

Vestigo Training Checklist

This checklist can provide a document to demonstrate which functionality a specific user has completed and provides a place for sign off.

Pass	FUNCTION/MODULE
	Access to Vestigo & Main Page
	How to login
	Forgot password
	Overview of the home screen – menus, alert pain, protocol search, most recent list
	Main Menu
	My Account – default facility, change password, manage/view competencies/set up
	PIN for E-Signature
	Help and Support
	Vestigo Help Center – Contacting Support, user manuals, ongoing classes
	Vestigo Verify Help Center
	Application Administration – if applicable
	<i>Client & Facility Settings</i>
	<i>Adding user accounts and assigning roles</i>
	<i>Manage roles & permissions</i>
	<i>Internal reviewers / protocol-specific user access</i>
	<i>Security settings</i>
	<i>Audit reports</i>
	Add New Protocol
	Create Protocol – NCT# and search terms, process to add new protocol
	Link to clinicaltrials.gov
	Main Protocol Tab – Overview
	Protocol Identifiers – adding and display on DARF
	Protocol Summary
	Blinded Study flag
	Local Tab
	Adding additional facilities on the protocol if needed

Pass	FUNCTION/MODULE
	Protocol details
	IRB Tracking
	Protocol Settings – remove patient initials from DARF
	Require Shipment Receipt Verification for all drug builds
	Track Inventory by Ordering Investigator
	PSN Entry instruction field
	Randomization instruction field
	Inventory instruction field
	Contacts Tab – Overview
	Adding new contact from Address book
	Add new contact to the Address Book
	Add Contacts in Bulk
	Start and Stop Dates
	Checklists Tab – General Overview
	Budget Tab – General Overview
	Billing Tab – General Overview
	Workload Tab – General Overview
	Arms Tab
	Drugs/Orders Tab
	Drug Build – associated fields to inventory tab and DARF
	Order Build – associated fields to Prescription Details
	Copy as New process
	Access Codes
	Reports Tab – Overview
	Protocol Snapshot
	Binder Coversheet
	Print Protocol Label
	Edit Protocol
	Close Out Protocol
	View Audit Trail
	Inventory Tab

Pass	FUNCTION/MODULE
	Receive Inventory
	View/Edit Inventory
	Add DARF Note
	Adjust Inventory
	Immediate Transfer
	Send out Inventory
	Cycle Count
	Generate Drug Accountability Records – review different formats
	Par and Reorder Points
	Manage Drug Returns
	Items in Patient Returns
	Items in Quarantine
	Items already destroyed
	Items returned to sponsor
	Generating a Certificate of Destruction
	Record a Witness for Destruction
	Return Report
	Patient/Subject Enrollment
	Enrolling a New Patients
	Inactivate Patients (unenroll)
	Generate Vestigo MRN#
	Dispensing
	Edit RX
	Void RX
	Copy RX
	Refill RX
	Patient Visits
	Process Returns (from within patient profile)
	Billing
	Generate Ad-Hoc Charges
	Edit/View Charges

Pass	FUNCTION/MODULE
	Protocol Documents – Overview
	Transaction Documents - Overview
	Temperature Documents - Overview
	Document Management
	Upload document via drag and drop
	Create a document
	Edit a document
	Certify a document
	Visibility Settings
	Competency Access - Overview
	Monitor Visits Tab
	Adding new monitor
	Schedule monitor visit
	Reviewing past monitor visit details
	Reports
	Protocol Reports
	Inventory Reports
	Prescription Reports
	Workload Reports
	Application Administration – User Workload
	Address Book
	Inventory Management
	Cycle Count by location – relates to Inventory by Location (Cycle Count) Report
	Drug Search
	Inventory SendOut (Multiple Protocols) – if applicable
	Shipment Receive Search – uploading shipping receipts
	Temperature Excursion
	Temperature Documents
	Protocol Management
	Competency Management
	Facility Documents

Pass	FUNCTION/MODULE
	Manage Templates (Checklist, Workload and general Vestigo)
	Monitor Visits
	Vestigo Verify - Overview
	Process Returns (bulk by RX#)
	Search Subjects & Prescriptions
	Calendar
	User Forum
	Billing Management - if applicable
	Accounts
	Manage Fees
	Billing Reports
	Billing Set up
	Record Bulk Payment
	Manage Billing Account Types
	Bulk Charge Upload
	Billing Cycle Count
	Billing Portal

The training record should include a section for the trainee's name, as well as a validation block for the signature and date of both the trainee and the person verifying the completion of the training.

User Completing Training: _____ Date: _____

Supervisor/Manager: _____ Date: _____