below tosearch:

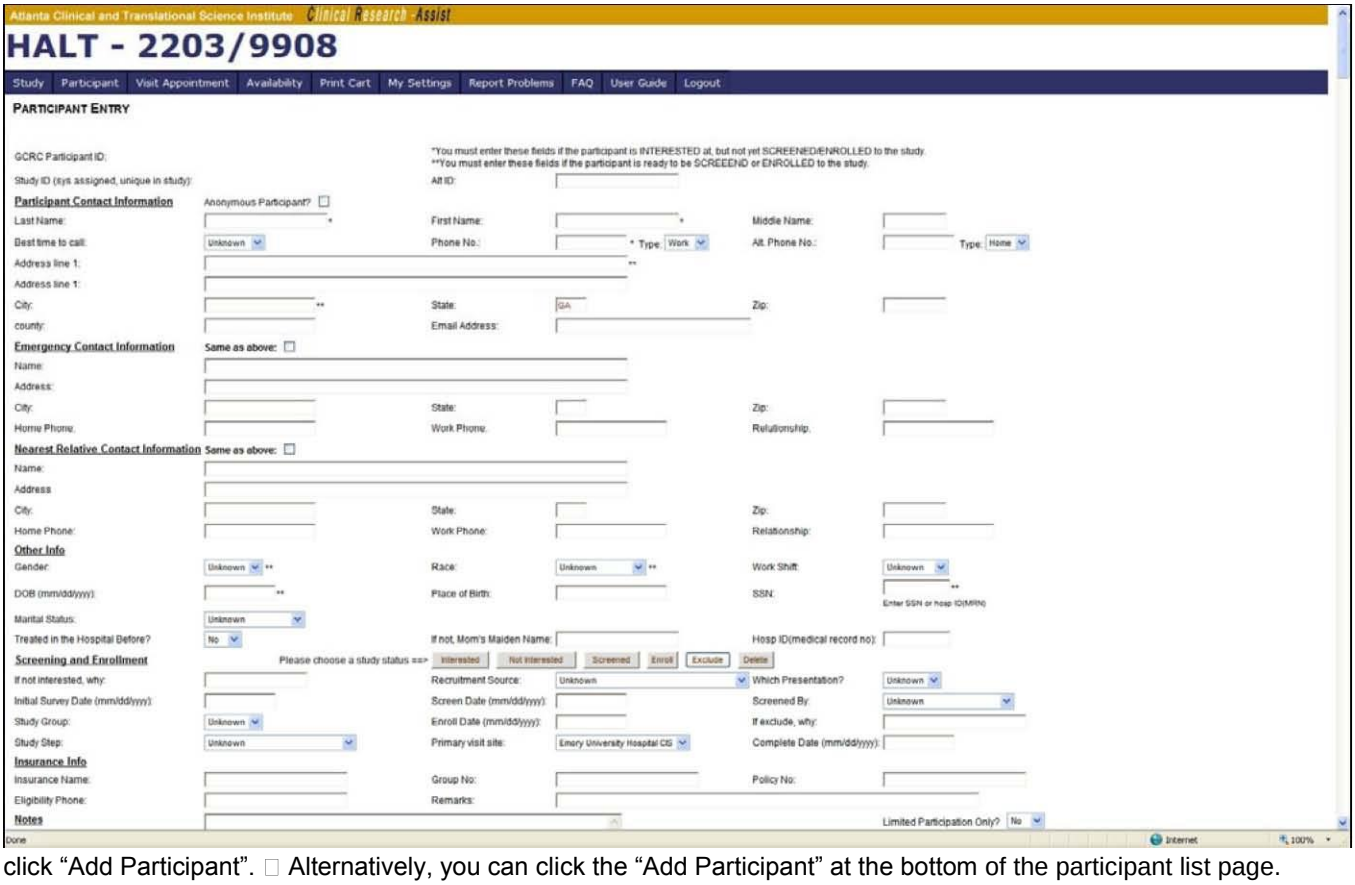
 Look for ‘Search by’ located on the left hand side under ‘Filter by’ Enter any combination of these fields: last name, first name, CIN ID, Subject ID or ALT ID. Click the ‘Search (this study only)’ button. The participant(s) match(es) the search criteria will be shown. Searching by last name, first name or ALT ID allows a partial match. (i.e If you put ‘Will’ in first name and

click ‘Search’. Both participants with name William or Willy will be returned, but Bill will not.) Alternately, you can click the ‘Search ALL studies’ button if you are allowed to manage more than one of the studies. The search will be performed on all participants in each/any of your studies.

