STH EDGE Quick Recruitment Guide

Logging in to EDGE

www.edge.nhs.uk

Please enter your username (by default: your email) and password as found in your email in to EDGE and click **LOGIN**. If you cannot locate your registration email from EDGE, please check your Junk email folder before contacting your local EDGE Administrator.

If you forget your password, click **FORGOTTEN YOUR PASSWORD** on the LOGIN screen and follow the on-screen prompts and security questions to reset it. Upon successful login, you will be directed to the EDGE Home Screen.

If this is the first time you have logged into EDGE, you will need to set your security questions.

For any assistance with logging in, contact your local EDGE administrator.

Local EDGE Administrator at STH:

Natasha Ottley - Natasha.ottley@sth.nhs.uk - 0114 226 5930

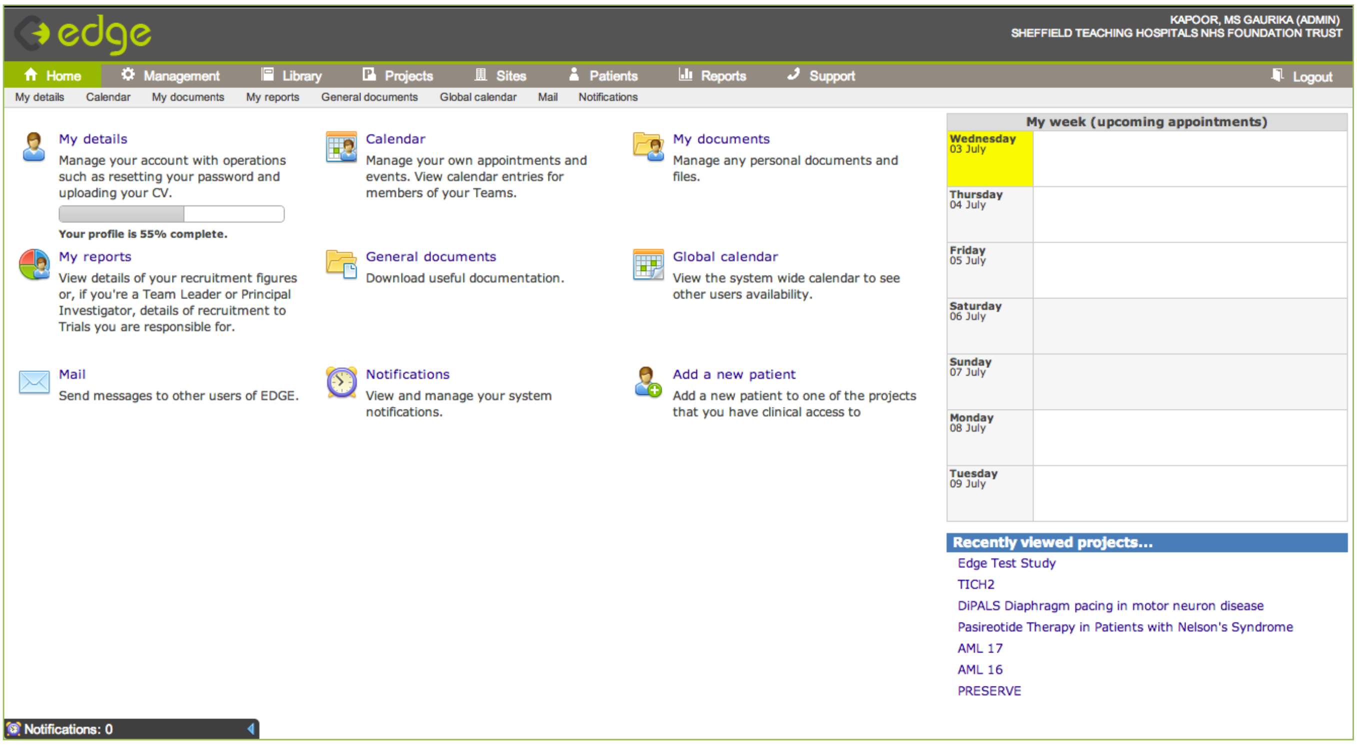
Zoe Whiteley - Zoe.whiteley@sth.nhs.uk - 0114 271 2572

Home Screen

HOME

The home screen has shortcuts to the most frequently used parts of the system. The grey task bar at the top contains all the functions of EDGE. Each tab on the grey task bar has sub-sections to help you navigate.

