

STH EDGE

Training Handbook

Version 1.5
(20 May 2016)

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Introduction

The Clinical Research Office, Sheffield (CRO) has implemented a new research database called EDGE to manage accrual reporting for all research studies.

EDGE is a web-based accrual reporting system that enables the CRO to track accrual for each study held in Sheffield Teaching Hospitals NHS Foundation Trust efficiently and effectively through a centrally held database.

EDGE also enables researchers to monitor their recruitment targets by inputting screening and recruitment information into one central place.

Definition of Recruitment

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/can-help/funders-academics/nihrcrn-portfolio/fags/>

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

Logging in to EDGE

www.edge.nhs.uk

Please enter your username (by default: your email address) and password as found in your registration 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.

The screenshot shows the login interface for the EDGE Clinical Research Management System. At the top, there is a logo for 'edge' with the tagline 'INTELLIGENT RESEARCH MANAGEMENT™'. Below the logo, there is a navigation bar with links for 'Login', 'Support', and 'Contact', and a website URL 'www.edgeclinicalresearch.com'. The main content area is divided into two sections. The left section, titled 'Clinical Research Management System', contains information about the system being part of the EDGE program, instructions for new users to contact their research department, a warning about unauthorized access, and a statement that the system is monitored at all times. The right section, titled 'Login', contains input fields for 'Email' and 'Password', a 'Login' button, and a link for 'Forgotten your password?'. The version number 'EDGE version 2.0.1.8' is displayed at the bottom right.

If this is the first time you have logged in to EDGE, you will need to change your password and 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 displays the EDGE Home Screen. At the top, a grey task bar features 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 the task bar, a navigation menu includes tabs for Home, Management, Library, Projects, Sites, Patients, Reports, and Support. The main content area is divided into several sections: 'My details' (account management), 'Calendar' (personal appointments), 'My documents' (personal files), 'My reports' (recruitment figures), 'General documents' (downloadable docs), 'Global calendar' (system-wide calendar), 'Mail' (messages), 'Notifications' (system alerts), and 'Add a new patient'. A 'My week (upcoming appointments)' table is shown on the right, listing dates from Wednesday 03 July to Tuesday 09 July. Below this, a 'Recently viewed projects...' section lists several projects: Edge Test Study, TICH2, DIPALS Diaphragm pacing in motor neuron disease, Pasireotide Therapy in Patients with Nelson's Syndrome, AML 17, AML 16, and PRESERVE. A notification bar at the bottom left indicates 'Notifications: 0'.

Day	Date
Wednesday	03 July
Thursday	04 July
Friday	05 July
Saturday	06 July
Sunday	07 July
Monday	08 July
Tuesday	09 July

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

Security – Changing your password

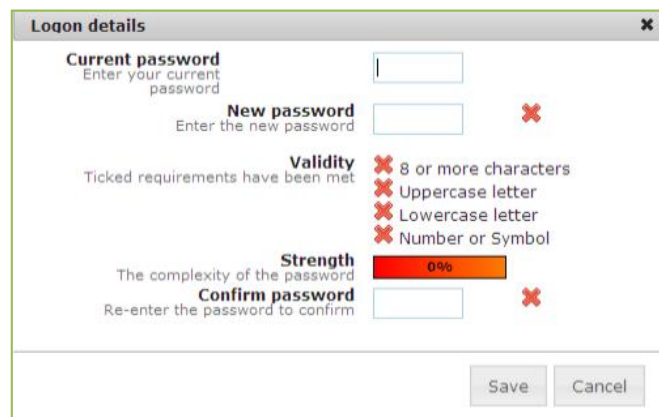
[HOME](#) > [MY DETAILS](#) > [MY LOGON DETAILS](#) > [CHANGE PASSWORD](#)

When logging on for the first time, you will be using a password which EDGE has automatically generated for you. Please change this password in **MY LOGON DETAILS** to something which you will remember.

Your password must meet the following criteria:

- At least eight characters long
- Uppercase characters (A-Z)
- Lowercase characters (a-z)
- Numbers or symbols (1 -9)

If your password does not comply with the above 4 conditions, it will not be accepted. A symbol will appear next to the unfulfilled criteria. All four must show a green tick next to them before the new password can be applied. You will need to enter your password twice in order to confirm it and then click **SAVE** to complete.



The screenshot shows a 'Logon details' dialog box with the following fields and validation status:

Field	Validation Status
Current password (Enter your current password)	Valid (no symbol)
New password (Enter the new password)	Invalid (Red X)
Validity (Ticked requirements have been met)	Invalid (Red X)
Strength (The complexity of the password)	Invalid (0% bar)
Confirm password (Re-enter the password to confirm)	Invalid (Red X)

The 'Validity' section lists the following requirements, all marked with a red X:

- 8 or more characters
- Uppercase letter
- Lowercase letter
- Number or Symbol

At the bottom right are 'Save' and 'Cancel' buttons.

Security – Security questions

[HOME](#) > [MY DETAILS](#) > [MY LOGON DETAILS](#) > [SECURITY QUESTIONS](#) > [EDIT](#)

EDGE enables you to set up two security questions for your account so that you can re-set your own password at the log in screen, should you need too.

These questions can be anything but must have an answer you will remember and should not be too generic. Please note that your security question answers are case sensitive.

When you have set up your two questions and answers, click **SAVE**.

Security questions

Question 1
The first security question

Mother's

Answer
The answer for the first security question

.....

Question 2
The second security question

Place of Birth

Answer
The answer for the second security question

.....

Save Cancel

Forgotten your Password

www.edge.nhs.uk

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. You must know your login (email address) in order to complete this process. If you are unable to log on using the **FORGOTTEN YOUR PASSWORD** link, please contact your Local EDGE Administrator in the first instance.

The screenshot shows the EDGE Clinical Research Management System login interface. At the top is the EDGE logo with the tagline 'INTELLIGENT RESEARCH MANAGEMENT™'. Below the logo is a navigation bar with links for 'Login', 'Support', and 'Contact', and a website URL 'www.edgeclinicalresearch.com'. The main content area is divided into two sections. The left section, titled 'Clinical Research Management System', contains text stating 'This system is part of the EDGE program.' and 'If you are not currently a user please contact your research department for a username or contact the EDGE delivery team.' The right section, titled 'Login', contains fields for 'Email' and 'Password', a 'Login' button, and a link for 'Forgotten your password?'. A modal dialog box titled 'Step 2 of 3 - Security Questions' is overlaid on the login form. It contains two text input fields labeled 'Mothers Maiden Name' and 'Place of Birth', and buttons for 'Back', 'Next', and 'Cancel'. The text 'EDGE version 2.0.2.4' is visible in the bottom right corner of the login form area.

My Details – Updating contact details

HOME > MY DETAILS > EDIT

When you first access EDGE, please ensure that all of your contact details are correct, including contact number and address. To update your information, click **EDIT** in the top right corner and amend the details.

