



BIOCLINICA[®]

SMART

SMART Portal 3.29

User Guide

Document Version 1.0





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Welcome to the SMART Portal

WebSend has been updated to be part of Bioclinica's SMART Services Suite and is now known as the SMART Portal.

The SMART Portal is Bioclinica's web-based system for communication management. Clinical sites use this Portal to access and reply to queries, upload completed forms, download documents provided by Bioclinica, and view or download submitted image files after they have completed the quality control process.

Depending on user role and trial configuration, the SMART Portal can also provide access to the SMART Submit system or the AG Mednet application to upload image files.

To learn more about SMART Submit, see:

- [SMART Submit Knowledge Base](#)

For more information on AG Mednet see:

- [FAQ](#)
- [Quick Reference](#)
- [User Manual](#)

3.29 Release Updates

- The QC status is now visible in the History tab
- Upload of forms is now restricted to PDF format only



Getting Access

Welcome Email

Bioclinica sends each new SMART Portal user a "Welcome" email with their user id and password. This welcome email contains everything you need to get started.



Notification

Welcome to Bioclinica's SMART Portal; our web-based site portal. You are participating in one or more online trial(s) that will allow your site to quickly and easily complete all imaging activities as detailed below.

The following link will take you to the SMART Portal:
<https://smart.bioclinica.com/>

Below you will find your login credentials:

Account Name: <Your Username>
Password: <Your Password>

Your credentials

Once you have successfully logged in, please select the trial you are working on.

Below is a list of the available tabs within the portal:

- TO-DO: displays a list of tasks organized by date
- SUBJECTS: displays a list of tasks by subject and allows you to access images
- QUERIES: displays a list of open queries and enables you to respond to queries
- DOCUMENTS: displays a list of documents uploaded by Bioclinica for sites to access (ex. Site Manual, Imaging Capabilities Questionnaire)
- HISTORY: displays a list of upload history and enables you to download images and attachments
- TRAINING: will re-direct you to the Smart START training portal (if applicable)
- IMAGE/Video UPLOAD: launches Electronic Image/Video Transfer platform

You will receive a separate email containing your electronic image platform credentials (if applicable).

We are committed to providing you with the highest level of customer satisfaction possible. If you have any questions or require assistance, please contact Bioclinica Customer Support:

Toll-free from the US and Canada: +1-888-ASK-BIOC (1-888-275-2462)
 Direct dial worldwide: +1-484-928-6076**
 Fax: +1-267-757-3353
 Support@bioclinica.com

Technical Support

If you've been expecting this information and it is not available to you, contact Bioclinica's help desk:

US and Canada: 1-888-ASK-BIO2
(1-888-275-2462)

International: +1-484-928-6076

Email: support@bioclinica.com

Logging In

Once you have received the welcome email, you will be able to log into the SMART Portal - <https://smart.bioclinica.com/> - and change your default password.



Sign in with your email address

[Forgot Password](#)

[Sign in](#)

[Terms of Use](#) [Privacy Policy](#)

Bioclinica helpdesk:

Phone: US and Canada: 1-888-275-2462
International: +1-484-928-6076

Email: support@bioclinica.com

1. Enter your email and password from the Welcome email.
2. Click Sign In.

If this is the first time that you are logging on, the [Change Password](#) box automatically displays.

If you have already changed your password, the [Select a Study](#) page displays.

Forgot Password

If you forget your password, click the [Forgot Password](#) on the login page, enter your email address and click **Send**.

Forgot your password?

Please enter the email address associated with your Bioclinica account. A new password will be emailed to you shortly.

[Send](#) [Cancel](#)



Changing Your Password


To ensure that your password is secure, you will be required to change your default password before you will be able to log in a second time. The Change Password screen automatically displays.





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Update Password

You must update your password because your password has expired.

 yourname@company.com

 Old password

 New password

 Confirm new password

1. Enter your email and default password.
2. Enter a new password.
The password must be at least 8 characters long and must contain at least three of the following: an upper-case letter, a lower-case letter, a number, and a symbol.
3. Re-enter the new password in the Confirm Password field.
4. Click Submit.


If you have access to multiple studies, the [Select Study](#) page displays. If not, the [TO-DO](#) page displays.

Select Study

If you have access to more than one study, or multiple sites within a study, the System displays a study selection dialog after login:



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your.name@company.com  Change Password  Logout

Welcome to Bioclinica's SMART Portal

[Submit](#) [Manage](#) [Analyze](#) [Report](#) [Transfer](#)

Please select from the following worklist items:

- DEMO-9999
- Forms - DEMO-9999 - 002
- DEMO-312-0115
- DEMO-312-0117
- Image Submission - DEMO-9999 - 001
- Site Portal - DEMO-9999 - 001
- Site Portal - DEMO-9999 - 002

1. Click the study or study/site combination you wish to work with from the list.
The [TO-DO](#) page displays.



Logout

To logout of the SMART Portal, click **Logout** in the upper right corner of the screen. The system confirms that you have successfully logged out.



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Sign out

You have successfully signed out.

Forgotten password, please contact the Bioclinica helpdesk at:

Phone: US and Canada: 1-888-275-2462
International: +1-484-928-6076

Email: support@bioclinica.com



Using the SMART Portal



Welcome, ws_user2

[Logout](#)

[Contact](#)

[Help](#)

[SMART Portal](#)

V3.21.2-Build-2020-09-09 | [TO-DO](#) | [SUBJECTS](#) | [QUERIES](#) | [QUALITY-NOTIFICATIONS](#) | [SURVEYS](#) | [DOCUMENTS](#) | [HISTORY](#) | [FORM-UPLOAD](#) | [TRAINING](#) | [IMAGE UPLOAD](#)

Link Menu

The link menu displays in the upper right corner of SMART Portal screens.



- Displays phone, fax and email information.



- Displays online help.





- Returns to the study selection dialog for the SMART Portal.

