



# **Referred Patient Alerts & Recruitment Manager™ Instructions**



## Referred Patient Alerts & Online Recruitment Manager™ Instructions

The following training documentation will explain how you will obtain Referred Patient Alerts (RPAs), update a patient's enrollment progress in Acurian's Recruitment Manager for Sites™ application and receive Update Alert reminders to help keep your patient enrollment data current.

Section	Content	Page
A. Referred Patient Alerts (RPAs)	A Referred Patient Alert contains specific patient information you will need to contact the patient, schedule office visits and determine their qualifications to be enrolled into the trial.	2
B. Recruitment Manager™	Acurian's proprietary application, Recruitment Manager™, will be used to update a patient through to randomization.	4
C. Update Alerts	Update Alerts are emails that can be used to ensure that a patient's enrollment progress is kept current.	9

### A. Referred Patient Alerts (RPAs)

#### 1. Receiving Acurian Referred Patient Alerts (RPAs) via email

The screen shot to the right is an example of an email you will receive containing a link to a Referred Patient Alert.


Click the link "View Patients", to view the Referred Patient Alert pdf file on your screen.

**Action Required**  
**0004-MDD (1234) - Referred Patient Alert**  
**Protocol: WP157-201**

Dear Karen,

You have new patients awaiting your review.

Each patient has been pre-qualified. Please click the button below to review your patient profiles. We would appreciate you reaching out to patients as soon as possible to ensure patient's interest level remains high.


[VIEW PATIENTS ▶](#)

If you have any questions or concerns about this study or any of the RPAs, please contact Laura Vesey at 866-335-3115 | [laura.vesey@acurian.com](mailto:laura.vesey@acurian.com)

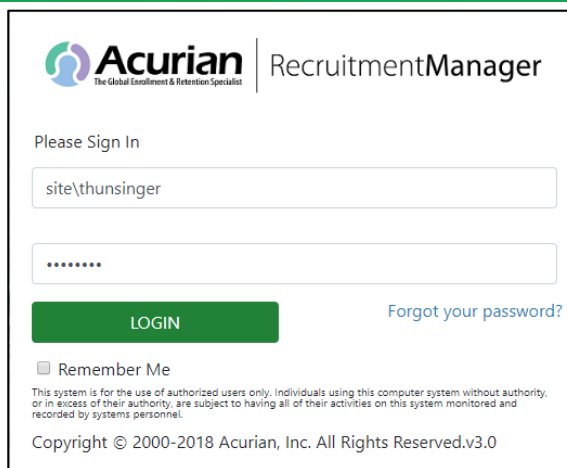
Thank you,  
Acurian



## Referred Patient Alerts & Online Recruitment Manager™ Instructions

You will be required to log in to Recruitment Manager™ (see screen shot at right).

1. Type the Domain\Username  
Domain = site
2. Type the password and click LOGIN to view the Referred Patient Alert.



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 The Global Enrollment & Retention Specialist

Please Sign In

site\thunsinger

\*\*\*\*\*

**LOGIN** [Forgot your password?](#)

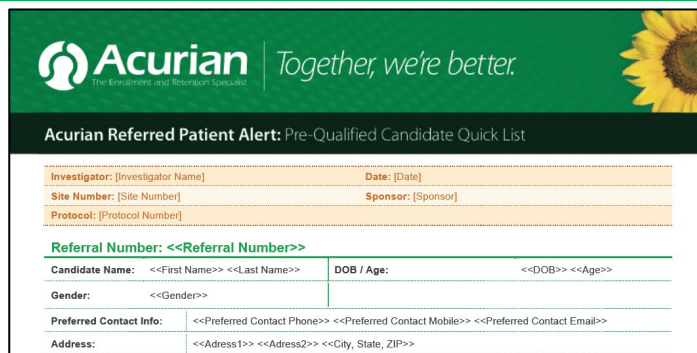
☐ Remember Me

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### “Referred Patient Alert”

This document contains patient contact information along with study specific inclusion/exclusion criteria.



