

## Q2. What is Velos and how do I navigate the system?

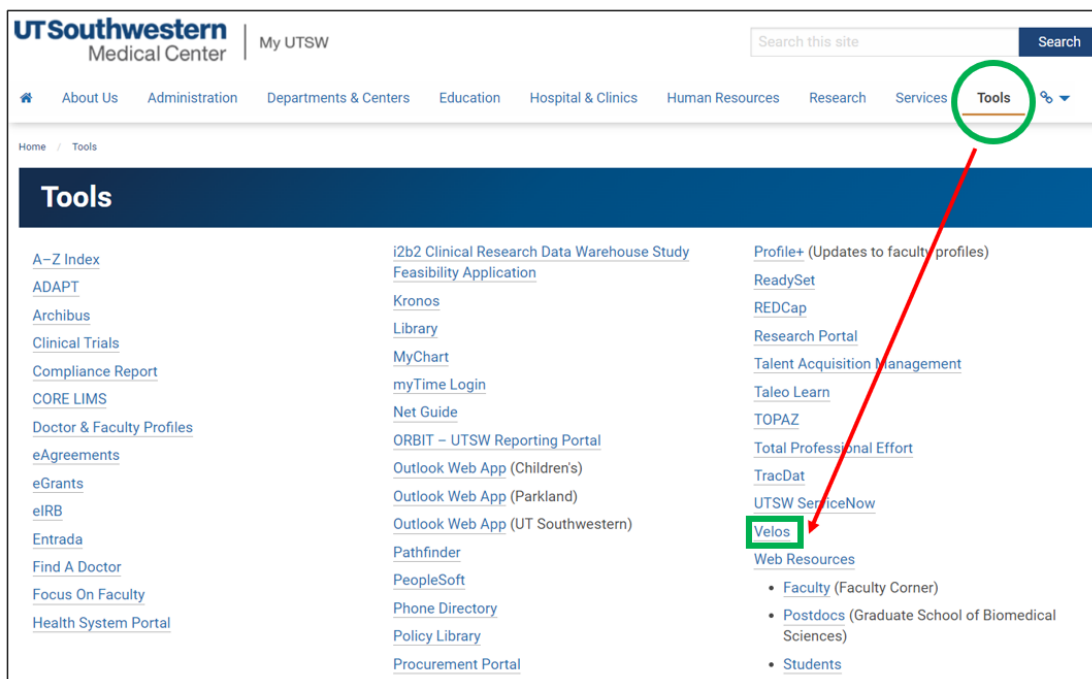
[Velos](#) is a clinical trial management system (CTMS) that allows users to initiate and track the progress of their clinical trial budget, coverage analysis, and documents.

First-time users are required to complete the [eResearch Access Request Form](#) to be granted access to systems such as Velos, eIRB, eGrants, eAgreements and Topaz. For information on which systems are connected and how they route to certain applications, please reference the [SPA Software and Web Applications Guide](#).

Training courses offered via [Taleo Learn](#) in collaboration with IRSE Training include:

- Velos and eIRB Study Registration
- Velos Patient Registration

To access **Velos**, go to the **Tools** page on the UTSW website. Select **Velos**:



Log in using your UTSW username (lowercase only) and password:



**Note:** Only use lowercase letters as username.

Typing capital letters will prevent login.

The Velos Homepage provides **Quick Links** to websites and guidance materials; for example, the Contracts and Agreements Pathfinder (CAP) for assistance with determining the contract type and which central office will assist with execution.

The screenshot shows the Velos homepage interface. At the top, there are navigation menus for 'Personalize', 'Manage', 'Libraries', and 'Reporting'. A search bar is present with the text 'Study #, Title or Keyword'. Below the navigation, there are two search options: 'Search A Study' and 'Advanced Search'. The main content area is divided into two sections: 'Last Modified Studies' and 'My Links'. The 'Last Modified Studies' section contains a table with columns for 'Quick Access', 'Study Number', 'Study Title', and 'Study Status'. The 'My Links' section contains a 'Quick Links' table with two columns: the first column lists various links, and the second column provides a brief description for each link. The 'Quick Links' table is highlighted with a green border.

