

## Tracking Patient Visits

After a patient has been added to a study, users can use *Patient Visits* to manage visits and other enrollment data. To reach the *Patient Visits* screen from the *Patients Screen*, select a patient, and click **Patient Visits**.

Patient visits for study: WA201-RC201									
Patient Info		Visit Info							
Alias: CCV Status: Screening Screen Num: 001 Rand Num:		<table border="1"> <thead> <tr> <th>Visit</th> <th>Visit Date</th> </tr> </thead> <tbody> <tr> <td>1 / Screening/Baseline</td> <td>12/07/2006</td> </tr> <tr> <td>1.01 / Cycle 1 Day 1</td> <td>12/27/2006</td> </tr> </tbody> </table>	Visit	Visit Date	1 / Screening/Baseline	12/07/2006	1.01 / Cycle 1 Day 1	12/27/2006	
Visit	Visit Date								
1 / Screening/Baseline	12/07/2006								
1.01 / Cycle 1 Day 1	12/27/2006								
Procedure	Provider	Type	Comp.						
Adverse Events Review	Unspecified,	Protocol-Required	Yes						
Case Report Form (CRF) Completion/Submission	Unspecified,	Protocol-Required	Yes						
CBC with differential	Unspecified,	Protocol-Required	Yes						
Chemistry panel/electrolytes	Unspecified,	Protocol-Required	Yes						
Concomitant Medications Review	Unspecified,	Protocol-Required	Yes						
Height & Weight	Unspecified,	Protocol-Required	Yes						
Karnofsky/Lansky status	Unspecified,	Protocol-Required	Yes						
Study Medication Administration	Unspecified,	Protocol-Required	Yes						
Urinalysis	Unspecified,	Protocol-Required	Yes						
Vital Signs	Unspecified,	Protocol-Required	Yes						
<a href="#">Add Visit</a>   <a href="#">Edit Visit</a>   <a href="#">Delete Visit</a>   <a href="#">Manage Patient</a>									
<a href="#">New Patient</a>		<a href="#">Patient Info</a>							
<a href="#">Add Patient to Study</a>		<a href="#">Patient Studies</a>							

- The top left contains patient enrollment info that was set when adding the patient to the study, and can be edited by clicking **Manage Patient**.
- The *Visit Info* section contains completed visits and dates.
- Selecting an individual visit displays details of that visit below. Details about the costs and quantity of a given procedure can be viewed and edited by clicking any of the procedure names in the detail section.
- Further visit information can be viewed or changed by clicking **Edit Visit**.

## Add Visit

Select the patient with the *Patient List* filters, and click **Patient Visits**. The patient and visit information displays.

1. Click **Add Visit**. The *Add Visit* box displays:

**Add Visit (Study: WA201-RC201)**

Select a visit:  Visit Date:  /  /

[Submit](#) | [Cancel](#)

2. From here, select the visit number and enter the correct date for the visit.
3. Click **Submit**, the *Visit Check List* displays.