Main Menu

- [TO-DO](#) - list of tasks and processing options organized by date
- [SUBJECTS](#) - list of tasks and processing options organized by subject
- [QUERIES](#) - list of queries and processing options (Only open queries are listed by default, but there is an option to include closed queries.)
- [QUALITY NOTIFICATIONS](#) - list of image quality notifications and processing options (Similar to queries, but do not require a response.)
- [SURVEYS](#) - list of surveys and processing options (Only published surveys are listed by default, but there is an option to include All queries.)
- [DOCUMENTS](#) - list of trial and site level documents uploaded by Bioclinica and available for you to download
- [HISTORY](#) - on-screen report that displays a list of files uploaded to Bioclinica for trials for which you are authorized
- [FORM UPLOAD](#) - tool for uploading PDF forms to Bioclinica
- [TRAINING](#) - provides access to the SmartStart training site
- [IMAGE UPLOAD](#) - launches the file upload application in a separate browser tab

Screen Panels

1. Left Panel:  - selections to narrow down what is shown in the center panel - See [Working with Filters](#) for more information.
2. Center Panel: List - contains rows that can be selected for processing
3. Right Panel:  - displays data for selected row (first row selected by default)

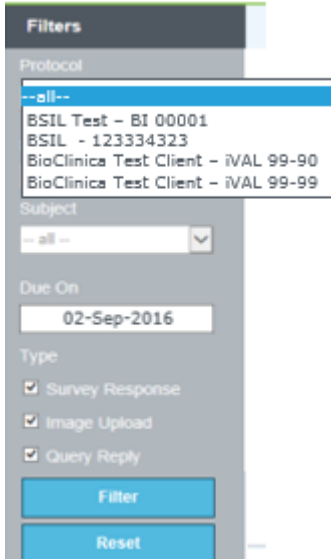
Action Icons

Action icons link to other pages for you to take a specific action. They display, where applicable, on list rows. They also display as buttons the bottom of any given list. The action buttons at the bottom may apply to the entire list (such as Export to Excel).



Filters

The Filters panel allows you to make selections to narrow down what is shown in the center panel. The parameters of the filters are depended on the columns and items that are displayed in the center panel.



Working with Filters

1. Select the parameters that you wish to use to filter the contents of the center panel.
2. When you are finished, click .
3. To reset the filters at any time, click .

Export to Excel

The Export to Excel button is available on most of the pages in the SMART Portal. This button allows you to export the displayed list to Excel.

Export to Excel



1. Click [Export to Excel](#) from any page.

A message box displays at the bottom of the page asking if you want to open or save the list.

2. Click  to open the list in Excel, click  to save the file.



Contact Information

We hope that this guide is helpful. If you have additional questions, feel free to contact us:

Address: Bioclinica, Inc.

211 Carnegie Center Drive
Princeton, NJ 08540

Phone: US and Canada: 1-888-ASK-BIO2
(1-888-275-2462)

International: +1-484-928-6076

Email: support@bioclinica.com



To-do List

The List of Tasks

The To-do list contains your imaging related tasks that are coming due or are overdue.



Note: Overdue and expedited tasks are highlighted in red and require immediate attention.



Welcome, ws_user2@biopacstest.domain | [Logout](#)

[Contact](#) | [Help](#) | [SMART Portal](#)

V3.25-Build-2020-11-19 10:00

[TO-DO](#) | [SUBJECTS](#) | [QUERIES](#) | [QUALITY-NOTIFICATIONS](#) | [SURVEYS](#) | [DOCUMENTS](#) | [HISTORY](#) | [FORM-UPLOAD](#) | [TRAINING](#) | [IMAGE UPLOAD](#)

Filters	Tip: The following tasks require your attention.					Details
Protocol	PROTOCOL	SITE	TITLE	DUE ON	ACTION	Protocol number
-- all --	Demo	AU10001	Images are missing for Subject 260103, Week 54	08-Mar-2021		Demo
	Demo	AU10001	Images are missing for Subject 260106, Week 30	04-Mar-2021		Site number 101
	Demo	AU10001	Query 10009068-Q00531 needs response.	01-Mar-2021		Subject number 55555
	Demo	AU10001	Images are missing for Subject 260104, Week 42	18-Feb-2021		Timepoint Week 5
	Demo	AU10001	Query 10009068-Q00371 needs response.	15-Feb-2021		Business modality CT
Due On	Demo	AU10001	Images are missing for Subject 260103, Week 48	25-Jan-2021		
17-Mar-2021	Demo	AU10001	Images are missing for Subject 260104, Week 36	07-Jan-2021		
Type	Demo	AU10001	Images are missing for Subject 260103, Week 42	14-Dec-2020		
<input checked="" type="checkbox"/> Survey Response	Demo	AU10001	Images are missing for Subject 260106, Week 18	10-Dec-2020		
<input checked="" type="checkbox"/> Image Upload	Demo	AU10001	Images are missing for Subject 260104, Week 30	26-Nov-2020		
<input checked="" type="checkbox"/> Query Reply	Demo	AU10001	Images are missing for Subject 260103, Week 36	02-Nov-2020		
Filter	Demo	AU10001	Images are missing for Subject 100/000/0000, Week 24	18-Jun-2018		
Reset	Demo	AU10001	Images are missing for Subject 359158022, Week 20	21-May-2018		
	Demo	AU10001	Images are missing for Subject 100/000/0000, Week 16	23-Apr-2018		

Left Panel (Filters)

To filter the list, select filters and click **Filter** button. To clear filters, click **Reset** button.

Center Panel: The List

- **Protocol** - ID or # of the protocol with which the task is associated
- **Due On** - date by which the task must be completed
- **Site** - clinical site with which the task is associated
- **Title** - description of the task
- **Action** - symbols that link to specific processing options related to the task
 - - [Upload Images](#)
 - - [Reply to Query](#)
 - - [Complete Survey](#)

Right Panel: Details

This panel displays details (some also on the row and some additional) related to the currently selected row.

List Menu (Options vary based on the selected row.)



[Export to Excel](#) - See [Export to Excel](#)



[Reply to Query](#) See [Reply to Queries](#) (available for query tasks)



[Upload Image](#) -See [Image Upload](#)



[Response To Survey](#) - See [Response to Survey](#) (available for survey tasks)



Subjects

The Subject List

The Subject list contains a list of tasks organized by subject. To add a subject, you must filter by site.

V3.25-Build-2020-11-19 10:00

TO-DO | **SUBJECTS** | QUERIES | QUALITY-NOTIFICATIONS | SURVEYS | DOCUMENTS | HISTORY | FORM-UPLOAD | TRAINING | IMAGE UPLOAD

Tip: Select and process each subject requiring your action.

