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.

6	infoEd	8	Mount	Mount Sinal	. 🜆 🔟
Home	InfoEd	Human Rasearch	Mount Sinai Operations	Sellkoff Centers	F E-Learning Calendar s
External I	Links				
Clinical S	pecimen Mar	nagemen	L System		https://pmrc.med.mssm.edu/elab/
Mount Sir	nai Data War	ehouse			https://msdw.mountsinai.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

Usir Dem	n),					
6	infoEd	8	Mount	Mount	1	11
Homa	InfoEd	Human Research	Mount Sinal Operations	Selkoff Centere	E-Learning	Calendar
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				
r . Historetet		676-149 I.				
Quick Se	arch					
Recent	250					
Custom	Search					
	Visit Request	ID		Reque	st Status	
	Patient Last Nan	ne		Pati	ent MRN	
Lookup	Clear Fields					
Lookup Create St	Clear Fields					
Lookup Create St	Clear Fields					
Lookup Create St Study Sear Study ID	Clear Fields	PI	Coordinator Name	Coordinator Email	Coordinator Name	Coordinatar Email
Lookup Create Si Study Sear Study ID 234937	Clear Fields	PI PI3 Name	Coordinator Name Coordinator 1	Coordinator Email Coordinator @mssm.edu	Coordinator Name Coord3	Coordinator Email Coord3@mssm.edu

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.

5	tudy Coord	inators All					
Field	legend						
- mark	s fields that are	not required but	important to fill o	ut.			
* - mario	s fields that are	required to save	the form.				
B Mast	er Record Info	emation					
Stud	y ID 234892	Đ	ntry Date 6/21/20	14			
Last Up	date 10/20/201	4	ast User gershet	1			
	the state of the s		10				
Stud	y Information						
	GC0 #	11.1111					
	Study Title	Trie 1					
	PI	PI1 Name					
	Department	PI1 Department	t				
	Phone Number	212-222-1111		1	Emergency nur	mber	
		-		÷			
	Jest	6					
Visit Requ							
Visit Requ Add New	Visit Request			and the second s	Meal/Snark	Request Date	Request Statu
Visit Requ Add New Visit Request ID	Visit Request Date of Visit (preferred)	Patient Last Name	Patient First Name	Papent DOS	Request		
Visit Requ Add New Visit Request ID 49	Visit Request Date of Visit (preferred) 12/12/2014	Patient Last Name testpatnt	Patient First Name testpt	10/10/2002	Request	12/2/2014	Confirmed
Visit Requ Add New Visit Request ID 49 48	Visit Request Date of Visit (preferred) 12/12/2014 12/15/2014	Patient Last Name testpatnt testpatient	Patient First Name testpt testpt	10/10/2002 10/10/2002	Request No Yes	12/2/2014	Confirmed Cancelled

Place a NEW 'Visit Request'

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

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 R	quests		~				
	Save		Full View	Print View	7				
	Visit Reque	st Information	For Study						^
	🗏 Fiel	d legend							
	* - ma * - ma	rks fields that rks fields that	are not required are required to s	but important b ave the form.	o fill out.				
	⊜ vis	it Request I	oformation						
	Visit Req	uest ID 0		Entry Date	12/09/2014				
	5	budy ID 2048	92	Last Update		Last User			1
	E Req	uest Status							
		Request I	Date			Request Status	New	~	
	Cr	onfirmed Visit	Day			Confirmed Visit Time			
	o	RU-Schedule I	lote						
					\sim				
					~				

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 12	1. March 1. Constant 1995	

Date of Visit (preferred)	EE	Time of Visit (preferred)	
Date of Visit (alternative 1)	121	Time of Visit (alternative	
Date of Visit (alternative 2)	B	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 Study Drug Administration Tanner Staging Vital signs Biopsy Dietary Consult ECG History/Physical Infant feeding		
	Invaric recomp IV placement Lumbar puncture		
Visit Number/Day (if applicable)	C) that plucose tolerance test		
Visit Comments			-i
Meal/Snack Request	Yes 🗸		
Dietary Needs			
Dietary Specific Norma Requirements	l diet 🗸 🗸	Dietary Special Requests/Comments	

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.

intry Screens	Project: CRU Vis	it Requests		~
	Save	Full View	Print View	2
	Visit Request Inform	ation For Study		

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.

