How to Complete Multiple Patient Events in CREDIT

These instructions show users how to check off multiple patient events at once in the Reports section in CREDIT. CREDIT will only report data that you already have access to.

Step 1:   From the CREDIT homepage, select **Generate Reports**.

Step 2:   Select the report title **Master Schedule**. You can click the heart icon to save this as a favorite report for later, which will place it at the top of the list.
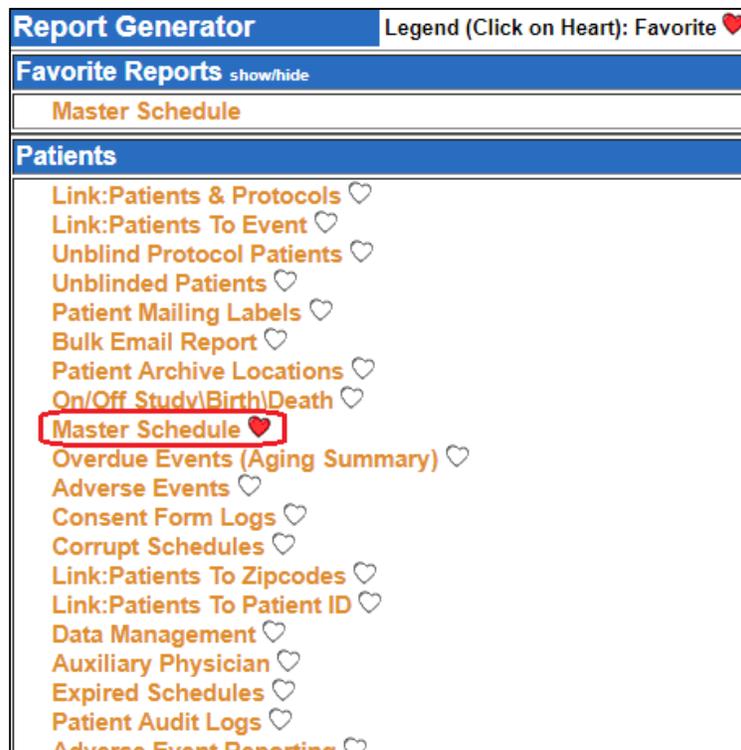
Step 3: On the right side of the screen there are a number of options. Make sure the **Check-Off Boxes** option is selected. The other options can be changed to alter what columns the report actually outputs.

☐ Patient Status
☑ Financial Invoicables (Separate Column)
☐ Financial Payables (Separate Column)
☐ Financial Cost Center
☐ Protocol Event Notes (With Event)
☐ Protocol Event Notes (Column)
☑ Check-Off Boxes
☑ Event Notes
☑ Billing Compliance
☐ Billing Compliance Notes
☐ Patient Calendar Notes (Only for patients with events in this date range)

Step 4: Make sure the View in Browser option is selected. This will let you input data on the screen dynamically, although the other options can of course be used to report the data to excel/word.

Merge File: ☐ Export to File
Name [   ]

File Option**: ⊙ View in the Browser
○ Export to Excel (Older than Office 2010)
○ Export to Excel (Office 2010 and up)
○ Export to Word

**Due to recent security updates to Microsoft Excel, exporting to Excel may not work for you. If you experience issues opening the export file, please contact DDOTS support.

Step 5: On the left side of the screen, select the options that determine the boundaries of what the report will pull. These will need to be customized to your specific needs, but these screen shots below can be used as an example. Mainly, make sure the site, protocol, and date range are correctly selected.

Institution:
- Aspire IRB
- Baylor College of Medicine IRB
- BRANY IRB
- Chesapeake IRB
- CHRISTUS Health IRB
- CHRISTUS System Office
- IntegReview IRB
- LA-Advanced Cardiovascular Specialists
- LA-CHRISTUS Highland Medical Center
- LA-CHRISTUS St. Frances Cabrini Hospital
- LA-CHRISTUS St. Patrick Hospital
- National Cancer Institute Central IRB

All | None

Department:
- --All Departments--
- Anesthesia
- BioBank
- Cardiovascular
- Colorectal
- Dentistry
- Dermatology
- Endocrinology

