

Glasgow Clinical Trials Unit Guideline

Guideline number	57.016F	Version	1.0
Title	EDGE Workflows		

This guidance document describes the process to add a workflow to a study record on EDGE.

1. Adding workflow
 - a) Site level of study record
 - b) Click **Workflows** tab, click **Add**
 - c) From drop-down select relevant workflow

2. GCRF Finance Commercial/Non-commercial Closeout

Studies hosted by GCRF and closing will be recorded by a Workflow created on EDGE, and updated by each Team involved.

Once the close-out visit has been completed, the lead study nurse must record date of visit on EDGE study record:

1. Site level of study record
2. Click **Finances** tab
3. Click **Costs** tab
4. **Add templated cost**
5. Click **Monitor Visits**
6. Tick **Close Out Visit**, adding **Event Date**
7. **Invoice** cell, **Clinical Portal account details** or **no account**
8. **Comments** cell, Monitor name, GCRF staff and PI time preparing and during visit.

Lead Study Nurse must notify the Administration Manager or delegate the close-out visit has been completed

Administration Manager or delegate must add **Close-out Workflow** to EDGE study record following section 2 above.

Using the appropriate template for study type, section 3 Commercial Template or section 4 Non-commercial the Administration Manager or delegate notifies email recipients.

3. The following study close-out text to be copy/pasted to email and sent to GCRF Snr Management, Principal Investigator, R&I Finance, R&I Snr Manager, GCRF Information Manager. If applicable, R&I Pharmacy, Clinical Research Imaging Facility and Biorepository.

Dear All

This is a notification that has had a close out visit dated This has now been added to EDGE.

R&D Finance – Can you please confirm that EDGE cost templates match contract version, confirm the number of substantial amendments and update EDGE.

Lead Study Nurse – Please change study status to closed and add closing date to EDGE. Please check all visits and costs are entered, patient status for all participants is marked as complete and workflow is up to date. Can you also advise how many archiving boxes will be used and email me a copy of the Monitor Log.

Pharmacy – Please confirm all costs have been added to EDGE and that workflow is updated.

Research Admin Manager - I will add the close-out workflow, double check all monitoring visits and ensure remaining costs are complete on EDGE.

Kind Regards,

Guideline signatories

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Signature	Date
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Document history

Version	Date	Description
1.0	02/08/2023	First release

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