

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.

The screenshot shows the EDGE Home Screen interface. At the top, there is a navigation bar with the 'edge' logo on the left and the user's name 'KAPOOR, MS GAURIKA (ADMIN)' and organization 'SHEFFIELD TEACHING HOSPITALS NHS FOUNDATION TRUST' on the right. Below this is a grey task bar with tabs for Home, Management, Library, Projects, Sites, Patients, Reports, and Support. A 'Logout' button is also present.

The main content area is divided into several sections:

- My details:** Manage your account with operations such as resetting your password and uploading your CV. A progress bar indicates 'Your profile is 55% complete.'
- My reports:** View details of your recruitment figures or, if you're a Team Leader or Principal Investigator, details of recruitment to Trials you are responsible for.
- Mail:** Send messages to other users of EDGE.
- Calendar:** Manage your own appointments and events. View calendar entries for members of your Teams.
- General documents:** Download useful documentation.
- Notifications:** View and manage your system notifications.
- My documents:** Manage any personal documents and files.
- Global calendar:** View the system wide calendar to see other users availability.
- Add a new patient:** Add a new patient to one of the projects that you have clinical access to.

On the right side, there is a 'My week (upcoming appointments)' table:

My week (upcoming appointments)	
Wednesday 03 July	
Thursday 04 July	
Friday 05 July	
Saturday 06 July	
Sunday 07 July	
Monday 08 July	
Tuesday 09 July	

Below the table is a 'Recently viewed projects...' section with a list of projects:

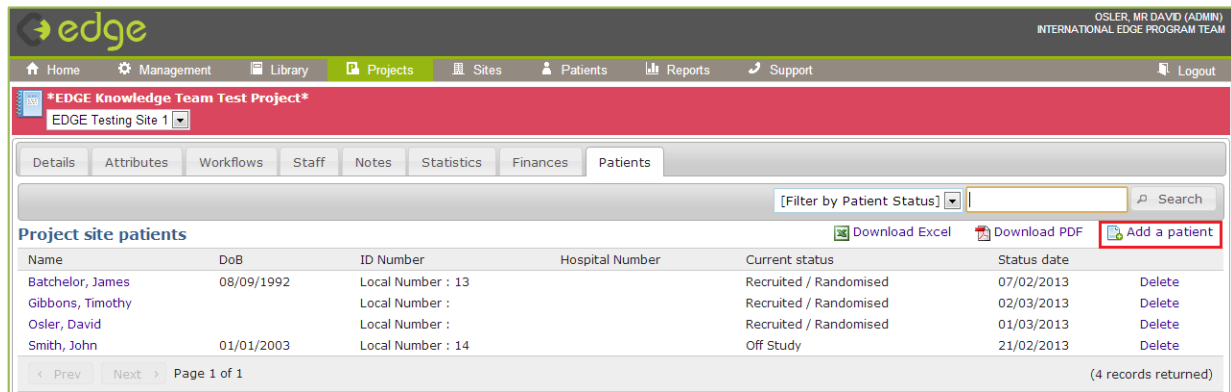
- Edge Test Study
- TICH2
- DIPALS Diaphragm pacing in motor neuron disease
- Pasireotide Therapy in Patients with Nelson's Syndrome
- AML 17
- AML 16
- PRESERVE

At the bottom left, there is a notification icon and the text 'Notifications: 0'.

