

## Step I: Log into Velos

1. Type this link in your web browser: **https://velos.swmed.edu**

### Important Info & Tips

2. Type your login ID in the **Username** field and password in the **Password** field.
3. Click on **Login**.
4. To logout, click on the **Logout** button on the far right.

- You must enter your Username in all lowercase letters, but your password as you would normally enter it.
- Your username and password will be the same that you use for logging into your email.

For assistance, contact the IR Service Desk at **214-648-7600**, or [SERVICEDESK@utsouthwestern.edu](mailto:SERVICEDESK@utsouthwestern.edu).

**eLearning:** <http://www.utsouthwestern.edu/about-us/administrative-offices/information-resources/academic-information-systems/systems/velos.html>

5/8/2019



## Step 2: Search for a Study

1. Enter the Velos **Study Number** in the **Search a Study** field.
2. Click on **Search**.

Personalize | Manage | Libraries | Reporting | Study #, Title or Keyword | Development | Sheila Palos

Current Page: Velos eResearch >> Homepage

Search a Study: 13623 | Search | Advanced Search | Account Forms

Last Modified Studies

Quick Access	Study Number	Study Title	Study Status
	16345	Measuring the efficacy of lateral tarsal	<a href="#">IRB - Continuing Review Approved</a>

3. Click on (Study Administration) button to pull up study summary.

Personalize | Manage | Libraries | Reporting | Study #, Title or Keyword | Development | Sheila Palos

Current Page: Velos eResearch >> Homepage

Search a Study: 13623 | Search | Advanced Search | Account Forms

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## Step 3: Complete Coverage Analysis Modification Form

1. Click on **Forms**.

Personalize | Manage | Libraries | Reporting | Study #, Title or Keyword | Development | Sheila Palos

Current Page: Study >> Summary

You are working on study: 13623

Summary | Site/Team | Protocol | Study Status | Forms | Milestones | Admin Schedule | Documents | Reports | Notifications

Study Initiation

- IRB - Submis...
- IRB - Waitin...
- IRB - Approved

Study Activation

- Study - Acti...

Study Summary

Study Information

Study Entered By \* Ashley Negaard [Select User](#)

Principal Investigator ? Pamela Okada [Select User](#)

Primary Research Coordinator ? Ashley Negaard [Select User](#)

IND/IDE Information Available?

Principal Investigator was a major author/initiator of this study?

CTRP Reportable ?

FDA Regulated Study ?

2. Select **Coverage Analysis Modification Form** from the drop down list.
  - a) Click on **Go**.

The screenshot shows the 'Study Forms' interface. At the top, there are navigation tabs: Personalize, Manage, Libraries, Reporting. A search bar contains 'Study #, Title or Keyword'. The user is logged in as 'Sheila Palos'. The current page is 'Study Forms' for study 13623. A breadcrumb trail shows: Summary, Site/Team, Protocol, Study Status, Forms, Milestones, Admin Schedule, Documents, Reports, Notifications. The 'Forms' tab is active. A 'Jump to Form:' dropdown menu is open, listing various forms. 'Coverage Analysis Modification Form' is highlighted in blue and circled in red. A red arrow points to the 'Go' button next to the dropdown.

- b) Click on **New**.

The screenshot shows the 'Form Response Browser' interface. The current page is 'Study >> Form Response Browser' for study 16345. The breadcrumb trail is: Summary, Site/Team, Protocol, Study Status, Forms, Milestones, Admin Schedule, Documents, Reports, Notifications. The 'Forms' tab is active. On the left, there is a 'Study Initiation' sidebar with a checklist: IRB - Submission... (checked), IRB - Waiting As... (checked), IRB - Approved (checked). The main area shows 'Form Name: Clinical Laboratory Services Modification Form' with a dropdown arrow and a 'New' button. A red arrow points to the 'New' button. Below, it says 'Previous entries for form: "Clinical Laboratory Services Modification Form"'. There is a 'Filter By Date' dropdown set to 'All' and a 'Search' button. The status is 'No Records Found'.