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**Acurian Referred Patient Alert: Pre-Qualified Candidate Quick List**

Investigator: [Investigator Name]	Date: [Date]
Site Number: [Site Number]	Sponsor: [Sponsor]
Protocol: [Protocol Number]	

**Referral Number: <<Referral Number>>**

<b>Candidate Name:</b> <<First Name>> <<Last Name>>	<b>DOB / Age:</b> <<DOB>> <<Age>>
<b>Gender:</b> <<Gender>>	
<b>Preferred Contact Info:</b> <<Preferred Contact Phone>> <<Preferred Contact Mobile>> <<Preferred Contact Email>>	
<b>Address:</b> <<Address1>> <<Address2>> <<City, State, ZIP>>	



## Referred Patient Alerts & Online Recruitment Manager™ Instructions

### B. Recruitment Manager for Sites™

#### 1. Overview

Recruitment Manager for Sites™ is a web-based application that provides sites the ability to provide study sponsors with real time updates on the recruitment status of all referred patients. Sites may use the application to update patients for all projects on which Acurian is providing central recruitment services to the study sponsor.

##### WHY ARE TIMELY UPDATES NECESSARY?

Study sponsors and Acurian rely on your updates to determine additional recruitment needs and provide services to help improve your recruitment efforts. Please contact your Acurian Site Services Team with any questions or problems. Contact information for your Acurian Site Services Team is located at the top of each page on Recruitment Manager for Sites™.

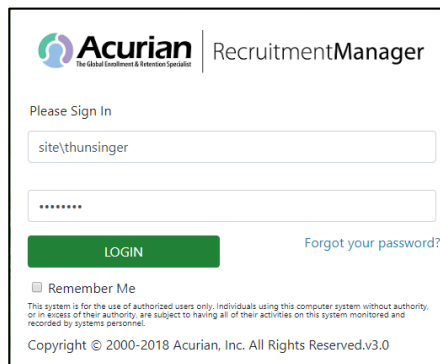
We understand that evaluating and treating patients is your top priority. The Recruitment Manager™ application makes the process of accessing and updating information simple.

- **Login Screen:** includes email and password entry boxes for user login
- **Study Index:** lists all relevant studies so the site may select the study for which updates are required
- **Patient Roster:** lists Acurian referred patients so the site may select the patient(s) that require updates
- **Patient Status:** includes question/answer format to determine the current status for each patient
- **Patient Disqualification Reasons:** listing of study specific reasons for any patient who does not qualify
- **Recruitment Manager Update Alerts:** email notifications that indicate the referrals that need immediate attention

#### 2. Login Screen

##### How to access Recruitment Manager™:

1. Type **https://sites.acurian.com** in your Internet Browser.
2. Type the Domain\Username  
Domain = site
3. Type the password and click LOGIN to access the Study Index screen.



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 The Global Enrollment & Retention Specialist

Please Sign In

site\thunsinger

\*\*\*\*\*

**LOGIN** [Forgot your password?](#)

☐ Remember Me

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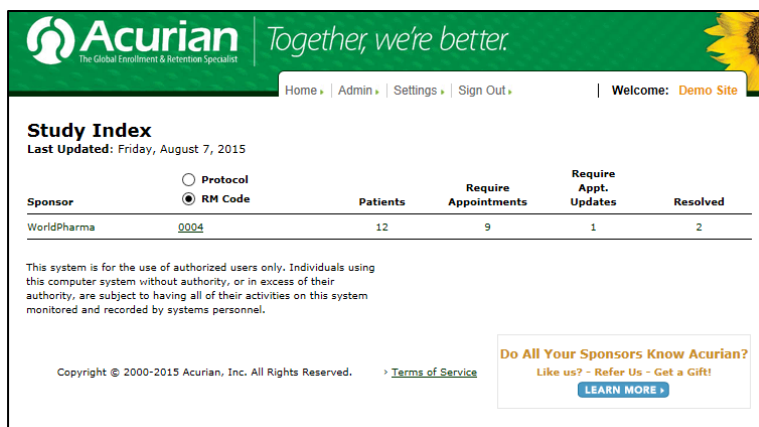
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#### 3. Study Index

##### Choosing a Protocol

The Study Index screen includes a list of all protocols that you were given access to manage in Recruitment Manager for Sites™. NOTE: If you need access to a different protocol, contact your Acurian representative.