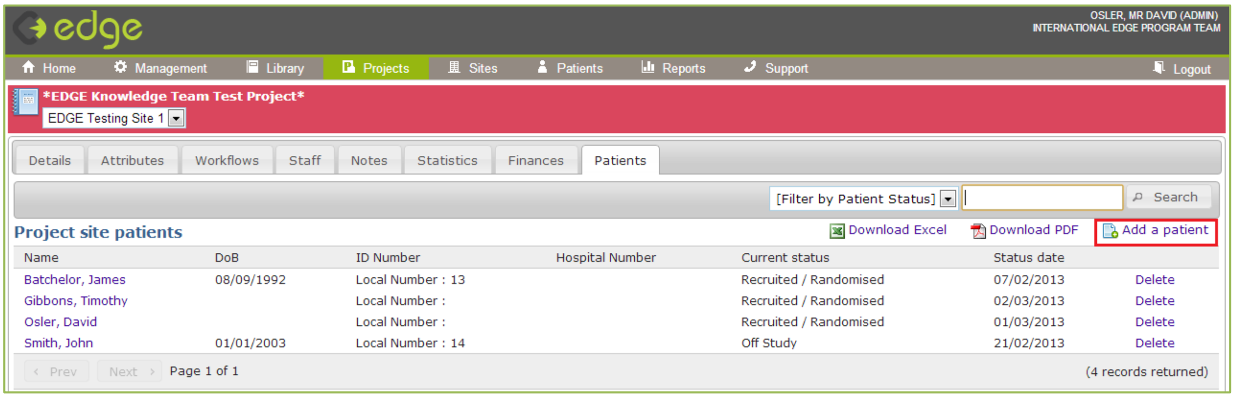
Your name and organisation will appear in the top right corner of the screen. When you have finished your session, click **LOGOUT** below your name to close your session securely.



Recruiting Patients to a Project & Site

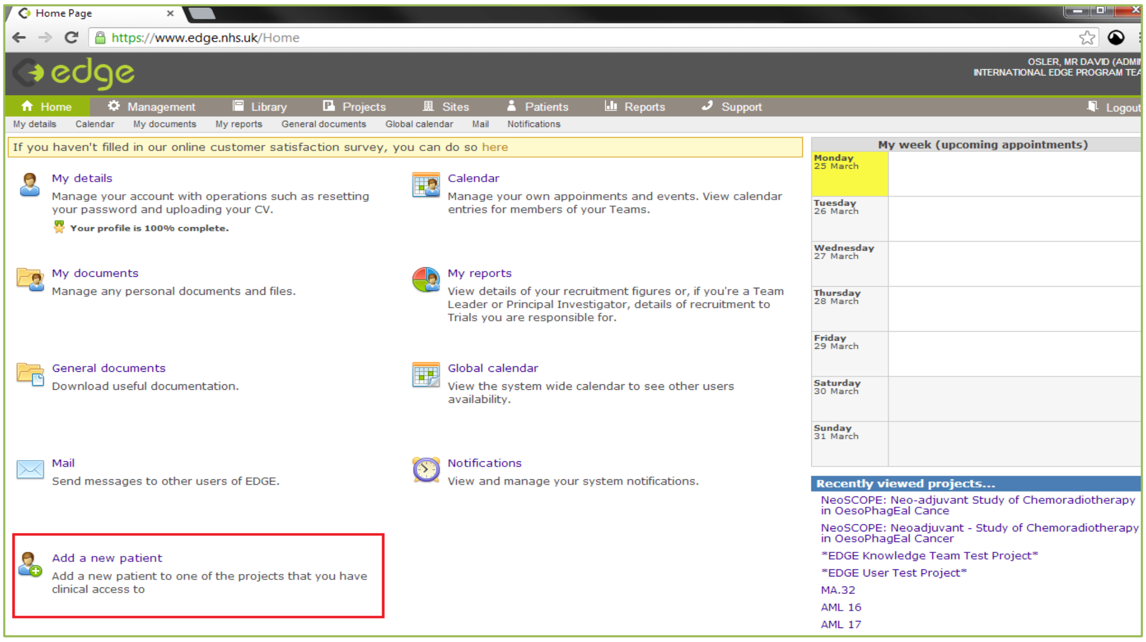
Patients can be added on to EDGE in two different ways. Firstly by locating the Project directly;

