From the Office of Health Informatics

PowerTrials – Research Organizer MPage Enrolling Patients into a Protocol

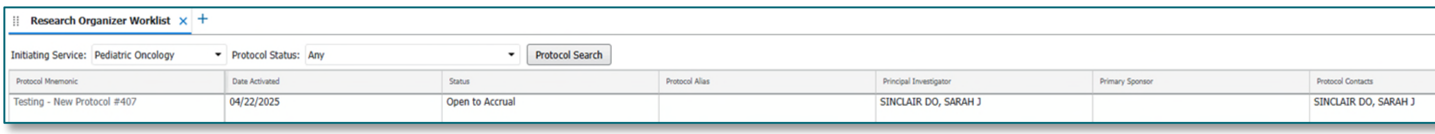
June 30, 2025

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

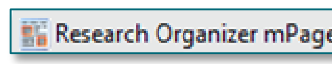
The **Research Organizer Worklist** provides the following capabilities:

- 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.



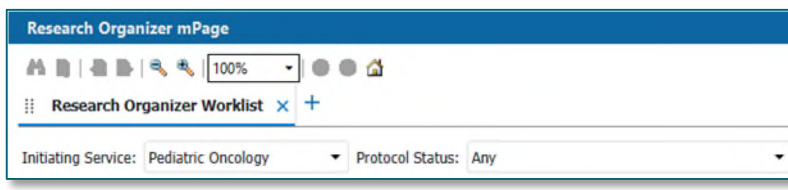
Enrolling Patients into a Study

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



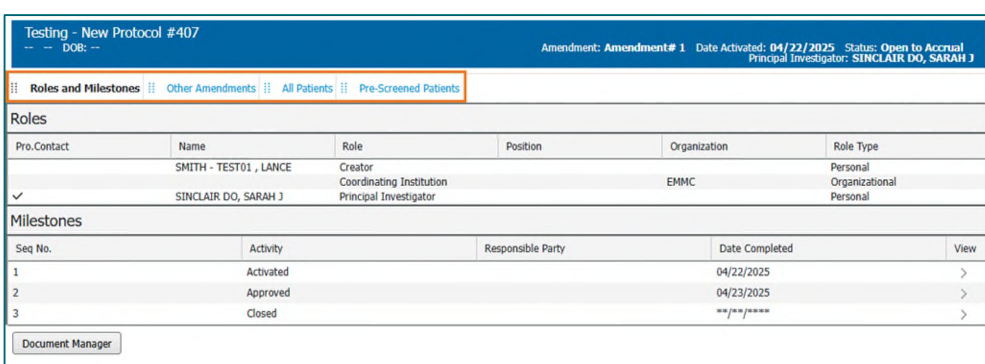
STEP 2: Select the applicable **Initiating Service** from the list and locate the protocol to enroll patient(s) in.

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.



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

<u>STEP 5</u>: Click the **All Patients** tab.

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

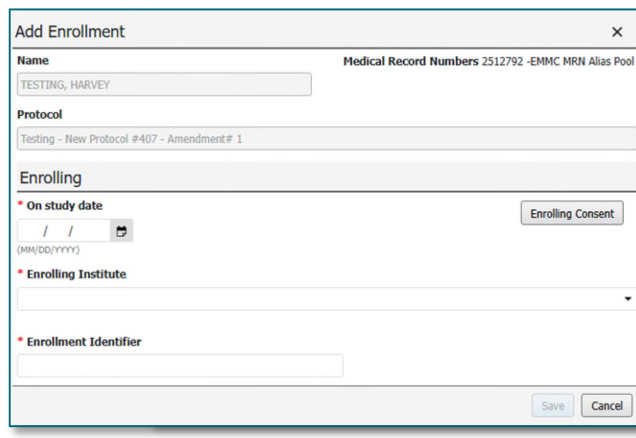
<u>STEP 6</u>: Click the **Consent/Add Enrollment** button.

<u>STEP 7</u>: Patient search window will open.

- Search for the patient to enroll on the study.

<u>STEP 8</u>: Select the patient's name and click **OK**.

- The **Add Enrollment** window appears.



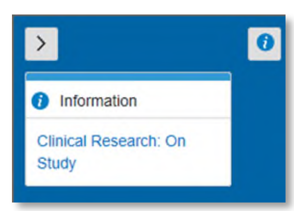
<u>STEP 9</u>: When prompted, enter the enrollment information.

- 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.

<u>STEP 10</u>: 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.

<u>SmartZone Alert</u>



➢ 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 patent is enrolled into the study.
- After the patient has been enrolled into a study, the SmartZone alert will trigger upon opening the chart.

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