The screenshot shows the 'My Details' page for Ms Gaurika Kapoor. The page has a header with the 'edge' logo and user information: 'KAPOOR, MS GAURIKA (ADMIN)' and 'SHEFFIELD TEACHING HOSPITALS NHS FOUNDATION TRUST'. A navigation bar includes links for Home, Management, Library, Projects, Sites, Patients, Reports, Support, and Logout. Below this, a sub-navigation bar shows 'My details', 'My logon details', 'My qualifications', 'My specialities', and 'My training'. The main content area displays a profile for 'Kapoor, Ms Gaurika' with an 'Edit' button. The profile includes a placeholder for a profile picture and a table of details:

Field	Value
Title:	Ms
Forename:	Gaurika
Surname:	Kapoor
Gender:	Female
Date of Birth:	
Address:	Clinical Research Office, Sheffield Teaching Hospitals NHS FT
Postcode:	S10 2SE
Email:	gaurika.kapoor@sth.nhs.uk
Phone:	0114 226 5939
Mobile:	
Fax:	0114 226 5937
Pager:	
Personal Url:	
Professional Registration Number:	
Organisation:	Sheffield Teaching Hospitals NHS Foundation Trust
Is Organisation Administrator:	Yes

Below the table, there are 'Completion tips' and a 'Notifications: 0' indicator.

When you have finished, click **SAVE** to apply the changes. If your details change, please ensure you update the system as soon as possible.

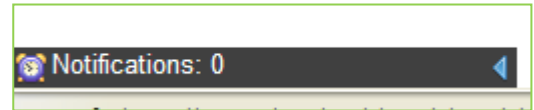
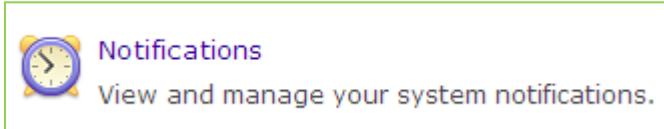
The screenshot shows the 'Edit My Details' form, which is a modal window overlaid on the 'My Details' page. The form contains the following fields:

- Title:** Ms (dropdown)
- Forename:** Gaurika (text input)
- Surname:** Kapoor (text input)
- Gender:** Female (dropdown)
- Date of Birth:** (text input with a calendar icon)
- Address:** Clinical Research Office, Sheffield Teaching Hospitals NHS FT (text input)
- Postcode:** S10 2SE (text input)
- Email:** gaurika.kapoor@sth.nhs.uk (text input)
- Phone:** 0114 226 5939 (text input)
- Mobile:** (text input)
- Fax:** 0114 226 5937 (text input)
- Pager:** (text input)
- Personal URL:** (text input)
- Professional Registration Number:** (text input)
- Organisation:** Sheffield Teaching Hospitals NHS Foundation Trust (text input)

Notifications

HOME > NOTIFICATIONS

Once at the home screen, the notifications area in the bottom left corner of the browser window will inform you of any activity that has taken place since you last logged on which may require your attention.



To access this information, click the grey **NOTIFICATIONS** tab and you will be directed to the five most recent notifications and the actions required. To see all pending notifications, click on the **NOTIFICATIONS** icon on the home screen.

Searching for a Project

PROJECTS

To search for a project, click on the 'Projects' Tab at the top of the screen.

Note: The last 10 projects that you viewed will be displayed at the bottom right of the home screen

The screenshot shows the EDGE system home screen. The top navigation bar includes tabs for Home, Management, Library, Projects, Sites, Patients, Reports, and Support. The 'Projects' tab is highlighted. Below the navigation bar, there are several sections: 'My details', 'My reports', 'Mail', 'Calendar', 'General documents', 'Global calendar', 'My documents', and 'Add a new patient'. A red arrow points to the 'Projects' tab. On the right side, there is a 'My week (upcoming appointments)' calendar and a 'Recently viewed projects...' section. The 'Recently viewed projects...' section is highlighted with a yellow box and lists the following projects: Edge Test Study, TICH2, DIPALS Diaphragm pacing in motor neuron disease, Pasireotide Therapy in Patients with Nelson's Syndrome, AML 17, AML 16, and PRESERVE.

There are two methods of searching:

Assigned projects (projects which you have been assigned to) and Organisation Projects (studies which STH is involved in).

The screenshot shows the EDGE system search results page. The 'Assigned Projects' tab is selected. The search results table shows one project: AML 16, National Cancer Research Institute Acute Myeloid Leukaemia and High Risk Myelodysplastic Syndrome Trial 16, owned by NCRN Coordinating Centre, with status 'Closed to recruitment - in follow up'. The table lists various sites including Addenbrooke's Hospital, Aintree University Hospitals NHS Foundation Trust, and others.

NIHR Portfolio Study ID	Title	Description	Owner	Status	Sites
1520	AML 16	National Cancer Research Institute Acute Myeloid Leukaemia and High Risk Myelodysplastic Syndrome Trial 16	NCRN Coordinating Centre	Closed to recruitment - in follow up	Addenbrooke's Hospital(Closed to recruitment - in follow up) Aintree University Hospitals NHS Foundation Trust(Closed to recruitment - in follow up) Airedale NHS Foundation Trust(Closed) Belfast Health and Social Care Trust(Closed to recruitment - in follow up) Birmingham Women's NHS Foundation Trust(Open) Blackpool Victoria Hospital - Blackpool Teaching Hospitals NHS Foundation Trust(Closed to recruitment - in follow up) Bolton NHS Foundation Trust(Closed to recruitment - in follow up) Borders General Hospital(Closed to recruitment - in follow up) Bradford Teaching Hospitals NHS Foundation Trust(Closed)

edge

Home Management Library **Projects** Sites Patients Reports Support

Project type: Assigned Projects Organisation projects Global projects

Title/Description: **a**

Type: (All)

Disease area: (All)

Disease site: (All)

Project Local Reference: **b**

NIHR Portfolio Study ID: **c**

Owner: (All) - Choose an organisation...

Chief Investigator: **d** (All) - Choose chief investigator...

Status: (All)

Visibility: (All)

MREC Number: **e**

Search Reset form

Search results Download Excel

You can search for a project in a number of ways (this is the same on both the assigned and organisation search)

- a) Title/Description
- b) Project Local Reference (STH Number)
- c) NIHR Portfolio Study ID (if the study has been adopted by the NIHR)
- d) Chief Investigator
- e) MREC Number

Once you have typed in your method of searching, click **SEARCH** and all studies will be displayed in the results underneath. To open your study, click on the blue title on the left hand side, under the 'Title' column.

edge

KAPOOR, MS GAURIKA (ADMIN)
SHEFFIELD TEACHING HOSPITALS NHS FOUNDATION TRUST

Home Management Library **Projects** Sites Patients Reports Support Logout

Project type: Assigned Projects Organisation projects Global projects

Title/Description:

Type: (All)

Disease area: (All)

Disease site: (All)

Project Local Reference:

NIHR Portfolio Study ID:

Owner: (All) - Choose an organisation...

Chief Investigator: (All) - Choose chief investigator...

