How to Search for Patients in CREDIT
Patient File Cabinet & Prestudy

These instructions show users how to search for a patient in CREDIT in both the Patient File Cabinet and Prestudy.

Important: CREDIT stores patients in two separate 'lists.' A patient can be found in the Patient File Cabinet, Prestudy, or both. A new patient is added on the Prestudy side. If they failed screening or were never enrolled in a study, they would only exist in the Prestudy 'list.' Patients that are enrolled in a study would be copied to the Patient File Cabinet 'list,' but it's also possible a patient is only in the Patient File Cabinet 'list.' This would happen because of patients being added to CREDIT who were enrolled in a study before CREDIT went live. **You can only search one 'list' at a time.**

Step 1:   From the CREDIT homepage, select Patient File Cabinet (**A**) or Prestudy (**B**).

Step 2:   Select the institution. IRBs have a purple background and red text, facilities have a white background and black text, and the user's 'home' facility has a yellow background with red text. This step doesn't necessarily matter for just searching for patients since you can find patients from any institution no matter which you pick, but it does determine the originating hospital when you add a patient.
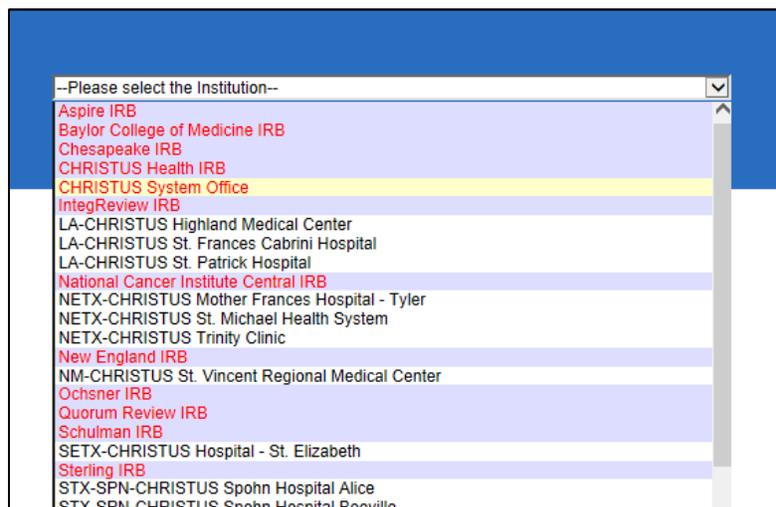
Step 3:   In the bottom right of the screen, type in the text box (**A**) what to search for, and select options in the list (**B**) where to search. You can select multiple options. Then click **Search** (**C**).
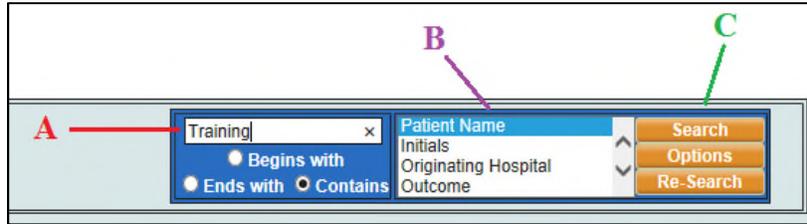
Step 4: Select the patient that matches what you were looking for by clicking on a field that is blue and underlined. You can always customize your search options by clicking **Options** in the bottom right. This will allow you to specify which options are listed (**B** in step 3) and in what order, and how they are displayed once a search has been completed.

Searching Patient Name with the following keyword:
1) Training

Found 1 Record

Patient Name	Initials	Contact Date	Outcome	Patient Protocol ID	Coordinator	Investigator
Delete, Training	JD	04/25/2017	Went On Study			

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