

The Research Organizer worklist 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:

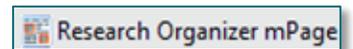
- View a summary of roles, milestones, and other amendments added to a protocol.
- Ability to enroll patients on a selected protocol.
- A list of all patients who are or have been enrolled on a selected protocol.
- Columns display different information about the protocol in one view.



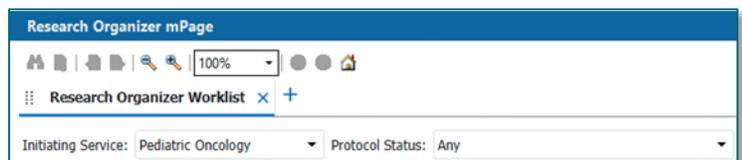
| Protocol Mnemonic | Date Activated | Status | Protocol Alias | Principal Investigator | Primary Sponsor | Protocol Contacts |
|-----------------------------|----------------|-----------------|----------------|------------------------|-----------------|----------------------|
| Testing - New Protocol #407 | 04/22/2025 | Open to Accrual | | SINCLAIR DO, SARAH J | | SINCLAIR DO, SARAH J |

Taking a Patient Off Study

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



STEP 2: Select the applicable **Initiating Service** from the list and locate the protocol to take the patient off study.

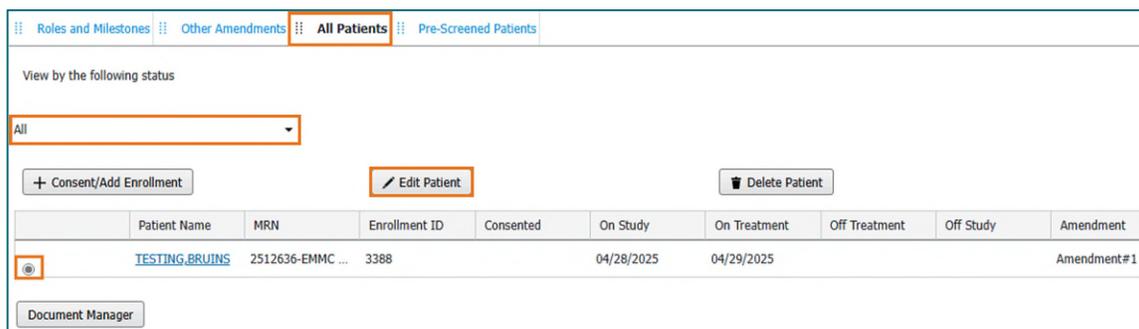


STEP 3: Use the **Protocol Status** field to filter protocols by status.

STEP 4: Click in the cell with the name of the protocol. The display pane opens which includes several tabs with more protocol details.

STEP 5: Click the **All Patients** tab.

- Select a status to view from the dropdown list.
- Patients display based on the status chosen.



| | Patient Name | MRN | Enrollment ID | Consented | On Study | On Treatment | Off Treatment | Off Study | Amendment |
|--|----------------|------------------|---------------|-----------|------------|--------------|---------------|-----------|-------------|
| | TESTING_BRUINS | 2512636-EMMC ... | 3388 | | 04/28/2025 | 04/29/2025 | | | Amendment#1 |

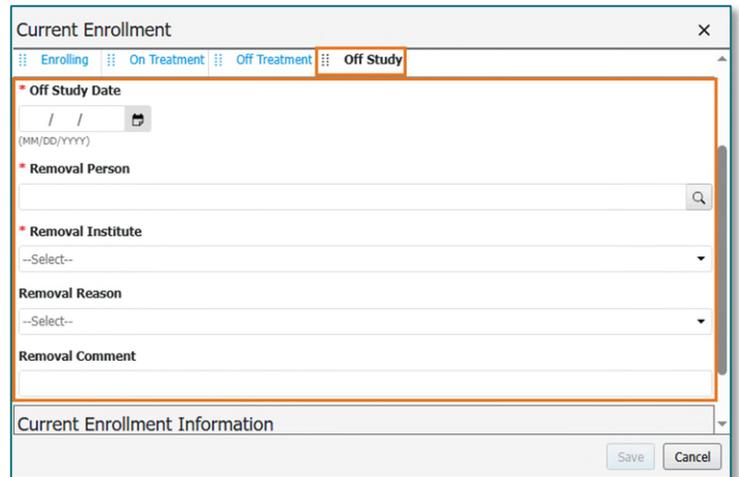
STEP 6: Select the radial circle next to the patient and click **Edit Patient**.

STEP 7: Select the **Off-Study** tab.

NOTE: If the **Study Type of Therapeutic** was selected when creating the protocol, there will be four tabs available: **Enrolling, On Treatment, Off Treatment, and Off Study**.

- Enter the date the patient the patient was taken off study in the **Off-Study Date** box.
- Enter the **Removal Person, Removal Institute, and Removal Reason** information.
- Enter a free-text explanation for why the patient was removed from the study in **Removal Comment** box.

NOTE: A free text comment must be entered if **Other** is selected from the **Removal Reason** list.

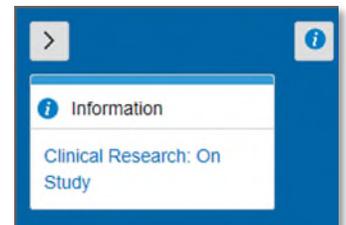


STEP 8: Select **Save**. The patient's details are updated.

SmartZone Alert

➤ A SmartZone alert will appear in the patient's chart when staff enter the chart. 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.