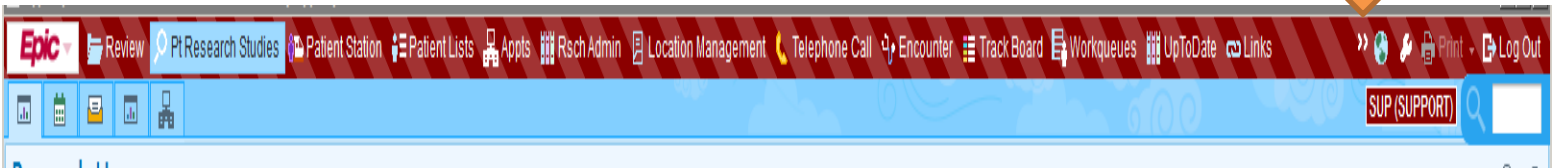


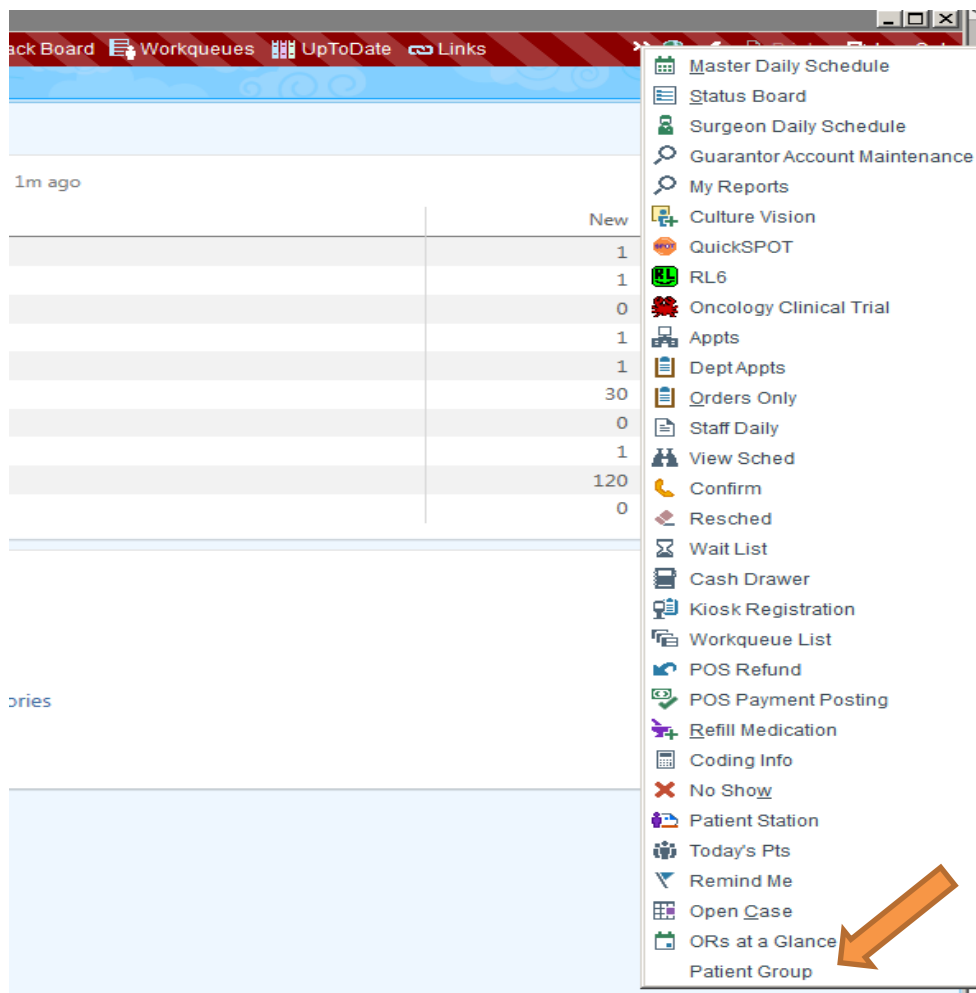
Updating the Patient List (Research Request)

