**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**:
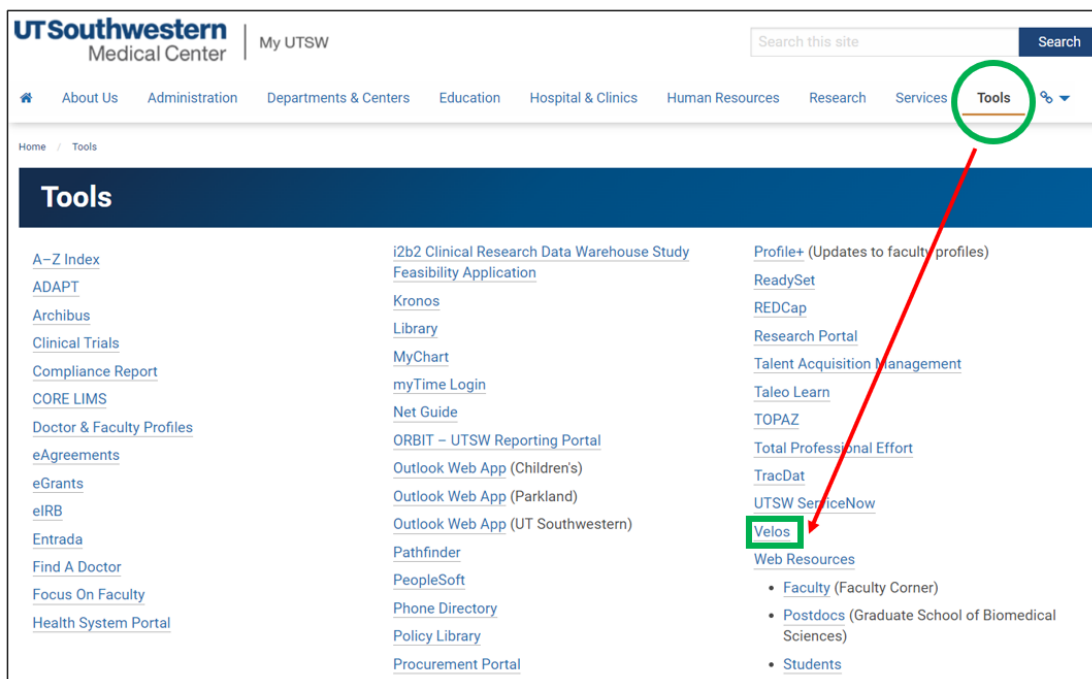


Log in using your UTSW username (lowercase only) and password:



**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.



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.



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

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 **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 **Site/Team** tab shows the primary roles that the study team play. Examples of roles are PI, Study Author, Finance Staff, and other personnel. You also can add or edit study team members.



The **Protocol** tab gives a calendar view of the billable protocol events. Click one of the items under **Calendar Name.**



After selecting a **Calendar Name**, a **Calendar grid** will display specifics of a patient visit or test. To return to the **Summary Administration** view, click the back arrow at the top left of your screen.

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 mailbox. This section also allows users to determine if anything further needs to be addressed.
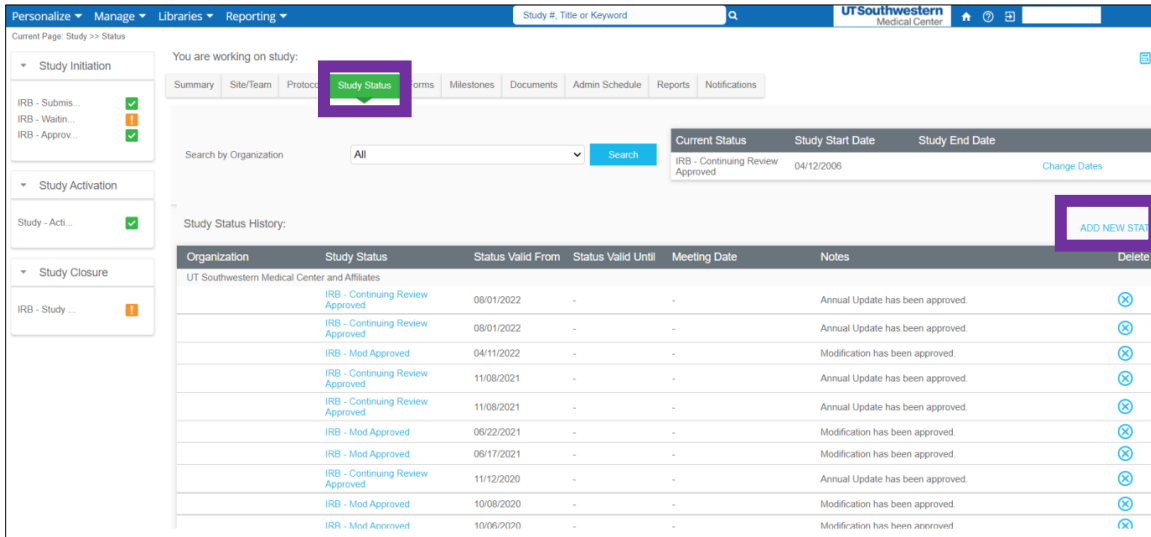