Status: (All)

Visibility: (All)

MREC Number:

Search Reset form

Search results Download Excel Download PDF

Page 1 of 1 (7 records returned)

NIHR Portfolio Study ID	Title	Description	Owner	Status	Sites
1520	AML 16	National Cancer Research Institute Acute Myeloid Leukaemia and High Risk Myelodysplastic Syndrome Trial 16	NCRN Coordinating Centre	Closed to recruitment - in follow up	Addenbrooke's Hospital(Closed to recruitment - in follow up) Aintree University Hospitals NHS Foundation Trust(Closed to recruitment - in follow up) Airedale NHS Foundation Trust(Closed) Belfast Health and Social Care Trust(Closed to recruitment - in follow up) Birmingham Women's NHS Foundation Trust(Open) Blackpool Victoria Hospital - Blackpool Teaching Hospitals NHS Foundation Trust(Closed to recruitment - in follow up) Bolton NHS Foundation Trust(Closed to recruitment - in follow up) Borders General Hospital(Closed to recruitment - in follow up) Bradford Teaching Hospitals NHS Foundation Trust(Closed)

Project Level Information (Defined by a GREEN Border)

When you open a study, you will see the page below. The information on this page is at **project level**, so it will list the Chief Investigator, Sponsor, Funder, study status, whether the study is multicentre, type of study, etc. The STH Number is also on this page.

The screenshot shows the 'Edge Test Study' project details page. The page is titled 'Edge Test Study' and has a green header bar. The main content area is divided into two columns. The left column contains a list of tabs: Details, Attributes, Workflows, Staff, Notes, Statistics, and Finances. The right column contains the project details. A red arrow points from the text 'STH No' to the 'Local Project Reference' field, which contains the value 'STH55555'.

Field	Value
Owned by:	Sheffield Teaching Hospitals NHS Foundation Trust
Title:	Edge Test Study
Display title:	Edge Test Study
Description:	Edge Test Study
Status:	Project in Setup
Visibility:	Private
Phase:	Not Applicable
Randomisation:	
Project Type:	Academic/Student
Adopted Network:	
Co-adopted Network:	
Chief investigator:	Patel, Dr Ramila
Start date:	01/06/2013
End date:	01/06/2014
Disease area:	Neurological ()
Patient workflow:	Observational Default
Patient data collection plan:	

Local Project Reference: STH55555

Note: You will not be able to edit this page. If you do notice any mistakes, please contact your Local EDGE Administrator, who can arrange for the information to be changed.

Site Level Information (Defined by a RED border)

To upload recruitment to the study, you will need to access the project at **site level**.

To do this, click on **SITES** on the left hand side of the screen at project level and click Sheffield Teaching Hospitals NHS Foundation Trust in blue text.

The screenshot shows the 'Edge Test Study' interface. On the left, a sidebar menu has 'Sites' highlighted with a red border. The main content area is titled 'Project sites' and contains a table with the following data:

Site	Status	Type	Owner	PI	
Sheffield Teaching Hospitals NHS Foundation Trust	Open	Recruiting Site Only	Sheffield Teaching Hospitals NHS Foundation Trust	Kapoor, Ms Gaurika	Unassign
Sheffield Teaching Hospitals NHS Foundation Trust					

You will then see the **Site Level** window as shown below:

The screenshot shows the 'Project site details' window for the 'Sheffield Teaching Hospitals NHS Foundation Trust' site. The window is divided into two main sections: 'Details' and 'Recruitment (My Organisation)'. The 'Details' section contains the following information:

Details	
Owned by:	Sheffield Teaching Hospitals NHS Foundation Trust
Site (Parent):	Sheffield Teaching Hospitals NHS Foundation Trust (Sheffield Teaching Hospitals NHS Foundation Trust)
Status:	Open
Type:	Recruiting Site Only
Principal Investigator:	Kapoor, Ms Gaurika
Site target recruitment:	100
R&D submission date:	
Start date (NHS Permission):	30/04/2013
SIV date:	
Open to recruitment:	30/04/2013
Recruitment end date (Planned):	01/01/2014
Recruitment end date (Actual):	
Planned closing date:	01/06/2014
Closed date:	
Patient data collection plan:	(System default)
Patient identifier type:	Local Number

The 'Recruitment (My Organisation)' section contains the following information:

Recruitment (My Organisation)	
First patient consented:	08/02/2013
First patient recruited:	01/04/2013
Recruitment clock (days):	-29
Estimated Annual Target:	100
Estimated Months Running:	8.2
Actual recruitment:	4 (4.00%)

The 'Recruitment (Any Organisation)' section contains the following information:

Recruitment (Any Organisation)	
First patient recruited:	08/02/2013
First patient recruited:	01/04/2013
Recruitment clock (days):	-29
Estimated Annual Target:	100
Estimated Months Running:	8.2
Actual recruitment:	4 (4.00%)

The bottom of the window shows the 'Key staff' section with 'Lead nurse(s):' and 'Co-Investigator(s):' fields. The footer indicates 'Last edited: 30/04/2013 10:33 by: Kapoor, Ms Gaurika (Sheffield Teaching Hospitals NHS Foundation Trust)'.

You can also go straight to the site page from the search page (as described on p12 of this manual). To do this, search for the project and click on the site name in blue text down the right hand side, under the 'Sites' column.

Project type: [Assigned Projects](#) [Organisation projects](#) [Global projects](#)

Title/Description:

Type: (All)

Disease area: (All)

Disease site: (All)

Project Local Reference:

NIHR Portfolio Study ID:

Owner: (All) - Choose an organisation...

Chief Investigator: (All) - Choose chief investigator...

Status: (All)

Visibility: (All)

MREC Number:

Search results [Download Excel](#) [Download PDF](#)

< Prev Next > Page 1 of 1 (5 records returned)

NIHR Portfolio Study ID	Title	Description	Owner	Status	Sites
10660	DiPALS Diaphragm pacing in motor neuron disease	A randomised controlled trial evaluating NeuRx/4 Diaphragm Pacing in patients with respiratory muscle weakness due to Motor Neurone Disease	NIHR Coordinating Centre	Open	Plymouth Hospitals NHS Trust(Open) Sheffield Teaching Hospitals NHS Foundation Trust(Open)
	Edge Test Study	Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust	Project in Setup	Sheffield Teaching Hospitals NHS Foundation Trust(Open)

Once you have clicked on Sheffield Teaching Hospitals NHS Foundation Trust, you will see the page below. The information on this page is at **site level**, and will list information such as the site status of the study, who the Principal Investigator is and site target recruitment.

Home Management Library **Projects** Sites Patients Reports Support Logout

Edge Test Study
Sheffield Teaching Hospitals NHS Foundation Trust

Details Attributes Workflows Staff Notes Statistics Finances Patients

Project site details [Transfer ownership](#)

Details [Edit](#)

Owned by: Sheffield Teaching Hospitals NHS Foundation Trust

Site (Parent): Sheffield Teaching Hospitals NHS Foundation Trust (Sheffield Teaching Hospitals NHS Foundation Trust)

Status: Open

Type: Recruiting Site Only

Principal Investigator: Kapoor, Ms Gaurika

Site target recruitment: 100

R&D submission date:

Start date (NHS Permission): 30/04/2013

SIV date:

Open to recruitment: 30/04/2013

Recruitment end date (Planned): 01/01/2014

Recruitment end date (Actual):

Planned closing date: 01/06/2014

Closed date:

Patient data collection plan: (System default)

Patient identifier type: Local Number

Key staff

Lead nurse(s):

Co-Investigator(s):

Recruitment (My Organisation)

First patient consented: 08/02/2013

First patient recruited: 01/04/2013

Recruitment clock (days): -29

Estimated Annual Target: 100

Estimated Months Running: 8.2

Actual recruitment: 4 (4.00%)

Recruitment (Any Organisation)

First patient recruited: 08/02/2013

First patient recruited: 01/04/2013

Recruitment clock (days): -29

Estimated Annual Target: 100

Estimated Months Running: 8.2

Actual recruitment: 4 (4.00%)

Last edited: 30/04/2013 10:33 by: Kapoor, Ms Gaurika (Sheffield Teaching Hospitals NHS Foundation Trust)

Notifications: 0

The definitions of the dates at **site level** are as follows:

- R&D Submission date: Date of valid SSI form submission(if applicable)
- Start Date (NHS Permission): Date STH issued R&D approval
- SIV Date: Site Initiation Visit date (if applicable)
- Open to Recruitment Date: The date the site was opened for recruiting patients
- Recruitment End Date (Planned): Planned site end of recruitment date
- Recruitment End Date (Actual): Actual site end of recruitment date
- Planned Closing Date: The planned date at which all activity at the site will cease (end date from SSI form)
- Closed Date: Actual date when all project activity at site closed


This page will identify when the first patient was recruited to the study and then self-populate the recruitment clock and actual recruitment. It will give you your recruitment percentage and from this you can work out if you are on course to meet your recruitment target.