V. Adding / Editing Participant Information

1. Adding a participant

You can add a new participant by following these steps: Highlight the “Participant” main menu item on the top menu bar, then



click “Add Participant”. Alternatively, you can click the “Add Participant” at the bottom of the participant list page.

 You will see a blank participant entry page:

- You must fill in the **last name,** the **first name,** and the first **telephone number**, and indicate whetherthe number is for work or home. If you don't have a participant's telephone number, you can enter the participant's email address instead.
  - If you are enrolling the participant, you will also need to fill in the **date of birth (DOB), sex, and race**.
- **Study Status**: The new participant could be a potential subject who is interested at the study but needs to go through a screening process (**study status = interested**). The participant could be a subject who has been enrolled to the study (**study status = enrolled**). The participant could be a subject who has passed the initial screening via a phone interview (**study status = screened**). The participant could have completed the study already (**study status = completed**).
- The **Enroll date** will be auto-populated and will default to today's date when you click 'ENROLLED'. You can, however, change the enroll date. The **Screen date** will be auto-populated and will default to today's date when you click 'SCREENED'. You can, however, change the screen date. **Study group and study step** are default to unknown. **Emergency contact and nearest relative information** are required for hospital registration. You should enter these fields if the CIN is responsible for registering your participants in the hospital system. When you click on the "same as above" checkbox next to the 'Nearest relative information', all information from the emergency contact section will be copied.
  - You can enter any relevant information into the **notes** field. All dates must be entered in this format: mm/dd/yyyy **LEAVE THE SSN FIELD BLANK, IT IS NOT ACTIVE, YOU WILL GET AN ERROR MESSAGE** All phone numbers must be entered in this format: (999)999-9999 or 999-999-9999. Click "**submit**" at the bottom of the page when you are done. **If there are missing values, those fields will be highlighted and you will be required to enter them before proceeding. If you did not put anything in the SSN and you still get this message, you are missing something else.**
- If all required fields are populated, click the "**confirm"** .Click the "**back**" button at the bottom of the page tore-enter or change any value. Or you can" to indicate that all values has beenentered correctly.
- The application will check to see if this participant has already been entered into the system. If there isa participant with the same last name and first name either in this study or in other studies that you have access to, it will display the message, "**There is another participant that has the same name. Are you sure you want to enter this data?**". When you see this message, your best course of action is to click "**cancel**" at the bottom of the page and return to the participant list. Then search for the participant by last name and first name as described in the section III C 2. If the result shows that the participant is actually the same person, you should not enter the person again into the system.
  - If there is no missing value and no duplication of participants' names, the participant will be added and you will see the message, "**Participant added successfully. CIN ID=**??". The CIN ID is theautomatically ID assigned to the new participant.

2. Editing a participant

You can change the information of a participant as follows: Go to Participant List. Look for the participant row that you want to edit. Click on the GCRC ID or "View/Edit Participant Info" on the participant row. You will be directed to a write-protected participant entry page. All the current information with the participant will be displayed.

- Click "**Edit**" at the bottom of the page. You will be allowed to change the information in any fields onthe page except the CIN ID, subject ID, and initials. Initials are automatically assigned according to the participant's name.