	Visit Dequest	10			Consumpt St.	due la company	
	Patrice Legelse	10			Request sta	[Confirmed]	
	Patient Last Nar	Itest		12	Patrent	an a	
Search C	ptions						
E Find	exact match?						
Lookup	Clear Fields						
Provide Da	5451]						
Create St	udy						
Create St	udy	í.					
Create St fisit Reque Visit	udy st Search Results Date of Visit	Pabent Last	Patient First	Patient DDB	Heal/Snack	Request Date	Request State
Create St Tisit Reque Visit Request ID	udy est Search Results Date of Visit (preferred)	Patient Last Name	Patient First Name	Patient DOB	Meal/Snack Request	Request Date	Request Stati
Create St fisit Reque Visit Request ID 36	udy st Search Results Date of Visit (preferred) 11/10/2014	Patient Last Name	Patient First Name Test	Patient DDB	Meal/Snack Request No	Request Date	Request State
Create St fisit Reque Visit Request 1D 36 41	udy st Search Results Date of Visit (preferred) 11/10/2014 11/24/2014	Patient Last Name Testpt testptn	Patient First Name Test test	Patient DDB 10/1/2010 11/4/1990	Meal/Snack Request No Yes	Request Date 10/28/2014 11/13/2014	Request State
Create St fisit Reque Visit Request 10 36 41 49	udy st Search Results Date of Visit (preferred) 11/10/2014 11/24/2014 12/12/2014	Patient Last Name Testpt testptn testpatnt	Patient First Name Test test testpt	Patient DDB 10/1/2010 11/4/1990 19/10/2002	Meal/Snack Request No Yes No	Request Date 10/28/2014 11/13/2014 12/2/2014	Request State Confirmed Confirmed Confirmed
Create St fisit Reque Visit Request ID 36 41 49 50	udy st Search Results Date of Visit (preferred) 11/10/2014 11/24/2014 12/12/2014 12/12/2014	Patient Last Name Testpt testptn testpatnt testpatnt	Patient First Name Test test testpt testpt	Patient DDB 10/1/2010 11/4/1990 10/10/2002 10/10/2002	Meal/Snack Request No Yes No	Request Date 10/28/2014 11/13/2014 12/2/2014 12/2/2014	Request State

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 Name	Coordinator Email	Coordinator Name	Coordinator Email
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.ed

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'.

Visit 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	
42	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.

