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The Protocol Search Function

In this training document, you will learn about the protocol search function of JeffTrail.

The Protocol Search section of JeffTrail allows you to find a specific protocol or protocols based upon a variety of criteria. Report results can be exported to PDF or Excel formats.

The Protocol Search page is accessed by the Protocols ➔ Protocol Search menu item. The page provides multiple fields for entering search criteria. Several fields are labeled Multi-Select, allowing more than one value to be considered a ‘match’ when conducting a search.

The search criteria fields are arranged into sections. To aid visibility, some section headings include [+ ] and [ - ] hyperlinks to display and undisplay the section’s fields.

You may use any number of fields from any combination of sections to define the criteria for your protocol search. After entering your criteria, click the Search button to generate a list of matching protocols.
Search criteria may be removed from all fields by clicking the Clear button.

**Protocol Search Options**

*Filter Type*

Filter Type radio buttons are available throughout the Protocol Search page and may be used to refine your search criteria:

To include protocols that have *any* of the selected criteria, select the ‘Contains Any (OR)’ radio button. To include protocols that meet *all* of the criteria listed, select the ‘Contains All (AND)’ radio button. To exclude protocols that meet the selected criteria, select the ‘Does Not Contain’ radio button.

*Sort By (Initial Sort)*

At the bottom of the Protocol Search page are two fields used to determine the initial order of the search results. Results may be sorted by one of a number of fields, in Ascending or Descending order.

Initially, you are provided this default sort order:

Use the fields to select different criteria:

These fields determine the sorting criteria used when the search results page is initially displayed. The search results page has its own sorting.

*Search Results*

Search results vary depending upon inclusion criteria. The following screenshot is an example of Protocol Search results:
The header displays the search criteria used. Column headers are hyperlinks. Clicking a column header hyperlink will sort the results based on the data in that column (by default, sorting is alpha/numeric based). A subsequent click on the column header hyperlink will sort in ‘reverse’ order.

In the body of the report, each row represents one protocol. Protocol numbers are usually displayed as hyperlinks. Selecting a hyperlink brings you to the PC Console → Main → Details tab for that protocol. If no hyperlink is available, you do not have the privileges required to view the protocol.

You may change the number of results available by selecting a different value from the Page Size drop-down menu. An additional filter may be applied to reduce the results by typing any filter criteria. Finally, the results page number may be selected or you may scroll through the pages by clicking the arrows available to you.

The bottom section of the result page displays the number of protocols matching the search criteria, and buttons to view or export the data in different formats.

Clicking on the [Back to Search] button takes you back to the search page where you may modify your search. Clicking on the [View Excel] button will
transfer the results to an Excel spreadsheet. Clicking on the [View PDF] button will create a PDF version of the results.

**Configuring Search Result Display**

By default, the results display the following fields: Protocol No., Additional Protocol Numbers, Department, Title, current PI Name (according to Protocol Staff Start Date/Stop Date information), Current Status, Status Date, and Priority Score. By checking the checkbox to the left of a search field, the data for that field will be included in the results. The field does not need to be used as part of the search criteria.

Checkboxes that are checked and disabled are required for the output and will always be shown. Checkboxes that are checked on the main Protocol Search page can be cleared by clicking the [Clear] button.

**Protocol Search Criteria Fields**

Protocols are found based upon the search criteria entered into the Protocol Search fields. The following sections explain how these fields are used.

Remember, multiple fields can be selected for an individual search. Selecting multiple fields will narrow the search results; all of the search criteria need to be met before the protocol will be selected for the result list.

**Protocol Status**

You may select any number of protocol statuses to search on for a date range.

Searching on status requires you to enter information in the From Date and Thru Date fields. Using these fields narrows your search and will retrieve protocols assigned to the specified status(es) at any point during the date range.

For example, if a protocol is new or received IRB Initial Approval at any time in 2013, it will be found by the criteria specified in the screenshot above.

Searching based on Status Change will show any protocols that were changed to that status during the date range.
Using the example in the screenshot above, if a protocol was opened to accrual at any time in 2013 it would display in the result list.

The Pending/Active/Completed checkboxes at the bottom of the Protocol Status section applies to the main protocol status. The Pending checkbox will select protocols not yet Open to Accrual. The Active checkbox will select protocols with a status of Open, Closed, or Suspended. The Completed checkbox will select protocols that have a status of Abandoned, Terminated, or IRB Study Closure.

**Participating Institution**

The Participating Institution section gives the ability to find protocols where the specified institution has been added on the PC Console > Institution tab and has a status of Pending, Active, and/or Completed. The Institution and Pending, Active, and Completed checkbox fields work in conjunction with each other.

Selecting an institution requires you to select a Pending/Active/Complete status and *vice versa*. (The Research Center institution is not available in this Institution field. To search on the Research Center’s status, see the previous Protocol Status section.)