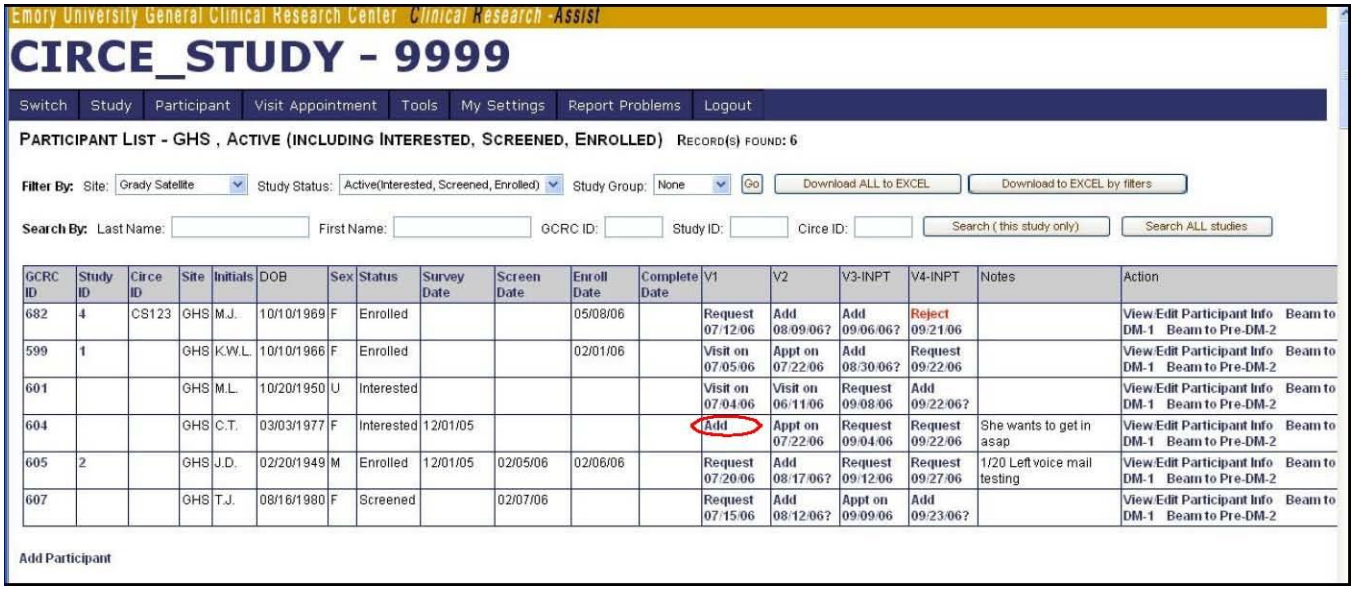
When you are finished, click "**Submit**". You will be asked to carefully review the data. If everything is correct, click "**Confirm**" and "Participant edited successfully. CIN_ID=??" will appear

VI. Scheduling

A. Adding a new visit and printing the CIN registration form

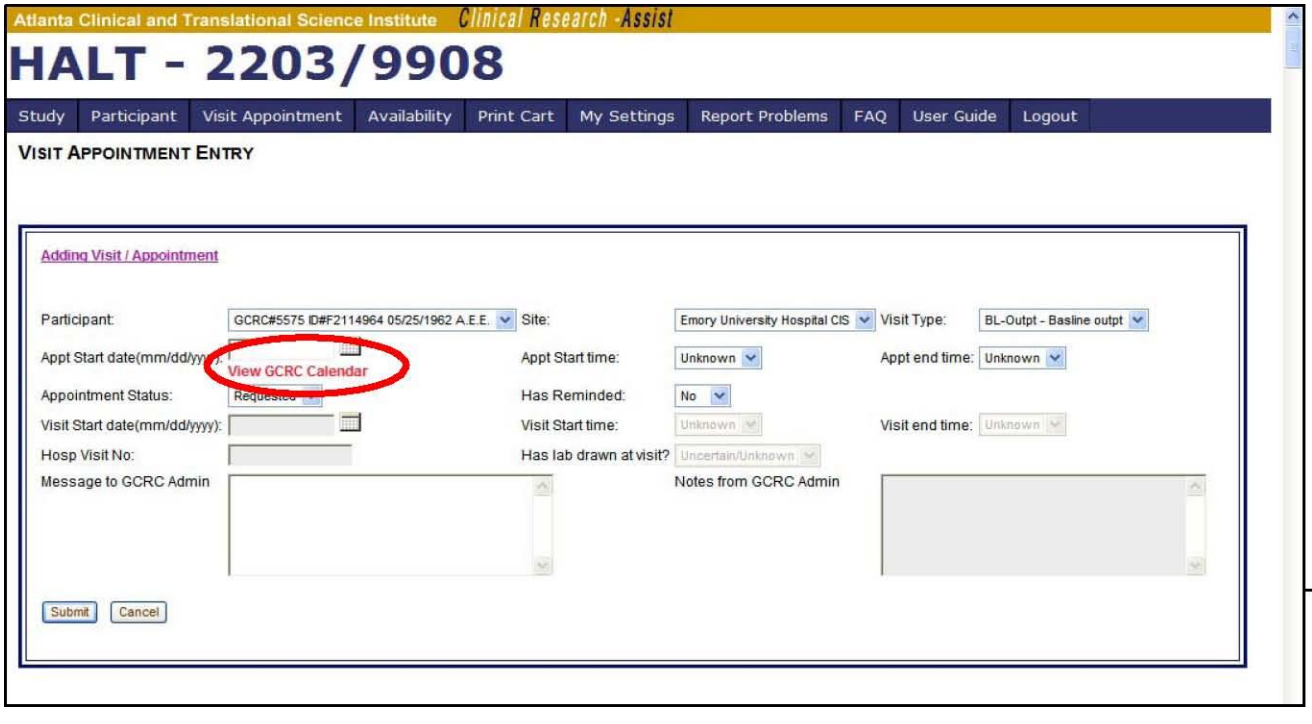
Follow the steps below to schedule a visit:

