1. Gaining access

New user:

Step 1: Email <u>CRU@mssm.edu</u> with the following information:

- Name
- Username
- Department
- Work phone number
- The GCOs for which you need access to schedule patients

Existing user:

Step 1: Email CRU@mssm.edu with the following information:

- Username
- The GCOs for which you need access to schedule patients

2. How to Submit a 'CRU

Visit Request'Access

a 'Study Screen'

Step 1: Log in to eRAP (<u>https://erap.mssm.edu</u>/). On the Homepage select 'Mount Sinai Operations' module icon.

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Home	InfoEd		Mount Sinai Operations		ff E-Learning Calendar s
External I					
Clinical S	pecimen Mar	nagemen	L System		https://pmrc.med.mssm.edu/elab/
Mount Sir	nai Data War	ehouse			https://msdw.mountsinal.org

Project Access Request

Account Settings

Step 2: Select "CRU Visit Requests" in the 'Project' dropdown. Depending on your access, "CRU VisitRequests" project may be your default setting

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Entry Se	creens proje	ct: CRU	Visit Reques	sts		Ŷ

Step 3: On the 'Entry Screen', the 'Study Search Results' grid provides the list of the studies you canrequest visits for along with the 'Study ID' access link.

Search V	Within CRU Visit R	equests				
n		1992.040				
Quick Se	arch					
Recent	101122101					
Custom	Search					
	Visit Request	ID		Reque	st Status	
	Patient Last Nar	me		Pati	ent MRN	
E Find	exact match?					
Lookup	Clear Fields					
	Clear Fields					
Lookup	Clear Fields					
Lookup Create St	Clear Fields tudy ch Results	PI	Coordinator Name	Coordinator Email	Coordinator Name	Coordinatar Email
Lookup Create St	Clear Fields tudy ch Results	PI PI3 Name		Coordinator Email Coordinator @mssm.edu		Coordinator Email

Please note, the 'Custom Search' section can be used further to search for previously submitted visits' requests records. (The detailed description of the 'Custom Search' fields is provided below in the 'View or Cancel an existing Visit Request' section of the help instructions.)

Click on the 'Study ID' link to access the 'Study Screen'.

Study ID	GCO #	PI	Coordinator Name	Coordinator Email	Coordinator Name	Coordinator Email
234937	11-3333	P13 Name	Coordinator 1	Coordinator @mssm.edu	Coord3	Coord3@mssm.edu
234692	11-1111	PI1 Name	Coordinator 1	Coordinator @mssm.edu	Coord2	Coord2@mssm.edu

Step 4: On the 'Study Screen', the 'Study Information' section populates the Study identifiers along with contact information for the study team. The 'Visit Request' grid provides the access links along with identifiers for all of the visits which were requested for the study.

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* - mark	s fields that are	required to save	the form.				
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	date 10/20/201		Last User gershet				
Stud	y Information						
	600 #	11-1111					
	Study Title						
		PI1 Name					
		PI1 Department	t				
		212-222-1111	-	1	Emergency nur	mber	
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	vest						
Visit Requ		1					
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a subscription of	Date of Visit (preferred)	Patient Last Name	Patient First Name	Patient DOB	Request		
Add New Visit Request	Date of Visit	Contraction and and a second s	Contraction of the second s	10/10/2002		12/2/2014	Confirmed
Add New Visit Request ID	Date of Visit (preferred)	Name	Name		Request	12/2/2014	Confirmed Cancelled

Place a NEW 'Visit Request'

Step 1: Click 'Add New Visit Request' button.

isit Requ	iest						
Add New	Visit Request	-					
Visit Request ID	Date of Visit (preferred)	Patient Last Name	Patient First Name	Patient DOB	Meal/Snack Request	Request Date	Request Status
49	12/12/2014	testpatnt	testpt	10/10/2002	No	12/2/2014	Confirmed
48	12/15/2014	testpatient	testpt	10/10/2002	Yes	12/2/2014	Cancelled

Step 2: On the 'Visit Screen', the 'Request Status' section provides the request information once it is submitted.

Note: You do not need to complete this section.

