

Working with the Call Center

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Roadmap: Working with web-based patients


Web-based patients complete survey forms directly through the study website.

Step	Action	Description
1	Add a web-based patient.	<ol style="list-style-type: none"> 1 Complete the Patient Profile page. 2 Select Web as the Preferred Method of Contact. 3 You must also enter: <ul style="list-style-type: none"> ▪ Patient First Name and Last Name. ▪ Language. ▪ Patient email address. ▪ Phone and Confirm Phone. ▪ Time zone. ▪ Preferred time of contact.
2	The patient receives an email notification that a survey is due, as well as reminder notifications to complete the survey.	The patient must complete the survey on the website within a defined number of days (the web completion window). This window is established in the study design and can be edited in the Administration section of the OutcomeLogix application.
3	The patient completes the survey within the web completion window.	If the study is configured to issue eCodes, and if the patient completes the survey within the web completion window, the Call Center emails an eCode to the patient.
4	If the patient does not complete the survey within the web completion window, use the Call Center List to contact the patient by telephone and complete the survey.	<ol style="list-style-type: none"> 1 Select Call Center List . 2 Click the Patient ID link of a patient. 3 Call the patient. 4 Click Interview.
5	<p>The patient completes the survey with Call Center assistance.</p> <p>or</p> <p>The Call Center is unable to contact the patient and complete the survey.</p>	<ul style="list-style-type: none"> • If the patient completes the survey with Call Center assistance, and if the study is configured to issue eCodes, the OutcomeLogix application emails an eCode to the patient. • If the patient does not complete the survey within the specified window, or if the Call Center staff members have unsuccessfully attempted to contact the patient the maximum number of times defined for the Call Center, the survey remains blank and no eCode is provided.

Note: A patient can contact the Call Center to complete a survey outside the scheduled window (if permitted by the study design) or to report a major medical event. No eCode is associated with the reporting of a major medical event.

Roadmap: Working with phone-based patients

The Call Center List page prompts staff to call phone-based patients and help them complete their surveys.

Step	Action	Description
1	Add a phone-based patient.	<ol style="list-style-type: none"> 1 Complete the Patient Profile page. 2 Select Phone as the Preferred Method of Contact. 3 You must also enter: <ul style="list-style-type: none"> ▪ Patient First Name and Last Name. ▪ Language. ▪ Phone. ▪ Time zone. ▪ Preferred time of contact.
2	The application adds the patient to the call queue for contact during the survey window defined for each visit.	When due for a call, the patient appears on the Call Center List page.
3	The Call Center staff member contacts the patient by telephone to complete the survey.	<ol style="list-style-type: none"> 1 Select Call Center List . 2 Click the Patient ID link of a patient. 3 Call the patient. 4 Click Interview.
4	<p>The Call Center staff member assists the patient to:</p> <ul style="list-style-type: none"> • Complete the currently scheduled survey. • Complete all previously and currently scheduled surveys, if permitted by the study design. • Report a major medical event. 	<p>Do the following:</p> <ul style="list-style-type: none"> • Click the Override button and perform the interview. • Click the Override button and perform the interview. • Click the Call Center Intake Form button and help the patient to fill out the form for reporting the major medical event.
5	If the study is configured to issue eCodes, and the patient completes the survey with Call Center assistance within the Call Center window, the Call Center staff member emails or reads the eCode to the patient.	If the patient does not complete the survey within the specified window, or if the Call Center staff has unsuccessfully attempted to contact the patient the maximum number of times defined for the Call Center, the survey remains blank and no reimbursement is provided.

Step	Action	Description
6	If the Call Center staff member cannot reach the patient or contacts the patient but cannot perform the interview, the Call Center staff member logs the call.	<ul style="list-style-type: none">Click Log Call. <p>The OutcomeLogix application logs the call and increments the call attempt count.</p>

Note: A patient can contact the Call Center to complete a survey outside the scheduled window (if permitted by the study design) or to report a major medical event. No eCode is associated with the reporting of a major medical event.

Roadmap: Working with paper-based patients

Typically, the Call Center does not interact with paper-based patients. You can, however, report major medical events for paper-based patients and assist them in completing a survey, if requested.

Step	Action	Description
1	Add a paper-based patient.	<ol style="list-style-type: none"> 1 Complete the Patient Profile page. 2 Select Paper as the Preferred Method of Contact. 3 You must also enter: <ul style="list-style-type: none"> ▪ Patient First Name and Last Name. ▪ Language.
2	A patient contacts the Call Center to ask for help completing a survey or to report a major medical event.	The preferred method of contact of the patient determines whether or not the patient appears on the Call Center List page.
3	If necessary, on the Call Center List page, search for the patient.	<ul style="list-style-type: none"> • To view an individual paper-based patient, search for the specific patient by patient name or ID. • To view all paper-based patients, select Type and Paper, and click the Search button. • To view all patients, including paper-based patients, select All and click the Search button.
4	If requested, assist the patient to: <ul style="list-style-type: none"> • Complete the currently scheduled survey. • Complete all previously and currently scheduled surveys, if permitted by the study design. • Report a major medical event. 	Do the following: <ul style="list-style-type: none"> • Click the Override button and perform the interview. • Click the Override button and perform the interview. • Click the Call Center Intake Form button and help the patient to fill out the form for reporting the major medical event.

Note: The OutcomeLogix application does not assign eCodes to paper-based patients.