HOME > PROJECTS > ASSIGNED PROJECTS > (Select Applicable Project) > SITES > (Select Site) > PATIENT



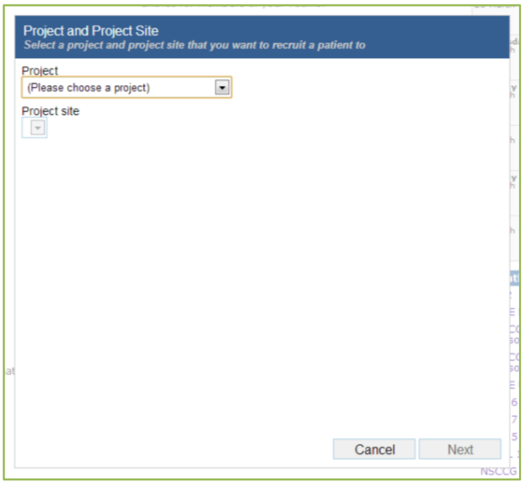
Or by using the quick link on the EDGE home screen;

HOME > ADD A PATIENT



Note:
The quick link allows users to add multiple patients to multiple projects quickly and easily without having to locate each project individually from the user's list of assigned projects.

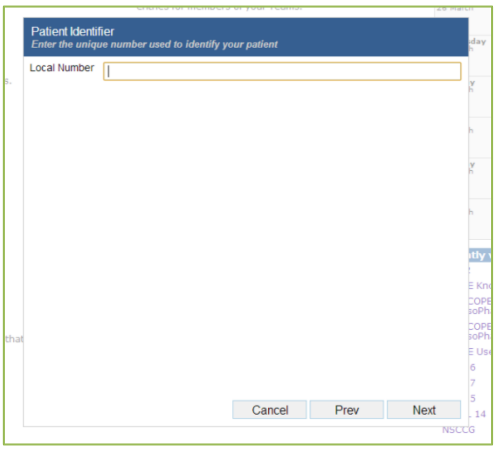
If you use the second method, you will need to select the project you are adding a patient to from the drop down list then select STH as the Project Site, and then click **NEXT.**



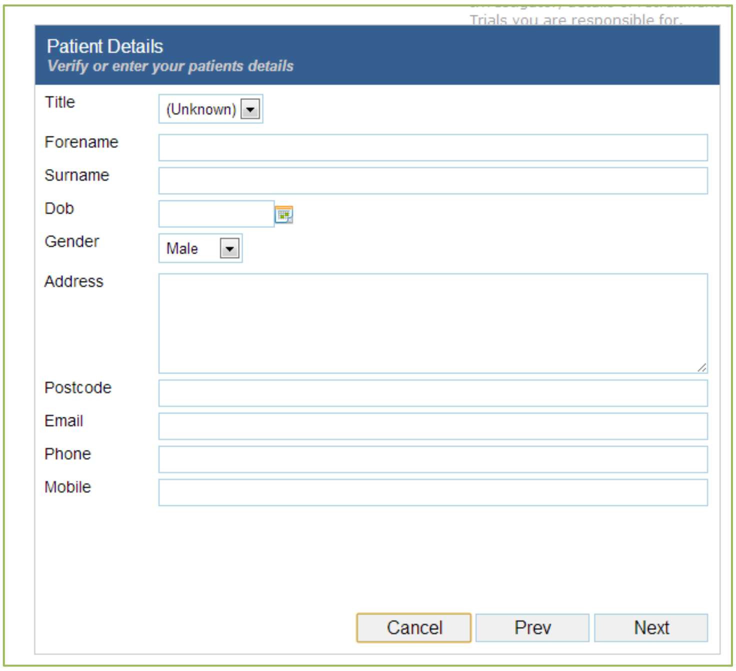
Note:
If you are unable to find your project or project recruitment site, please contact your Local EDGE Administrator and request clinical access at the Project Site level.

After clicking **NEXT**, you will be asked to enter the Patient Identifier details.

This will be the Local Number, i.e. a sequence of characters or numeric values used locally to identify a patient. It may also be a randomisation number.

