USER GUIDE

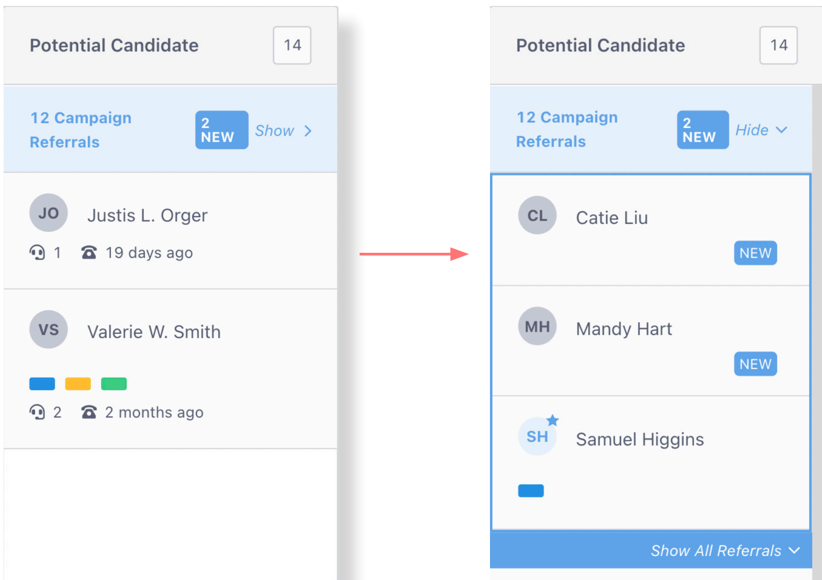
4 Steps to Effectively Manage Patient Referrals in StudyTeam

Introduction: What is Referral Partner Interface?

To streamline your workflow, you can receive, review, and update your patient referrals from your referral vendors directly in StudyTeam. Through OneStudyTeam's Referral Partner Interface (RPI), referral vendors will now share the patients they identify with your team in StudyTeam, so that you can review and update them right where you are already working! This step-by-step guide will walk you through the necessary actions to take once you receive a new patient referral in StudyTeam.

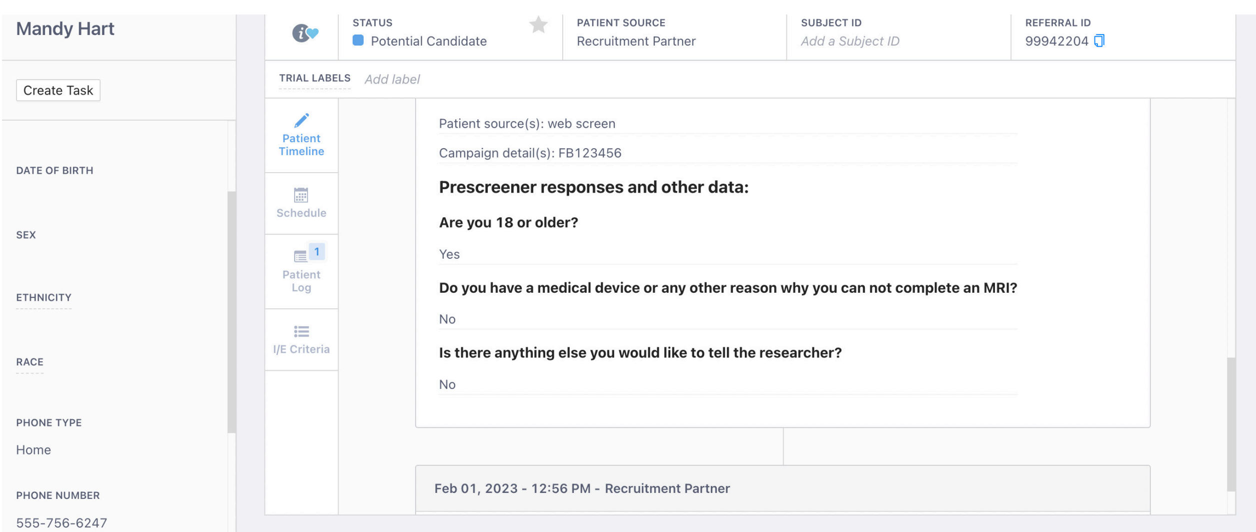
1. Open and review the referred patient's information.

An email notification will alert you when a new referral is available for review in StudyTeam. Log into StudyTeam and click on your trial. At the top of the Potential Candidate column, select the **Campaign Referrals** section to expand it, so you can see referrals with the **NEW** badge next to their names.