Recruiting Patients to a Project & Site

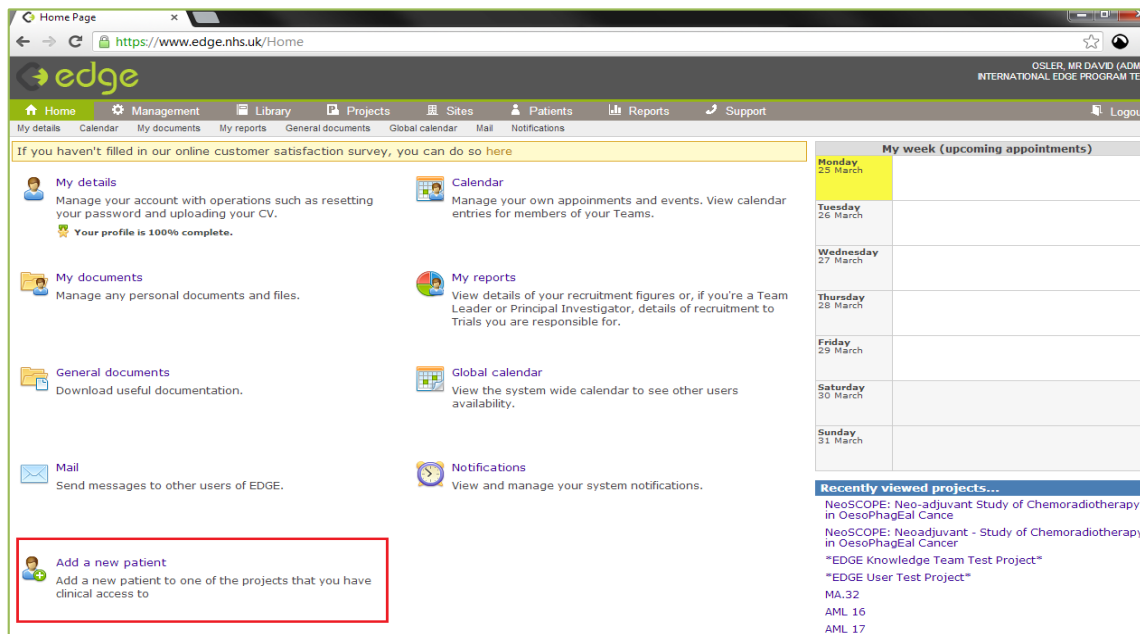
Patients can be added on to EDGE in two different ways. Firstly by locating the Project directly;

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



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

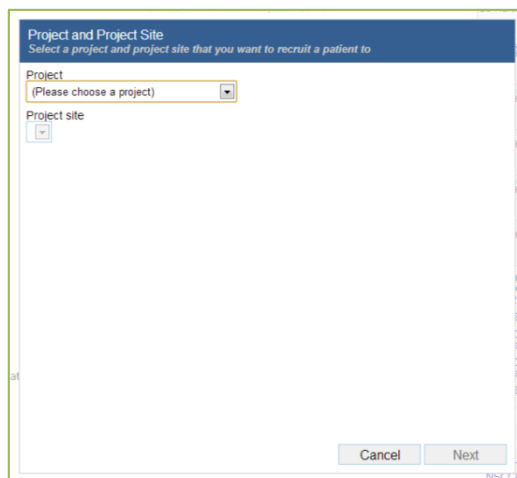
HOME > ADD A PATIENT



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**.

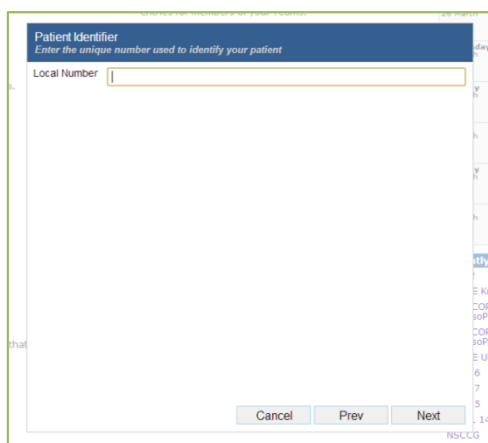


Note:

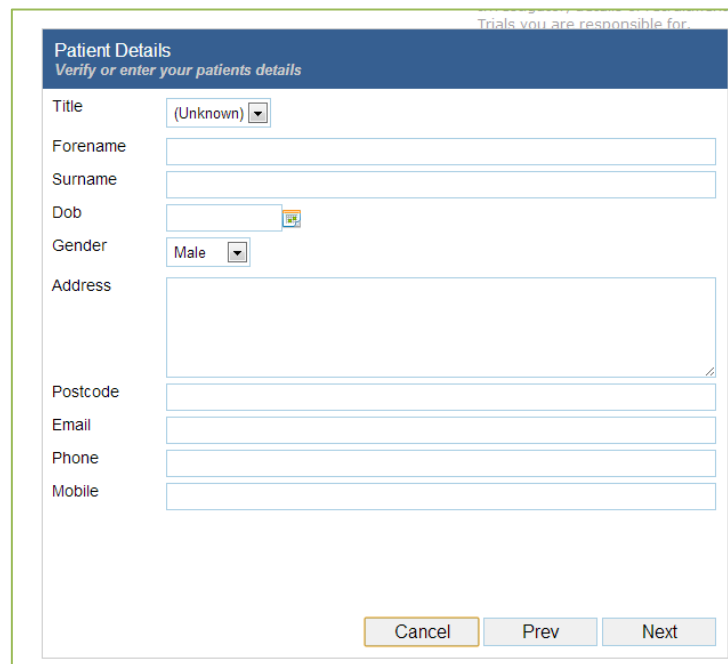
If you are unable to find your project or project recruitment site, please contact your Local EDGE Administrator and request clinical access at the Project Site level.