All

Select Range Month ▼ ▼
Through Today | Clear
Last Year | This Year | Next Year
Last Quarter | This Quarter | Next Quarter
Last Month | This Month | Next Month | Next 3 Months

Starting: 01/01/1900 Today

Ending: 07/10/2018 Today

Protocol:
- ---All Protocols---
- 002 Rosenkranz, Laura
- 0218
- 10-392 ABSORB III
- 10-CBA
- 1029.02
- 2002-100
- 2011-018

Exclude:
- ☐ Arms "X"
- ☐ Arms "Y"
- ☐ Arms "Z"
- ☐ Screening Arms
- ☐ Prestudy Arms

Sponsor: All Sponsors ▼

Sponsor Affiliations:
- ---All Affiliates---
- Commercial Sponsor
- Internal Study
- National Cancer Institute
- National Cancer Institute of Canada
- National Institute of Health
- Not Applicable

Events:
- ⦿ Checked (Completed & Ignored) and Unchecked Events
- ○ Only "Completed" and Unchecked Events
- ○ Unchecked-Off Events Only
- ○ Checked-Off "Complete" Events Only
- ○ Checked-Off "Ignore" Events Only
- ○ All Checked-Off Events Only
- ○ When Events Are Checked Off "Completed" (Ignored Events are Excluded)

Comment Consideration:
- ○ Exclude Events with Comments
- ⦿ Include Events with Comments
- ○ Include ONLY Events with Comments

Protocol Note:

[   ] Filter Word

- ○ Computer Generated
- ○ Manual Events
- ⦿ Both

- ○ Exclude Past Due Events
- ⦿ Include Past Due Events

- ☐ Only Patients Off Treatment (Follow-up)

Billing Compliance:
```
All
Cancel Billing
N/A
Research
Standard of Care
Unknown
```

Activity: ☑ Treatment Events
- ○ Provided Agents Only
- ○ Not Provided Agents Only
- ⦿ Both
- ○ Treatment Agents Only
- ○ Control Agents Only
- ⦿ Both

Filter Word: [   ]
Filter Word: [   ]
Filter Word: [   ]
Filter Word: [   ]

☐ Diagnostic Events
- ☐ Show Child Labs

Filter Word: [   ]
Filter Word: [   ]
Filter Word: [   ]
Filter Word: [   ]

☐ Activity Events

Filter Word: [   ]
Filter Word: [   ]
Filter Word: [   ]
Filter Word: [   ]

☑ Financial Events
- ☐ Exclude Invoiced Milestones
- ☐ Exclude Milestones with Requests for Payment
- ☐ Exclude Milestones with no Invoiceable Values
- ☐ Exclude Dollar Values on Report Display
- ○ Invoiceable Only
- ○ Payable Only
- ⦿ Both

Filter Word: [   ]
Filter Word: [   ]
Filter Word: [   ]
Filter Word: [   ]

☑ Calendar Notations

July 2018

Staff: ⦿ All Staff

○ By Coordinator

Babin, Laura ▲
Bartell, Ellen
Beebe, Deirdre
Cadena-Malek, Yezenia ▼

○ By Data Manager

Richard, Leo ▲
▼

○ By Enrolling Physician/Investigator

Adamson MD, Aaron ▲
Ahmad MD, Kaashif
Ahmed MD, Hinan
Anderson, Ashley ▼

Patient Status: ⦿ All Status

○ By Status

Active ▲
Complete
Consented
Deceased
Lost to Follow-Up
Nonviable Sample
Screen Failure
Withdrawn ▼

Patient Race: ⦿ All Races

○ By Ethnic

American Indian or Alaskan Native ▲
Asian
Black or African American
More Than One Race
Native Hawaiian or Other Pacific Islander
Unknown or Not Reporting
White ▼

Ethnic Categories: ⦿ All Categories

○ By Ethnic Category

Hispanic or Latino ▲
Not Hispanic or Latino
Not Reporting (Patient refused\data not available)
Unknown (Individuals not reporting ethnicity)
Unknown (Patient is unsure of their ethnicity) ▼

Create Report

Step 6:   Click **Create Report** at the bottom of the page to run the report once all the desired options are selected.

For any questions please contact the OSPRF team
Email: OSP@christushealth.org

For technical questions please call: 469.282.2014
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