The **Forms** tab allows users to complete several requests in the pick list, including **Coverage Analysis Modifications**.
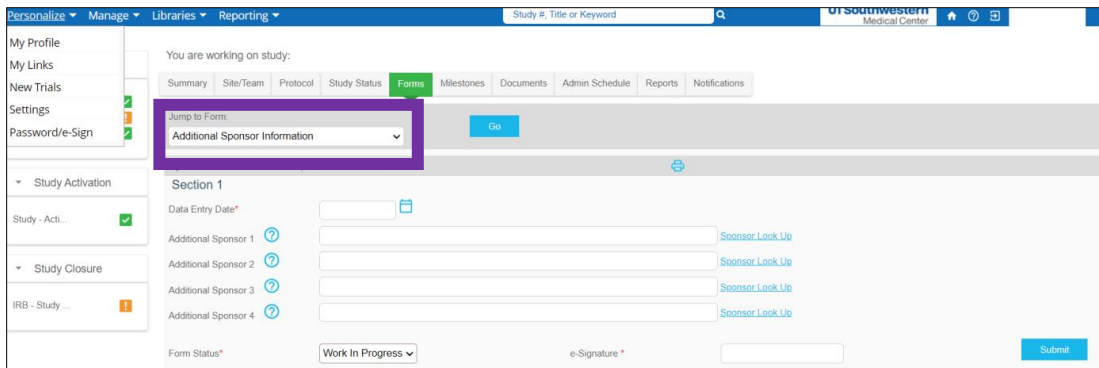