Quick Access	Study Number	Study Title	Study Status
	10748	AREN03B2: Renal Tumors Classification, B	IRB - Continuing Review Approved
	33640	NRG-GY019: A Randomized Phase III, Two-A	IRB - Mod Approved
	43218	Identification of Trends in Physical Ass	Study - Study Created in PHHS Velos
	34123	The effects of low-dose analgesics on ca	IRB - Mod Approved
	41475	Prospective, single institutional study	Study - Active/Enrolling

Quick Links	
ClinicalTrials.gov Number is required	ClinicalTrials.gov Number is required for billing. Enter in More Study Details
Contracts and Agreements Pathfinder (CAP)	Contracts and Agreements Pathfinder (CAP)
eIRB	eIRB
PeopleSoft Information Site	PeopleSoft Information Site
Performance Site Review Form FAQ	Frequently asked questions to assist with filling out the Performance Site Review Form
Research Portal	Research Portal
Research Wizard	Research Wizard
UTSW Performance Site Review FAQ	UTSW Performance Site Review FAQ (Updated November 2020)
Velos Glossary of Terms	Velos Glossary of Terms (Updated 1/1/2023)
Velos Standard Reports Glossary	Description and sample of Velos Reports (Updated October 2020)
Velos Tip Sheets and Helpful Guides	Study, Patient Registration, Coverage Analysis, Performance Site, etc.

Additionally, users may **Search a Study** by accessing the top navigation search option by study number, title, or keyword, or they may elect the **Advanced Search** option to filter using additional attributes. **NOTE:** users will need to deselect **“Exclude IRB- Study Closed Status”** if unable to locate the study.

This screenshot is identical to the one above, showing the Velos homepage. The 'Advanced Search' option in the top navigation bar is highlighted with a green border.

Within **Advanced Search**, users can search using the IRB ID (STU number) in the **More Study Details** field.

The screenshot shows the 'Advanced Search' form. It has a blue header with navigation menus for 'Personalize', 'Manage', 'Libraries', and 'Reporting'. Below the header, there are several search fields: 'Study #, Title or Keyword:', 'Cancer-Related Study:', 'Study Organizations:', 'More Study Details:', 'Status Type:', and 'Keyword:'. The 'More Study Details' field is highlighted with a red border and contains the text 'STU-2023-0000'.

The most recently modified studies for which the user has access will display by **Quick Access** options, **Study Number**, **Study Title**, and **Study Status**. **Quick Access** links allow you to easily access **Study Administration**, **Budgets**, and **Financial Summary**.

The screenshot shows the 'Last Modified Studies' section of the research portal. It features a table with columns for 'Quick Access', 'Study Number', 'Study Title', and 'Study Status'. Below the table is a 'My Links' section and a 'Quick Links' section with various utility links.

Quick Access	Study Number	Study Title	Study Status
	10748	AREN03B2: Renal Tumors Classification, B ***	IRB - Continuing Review Approved
	33640	NRG-GY019: A Randomized Phase III, Two-A ***	IRB - Mod Approved
	43218	Identification of Trends in Physical Ass ***	Study - Study Created in PPHS Velos
	34123	The effects of low-dose analgesics on ca ***	IRB - Mod Approved
	41475	Prospective, single institutional study ***	Study - Active/Enrolling

**Quick Links:**

- ClinicalTrials.gov Number is required
- Contracts and Agreements Pathfinder (CAP)
- eIRB
- PeopleSoft Information Site
- Performance Site Review Form FAQ
- Research Portal
- Research Wizard
- UTSW Performance Site Review FAQ
- Velos Glossary of Terms
- Velos Standard Reports Glossary
- Velos Tip Sheets and Helpful Guides

The **Study Administration** view gives users the ability to see **Summary information**, **Site/Team information**, **Protocol information**, **Forms**, **Milestones**, **Documents**, **Action Schedule**, **Reports**, and **Notifications**. The left side of the screen allows users to view the current statuses of a study.