- Go to Participant List and look for the participant for whom you want to schedule a visit.
  - Locate the column that indicates the visit you want to schedule. If there is yet no such visit with the participant, you should see “Add”. Click on the add link.

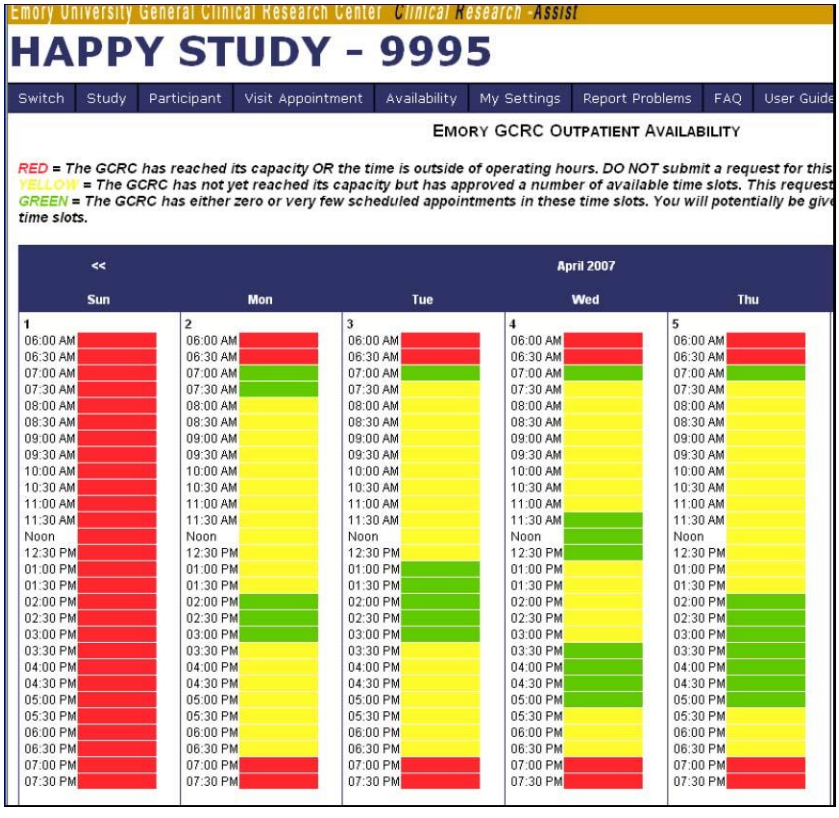


- You will be directed to the visit /appointment entry page.