- **Protocol No.** – This is a flexible search field. If you enter ‘BMT’ in this field, a list of all protocols containing ‘BMT’ in their protocol number will display. All of a protocol’s numbers are considered, including the IRB Number, Pharmacy Number, and Sponsor Number.
- **Summary Accrual Only** – By marking this checkbox the results will be limited to protocols where the Summary Accrual Info Only has been set to Yes on the PC Console → Main → Details tab.
• **Open For** – This drop-down field is used to search for ‘All’ protocols (default), protocols open at RC/CC **not** marked as ‘Open for Affiliates Only’ on the PC Console → Main → Details tab, or protocols that are open for affiliates only **marked** as ‘Open for Affiliates Only’ on the PC Console → Main → Details tab. This search criterion does not look at the protocol status.

• **Title** – This field looks for matches in either the title or the short title entered for each protocol on the PC Console > Main > Details tab. An entry in this field will be used for full or partial matching. For example, searching for parts of the whole title such as ‘meta’ or ‘static’ will return protocols with ‘Metastatic’ in the title.

• **Institution** – This search will show protocols with the institution(s) assigned on the PC Console → Institution tab. This search criterion does not look at the institution status.

**Protocol and Participating Institution Status Searches**

When you want to search on the Research Center’s protocol status and the status of a participating institution at the same time, both of the previous sections need to be used.

**Staff**

• **Staff Name** – This field will select protocols with the staff member assigned as Protocol Staff or Subject Staff, based on the Scope field setting outlined below. (This and other Staff fields do not take into account the Start Date or Stop Date information of the staff on the protocol or subject.)

• **Staff Role** – Selecting a Staff Role will limit the results to protocols having Protocol Staff or Subject Staff assigned to the role. A column in the results will display all staff members assigned to that role.

• **Scope** – The Scope drop-down field can be used to determine whether the search using the Staff Name and Staff Role should look for the staff as Protocol Staff only, Subject Staff only, or both. When the field is blank JeffTrial searches both Protocol Staff and Subject Staff.
**Main**

The search fields contained in the Main section refer to data stored on the PC Console → Main → Details tab.

- Age Group
- Data Monitoring
- Department
- Investigational Drug
- Investigator Initiated Protocol
- Phase
- Scope
- Protocol Type
- Summary 4 Report Type
Management

The search fields contained in the Management section correspond to the PC Console → Main → Management, Sponsor, and IND/IDE tabs as well as the Institution tab.

- GCRC No.
- Grant/Fund Acct. No., Grant No. Only, and Fund Acct. No. Only
- Hospital Account
- Internal Account No.
- IRB No.
- Management Group
- NCT Id.
- Network
- Oncology Group
- PDQ No.
- NCI Trial ID
- Pharmacy No.
- PRMC No.
- Toxicity Scheme
- Program Area
- Sponsor
- Sponsor Type
- Sponsor Role
- Principal Sponsor Only?
- Checkbox
- IND ID
- IDE ID
**Treatment**

The search fields contained in the Treatment section correspond to the PC Console → Treatment → Details and Disease/Diagnosis tabs.

- Disease Site, Diagnosis Group
- Drug
- Modality

**Accrual**

The search fields contained in the Accrual section correspond to the PC Console → Main → Details tab and actual accruals associated with a protocol.

- **AF Accrual** – By selecting the checkbox for AF Accrual, the search results will include a column indicating the actual Affiliate accrual for the protocol.
- **RC/CC Accrual** – By selecting the checkbox for RC Accrual, the search results will include a column indicating the actual Research Center accrual for the protocol.
- **VA Accrual** – By selecting the checkbox for VA Accrual, the search results will include a column indicating the actual accrual for the institution type of ‘VA’ (Veteran’s Administration) for the protocol.
- **Total Accrual** – By selecting the checkbox for Total Accrual, the search results will include a column indicating the actual total accrual for the protocol.
- **Target Accrual** – By selecting the checkbox for Target Accrual, the search results will include a column indicating the Protocol Target Accrual listed on the PC Console → Main → Details tab, Accrual Information section.
- **Accrual Reporting Period** – When the date range fields in this frame are used, the Accrual displayed using the columns described above will show the accrual for the date range entered. The columns will display the total accrual if the date range is not entered.
Saved Protocol Searches

Search criteria that are used often may be saved to increase your searching productivity in the future.

After you have created a Protocol Search that you would like to be able to run again, you can save it by clicking the [Save As] button near the top of the page. A prompt box will pop up where you can enter a name for the search and then click the [Save] button.

To recall a saved Protocol Search, select it in the Saved Searches field. The search name will display, and the saved search criteria will load into their respective fields. You may modify the search criteria if you wish. Once your criterion is in place, use the [Submit] button to execute your search.

If you want to remove a saved Protocol Search from the system, select it and then click the [Delete] button at the far right. If you have modified the search and want to save it under the same name, you can click the [Update] button to do so. If you have modified the search and want to save it under a different name, you can click the [Save As] button and enter the name of the new saved search.
Protocol Searches that have been saved are displayed on the Saved Searches widget on the Home page.