1. Select a protocol number to access your Patient Roster.



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Home | Admin | Settings | Sign Out | Welcome: Demo Site

**Study Index**  
 Last Updated: Friday, August 7, 2015

☐ Protocol  
☒ RM Code

Sponsor	Protocol	Patients	Require Appointments	Require Appt. Updates	Resolved
WorldPharma	0004	12	9	1	2

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## Referred Patient Alerts & Online Recruitment Manager™ Instructions

### 4. Patient Roster

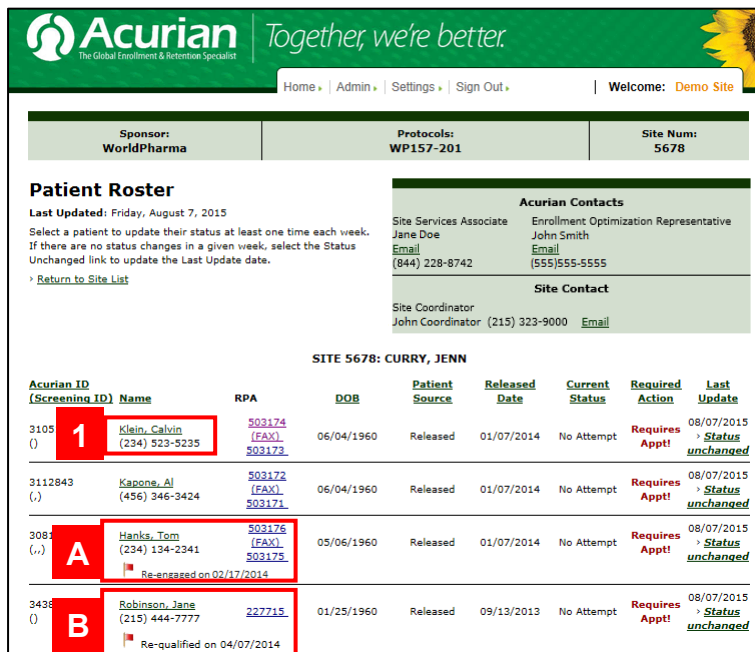
#### Reviewing Patient Referrals

The Patient Roster will display all patients referred from Acurian (listed with a Patient Source of "Released").

Patients that are referred through Acurian's centralized screening for a program will immediately appear on the Patient Roster in the real time.

Review the **Required Action** column to determine if the patient requires an appointment or an update.

- To update the status for any patient - select a patient's name or initials to access the Patient Status screen where the status for each patient may be updated. (See section **"5 PATIENT STATUS"** within this document for further instructions)