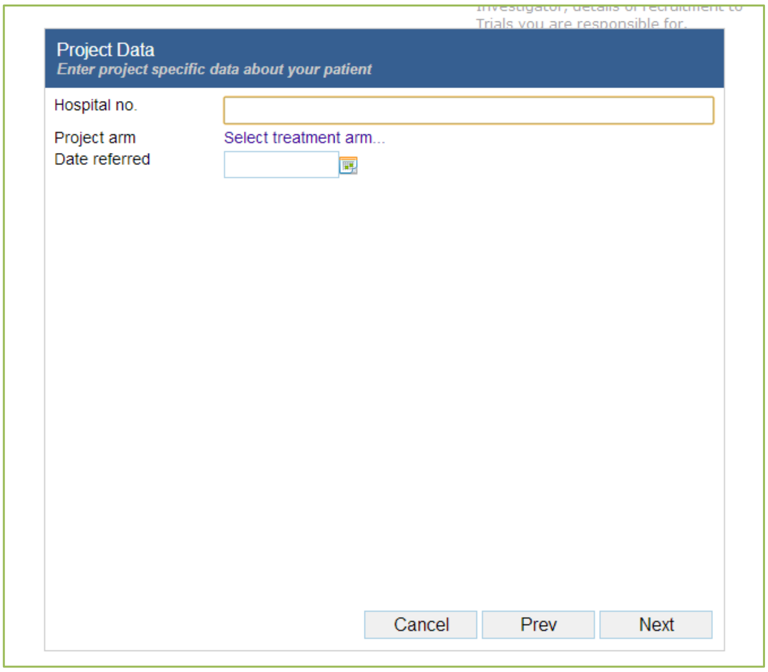


After clicking **NEXT** you will be asked to enter the patient's demographic information. Please note that Title, Forename and Surname are mandatory fields whilst DOB, Gender, Address, Postcode, Email, Phone and Mobile are optional.



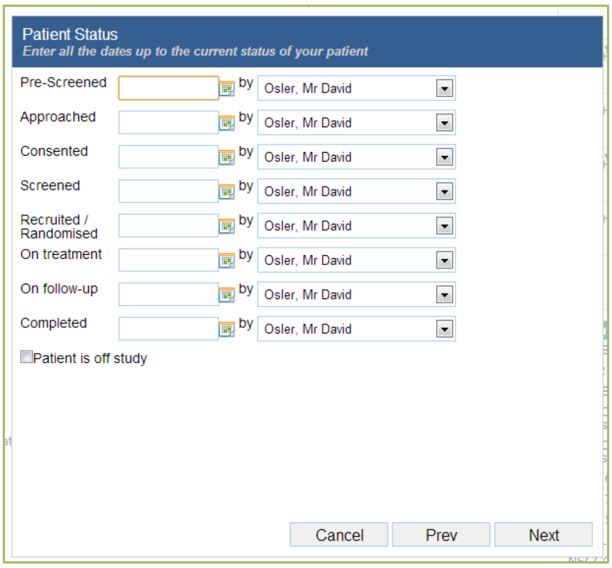
When the patient's details have been completed, click **NEXT**.

After clicking **NEXT** you will be directed to the **PROJECT DATA** screen to complete the patient's Hospital Number, Project Arm* and Date Referred if applicable. Please note that Hospital Number is mandatory.



*The Project Arms are defined at Project Level. If no Project Arms are available in the drop down list when adding a patient, you should contact your local EDGE Administrator to add the Arms. Please ensure that Project Arms are added to EDGE prior to adding patients to the study record and that they are taken directly from the Protocol using the exact naming convention.

After clicking **NEXT** you will be required to complete (or partially complete) the patient's status. These are all the stages that a patient may pass through on your Project.



This must be filled out in numerical order, starting with the date box at the top. Enter a date against the applicable fields. Please note that there cannot be any blanks in between two dates. For some types of studies, you may have the same date for more than one stage and this is acceptable, as long as they are in order.

