

THE UNIVERSITY OF TEXAS HEALTH SCIENCE CENTER AT SAN ANTONIO

# Work Instruction Patient Registration

Velos - eResearch v10.0



Version: 1.0, 02/16/2018

## Work Instruction Patient Registration

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Revision History			
Version/Amendment #:	Version Date:	Description:	Completed By:
Version 1.0	02/16/2018	Initial Release	VPR CTO

Documentation of Change History:

Version 1.0, 02/16/2018: VPR CTO initial release of version 10.0 work instructions;

# Work Instruction Patient Registration

## PURPOSE

The purpose of this work instruction is to walk users through the process of searching for existing patients and adding new patients to Velos eResearch database.

## RESPONSIBILITY

As a study has been opened for patient enrollment, a designated member of the Research Team, such as a Research Nurse or Study Coordinator, shall be responsible for adding patients to the study. This includes searching in eResearch and the Epic EMR to identify existing patients.

## ENTRY/PREREQUISITE CRITERIA

Prior to performing the tasks described in this work instruction, the following must be completed:

- The Study Set up has been completed within eResearch
- The Coverage Analysis has been completed
- The Study Calendar, Budget and Milestone builds have been fully completed and are set to active
- The Study has reached all requirements to ascertain IRB Approval and Institutional Approvals
- The Study Status is set to “Active” and “Open to Enrollment”.
- The Research Team members have been added to the Study Team tab

## REFERENCE DOCUMENTS

N/A

## WORK INSTRUCTIONS

Role/Function	Description of Action
<i>Research Team</i>  <i>Search for an Existing Patient</i>	<p> Velos eResearch will first search its own database to find a patient record. If the patient is not found, the search can be extended to look into the Epic database.</p> <ol style="list-style-type: none"><li>1. Log into eResearch</li><li>2. Click the <b>MANAGE</b> button from the toolbar menu and select <b>SEARCH</b> under the <b>PATIENTS</b> option.</li><li>3. On the <b>Patient Search</b> page <b>ENTER</b> your search criteria and <b>SELECT</b> the <b>SEARCH</b> button. You may search using the following options<ol style="list-style-type: none"><li>a. Velos Patient ID (EPIC MRN)</li><li>b. Gender</li><li>c. Date of Birth</li><li>d. First Name</li><li>e. Middle Name</li><li>f. Last Name</li></ol></li></ol> <p> <b>NOTE:</b> Click the <b>RESET</b> button at any time to clear your search criteria.</p>

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Refer to the following screenshot when searching for an existing patient.

Research Team

*Patient Record Found in eResearch*

If the search finds the correct patient record, the patient is already registered within eResearch. **Verify** Demographics for patient are correct.

1. **Select** the patient by **clicking** on the appropriate **Patient ID** that is a hyperlink that appears in the Patient ID column. This loads the **Manage Patients>>Demographics** page.
2. On the **Demographics** page **enter** any missing data for REQUIRED fields that may be found. (Required fields are marked with a red asterisk).
3. **Enter** a “Reason for change” (FDA Audit) if corrections or revisions have been made to Demographics information.
4. **Enter** your **e-Signature** and select the **SUBMIT** button to save the data.

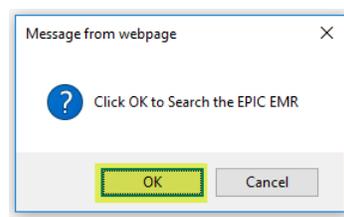
Research Team

*Patient Record is Not Found in eResearch – Search Epic*

1. If your search displays a patient list, but you cannot find the specific patient you are searching for, extend your search to the EPIC EMR by clicking on the [Continue to Search in EPIC EMR](#) link.

PATIENT ID	First Name	Middle Name	Last Name	Date of Birth	Gender
10120982	PATIENT	DECEMBER	CADENCE	01/01/1980	Female
10120981	PATIENT		CADENCE	10/02/1965	Male
10121215	PATIENT	GIBL	CADENCE	06/04/1953	Female
10120841	PATIENT	JACOB	CADENCE	12/10/1964	Male
10120842	PATIENT	BRANDON	CADENCE	12/10/1965	Male

2. If the search did not find any patients matching your search criteria, **click** on the **OK** button, when the **Search the EPIC EMR** pop up window appears.



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<p><i>Patient Record is Not Found in eResearch – Search Epic (cont.)</i></p>	<ol style="list-style-type: none"> <li>3. From the list of patient record(s) that is displayed, <b>select</b> the correct patient by <b>clicking</b> on the appropriate <b>Patient ID</b> which appears as a hyperlink in the Patient ID column.</li> <li>4. <b>Verify</b> Demographics for patient are correct, and make updates as needed.</li> <li>5. To <b>register</b> the patient record into the Velos eResearch database, <b>enter</b> your <b>e-Signature</b> and select the <b>SUBMIT</b> button.</li> </ol>
<p><i>Research Team</i></p> <p><i>Patient Record is Not Found in eResearch or Epic</i></p>	<p>If the Epic EMR search does not return any matching records the “No Records Found” message will appear.</p> <ol style="list-style-type: none"> <li>1. If there is a chance you may have entered incorrect search criteria, Click the RESET button to search try again.</li> </ol>  <ol style="list-style-type: none"> <li>2. If a second search does not result in the patient you are searching for, contact <a href="mailto:CTMS-Support@uthscsa.edu">CTMS-Support@uthscsa.edu</a> to initiate the process for adding a new patient into Epic.</li> </ol> <p>✉ When contacting <a href="mailto:CTMS-Support@uthscsa.edu">CTMS-Support@uthscsa.edu</a>, provide the patient name and date of birth. If you only have a UHS Sunrise MRN, please provide it. Remember to include ++ in the subject line to protect PHI if you are not within the UTHSCSA domain.</p>

### EXIT CRITERIA

Upon completion of these work instructions, patients will be registered in Velos with the required demographic information. The next work instruction to reference will be Assigning Patients to a Study.

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## APPENDIX A: ROLES & RESPONSIBILITIES

RACI Chart	Study Entry Team	Research Team	
		Principal Investigator	Research Team
<b>PATIENT MANAGEMENT</b>			
<b>-Patient Registration</b>			
-Search for an Existing Patient	C	A,R,I	R
-Correct Patient Record is Found in eResearch	C	A,R,I	R
-Patient Record is Not Found in eResearch	C	A,R,I	R
-Patient Record is Not Found in Epic	C	A,R,I	R
-Registering a New Patient	C	A,R,I	R

R = Responsible party

A = Accountable party

C = consulting party

I = party to be kept informed

**END OF DOCUMENT**