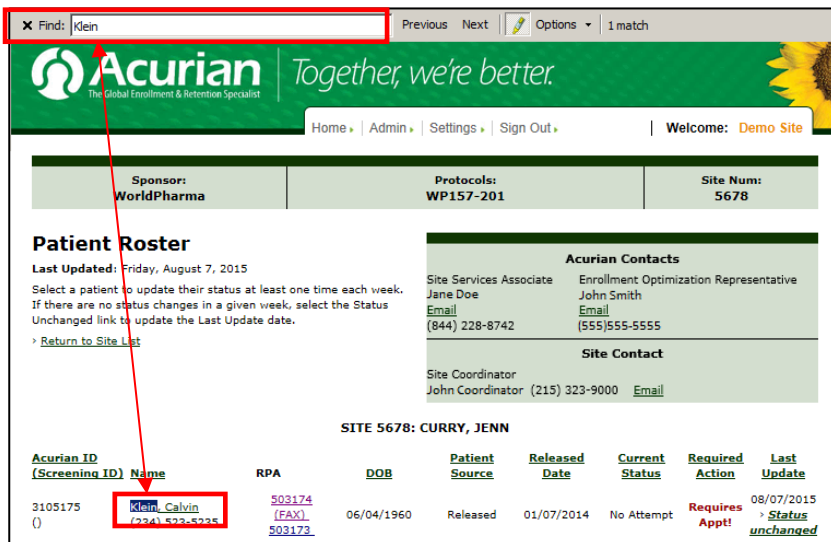
- Re-Engaged** Referrals – A Re-Engaged Referral is a patient that was initially resolved by your site as 'No Longer Interested', 'Unable to Contact', or 'No Show/Cancel'. We have successfully re-contacted this patient and they confirmed they are still interested in participating in the study. The status of these patients will reflect as "Contacted" on your roster. We are asking that you attempt to re-contact these referrals and process them as if they are a new lead.
- Re-Qualified** Referrals – A Re-Qualified Referral is a patient that had previously disqualified for the study, but now qualifies. The status of these patients will reflect as "Contacted" on your roster. We are asking that you attempt to re-contact these referrals and process them as if they are a new lead.

#### Helpful Hint:

- Clicking Control <Ctrl> and "F" allows you to type in a *patients name* (first or last) in order to search/find them on that specific screen as shown in the picture.

Note: Clicking on the sortable column headers can help you locate patients fast:

- Patient Name column can be sorted alphabetically A-Z or Z-A by clicking the column header "Name".
  - Click once to sort A-Z
  - Click again to sort Z-A
- Other columns can also be sorted to help you locate patients.
- This page, by default, sorts by "Current Status", ensuring that all patients requiring action will appear at the top of the list.





## Referred Patient Alerts & Online Recruitment Manager™ Instructions

### 5. Patient Status

#### Updating Patient Status

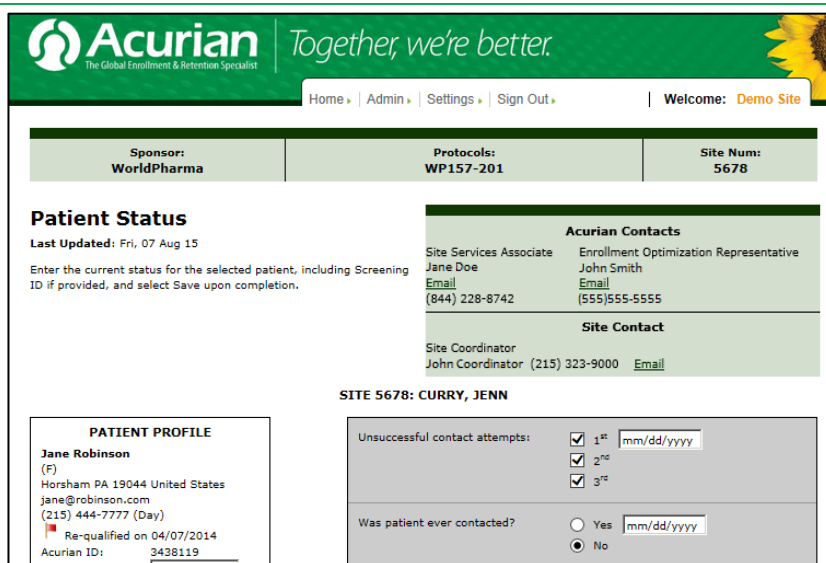
The Patient Status screen will display a set of questions to assist in the process of updating the status of each patient.

1. To update the status, answer the questions from top to bottom on the right side. The gray highlighted section displays the current outstanding question.
2. Errors: if any inconsistent data is entered or required information is missing, a red error message will appear above the Patient Profile to describe the required changes.

The first section for updating is unsuccessful contact attempts. We ask that you try to make 3 attempts via phone and/or email to contact the patient.