If you are completing this on behalf of another member of staff then select their name in the drop down box to reference this activity against them. If you are trying to reference another user in the drop down box but their name is not available, contact your Local EDGE Administrator so that they can add that user to the Project site with Clinical access. Once you have completed the necessary information click **NEXT.**

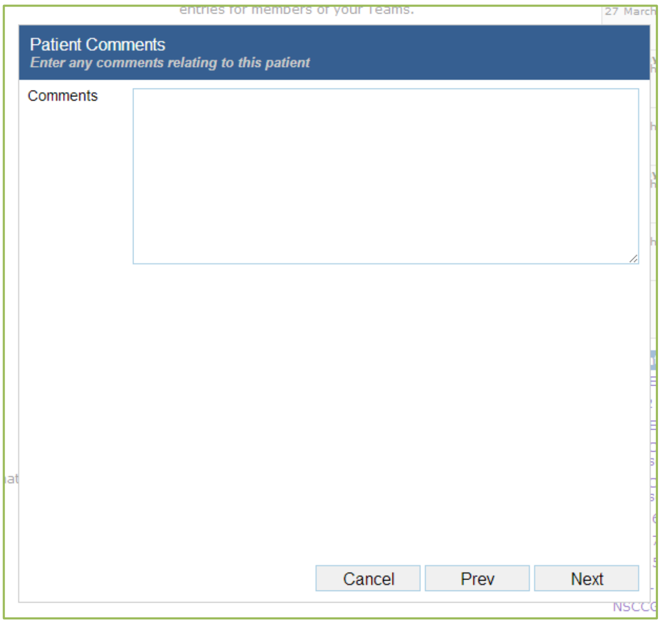
IMPORTANT: Please ensure that **both** the **Consented** date and **Recruited/Randomised*** date is completed for **each** patient, in order to ensure that the patient counts towards a study's accrual total.

***Recruitment** is the enrolment of an eligible participant who meets the study's inclusion criteria, into a research study. Each participant who has both provided informed consent and is taking part in the study should be recorded as a recruit.

Note: Screen failures do not count as a recruited participant.

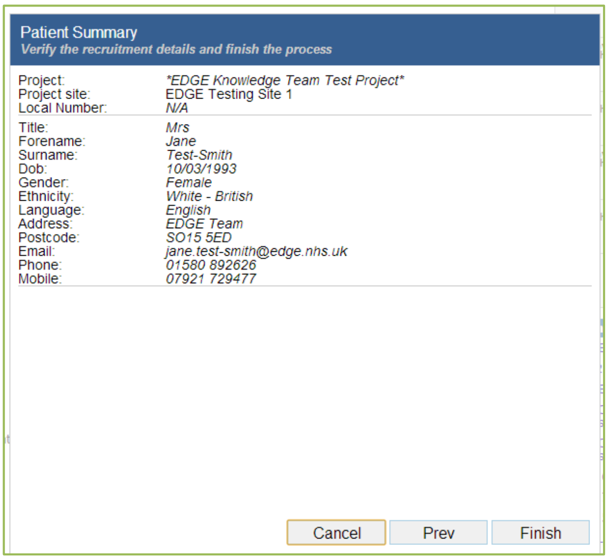
Source:
http://www.crn.nihr.ac.uk/wp-content/uploads//crnadmin/Recruitment-data-leaflet.pdf AND http://www.crn.nihr.ac.uk/wp-content/uploads//crnadmin/Recruitment-data-leaflet.pdf

After clicking **NEXT** you will have the option to add some free text comments to record against the patient record.



When you have completed the necessary information click **NEXT.**

Before completing the patient's recruitment, EDGE will display a summary page of the information you have entered. To correct or edit this information click the **PREV** tab, if all the details are correct click **FINISH**. To abandon the patient recruitment and remove all the data click **CANCEL**.



After clicking **FINISH**, a notification will appear in the top right corner of the screen to inform you that the patient has been added to the Project Site.

Note:
If you experience problems recruiting a patient, please contact your Study Manager or Local EDGE Administrator.