Entry Screens	Project:	CRU Visit Re	quests		~				
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	Visit Reque	st Information	For Study						^
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	⊜ vis	it Request I	formation						
		uest ID 0			12/09/2014		_		
	S	budy ID 2348	92	Last Update		Last User			
	E Req	uest Status							
		Request (Date			Request Status	New	~	
	Cr	onfirmed Visit	Day			Confirmed Visit Time			
	o	RU-Schedule I	iote						
					~				
					~				

The 'Patient Information' and 'Visit Information' sections, as well as the 'Dietary Needs' section (if applicable) must be filed out.

Patient previously seen at	~		
Patient Last Name		Patient First Name	
Patient DOB	1 EE	1 - 1925 W - 19 - 19 - 19 - 19 - 19 - 19 - 19 -	

Date of Visit (alternative 1) Date of Visit (alternative 2) Length of Visit (min) Visit Type (Check ALL that apply) Allergy/Immunology Pharmacokinetics Photoprovocation Physical Exam Scatterbed Space only Specimen processing Study Drug Administration Tanner Staging Vital signs Bloppy Dietary Consult ECG History/Physical Infant feeding IV placement	Date of Visit (alternative 1) Date of Visit (alternative 2) Length of Visit (min) Visit Type (Check ALL that apply) Allergy/Immunology Pharmacokinetics Photoprovocation Physical Exam Scatterbed Space only Specimen processing Specimen sampling Study Drug Administration Tanner Staging Vital signs Bloppy Dietary Consult ECG History/Physical Infant feeding	Date of Visit (preferred)	11	Time of Visit (preferred)	
Date of Visit (alternative 2) Image: Check ALL that apply) Length of Visit (min)	Date of Visit (alternative 2) Image: Check ALL that apply) Length of Visit (min)	Date of Visit (alternative 1)		Time of Visit (alternative	
Length of Visit (min) Visit Type (Check ALL that apply) Allergy/Immunology Pharmacokinetics Photoprovocation Physical Exam Scatterbed Space only Specimen processing Specimen sampling Study Drug Administration Tanner Staging Vital signs Biopsy Dietary Consult ECG History/Physical Infant feeding IV placement	Length of Visit (min) Visit Type (Check ALL that apply) Allergy/Immunology Pharmacokinetics Photoprovocation Physical Exam Scatterbed Space only Specimen processing Specimen sampling Study Drug Administration Tanner Staging Vital signs Blopsy Dietary Consult ECG History/Physical Infant feeding IV placement Lumbar puncture	Date of Visit (alternative 2)		Time of Visit (alternative	
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			Pharmacokinetics Photoprovocation Physical Exam Scatterbed Space only Specimen processing Study Drug Administration Tanner Staging Vital signs Biopsy Dietary Consult ECG History/Physical Infant feeding IV placement		
Visit Number/Day (if applicable)		Visit Comments			1
Visit Number/Day (if applicable)	Visit Comments	Meal/Snack Request	Yes	v	
		Dietary Needs			
Visit Comments Meal/Snack Request Yes	Meal/Snack Request	Dietary Specific Norma Requirements	il diet 🗸 🗸	Dietary Special Requests/Comments	
Visit Comments Visit Comments Meal/Snack Request Yes Dietary Needs Dietary Specific Normal diet Dietary Specific					

The 'Notes' section provides reminder for submitting.

Review the Patient and Visit Information before Submitting this Request.	
Press 'Save' to Submit this Request.	
The Information cannot be changed for a Submitted Request.	

Step 3: Please review information in all sections and click on the 'Save' button to submit the visit request.

	RU Visit Requests	~	
Save	Full View Print View	2	
Visit Request			

Please note: The Information cannot be changed for a Submitted Request.

Step 4: Once the visit request is submitted, its status (in the 'Request Status' section) will be changed accordingly, and a corresponding email will be sent to 'Schedule-CRC'.

You will receive a notification email with the information regarding the submission of the request.

Step 5: Once the Visit is scheduled and confirmed by CRU, the 'Request Status' information will be updated to "Confirmed", and you will receive a final confirmation email.

Note: If the Visit cannot be scheduled, its status will be changed to '**Not Confirmed**', and you will receive a notification email with the 'Schedule-CRC' notes and recommendations. You will need to place a NEW Visit Request.

View or Cancel an existing 'Visit Request'

View an existing 'Visit Request'

Step 1: On the 'Entry Screen', the 'Custom Search' section provides fields to search for the particular visits' requests records which were previously submitted for the study. The visits' records can be quickly looked up by either one of the criteria: 'Visit Request ID', 'Request Status', Patient Last Name', and 'Patient MRN'.