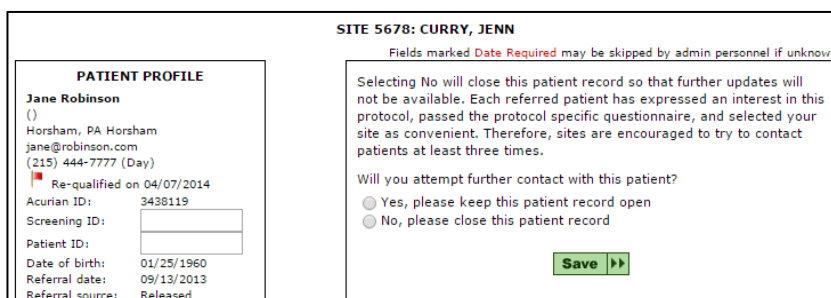
If you are unable to contact the patient click No to the question, Was patient ever contacted.

Then click the save button at the bottom of the screen.



You will then see a screen where you will have the option of closing the patient's record or leaving it open.

If a patient is NOT closed, it is assumed you are still attempting to contact this patient. Please close the patient record if you are no longer attempting to contact the patient.



NOTE: If a patient contacts you after you have closed the patient record, please contact your site services associate to request the patient record be reopened.



## Referred Patient Alerts & Online Recruitment Manager™ Instructions

You would then answer the questions:

- Was patient scheduled for an office evaluation?
- Did patient attend the scheduled appointment?
  - If No, will patient be rescheduled?

NOTE: Follow these steps if you want to change an existing appointment date. For example, the date for the office evaluation is scheduled for 3/14/2012. On 3/10/2012 you realize you need to reschedule the patient.

- Select "No, patient did not show" next to the question "Did patient attend the scheduled appointment?"
- Select "Yes" and enter new appointment date next to the question "If no, will patient be rescheduled?"
- The new appointment date will appear at the question "Was patient scheduled for an office evaluation?"

Sponsor: WorldPharma	Protocols: WP157-201	Site Num: 1234
<b>Patient Status</b> Last Updated: Tuesday, March 20, 2012 Enter the current status for the selected patient, including Screening ID if provided, and select Save upon completion.		
<b>Acurian Contacts</b> Site Services Associate: Jane Doe Email: (844) 228-8742 Enrollment Optimization Representative: John Smith Email: (555) 555-5555 <b>Site Contact</b> Site Coordinator: John Coordinator (215) 323-9000 Email		
<b>SITE 1234: BOUCHER, JENNIFER</b> Fields marked <b>Date Required</b> may be skipped by admin personnel if unknown		
<b>PATIENT PROFILE</b> Name: [Name] Address: [Address] United States Email: [Email] Acurian ID: [ID] Screening ID: [ID] Patient ID: [ID] Date of birth: 05/06/1960 Referral date: 07/19/2011 Referral source: Released Released date: 07/19/2011 Qualifies for: WP157-201		
Unsuccessful contact attempts: <input type="checkbox"/> 1 <sup>st</sup> <input type="checkbox"/> 2 <sup>nd</sup> <input type="checkbox"/> 3 <sup>rd</sup>		
Was patient ever contacted? <input checked="" type="radio"/> Yes <input type="radio"/> No <span>03/06/2012</span>		
Was patient scheduled for an office evaluation? <input checked="" type="radio"/> Yes <input type="radio"/> No <span>03/14/2012</span> <b>Date Required</b> <input type="checkbox"/> Send ECP Video <b>Sent</b> <input type="radio"/> No, patient does not qualify <input type="radio"/> No, patient was not interested		
Did patient attend the scheduled appointment? <input type="radio"/> Yes <input checked="" type="radio"/> No, patient did not show <input type="radio"/> No, patient cancelled		
If No, will patient be rescheduled? <input type="radio"/> Yes <input type="radio"/> No <span>mm/dd/yyyy</span> <input type="radio"/> Yes, date to be determined		

Assuming the patient attends the appointment, you will need to answer the questions you see in the screen shot to the right.

