How to Complete Patient Events in CREDIT

These instructions show users how to check off patient events in the Patient File Cabinet in CREDIT. These instructions are only necessary if financial information needs to be captured per patient on a study.

Step 1: From the <u>CREDIT homepage</u>, select Patient File Cabinet.

			0		0	?	0	My Accour	
Patients	Prestudy	Protocols	Print	Mail	Reports	Help	Main Menu		Log Out
					IKEL	וו			
		СНБ	RISTUS Instit	ute for Inno	vation and Ad	vanced Clir	nical Care		
			,	Version 201	7: Welcome, De	emo!			
		_		vie	w wy Events				
		V ARCHIV	ED PATIEN	ITS	🔳 🕐 F	ORMS/LE	TTERS		
	(🤌 gener	ATE REPOR	RTS	🕕 I	IOSPITAL	CALENDAR		
			T FILE CAB	INET	🚺 F	PRESTUD	Y PATIENTS		
			COLS						

Step 2: Select the institution that the patient was screened at. You can technically select any institution since you are searching for a patient and not registering a new patient, but it is good practice to do the former.

Please select the Institution	$\overline{}$
Aspire IRB	^
Baylor College of Medicine IRB	
Chesapeake IRB	
CHRISTUS Health IRB	
CHRISTUS System Office	
IntegReview IRB	
LA-CHRISTUS Highland Medical Center	
LA-CHRISTUS SI, Flattick Hospital	
National Cancer Institute Central IRB	
NETX-CHRISTUS Mother Frances Hospital - Tyler	
NETX-CHRISTUS St. Michael Health System	
NETX-CHRISTUS Trinity Clinic	
New England IRB	
NM-CHRISTUS St. Vincent Regional Medical Center	
Oussier IRB	
Schulman IPR	
SETX-CHRISTUS Hospital - St. Elizabeth	
Sterling IRB	
STX-SPN-CHRISTUS Spohn Hospital Alice	
STX-SPN-CHRISTUS Spohn Hospital Reeville	

Step 3: In the bottom right search for the patient. In this example the patient's name is 'Demo Delete'.

demo	Patient Name	Search
Begins with	Archive Location	Options
Ends with Ocontains	Alias Patient Name	Re-Search

Step 4: Click on the patient name to open their demographic page.

			0			
Patients	Prestudy	Protocols	Print	Mail	Reports	
earching F	atient Name	with the follow	ing keyword			
	/					
1) demo						
1) demo ound 1 Reco	rd					
1) demo Jound 1 Reco Patient Name	rd Objective Stati	us Patient Protoco	ol ID Medical	Record Numb	er Coordinator	

Step 5: In the bottom right, click on the arm the event is a part of and then click **Edit Selected Protocol/Schedule**.

Patient Demo Study:PATIENT SUM-(System Office) Add New Protocol for Pa Protocols Edit Selected Protocol/Sci	
Protocols Edit Selected Protocol/Sci	atient
	chedule
and Delete Selected Patient Pr	rotocol

Step 6: Again in the bottom right of the screen, click Show Patient Checkoff Month/Year or Show Patient Checkoff All Events, depending on your needs at the time. The former will show patient events for the month/year selected in the drop down above it. The latter will show all patient events

Castavaft	Iculate Reset		
Patient Info Calendar 1 Col.	June 🗸 2017 🗸		
Patient Info Calendar 4 Col.	Show Patient Calendar		
ſ	Show Patient Checkoff Month\Year		
L	Show Patient Checkoff All Events		

Step 7: Now you can check off events by filling in the completion date, checking the box, and clicking Save Changes.

			0		0	?	0	My Account	O <u>CRED</u> II
Patients	Prestudy	Protocols	Print	Mail	Reports	Help	Main Menu		Log Out
Patient: Delete, Demo Protocol Build Version: 20170612142108 View My Even View My Even View My Even View My Even View My Even									View My Events
Show events	filter								
Show Ig	nored Events	Sho	w Completed Events		Show ONLY Com	pleted Event	s Show O	NLY Ignored Event	s
Save Ch	anges								
Event	I	Due Date	Completion Date		Complete all none	Ignore all none	Notes		
Pain assessme	ent 0	6/12/2017	06/12/2017		Rsrch				
Save Ch	anges								

Step 8: You can now choose to email staff if you wish by adding their names to the list. You can also edit the email below if necessary. At the bottom of the page, complete the event checkoff by clicking **Continue**.

Note: The events will not be officially checked off/completed until you click **Continue**, so you can return to the event checkoff page if necessary for any changes.

					?	0	My Account	O CRED	
Patients	Prestudy	Protocols	Print Mai	Reports	Help	Main Menu		Log Out	
			Retur	n to Check-off P	age				
			Send Messa	ge O Do NOT S	end Message				
				Captinua					
-				Conunue					
				Notify Staff	Notifications v	vill be sent			
		Select staf	ff and groups from this li	st:	to these staff a	nd groups:			
		All Staff	Andrew	Add >>					
	_ <u>_</u>	Babin, La Bartell, F	aura	<< Remove					
		Beebe, D Brunet, N	Deirdre Aike						
-		Burke, St	tephen W						
			Send via: Extern	al Email 🔿 Inter	nal CREDIT Mai	1			
	Message	Subject: Billing C	Compliance: [Demo Study:F	PATIENT SUM] Pat	ient events have be	een modified			
{{VALUE xx}} in the message body denotes a value is masked here and will be replaced with the actual value when the message is sent.									
- format - N	/ - font -	V — size — V I	IUSAN ×.	x, E = = =	E Decimal number	ers 🗸 🗄 🛊 🛊		ッ で図る	
4 8 9		ある予問	. A ¥ 💷 🖂 20 20 3						
Patient: Dele Patient/Proto	ete, Demo ocol ID: 00000	001						^	
Patient Initia	1s: DD								
On Study Da	te: 06/12/2017								
Medical Rec	ord No: 11111	111							
Protocol: Des	mo Study:PAT	IENT SUM ,							
Cost Center:	{{VALUE_1}	}							
Local IRB #: Principal Inv	Demo Study estigator:								
Staff Making	Changes: Use	Damo							
	Changes. Use	Exist	ing		Saved		Bill	ing	
Event ID	Complete	Complete Ig	nored Billing	Complete C	omplete Date	ed Billing	Billing	Notes	
Path:									
			Ì	Continue					

For technical questions related to CREDIT please call: 469.282.2014 Email: <u>CIIACC@christushealth.org</u>