Note: The CRO will also monitor recruitment using this page

Site Attributes

The attributes at **site level** are reflections of pieces of information which need to be captured at **site level** only. For STH, the extra attributes captured are:

- STH Directorate
- Target Patient First Visit Date – For e.g., if the study has a target recruitment of 50 patients, then this would be the date the 50th patient was recruited/randomised
- Last Patient Last Visit Date




KAPOOR, MS GAURIKA (ADMIN)
SHEFFIELD TEACHING HOSPITALS NHS FOUNDATION TRUST

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Edge Test Study
Sheffield Teaching Hospitals NHS Foundation Trust

[Details](#) [Attributes](#) [Workflows](#) [Staff](#) [Notes](#) [Statistics](#) [Finances](#) [Patients](#)

Project site attributes

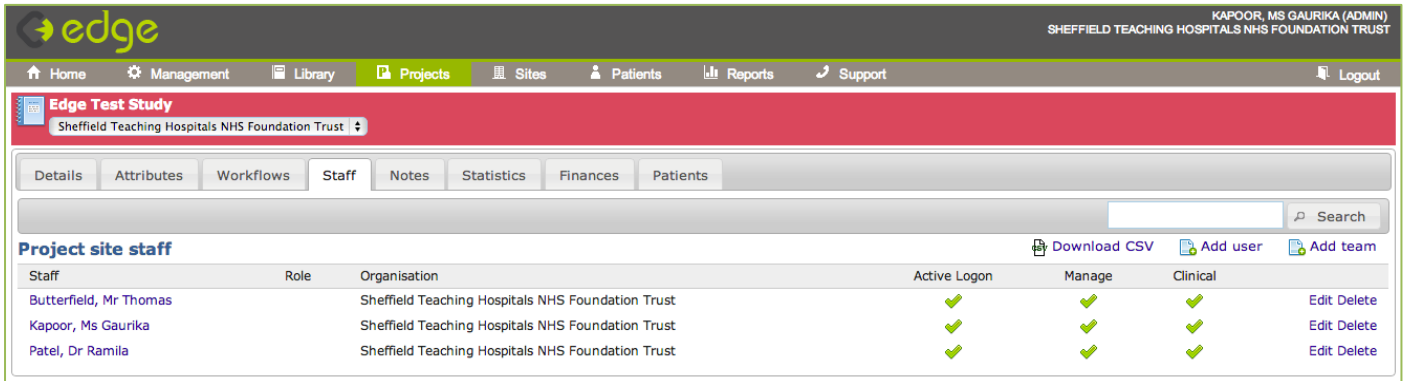
 Add

Entity	Public	Attribute	Value	
STH Specific	✗	STH Directorate	Oral & Dental	Edit all
	✗	Target Patient First Visit		Edit Delete Audit
	✗	Last Patient Last Visit		Edit Delete Audit

Clinical Informatics Research Unit, EDGE Program
Somers Cancer Research Building, MPB24, Southampton General Hospital, Southampton
SO16 6YD, United Kingdom

Site Staff

The **Site level** staff tab contains the names of staff against assigned to that project at their specific **site level**. Users will be able to view this information, including who has clinical rights*.



The screenshot shows the 'Edge Test Study' interface for 'Sheffield Teaching Hospitals NHS Foundation Trust'. The 'Projects' tab is selected, and the 'Staff' sub-tab is active. The 'Project site staff' table lists three staff members: Butterfield, Mr Thomas; Kapoor, Ms Gaurika; and Patel, Dr Ramila. All three are associated with 'Sheffield Teaching Hospitals NHS Foundation Trust' and have 'Active', 'Logon', 'Manage', and 'Clinical' rights indicated by green checkmarks. Each row has 'Edit' and 'Delete' links. The interface also includes a search bar, 'Download CSV', 'Add user', and 'Add team' options.

Staff	Role	Organisation	Active	Logon	Manage	Clinical	
Butterfield, Mr Thomas		Sheffield Teaching Hospitals NHS Foundation Trust	✓	✓	✓	✓	Edit Delete
Kapoor, Ms Gaurika		Sheffield Teaching Hospitals NHS Foundation Trust	✓	✓	✓	✓	Edit Delete
Patel, Dr Ramila		Sheffield Teaching Hospitals NHS Foundation Trust	✓	✓	✓	✓	Edit Delete



*All staff members at site level who will be actively recruiting patients to a project will need to have clinical access. This can include staff who are entering recruitment details on someone else's behalf, such as Data Managers and Coordinators.

Site Statistics

The statistics tab within a project **site level** ties in with the information presented at the **project level** KPIs tab. It breaks down the total project recruitment at a specific site across all users at that site. The Total Accrual, Annual Accrual and Current Status take a real-time snapshot of the project's patients and their status within the trial.

Details	Attributes	Workflows	Staff	Notes	Statistics	Finances	Patients															
Total accrual	Show only my organisation																					
Annual accrual	Total Accrual Download Excel Download PDF																					
Current status	<table><tr><td>Site</td><td>Screened</td><td>Recruited</td><td>Rejected</td><td>Withdrawn</td></tr><tr><td colspan="5">No data is currently available</td></tr><tr><td>Total accrual</td><td>0</td><td>0</td><td>0</td><td>0</td></tr></table>							Site	Screened	Recruited	Rejected	Withdrawn	No data is currently available					Total accrual	0	0	0	0
Site	Screened	Recruited	Rejected	Withdrawn																		
No data is currently available																						
Total accrual	0	0	0	0																		