Filters	Tip: Select and process each subject requiring your action.					Details
Protocol BioClinica - Demo	PROTOCOL	SITE	SUBJECT NUMBER	RANDOMIZATION DATE	ACTION	Subject Number 999992
Site 999	Demo	999	999992		✓	Subject Initials XXX
<input type="button" value="Filter"/> <input type="button" value="Reset"/>	Demo	999	999994		✓	Secondary ID N/A
	Demo	999	999999		✓	Date Of Birth XX-XX-XXXX
	Demo	999	100/000/0000	01-Jan-2018		Randomization Date N/A
	Demo	999	999991		✓	Enrollment Date N/A
	Demo	999	123456		✓	Discontinuation Date N/A
						Discontinuation Reason N/A
						Status Active

Left Panel (Filters)

To filter the list, select filters and click **Filter**. To clear filters, click **Reset**.

Center Panel: The List

- **Protocol** - ID or # of the protocol with which the task is associated
- **Site** - clinical site with which the task is associated
- **Subject Number** - ID or # of the trial subject
- **Randomization Date** - date on which the subject was randomized for the study
- **Action** - processing symbols and the completed task symbol
 - - [Upload Images](#)
 - - [View Query](#)
 - - There are no outstanding items for this subject

Right Panel: Details

This panel displays details (some also on the row and some additional) related to the currently selected row.

List Menu (Options vary based on the selected row.)



Export to Excel - See [Export to Excel](#)



Upload Image - See [Image Upload](#)



View Image List - See [View Image List](#)



View Query - See [View Query](#)



Add Subject - *displays ONLY if a protocol and site have been selected* See [Add Subject](#)



View Queries - See [Query List](#)



Add a Subject

The Add Subject page allows you to add new subjects to the protocol.

Tip: Add new study subject information.

▼ Add Subject Information

Protocol: **BioClinica Test Client - BioDemo17**

Site: **N/A**

Subject Number:

Subject Initials: (First/Middle/Last Initial; if no middle initial, blank out the middle box.)

Visit Schedule: ▼

1. **Type** the subject number (one number per box).
2. **Type** the First/Middle/Last Initials of the subject. If the subject has no middle initial leave the middle box blank.
3. **Select** the Visit Schedule.

4. Click  **Add**.

The subject is added to the list.



Subject Image List



Welcome, ws_user2@biopacstest.domain [Logout](#)

[Contact](#) [Help](#) [SMART Portal](#)

V3.25-Bulk-2020-11-19 10:00

TO-DO | **SUBJECTS** | QUERIES | QUALITY-NOTIFICATIONS | SURVEYS | DOCUMENTS | HISTORY | FORM-UPLOAD | TRAINING | IMAGE UPLOAD

Subjects	Tip: Select subjects to view and/or process their images.			Details
1234567				Timepoint Name Week 15
359158034AB	SITE NUMBER	SUBJECT NUMBER	ACTION	Business modality MR
359158022	101	359158022EE		Expected sequence name (Unknown) Locator
359158034s	101	359158022EE		Study date 13-Aug-2013
55555	101	359158022EE		Received date 25-Oct-2013
359201015				
359349008				
42352				
359158022EE				



Left Panel (Subject)

Click one of the other Subject Numbers listed to display the image list for the selected subject.

Center Panel: The List

- **Site Number** - clinical site with which the subject is associated
- **Subject Number** - the current subject number
- **Action** - symbols that link to specific processing options related to the images
 - - [View eDTF](#)
 - - [View Sequence](#)

Right Panel: Details

This panel displays details (some also on the row and some additional) related to the currently selected row.

List Menu (Options vary based on the selected row.)



Export to Excel - See [Export to Excel](#)



View Sequence - See [View Sequence](#)



View eDTF - See [View eDTF](#)





Upload Image -See [Image Upload](#)


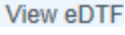


View eDTF



The View eDTF button and icon allow you to view the eDTFs created when the images were uploaded.

1. **Select** the row in the Subject Image List and **click** either  or **View eDTF** .

The View eDTF page displays with the file or files associated with the image upload.

2. **Highlight** a row and **click**  **View eDTF** .



The eDTF displays.

3. **Click**  to save the file or **click**  to print the eDTF.

4. When you are finished, **click** .

View Sequence


The View Sequence button and icon allow you to view the sequences that were uploaded.

1. **Select** the row in the Subject Image List and **click** either  or **View Sequence** .

The Image Viewer page displays with the thumbnail of the image in the left pane and the sequence grid on the right.

2. **Double-click** the thumbnail you wish to view.

The sequence displays in the grid.

3. **Click**  to display a single image in the grid.

The thumbnail panel expands and displays all the images in the sequence. The image displayed in the grid is highlighted in green in the thumbnail panel.

4. **Double-click** a thumbnail to change to another image.


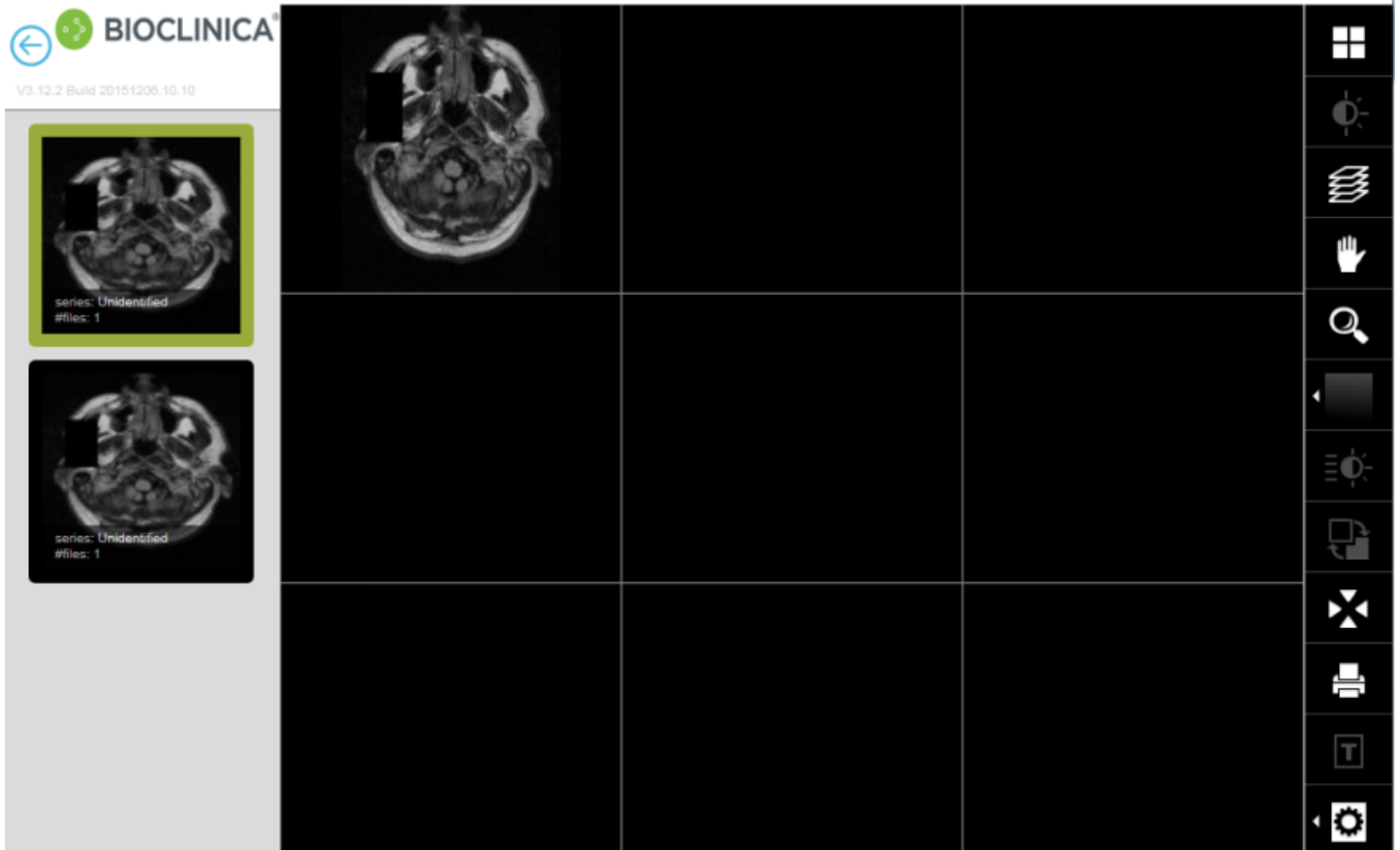
 **Note:** For more grid toolbar instructions, see [Image Grid Toolbar](#).



