

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:

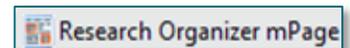
- View a summary of roles, milestones, and other amendments added to a protocol.
- Ability to enroll patients on a selected protocol.
- A list of all patients who are or have been enrolled on a selected protocol.
- Columns display different information about the protocol in one view.



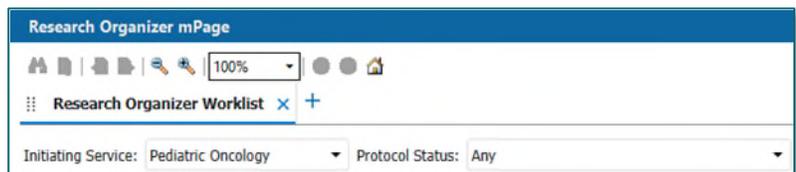
Protocol Mnemonic	Date Activated	Status	Protocol Alias	Principal Investigator	Primary Sponsor	Protocol Contacts
Testing - New Protocol #407	04/22/2025	Open to Accrual		SINCLAIR DO, SARAH J		SINCLAIR DO, SARAH J

## Enrolling Patients into a 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 enroll patient(s) in.



**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.

- **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.



Testing - New Protocol #407					
DOB: --		Amendment: Amendment# 1 Date Activated: 04/22/2025 Status: Open to Accrual Principal Investigator: SINCLAIR DO, SARAH J			
<a href="#">Roles and Milestones</a>   <a href="#">Other Amendments</a>   <a href="#">All Patients</a>   <a href="#">Pre-Screened Patients</a>					
<b>Roles</b>					
Pro.Contact	Name	Role	Position	Organization	Role Type
	SMITH - TEST01 , LANCE	Creator			Personal
✓	SINCLAIR DO, SARAH J	Coordinating Institution Principal Investigator		EMMC	Organizational Personal
<b>Milestones</b>					
Seq No.	Activity	Responsible Party	Date Completed	View	
1	Activated		04/22/2025	>	
2	Approved		04/23/2025	>	
3	Closed		==j=====	>	
Document Manager					

- **All Patients:** Displays a list of all patients who are enrolled in the protocol.
- **Pre-Screened Patients:** This functionality is currently not being used.

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

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

**STEP 6:** Click the **Consent/Add Enrollment** button.

**STEP 7:** Patient search window will open.

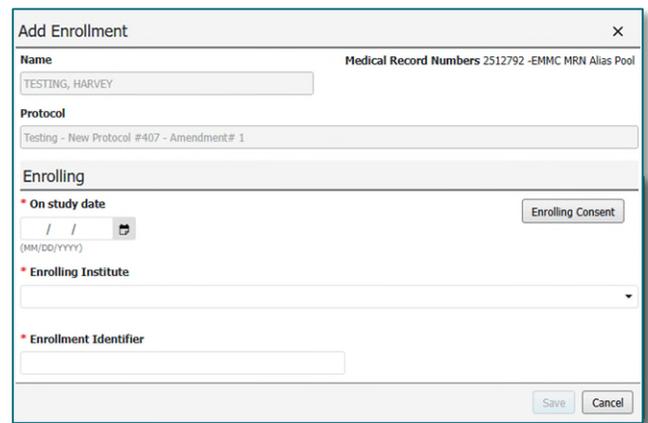
- Search for the patient to enroll on the study.

**STEP 8:** Select the patient's name and click **OK**.

- The **Add Enrollment** window appears.

**STEP 9:** When prompted, enter the enrollment information.

- Enter the applicable **On Study Date**.
- **Enrolling Institution:** Select the organization from the dropdown list that was chosen when the protocol was created.
- **Enrollment Identifier:** Enter the enrollment identifier assigned to the patient in the study.

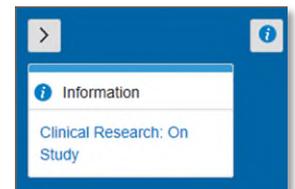


**STEP 10:** Click **Save** to close the **Add Enrollment** dialog box.

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