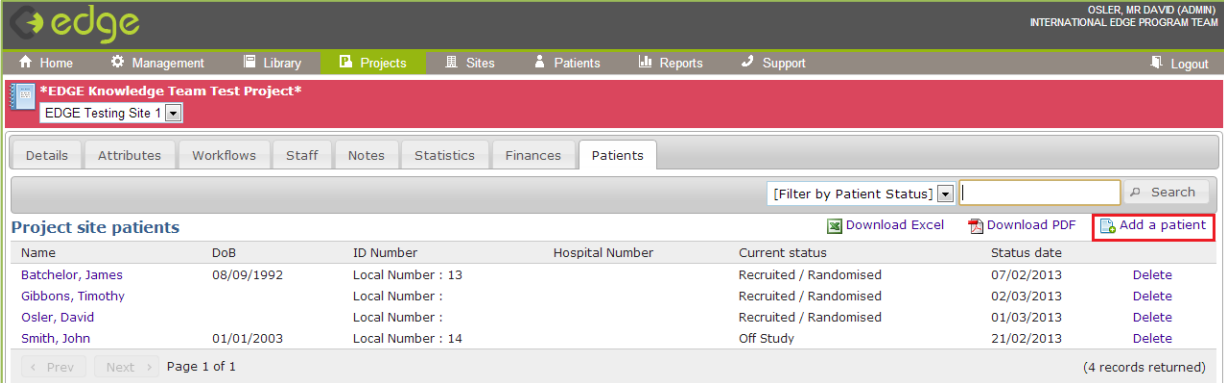
Details	Attributes	Workflows	Staff	Notes	Statistics	Finances	Patients				
Total accrual	For the period: 2012/2013 Group by milestone dates: <input type="checkbox"/> Show only my organisation:										
Annual accrual	Annual Accrual Download Excel Download PDF										
Current status											
	Month	Pre-Screened	Approached	Consented	Screened	Recruited / Randomised	On treatment	On follow-up	Completed	Rejected	Withdrawn
	April 2012										
	May 2012										
	June 2012										
	July 2012										
	August 2012										
	September 2012										
	October 2012										
	November 2012										
	December 2012										
	January 2013										
	February 2013										
	March 2013										
		0	0	0	0	0	0	0	0	0	0

Details	Attributes	Workflows	Staff	Notes	Statistics	Finances	Patients																																								
Total accrual	<div>Group by milestone dates: <input type="checkbox"/></div>						<div>Show only my organisation:</div>																																								
Annual accrual	<div>Current Patient Status Overview</div>						<div> Download Excel</div> <div> Download PDF</div>																																								
Current status	<table><tr><th>Site</th><th>Pre-Screened</th><th>Approached</th><th>Consented</th><th>Screened</th><th>Recruited / Randomised</th><th>On treatment</th><th>On follow-up</th><th>Completed</th><th>Rejected</th><th>Withdrawn</th><th>Total Patient</th></tr><tr><td>North Bristol NHS Trust</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>0</td></tr><tr><td></td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td><td>0</td></tr></table>											Site	Pre-Screened	Approached	Consented	Screened	Recruited / Randomised	On treatment	On follow-up	Completed	Rejected	Withdrawn	Total Patient	North Bristol NHS Trust											0		0	0	0	0	0	0	0	0	0	0	0
Site	Pre-Screened	Approached	Consented	Screened	Recruited / Randomised	On treatment	On follow-up	Completed	Rejected	Withdrawn	Total Patient																																				
North Bristol NHS Trust											0																																				
	0	0	0	0	0	0	0	0	0	0	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

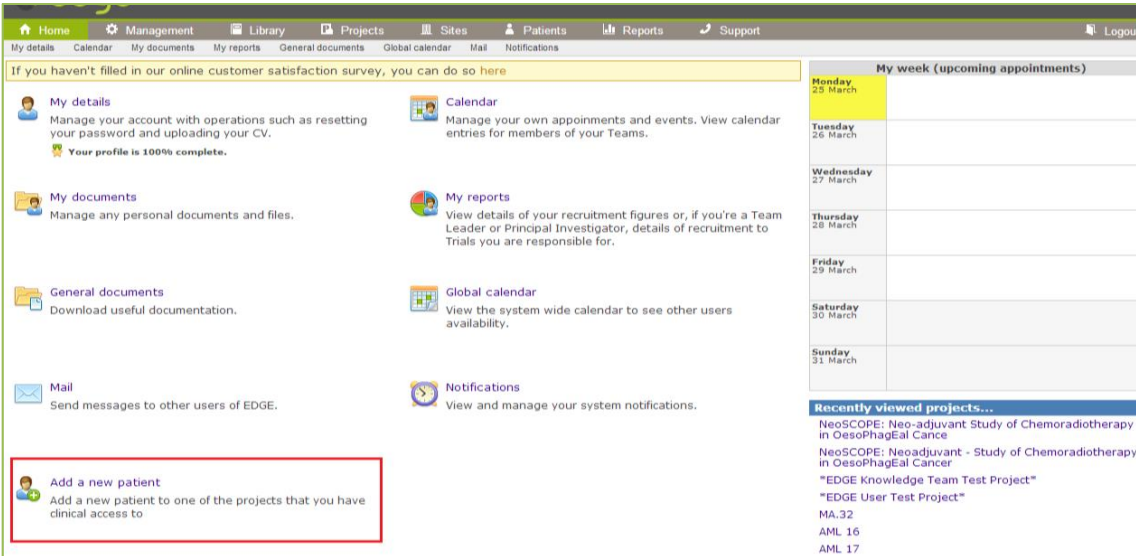


The screenshot shows the EDGE web application interface. At the top, there's a navigation bar with links: Home, Management, Library, Projects, Sites, Patients, Reports, Support, and Logout. Below this, a red banner displays '*EDGE Knowledge Team Test Project*' and 'EDGE Testing Site 1'. A secondary navigation bar includes tabs: Details, Attributes, Workflows, Staff, Notes, Statistics, Finances, and Patients. The 'Patients' tab is active, showing a table of 'Project site patients'. Above the table is a search bar with a dropdown for 'Filter by Patient Status' and a search button. To the right of the table are links for 'Download Excel', 'Download PDF', and 'Add a patient' (highlighted with a red box). The table lists patients: Batchelor, James; Gibbons, Timothy; Osler, David; and Smith, John, with columns for Name, DoB, ID Number, Hospital Number, Current status, Status date, and a 'Delete' link. At the bottom, it says 'Page 1 of 1' and '(4 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
Gibbons, Timothy		Local Number :		Recruited / Randomised	02/03/2013	Delete
Osler, David		Local Number :		Recruited / Randomised	01/03/2013	Delete
Smith, John	01/01/2003	Local Number : 14		Off Study	21/02/2013	Delete