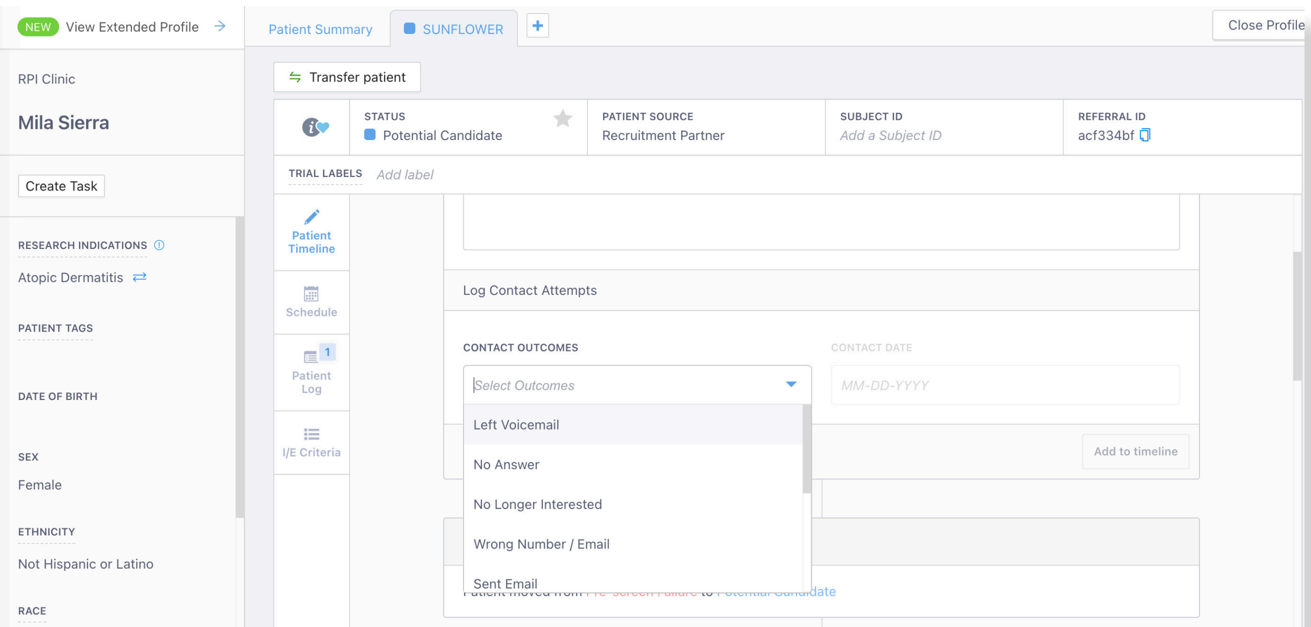
*All information contained in the images throughout this guide is sample data for fake patients and trials

Click a name and pull up your referral's Patient Card. Take a look at their contact information on the left side of the page, as well as their pre-screening responses in the middle of the Patient Card under **Patient Timeline**.



2. Contact referred patients within 48 hours.

Once you review the patient's information, contact them within two days to connect with them while they are most interested in trial participation. Share your referral's progress by logging your contact attempts in the Patient Timeline.

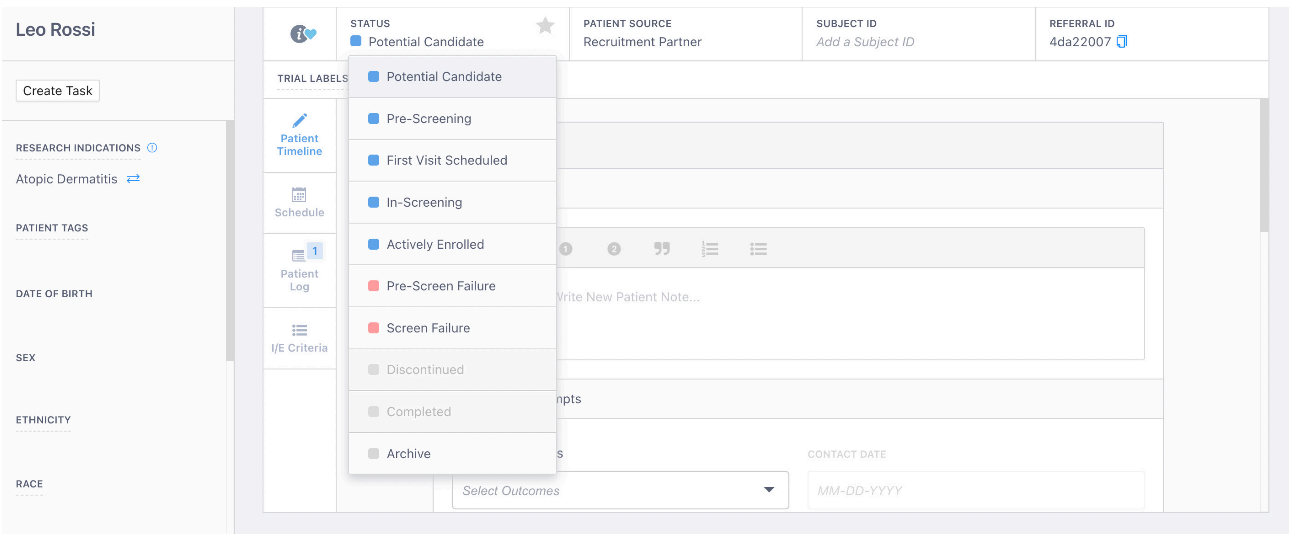


Please note: All notes that you add are for internal use only; they are not visible to the sponsor or referral vendor. The sponsor or referral vendor will only receive de-identified updates on the date of contact attempts and contact outcomes so that they can learn how the patient is progressing without needing to call you.

