Referred Patient Alerts & 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.

### 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.
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.

“Referred Patient Alert”
This document contains patient contact information along with study specific inclusion/exclusion criteria.
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.

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.
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.

1. 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)

A. 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.

B. 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 <Crtl> and “F” allows you to type in a patient's 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.
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.
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You would then answer the questions:

- Was patient scheduled for an office evaluation?
- Did patient attend the scheduled appointment?
  o 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.

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

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

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

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.
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).

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