1. **Gaining access**

   New user:

Step 1: Email CRU@mssm.edu with the following information:

- Name
- Username
- Department
- Work phone number
- The GCOs for which you need access to schedule patients

   Existing user:

Step 1: Email CRU@mssm.edu with the following information:

- Username
- The GCOs for which you need access to schedule patients

2. How to Submit a 'CRU

   Visit Request'Access

   a 'Study Screen'

Step 1: Log in to eRAP (https://erap.mssm.edu/). On the Homepage select 'Mount Sinai Operations' module icon.

Step 2: Select "CRU Visit Requests" in the 'Project' dropdown. Depending on your access, "CRU VisitRequests" project may be your default setting

Step 3: On the 'Entry Screen', the 'Study Search Results' grid provides the list of the studies you can request visits for along with the 'Study ID' access link.

Study ID	GCO #	PI	Coordinator Name	Coordinator Email	Coordinator Name	Coordinator Email	
234937	11-3333	PI3 Name	Coordinator 1	Coordinator @mssm.edu	Coord3	Coord3@mssm.edu	
234892	11-1111	PI1 Name	Coordinator 1	Coordinator @mssm.edu	Coord2	Coord2@mssm.edu	

Previous Page
Record count: 2

Please note, the 'Custom Search' section can be used further to search for previously submitted visits' requests records. (The detailed description of the 'Custom Search' fields is provided below in the 'View or Cancel an existing Visit Request' section of the help instructions.)

Click on the 'Study ID' link to access the 'Study Screen'.

Study Search Results

Study ID	GCO #	PI	Coordinator Name	Coordinator Email	Coordinator Name	Coordinator Email	
234937	11-3333	PI3 Name	Coordinator 1	Coordinator @mssm.edu	Coord3	Coord3@mssm.edu	
234892	11-1111	PI1 Name	Coordinator 1	Coordinator @mssm.edu	Coord2	Coord2@mssm.edu	

Step 4: On the 'Study Screen', the 'Study Information' section populates the Study identifiers along with contact information for the study team. The 'Visit Request' grid provides the access links along with identifiers for all of the visits which were requested for the study.

Place a NEW 'Visit Request'

Step 1: Click 'Add New Visit Request' button.

Visit Request

Add New Visit Request

Visit Request ID	Date of Visit (preferred)	Patient Last Name	Patient First Name	Patient DOB	Meal/Snack Request	Request Date	Request Status	
49	12/12/2014	testpatnt	testpt	10/10/2002	No	12/2/2014	Confirmed	
48	12/15/2014	testpatient	testpt	10/10/2002	Yes	12/2/2014	Cancelled	

Step 2: On the 'Visit Screen', the 'Request Status' section provides the request information once it is submitted.

Note: You do not need to complete this section.

The 'Patient Information' and 'Visit Information' sections, as well as the 'Dietary Needs' section (if applicable) must be filed out.

Visit Information

Date of Visit (preferred) [   ] 📅   Time of Visit (preferred) [   ]

Date of Visit (alternative 1) [   ] 📅   Time of Visit (alternative 1) [   ]

Date of Visit (alternative 2) [   ] 📅   Time of Visit (alternative 2) [   ]

Length of Visit (min) [   ]

Visit Type (Check ALL that apply)
- ☐ Allergy/Immunology
- ☐ Pharmacokinetics
- ☐ Photoprovocation
- ☐ Physical Exam
- ☐ Scatterbed
- ☐ Space only
- ☐ Specimen processing
- ☐ Specimen sampling
- ☐ Study Drug Administration
- ☐ Tanner Staging
- ☐ Vital signs
- ☐ Biopsy
- ☐ Dietary Consult
- ☐ ECG
- ☐ History/Physical
- ☐ Infant feeding
- ☐ IV placement
- ☐ Lumbar puncture
- ☐ Oral glucose tolerance test

Visit Number/Day (if applicable) [   ]

Visit Comments [   ]

Meal/Snack Request [Yes   ▾]

Dietary Needs

Dietary Specific Requirements [Normal diet   ▾]   Dietary Special Requests/Comments [   ]

The 'Notes' section provides reminder for submitting.

Notes:

Review the Patient and Visit Information before Submitting this Request.