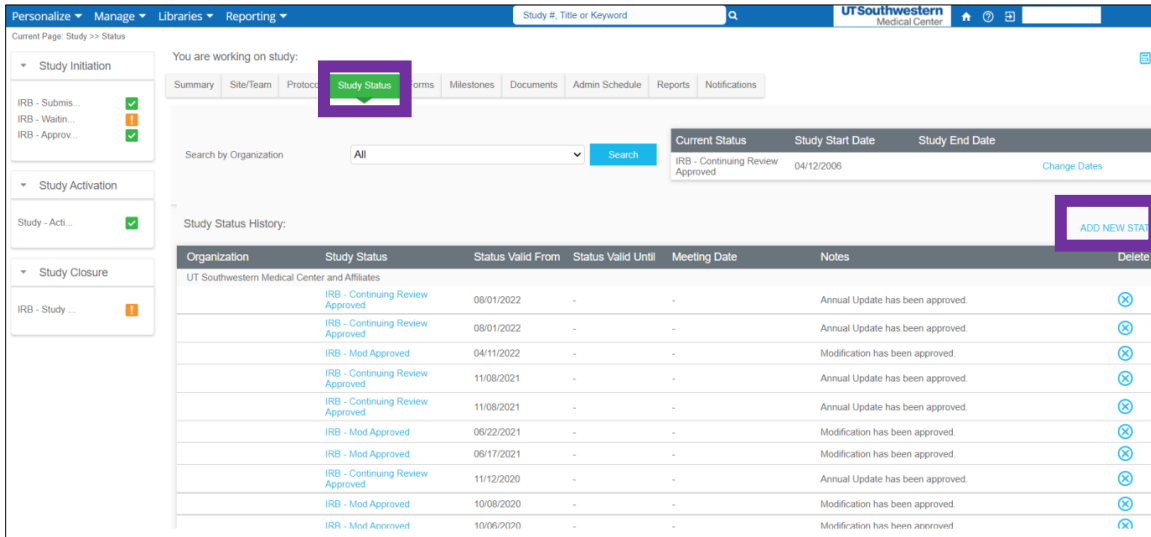
The screenshot displays the 'Study Summary' view. A green oval highlights the navigation tabs: Summary, Site/Team, Protocol, Study Status, Forms, Milestones, Documents, Admin Schedule, Reports, and Notifications. On the left, a sidebar shows the status of various study components:

- Study Initiation:** IRB - Submis... (green check), IRB - Waitin... (orange warning), IRB - Approv... (green check).
- Study Activation:** Study - Acti... (green check).
- Study Closure:** IRB - Study ... (orange warning).

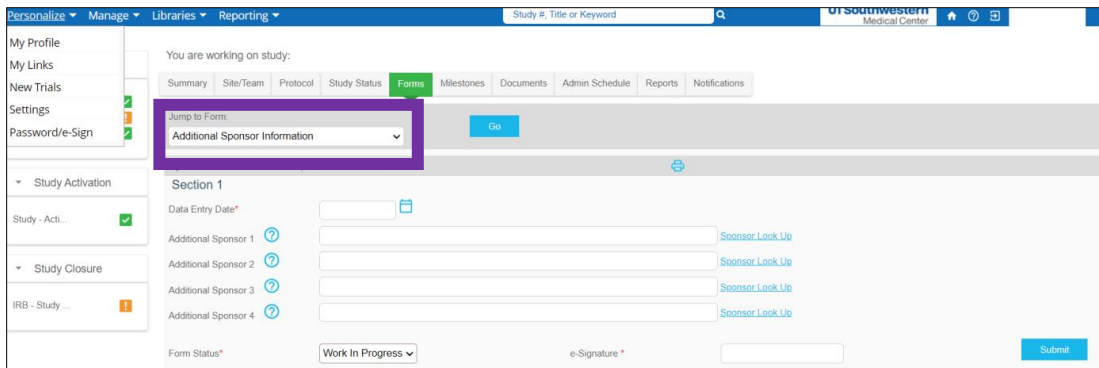
The main content area includes 'Study Information' with fields for 'Study Entered By', 'Principal Investigator', and 'Primary Research Coordinator', each with a 'Select User' link. It also features checkboxes for 'Principal Investigator was a major author/initiator of this study?', 'CTRP Reportable', and 'FDA Regulated Study'. The 'Study Definition' section includes 'Study Number (Velos ID)', 'Long Study Title', 'Objective(s)', and 'Summary'. At the bottom, there is a question: 'Do you want information in this section to be available to the public?' with 'Yes' and 'No' radio buttons.