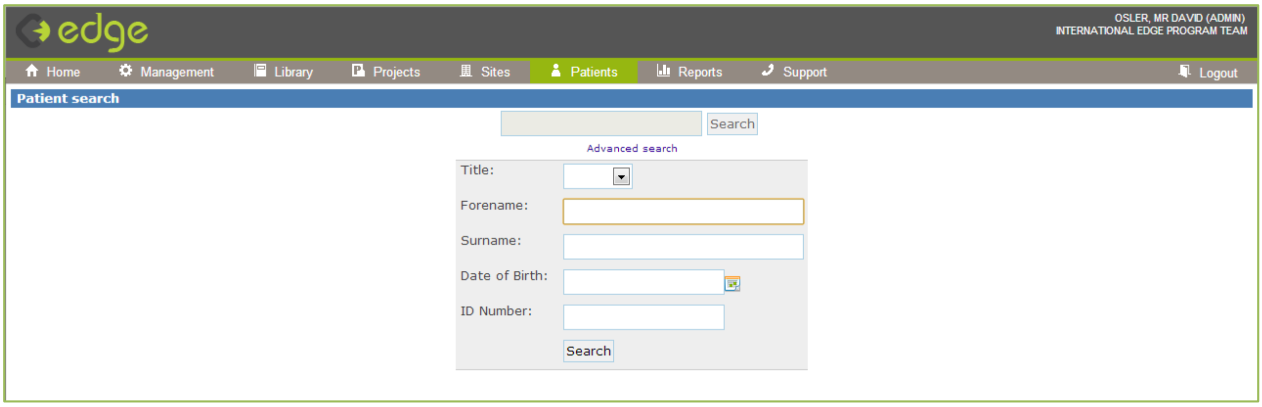
Finding Patients

HOME > PATIENTS

Users with clinical access on EDGE will be able to search for their patients by using the **PATIENTS** tab. This will display results for patients that have been added to project sites for which that user has Clinical access.

Administrators and Users will **NOT** be able to access patient information for Projects or Sites outside of their organisation or projects within their organisation for which they do not have clinical access.

To begin searching for a patient record, click the **PATIENT** tab from the **HOME SCREEN** of EDGE. If searching by name alone has returned multiple entries, you can click the **ADVANCE SEARCH** function to refine your search criteria further by date of birth and patient identifying number.

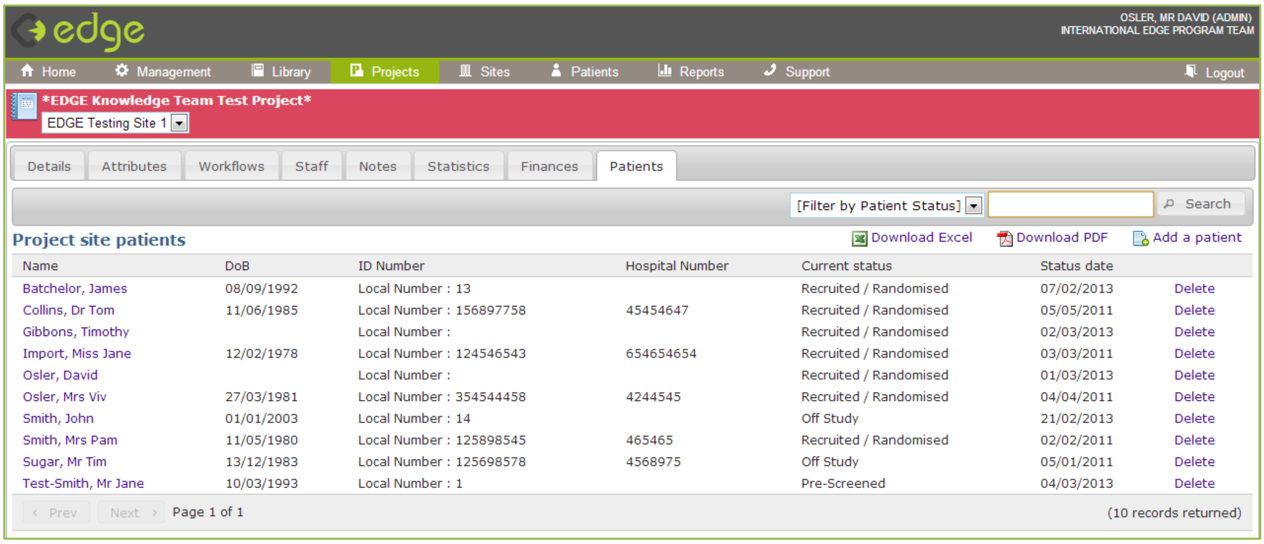


When you have located the patient record that you are looking for, click on the patient's name and this will take you to their record. From there you can access further details about the patient. There is also a hyperlink which will take you to the project site which they have been added from, where you can access their full patient record.