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.



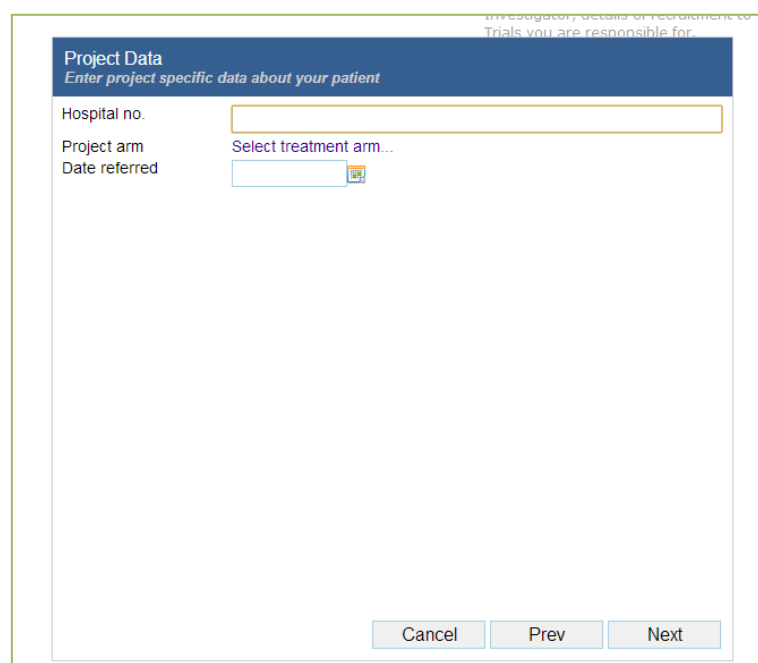
After clicking **NEXT** you will be asked to enter the patient's demographic information. Please note that Title, Forename and Surname are mandatory fields whilst DOB, Gender, Address, Postcode, Email, Phone and Mobile are optional.



The screenshot shows a web form titled "Patient Details" with the subtitle "Verify or enter your patients details". The form contains the following fields: Title (dropdown menu with "(Unknown)" selected), Forename (text input), Surname (text input), Dob (text input with a calendar icon), Gender (dropdown menu with "Male" selected), Address (large text area), Postcode (text input), Email (text input), Phone (text input), and Mobile (text input). At the bottom right, there are three buttons: "Cancel", "Prev", and "Next".

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 screenshot shows a web form titled "Project Data" with the subtitle "Enter project specific data about your patient". The form contains the following fields: Hospital no. (text input), Project arm (dropdown menu with "Select treatment arm..." selected), and Date referred (text input with a calendar icon). At the bottom right, there are three buttons: "Cancel", "Prev", and "Next".

*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.

Stage	Date	By
Pre-Screened	<input type="text"/>	Osler, Mr David
Approached	<input type="text"/>	Osler, Mr David
Consented	<input type="text"/>	Osler, Mr David
Screened	<input type="text"/>	Osler, Mr David
Recruited / Randomised	<input type="text"/>	Osler, Mr David
On treatment	<input type="text"/>	Osler, Mr David
On follow-up	<input type="text"/>	Osler, Mr David
Completed	<input type="text"/>	Osler, Mr David

Patient is off study

Cancel Prev Next

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.

entries for members of your teams. 27 March

Patient Comments
Enter any comments relating to this patient

Comments

Cancel Prev Next

NSCC

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**.

Patient Summary
Verify the recruitment details and finish the process

Project: *EDGE Knowledge Team Test Project*
Project site: EDGE Testing Site 1
Local Number: N/A

Title: Mrs
Forename: Jane
Surname: Test-Smith
Dob: 10/03/1993
Gender: Female
Ethnicity: White - British
Language: English
Address: EDGE Team
Postcode: SO15 5ED
Email: jane.test-smith@edge.nhs.uk
Phone: 01580 692626
Mobile: 07921 729477

Cancel Prev Finish

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.