3. Complete the **Coverage Analysis Modification Form** (1 Form per Modification)

**NOTE:** Study staff should complete Section 1 of the form.

The screenshot shows the 'Coverage Analysis Modification Form' interface. The current page is 'Study Form' for study 16345. The breadcrumb trail is: Summary, Site/Team, Protocol, Study Status, Forms, Milestones, Admin Schedule, Documents, Reports, Notifications. The 'Forms' tab is active. The 'Jump to Form:' dropdown is set to 'Coverage Analysis Modification Form'. The 'Open Form Name:' is 'Coverage Analysis Modification Form'. A red arrow points to the text 'Section 1 (To be filled out by the study team)'. The form includes the following fields: 'Data Entry Date\*' (calendar icon), 'IRB Modification Number \*', 'Has Modification Gone to IRB? \*' (radio buttons for Yes/No), 'Does this affect the Budget and/or items and services?\*' (radio buttons for Yes/No), and a text area for 'What is the change to the budget and/or items and services?' with a help icon.

- a) Keep form status as **Work In Progress**.
- b) Enter **e- Signature**.
- c) Click on **Submit**.

The screenshot shows a horizontal form section. On the left, there is a dropdown menu labeled 'Form Status\*' with 'Work In Progress' selected. A red arrow points to this dropdown. In the center, there is a text input field labeled 'e-Signature \*' with a password icon (four dots). A red arrow points to this field. On the right, there is a dark grey button labeled 'Submit'. A red arrow points to this button.

## Step 4: Add a New Study Status

1. Click on the **Study Status** tab.
2. Click on **ADD NEW STATUS** link on the far right.

The screenshot shows a web application interface. At the top, there are navigation tabs: 'Personalize', 'Manage', 'Libraries', 'Reporting', and 'Development'. Below these, there is a search bar and a breadcrumb trail: 'You are working on study: 16345'. The main content area has several tabs: 'Summary', 'Site/Team', 'Protocol', 'Study Status', 'Forms', 'Milestones', 'Admin Schedule', 'Documents', 'Reports', and 'Notifications'. The 'Study Status' tab is selected. Below the tabs, there is a search section with a dropdown menu set to 'All' and a 'Search' button. To the right, there is a table with columns for 'Current Status', 'Study Start Date', and 'Study End Date'. Below this, there is a 'Study Status History' table with columns for 'Organization', 'Study Status', 'Status Valid From', 'Status Valid Until', 'Meeting Date', and 'Notes'. The 'ADD NEW STATUS' link is circled in red in the top right corner of the main content area.

3. Add a new **Coverage Analysis** Status,
  - a) **Organization**- select **UT Southwestern Medical Center and Affiliates**
  - b) **Status Type**- select **Coverage Analysis** from drop-down list
  - c) **Study Status**- select **Coverage Analysis - Modification Submitted** from drop-down list
  - d) **Documented By**- this field will auto populate
  - e) **Status Valid From**- enter the **current date**
4. Enter **e- Signature**.
5. Click on **Submit**.

Personalize | Manage | Libraries | Reporting |  Development Sheila

Current Page: Study >> Status Details

You are working on study: 16345

Summary | Site/Team | Protocol | **Study Status** | Forms | Milestones | Admin Schedule | Documents | Reports | Notifications

**Study Initiation**

- IRB - Submis...
- IRB - Waitin...
- IRB - Approved

**Study Activation**

- Study - Acti...

**Study Closure**

- IRB - Study ...

Study Start Date : \_\_\_\_\_ Study End Date : \_\_\_\_\_

Please enter status details:

Organization

Status Type

Study Status

Documented By \*  [Select User](#)

Assigned To  [Select User](#)

Status Valid From \*

Status Valid Until

Meeting Date

Notes

This is study's Current Status  
 Organization specific current reportable status

e-Signature \*