Search Within CRU Visit Requests		
Quick Search		
Recent 250		
Custom Search		
Visit Request ID	Request Status	•
Patient Last Name	Patient MRN	
Search Options		
Find exact match?		

The search result will provide the 'Visit Request Search Results' grid with the list of all study's visits matching to the specified criteria.

	Search Visit Request	10			Consumpt Sta	tus Confirmed	
		223					
	Patient Last Nar	ne [test]			Patient P	ann	
Search C	ptions						
	exact match?						
Lookup	Clear Fields						
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isit Reque Visit	st Search Results Date of Visit	Patient Last	Patient First	Patient DDB	Heal/Snack	Request Date	Request State
isit Reque	st Search Results	Contract of the second s	Patient First Name	Patient DOB	Meal/Snack Request	Request Date	Request Stat
isit Reque Visit Request	st Search Results Date of Visit	Patient Last		Patient DDB		Request Date	Request State
isit Reque Visit Request ID	st Search Results Date of Visit (preferred)	Patient Last Name	Name		Request		
isit Reque Visit Request ID 36	st Search Results Date of Visit (preferred) 11/10/2014	Patient Last Name Testot	Name Test	10/1/2010	Request	10/28/2014	Confirmed
isit Reque Visit Request 10 36 41	st Search Results Date of Visit (preferred) 11/10/2014 11/24/2014	Patient Last Name Testpt testptn	Name Test test	10/1/2010 11/4/1990	Request No Yes	10/28/2014 11/13/2014	Confirmed

Note: To retrieve the list of ALL study's visits, click on the 'Study ID' link in the 'Study Search Results' grid to access the 'Study Screen'.

Study ID	GCO #	PI	Coordinator	Coordinator Email	Coordinator Name	Coordinator Ema
234937	11-3333	P13 Name	Coordinator 1	Coordinator @mssm.edu	Coord3	Coord3@mssm.ed
234892	11-1111	PI1 Name	Coordinator 1	Coordinator @mssm.edu	Coord2	Coord2@mssm.er

Step 2: Click on the 'Visit Request ID' link in the 'Visit Request' grid to view an existing 'Visit Request' record on the 'Visit Screen'.

isit Requ	Jest						
Add New	Visit Request						
Visit Request ID	Date of Visit (preferred)	Patient Last Name	Patient First Name	Patient DOB	Meal/Snack Request	Request Date	Request Status
49	12/12/2014	testpatnt	testpt	10/10/2002	No	12/2/2014	Confirmed
48	12/15/2014	testpatient	testpt	10/10/2002	Yes	12/2/2014	Cancelled

The existing 'Visit Request' information cannot be changed.

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Visit Request Information For Stu	ω¥				
Field legend					
- marks fields that are not - marks fields that are req	20 KT 40 KK 0 KK KT 7 KK 40 KK				
r ⊟ Visit Request Informa	tion				
Visit Request ID 48	Entry Dat	e 12/2/2014			
Study ID 234892	Last Updat	e 12/2/2014	Last User demo		
-S. Desmark Chatra					
Request Status					
Request Date 12/2	2014		Request Status	Cancelled	
Confirmed Visit Day 12/1	7/2014		Confirmed Visit Time	lon	
CRU-Schedule Note					
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Patient previously seen at y			Patient First Name	ector	
Patient previously seen at y	tpatient	•	Patient First Name Patient MRN	estpt 1222222	
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Please note: If for ANY reason the Visit Request has to be changed: the existing request has to be canceled, and a new request has to be placed.

Cancel a submitted/confirmed 'Visit Request'

Step 3: Click on the 'Visit Request ID' link at the 'Visit Request' grid to access the 'Visit Screen'. Scroll down to the 'Visit Cancelation' section. Select "Yes" in 'Cancel Visit' dropdown and provide a 'Cancelation Reason'.

Cancel Visit		
	Yes 🗸	
Cancelation Reason	atient needs to reschedule.	

Click on the 'Save' button to submit the visit cancelation.

Entry Screens	Project:	CRU Visit Requests	٠			
	Save	Compact View Print View	1	9 7		
	Visit Reques	t Information For Study				

Step 4: Once the visit cancelation is submitted, the corresponding email will be sent to 'CRU-Schedule'. As soon as the Visit is canceled, the 'Request Status' information will be updated, and you will receive a confirmation email regarding the cancelation of the request.