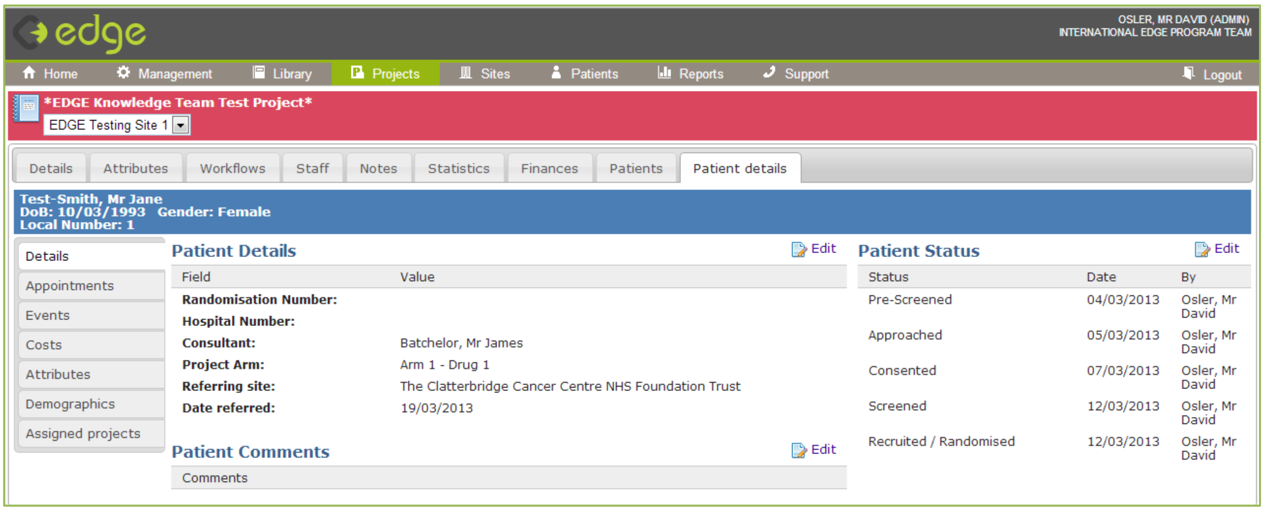
Update Full Patient Records

HOME > PROJECTS > ASSIGNED PROJECT (Select Applicable Project) > SITES > (Select Site) > PATIENTS

To update or amend a patient record or complete a patient's recruitment information, find the patient's name or identifying number from the list under the **PATIENT** tab at the Project Site. This list will contain all patients that have been added to the site.



Click the name of the relevant patient and their high level record will be opened. To edit or amend details, click **EDIT** next to the appropriate section. All Clinical Users at the Project Site Level can amend patient records.



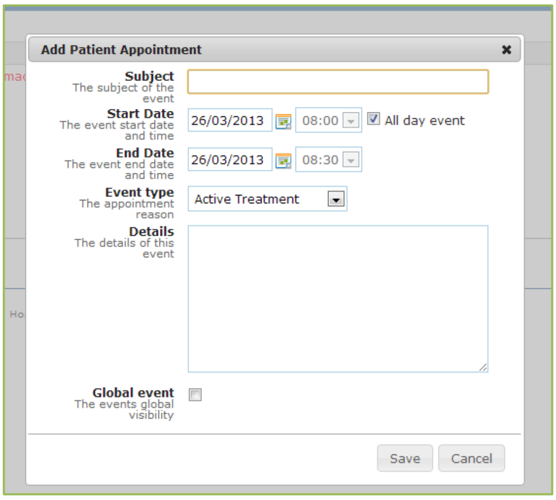
Patient Appointments

HOME > PROJECTS > ASSIGNED PROJECT (Select Applicable Project) > SITES > (Select Site) > PATIENTS > (Select Applicable Patient) > APPOINTMENTS

EDGE allows you to record and plan patient visits against individual patient records. Click the **APPOINTMENTS** tab and click **ADD**. You can populate this will the full schedule of visits or populate it as and when needed.
The **ADD PATIENT APPOINTMENT SCREEN** requires you enter data regarding the visit, including the subject, a start and end date as well as the event type and there is a free text field for comments.