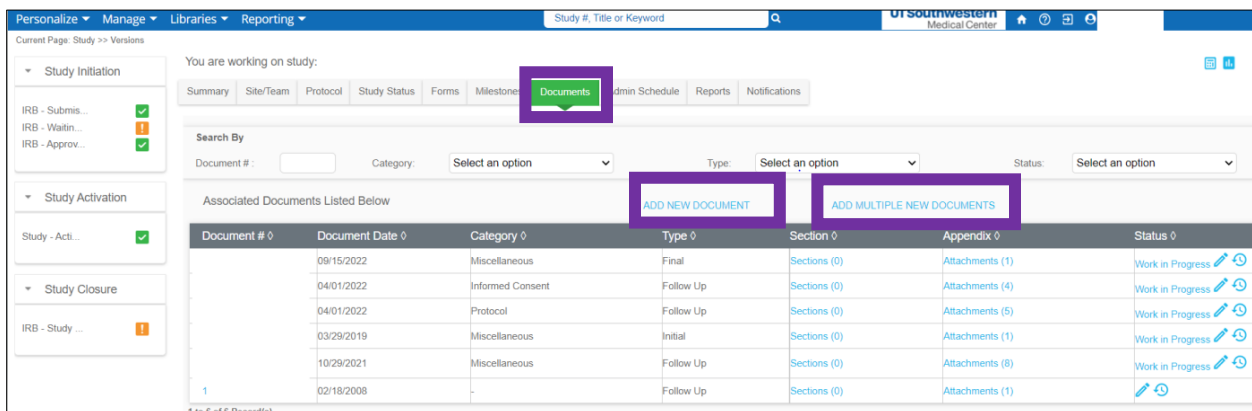
Under the **Study Status** tab, users will add a new **Coverage Analysis Study Status**. **NOTE:** this status will trigger a Velos notification to the [clinicaltrials@utsouthwestern.edu](mailto:clinicaltrials@utsouthwestern.edu) mailbox. This section also allows users to determine if anything further needs to be addressed.



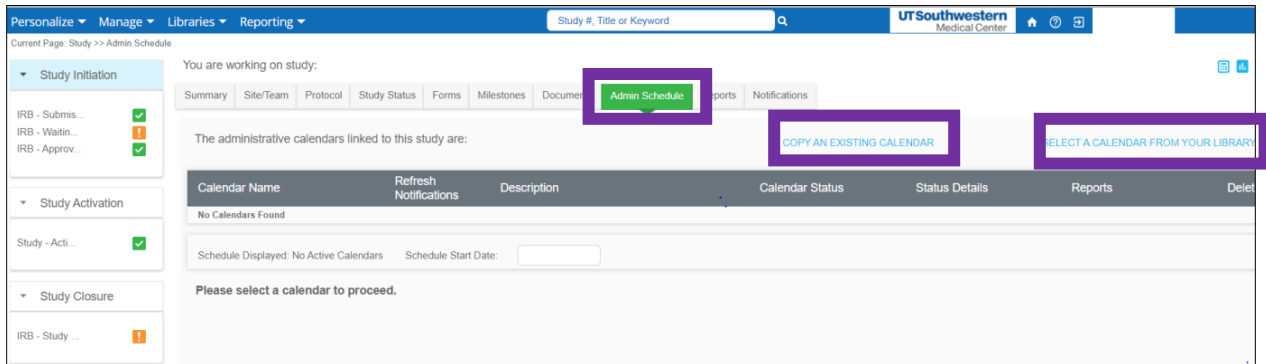
The **Forms** tab allows users to complete several requests in the pick list, including **Coverage Analysis Modifications**.



