

# How to Upload an ICF to a Patient in CREDIT

These instructions show users how to upload a signed consent form for a specific patient and study.

**Step 1:** After logging into [CREDIT](#) and activating a patient on a study arm, a user can upload the patient's signed ICF so that it is directly connected to that patient and study. From the Patient Data (Photo Page) click on Patient Documents in the mini menu in the bottom left of the screen.

The screenshot shows the CREDIT system interface. At the top, there is a navigation bar with icons for Patients, Prestudy, Protocols, Print, Mail, Reports, Help, and Main Menu. Below this, there are tabs for PHOTO, ADDRESS, and MEDICAL. The main content area displays patient information for a patient named 'Demo'. The information includes Name, Gender (Male), Occupation, Ethnic Category (Not Hispanic or Latino), Ethnic Race (Black or African American), Birth Date (April 22, 1964), Death Date, Reason for Death, and Continued Contact options. There are also fields for Originating Institution (CHRISTUS System Office) and Medical Record Number. At the bottom left, a mini menu is open, showing options like Search For Patients, Patient Data (Photo Page), Consent Form Log, Patient Surveys, and Patient Documents. A red arrow points to the Patient Documents option. Other buttons like 'Add Patient to Pre-study', 'Archive', 'Save & Continue', and 'Add New Protocol for Patient' are also visible.

**Step 2:** Select the study that the consent form relates to (A), click Select File to upload the document and give it a title (B), and click Add This Document (C). Ignore the selection for Folder and Activity.

The screenshot shows the document upload interface. At the top, there is a 'Document Validated For Use On' section with a date selector set to August 2, 2017. Below this, there is a section for selecting the study. The 'None' option is unselected, and the 'Demo Study: PATIENT SUM' option is selected, indicated by a red arrow labeled 'A'. The next section is 'Please Select the Patient Form To Upload:', which includes a 'Select File' button and a 'Drag & Drop Files' area, with a purple arrow labeled 'B' pointing to the 'Select File' button. Below this, there are fields for 'Document Title', 'Folder', and 'Activity'. The 'Folder' field is set to 'Ignore' and the 'Activity' field is set to 'Optional: Select Event for Patient Calendar', both with blue arrows labeled 'C' pointing to the 'Ignore' buttons. At the bottom, there is an 'Add This Document' button, also with a green arrow labeled 'C' pointing to it.

**Step 3:** At the top of the screen you will see a listing for a document that was just loaded. Multiple consent forms can be loaded if necessary per patient per study in this way.

**Show folder:**  
All Folders ▾

Patient Document	Folder	Authorized On	For Protocol	Delete
<a href="#">Demo Consent 1</a> (demo-document.pdf)	No folder ▾	06/12/2017	Demo Study	<input type="checkbox"/>

**Save & Continue**      **Delete Checked Document(s)**

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