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”;
3. **A search bar will appear like below;**

![Search Bar Image]

4. **You have 2 options to pull up your group:**
   a. 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.*
   b. Or, you can start typing the IRB# in full (i.e.) IRB00000000. *click on the magnify glass to search after entering the number.*
   c. Searched will appear like either screen below. Click **Accept** to enter the group:

![Search Result Image]
5. The next screen appears as the actual Patient Group: *(Verify by name this is your correct study before proceeding)*
6. Click on the “Patients” tab:

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).
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
   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.