Image Grid



The left panel displays a thumbnail for each sequence. By default, the first (in this case only) sequence is selected.

Each image within the selected sequence is displayed within a square on the center panel.

The narrow panel to the right contains the toolbar for working with the images. (See next page for details.)



The Image Grid Toolbar

Icon	Description
	Display Mode enables you to toggle between showing all sequences and showing only the currently selected image within the sequence.
	Window/Level is available for a selected image in any of the available panels. When active, you can hold the left mouse button and drag to change the amount of contrast.
	Stacking, in a virtual sense, places one image (slice) beneath the next so that you can scroll back and forth through the slices (to scroll, use the left mouse button and drag).
	Pan allows you to move the entire image within the center panel. Hold the middle mouse button and shift key and drag in any direction.
	Zoom allows you to magnify or shrink the image. Hold the middle mouse button; drag up to magnify and down to shrink.
	Color Table brings up a sub-menu of color schemes for you to apply to the image.
	Choosing gray scale brings up a different sub-menu.
	Predefined Window Level - displays a sub-menu where you can select preselected window/level adjustments to view the type of tissue in the image.
	Invert enables you to toggle between a black background with a lighter foreground and a white background with a darker foreground.
	Reset puts the image back to its original state before you used any controls.
	Print enables you to print the image or sequence of images.
	Text Overlay - This option is only available on any image that is selected. It enables you to toggle between viewing and not viewing image information text on an overlay.
	Options - This option is only available when one image is selected. It brings up a sub-menu to select the number of columns to show in the grid.



Queries

This page lists queries between your site and Bioclinica. Initially, the list excludes closed queries. An option on the Filters panel enables you to include closed queries.

Welcome, ws_user2@biopacstest.domain | [Logout](#)
[Contact](#) [Help](#) [SMART Portal](#)

V3.24.3 Build 2020-06-11 10:00

[TO-DO](#) | [SUBJECTS](#) | [QUERIES](#) | [QUALITY-NOTIFICATIONS](#) | [SURVEYS](#) | [DOCUMENTS](#) | [HISTORY](#) | [FORM-UPLOAD](#) | [TRAINING](#) | [IMAGE UPLOAD](#)

Tip: View query list; select row icon to view query detail.

Filters	Table Headers							Details
Protocol	PROTOCOL	SITE	SUBJECT	STATUS	DUE DATE	RESCAN	ACTION	Site Name
BioClinica - Demo	Demo	101	1234567	Response Review Pending	29-Mar-2014			Newtown Radiology
Site	Demo	101	55555	Response Review Pending	02-Aug-2014			Type
101	Demo	101	55555	Response Review Pending	02-Aug-2014			Late time point
Subject	Demo	101	101	Response Review Pending	16-Mar-2016			Timepoint Type Name
-- all --	Demo	101	359158022EE	Response Review Pending	09-Apr-2016			Week 20
Timepoint	Demo	101	101	Response Review Pending	13-Apr-2016			Study Date
-- all --	Demo	101	359158022EE	Response Review Pending	05-May-2016			N/A
Study	Demo	101	101	Sent	18-May-2016			Image Type
-- all --	Demo	101	359158022EE	Response Review Pending	09-Jun-2016			N/A
<input type="checkbox"/> Include Closed	Demo	101	101	Sent	22-Jun-2016			Creation Date
Filter	Demo	101	101	Sent	27-Jul-2016			14-Mar-2014
Reset	Demo	101	359158022EE	Sent	20-Aug-2016			Sequence Name
	Demo	101	101-002-019	Response Review Pending	28-Oct-2017			Unidentified
	Demo	101	101-002-019	Response Review Pending	28-Oct-2017			Sequence Modality
	Demo	101	359158022	Response Review Pending	20-Jun-2018			N/A

Left Panel (Filters)

To filter the list, select filters and click **Filter**. To clear filters, click **Reset**.

Center Panel: The List

- **Protocol** - ID or # of the protocol with which the query is associated
- **Site** - clinical site with which the query is associated
- **Subject** - ID or # of the trial subject
- **Status** - query status which can be any of the following:
 - Sent - The query has been sent.
 - Response Review Pending - The query response has been submitted and needs to be reviewed. Once Bioclinica's Core Lab has closed the query, the status changes to "Closed."
 - Overdue - The query response is overdue.
 - Expired - The date by which a response was due has passed without a response having been submitted.
 - Closed - The query response has been reviewed and accepted by Bioclinica.
- **Due Date** - date by which the query response is expected
- **Rescan** - used to indicate that the query is either requesting rescans of images or notifying you that Bioclinica has received the rescanned images
- **Action** - symbols that link to specific processing options related to the query
 - - [Upload Images](#)
 - - [Query Details](#)



Right Panel: Details

This panel displays details (some also on the row and some additional) related to the currently selected row.

