

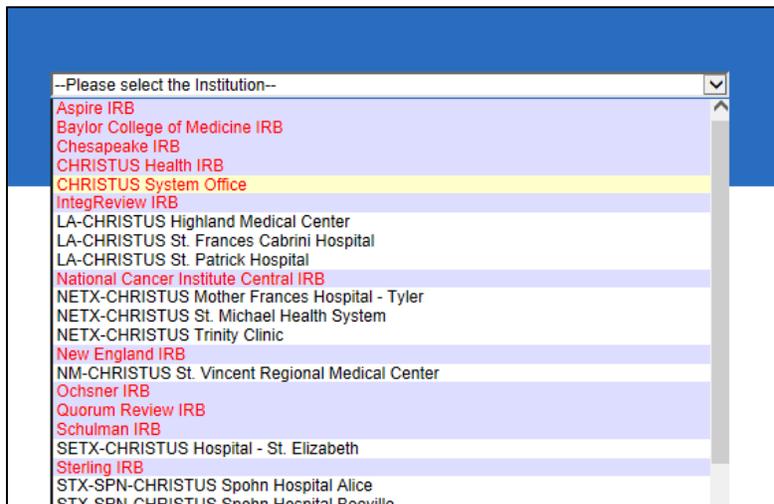
How to Complete Patient Events in CREDIT

These instructions show users how to check off patient events in the Patient File Cabinet in CREDIT. These instructions are only necessary if financial information needs to be captured per patient on a study.

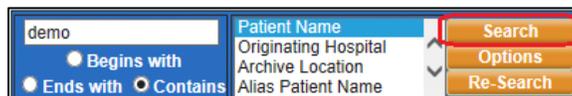
Step 1: From the [CREDIT homepage](#), select **Patient File Cabinet**.



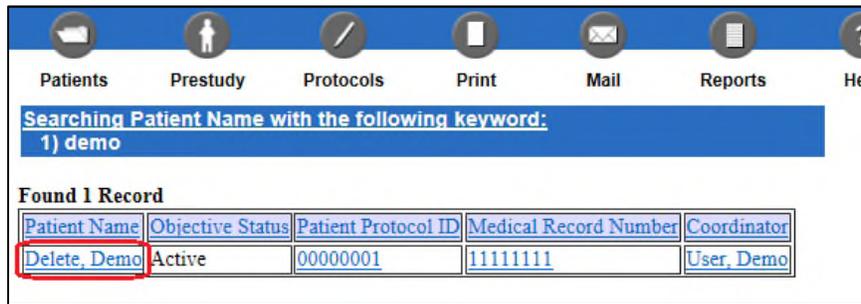
Step 2: Select the institution that the patient was screened at. You can technically select any institution since you are searching for a patient and not registering a new patient, but it is good practice to do the former.



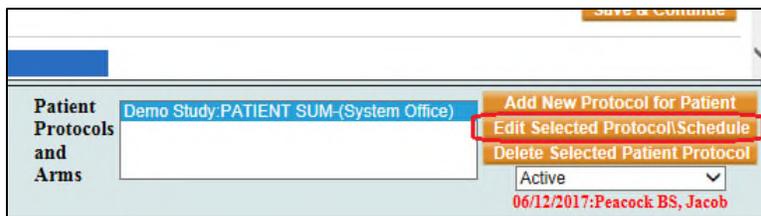
Step 3: In the bottom right search for the patient. In this example the patient's name is 'Demo Delete'.



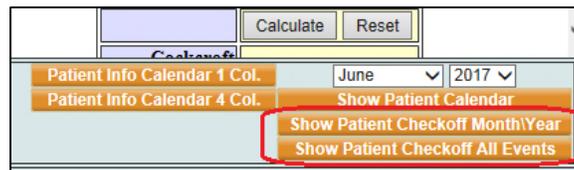
Step 4: Click on the patient name to open their demographic page.



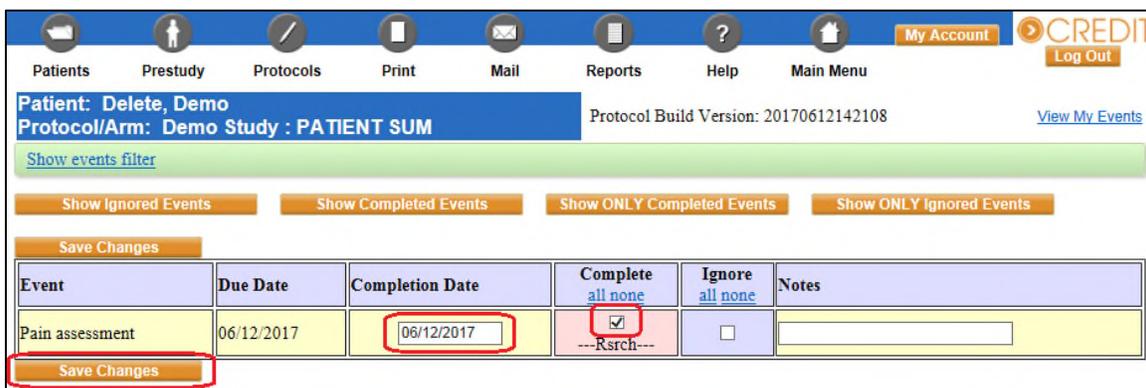
Step 5: In the bottom right, click on the arm the event is a part of and then click **Edit Selected Protocol/Schedule**.



Step 6: Again in the bottom right of the screen, click **Show Patient Checkoff Month/Year** or **Show Patient Checkoff All Events**, depending on your needs at the time. The former will show patient events for the month/year selected in the drop down above it. The latter will show all patient events



Step 7: Now you can check off events by filling in the completion date, checking the box, and clicking **Save Changes**.



Step 8: You can now choose to email staff if you wish by adding their names to the list. You can also edit the email below if necessary. At the bottom of the page, complete the event checkoff by clicking **Continue**.

Note: The events will not be officially checked off/completed until you click **Continue**, so you can return to the event checkoff page if necessary for any changes.

Patients Prestudy Protocols Print Mail Reports Help Main Menu My Account CRED Log Out

[Return to Check-off Page](#)

Send Message Do NOT Send Message

Continue

Notify Staff

Select staff and groups from this list:

Groups
All Staff
Adorboe, Andrew
Babin, Laura
Bartell, Ellen
Beebe, Deirdre
Brunet, Mike
Burke, Stephen W

Notifications will be sent to these staff and groups:

Add >>
<< Remove

Send via: External Email Internal CREDIT Mail

Message Subject: Billing Compliance: [Demo Study:PATIENT SUM] Patient events have been modified

{{VALUE_xx}} in the message body denotes a value is masked here and will be replaced with the actual value when the message is sent.

format font size B I U A X X Decimal numbers

Patient: Delete, Demo
Patient Protocol ID: 00000001

Patient Initials: DD
Date of Birth: 04/22/1964
On Study Date: 06/12/2017
Medical Record No: 11111111

Protocol: Demo Study:PATIENT SUM,
Sponsor: No sponsor
Cost Center: {{VALUE_1}}
Local IRB #: Demo Study
Principal Investigator:

Staff Making Changes: User, Demo

Event ID	Existing				Saved				Billing	
	Complete	Complete Date	Ignored	Billing Compliance	Complete	Complete Date	Ignored	Billing Compliance	Billing	Notes
Path:										

Continue

For technical questions related to CREDIT please call: 469.282.2014
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