- The **Participant CIN ID** and the **visit type fields** will be automatically populated.
- The **Site** will default to the participant’s primary visit site.
- You <u>should</u> view the GCRC Calendar to help you to choose a date by the link in red. Another window will be opened with the monthly calendar.


Atlanta Clinical and Translational Science Institute
Clinical Research Assist
HALT - 2203/9908
Study
Participant
Visit Appointment
Availability
Print Cart
My Settings
Report Problems
FAQ
User Guide
Logout
VISIT APPOINTMENT ENTRY
Adding Visit / Appointment
Participant:
GCRC#5575 ID#F2114964 05/25/1962 A.E.E.
Site:
Emory University Hospital CIS
Visit Type:
BL-Outpt - Basline outpt
Appt Start date(mm/dd/yyyy):
View GCRC Calendar
Appt Start time:
Unknown
Appt end time:
Unknown
Appointment Status:
Requested
Has Reminded:
No
Visit Start date(mm/dd/yyyy):
Visit Start time:
Unknown
Visit end time:
Unknown
Hosp Visit No:
Has lab drawn at visit?
Uncertain/Unknown
Message to GCRC Admin
Notes from GCRC Admin
Submit
Cancel

Legends



RED =The CIN has reached its capacity OR the time is outside of operating hours. DO NOT submit a request for this time slot.

YELLOW =The CIN has not yet reached its capacity but has approved a number of available time slots. This request will be responded to by our schedulers.

GREEN =The CIN has either
zero or very few scheduled appointments in these time slots.You will potentially be given automatic approval if you sub mit to these time slots.

- You should request green time as much as possible. If you request red time, your appointment will be rejected automatically. Click the calendar icon next to **appt start date** to open up a calendar and select the desired date. Move to **appt start time**. Click on the downward arrow to select the desired start time. One you have chosen, the **appt end time** will be automatically changed to reflect the length of the visit as defined by your study parameters. You can, however, change the end time if you wish.

If the visit type corresponds to an inpatient visit, you will see **appt end date.** Again, the end date willbe automatically changed to reflect the length of the visit once you have picked a start time. You can, however, change the end date if you wish.

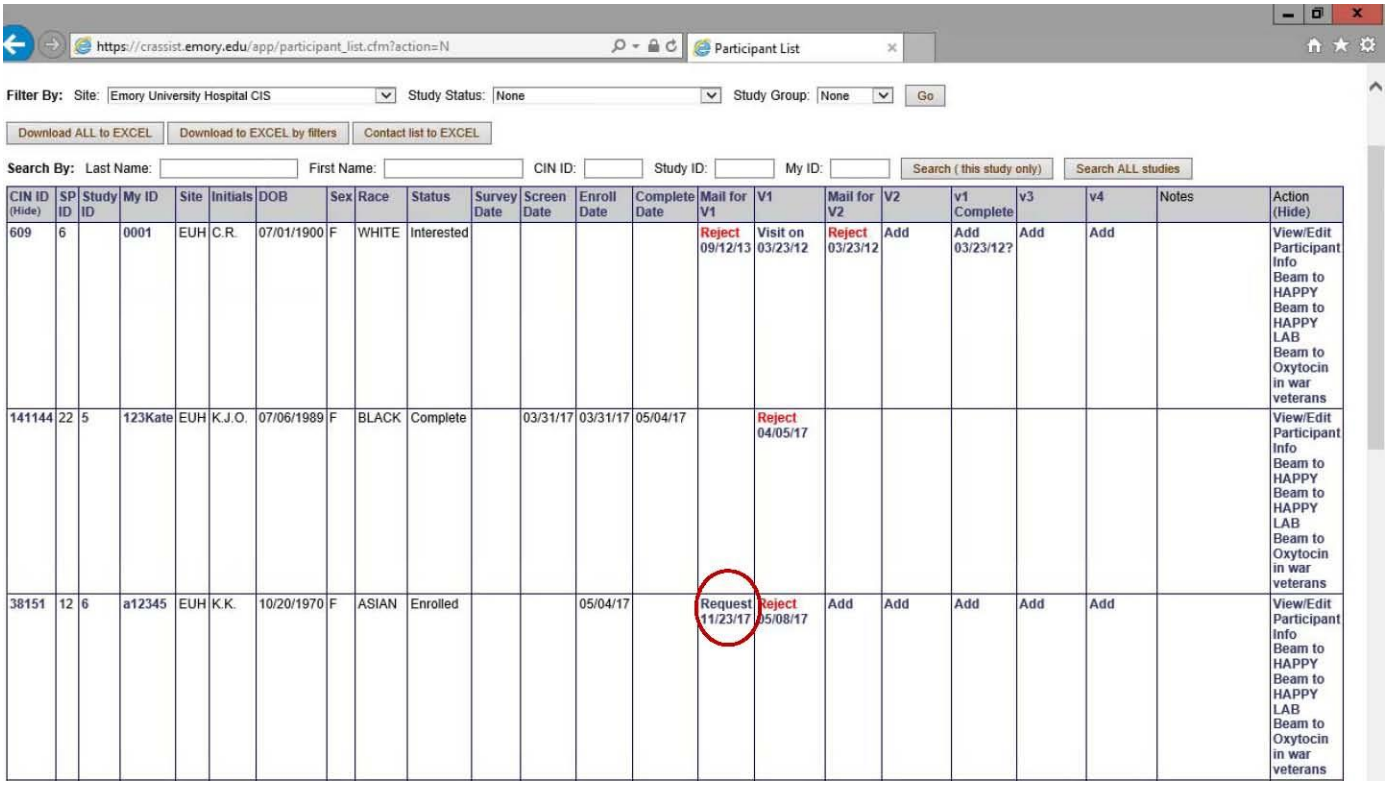
- If the visit type corresponds to a CRN visit, the **appointment status** will default to "**Requested**" since you are requesting a visit with the CRN. If the visit type corresponds to a non-CRN visit, the appointment status will default to **"Scheduled"**.