The **Documents** tab contains documents that are relative to the study, such as the protocol, informed consent, etc. Under the **Documents** tab users may click **Add Multiple New Documents** to upload draft contracts, draft budget, protocol, informed consent, and other regulatory documents.
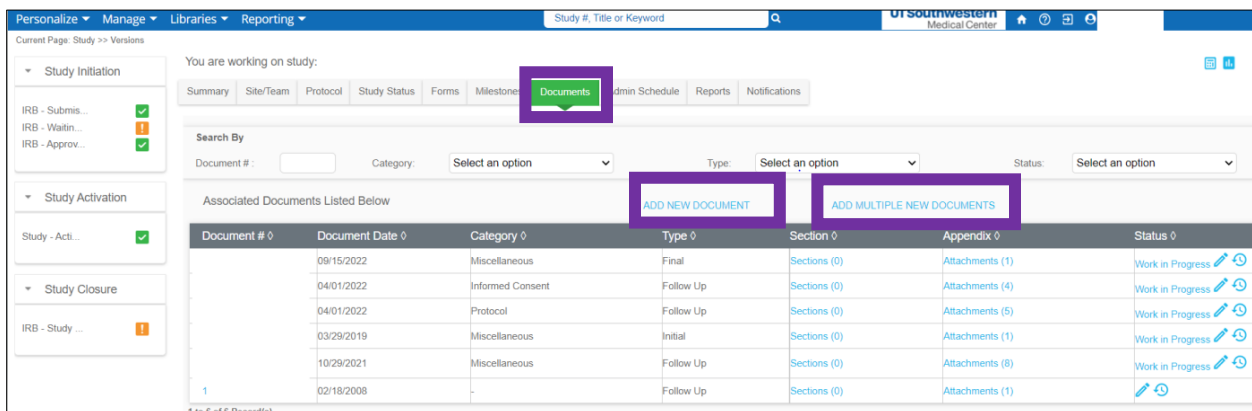
Within the **Admin Schedule** tab, users may associate and generate administrative calendars to a specific study to manage Administrative Calendar events. The main features of the **Admin Schedule** tab are the ability to select a calendar from your library to associate with a study or copy an existing calendar that pre-exists within the selected study.
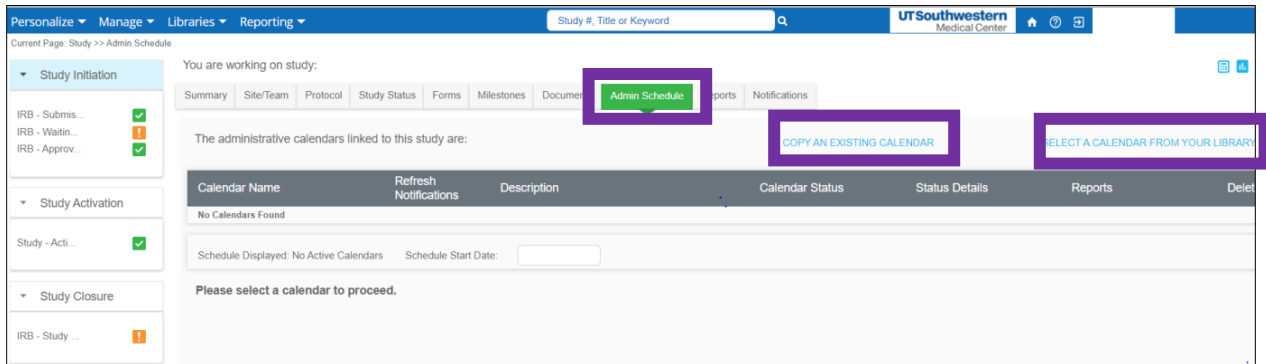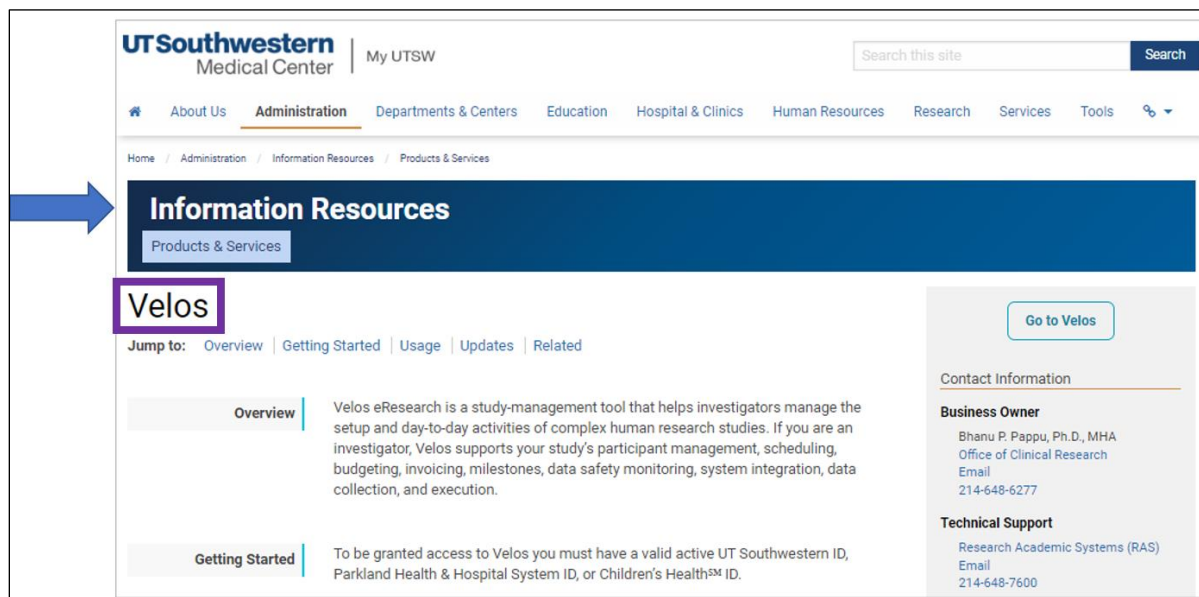


