

Using Reports

Overview

StudyManager provides some reports that may be helpful to coordinators and others involved in clinical research at Children's Hospital. When the Report Builder screen is first viewed, select a patient module and then one of the templates.

The screenshot shows a software interface with a menu bar containing 'File' and 'Go To'. Below the menu bar, there are two dropdown menus. The first is labeled 'Select Module:' and is currently set to 'Patients'. The second is labeled 'Select Template:' and is open, showing a list of options under the heading 'Saved Reports'. The options listed are: CRF Report, Patient Visit Detail, Study Patient Totals, Study Patients by Name, Study Patients by Status, Study Summary by Arm: Visit, Study Summary: Visit, and Visit Checklist.

Once a template is selected, any user-customized reports saved under that template will display.

After selecting a new or saved report, the fields of that report will display on the right hand side of the screen. Other fields can be added, and existing fields can be removed. Many fields on reports can also be filtered for specific data, i.e. a date range, a study, a group of patients, a sponsor, etc. Once the filtering information is selected, run the report. The report will come up as a preview, which can be further formatted, saved, printed, or exported to a text file.

Report Fields and Filters		
Field	Type	Filter
Study ID	Core	(not set)
Site ID	Core	(not set)
Site Name	Optional	(not set)
Patient Name	Optional	(not set)
Alias	Core	(not set)
Visit Date	Optional	(not set)
Visit Name	Optional	(not set)
Visit Number	Optional	(not set)
Show Off-Protocol Visits Only [filter only]	Core	(not set)
Procedure Name	Core	(not set)
Provider	Optional	(not set)
Procedure Notes	Optional	(not set)

Report Descriptions

Patient Visit Detail

This report provides information specific to a patient study visit. It shows: the Study ID; Site ID and Name; Patient Name and Alias; Visit Date, Name and Number; and the Procedures, Provider and Notes. This report may be helpful when presenting what happened at a specific patient visit.

Study Patient Totals

This report can provide the accrual numbers for every patient status (Screening, Failed, Randomized, On Study, Completed...), both current totals or for a specific date range (reporting period), as well as a grand total of all patients entered. If this is more information than required, the report can be customized to provide more focused data.

It is similar to a study patient enrollment log.

Study Patients by Name

This report provides a patient roster for the studies selected. It lists the patients by name and displays their study number, status, and most recent visit completed (name of visit and date).

Study Patients by Status

This report is similar to the Study Patients by Name report, but is formatted for easier review of status.

Study Summary by Arm: Visit

For multi-arm studies, this report provides a more detailed view than either the Study Patients by Name or by Status reports. It provides the dates that each study patient completed each study visit for each arm of the study. It is similar to a study patient tracking log.

Study Summary: Visit

For single arm studies, this report provides a more detailed view than either the Study Patients by Name or by Status reports. It provides the dates that each study patient completed each study visit. It is similar to a study patient tracking log.

Visit Checklist

The visit checklist can be printed out both from the Patient Module and the Report Builder module. The Visit Checklist report provides information for completed patient visits only. If the visit checklist is to be used for recording completion of procedures during a patient visit or for a source document for that visit, the report should not be used. Instead print out the checklist from the Patient Module, which provides space for recording information and a signature line.