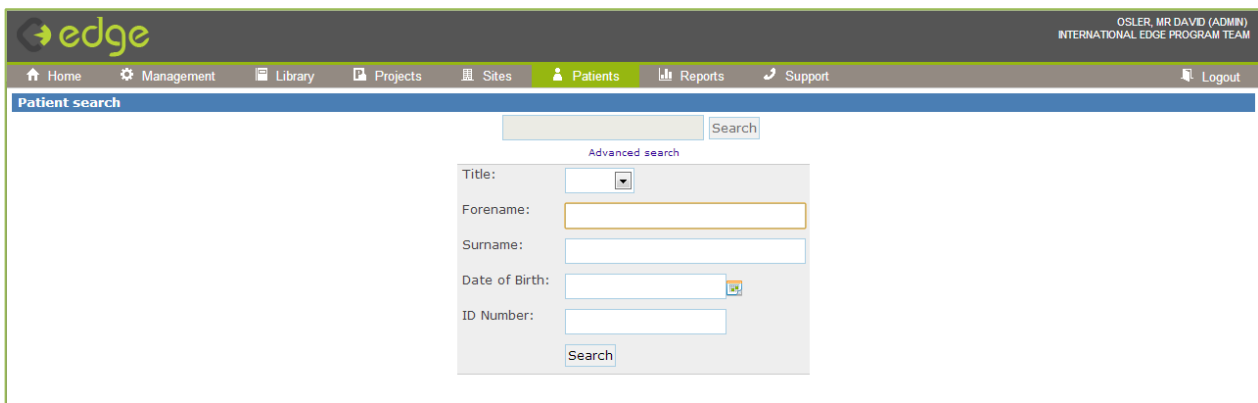
Finding Patients

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.



The screenshot displays the EDGE web application interface. At the top, the 'edge' logo is on the left, and the user's name 'OSLER, MR DAVID (ADMIN)' and 'INTERNATIONAL EDGE PROGRAM TEAM' are on the right. A navigation bar contains links for Home, Management, Library, Projects, Sites, Patients (highlighted), Reports, Support, and Logout. Below the navigation bar, the 'Patient search' section is visible. It features a search bar with a 'Search' button. Below this is an 'Advanced search' section with the following fields: 'Title' (a dropdown menu), 'Forename' (a text input field), 'Surname' (a text input field), 'Date of Birth' (a date picker), and 'ID Number' (a text input field). A 'Search' button is located at the bottom of the advanced search form.

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.

The screenshot shows the 'Project site patients' list in the EDGE system. The interface includes a navigation bar with 'Home', 'Management', 'Library', 'Projects', 'Sites', 'Patients', 'Reports', and 'Support'. The current page is for 'EDGE Testing Site 1' under the '*EDGE Knowledge Team Test Project*'. The 'Patients' tab is selected, and there is a search filter and a search button. Below the search bar is a table of patients with columns for Name, DoB, ID Number, Hospital Number, Current status, and Status date. Each row has a 'Delete' link. At the bottom, there are navigation links for 'Prev' and 'Next', and a page indicator 'Page 1 of 1' with '(10 records returned)'.

Name	DoB	ID Number	Hospital Number	Current status	Status date	
Batchelor, James	08/09/1992	Local Number : 13		Recruited / Randomised	07/02/2013	Delete
Collins, Dr Tom	11/06/1985	Local Number : 156897758	45454647	Recruited / Randomised	05/05/2011	Delete
Gibbons, Timothy		Local Number :		Recruited / Randomised	02/03/2013	Delete
Import, Miss Jane	12/02/1978	Local Number : 124546543	654654654	Recruited / Randomised	03/03/2011	Delete
Osler, David		Local Number :		Recruited / Randomised	01/03/2013	Delete
Osler, Mrs Viv	27/03/1981	Local Number : 354544458	4244545	Recruited / Randomised	04/04/2011	Delete
Smith, John	01/01/2003	Local Number : 14		Off Study	21/02/2013	Delete
Smith, Mrs Pam	11/05/1980	Local Number : 125898545	465465	Recruited / Randomised	02/02/2011	Delete
Sugar, Mr Tim	13/12/1983	Local Number : 125698578	4568975	Off Study	05/01/2011	Delete
Test-Smith, Mr Jane	10/03/1993	Local Number : 1		Pre-Screened	04/03/2013	Delete

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.