*If you have not been given access to this function; Submit a [General WakeOne Service Request](#) > Epic Module (assign to) – **EPIC Security***

1. Click on the double **Arrows** across the top bar >>

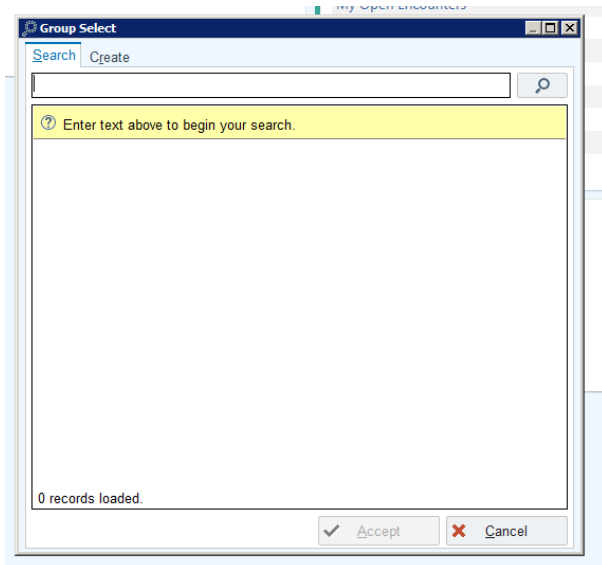


2. In the drop-down menu, select "**Patient Group**";



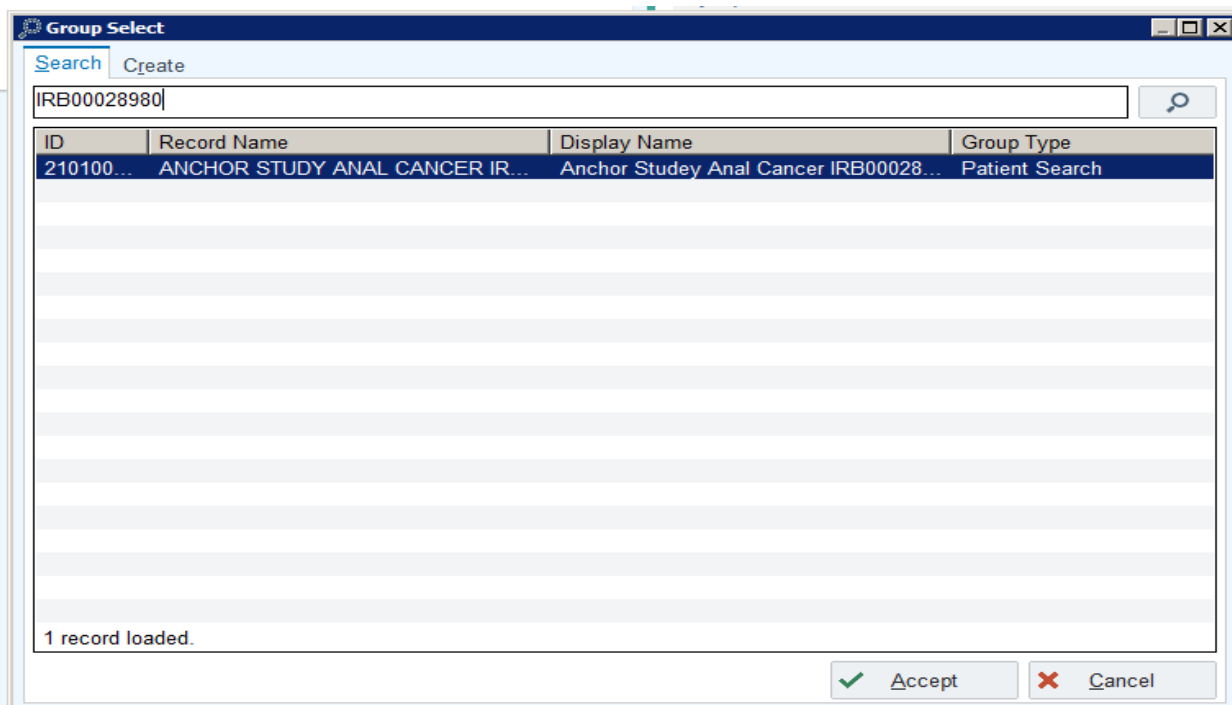
Updating the Patient List (Research Request)