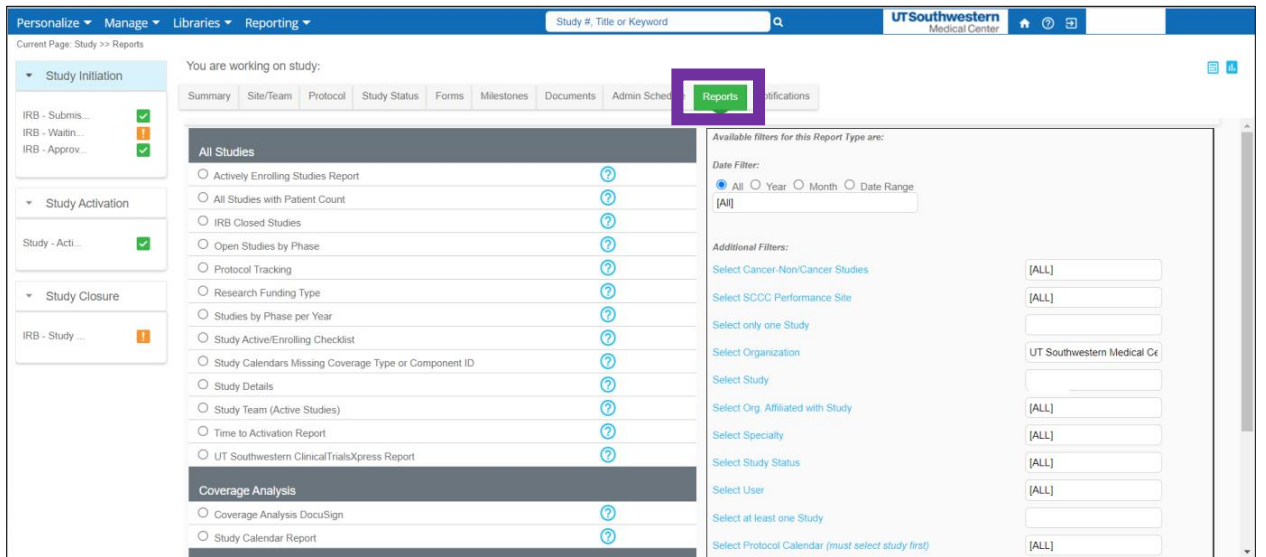
The **Documents** tab contains documents that are relative to the study, such as the protocol, informed consent, etc. Under the **Documents** tab users may click **Add Multiple New Documents** to upload draft contracts, draft budget, protocol, informed consent, and other regulatory documents.



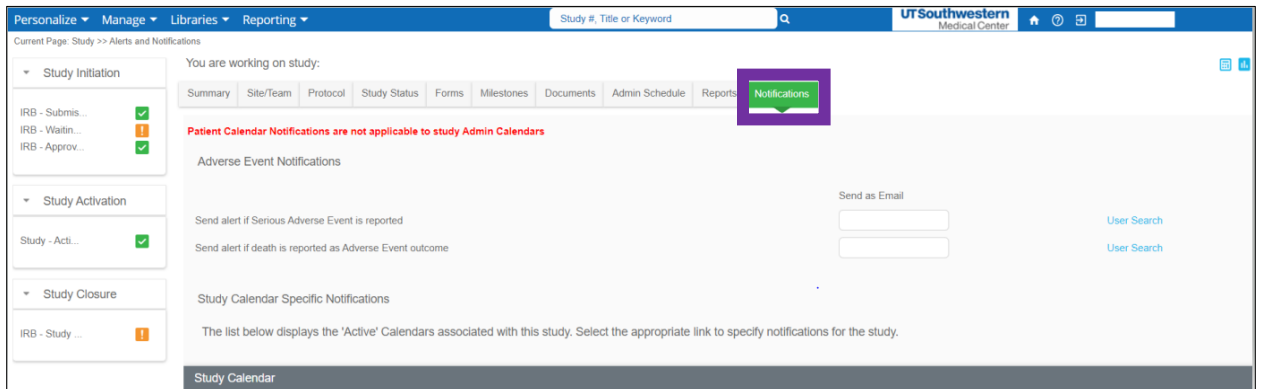
Within the **Admin Schedule** tab, users may associate and generate administrative calendars to a specific study to manage Administrative Calendar events. The main features of the **Admin Schedule** tab are the ability to select a calendar from your library to associate with a study or copy an existing calendar that pre-exists within the selected study.



