LEICESTER'S RESEARCH

NHS
University Hospitals of Leicester
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Appendix 6

FLOWCHART: Working Instructions for Adding UHL as a Site – Setting Up a New Study in EDGE

On EDGE, perform a **GLOBAL search** of the study by title, key words, or ref. numbers

If the study cannot be found on EDGE

If the project is on EDGE and UHL is listed as a site

If the project is on EDGE and UHL is not listed as a site

Create a new record by clicking Management> Project>New Project

Complete fields with as much information as possible (short title and summary are mandatory)

Click "Check for matching Project Identifiers" to check for duplicate studies

If a **duplicate** study is found, use that record. Do not generate a new study

If **no duplicate** studies are found, click "save"

If **more than one duplicate** study is found, contact RIData@uhl-tr.nhs.uk

Click on the study link to go to the main project page

Click on "Organisations" and then click "request involvement"

"Confirm" that a CDA is in place and tick both boxes to confirm partner involvement

Make a note to check if UHL have been added (green tick next to UHL in "Organisations"

Chase after 72 hours by emailing the EDGE administrators who own the record

Add Project Site (LRI, GH, LGH)

If PI known:
Add PI name, speciality, location of speciality

If PI not known:
Add site (LRI, GH, LGH)

Ensure the status is set appropriately as "Feasibility" or "Project Site in Set Up"

Add Teams
(tick "manage" in the box):
- UHL R&I Team
- Speciality Team

Add Study Support Teams as relevant:
- Pharmacy
- Medical Physics
- Imaging
- Laboratories
- Nuclear Medicine
- Radiation Protection
- Others as required

Add Attributes:
- Contracts
- Data flows/ GDPR
- Finance Approval
- Mandatory Category 1, 2, 3 & 4
- Software/ Hardware requirements
- Others as relevant

Add Workflows:
- Archiving Arrangements
- CMG Approval
- Confirm Process Stage 3
- Contracts Process
- Final Contracts Pre-Sign Checks
- R&I Finance Approval
- Study Staff Added
- Others as required

Add the file structure template by clicking Files>Templates>Add folders from Template>Add Template

Upload any documents from your shared drives into the relevant EDGE folder