If the Global Event box is left un-ticked, this appointment will only be displayed when a user looks at this individual patient's diary.

If the Global event box is ticked, then this will publish the appointment into the Global Calendar of every user who has Clinical access for that project at STH. Therefore, if you work across numerous projects, then you can look in your global calendar and see appointments for all patients on trials you are working on.

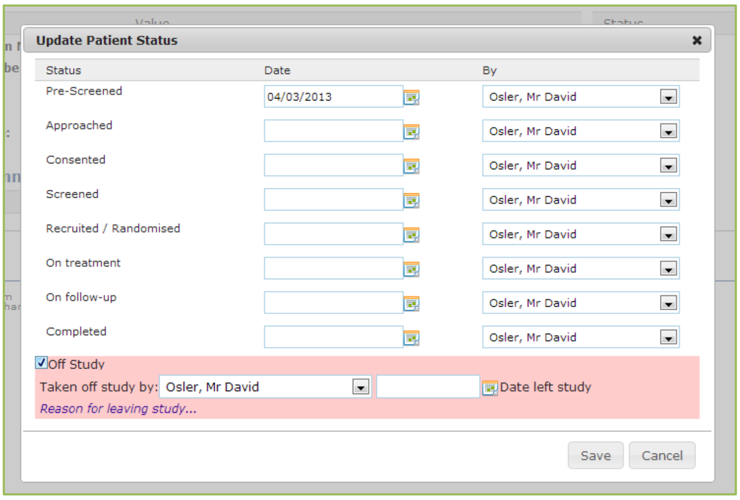


Off Study - Rejected/Withdrawn Patients

HOME > PROJECTS > ASSIGNED PROJECTS > (Select Applicable Project) > SITES > (Select Site) > PATIENT

If a patient does not complete their participation in a project due to being rejected (clinician decision) or withdrawing (patient decision) you can record this against the patient record in EDGE.

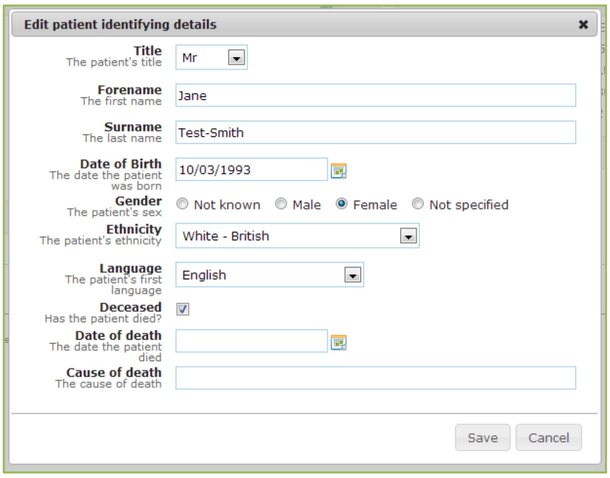
Within the **PATIENTS** tab at project site level click on the highlighted name of the applicable patient to access their record. Click **EDIT** against the **PATIENT STATUS** record and select **OFF STUDY.** A date, reason for leaving the project and who the patient was taken off study by, will need to be applied in order to record and report on withdrawal and rejection rates across the whole project.



Deceased Patients

HOME > PATIENTS > (Find Applicable Patient) > PATIENT DEMORGRAPHICS

To record that a patient has died during the course of a project, you must first locate their record at either the project site through the **PATIENTS** tab or via the **FIND PATIENTS** function on the **HOME SCREEN**. Upon locating the correct patient record, click their name to display their **FULL PATIENT RECORD**. Click **EDIT** within the **PATIENT DEMOGRAPHICS** section.



Within the **EDIT PATIENT DEMOGRAPHICS** window, check the box next to deceased and complete the date of death below as well as their cause of death. When you have completed these details click **SAVE**.

The patient will also need to be recorded as being off study with the applicable date and reason code. To perform these actions refer to the **OFF STUDY – REJECTED/WITHDRAWN PATIENT** section.

Support

In the first instance all queries should be directed to your local EDGE administrator:

Natasha Ottley
0114 226 5930
Natasha.ottley@sth.nhs.uk

Zoe Whiteley
0114 271 2572
Zoe.whiteley@sth.nhs.uk

Please also contact us if you have any feedback regarding this guide.