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

HOME > ADD A PATIENT

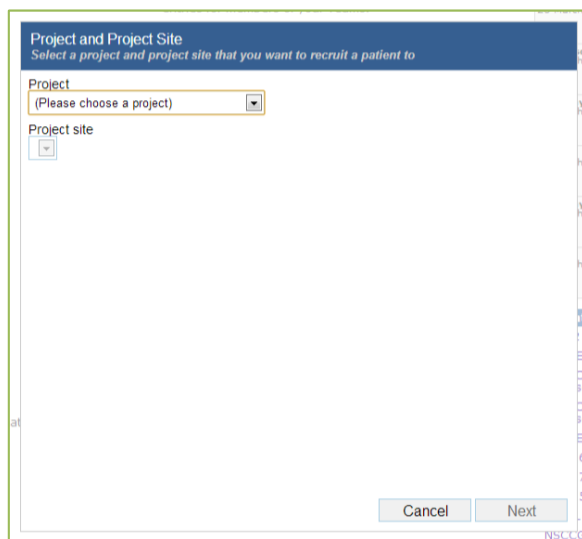


The screenshot shows the EDGE home screen. At the top, there's a navigation bar with links: Home, Management, Library, Projects, Sites, Patients, Reports, Support, and Logout. Below this, a yellow banner says 'If you haven't filled in our online customer satisfaction survey, you can do so here'. The main area is divided into two columns. The left column contains links: 'My details' (Manage your account with operations such as resetting your password and uploading your CV. Your profile is 100% complete.), 'My documents' (Manage any personal documents and files.), 'General documents' (Download useful documentation.), 'Mail' (Send messages to other users of EDGE.), and 'Add a new patient' (Add a new patient to one of the projects that you have clinical access to - highlighted with a red box). The right column contains links: 'Calendar' (Manage your own appointments and events. View calendar entries for members of your Teams.), '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.), 'Global calendar' (View the system wide calendar to see other users availability.), 'Notifications' (View and manage your system notifications.), 'My week (upcoming appointments)' (a calendar view for the week of 25 March to 31 March), and 'Recently viewed projects...' (listing NeoSCOPE: Neo-adjuvant Study of Chemoradiotherapy in OesophagEal Cance, NeoSCOPE: Neoadjuvant - Study of Chemoradiotherapy in OesophagEal Cancer, *EDGE Knowledge Team Test Project*, *EDGE User Test Project*, MA.32, AML 16, and AML 17).

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**.

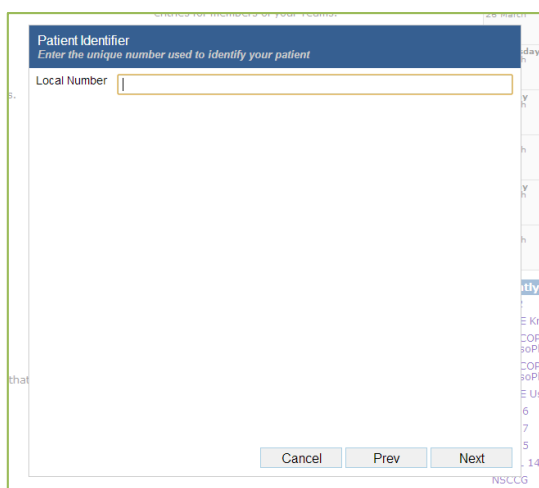


Note:

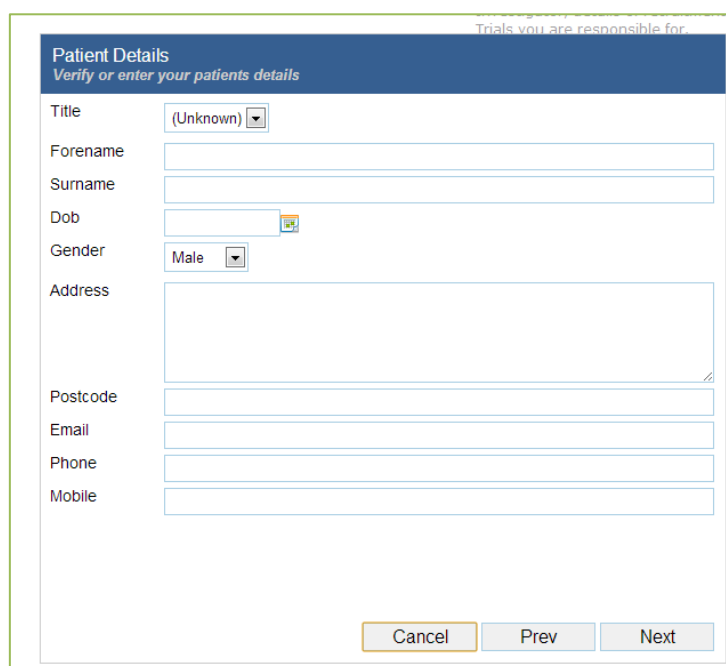
If you are unable to find your project or project recruitment site, please contact your Local EDGE Administrator and request clinical access at the Project Site level.

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.



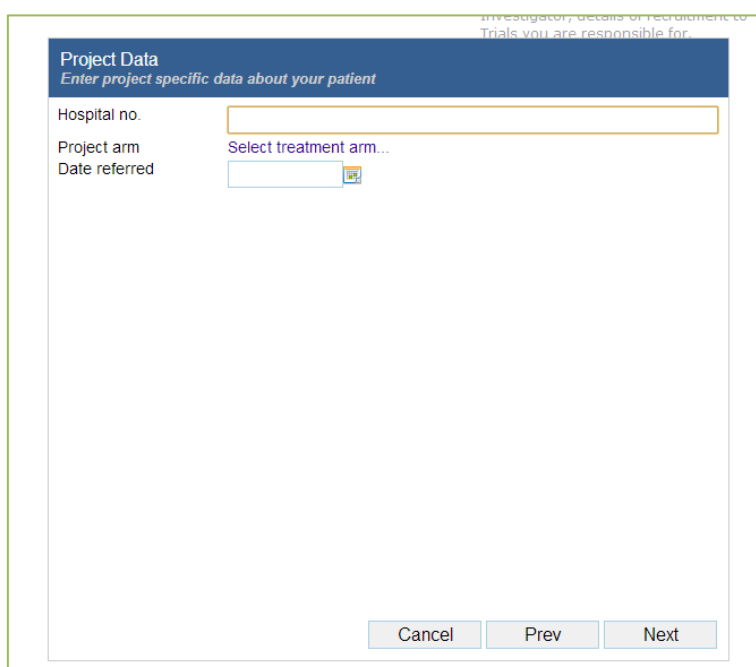
After clicking **NEXT** you will be asked to enter the patient's demographic information. Please note that Title, Forename and Surname are mandatory fields whilst DOB, Gender, Address, Postcode, Email, Phone and Mobile are optional.



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 (a dropdown menu currently showing "(Unknown)"), Forename (a text input field), Surname (a text input field), Dob (a date picker), Gender (a dropdown menu currently showing "Male"), Address (a large text area), Postcode (a text input field), Email (a text input field), Phone (a text input field), and Mobile (a text input field). At the bottom right of the form 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. (a text input field), Project arm (a dropdown menu showing "Select treatment arm..."), and Date referred (a date picker). At the bottom right of the form 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		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

☐ 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.

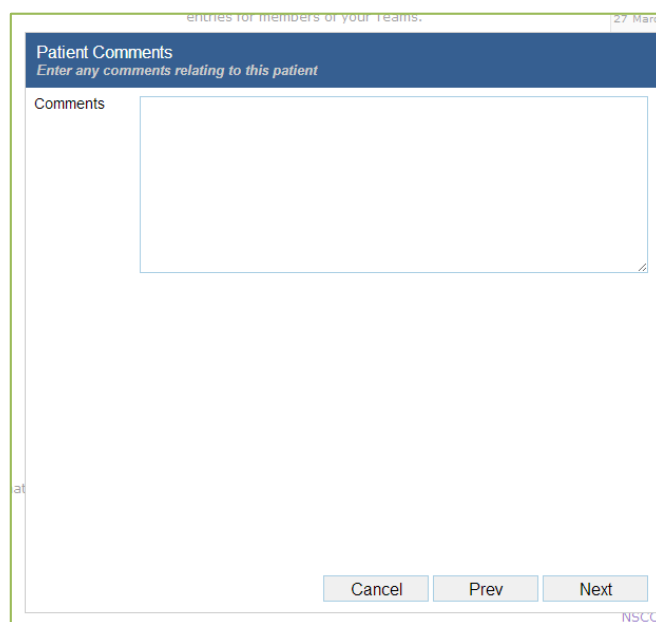
If you are completing this on behalf of another member of staff then select their name in the drop down box to reference this activity against them. If you are trying to reference another user in the drop down box but their name is not available, contact your Local EDGE Administrator so that they can 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.