List Menu (Options vary based on the selected row.)



Export to Excel - See [Export to Excel](#)



Export Query to PDF - See [Export Query](#)



Upload Image - See [Image Upload](#)



Reply to Query - See [Reply to Queries](#) (option available if no response has yet been submitted for the selected query)



View Query - See [View Queries](#) (option available if a response has been submitted for the selected query)

Export Query

The Export Query to PDF button allows you to download the query details in report format.



1. Display query details and click **Export Query to PDF**

The report is generated and a message displays on the bottom of the page asking if you want to open or save the report.

2. Click **Open** to open the report in a PDF viewer.

3. When you are finished, click **← Queries**.



Query Details

The query form allows you to view the query details. If the site has already responded to the query, the query is in view only mode. If no response has been given, you can reply to the query.

Left Panel (Subject)


Click one of the other queries for the given site and subject.

Center Panel: Query Information


The query information is broken down into the following sections

- **Context Information** -lists the site, subject number, time point, study date and image type.
- **Query Information** - lists the details of the query
- **Query Reply** - lists any reply to the query

List Menu (Options vary based on query status)


 **Export Query to PDF** - exports the selected query to a PDF document and brings up a set of Save/Open options at the bottom of the list

 **Reply to Query** - See [Reply to Queries](#) .

 **Submit** - Submits the query response.



View Queries

1. Scroll through the query.
2. Click  **Queries** to return to the Queries list.

Reply to Queries

1. Enter the reply in the text area provided.



2. Click **Submit**.

This sends the response to Bioclinica and sets the status to Response Review Pending.

3. Click  **Queries** to return to the Queries list.



Quality Notifications

This page lists image quality notifications generated for your site. These are displayed in the same way as queries, but no response is expected from the site.

V3.20.0-Build-2016-11-05 12:30

TO-DO | SUBJECTS | QUERIES | **QUALITY-NOTIFICATIONS** | SURVEYS | DOCUMENTS | HISTORY | FORM-UPLOAD | TRAINING | IMAGE UPLOAD

Tip: View quality notification list, select row icon to view quality notification detail.

PROTOCOL	SITE	SUBJECT	TIMEPOINT	TYPE	DATE	DETAILS
Demo	999	F22	Week 8	Image Quality	30-Jun-2016	
Demo	999	Q 22	Week 16	Image Quality	27-Jun-2016	
Demo	999			Image Quality	22-Feb-2016	
Demo	999	00001	Baseline	Image Quality	12-Jan-2015	

Filters

Protocol
BioClinica Test Client - ▾

Site
999 ▾

Subject
-- all -- ▾

Timepoint
-- all -- ▾

Study
-- all -- ▾

[Filter](#)

[Reset](#)

Details

Site Name
999

Type
Image Quality

Timepoint Type Name
Week 8

Study Date
30-Jun-2016

Image Type
MR

Creation Date
30-Jun-2016

Sequence Name
Unidentified

Sequence Modality
MR

Description
Anatomy outside field of v...

Export to Excel

View Quality Notification

Export to PDF

Left Panel (Filters)

To filter the list, select filters and **click Filter**. To clear filters, **click Reset**.

Center Panel: The List

- **Protocol** - ID or # of the protocol with which the quality notification is associated
- **Site** - clinical site with which the quality notification is associated
- **Subject** - ID or # of the trial subject
- **Timepoint** - timepoint with which the quality notification is associated
- **Date** - date the quality notification was generated
- **Details** - symbols that link to additional details for the quality notification
 - - [Quality Notification Details](#)

Right Panel: Details

This panel displays details (some also on the row and some additional) related to the currently selected row.

List Menu



Export to Excel - See [Export to Excel](#)



View Quality Notification

- See [Quality Notification Details](#)



Export to PDF

- See [Export Quality Notification](#)



Export Quality Notification

The Export to PDF button allows you to download the quality notification details in report format.



Export to PDF

1. Display query details and click

The report is generated and a message displays on the bottom of the page asking if you want to open or save the report.

2. Click  to open the report in a PDF viewer.

3. When you are finished, click



Quality-Notifications



Quality Notification Details

The quality notification form allows you to view the full details for the quality notification. Unlike the query form, it is not possible to reply to a quality notification.

← **Quality-Notifications** Tip: View quality notification context, details and export.

Subject is Eligible	▼ Context Information	
Missing Unique Subject Id...	Site name: 999	Study date: 30-Jun-2016
Inconsistent Parameters ...	Subject number: F22	Image Type: MR
Anatomy outside field of v...	Timepoint: Week 8	
Subject is Eligible	▼ Quality Notification Information	
Anatomy outside field of v...	Quality Notification ID: 06423-Q0177	Creation Date: 30-Jun-2016
Subject is Eligible	Quality Notification Type: Image Quality	Sequence Name: Unidentified
Incorrect Matrix : This is a...	Timepoint Type Name: Week 8	Sequence Modality: MR
Incorrect Matrix	Description	
Phantom Discrepancy	Anatomy outside field of view.	
Exam submitted will not b...	Suggested Resolution: No response required. For future submissions, please refer to the imaging guidelines for acquisition parameters.	

Export to PDF

Left Panel

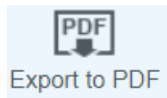
Click one of the other quality notifications listed with the current filter selections.

Center Panel: Quality Notification Information

The query information is broken down into the following sections

- **Context Information** -lists the site, subject number, time point, study date and image type.
- **Quality Notification Information** - lists the details pertaining to the notification

List Menu



Export to PDF - exports the selected quality notification to a PDF document and brings up a set of Save/Open options at the bottom of the list

View Quality Notification

1. Scroll through the query.
2. Click ← Quality-Notifications to return to the Quality Notifications list.



Surveys

The Survey List

If enabled for your protocol, this page will list surveys created by Bioclinica. The list initially includes only published surveys. The Status filter includes an option to list all surveys.

V3.20.0-Build-2018-11-05.12.30

TO-DO | SUBJECTS | QUERIES | QUALITY-NOTIFICATIONS | **SURVEYS** | DOCUMENTS | HISTORY | FORM-UPLOAD | TRAINING | IMAGE UPLOAD

Tip: Select surveys requiring your action.