list Remark Information For	Study					
lisit Request Information For (study					
Field legend						
- marks fields that are - marks fields that are	not required but i required to save t	mportant t he form.	to fill out.			
r S Visit Request Infor	mation					
Visit Request ID 48	1	Entry Date	12/2/2014			
Study ID 234892	L	est Update	12/2/2014	Last User demo		
-S. Barrish Chattan						
- Request status						
Request Date 1	12/2/2014			Request Status	Cancelled	
Confirmed Visit Day	12/17/2014			Confirmed Visit Time	Lon	
STATE AND A STATE AND A					agen	
CKO-Schedule Note						
				de la		
Patient Information				_A		
Patient Information Patient previously seen at MSH	Yes		•			
Patient Information Patient previously seen at MSH Patient Last Name Patient COB	t Yes testpatient		•	Patient First Name	testpt	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB	t Yes testpatient 10/10/2002		×	Patient First Name Patient MRN	testpt 1222222	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB	t Yes testpatient 10/10/2002		V	Patient First Name Patient MRN	testpt 1222222	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB Visit Information Date of Visit (pref	testpatient 10/10/2002	4	•	Patient First Name Patient MRN Time of Visit (prefer	testpt 1222222 Ted) 1pm	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB Visit Information Date of Visit (pref Date of Visit (alternal	restpatient 10/10/2002 (erred) 12/15/201 tive 1) 12/17/201	4		Patient First Name Patient MRN Time of Visit (prefer Time of Visit (altern	red) Ipm 1)	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB Visit Information Date of Visit (pref Date of Visit (alternal Date of Visit (alternal	testpatient 10/10/2002 ferred) 12/15/201 tive 1) 12/17/201 tive 2) 12/18/201	4 4		Patient First Name Patient MRN Time of Visit (prefer Time of Visit (altern Time of Visit (altern	testpt 1222222 ative 1pm 1) ative 1pm 2)	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB Visit Information Date of Visit (pref Date of Visit (alternal Date of Visit (alternal Date of Visit (alternal Length of Visit	ferred) 12/15/201 ferred) 12/15/201 fitive 1) 12/17/201 titve 2) 12/18/201 t (min) 60	4	•	Patient First Name Patient MRN Patient MRN Time of Visit (prefer Time of Visit (altern Time of Visit (altern	red) 1pm ative 1pm 2) 2)	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB Visit Information Date of Visit (pref Date of Visit (alternal Date of Visit (alternal Date of Visit (alternal Length of Visit Visit Type (Check ALL that	t Yes testpatient 10/10/2002 ferred) 12/15/201 tive 1) 12/17/201 tive 2) 12/18/201 t (min) 60 apply) Physici	4 4		Patient First Name Patient MRN Time of Visit (prefer Time of Visit (altern Time of Visit (altern	red) 1pm ative 1pm 2) 1) 1) 1) 1) 1) 2)	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB Visit Information Date of Visit (pref Date of Visit (alternal Date of Visit (alternal Date of Visit (alternal Length of Visit Visit Type (Check ALL that	testpatient 10/10/2002 ferred) 12/15/201 tive 1) 12/17/201 tive 2) 12/18/201 t (min) 60 apply) @ Physics @ Oral gl	4 4 4 Al Exam	Trance test	Patient First Name Patient MRN Time of Visit (prefer Time of Visit (altern Time of Visit (altern	red) Ipm ative Ipm 2) 1 2)	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB Visit Information Date of Visit (pref Date of Visit (alternal Date of Visit (alternal Length of Visit Visit Type (Check ALL that	testpatient 10/10/2002 ferred) 12/15/201 tive 1) 12/17/201 tive 2) 12/18/201 t (min) 60 apply) @ Physic @ Oral g Allergy	4 4 4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	rance test	Patient First Name Patient MRN Time of Visit (prefer Time of Visit (altern Time of Visit (altern	red) Ipm ative Ipm 1) 2) 2) 1) 2)	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB Visit Information Date of Visit (pref Date of Visit (alternal Date of Visit (alternal Length of Visit Visit Type (Check ALL that	testpatient 10/10/2002 (erred) 12/15/201 (tive 1) 12/17/201 tive 2) 12/18/201 tive 2) 12/18/201 t (min) 60 apply)	4 4 4 il Exam lucose tole v/Immunoli acokinetics	rance test ogy	Patient First Name Patient MRN Time of Visit (prefer Time of Visit (altern Time of Visit (altern	red) 1pm ative 1pm 1) 2) 2)	
Patient Information Patient previously seen at MSH Patient Last Name Patient DOB Visit Information Date of Visit (pref Date of Visit (alternal Date of Visit (alternal Length of Visit Visit Type (Check ALL that	rerred) 12/15/201 (erred) 12/15/201 (tive 1) 12/17/201 (tive 2) 12/18/201 (tive 2) 12/18/201 (min) 60 apply) Physic Oral gi Allergy Pharton Photon	4 4 4 4 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	rance test	Patient First Name Patient MRN Time of Visit (prefer Time of Visit (altern Time of Visit (altern	red) 1pm ative 1pm 1) 1pm 2)	

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'.

Country 1		
Cancel Visic	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.