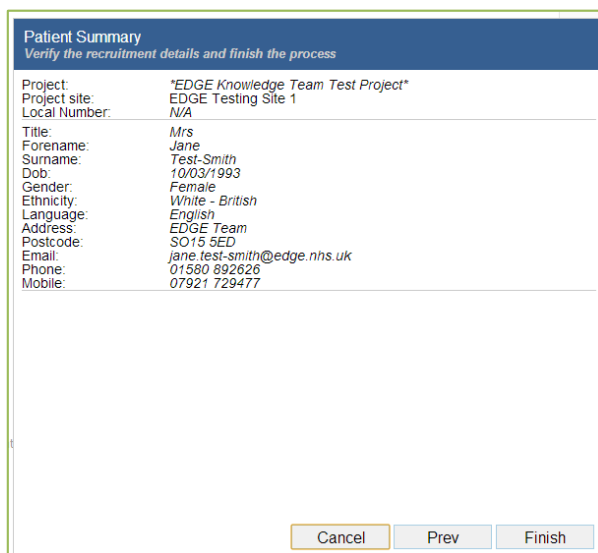
After clicking **NEXT** you will have the option to add some free text comments to record against the patient record.



The screenshot shows a web form titled "Patient Comments" with the subtitle "Enter any comments relating to this patient". Below the title is a large text area labeled "Comments". At the bottom of the form are three buttons: "Cancel", "Prev", and "Next". The form is part of a larger application window with a title bar that says "entries for members of your teams." and a date "27 March".

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**.



The screenshot shows a web form titled "Patient Summary" with the subtitle "Verify the recruitment details and finish the process". Below the title is a table of patient details:

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 892626
Mobile:	07921 729477

At the bottom of the form are three buttons: "Cancel", "Prev", and "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.

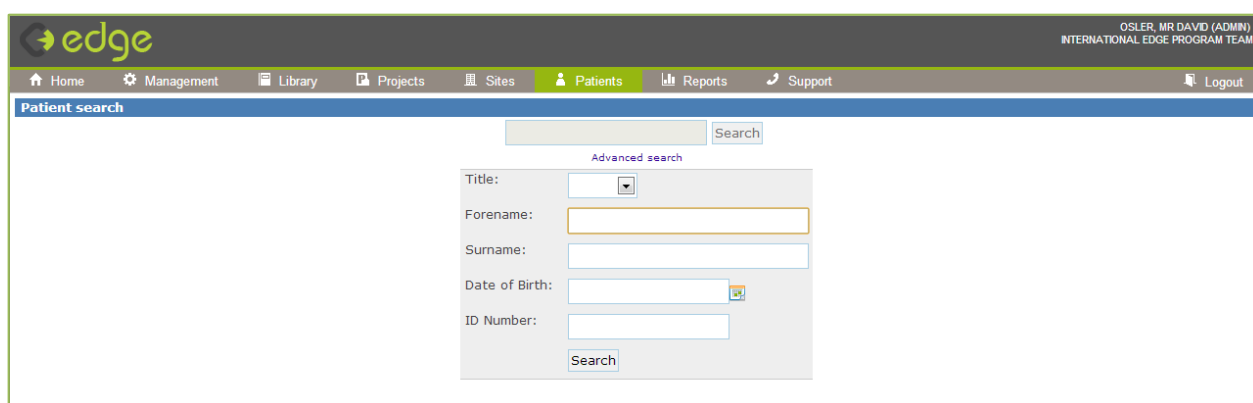
Finding Patients

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 shows the EDGE system's 'Patient search' interface. At the top, there is a navigation bar with the 'edge' logo on the left and the user 'OSLER, MR DAVID (ADMIN)' and 'INTERNATIONAL EDGE PROGRAM TEAM' on the right. Below the navigation bar, there is a menu with tabs: Home, Management, Library, Projects, Sites, Patients (highlighted), Reports, and Support. A 'Logout' link is also present. The main content area is titled 'Patient search' and contains a search form. The form has a 'Search' button at the top right. Below it, there is an 'Advanced search' section with fields for 'Title:' (a dropdown menu), 'Forename:', 'Surname:', 'Date of Birth:' (with a calendar icon), and 'ID Number:'. A 'Search' button is located at the bottom of this section.

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.

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.

Patient Details		Patient Status		
Field	Value	Status	Date	By
Randomisation Number:		Pre-Screened	04/03/2013	Osler, Mr David
Hospital Number:		Approached	05/03/2013	Osler, Mr David
Consultant:	Batchelor, Mr James	Consented	07/03/2013	Osler, Mr David
Project Arm:	Arm 1 - Drug 1	Screened	12/03/2013	Osler, Mr David
Referring site:	The Clatterbridge Cancer Centre NHS Foundation Trust	Recruited / Randomised	12/03/2013	Osler, Mr David
Date referred:	19/03/2013			

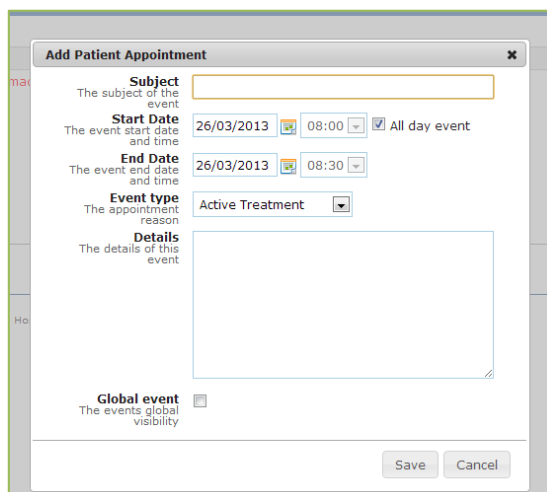
Patient Appointments

[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 several fields and a checkbox:

- Subject:** A text input field with the placeholder text "The subject of the event".
- Start Date:** A date and time selector showing "26/03/2013" and "08:00". It includes a calendar icon and a dropdown for time. A checkbox labeled "All day event" is checked.
- End Date:** A date and time selector showing "26/03/2013" and "08:30". It includes a calendar icon and a dropdown for time.
- Event type:** A dropdown menu with "Active Treatment" selected. The placeholder text is "The appointment reason".
- Details:** A large text area for comments with the placeholder text "The details of this event".
- Global event:** A checkbox labeled "The events global visibility". It is currently unchecked.
- Buttons:** "Save" and "Cancel" buttons are located at the bottom right of the form.

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.

Edit patient identifying details

Title
The patient's title: Mr

Forename
The first name: Jane

Surname
The last name: Test-Smith

Date of Birth
The date the patient was born: 10/03/1993

Gender
The patient's sex: ☐ Not known ☐ Male ☒ Female ☐ Not specified

Ethnicity
The patient's ethnicity: White - British

Language
The patient's first language: English

Deceased
Has the patient died? ☒

Date of death
The date the patient died:

Cause of death
The cause of death:

Save Cancel

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.