CLIENT NAME	TITLE	STATUS	DUE ON	ACTION
Demo	999 - 999	Re Published	11-Mar-2014	<input type="checkbox"/> <input checked="" type="checkbox"/>
Demo	999 - 999	Re Published	07-Mar-2016	<input type="checkbox"/> <input checked="" type="checkbox"/>
Demo	999 - 999	Re Published	15-Mar-2016	<input type="checkbox"/> <input checked="" type="checkbox"/>

SURVEYS |

Export to Excel
 Answer Survey
 View (ReadOnly)

Details

Client
BioClinica Test Client

Protocol
BioClinica Test

Project Site Number
999

Project Site Name
999

Status
Re Published

Survey Due Date
11-Mar-2014

Left Panel (Filters)

To filter the list, select filters and click **Filter**. To clear filters, click **Reset**.

Center Panel: The List

- **Client Name** - name of Bioclinica's client on whose behalf the survey was generated
- **Title** - Title of the survey
- **Status** - survey status which can be any of the following:
 - Published - The survey is available to be completed.
 - Answered - The survey has been answered (completed) by the site and requires review by Bioclinica.
 - Approved - The survey has been answered by the site and has been approved by Bioclinica.
 - Denied - The survey has been answered by the site and has been denied by Bioclinica
 - RePublished - The survey has been republished and needs to be answered by the site.
- **Due On** - date by which the answered survey is expected by Bioclinica
- **Action** - symbols that link to specific processing options related to the query
 - - [Answer Survey](#) - displays the survey form in edit mode (option only available for surveys with a status of Published or Republished)
 - - [View Survey](#) - displays the survey in view only mode

Right Panel: Details

This panel displays details (some also on the row and some additional) related to the currently selected row.

List Menu (Options vary based on the selected row.)

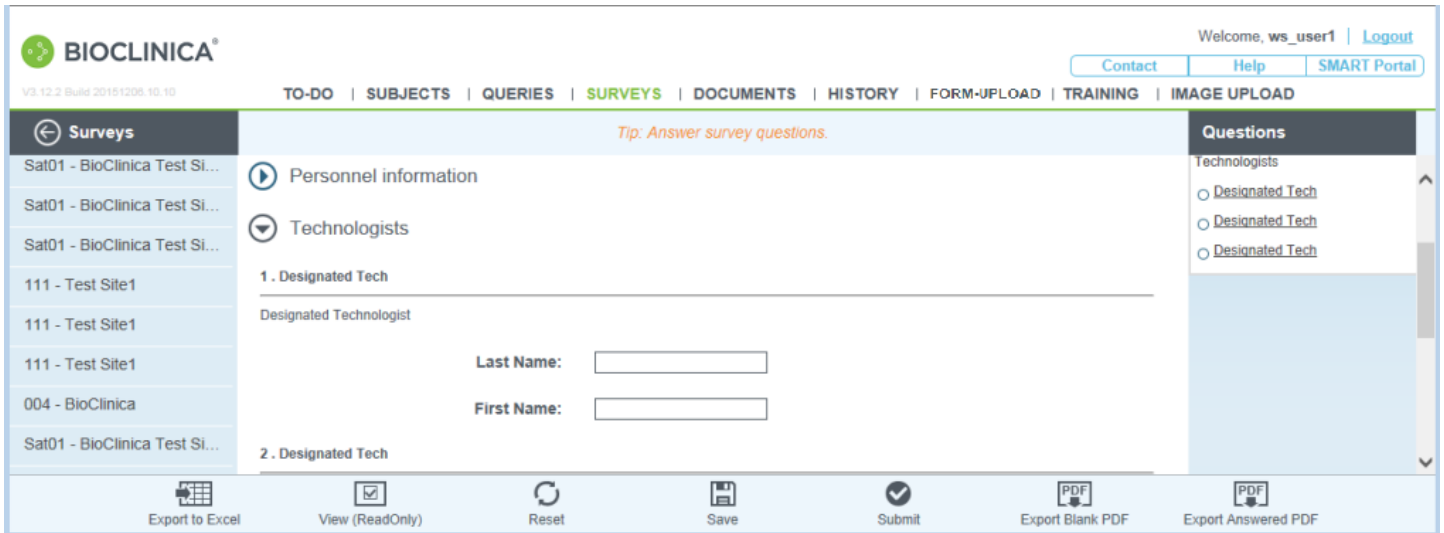
Export to Excel - See [Export to Excel](#)

Answer Survey - See [Answer Survey](#)

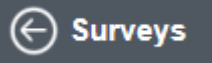
View (ReadOnly) - See [View Survey](#)



Survey Form



Left Panel (Surveys)



- allows you to go back to the Survey List.

Center Panel: Survey Form

The query information is broken down into the following sections

- **Context Information** -lists the site, time point, study date and image type.
- **Query Information** - lists the details of the query
- **Query Reply** - lists any reply to the query

Right Panel (Questions)

Links to all the questions that need to be answered in the survey.

List Menu (Options vary based on survey status)



Export to Excel - See [Export to Excel](#)



View (ReadOnly) - See [View Survey](#)



Reset - resets the survey to the last save.



Save - saves the survey.




Submit - submits the survey.





Export Blank PDF - See [Export Blank PDF](#)




View a Survey

1. Scroll through the survey.
2. Click  to return to the Survey list.

Answer a Survey


1. Scroll through the survey.
2. Answer each question.
3. You can click  at any time to save your progress.
4. When you are finished, click .

 **Note:** A red error message displays next to a required answer that has been left blank.


5. Click  to return to the Survey list.

Export Blank PDF

The Export a Blank PDF button allows you to download a blank survey (no answers).

1. Display Survey Form and click .

The survey is generated and a message displays on the bottom of the page asking if you want to open or save the survey.

2. Click Open to open the survey in a PDF viewer.
3. When you are finished, click .



Documents

The Documents list contains files that Bioclinica has uploaded to the SMART Portal for one, some or all sites within a given trial. From the Documents list, site users can download selected documents.

Filters

Protocol: BioClinica Test Client -

Site: -- all --

Filter

Reset

Tip: You can download documents here.

CLIENT NAME	PROTOCOL NUMBER	SITE NUMBER	DESCRIPTION	FILE NAME	DATETIME STAMP	ACTION
BioClinica Test...	ABC12345	003 004	word doc- site 003, 004	TEST.doc	29-Apr-2015	
BioClinica Test...	ABC12345	001	File upload to site 001 - Excel	TEST.xls	29-Apr-2015	

Download

Left Panel (Filters)

To filter the list, select filters and click **Filter**. To clear filters, click **Reset** button.

