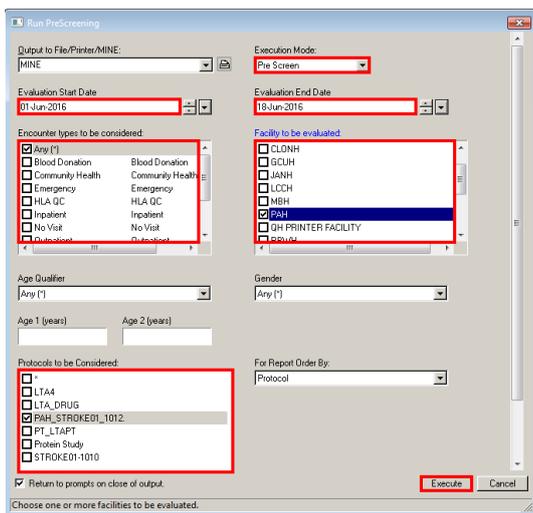# PowerTrials: PPM – pre-screening

Quick reference guide

Patient Protocol Manager (PPM) has the functionality to run a pre-screen to see if any eligible patients exist for a study. A Pre-Screening Rule built in the background is run against patients within the EMR and potential eligible patients are returned that meet the pre-screen rule.

1. Within PPM, click on the relevant protocol or amendment under the Initiating Service folder.

2. Click the Run Pre-screening icon in the toolbar.

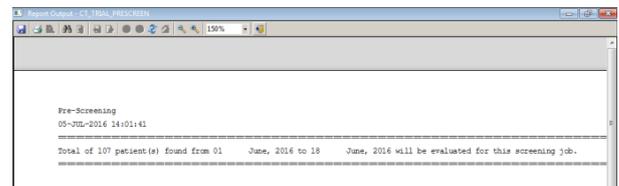   The Run PreScreening window will open.

3. Select the desired Execution Mode:

   a. Pre Screen: This execution option will return a number displaying how many patients meet the criteria of the selections made on this window, and run pre-screening against these patients to determine which ones are eligible for the selected protocol. This option does not show patient details on the report.

   b. Patient Inquiry: This execution option will only return a list of eligible patients and not run pre-screening against them. You would use this option to get an idea of potential patients.

4. Input the required Evaluation Start/End Dates. These refer to the patient encounter start and end dates.

5. Mark off the Encounter types to be considered.

6. Select the Facility to be evaluated.

7. If desired, select an Age Qualifier.

8. If desired, select a Gender to be pre-screened.

9. Confirm your protocol is selected under Protocols to be Considered.

10. If more than one protocol is selected, how the report is organised can be changed using For Report Order By dropdown menu.

11. Click Execute.

    The Report Output window will open displaying the report.

12. The report can be saved or printed, if desired, using the respective icons in the toolbar.

13. Click Exit.

14. Click Cancel to exit out of the Run PreScreening window.

15. Click the Prescreening Job Status icon on the toolbar to see if any patients have qualified for your protocol as a result of the Pre-Screen report that was just executed.

    The PowerTrials Screening Job Status window will open listing previously run pre-screening jobs.

16. Confirm the pre-screen is Complete under the Status column and identify the number of patients eligible under the Qualify column.

17. Click Exit to close the window.

18. To view the newly pre-screening patients who have been identified as eligible, click the Pre-Screened Patients button under Enrolment.

19. Patients will display in the right view pane, with a Pre-Screened Status of Pending.