- Did patient sign a NON-study specific consent form? -
- Did patient sign a study specific consent form?
  - Enter the protocol (if applicable)
  - Enter the Screening ID
 IMPORTANT: Please don't forget this step.
- Did patient enroll?
- Did patient randomize?

Did patient sign a NON-study specific consent form?	<input type="radio"/> Yes <input type="radio"/> No, does not apply	<b>A</b>
Did patient sign a study specific consent form?	<input type="radio"/> Yes <input type="radio"/> No, patient does not qualify <input type="radio"/> No, patient will not sign	<b>B</b>
If Yes, select protocol: WP157-201		
Screening ID: [ID]		
Did patient enroll?	<input type="radio"/> Yes <input type="radio"/> No, patient does not qualify <input type="radio"/> No, patient is no longer interested	<b>C</b>
Did patient randomize?	<input type="radio"/> Yes <input type="radio"/> No, patient does not qualify <input type="radio"/> No, patient is no longer interested	<b>D</b>
<input type="button" value="Save"/> <input type="button" value="Save + Comment"/> <input type="button" value="X Cancel"/>		



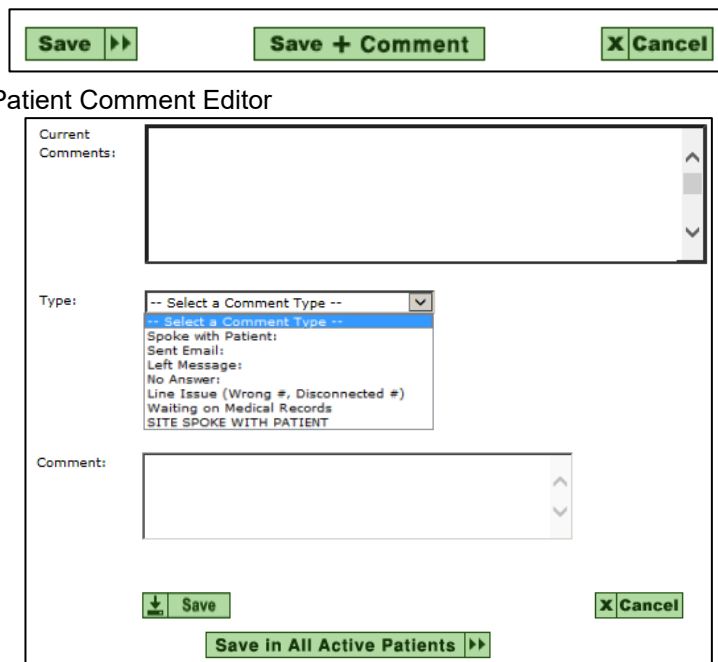
## Referred Patient Alerts & Online Recruitment Manager™ Instructions

### 6. Save and Comment

At the bottom of the Patient Status screen you will see the options to “Save” and “Save + Comment”.

Selecting the “Save + Comment” button will bring you to the Patient Comment Editor page, where you can enter any comments that you would like on a specific patient record. Click on a selected comment type and enter comments in the comment box. When you return to the patient’s record you will be able to view the comments entered at the bottom of the page on the patient status page.

Note: This feature is important as it allows you to view previous details that were entered on a patient’s record.



The Patient Comment Editor interface includes a top bar with three buttons: "Save" (with a right arrow), "Save + Comment", and "X Cancel". Below this is a section titled "Patient Comment Editor". It contains a "Current Comments:" text area with a vertical scrollbar. Underneath is a "Type:" dropdown menu with a list of options: "-- Select a Comment Type --", "-- Select a Comment Type --", "Spoke with Patient:", "Sent Email:", "Left Message:", "No Answer:", "Line Issue (Wrong #, Disconnected #)", "Waiting on Medical Records", and "SITE SPOKE WITH PATIENT". Below the dropdown is a "Comment:" text area with a vertical scrollbar. At the bottom, there are three buttons: a "Save" button with a download icon, an "X Cancel" button, and a "Save in All Active Patients" button with a right arrow.