Click "**Submit**" and "**Confirm**" If you sign up for the email notification service, you should receive an email immediately after the CIN scheduler has reviewed the appointment. The email will look like this:

```
Time=09/07/2006 12:13:18PM
Message=The status of the V6 - Activity 5 ( Part B) appointment for GCRC#582 SUBJECT#PE0010 C.L.A. you recently submitted has
been changed to SCH. Notes from GCRC Admin (this field maybe empty)=
```

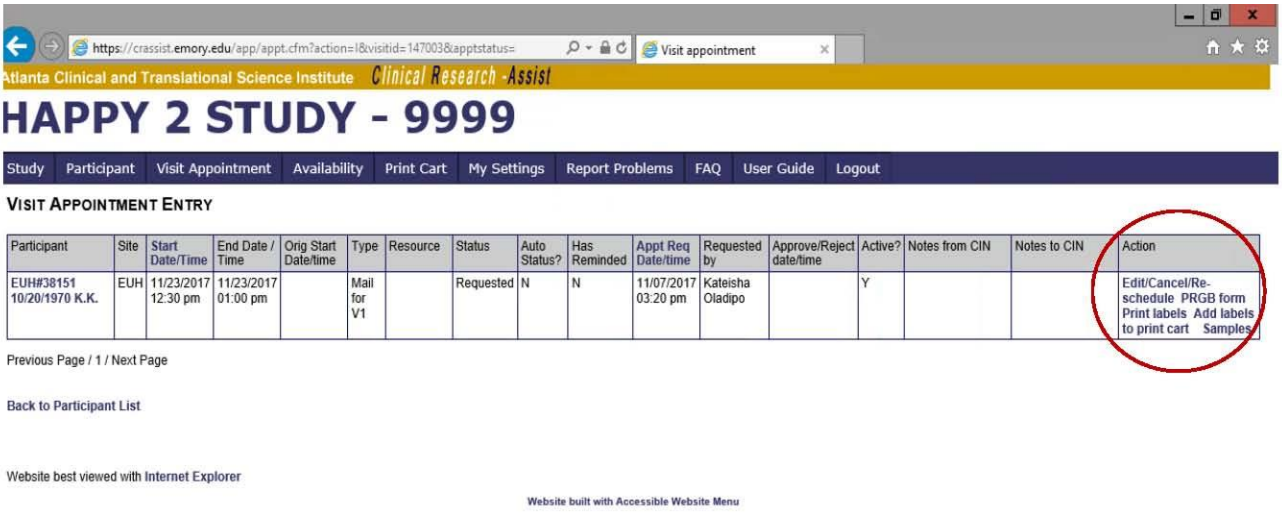
B. Editing, Cancelling, Rescheduling, Repeating Visits