Press 'Save' to Submit this Request.

The Information cannot be changed for a Submitted Request.

Step 3: Please review information in all sections and click on the 'Save' button to submit the visit request.

Entry Screens Project: [CRU Visit Requests   ▾]

[Save]   [Full View]   [Print View]   [?]

Visit Request Information For Study

Please note: The Information **cannot be** changed for a Submitted Request.

Step 4: Once the visit request is submitted, its status (in the 'Request Status' section) will be changed accordingly, and a corresponding email will be sent to 'Schedule-CRC'.

You will receive a notification email with the information regarding the submission of the request.

Step 5: Once the Visit is scheduled and confirmed by CRU, the 'Request Status' information will be updated to "Confirmed" , and you will receive a final confirmation email.

Note: If the Visit cannot be scheduled, its status will be changed to '**Not Confirmed**', and you will receive a notification email with the 'Schedule-CRC'' notes and recommendations. You will need to place a NEW Visit Request.

View or Cancel an existing 'Visit Request'

View an existing 'Visit Request'

Step 1: On the 'Entry Screen', the 'Custom Search' section provides fields to search for the particular visits' requests records which were previously submitted for the study. The visits' records can be quickly looked up by either one of the criteria: 'Visit Request ID', 'Request Status', Patient Last Name', and 'Patient MRN'.

The search result will provide the 'Visit Request Search Results' grid with the list of all study's visits matching to the specified criteria.

Note: To retrieve the list of ALL study's visits, click on the 'Study ID' link in the 'Study Search Results' grid to access the 'Study Screen'.

Step 2: Click on the 'Visit Request ID' link in the 'Visit Request' grid to view an existing 'Visit Request' record on the 'Visit Screen'.

Visit Request

Add New Visit Request

Visit Request ID	Date of Visit (preferred)	Patient Last Name	Patient First Name	Patient DOB	Meal/Snack Request	Request Date	Request Status	
49	12/12/2014	testpatnt	testpt	10/10/2002	No	12/2/2014	Confirmed	
48	12/15/2014	testpatient	testpt	10/10/2002	Yes	12/2/2014	Cancelled	

The existing 'Visit Request' information cannot be changed.

Entry Screens **Project:** CRU Visit Requests ▼

Save   Compact View   Print View   🔒 [?]

Visit Request Information For Study

Field legend

* - marks fields that are not required but important to fill out.
* - marks fields that are required to save the form.

Visit Request Information

Visit Request ID 48   Entry Date 12/2/2014

Study ID 234692   Last Update 12/2/2014   Last User demo

Request Status

Request Date 12/2/2014   Request Status Cancelled ▼

Confirmed Visit Day 12/17/2014   Confirmed Visit Time 1pm

CRU-Schedule Note

Patient Information

Patient previously seen at MSH Yes ▼

Patient Last Name testpatient   Patient First Name testpt

Patient DOB 10/10/2002   Patient MRN 1222222

Visit Information

Date of Visit (preferred) 12/15/2014   Time of Visit (preferred) 1pm
Date of Visit (alternative 1) 12/17/2014   Time of Visit (alternative 1) 1pm
Date of Visit (alternative 2) 12/18/2014   Time of Visit (alternative 2) 1pm

Length of Visit (min) 60

Visit Type (Check ALL that apply)
☑ Physical Exam
☑ Oral glucose tolerance test
☐ Allergy/Immunology
☐ Pharmacokinetics
☐ Photoprovocation
☐ Scatterbed
☐ Space only

Please note: If for ANY reason the Visit Request has to be changed: the existing request has to be canceled, and a new request has to be placed.

Cancel a submitted/confirmed 'Visit Request'

Step 3: Click on the 'Visit Request ID' link at the 'Visit Request' grid to access the 'Visit Screen'. Scroll down to the 'Visit Cancelation' section. Select "Yes" in 'Cancel Visit' dropdown and provide a 'Cancelation Reason'.

Click on the 'Save' button to submit the visit cancelation.

Step 4: Once the visit cancelation is submitted, the corresponding email will be sent to 'CRU-Schedule'. As soon as the Visit is canceled, the 'Request Status' information will be updated, and you will receive a confirmation email regarding the cancelation of the request.