My Calendar

HOME SCREEN > MY CALENDAR

The calendar allows you to manage your study appointments within EDGE. To add an entry, click **ADD EVENT** and type the title, start and end time (you can select 'all day event' if necessary), category, location, any extra details and recurrence type.

The screenshot shows the 'Add Calendar Event' dialog box overlaid on a calendar view for November 2012. The dialog box contains the following fields and options:

- Subject:** Diabetes EDGE Training
- Start date:** 26/11/2012, 08:00
- End date:** 26/11/2012, 08:30
- Category:** Training
- Location:** Diabetes, Monks Park House
- Details:** Attendees: Sharon Tovey, Pippa Lamb, Stacey McGarry
- Recurrence Type:** None
- Global entry:** ☐ (Display event in the global calendar)

Buttons at the bottom right: Save, Cancel.

If the information is applicable to other users, tick the **GLOBAL EVENT** box to make it visible to other users of the project in the **GLOBAL CALENDAR**. Other users may also send information to your calendar by using the global event function. You will be informed of this in your **NOTIFICATIONS** tab when you log in to EDGE.

If you are part of a team on EDGE, you will be able to see the personal diary entries of those who are in your team. If you want to view these entries, tick the box with the team name on or tick the specific user out the team whose calendar you want to view.

The screenshot shows the 'User Calendar' view for March 2013. The interface includes a navigation bar at the top with tabs: Home, Management, Library, Projects, Sites, Patients, Reports, Support, and Logout. Below the navigation bar, there are links for 'My details', 'Calendar', 'My documents', 'My reports', 'General documents', 'Global calendar', 'Mail', and 'Notifications'. The main calendar view shows a grid for March 2013, with days of the week (Sun to Sat) and dates (1 to 31). A filter sidebar on the left shows 'Me' checked and 'Delivery' unchecked, with a list of users: Lewis, Helen; McGarry, Stacey; User, Import; and Williams, Kate. The calendar displays two events: 'Annual Leave' (a green bar spanning from Monday, March 24th to Friday, March 28th) and '09:00 - 10:30 EDGE Training with Annette' (a yellow bar on Thursday, March 27th).

Global Calendar

HOME SCREEN > GLOBAL CALENDAR

The Global Calendar allows users to keep track of Trust-wide appointments (e.g. training and reporting deadlines). This calendar is linked to the **MY CALENDAR** section which manages personal schedule entries. The **GLOBAL CALENDAR** is populated by checking the **GLOBAL EVENTS** box when adding an entry in **MY CALENDAR**.

To view the entrant of a global appointment, click **SHOW OWNER**. Each calendar entry will produce, below its title, the user who has added that entry.

<div>Home Management Library Projects Patients Reports Support Logout</div> <div>My details My diary My documents My reports My qualifications General documents Global diary Mail Notifications</div>						
Global Diary						
Day Week Month						
15/03/2012 Today Show owner						
March 2012						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
27	28	29	1 annual leave	2 annual leave	3	4
5 day off 14:00 Half Day Leave 16:30	6	7	8 12:30 Annual leave 16:30	9	10	11
12 Annual Leave	13 annual leave	14 annual leave	15 Edge User Training - St Helens & Knowsley 09:00 annual leave 13:00 13:00 Annual leave 16:30	16 12:30 Annual Leave 17:00	17	18
19	20	21 12:30 Edge User Training - Halton 17:00	22 Mandatory Training (Information Governance) Annual leave	23 Edge User Training - S&O	24	25
26 Annual leave ANNUAL LEAVE	27 Annual leave	28 Annual leave 11:00 Edge Overview - Lancashire & South Cumbria Network 17:00	29 Annual leave	30 Annual Leave	31 Annual Leave	1

Reports - Recruitment

HOME SCREEN > MY REPORTS > MY RECRUITMENT

This feature is available to all users but results will only be displayed for users with Clinical Access at a Project Site

My Reports > My Recruitment allows individual users to report on their activity across a range of projects over a monthly basis looking at patients screened, rejected, recruited and withdrawn.

This can form part of a user's personal as well as their department's performance statistics. The report can be downloaded to an **Excel** spread sheet or **PDF**.

Date	Project	Site	Screened	Recruited	Rejected	Withdrawn
05/02/2013	Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust	1			
06/02/2013	Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust	1			
01/04/2013	Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust		1		
02/04/2013	Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust	1	1		
02/05/2013	Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust	1			
04/05/2013	Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust		1		
06/05/2013	Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust		1		
02/07/2013	Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust				1
TOTALS			4	4	0	1

HOME SCREEN > MY REPORTS > MY PROJECTS ACCRUAL

This feature is limited to Users assigned as a Principal Investigator at Site Level

A Principal Investigator (PI) using EDGE will be able to monitor their own monthly recruitment figures across all projects and sites through the **MY PROJECT ACCRUAL** function. This report provides project recruitment information at all project sites within the organisation, in real time.

My recruitment	Shared reports	My projects accrual (P.I.)
View a monthly report of your recruitment activity.	View bespoke reports that have been shared with you.	As a Principal Investigator, you can view accrual activity to all of your projects.

Project	Site	Screened	Recruited	Rejected	Withdrawn
Edge Test Study	Sheffield Teaching Hospitals NHS Foundation Trust	4	4	0	1

HOME SCREEN > MY REPORTS > MY TEAMS RECRUITMENT

This feature is limited to assigned Team Managers

You can produce staff recruitment reports for all studies you are assigned to as a Team Manager. These reports can be filtered and sorted to reflect recruitment by projects, teams, sites or individual members of staff. Each of these reports can be downloaded into **Excel** for further sorting or into **PDF** format for distribution.

Please note that if you wish to include a Team Leader's recruitment figures into the report, they must be added as a Team Member also. Being a Team Leader will allow them to run the report but will not automatically include their own recruitment into it.

HOME SCREEN > MY REPORTS > SHARED REPORTS

This feature is accessible by all EDGE users

Shared reports are a function controlled by your EDGE local Administrators. Reports are predefined by Local Administrator and shared with individual users, teams, groups of teams or an entire organisation.

To run a shared report, click **MY REPORTS** on your home screen and select **SHARED REPORTS**; from the drop down select the report you would like to run and click **SUBMIT QUERY**. This will generate a list of results based on the criteria defined by your EDGE Local Administrator.

The results can be exported to **PDF** for printing and distribution or **Excel** for filtering or refining.

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 handbook.

Appendix 1 - Definitions of terms used at **site level**, on the Details tab

Name	Description
Recruitment end date (Planned)	The date that recruitment is planned to end at a specific site
Recruitment end date (Actual)	The date that recruitment has actually stopped at a specific project site
Closed date	The date the project site closes
Recruitment (My Org) First patient recruited	The date the first patient was recruited on to a project by STH
Recruitment (Any Org) First patient recruited	The date the first patient was recruited onto a project by any Trust
Recruitment (My Org) Actual recruitment	The % recruitment that has taken place within STH
Recruitment (Any Org) Actual recruitment	The % recruitment that has taken place within any Trust
Recruitment (Any Org) Recruitment clock (days)	The number of days that have elapsed between the NHS permission date and the first patient being recruited at any Trust.
Recruitment (My Org) Recruitment clock (days)	The number of days that have elapsed between the NHS permission date and the first patient being recruited at a specific site by STH .