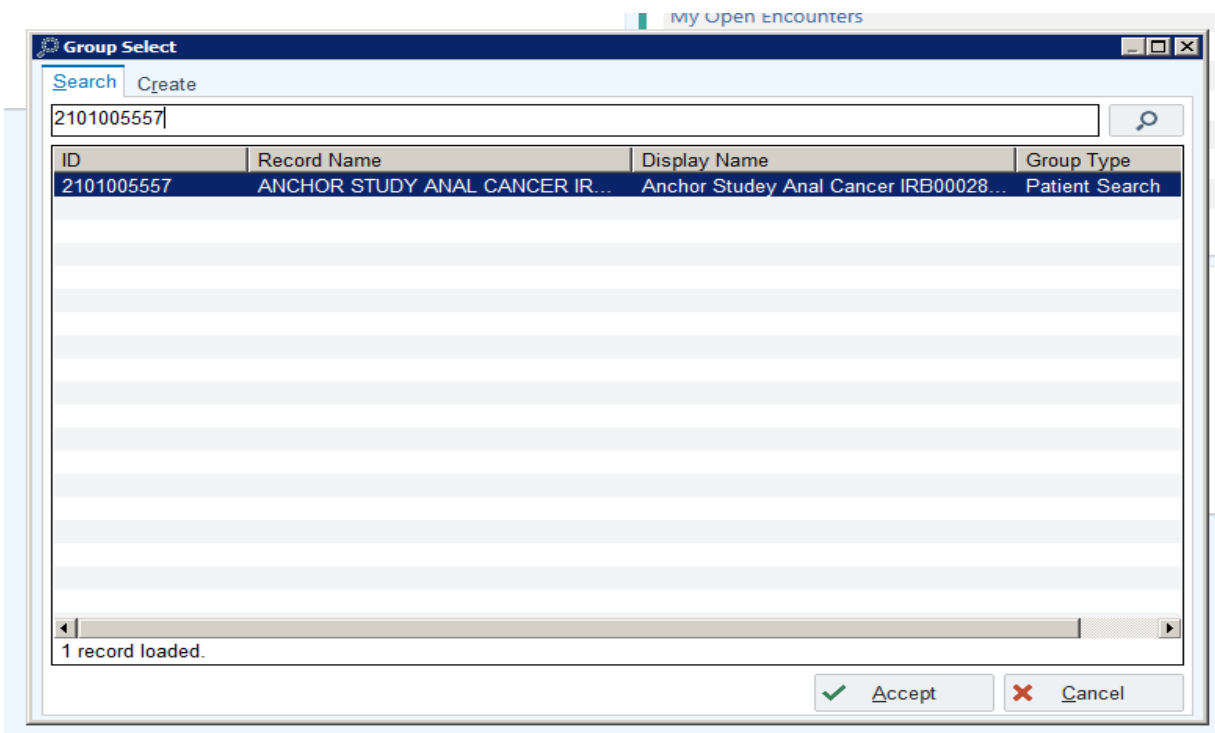
3. A search bar will appear like below;



4. You have 2 options to pull up your group;

- Search directly by the **Patient Group#**, given to you when the Monitor was given access (i.e. -2101008451) *click on the magnify glass to search after entering the number.*
- Or, you can start typing the IRB# in full (i.e.) IRB0000000. *click on the magnify glass to search after entering the number.*
- Searched will appear like either screen below. Click **Accept** to enter the group:





- The next screen appears as the actual Patient Group: **(Verify by name this is your correct study before proceeding)**

Patient Group - ANCHOR STUDY ANAL CANCER IRB00028980 PATIENT GROUP [2101005557]

Group name: ANCHOR STUDY ANAL CANCER IRB00028980 PATIE Aliases: 1 IRB00028980
2

Display name: Anchor Studesy Anal Cancer IRB00028980 Patient Gro

General Tags Patients

User contexts:

1	ANCHOR STUDY ANAL CANCER IRB00028980 [2100005557]
2	

Add/Edit User Contexts

Pool for reports:

Event Monitor profile:

Event Monitor allowed private flags:

1	
---	--

Exempt from Site Verification

Updating the Patient List (Research Request)

6. Click on the “Patients” tab:

Patient Group - ANCHOR STUDY ANAL CANCER IRB00028980 PATIENT GROUP [2101005557]

Group name: ANCHOR STUDY ANAL CANCER IRB00028980 PATIE Aliases: 1 IRB00028980
2

Display name: Anchor Studesy Anal Cancer IRB00028980 Patient Grou

General Tags Patients

Showing rows for patient Brantley, Yvette [639901]

Patient	From	To	Restr?	Type	Comment
1	9/20/2017	9/20/2020			
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					

Remove Patient
Add Patient

Accept Cancel

7. Here you verify all the patients that should be associated with this study *and/or* add them.
 - a. For existing patients; Verify if the “To” date is what you prefer. This is the date the patient will **end from this list** and no longer be on this study. If you need to update this date or leave it blank- edit directly in the “To” field. Replace the date with a new date or delete the date & leave it blank for now (for patients who will need to be on this study for a lengthy time).

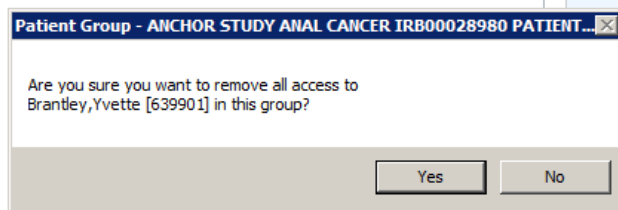
Updating the Patient List (Research Request)

8. To Remove a patient;

- a. Highlight the patient name in the list.
- b. At the bottom of the screen click "Remove Patient" button:

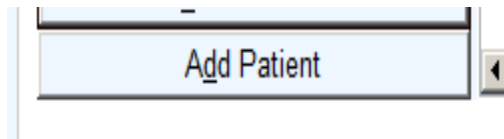


- c. Select YES, when prompted "Are you sure..."



9. To Add a Patient:

- d. Click "Add Patient" from the bottom of the Patient Group Box:



- e. Patient Lookup Box Appears.
- f. Enter the Patient Name/MRN in first section > Click **Accept/Enter**

A screenshot of the "Patient Lookup" dialog box. It has two tabs: "Patient Search" (selected) and "Recent Patients". The "Patient Search" tab contains several input fields: "Name/MRN:" (highlighted with a blue border), "EPI ID:", "SSN:", "Sex:", "Birth Date:", "Zip Code:", and "Phone #:". There are also checkboxes for "Use sounds-like" and "My patients". At the bottom, there are buttons for "Find Patient", "Clear", "Accept", and "Cancel". An orange arrow points from the "Add Patient" button in the previous image to the "Name/MRN:" field.

- g. **Make sure you are selecting the correct patient from the list, if more than one appears.**

- h. Patient will then add as the last patient in the list.
- i. **Repeat Steps 3 thru 7, for as many patients you need added.**

2. Once all changes additions, edits have been made in the Patient Group > **Click Accept.**
3. This saves all changes and exits the Patient Group.