Center Panel: The List

- **Client Name** - name of Bioclinica's client on whose behalf the document was uploaded
- **Protocol Number** - ID or # of the protocol with which the document is associated
- **Site number** - clinical site
- **Description** of the document
- **File name** - file name including any extension (file type)
- **Datetime stamp**
- **Action** - symbols that link to specific processing options related to the task
 - - [New Download](#)
 - - [Download](#)

List Menu Options

- **Download** - enables you to download the selected document
- **New Download** - enables you to download a selected document that is new.

Download a Document

1. Highlight the document you wish to download and click , , **New Download** or **Download**.

A message box displays at the bottom of the page asking if you want to open or save the document.

2. Click to open the document, or click to save the file.



History

The History screen shows a list of prior uploads. Options to re-access previously uploaded data are available.

Welcome, v... | [Logout](#)

[Contact](#) | [Help](#) | [SMART Portal](#)

V3.29-Build-2022-07-26.12.30 **TO-DO** | **SUBJECTS** | **QUERIES** | **QUALITY-NOTIFICATIONS** | **DOCUMENTS** | **HISTORY** | **FORM-UPLOAD** | **TRAINING** | **IMAGE UPLOAD**

CLARIO.

Tip: To download images, click download icon on selected row.

Quick Subject Search:

Date Last Refreshed: 16-Sep-2022

PROTOCOL	SITE NUMBER	SUBJECT NU...	EXAM DATE	UPLOAD DATE	QC STATUS	ACTION
BioDemo17	999	999 2200	09-Mar-2009	06-Jun-2016		
BioDemo17	999	999 2200	01-Jun-2016	06-Jun-2016		
BioDemo17	999	999 2200	02-Jun-2016	06-Jun-2016		
BioDemo17	999	999 2200	03-Jun-2016	06-Jun-2016		
BioDemo17	999	999 1200	12-May-2016	11-May-2016		
BioDemo17	999	999 1200	13-May-2009	11-May-2016		
BioDemo17	999	999 1200	03-May-2016	11-May-2016		
BioDemo17	999	999 1200	02-May-2016	11-May-2016		
BioDemo17	999	999-1000	09-Mar-2009	22-Mar-2017		

Filters

Protocol: BioClinica Test Client - v

Site: 999

Subject: -- all --

Timepoint: -- all --

Modality: -- all --

Details

Timepoint: Week 8 (Default Schedule)

Business Modality: CT

Status: Received

Sequence count: 1

Delivery Method: SMART Portal

Processing Status: **New**

Left Panel (Filters)

To filter the list, select filters and click Filter. To clear filters, click Reset.

Center Panel: The History List

Subject Search

1. Enter all or part of the subject Id.
2. Press the Enter key.

The search goes across all authorized protocols to find matches.

Note: A search for 001 returns 001 as well as 117001 as matches. The search is done for the string, not for a number.

- **Protocol** - ID or # of the protocol with which the upload is associated
- **Site** - clinical site with which the upload is associated
- **Subject Number** - ID or # of the trial subject
- **Exam Date** - Date the exam.
- **Upload Date** -Date the files were uploaded.
- **QC Status** - Status of the data QC (pending, passed or failed)
- **Action** - symbols that link to specific processing options related to the item
 - - [View eDTF](#)
 - - [Download Image](#)
 - - [Attachments](#)
 - - loads the images into the [Image Grid](#).

Delivery Method

-- all --

Filter

Reset

Right Panel: Details

This panel displays details (some also on the row and some additional) related to the currently selected row. You can also [set the processing status](#) of the Upload if configured in BioPACS.

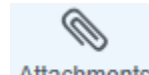
List Menu (Options vary based on the selected row.)

Export to Excel - See [Export to Excel](#)

View eDTF- See [View eDTF](#)



Download Image - See [Download Image](#)



Attachments - See [Attachments](#) (available only for protocols allowing attachments)



Visualize Study - loads the images into the [Image Grid](#).

Set Processing Status

The details panel of the History screen allows you to set the processing status if one has been configured for the project in BioPACS.

1. **Select** the row in the Upload History List.

The Processing Status displays in the Details panel.

2. **Select** a new status from the drop-down.

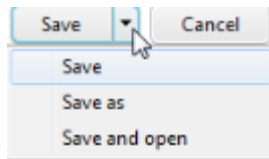
Download Image

Images that have been uploaded to Bioclinica can be viewed and downloaded after the image QC process has been completed. The images are downloaded in their original format. *(If the images needed to be wrapped before being added to the SMART database, they are unwrapped before they are downloaded back to your machine).*

1. **Select** the row with the upload that you want to download.

2. Either click  or [Download Image](#).

An Open/Save menu displays at the bottom of the list.




3. Click ; then click .

A window listing the downloaded files is displayed.

The files are downloaded to a folder named using the following convention:

TrialName_Initials_SubjectNumber_TimePointType_ExamDate

 **Notes:**



- The downloaded directory is automatically zipped and must be unzipped to access files.
- All images are downloaded in their original format.
- The subject initials displays as XXX when configured as non-display for the trial.

If configured for your trial and user account, the reader annotation files will be included in the downloaded directory. Annotations will be provided in separate folders for Reader 1, Reader 2, etc.


View eDTF

The View eDTF button and icon allow you to access the eDTFs created when the images were uploaded.





1. Select the row in the Upload History List and click either  or  View eDTF.

The View eDTF page displays with the file or files associated with the image upload.

2. Highlight a row and click  View eDTF

The eDTF displays.

3. Click  to save the file or click  to print the eDTF.



Attachments

The attachment screen allows you add new attachments and download existing attachments.

TO-DO | SUBJECTS | QUERIES | SURVEYS | DOCUMENTS | **HISTORY** | FORM-UPLOAD | TRAINING | IMAGE UPLOAD

Tip: view, download and add attachments

<input type="checkbox"/>	TYPE	FILE NAME	DESCRIPTION	UPLOAD USER	UPLOAD DATE
<input type="checkbox"/>		09731sample_doc.docx			05-Sep-2016

Add Attachments

Browse...

Download Attachment Upload Attachment

Download Attachment

Attachments that were added to an image upload can be viewed and downloaded.

1. **Select** the attachment you want to download from the upper table.