**Reports** are initiated by study staff. The CA team builds out the CA based on what is submitted. This tool is used for billing compliance until the end of the study.
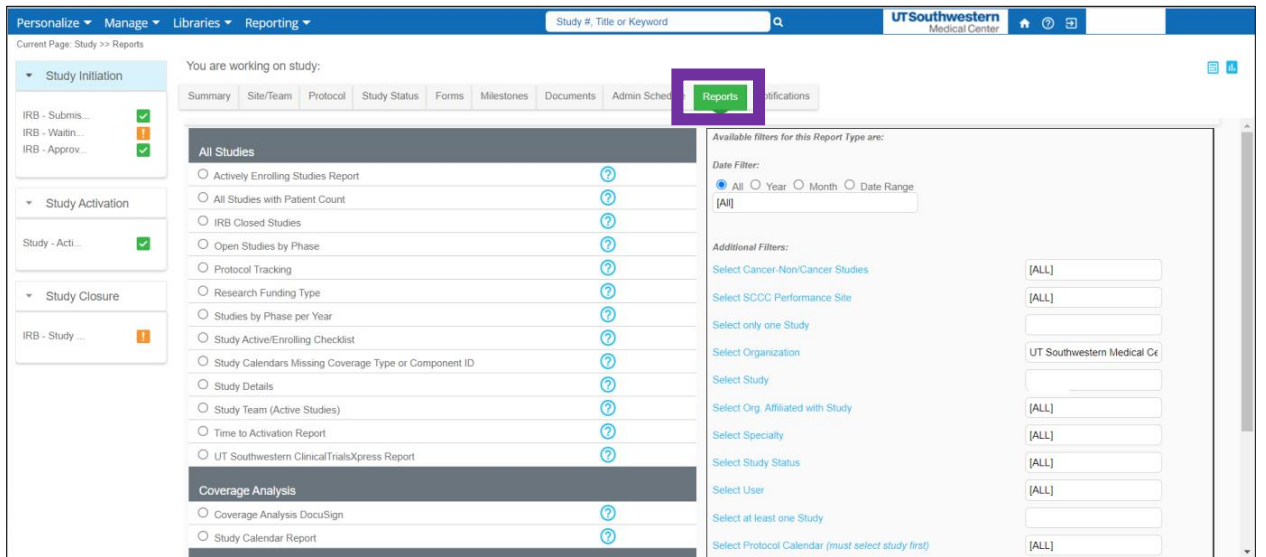


**Notifications**: is populated by the study team.
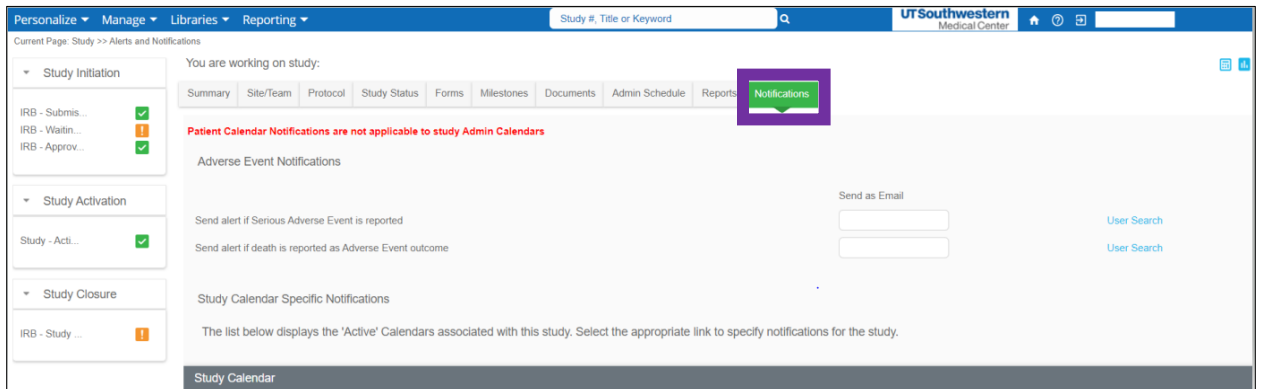
For more information about Velos Study Creation, Patient Registration, Velos/Epic Integrations, or Velos Gadgets, please reference the Information Resources Velos webpage.



**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