CRFManager User Testing Week

- Testing Week - Section 1
- Testing Week - Section 2
- Testing Week - Section 3

Testing Week - Section 1

Manual Study Creation

Basic Study creation with minimum fields possible. Advanced Study creation with set-by-step guide for all study fields.

https://cdnapisec.kaltura.com/p/2010292/embedPlaykitJs/uiconf_id/55171522?iframeembed=true&entry_id=1_p6a7r6rq&config%5Bprovider%5D=%7B%22widgetId%22%3A%221_ekpn04jl%22%7D

Study Import

How to import a study from an iCT/NCVR spreadsheet. Importing the visit schedule and the costs. Importing participant, unscheduled and study costs.

https://cdnapisec.kaltura.com/p/2010292/embedPlaykitJs/uiconf_id/55171522?iframeembed=true&entry_id=1_1jc4my2u&config%5Bprovider%5D=%7B%22widgetId%22%3A%221_nucfqngv%22%7D

Visit Templates & Treatment Arms

How to view, edit and add visit-templates. How to view and export activities and costs associated with visit templates. How to manage treatment arms.

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Study Activities and Costs

How to view the system-wide activities and associated costs. How to add additional activities. How to add activities and costs to a study and visit templates. Adding unscheduled activities to a visit. Exporting the visit-costs.

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Occupancy Report

How to run, view and export the occupancy report. Note that an explanation of occupancy calculations is not included in this video.

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Resources (Availability and Closures)

How to find Rooms and Equipment. How to set their availability and add room or equipment closures.

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Testing Week - Section 2

Scheduler Layout and Settings

This section will be taking a look at how to navigate through our new scheduler.

Layout

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Scheduler Settings

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Resource Availability

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View All Bookings

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> Please note that the system and some of its features are still in development and will continue to be improved upon. All feedback is welcomed.

Creating a Booking

There are two types of bookings that can be created in the system, a resource only booking and a participant booking. This Section will go over how to create them and how to add your resources to them.

> **Please remember that this is a test environment so no identifiable information should be used during this test week when creating bookings or Participants.**

Resource Only Booking

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Participant Booking

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Adding New Participants

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> Please note that the system and some of its features are still in development and will continue to be improved upon. All feedback is welcomed.

Completing a booking with Particiant Stages

Participant stages is the new way to record your particpants milestones as they attend visits throughout the course of your studies. These events are recorded at the time on a visit booking completion and

- When completing a booking for a visit template that has any of the following events, the system records the visit date as the participant's event date: **Pre Screening, Screening, Consent, Baseline, Randomisation, Treatment Started, Treatment Ended, Follow up Started, Follow up Ended**.
- When completing a booking that has the **Recruitment** event, the system will also record the visits location as the recruitment location for this participant.

When completing a booking that has participant events on the visit, you can set the outcome, the date and any comments you wish for each event on the visit.

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> Please note that the system and some of its features are still in development and will continue to be improved upon. All feedback is welcomed.

Visit Planner

The visit planner is a feature that allows you to view all visits on a study at once and shows each participants journey through the study. This is a quick and easy tool to view partipant studies at a glance and allows you to manage participant bookings for a selected study.

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> Please note that the system and some of its features are still in development and will continue to be improved upon. All feedback is welcomed.

Testing Week - Section 3

Milestones

This new feature allows you to track your progress through any study.

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Custom Forms

This feature allows you to create your own custom forms for studies.

Please note that the location of the Custom Forms menu item has been changed and can now be found under My Facility.

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Tasks

This feature allows you to create to do lists for yourself and other users in the system to support the day to day workload.

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Global Search

This feature supports easy navigation around the system.

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List Filtering and Data Export

An introduction and overview of lists, filters and exports.

1. How to configure meaningful lists.
2. How to use list search and filters.
3. How to build custom exports.

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