### 7. Patient Disqualification

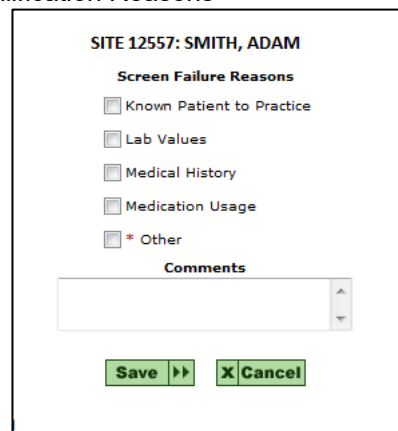
#### Updating Patient Disqualification Reasons:

The Patient Disqualification Reasons screen will display for any patient marked as “Patient does not qualify.”

Select the study specific reason(s) why the patient does not qualify, enter any applicable comments and select Save.

NOTE: This feedback is *extremely* important to Acurian. We use it to track trends, make pre-screener recommendations to the sponsor, and identify if there is anything we can improve in the pre-screening process to provide your site with better-qualified referrals. The more specific information you can provide to us about the reason a patient did not qualify, the better we’ll be able to serve your site going forward.

#### Patient Disqualification Reasons



The Patient Disqualification Reasons interface shows the patient name "SITE 12557: SMITH, ADAM". Below this is a section titled "Screen Failure Reasons" with five checkboxes: "Known Patient to Practice", "Lab Values", "Medical History", "Medication Usage", and "Other" (which is selected). Below the checkboxes is a "Comments" text area with a vertical scrollbar. At the bottom, there are two buttons: "Save" (with a right arrow) and "X Cancel".





## Referred Patient Alerts & Online Recruitment Manager™ Instructions

### C. Update Alerts

Acurian developed an email notification that will indicate the referrals that need immediate attention. This will allow you to quickly and easily update those individuals. You will be presented with the top 10 referrals that need updating. You will also have the opportunity to complete any other updates as well.


The application consists of only a few screens to simply identify the updates that are required.

#### The application works as follows:

1. Simply click the View Patient List button in the email.
2. Log into Acurian's Recruitment Manager application (See instructions above under section B2).

<Study Name - Protocol Number>

Dear <Coordinator Name>, We know you're busy, so we've pulled together your patient roster. There are some patients on the roster with whom we really need your help updating:



**⌚ Time for action!**

View Patient List Now

GO

If you have any questions or concerns about this study or any of the patients on the list, please contact:

<Contact> at <phone> | <Email>

Thank you,  
Acurian

3. Select the Update button to select the referral that you want to update and update the status accordingly.

Patients Needing Updates

<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="flex: 1;"> <p>➔ <b>Jane Doe</b></p> <p style="font-size: small; color: #800000;">Appointment Scheduled   Last Updated 10/05/2011</p> </div> <div style="flex: 0.1; text-align: center;"> <div style="background-color: #800000; color: white; padding: 5px 10px; border-radius: 3px;">UPDATE +</div> </div> </div>
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="flex: 1;"> <p>➔ <b>John Doe</b></p> <p style="font-size: small; color: #800000;">Appointment Scheduled   Last Updated 10/08/2011</p> </div> <div style="flex: 0.1; text-align: center;"> <div style="background-color: #800000; color: white; padding: 5px 10px; border-radius: 3px;">UPDATE +</div> </div> </div>
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="flex: 1;"> <p>➔ <b>Jon Public</b></p> <p style="font-size: small; color: #800000;">Consented   Last Updated 09/21/2011</p> </div> <div style="flex: 0.1; text-align: center;"> <div style="background-color: #800000; color: white; padding: 5px 10px; border-radius: 3px;">UPDATE +</div> </div> </div>

[Update More Patients ▶](#)