2. Click **Download Attachment**

A message box displays at the bottom of the page asking if you want to open or save the attachment.

3. Click **Open** to open the document, or click **Save** to save the file.

The attachment file is listed in a window.

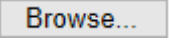
4. **Double-Click** the file name to open the file for viewing and/or saving to a location other than the Downloads folder.



Note: If you download a single document, that document type is downloaded. If you download multiple documents or images, a single .zip file is downloaded.



Add Attachments

1. Click .

A browser box displays allowing you to search for the attachment.

2. Select the Attachment and click .

The attachment displays in the lower table.

3. Click in the BCSP column if you want the attachment to be associated with the baseline time point.

If you check the box, the document is automatically inserted in baseline time point, if you don't check the box, the attachment is inserted as general document.

4. Type a description in the Description field.



5. Click **Upload Attachment**.

The attachment file displays in the upper table.

5. Click  to return to the History page.



Form Upload

The Form Upload screen allows you to upload a document to Bioclinica for a specific subject and timepoint. Only PDF files are accepted.

Welcome, v... | [Logout](#)

[Contact](#) [Help](#) [SMART Portal](#)

V3.29-Build-2022-07-26.12.30 **TO-DO** | **SUBJECTS** | **QUERIES** | **QUALITY-NOTIFICATIONS** | **DOCUMENTS** | **HISTORY** | **FORM-UPLOAD** | **TRAINING** | **IMAGE UPLOAD**

CLARIO.

Tip: Select a file to upload. Only PDF files are supported

Filters

Protocol
BioClinica Test Client - ▾

Site
1104 ▾

Form Type
-- all -- ▾

Subject
-- all -- ▾

Timepoint
-- all -- ▾

Exam Date

[Reset](#)

Upload Form

[Choose File](#) No file chosen

File Name	Description
-----------	-------------

Uploading a Form

1. **Select** the Protocol and Site, using the filters in the left panel.
2. **Select** a Form Type from the pull-down list. The following form types may be permitted, depending on the protocol:
 - DTF
 - Clinical Data
 - Biopsy Report
 - Phantom Data
 - BCSP
 - ICQ
 - Site Questionnaire
 - Certificate

Additional custom types may be presented, depending on the protocol; custom types will prompt you to **select** an exam date.

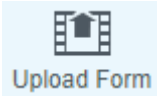
3. **Select** the Subject ID and Timepoint from the pull-down lists.

4. Click [Choose File](#)

A menu opens to allow you to select a file from your hard drive. Only PDF format is accepted by default, your file may need to be converted before being uploaded.

5. **Select** the file to be uploaded. The file name is displayed under the **File Name** heading.

The Upload Form icon is enabled at the bottom of the screen



6. Click

Upload Form

A confirmation message is displayed

BCSP Form Upload

When uploading a BCSP form, the Baseline timepoint is automatically selected.

ICQ Form Upload

When uploading an ICQ form, you will only be permitted to select a designated Qualification subject and timepoint configured for the protocol.

Site Questionnaire Form Upload

When uploading a Site Questionnaire form, you will only be permitted to select a designated Site Assessment subject and timepoint configured for the protocol.



Training



Welcome, A, to Bioclinica's SMART START!



BIOCLINICA®



Helpful Hints

For best results:

- Use Google Chrome
- Enable Site Firewalls for training
- Enable Site Pop ups for training

Important! Please Read!

Please view our [Terms of Use](#) and our [Privacy Policy](#).

On-line trainings: If your study offers on-line training, you will see available courses in the Featured Training box on this page. There may be different trainings based on your role within the study. Only take the training appropriate for your study and role.

Featured Training

[Smart Portal Training Course](#)

Training Certificates

To **print** your training certificate, [click](#) to view your transcript.

Once in your transcript, click on the **Completed** tab to view all of your completed trainings.

To **print your certificate** for a course, click on the name of the course and then the **Print Certificate** link.

If you encounter any problems, please contact the Bioclinica Help Desk:
 Phone: 888-275-2462 (toll free in US and Canada)
 E-mail: helpdesk@bioclinica.com

Your Transcript

	Type	Status	Action
Site Initiation Training v.1.0	Online Class	In Progress	Launch

The Training Tab gives you access to the training necessary for your specific protocol or for general SMART Portal training.

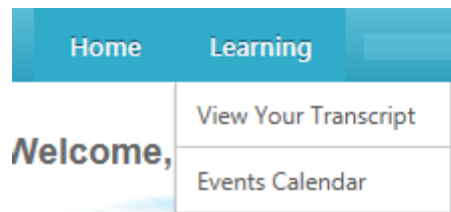
Featured Training

1. Click the course name of the training you need to take in the Featured Training pane.
2. Click Launch to start your training.

Note: Once you launch your training, it will open in a different window. This window must be closed at the completion of your course in order for the Smart START site to be updated with your progress.

Note: You need to enable pop-ups for this website in order to view the training. If you have any questions about how to do this, please contact our Help Desk at 888-ASK-BIO2 (888-275-2462).

3. If you stop the training before it is finished, you can later find the course on your Transcript. You can access all active trainings directly on the home page or you can access you full transcription by clicking the Learning tab at the top of your screen, and then the View Your Transcript link.





SMART Portal Training

1. Click the Learning tab at the top of your screen and then select Events Calendar.

The Events Calendar displays all of the available live training sessions that you may select from to attend.

2. Click the course name for the event you want to register for.

The Training Details page displays with all the details of the course.

3. Click Request to register for this course.

The course displays on your transcript with a registered status as well as on your home page in the Your Transcript pane.

4. To add the course to your Outlook calendar.

- a. Click Course name from your transcript.

The Course details screen displays.

- b. Click Add to Calendar.

The event is added to your calendar.



Image Upload

Overview

For users who are approved to submit images to Bioclinica, the IMAGE UPLOAD tab will redirect to the SMART Submit system or the AG Mednet upload client per trial configuration.

[TO-DO](#) | [SUBJECTS](#) | [QUERIES](#) | [QUALITY-NOTIFICATIONS](#) | [SURVEYS](#) | [DOCUMENTS](#) | [HISTORY](#) | [FORM-UPLOAD](#) | [TRAINING](#) | **IMAGE UPLOAD**

To learn more about SMART Submit, see:

- [SMART Submit Knowledge Base](#)

For more information on AG Mednet see:

- [FAQ](#)
- [Quick Reference](#)
- [User Manual](#)