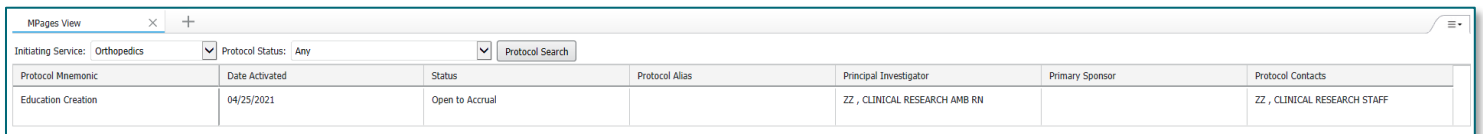


The Research Organizer worklist MPage brings protocol and patient-related clinical trial activities into a centralized location, allowing the ability to execute clinical trial activities from a single worklist.

Research Organizer Worklist MPage Overview

The Research Organizer worklist provides the following capabilities:

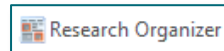
- A summary of roles, milestones, and other amendments added to a protocol
- The ability to enroll patients on a selected protocol.
- A list of all patients who are or have been enrolled on a selected protocol.
- The columns display different information about the protocol in one view.



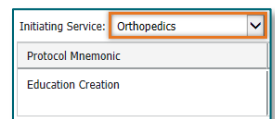
Protocol Mnemonic	Date Activated	Status	Protocol Alias	Principal Investigator	Primary Sponsor	Protocol Contacts
Education Creation	04/25/2021	Open to Accrual		ZZ, CLINICAL RESEARCH AMB RN		ZZ, CLINICAL RESEARCH STAFF

Enrolling Patients into a Study


STEP 1: In PowerChart, click **Research Organizer** in the toolbar.



STEP 2: Select the applicable **Initiating Service** from the list and locate the protocol that you wish to enroll patients in.



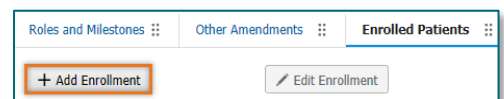
STEP 3: Click in the cell with the name of the protocol and the display pane opens to the right of the screen with more details of the protocol.



Education Creation					
Amendment: Initial Protocol Date Activated: 04/25/2021 Status: Open to Accrual Principal Investigator: ZZ, CLINICAL RESEARCH AMB RN					
Roles and Milestones					
Pro Contact	Name	Role	Position	Organization	Role Type
	ZZ, CLINICAL RESEARCH AMB	Principal Investigator			Personal
	ZZ, CLINICAL RESEARCH STAFF	Coordinating Institution		EMHC	Organizational
		Creator			Personal
Snd No.	Activity	Responsible Party	Date Completed		
1	Activated		04/25/2021		
2	Approved		04/25/2021		
3	Closed				

- **Roles and Milestones:** Information of Roles and Milestones of the protocol can be viewed here.
- **Other Amendments:** Amendments to the protocol can be found here.
- **Enrolled Patients:** Displays a list of all patients who are enrolled in the protocol.

STEP 4: Click the **Add Enrollment** button.



STEP 5: Patient search window will open.

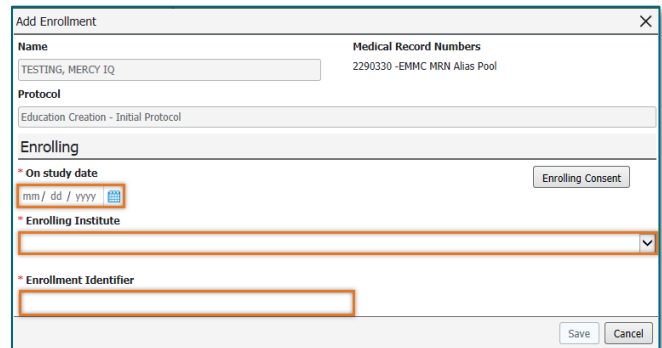
- Search for the patient to enroll on the study.

STEP 6: Select the patient's name and click **OK**.

- The **New Enrollment** window appears.

STEP 7: When prompted, enter the enrollment information.

- Enter the applicable **On Study Date**.
- **Enrolling Institution:** Select the organization from the drop-down list that was chosen when the protocol was created.
- **Enrollment Identifier:** Enter the enrollment identifier you will assign to the patient on the study.



STEP 8: Click **Save** to close the **New Enrollment** dialog box.

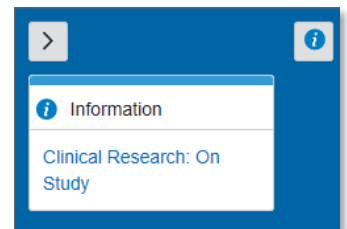
- Window closes and view is returned to **Enrolled** tab in the details display pane of the protocol.

STEP 9: The patient is now enrolled in the study.

SmartZone Alert

➤ A SmartZone alert will appear in the patient's chart when staff enter the chart. In order for the alert to fire and appear, the following events need to occur:

- Once the protocol has been built and the patient is enrolled into the study.
- After the patient has been enrolled into a study, the SmartZone alert will trigger upon opening the chart.



NOTE: When a patient is off treatment the Smart Zone alert will still appear until they are taken off study.