The screenshot shows the 'Patient details' view for 'Test-Smith, Mr Jane'. The interface includes a navigation bar with 'Home', 'Management', 'Library', 'Projects', 'Sites', 'Patients', 'Reports', and 'Support'. The current page is for 'EDGE Testing Site 1' under the '*EDGE Knowledge Team Test Project*'. The 'Patient details' tab is selected. The patient's name, DoB (10/03/1993), Gender (Female), and Local Number (1) are displayed. Below this is a table of 'Patient Details' with columns for Field and Value. To the right is a 'Patient Status' table with columns for Status, Date, and By. At the bottom, there is a 'Patient Comments' section with an 'Edit' link and a 'Comments' input field.

Field	Value
Randomisation Number:	
Hospital Number:	
Consultant:	Batchelor, Mr James
Project Arm:	Arm 1 - Drug 1
Referring site:	The Clatterbridge Cancer Centre NHS Foundation Trust
Date referred:	19/03/2013

Status	Date	By
Pre-Screened	04/03/2013	Osler, Mr David
Approached	05/03/2013	Osler, Mr David
Consented	07/03/2013	Osler, Mr David
Screened	12/03/2013	Osler, Mr David
Recruited / Randomised	12/03/2013	Osler, Mr David

Patient Appointments

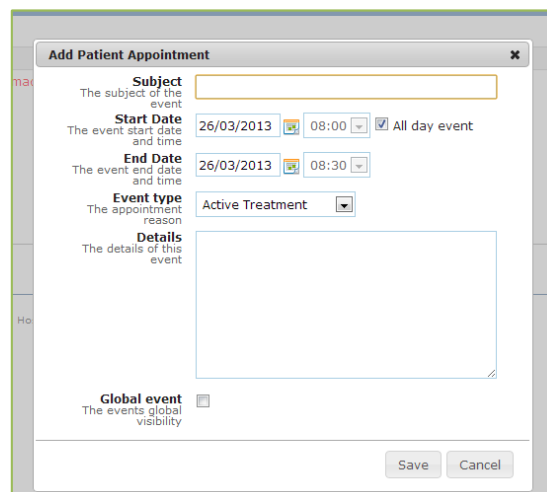
[HOME](#) > [PROJECTS](#) > [ASSIGNED PROJECT \(Select Applicable Project\)](#) > [SITES](#) > [\(Select Site\)](#) > [PATIENTS](#) > [\(Select Applicable Patient\)](#) > [APPOINTMENTS](#)

EDGE allows you to record and plan patient visits against individual patient records. Click the **APPOINTMENTS** tab and click **ADD**. You can populate this with 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.



The screenshot shows a web-based form titled "Add Patient Appointment". The form contains the following fields and options:

- Subject:** A text input field for "The subject of the event".
- Start Date:** A date and time selector showing "26/03/2013" at "08:00". It includes a calendar icon and a dropdown for time. A checkbox for "All day event" is checked.
- End Date:** A date and time selector showing "26/03/2013" at "08:30". It includes a calendar icon and a dropdown for time.
- Event type:** A dropdown menu with "Active Treatment" selected.
- Details:** A large text area for "The details of this event".
- Global event:** A checkbox for "The events global visibility", which is currently unchecked.

At the bottom right of the form are "Save" and "Cancel" buttons.

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.

Status	Date	By
Pre-Screened	04/03/2013	Osler, Mr David
Approached		Osler, Mr David
Consented		Osler, Mr David
Screened		Osler, Mr David
Recruited / Randomised		Osler, Mr David
On treatment		Osler, Mr David
On follow-up		Osler, Mr David
Completed		Osler, Mr David

Off Study

Taken off study by: Osler, Mr David

Date left study

Reason for leaving study...

Save Cancel

Deceased Patients

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

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.

The screenshot shows a web form titled "Edit patient identifying details". The form contains the following fields and options:

- Title**: The patient's title. Dropdown menu with "Mr" selected.
- Forename**: The first name. Text input field containing "Jane".
- Surname**: The last name. Text input field containing "Test-Smith".
- Date of Birth**: The date the patient was born. Date picker field showing "10/03/1993".
- Gender**: The patient's sex. Radio buttons for "Not known", "Male", "Female" (selected), and "Not specified".
- Ethnicity**: The patient's ethnicity. Dropdown menu with "White - British" selected.
- Language**: The patient's first language. Dropdown menu with "English" selected.
- Deceased**: Has the patient died? Checked checkbox.
- Date of death**: The date the patient died. Empty date picker field.
- Cause of death**: The cause of death. Empty text input field.

At the bottom right of the form are "Save" and "Cancel" buttons.

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.