3. Update the patient's Status.

Once you have successfully contacted the patient, update their Status so everyone in StudyTeam knows whether that patient has moved to Pre-Screening, First Visit Scheduled, In-Screening, etc.

To update the Status: Click the **Status** drop down tab at the top of the Patient Card or return to the Trial Board and drag and drop the patient from the **Potential Candidate** column to the correct Status.



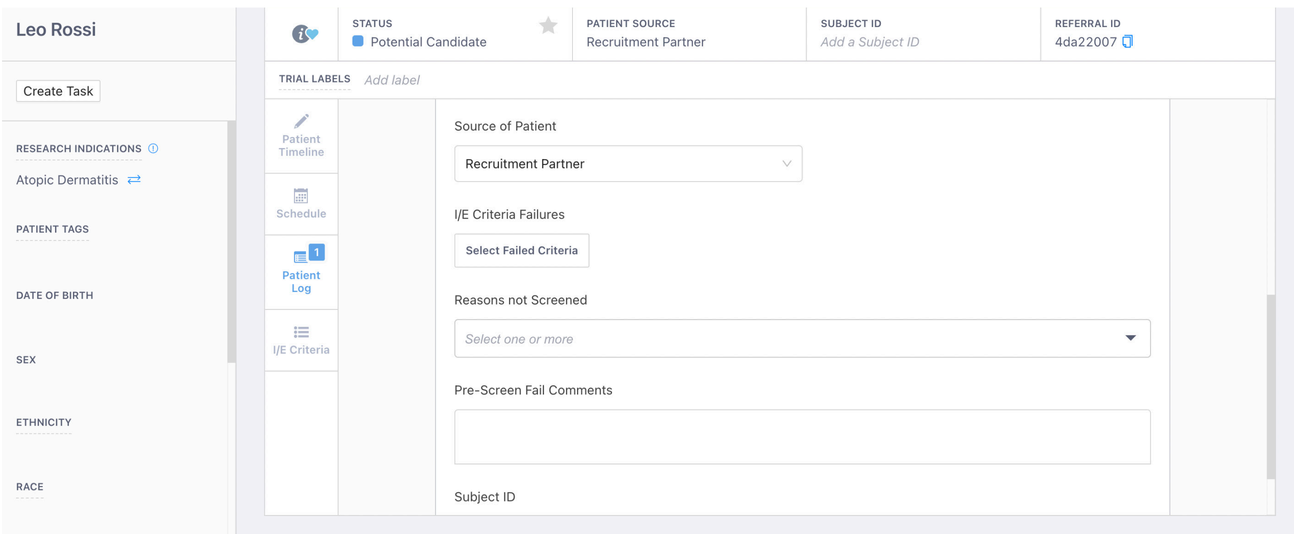
Please note: Referrals should only be put in the Archive status if they are a duplicate.

4. Update the Patient Log at least every two weeks.

To provide valuable de-identified data to your sponsor, be sure to update the Patient Log to reflect referral updates as well.

To update the Patient Log:

1. Click on **Patient Log** in the navigation bar and look for pending questions for your patients marked by a blue flag.
2. Answer the related log questions, which could include patient source as well as I/E criteria failures, to automatically share those updates with your sponsor.



This cuts out unnecessary conversations with your sponsor while giving them the visibility they need to keep enrollment on track.

For additional support, please reach out to **support@onestudyteam.com** or your assigned Site Engagement team member.

Frequently Asked Questions

Is OneStudyTeam a referral vendor?

No. OneStudyTeam simply provides the technical infrastructure to connect a referral vendor's information to the StudyTeam platform. We do not source patients directly.

Can sites only connect StudyTeam to referral vendors through sponsors?

No. While sponsors often run referral campaigns with their preferred vendors, sites can choose to connect to referral vendors on their site-funded campaigns as well. If you would like to see your chosen vendor's referrals in your StudyTeam account, reach out to **partnerships@onestudyteam.com** for more information.

How many times should I reach out to a referred patient before marking them as a Pre-Screen Failure?

Our referral vendor partners recommend attempting to reach each patient at least three times, ideally at different hours of the day. This strategy is also likely to increase the likelihood of connection.

RPI WORKFLOW

Referral vendor shares patient information in StudyTeam

↓

Email notification alerts site to new patient referral

↓

Site logs into StudyTeam to review patient's information

↓

Site contacts patient and logs contact attempt in Patient Timeline

↓

Site updates Patient Status

↓

Site updates Patient Log

↓

Site continues pre-screening and screening processes