You can edit, cancel, re-schedule an appointment prior to its date/time by following these steps: Go to Participant List. Look for the participant and the visit column. Click the “Request on”, “Reject” or “Appt on” link.



CIN ID (Hide)	SP ID	Study ID	My ID	Site	Initials	DOB	Sex	Race	Status	Survey Date	Screen Date	Enroll Date	Complete Date	Mail for V1	V1	Mail for V2	V2	v1 Complete	v3	v4	Notes	Action (Hide)
609	6		0001	EUH	C.R.	07/01/1900	F	WHITE	Interested					Reject 09/12/13	Visit on 03/23/12	Reject 03/23/12	Add	Add 03/23/12?	Add	Add		View/Edit Participant Info Beam to HAPPY Beam to HAPPY LAB Beam to Oxytocin in war veterans
141144	22	5	123Kate	EUH	K.J.O.	07/06/1989	F	BLACK	Complete		03/31/17	03/31/17	05/04/17		Reject 04/05/17							View/Edit Participant Info Beam to HAPPY Beam to HAPPY LAB Beam to Oxytocin in war veterans
38151	12	6	a12345	EUH	K.K.	10/20/1970	F	ASIAN	Enrolled			05/04/17		Request 11/23/17	Reject 05/08/17	Add	Add	Add	Add	Add		View/Edit Participant Info Beam to HAPPY Beam to HAPPY LAB Beam to Oxytocin in war veterans

 You will be directed to the visit appointment entry screen where your appointment will appear. Click“Edit, Re-Schedule, or Cancel” on the right hand side of the appointment row in “Action” Column.


https://crassist.emory.edu/app/appt.cfm?action=l&visitid=147003&apptstatus=
Visit appointment
Atlanta Clinical and Translational Science Institute
Clinical Research -Assist
HAPPY 2 STUDY - 9999
Study
Participant
Visit Appointment
Availability
Print Cart
My Settings
Report Problems
FAQ
User Guide
Logout
VISIT APPOINTMENT ENTRY
Participant
Site
Start Date/Time
End Date / Time
Orig Start Date/time
Type
Resource
Status
Auto Status?
Has Reminded
Appt Req Date/time
Requested by
Approve/Reject date/time
Active?
Notes from CIN
Notes to CIN
Action
EUH#38151 10/20/1970 K.K.
EUH
11/23/2017 12:30 pm
11/23/2017 01:00 pm
Mail for V1
Requested
N
N
11/07/2017 03:20 pm
Kateisha Oladipo
Y
Edit/Cancel/Re-schedule PRGB form Print labels Add labels to print cart Samples
Previous Page / 1 / Next Page
Back to Participant List
Website best viewed with Internet Explorer
Website built with Accessible Website Menu