Add Visit / Visit Check List						
<b>Patient:</b> Clint C Vickers <b>Alias:</b> CCV		<b>Patient Status:</b> Screening				
<b>Study:</b> WA201-RC201 <b>Visit:</b> 1.08 / Cycle 1 Day 8		<b>Screen Num:</b> 001		<b>Rand Num:</b>		
<b>Visit Date:</b> 12/27/2006			<a href="#">Set Visit Date</a>		<a href="#">Set All Providers</a>   <a href="#">Complete All Procedures</a>	
Visit Procedures						
Procedure Date	Procedure	Provider	Complete	Qty	Type	Procedure Notes
<input type="text" value="12"/> / <input type="text" value="27"/> / <input type="text" value="2006"/>	Vital Signs	<input type="text" value="Unspecified,"/> ▾	<input type="checkbox"/>	<input type="text" value="1"/>	Protocol-Required	<a href="#">Click to enter notes</a>
* <b>Note:</b> Vital signs will be assessed prior to temsirolimus administration and before the subject leaves the hospital. Vital signs include respiration rate, blood pressure, pulse and temperature.						
<input type="text" value="12"/> / <input type="text" value="27"/> / <input type="text" value="2006"/>	Study Medication Administration	<input type="text" value="Unspecified,"/> ▾	<input type="checkbox"/>	<input type="text" value="1"/>	Protocol-Required	<a href="#">Click to enter notes</a>
* <b>Note:</b> Temsirolimus will be administered once weekly for 6 months. The first dose must be given within 2 business days of randomization.						
<input type="text" value="12"/> / <input type="text" value="27"/> / <input type="text" value="2006"/>	Adverse Events Review	<input type="text" value="Unspecified,"/> ▾	<input type="checkbox"/>	<input type="text" value="1"/>	Protocol-Required	<a href="#">Click to enter notes</a>
<input type="text" value="12"/> / <input type="text" value="27"/> / <input type="text" value="2006"/>	Concomitant Medications Review	<input type="text" value="Unspecified,"/> ▾	<input type="checkbox"/>	<input type="text" value="1"/>	Protocol-Required	<a href="#">Click to enter notes</a>
<input type="text" value="12"/> / <input type="text" value="27"/> / <input type="text" value="2006"/>	CBC with differential	<input type="text" value="Unspecified,"/> ▾	<input type="checkbox"/>	<input type="text" value="1"/>	Protocol-Required	<a href="#">Click to enter notes</a>
* <b>Note:</b> Tests must be done within 72 hours prior to temsirolimus administration.						
Additional Procedures						
Date	Procedure	Provider	Qty	Procedure Notes		
There are no additional procedures assigned to this visit.						
<a href="#">Add Procedure</a>   <a href="#">Edit Procedure</a>   <a href="#">Remove Procedure</a>						
<a href="#">Submit Visit</a>   <a href="#">Cancel</a>   <a href="#">Visit Notes</a>						

4. Use the *Visit Check List* to check off procedures as complete, enter procedure specific notes, adjust the quantity, change the provider, and add additional procedures as needed.
5. If a procedure is not checked as complete, procedure notes are required:
6. If this window displays, enter notes stating why the procedure was not completed, and then click **Store Info**. Or, click **Cancel** to return to the visit checklist to mark the procedure as complete. Even if a procedure is marked as complete, procedure notes may still be entered if necessary. Click the **Click to enter notes** link.
7. Click **Submit Visit** when finished. Click **Cancel** to exit without saving. When submitting the visit, all the data related to the *Visit Checklist* is saved. Completed visits are displayed on the *Patient Visits* screen. From this point, use **Edit Visit** or **Delete Visit** to change information.

**Notes:**

- Visit date (**Set Visit Date**), as well as individual procedures dates can be changed by typing directly into the *Procedure Date* field.
- To mark all procedures as completed in one step, click **Complete All Procedures**.
- To add general visit notes for this particular visit, click **Visit Notes**.

**Manage Patient**

The **Manage Patient** link allows patient study information to be managed:

- **Patient Notes** - Click **Patient Notes** to enter any general information about this patient in relation to the study. Click **Save Notes** to save the information or **Cancel** to exit without saving.
- **Enrollment Info** - Clicking this link allows viewing and editing of the screening and randomization numbers, as well as the status change dates, alias, etc.
- **Change Status** – Use this to change a patient’s status in the study, i.e. “Randomized,” “Failed,” “Completed,” etc.
- **Re-Screen** - If a patient has a status of failed, this option allows a user to “re-screen” them into the study. Doing this is different from simply changing their status back to screening. Using **re-screen** retains the record of the failed patient, and creates a brand new patient, with a status of screening. A new screening number will need to be entered for them, and their alias



automatically has a “-2” added to it, i.e. “FML-2.” To re-screen a patient, click **Re-Screen** and you are prompted to re-enroll them into the study.

- **Change Investigator** - Use this link to set or change the Investigator assigned to the study patient.
- **Change CRC** – Use this link to change the patient’s study coordinator.
- **Change Study Arm** (Multi-arm studies only) – Allows the study arm for a patient to be changed.
- **Patient History** (Multi-arm studies only) – Provides specific auditing data on all activity for the selected patient in a given study.
- **Change Arm Cycle** (Multi-arm studies only) – Allows a patient to be assigned to subsequent “cycles” in the study.
- **Change Hospital** – Change hospital data for patient.
- **Change Disease Site** (NCI Reporting Studies only) – Set the disease site, which the patient will accrue towards on NCI reports.