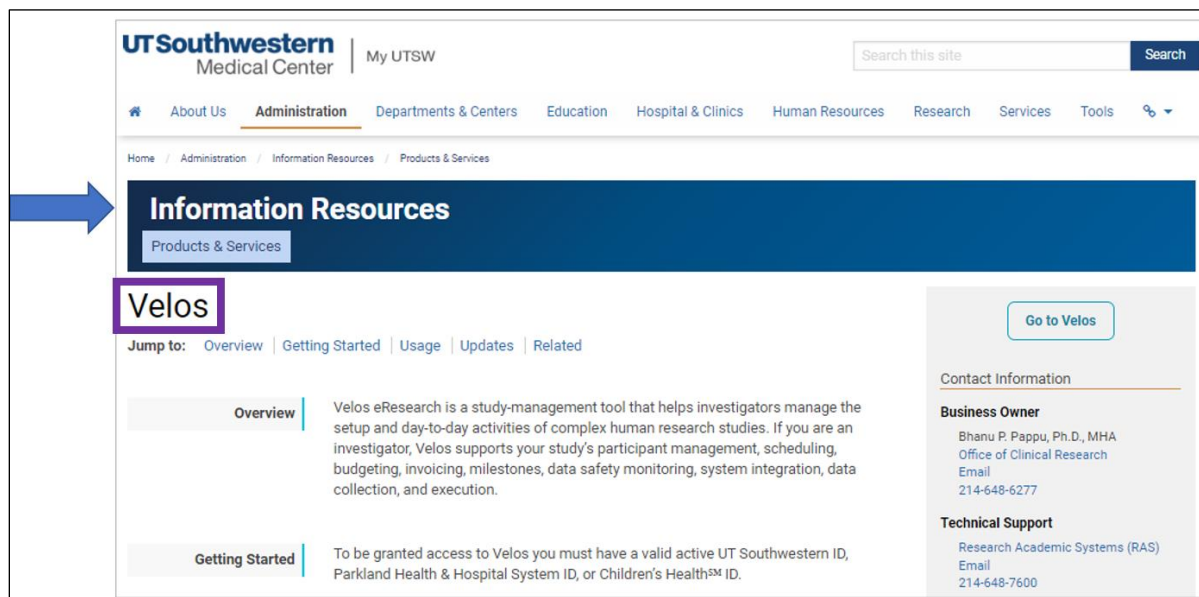
**Reports** are initiated by study staff. The CA team builds out the CA based on what is submitted. This tool is used for billing compliance until the end of the study.



**Notifications:** is populated by the study team.



For more information about Velos Study Creation, Patient Registration, Velos/Epic Integrations, or Velos Gadgets, please reference the [Information Resources Velos webpage](#).



The screenshot displays the UT Southwestern Medical Center website. The header includes the logo, 'My UTSW', a search bar, and a navigation menu with categories like 'About Us', 'Administration', 'Departments & Centers', 'Education', 'Hospital & Clinics', 'Human Resources', 'Research', 'Services', and 'Tools'. A breadcrumb trail shows 'Home / Administration / Information Resources / Products & Services'. A blue arrow points to the 'Information Resources' section, which contains a 'Products & Services' sub-header. Below this, the word 'Velos' is highlighted with a purple box. A 'Jump to:' menu offers links for 'Overview', 'Getting Started', 'Usage', 'Updates', and 'Related'. The 'Overview' section provides a detailed description of Velos eResearch as a study-management tool. The 'Getting Started' section outlines the requirements for access, such as having a valid active UT Southwestern ID. On the right side, there is a 'Go to Velos' button and a 'Contact Information' section listing the Business Owner (Bhanu P. Pappu, Ph.D., MHA) and Technical Support (Research Academic Systems (RAS)).

## Resources

[IR Velos Overview Site](#)

[SPA Research Systems webpage](#)

[SPA Software and Web Applications Guide](#)

[SPA Clinical Research Review Study Webpage](#)

[Clinical Research Services Overview Taleo Module](#)

[Velos Login](#)