C. Repeating a visit

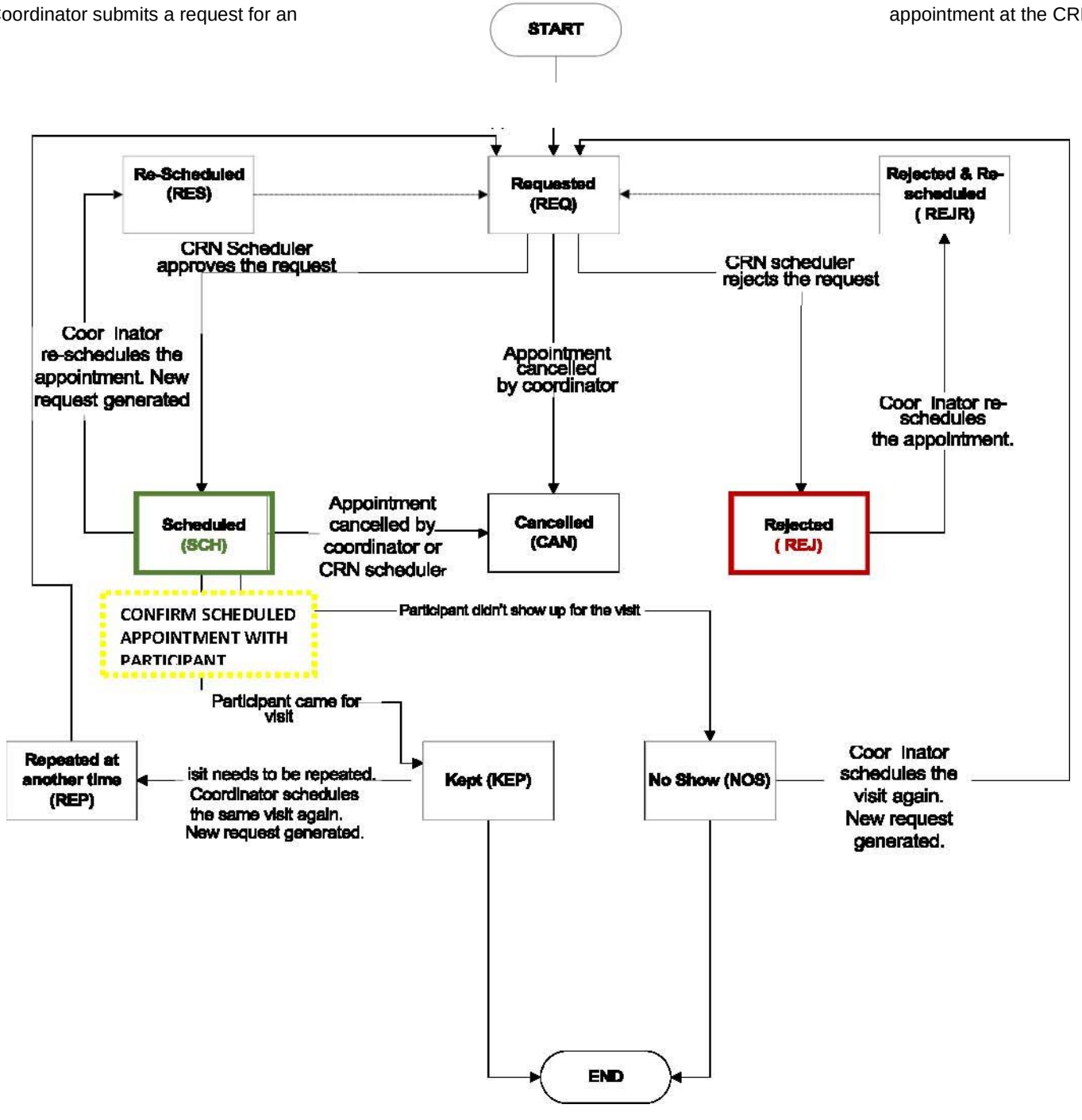
You can repeat a visit and generate a new appointment request by following these steps:

- Go to Participant List.
- Look for the participant and the visit column.
- Click the “Visit on” link.
- You will be directed to the visit appointment entry screen where your appointment will appear. Click “Repeat” on the right hand side of the appointment row.
    - A new request page will display. Enter the new appointment start date and time and click “**submit”.**
- After carefully reviewing your data, click **“Confirm**” to finalize the entry.
- You will be re-directed to the Visit Appointment page displaying the new appointment request.
- Your newly-requested appointment will be sent to the CIN scheduler electronically. You shouldcheck back in a few hours to learn if the appointment has been approved or rejected

Appointment status is the key to successful visit management. Below is a diagram that describes the meanings of status variations and also describes when a change in status can occur.

CRN APPOINTMENT STATUS FLOW

Coordinator submits a request for an appointment at the CRN



Study Status

Study status provides a method for you to track a participant from the initial contact to his/her final completion. If you use study status correctly, you will be able to generate various enrollment reports and have a good handle on the overall progress of the study. The following diagram shows a typical study status flow: