

SELF-GUIDED PRACTICE WORKBOOK [N88]
CST Transformational Learning

WORKBOOK TITLE:

Clinical Research (Nurses and Coordinators)

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SELF-GUIDED PRACTICE WORKBOOK

Duration	8 hours
Before getting started	<ul style="list-style-type: none">  Sign the attendance roster (this will ensure you get paid to attend the session)  Put your cell phones on silent mode
Session Expectations	<ul style="list-style-type: none">  This is a self-paced learning session  A 30 min break time will be provided. You can take this break at any time during the session  The workbook provides a compilation of different scenarios that are applicable to your work setting  Work through different learning activities at your own pace
Key Learning Review	<ul style="list-style-type: none">  At the end of the session, you will be required to complete a Key Learning Review  This will involve completion of some specific activities that you have had an opportunity to practice through the scenarios.

Learning Domain

You will be using the learning domain to complete activities in this workbook. The learning domain has been designed to match the actual Clinical Information System (CIS) as close as possible.

Please note:

-  Scenarios and their activities demonstrate the CIS functionality not the actual workflow
-  An attempt has been made to ensure scenarios are as clinically accurate as possible
-  Some clinical scenario details have been simplified for training purposes
-  Some screenshots may not be identical to what is seen on your screen and should be used for reference purposes only
-  Follow steps to be able to complete all activities
-  If you have trouble following the steps, immediately raise your hand for assistance to use classroom time efficiently
-  Ask for assistance whenever needed

■ PATIENT SCENARIO 1 – Navigating PowerChart as a Research Nurse

Learning Objectives

At the end of this Scenario, you will be able to:

- Navigate the Tracking Shell

BACKGROUND

When you first login to PowerChart, the landing page for the Ambulatory Oncology Nurse, including Research Nurses, is the Ambulatory Organizer. The **Ambulatory Organizer** allows you to:

- View a snapshot of the current day's appointments for the selected resource
- View the status of the patient (e.g. confirmed, checked in, roomed and no show)
- View a long-term calendar of appointments
- Provides a framework to organize work at the day, week, or month level

When the patient arrives in the Chemotherapy Clinic, the Clerk will check the patient in using the Schedule Appointment Book application which will update the Patient's status in the Ambulatory Organizer and place the patient on the Tracking Shell.

The Tracking Shell serves as the desktop for linking health care professionals to vital patient and department information. Events can be added and removed to communicate patient status during their treatment.

There are many ways that you can access your patient's chart from both Ambulatory Organizer and the Tracking Shell.

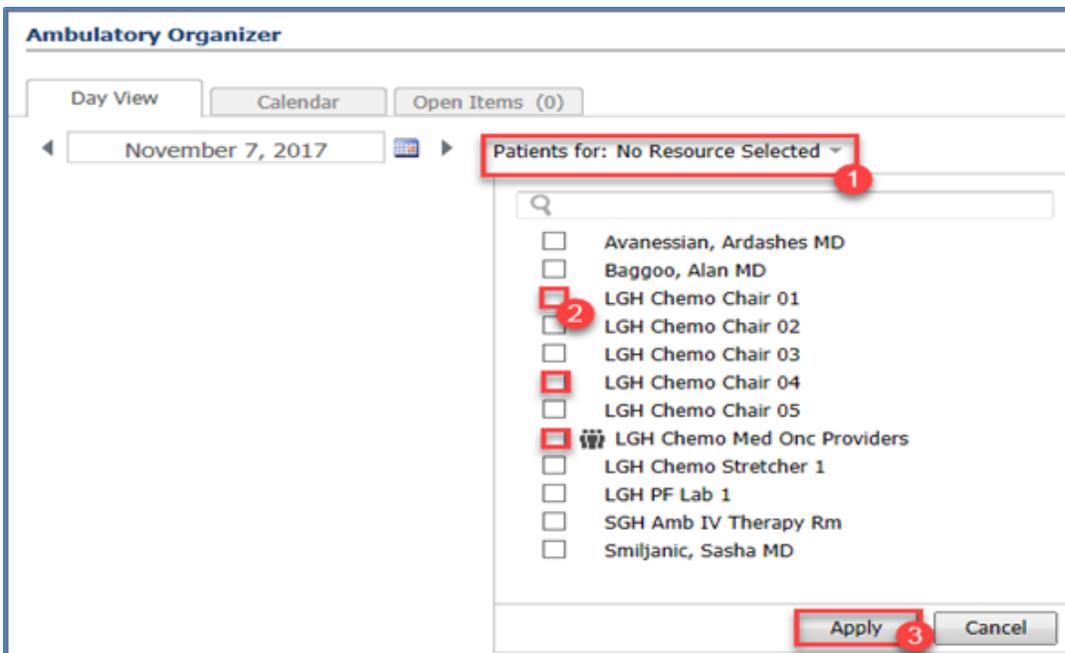
Note: A schedule for the Research Nurse Coordinator has not been created within the CIS; you will only find your patients on the Ambulatory Organizer or Tracking Shell if you are seeing them during their visit with a provider or if they are coming for an infusion appointment.

Activity 1.1 – Ambulatory Organizer

Throughout the Clinical Transformation System (CIS) a hint to remember to help you navigate is ‘**Hover to Discover.**’

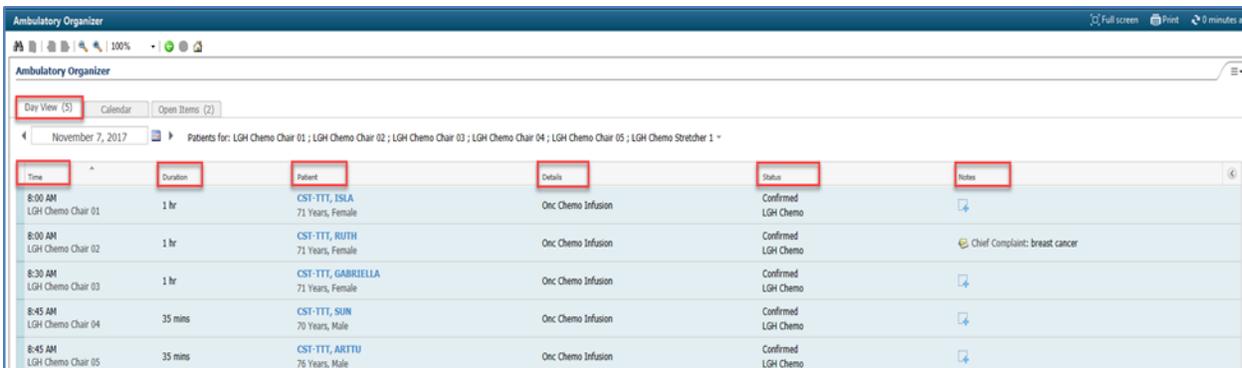
1 The **Ambulatory Organizer** allows the RN to select the appropriate resource, displays scheduled appointments, and provides staff with a framework to organize workflows at the day, week, or month level.

1. Click the down arrow beside **Patients for: No Resource Selected.**
2. Select the desired resource(s), or use the search window if not appearing in your recently used, set your resource to **LGH Chemo Chairs/Stretchers.**
3. Click **Apply** to populate the resources you selected.



Note: You must select resources in each view of the Ambulatory Organizer.

2 **Day View** displays today’s appointments and appointment gaps with selected resources, location, duration, patient information, appointment details, status of appointment and any additional notes.

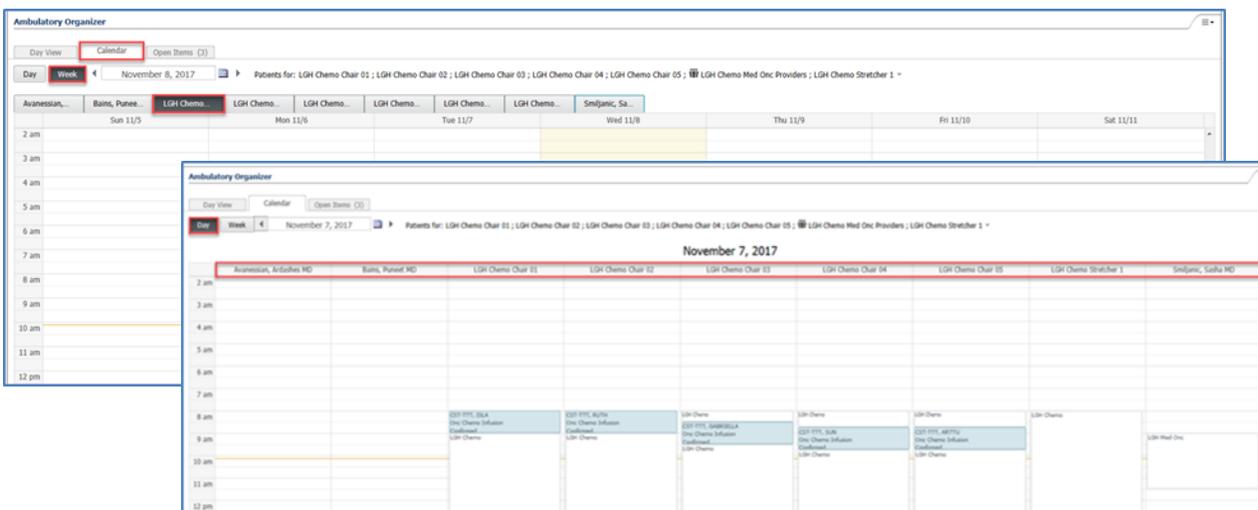


The screenshot shows the Ambulatory Organizer interface in Day View for November 7, 2017. The view displays a list of appointments for five LGH Chemo Chairs. Each appointment row includes columns for Time, Duration, Patient, Details, Status, and Notes. Red boxes highlight these columns in the original image.

Time	Duration	Patient	Details	Status	Notes
8:00 AM LGH Chemo Chair 01	1 hr	CST-TTT, ISLA 71 Years, Female	Onc Chemo Infusion	Confirmed LGH Chemo	
8:00 AM LGH Chemo Chair 02	1 hr	CST-TTT, RUTH 71 Years, Female	Onc Chemo Infusion	Confirmed LGH Chemo	Chief Complaint: breast cancer
8:30 AM LGH Chemo Chair 03	1 hr	CST-TTT, GABRIELLA 71 Years, Female	Onc Chemo Infusion	Confirmed LGH Chemo	
8:45 AM LGH Chemo Chair 04	35 mins	CST-TTT, SUN 70 Years, Male	Onc Chemo Infusion	Confirmed LGH Chemo	
8:45 AM LGH Chemo Chair 05	35 mins	CST-TTT, ARTTU 75 Years, Male	Onc Chemo Infusion	Confirmed LGH Chemo	

Note: The day view is the default view you see when you first log in but going forward, whichever view you were on last displays when you open Ambulatory Organizer.

3 **Calendar View** displays a resource’s schedule for a day or a week. Click the **Day** tab to view multiple resources side by side. Click the **Week** tab to view a single resource’s schedule.



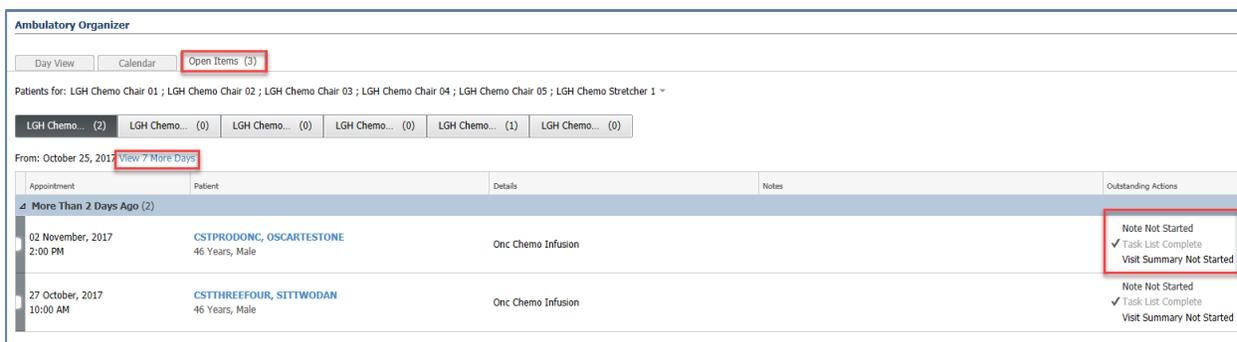
The screenshot shows the Ambulatory Organizer interface in Calendar View for November 7, 2017. The view displays a grid of resources over a week. The resources listed include Avanesian, Bains, Puneet, LGH Chemo (01-05), and Smijanic, Sa. The grid shows appointment slots for each resource, with some slots highlighted in yellow. A red box highlights the 'Calendar' tab in the original image.

Note: A resource can be a person or a location.  Symbolizes a group of resources, again either grouped by location or people.

- 4 The color status on the far left of the Day and Calendar View, assists you to understand the flow of the clinic.

Color Status	Definition
	Light blue indicates a Confirmed appointment.
	Medium blue indicates a Checked In appointment.
	Green indicates a Seen by nurse, medical student, or custom status has taken place.
	Orange indicates a Seen by physician, mid-level provider, resident, or custom status has taken place.
	Dark grey indicates the appointment has been Checked Out.
	White indicates a No Show, Hold, or Canceled appointment (these appointment types are displayed if the system administrator has configured them to display).

- 5 **Open Items View** displays unfinished tasks for the resources displayed for a selected amount of days from when the appointment took place. To view more than the seven days displayed, click **View 7 More Days** (more for physician use).



The screenshot shows the 'Ambulatory Organizer' interface. At the top, there are tabs for 'Day View', 'Calendar', and 'Open Items (3)'. Below the tabs, it lists patients for 'LGH Chemo Chair 01' through 'LGH Chemo Stretcher 1'. A date range is set to 'From: October 25, 2017', with a 'View 7 More Days' link. The main table has columns for Appointment, Patient, Details, Notes, and Outstanding Actions. Two appointments are listed: one on 02 November 2017 and another on 27 October 2017. The 'Outstanding Actions' for the 02 November appointment include 'Note Not Started', 'Task List Complete', and 'Visit Summary Not Started'. The 27 October appointment has 'Note Not Started', 'Task List Complete', and 'Visit Summary Not Started'.

Note: When multiple resources are selected, each resource is displayed as a tab across the top. The grey tab is the resource currently displayed in the view.

6 Explore the **Day View** and **Calendar View** for 5 minutes using the questions below to guide your discovery:

1. Select the **Time** Heading – What do you discover? (**Note: Chronological order is the default selection for Day View**)
2. Select the **Patient** heading – What do you discover?
3. Select the **Status** heading – What do you discover?
4. Under which column heading can you find the **reason for the patient's visit**?
5. Where can you write a **free text note**?
6. Which icon allows you to **find words on the page**?
7. How will you see **updates** that have been made since you logged in?
8. What do you discover when you **hover over** the **icons** on the screen and the patient's name and status in the **Day View** and the **Calendar View**?

Key Learning Points

- Ambulatory Organizer provides a framework to organize your day.
- Different views are available to select, depending on your need.
- Resources need to be selected for each view in order to see the corresponding information.
- Ambulatory Organizer is used more in clinic settings.

Activity 1.2 –Navigating the Tracking Shell

- 1 Click on **Tracking Shell** within the organizer toolbar.



- 2 The **Tracking Shell** displays.

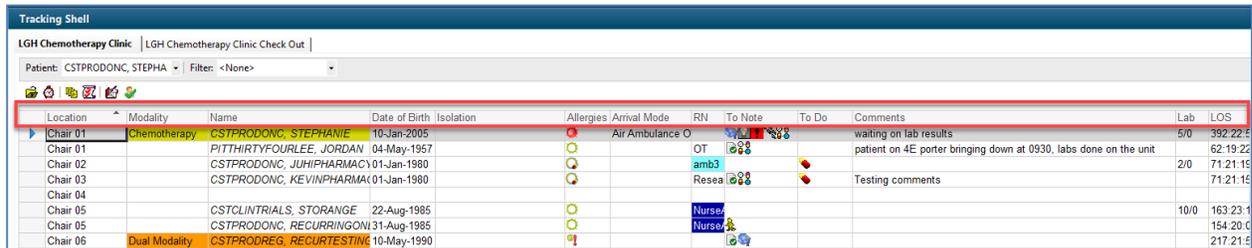
The screenshot shows the 'Tracking Shell' window for 'LGH Chemotherapy Clinic | LGH Chemotherapy Clinic Check Out'. The patient list table is as follows:

Location	Modality	Name	Date of Birth	Isolation	Allergies	Arrival Mode	RN	To Note	To Do	Comments	Lab	LOS
IV WR		GSTPRODME, TEST-JULIET	30-Oct-1984		⊙							19:6:20
IV WR		GSTPRODME, TEST-ECHO	11-Sep-1986		⊙							19:6:14
IV WR	Chemotherapy	GSTPRODME, PHARM-ONE	29-Sep-1938		⊙			⊙				98:7:38
IV WR		GSTPRODHIM, STESTSEVEN T	01-Jan-2000		⊙						4/3	104:9:05
Exam 02		CSTONCONE, ONE	24-Oct-1975		⊙			⊙				99:9:54
IV WR		CSTONCOLOGY, PETER	20-Dec-1977		⊙							43:3:29
IV WR		CSTONCFOUR, FOUR	27-Oct-1990		⊙							97:3:13
IV WR		CSTONC, VIAN	27-Dec-1988		⊙							63:9:07
Chair 15		CSTONC, TUESDAY	27-Aug-1988		⊙		RNAm				4/0	133:6:13
IV WR		CSTONC, TONYA	29-Jan-1985		⊙							63:9:11
NMD		CSTONC, SPINMORSE	12-Apr-2000		⊙							108:9:46

- 3
 1. The **Location Tabs** display two Tracking Shell views. The LGH Chemotherapy Clinic view will display the Patents that have been checked in for an infusion appointment while the LGH Chemotherapy Check Out view will be used by supervisors to view clinical data.
 2. The **Toolbar** contains several icons which will guide you to different functions.



4 The Tracking Shell **rows** display the patients for the selected area and the columns display specific details about the patients in the clinic at a glance. The Ambulatory Oncology Nurse will manage the Location, Modality, Arrival Mode, and RN columns. The Name, Date of Birth, Isolation, Allergy, Lab and LOS columns are populated by pulling data from the patient’s chart.



Location	Modality	Name	Date of Birth	Isolation	Allergies	Arrival Mode	RN	To Note	To Do	Comments	Lab	LOS
Chair 01	Chemotherapy	CSTPRODONC, STEPHANIE	10-Jan-2005			Air Ambulance O				waiting on lab results	5/0	392:22:5
Chair 01		PITTHIRTYFOURLEE, JORDAN	04-May-1957				OT			patient on 4E porter bringing down at 0930, labs done on the unit	62:19:22	
Chair 02		CSTPRODONC, JUHIPHARMAC	01-Jan-1980				amb3				2/0	71:21:15
Chair 03		CSTPRODONC, KEVINPHARMA	01-Jan-1980				Resea			Testing comments		71:21:15
Chair 04												
Chair 05		CSTCLINTRIALS, STORAGE	22-Aug-1985				Nurse				10/0	163:23:1
Chair 05		CSTPRODONC, RECURRINGONI	31-Aug-1985				Nurse					154:20:0
Chair 06	Dual Modality	CSTPRODREG, RECURTESTING	10-May-1990									217:21:5

5 Events are the time-stamped activities that occur during a patient's visit. Events are used to communicate the status of activities for a patient, such as nurse exam, doctor exam, lab orders, and radiology orders. (Ex: Chemo ready will be added as an event by Pharmacy to communicate to Nursing the patient’s Chemotherapy is ready to be administered. Nursing will add patient Ready for treatment icon). Events are depicted with icons and are visible in the ‘To Note’ and ‘To Do’ columns on the Tracking Shell.

Icon	Description
	Blood Product Ordered
	Clinical Trial/Study
	Interpreter Required
	Outpatient Rx Ready
	Outpatient Rx Reminder
	Porter Called
	Procedural Sedation
	Provider Exam Needed
	Treatment in Progress
	Treatment on Hold
	Volunteer Needed
	Ready for Treatment
	Meds Ready

6 From the Tracking Shell you will see which nurse has been assigned to your study patient and which chair or bed they are assigned to. You can add the clinical trials icon to the To Note section and type text into the comments section of the tracking board.

1. Right click on the box in the To Note column in the same row as the study patient.

Tracking Shell

LGH Chemotherapy Clinic | LGH Chemotherapy Clinic Check Out |

Patient: ONCOLOGY-NURSEA, G | Filter: <None>

Location	Modality	Name	Date of Birth	Isolation	Allergies	Arrival Mode	RN	To Note	To Do
Exam 02									
Exam 03									
IV WR		Validate, Pharm-Oncology	1971-Jan-31						
IV WR		ONCOLOGY-NURSEA, GRETCH	1969-Jan-31						
IV WR		ONCOLOGY-NURSEA, MEGHAN	1969-Jan-31						

2. Click on Clinical Trial/Study, you will see this populate in the lower box, then click OK.

Events < CSTPRODREG, RECURRINGFORTY >

CSTPRODREG, REC... DOB:10-Ma... MRN:70000... Code Status: Process: Location:LGH Chemo; C...
 Age:27 years Enc:7000000... Disease: Enc Type:Recurring
 Allergies: Allergies Not ... Gender:Male PHN:987656... Dosing Wt: Isolation: Attending:

Current | Modify

Blood Product Order Provider Exam Needed ALL EVENT TYPES Lab
 Clinical Trial/Study Ready for Treatment ADT Nursing
 Interpreter Required Treatment in Progress Billing Orders
 Isolation Treatment on Hold Communication Physician
 Meds Ready Volunteer Needed Depart Action Registration
 Output RX Ready Documentation Tech
 Output Rx Reminder Events To Do
 Porter Called GBS Visitor Informa
 Procedural Sedation General Xray

Request Start Complete Automated

Time	Event	Type	Status	User	Order	Status
01-Dec-2017 15:42:19	Clinical Trial/Study	To Do	Request	TestDN, OncologyAmbulat		

OK Apply Close

3. The Clinical Trial/Study icon  will appear now for that patient in the tracking board.

Modality	Name	Date of Birth	Isolation	Allergies	Arrival Mode	RN	To Note
Chemotherapy	CSTPRODNC, STEPHANIE	10-Jan-2005			Air Ambulance O	RNAmb	
Dual Modality	CSTPRODREG, RECURTESTING	10-May-1990				RNAmb	
Radiation	CSTPRODREG, RECURRINGFO	10-May-1990				RNAmb	

4. To remove the Clinical Trial/Study icon right click on the box under the To Note section in the same row as the study patient. The window below will open again, then beside the event in the lower box, click on Status, and click complete, then OK to exit out.

Current Modify

Blood Product Order Ready for Treatment
 Interpreter Required Treatment in Progress
 Isolation Treatment on Hold
 Meds Ready Volunteer Needed
 Output RX Ready
 Output Rx Reminder
 Porter Called
 Procedural Sedation
 Provider Exam Needed

Request Start Complete Automated

Time	Event	Type	Status	User
01-Dec-2017 15:55:26	Clinical Trial/Study	To Do	Complete	TestDN, OncologyAmbulat

5. The Clinical Trial/Study icon is now gone.

Tracking Shell

LGH Chemotherapy Clinic | LGH Chemotherapy Clinic Check Out |

Patient: CSTPRODREG, RECURRII | Filter: <None>

Modality	Name	Date of Birth	Isolation	Allergies	Arrival Mode	RN	To Note	To Do
Chemotherapy	CSTPRODNC, STEPHANIE	10-Jan-2005			Air Ambulance O	RNAmb		
Dual Modality	CSTPRODREG, RECURTESTING	10-May-1990				RNAmb		
Radiation	CSTPRODREG, RECURRINGFO	10-May-1990				RNAmb		

6. Add some free text to the comments section in the tracking board: click on the box beside the study patient in the column marked “Comments”, and start typing: Patient to be re-consented by R-nurse at 1030. Your comment will be automatically saved in the tracking shell.

Chair 07		CSTONC, STWQMTTHREE	12-Apr-2000			Resea	
Chair 08	Chemotherapy	CSTPRODDNC, WORKINGGRO	09-Aug-1973				
Chair 08	Radiation	CSTPRODREG, RECURRINGFO	10-May-1990			RNA	Patient to be considered by R-nurse at 1030
Chair 09		CSTPRODREG, TESTRECURAG	10-May-1990				
Chair 10		CSTPRODREG, RECURTHREE	10-May-1990				

Note: When the patient has completed treatment and you have finished your interaction with them, you will need to remove the associated ‘**To Note**’, ‘**To Do**’, and **Comments** created within the Tracking Shell, unless they are relevant for future infusion appointments since these will be carried forward to subsequent treatments.

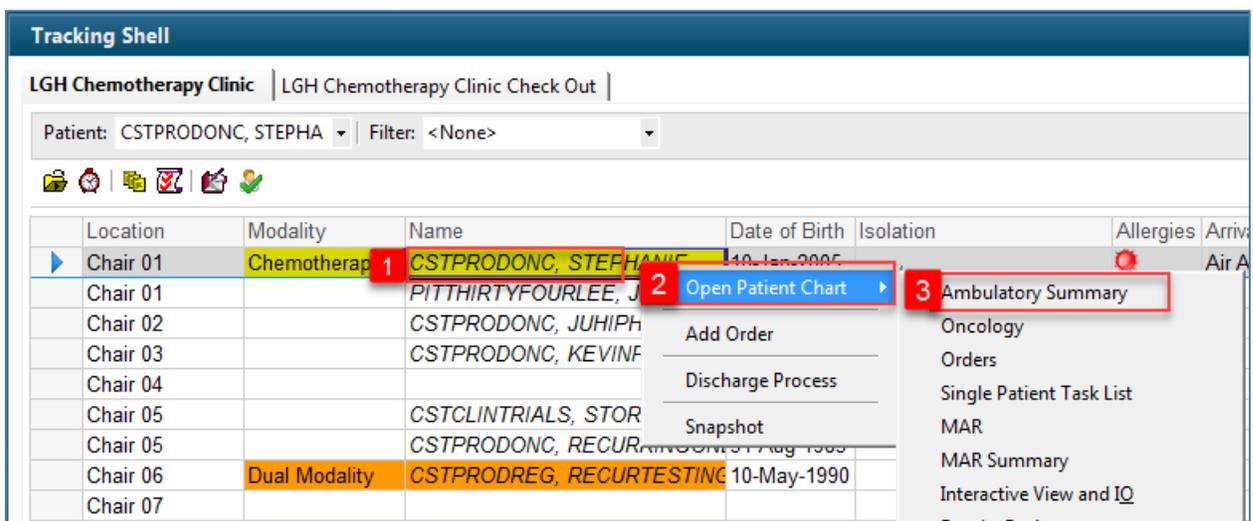
Key Learning Points

- Tracking Shell is a communication tool between staff, in particular nursing and pharmacy.
- You can see which nurse a patient is assigned to, as well as the patient’s status during their treatment.
- You can add and remove the clinical trials icon to the To Note events column.
NOTE: You must remove the icon when the patient is discontinued from study.
- You can add free text to the comments section, which must be removed when no longer applicable.

Activity 1.3 Accessing a Patient’s Chart

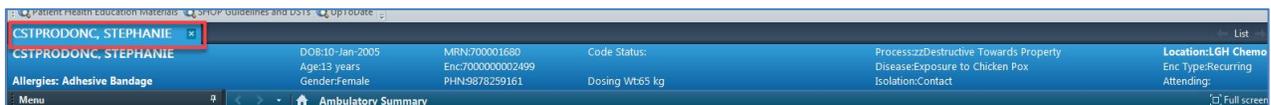
1 As a Research Nurse you will be accessing a patient’s chart to view results and documentation to aide in your work and gathering of information pertinent to your patient. Recall the e-learning module on navigating PowerChart. Documentation will continue to occur outside of the Electronic Health Record (EHR) for Clinical Trials Purposes. Now, let’s open your patient’s chart.

1. Right click on your patient’s name
2. Select **Open Patient Chart**
3. Select **Ambulatory Summary**
4. Ensure you have the correct patient chart open by verifying with the patient if present and looking at the information in the blue banner bar (name, DOB and encounter).



The screenshot shows the 'Tracking Shell' interface for 'LGH Chemotherapy Clinic'. A table lists patients with columns for Location, Modality, Name, Date of Birth, Isolation, Allergies, and Arrival. A context menu is open over the patient 'CSTPRODONC, STEPHANIE'. The menu items are: Open Patient Chart (highlighted with a red box and number 2), Ambulatory Summary (highlighted with a red box and number 3), Add Order, Discharge Process, Snapshot, Oncology, Orders, Single Patient Task List, MAR, MAR Summary, and Interactive View and IQ. Red boxes and numbers 1, 2, and 3 indicate the steps: 1 points to the patient name, 2 points to 'Open Patient Chart', and 3 points to 'Ambulatory Summary'.

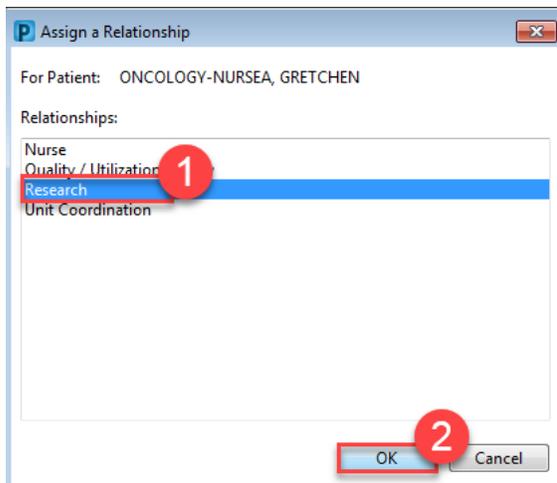
Note: Alternatively with the patient selected you could use the  icon to access the patient’s chart or double-click on the  beside the location of the patient.



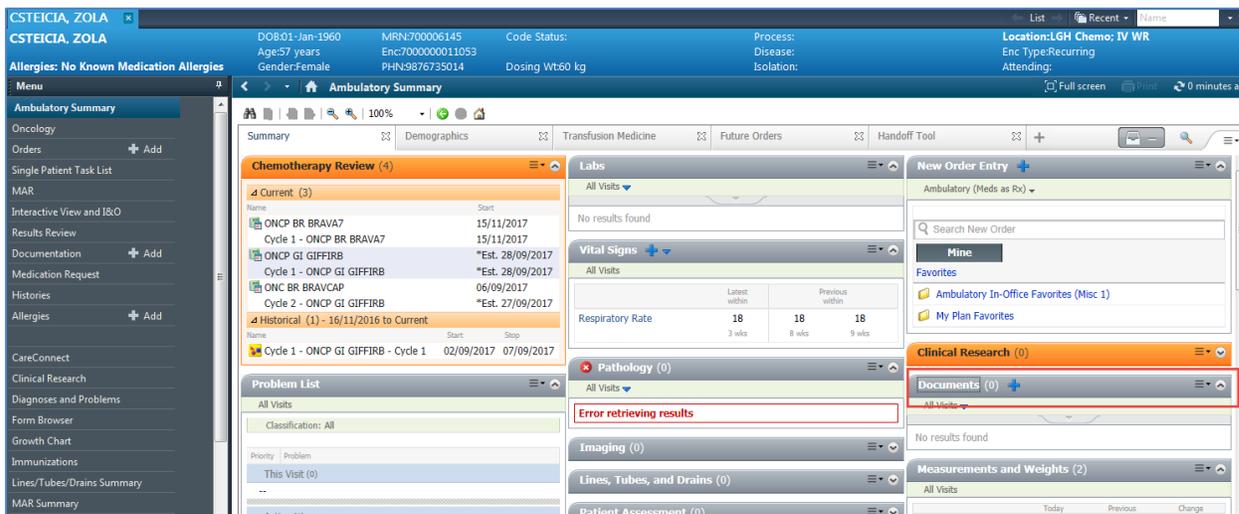
The screenshot shows the patient's chart banner bar for 'CSTPRODONC, STEPHANIE'. The banner bar contains the following information: Allergies: Adhesive Bandage; DOB: 10-Jan-2005; Age: 13 years; Gender: Female; MRN: 700001690; Enc: 700000002499; PHN: 9878259161; Code Status: ; Dosing Wt: 65 kg; Process: Destructive Towards Property; Disease: Exposure to Chicken Pox; Isolation: Contact; Location: LGH Chemo; Enc Type: Recurring; Attending: .

2 When you access the chart for the first time, you are prompted to **Assign a Relationship** with the patient this is the same as signing the signature record in a chart currently.

1. Select **Research**.
2. Click **OK**



3 The **Ambulatory Summary** screen (known as an mPage) of the chart is the main screen which appears as an Ambulatory Oncology Nurse when you first open a patient’s chart. This screen is a snapshot into various sections of the patient’s chart and is a good place to begin to navigate from.



Note: If a patient is enrolled on a clinical trial, the Clinical Research Component contains more information regarding the trial as well as contact information for the Clinical Nurse Coordinator. A process note would also be added within the banner bar (this will be explained in activity 3.3 and 4.1).

Key Learning Points

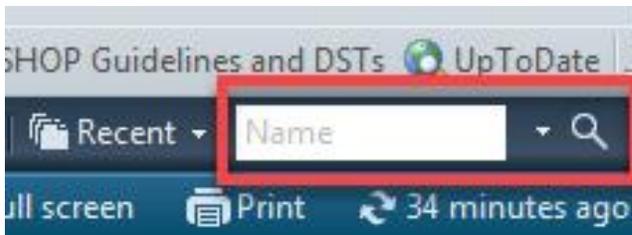
- You can access a patient's chart right from Tracking Shell.
- To see the patient's chart you must establish a relationship in order to view the contents.
- The main screen to appear as an Ambulatory Oncology Nurse is the Ambulatory Summary screen which is a snapshot of various sections within the chart.

Activity 1.4 – Message Centre: Research Nurse Telephone Triage

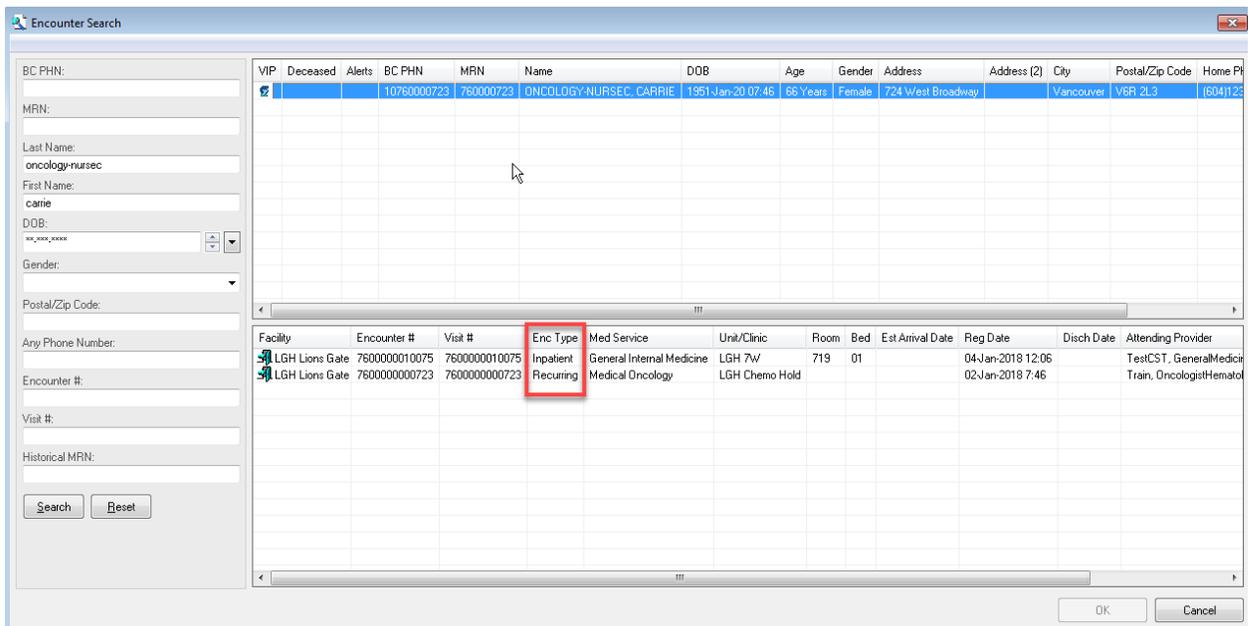
As a Research Nurse you may have to document the details of a phone call with a patient and you may need to communicate with the Provider. Message Centre is the application within PowerChart that will allow you to do that; communicate with other health care professionals, and forward information and results. Messages sent in Message Centre are part of the legal medical record and communication should pertain to the patient.

An e-learning module is available for more information on the functionality of Message Centre.

- 1 Open the patient's chart using the search  function.

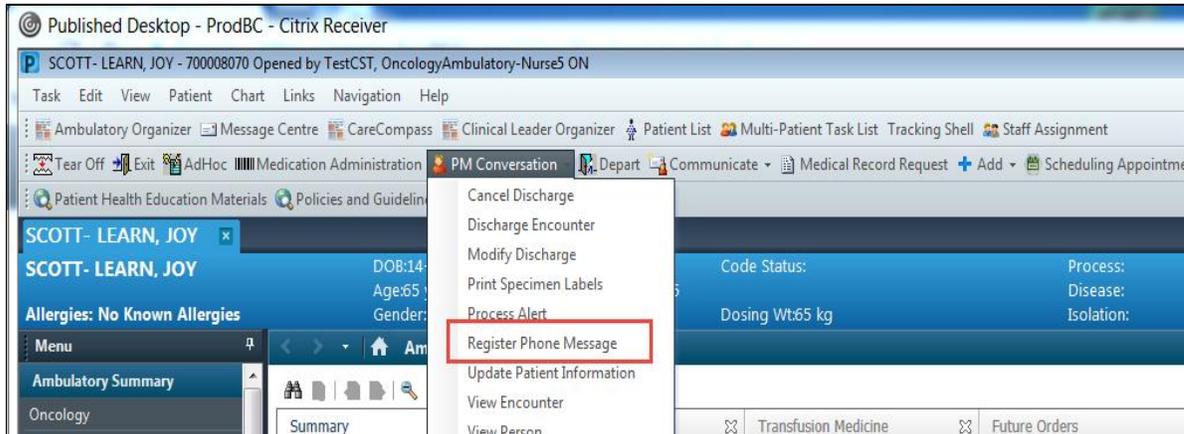


- 2 Select both the patient and the appropriate encounter. Click **OK**.

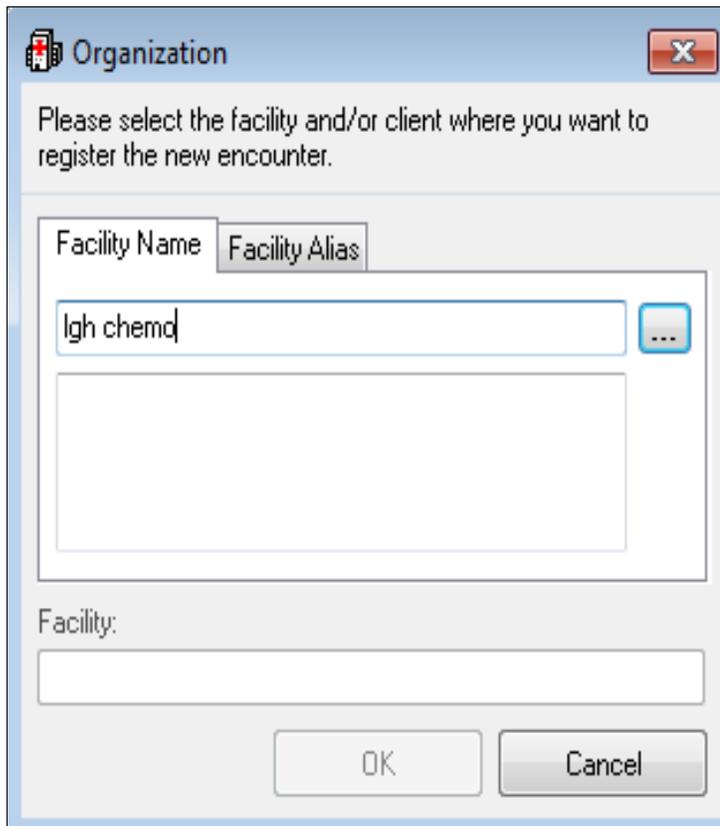


3 You may need to **Add an Encounter** if the call is not related to an existing encounter.

1. Once you have opened the patient's chart select the down arrow from **PM Conversation** in the Organizer toolbar and choose **Register a Phone Message**.



2. Enter the **Facility Name**



- 4 The **Register Phone Message** window will open. Confirm the details and click **Complete**. The Phone Message Encounter Number will display.

Click **OK**

- 5 You will remain in the patient's chart on the **encounter** that you previously selected until you change the **Encounter Type**. To do this, click on **Encounter Type** in the banner bar.

- 6 The **Custom Information** window will open. Select the **Phone Message** encounter and click **OK**, and click **Yes** on the **Visit List** window.

Custom Information: SCOTT- LEARN, JOY

Encounter Type	Location	Admit Date	Discharge Date	Encounter #
Phone Message	LGH Chemo	30-Nov-2017 12:33 PST		7000000015829
Recurring	LGH Chemo IV WR	14-Nov-2017 14:40 PST		7000000013505
Outpatient	LGH Chemo IV WR	14-Nov-2017 13:36 PST	14-Nov-2017 23:59 PST	7000000013494

GENERAL INFORMATION

Full Name: SCOTT- LEARN, JOY EMC:

Reg Date/Time: 14-Nov-2017 14:40 PST EMC Phone:

D.O.S.: 15.9 Fin Number: 7000000013505

Nurse Unit: LGH Chemo

Room: IV WR

Visit List

This will change your patient's chart to the selected encounter.
Do you want to continue?

Yes No

- 7 You will now be in the patient’s chart in the Phone Message encounter.

List Recent Name

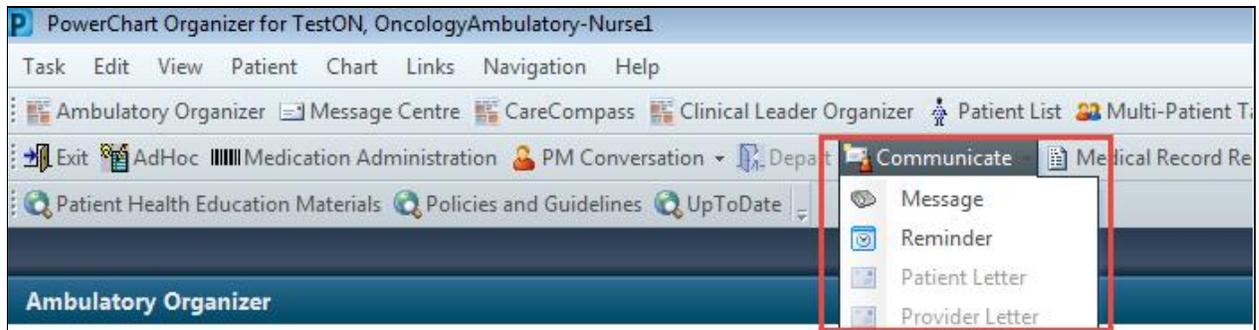
Location: LGH Chemo

Enc Type: Phone Message

Attending:

Full screen Print 0 minutes ago

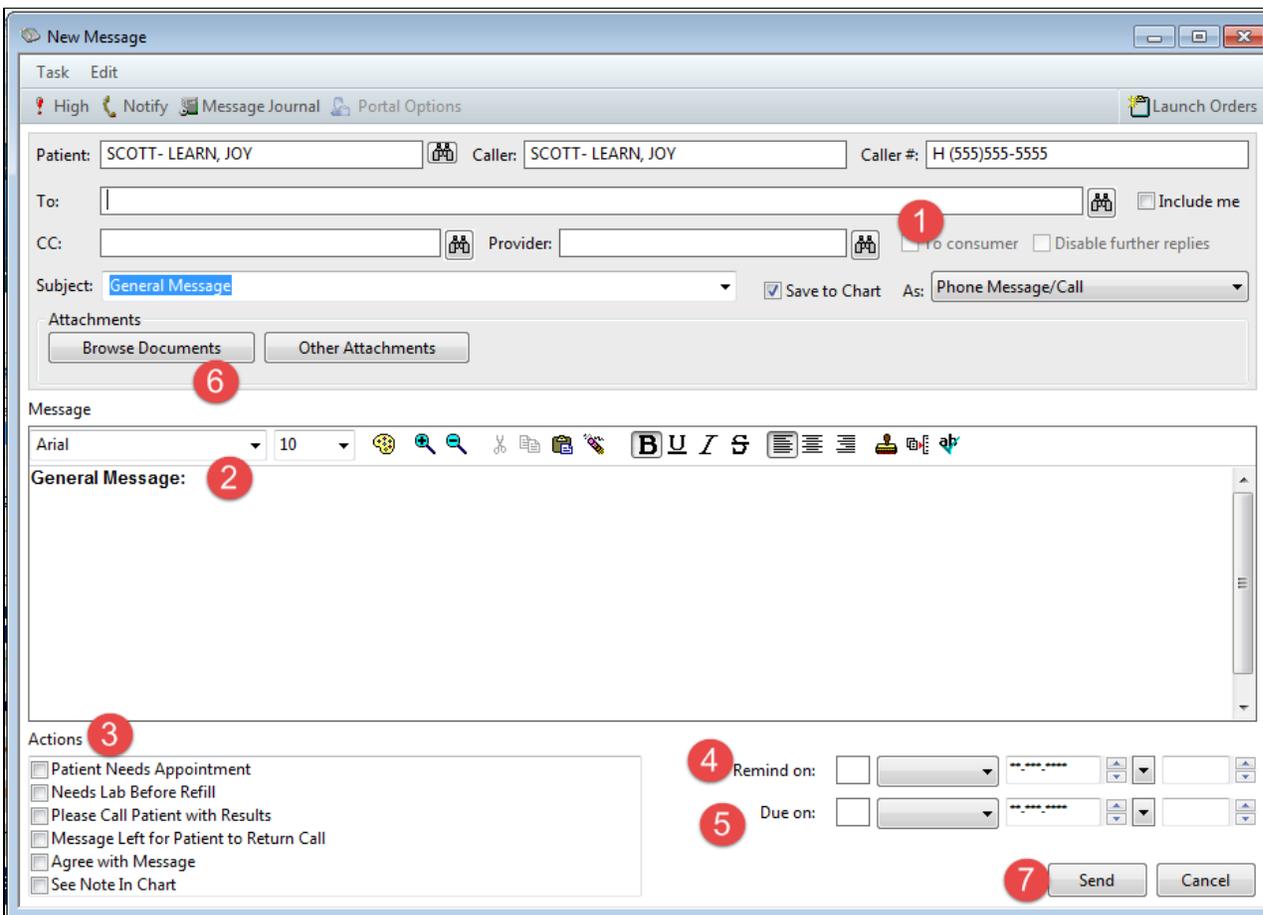
- 8 To share the details of the phone encounter with the appropriate provider, select the down arrow beside **Communicate** from the organizer toolbar in PowerChart, and then select **Message** from the drop-down list of options.



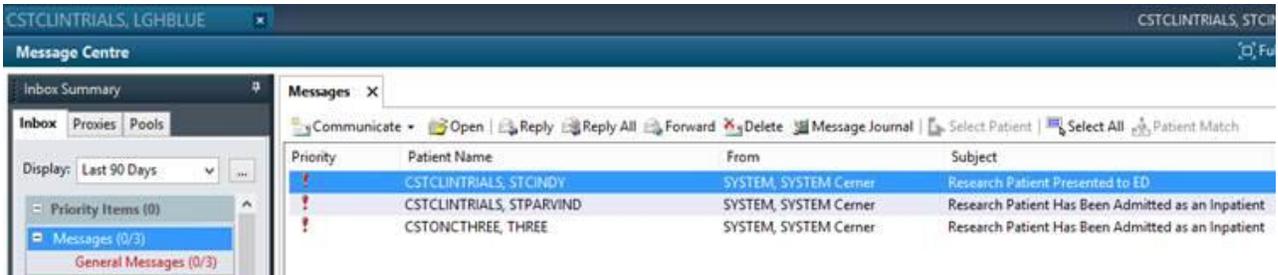
Note: This function is also available through Message Centre, Quick Reference Guides will be available to describe Message Centre and its functionality.

9 The **New Message** window will open and will be pre-populated with your patient’s name and phone number.

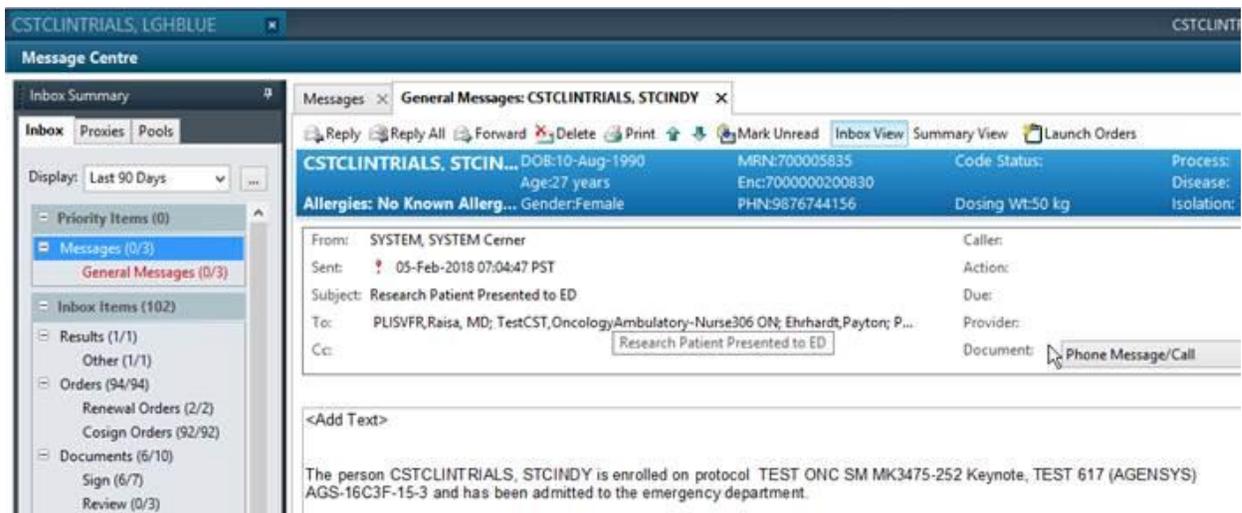
1. Search for the name of the health care provider that you wish to send this message to.
2. Use this space to write the body of the message.
3. Selecting an item in the **Actions** list will pull the item into the body of the message when completed and sent.
4. Enter date and time details into the boxes beside **Remind Me** in order to receive a reminder in your **Message Center** if you need to perform some follow up actions. The message will not appear in Message Center until this time.
5. Enter date and time details into the boxes beside **Due on** in order to set a desired date/time to complete. Overdue messages within the message center will display in red font.
6. If you have completed a more fulsome assessment that you have documented on a Clinical Note, you can browse documents and attach the document to this message.
7. Click **Send** when you are done.



10 As a Research Nurse you will receive messages into your Message Centre Inbox anytime a patient that is enrolled on one of your studies is admitted to a CST Cerner site. Please see the screen shots below to see how the message will appear in your message centre.



11 You can expand the message to see additional details as seen in this screen shot below.



Key Learning Points

- Message Centre can be used during telephone triage to document and share information with other members of the healthcare team.
- Register a Phone Message Encounter Type if the issue is unrelated to an existing encounter.

PATIENT SCENARIO 2 – Protocol Office Manager (POM)

Learning Objectives

At the end of this Scenario, you will be able to:

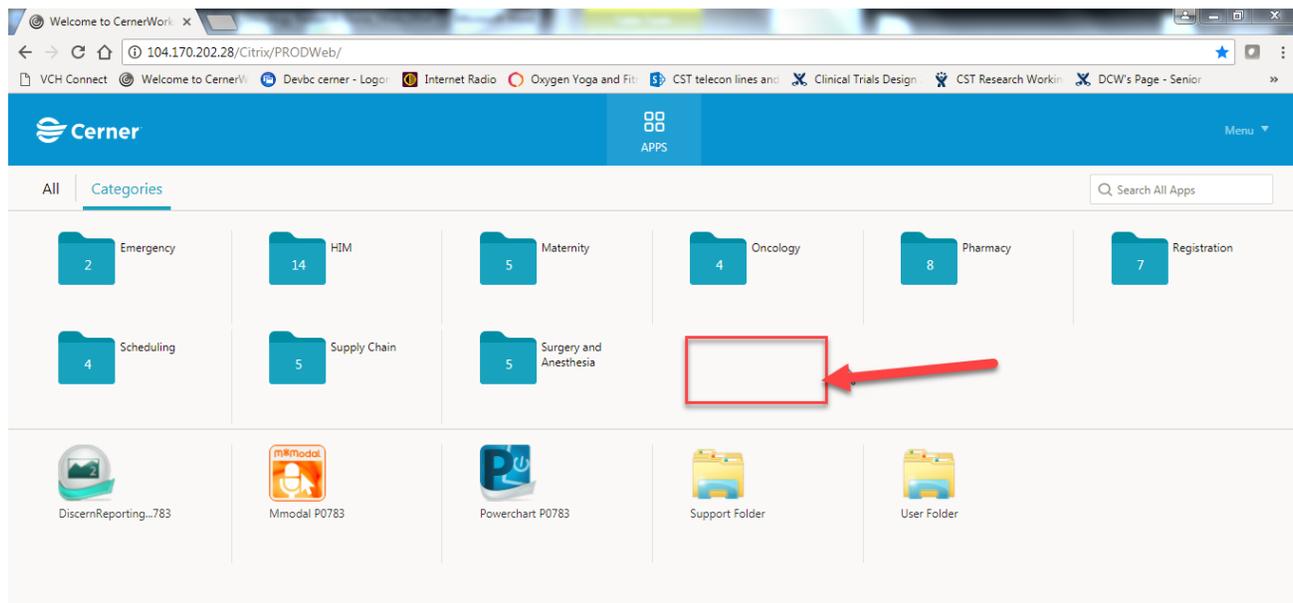
- Navigate Protocol Office Manager (POM)
- Review Clinical Trials already built in POM
- Describe the Process to add a new trial to POM

BACKGROUND

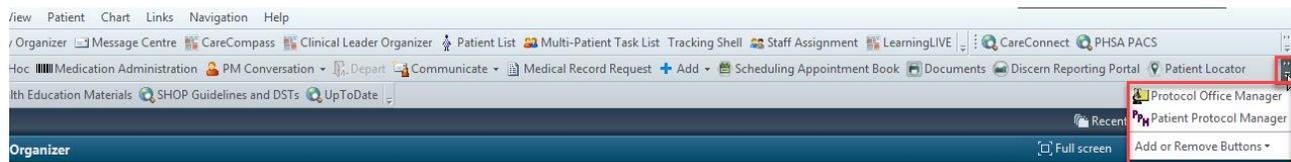
In this workbook, you will learn to use the two Clinical Trials applications that will be implemented in the Clinical Information System (CIS). These are Protocol Office Manager (POM) and Patient Protocol Manager (PPM). The terms ‘study’ and ‘protocol’ will be used interchangeably throughout the document.

You will access POM and PPM one of two ways:

1. There will be a Research folder in the Storefront when you first log in to the CIS, the POM and PPM icons will be housed within this folder. You can just click on them and the application will open (you won't have to re-enter username or password):



2. You can access POM and PPM within PowerChart, just click on the application within the toolbar:



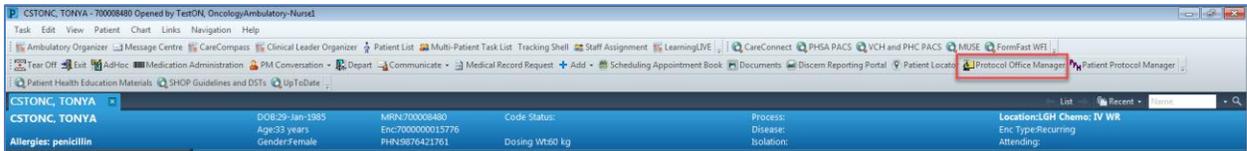
For today your classroom facilitator will help you access these applications.

Protocol Office Manager (POM) is an application within PowerTrials which is used to:

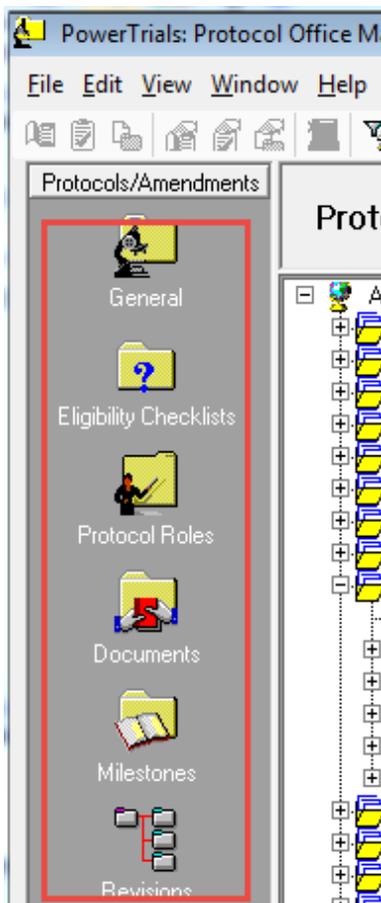
- Create and update protocols and protocol-related information. The protocol-related information that can be viewed here includes details about whether the study is open to accrual, who the Primary Investigator is, who the Research Nurse is, and the title of the study
- View current trials within the system in order to refer patients to a clinical trial. This means that a Trials Nurse or a Provider at one location can search for protocols at other locations.

Activity 2.1 – Accessing and Navigating the Protocol Office Manager (POM)

- 1 This is where you would Click on **Protocol Office Manager (POM)** from the toolbar; for today please ask your instructor to assist you with access to POM.



- 2 The following views are available. The Action table, seen below, describes the content within each view.

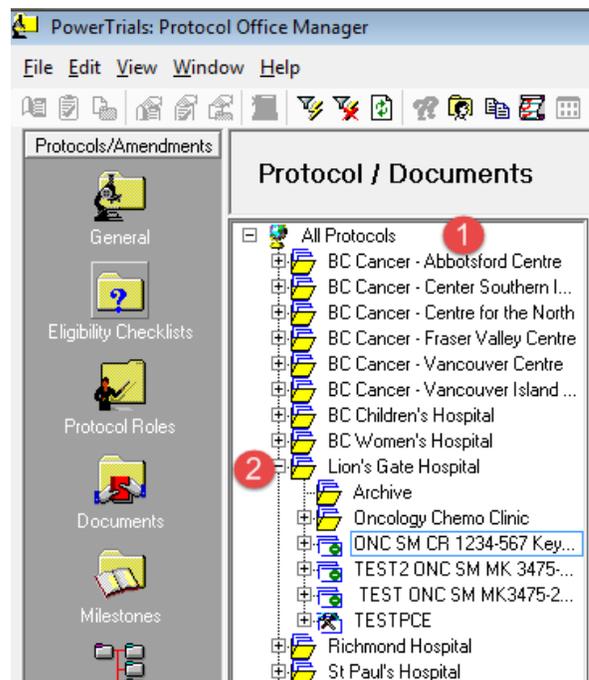


Icon	Action
	The General view for a protocol displays summary information about the protocol.
	The Eligibility Checklists will not be used and therefore this folder will be empty.
	The Protocol Roles view for a protocol displays summary information about the roles associated with a protocol. The PI, Research Nurse and back-up Research Nurse will be listed here.
	The Documents view for a protocol displays information about the documents associated with the protocol. The prohibited medications list will be here.
	The Milestones view for a protocol displays information about the milestones associated with a protocol.
	The Revisions view for a protocol displays information about the revisions associated with a protocol.

- 3 Find the Icon toolbar and review the indication for each icon by hovering over the icon.



- 4
1. The list of facilities for which there are study protocols available.
 2. You can expand by clicking  to see further details such as clinics/tumor types and study protocols available.



Key Learning Points

- POM provides a view of all studies that are available within all of the CST Health Organizations.
- The General View within POM will provide study details like the protocol name, the status of the study, the target disease, and the primary investigator.

Activity 2.2 – Find and Review a Protocol

The specific protocols available for your site have been built into the CIS. The study has been entered into **POM** and you would like to view the protocol information. The Protocol Name is **ONC SM CR 1234-567 Keychain TRAIN**. The site is **Oncology Chemo Clinic at Lions Gate Hospital**.

1 Navigate within the **Protocol/General** folder and locate **Lions Gate Hospital**.

- 2
1. Click the **Tree** icon next to **Lions Gate Hospital** to expand the folder
 2. Click the **Tree** icon next to **ONC SM CR 1234-567 Keychain TRAIN** to open the protocol

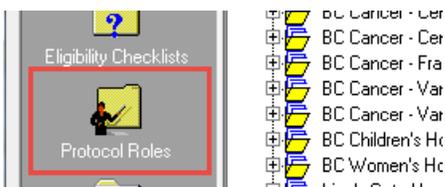
General Protocol Information	
Name	
Title	A Phase 3 Randomized, Double-Blind, Placebo-Controlled Study of P in Combination With A or Placebo in Sub
Primary Mnemonic	ONC SM CR 1234-567 Keychain TRAIN
Protocol Aliases	Secondary Contact - Research Nurse: Tom Lee 604-567-1234 *ext12345
	Primary Contact - PI: TestON, Oncologist/Hematologist-Physician604-987-9876ext12345-UV
	REB # - 12345
	Health Canada NOL # - 5678
	Site # - 1234567
Date of IRB Approval	
Date Activated	01-Dec-2017
Date IRB Approval Expires	
Date Closed	
Date Completed	
Status	Open to Accrual
Current Site Accrual	0
Site's Targeted Accrual	6
Trial Wide Targeted Accrual	600
Principal Investigator	Test_Onc Physician - Oncologist/Hematologist, MD
Study Type	Therapeutic
Phase	III
Program	Drug
Participation Type	Interventional
Treatment Modalities	
Diseases to be Treated	
Primary Sponsor	Incyte Corporation
Secondary Sponsors	
Initiating Service	Lion's Gate Hospital
Protocol Contacts	Grewal, Parvind - Creator/Start Up Coordinator
	Test_Onc Physician - Oncologist/Hematologist, MD - Principal [Qualified] Investigator
Cerner Research Network	No

Note: Access to the Protocol Folders may be limited based on whether or not you have been assigned a role.

- 2 When you have selected your protocol (1), click on the **General** view (2). This view will give you access such as, who the Principal Investigator is (3), the date the study was activated (4), the study status (5) and the Initiating Service (site) (6).

Name	General Protocol Information
Title	A Phase 3 Random Unresectable or Me
Primary Mnemonic	ONC SM CR 1234-5
Protocol Aliases	Secondary Contact
	Primary Contact - PI
	REB # - 12345
	Health Canada NOL
	Site # - 1234567
Date of IRB Approval	
Date Activated	01-Dec-2017
Date IRB Approval Expires	
Date Closed	
Date Completed	
Status	Open to Accrual
Current Site Accrual	1
Site's Targeted Accrual	6
Trial Wide Targeted Accrual	600
Principal Investigator	TestON, Oncologist
Study Type	Therapeutic
Phase	III
Program	Drug
Participation Type	Interventional
Treatment Modalities	
Diseases to be Treated	
Primary Sponsor	Incyte Corporation
Secondary Sponsors	
Initiating Service	Lion's Gate Hospita
Protocol Contacts	Grewal, Parvind - Cr TestON, Oncologist

- 3 Click on the **Protocol Roles** view. This will give you access to information such as who the study creator is, who the Research/Clinical Trials Nurse is, who the Study/Data Coordinator is, etc.



- 4 Now click on each of the **Documents**, view the Milestones view and the Revisions view. Navigate to see what documents are available here. (Viewable only if you have been assigned a role to the study).

Key Learning Points

- Use POM to review protocols available and general information about the protocol.
- There are 6 different views in POM where you can find more information about the protocol.
- Use the  and  buttons to expand and collapse the all protocols list

PATIENT SCENARIO 3 – Enrolling a Participant

Learning Objectives

At the end of this Scenario, you will be able to:

- Enroll a participant in Patient Protocol Manager (PPM)
- Find the signed Research Consent Form in the Documentation tab
- Place the Research process alert in banner bar using PM Conversation

SCENARIO

The provider has a patient coming to LGH Oncology Chemo Clinic today for a follow-up visit post chemotherapy. The patient is a 29 year old female with metastatic skin melanoma, and her disease is not responding to the current treatment. The provider would like to consider a study treatment option.

Note: In this training, we will assume that the patient's completed consent form has been faxed to Work Queue Monitor and has been uploaded in the patient's chart.

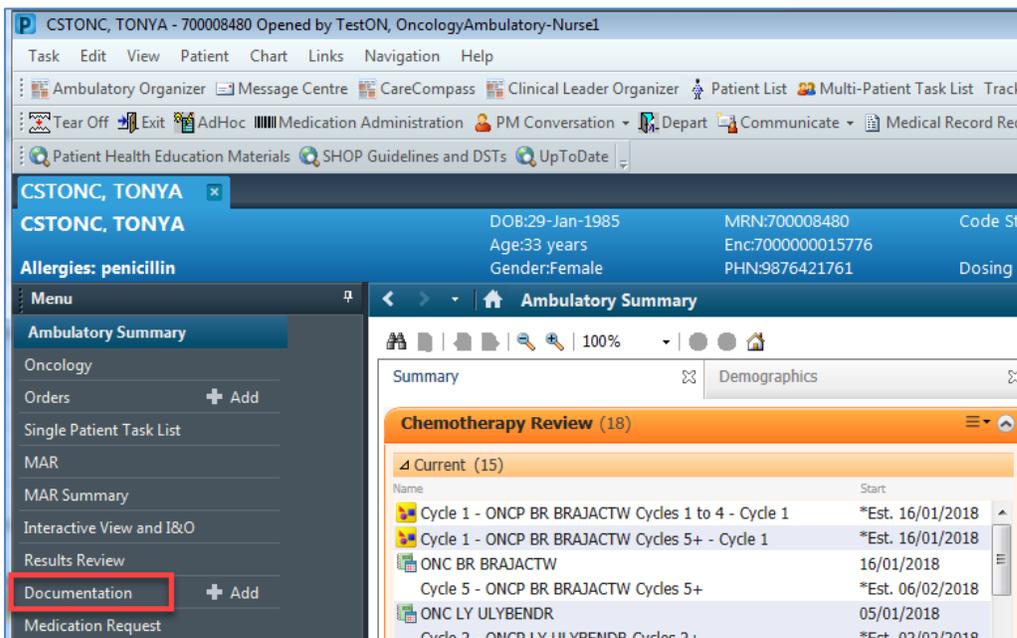
As a Research Nurse, you will complete the following activities.

- Verifies the signed consent is under the Documentation tab in the patient's chart
- Enroll the participant in a study through PPM
- Updates the process alert in the patient's chart, indicating On Research Study
- Verifies that the protocol is displayed in the clinical research component and tab

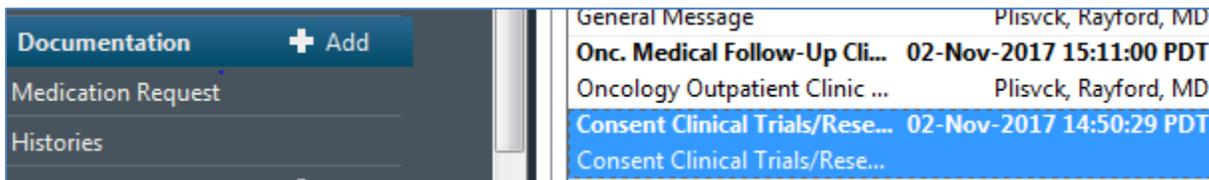
Activity 3.1 – Verifying the Patient’s Consent Form

Signed consent forms will be scanned and faxed to the appropriate LGH queue (via Work Queue Monitor) for addition to the patient’s electronic health record. Clerks will monitor the queues and will add documents to the appropriate tab within the patient’s chart. You will not be able to practice this today.

- 1 Navigate back to your provided patient’s chart. Now that you are back in the patient’s chart, Use the Menu to navigate and click on **Documentation**.



- 2 Below is an example of an uploaded consent form.



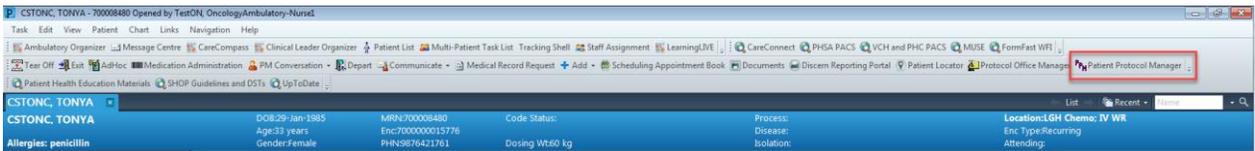
Key Learning Points

-  Faxing of the signed consent form is done through work queue monitor.
-  Verify that the consent form is displayed in the correct patient's chart.

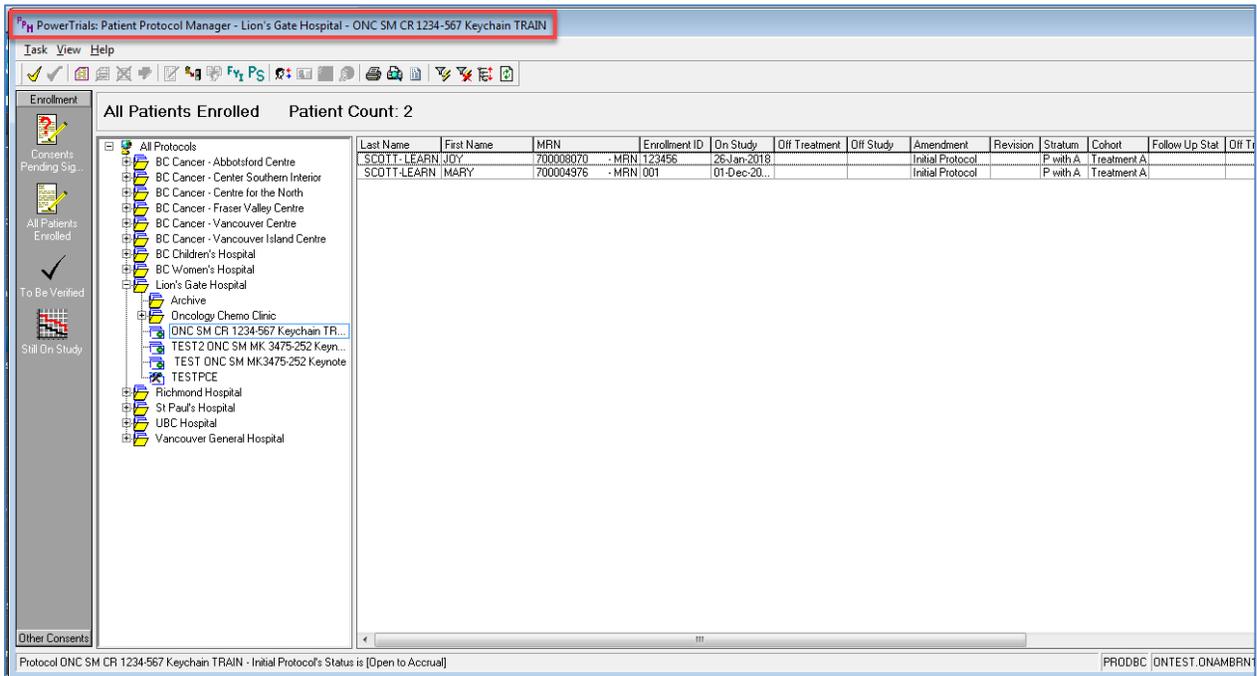
Activity 3.2 – Enrolling a Patient using the Patient Protocol Manager (PPM)

The patient will need to be enrolled on the study in PPM prior to the provider placing study related orders.

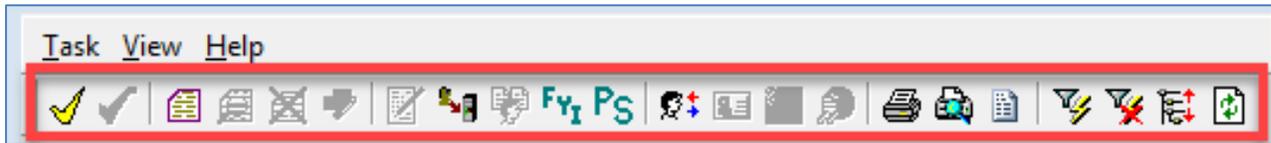
- 1 For usual workflow you would click on **Patient Protocol Manager (PPM)** in the organizer toolbar. For today please ask the facilitator for help navigating to PPM if they have not already guided you.



- 2 The PPM application window appears

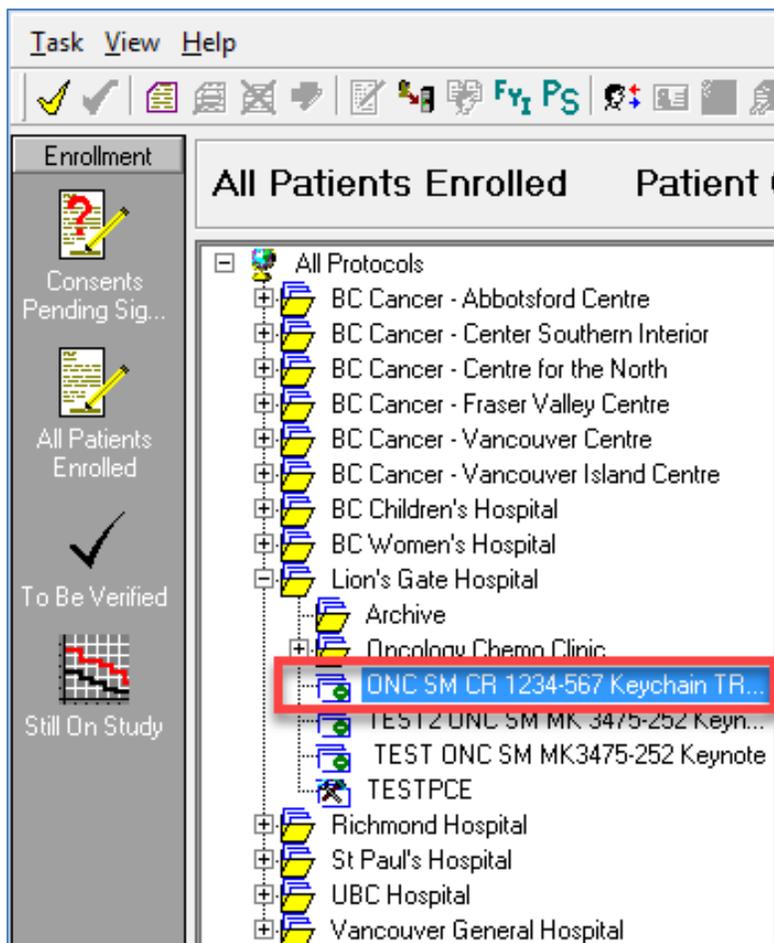


- Remember how you navigate through **Protocol Office Manager (POM)**? It will be similar steps. Go ahead and hover to discover all the icons in the menu.



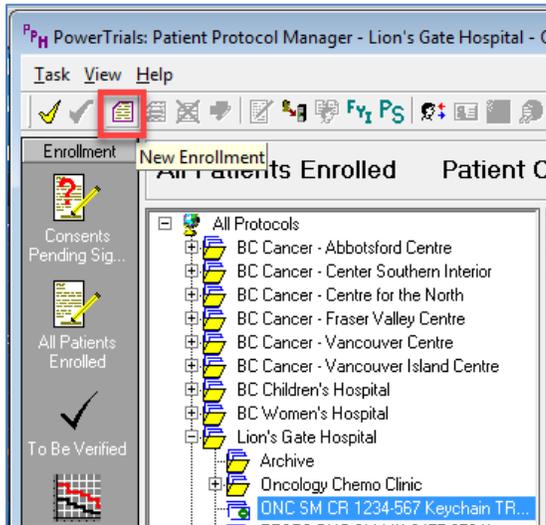
- To practice, let's go ahead and enroll your patient.

Locate and click on **ONC SM CR 1234-567 Keychain TRAIN** under the **Lion's Gate Hospital** tree folder.

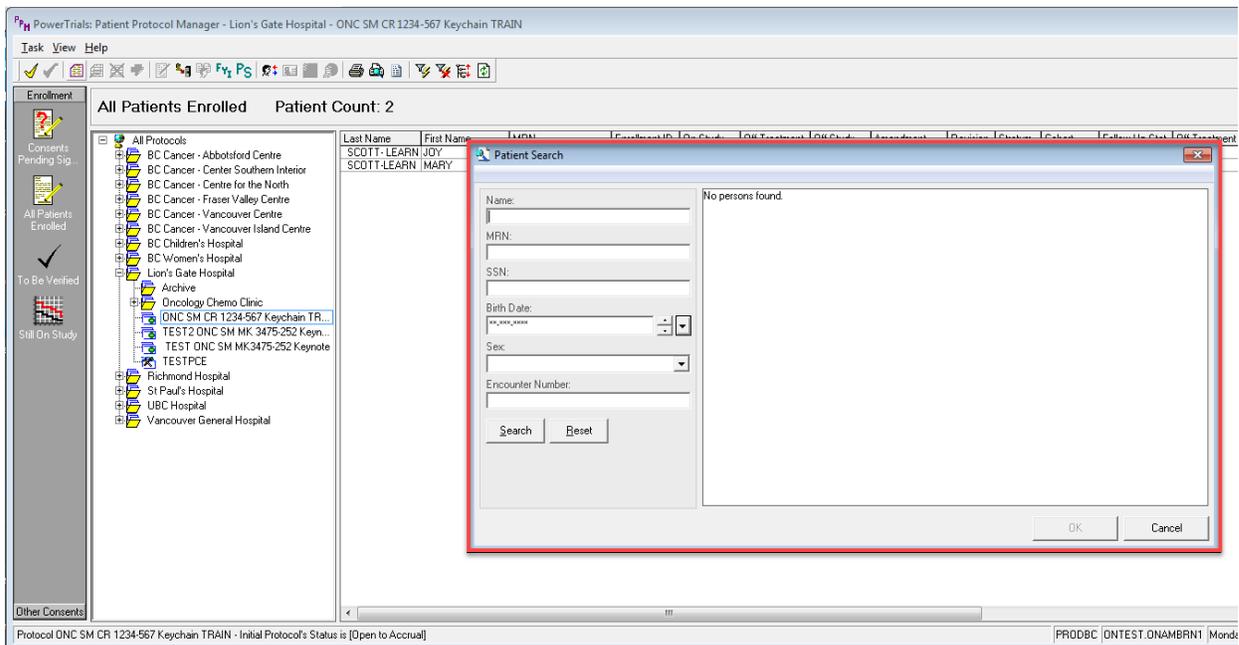


Note: The protocol is now highlighted in blue.

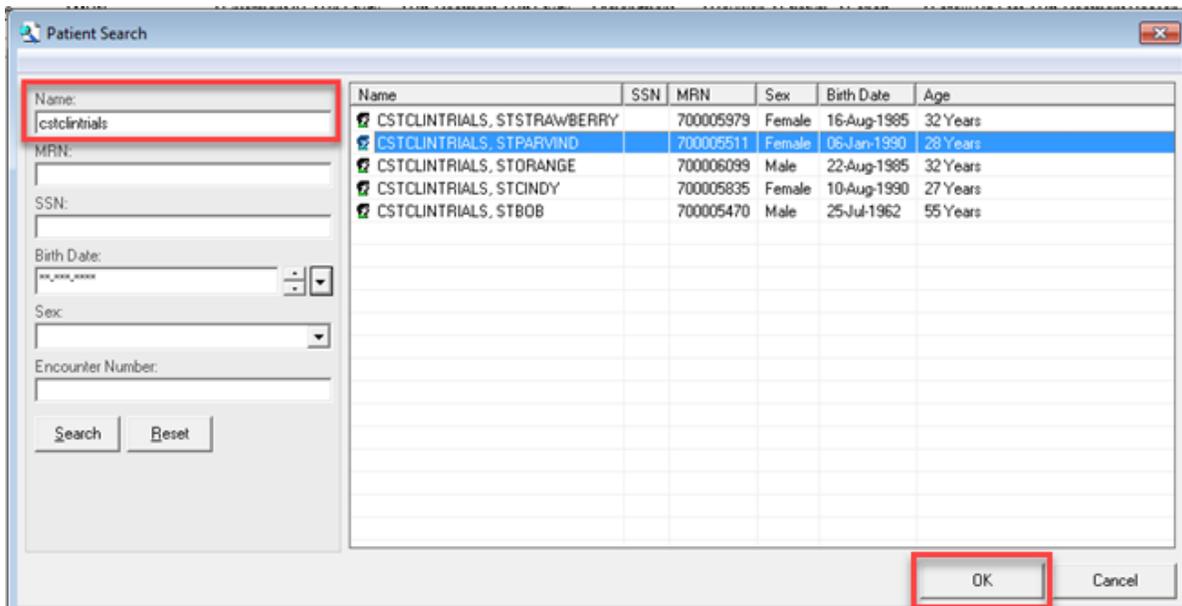
- 5 Click on the **New Enrollment** icon from the menu bar.



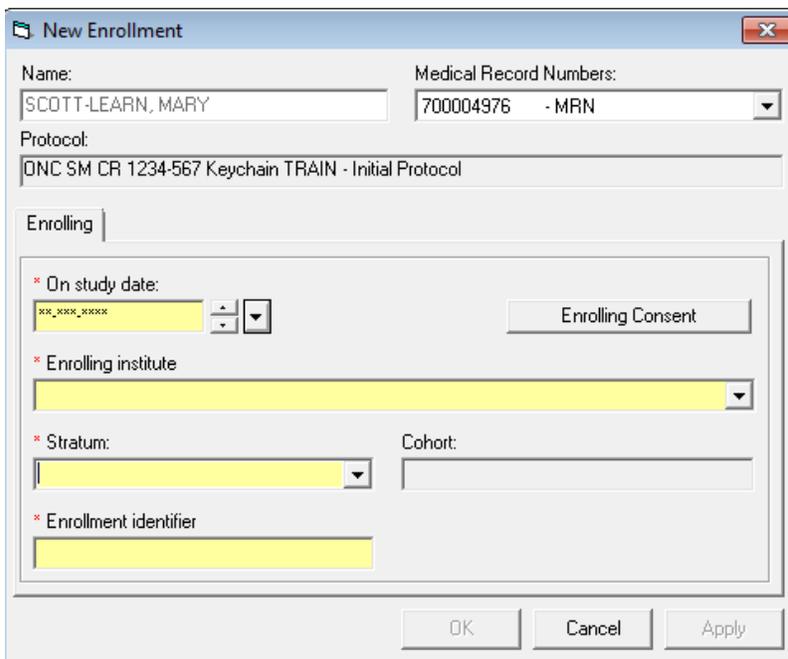
- 6 The **Patient Search** screen opens.



- 7 Type the patient’s surname in the **Name** field and then press **Enter**. Ensure to select the correct patient. Then, click **OK**.



- 10 The **New Enrollment** screen opens.

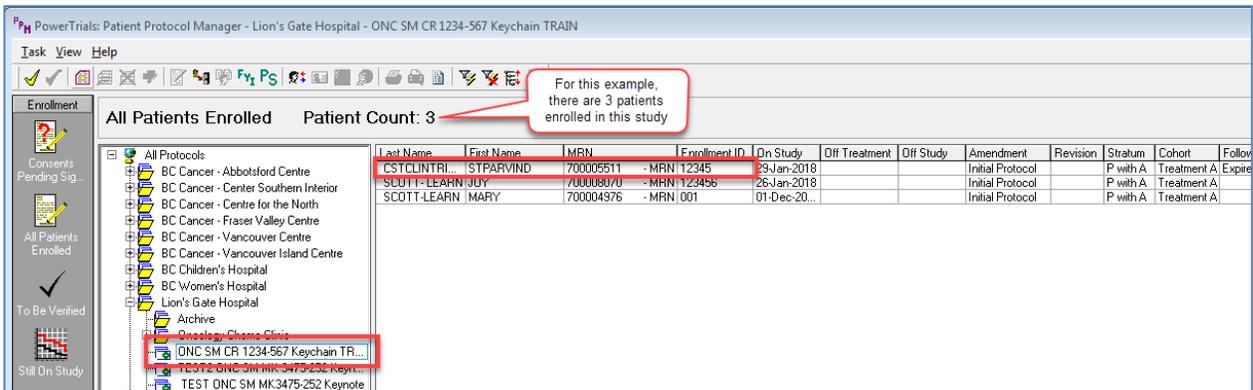


Note: Yellow fields indicate mandatory information is required. Type in the following information:

- **On study date** = type “T” for today’s date
- **Enrolling institute** = click the dropdown  icon and select *LGH Chemotherapy Clinic*
- **Stratum** = *P with A*, then a pop-up screen for **Cohorts** = *Treatment A*
- **Enrollment identifier (subject number)** = *12345*

Then, click **OK**

14 Now, the patient is listed in the All Patients Enrolled under the trial **ONC SM CR 1234-567 Keychain TRIAL**.



15 Click the **Close**  icon within the **PowerTrials: Patient Protocol Manager** to return to the patient’s chart.

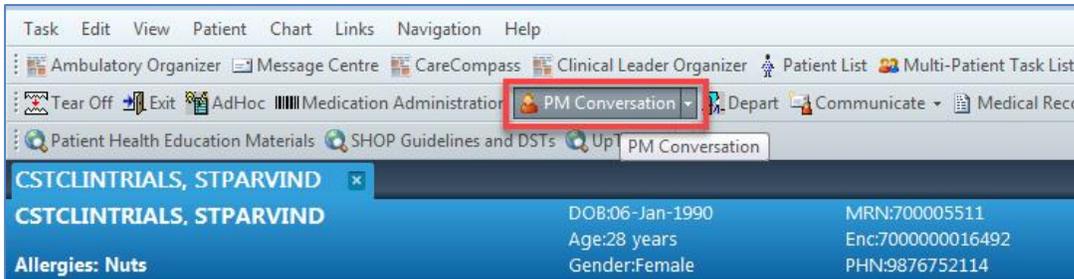
Key Learning Points

- Patients are enrolled in a study using the Patient Protocol Manager (PPM) application
- The patient and protocol are associated to the appropriate clinic location
- A patient must be enrolled in PPM prior to a provider placing a Research Powerplan order

Activity 3.3 – Adding a Process Alert to the Patient’s Chart

You would like to indicate to all staff viewing this patient’s chart that they are on a research study. To do this, add a process alert to the patient’s electronic chart by following the steps below.

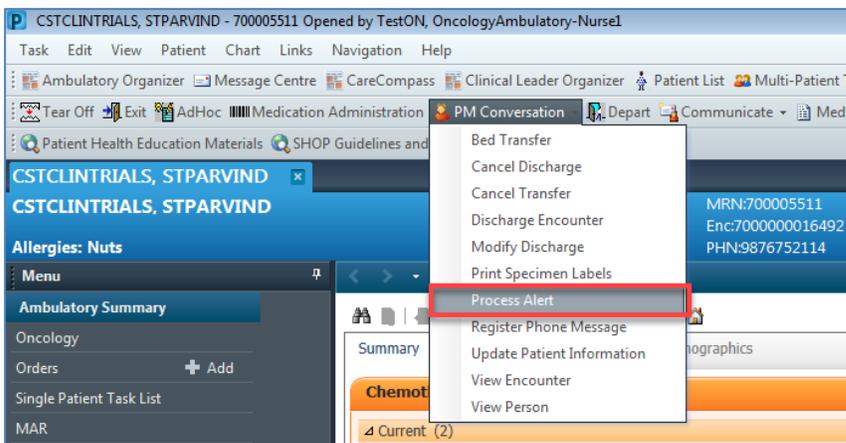
- 1 Switch back to the patient’s chart in PowerChart, navigate and locate the **PM Conversation** from the toolbar.



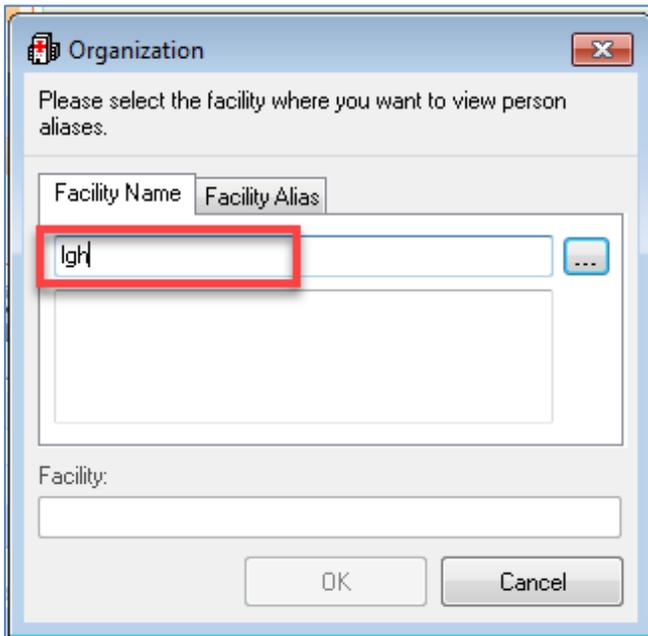
- 2 Click on the down arrow icon next to the **PM Conversation**



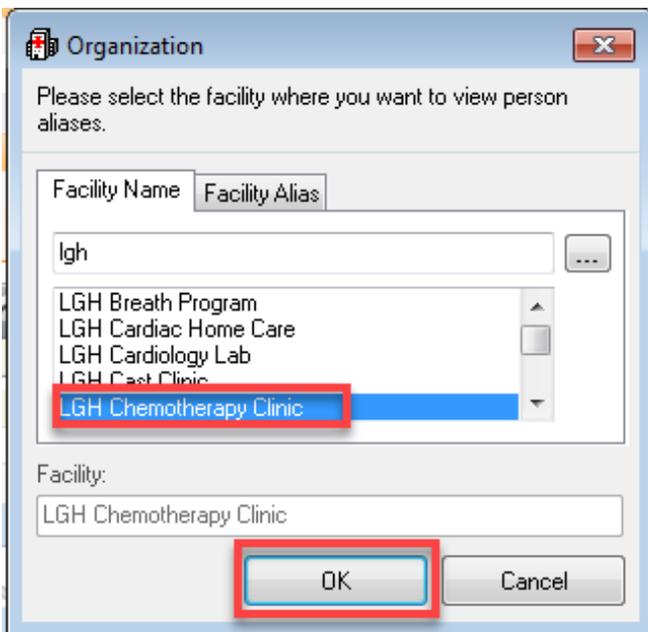
- 3 Select Process Alert



- 4 The **Organizer** pop-up screen appears. Type in **LGH** and then press **Enter**.



- 5 Select **LGH Chemotherapy Clinic** and then click **OK**



6 The **Process Alert** window appears. Click on the **Process Alert** box to activate the field.

The screenshot shows a 'Process Alert' window with the following fields:

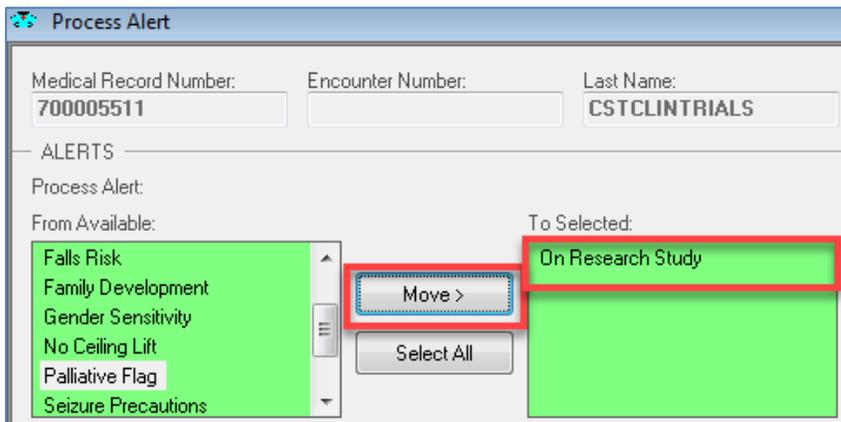
- Medical Record Number: 760001093
- Encounter Number: (empty)
- Last Name: ONCOLOGY-NURSEA
- First Name: GRETCHEN
- Middle Name: (empty)
- Preferred Name: (empty)
- Previous Last Name: Oncology-NurseA
- Date of Birth: 31-Jan-1969
- Age: 49Y
- Gender: Female
- BC PHN: 0760001093

Below the patient information is an 'ALERTS' section with a 'Process Alert:' label and a large empty text box. At the bottom right are 'Complete' and 'Cancel' buttons. The status bar at the bottom shows 'Ready', 'TRAIN1', 'TRAIN.NURSEONCAMB1', '09-Feb-2018', and '10:34'.

7 Use the scroll bar to locate the **On Research Study** alert.

The screenshot shows the 'Process Alert' window for patient CSTCLINTRIALS, STPARVIND. The 'ALERTS' section is active, showing a list of alerts under 'From Available:'. The 'On Research Study' alert is highlighted in blue. A red box highlights the scroll bar, and a red callout bubble with the text 'Scroll down' points to it. Other alerts in the list include Falls Risk, Family Development, Gender Sensitivity, No Ceiling Lift, and Palliative Flag. There are 'Move >' and 'Select All' buttons between the lists. The 'Selected:' area is currently empty.

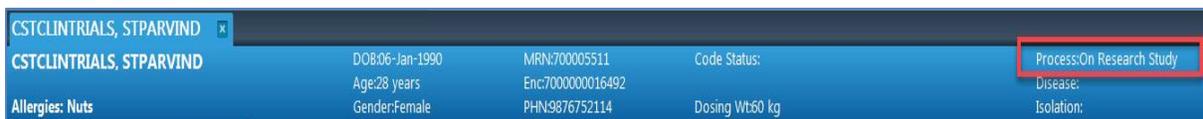
8 Select the **On Research study** and then click the **Move >** button. Once you see On Research Study in the To Selected: box click **Complete** in the bottom right hand corner.



9 Click **Refresh**  icon in the lower right hand corner from the blue banner bar.



10 You can now see your Process Alert on the Banner Bar



Note: Remember to repeat the same steps once the patient is no longer part of the study. This will remove Process Alert.

Key Learning Points

- Update the Process Alert to On Research Study once the patient is enrolled in the study
- Use the same steps when removing the Process Alert once the patient is no longer part of the study

■ PATIENT SCENARIO 4 – Navigation of the Clinical Research Component and Tab

Learning Objectives

At the end of this Scenario, you will be able to:

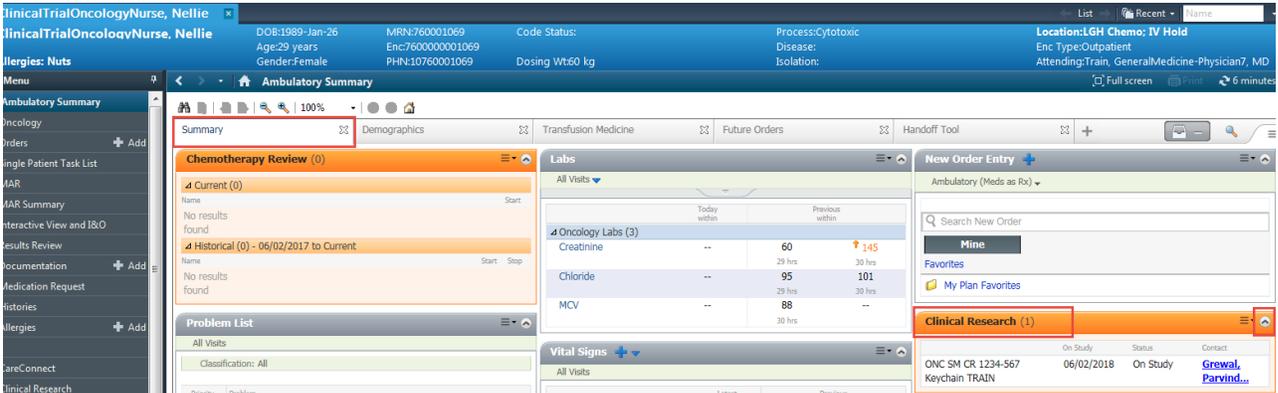
- Navigate the Clinical Research component of the Summary Page
- Access study related documents, in particular the consent information (not the signed consent form), and the prohibited medications list
- Access Study Team contact telephone numbers

BACKGROUND

The purpose of the Clinical Research component is to provide study specific quick information to the user such as protocol name, on and off study status and dates, and contact information of the study team. The component is hyperlinked to the Clinical Research tab, which provides the user with more information about the study including access to the Prohibited Medications List, consent information and phone numbers for the study team members.

Activity 4.1 – Navigating and Accessing Clinical Research Component

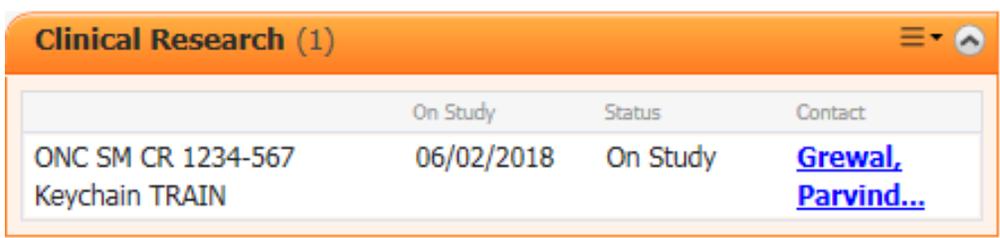
- 1 While you are in the patient’s chart, navigate to the **Summary** workflow page and locate the **Clinical Research** component. Click on the arrow, , within the component header to expand/collapse the component.



The screenshot shows the 'Ambulatory Summary' page for a patient named Nellie. The 'Clinical Research' component is expanded, displaying a table with the following data:

On Study	Status	Contact
ONC SM CR 1234-567 Keychain TRAIN	06/02/2018 On Study	Grewal, Parvind...

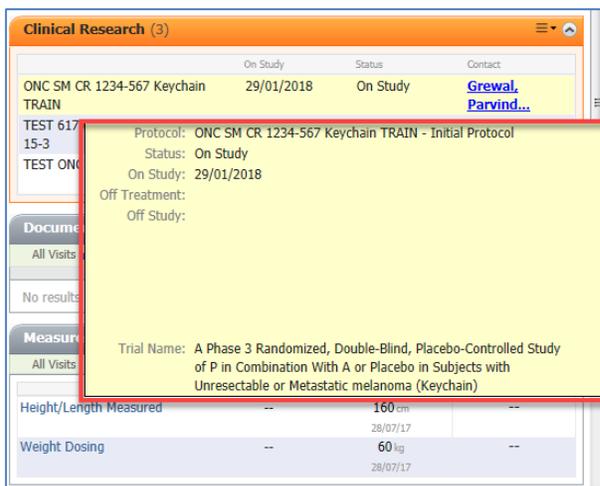
This should display the Study that you just enrolled your patient on.



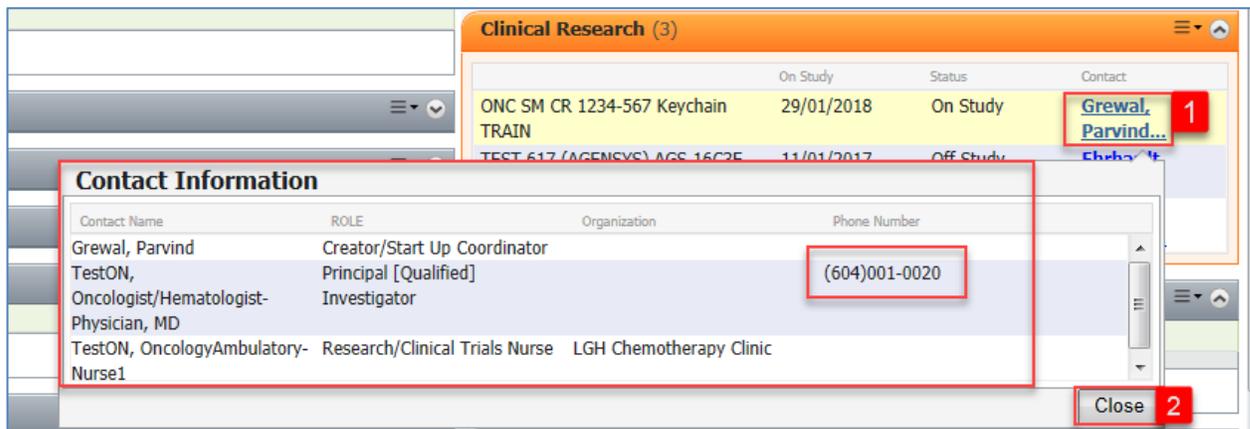
The close-up shows the 'Clinical Research (1)' header with a collapse arrow. Below it is a table with the following data:

On Study	Status	Contact
ONC SM CR 1234-567 Keychain TRAIN	06/02/2018 On Study	Grewal, Parvind...

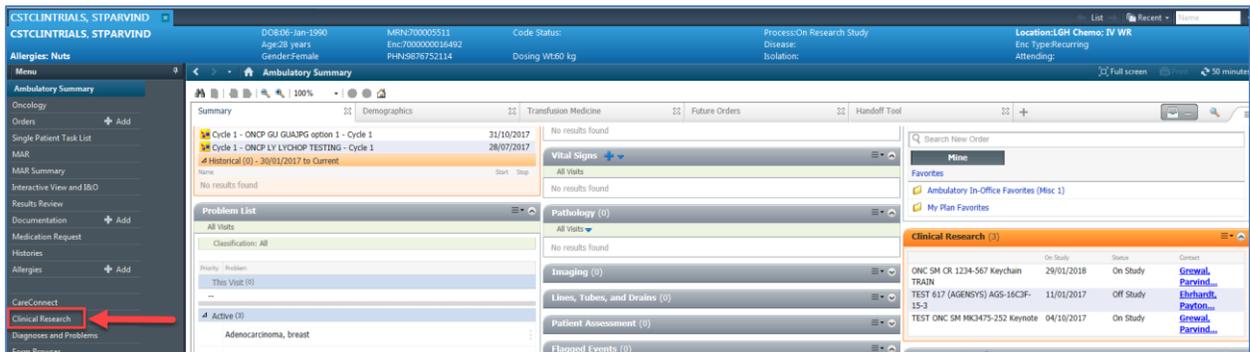
- 2 For practice, hover over the **ONC SM CR 1234-567 Keychain TRAIN** and see the details.



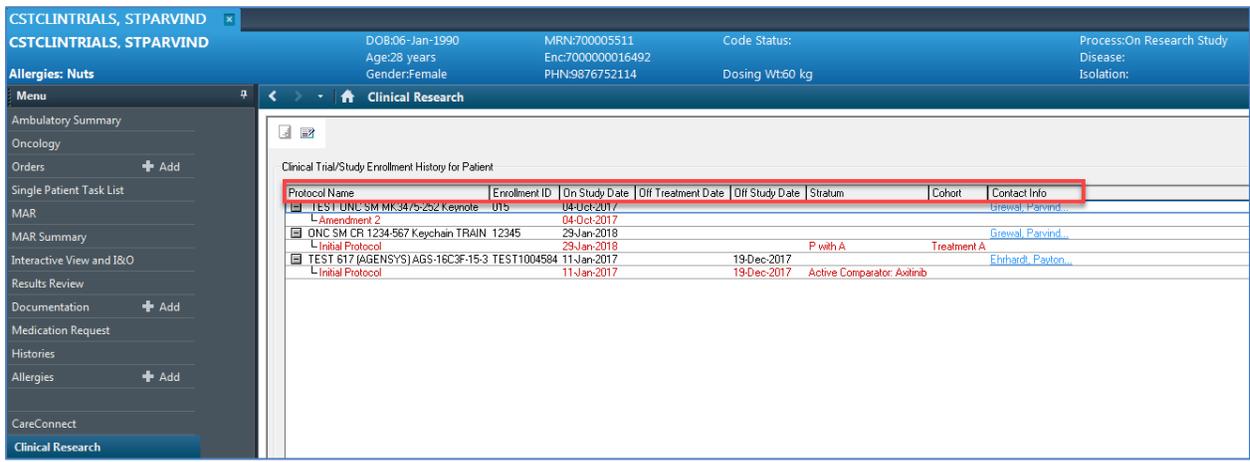
- 3
1. Click on the **Contact** person for the **ONC SM CR 1234-567 Keychain TRAIN**
 2. The **Contact Information** appears. After you finish reviewing, click on the **Close** button.



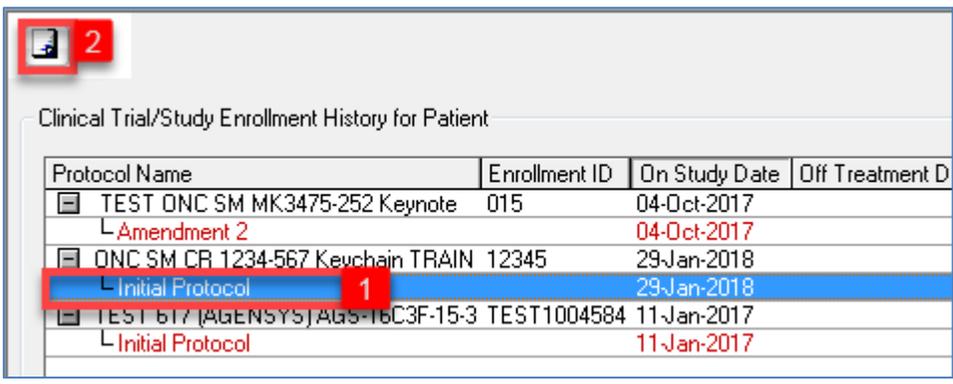
4 Click on the **Clinical Research** component header.



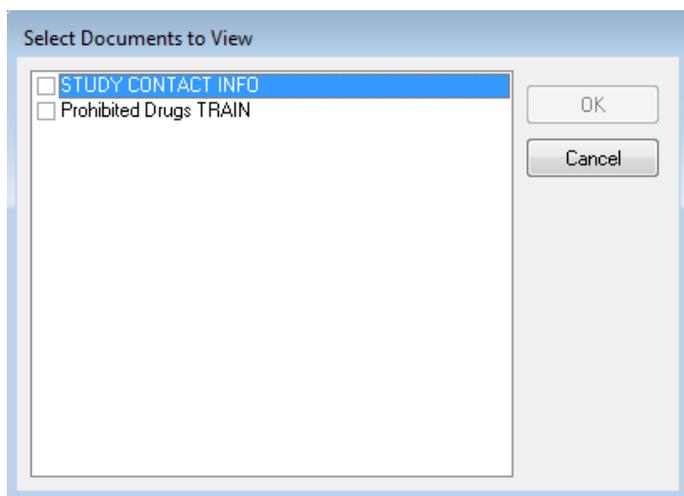
5 The Clinical Research tab of the chart opens and displays the **Clinical Trial/Study Enrollment History for Patient** window. Review the column headers to see the important information that can be viewed here.



1. Click on the **Initial Protocol** under the **ONC SM CR 1234-567 Keychain TRAIN** study
2. Click on the **Documents** icon

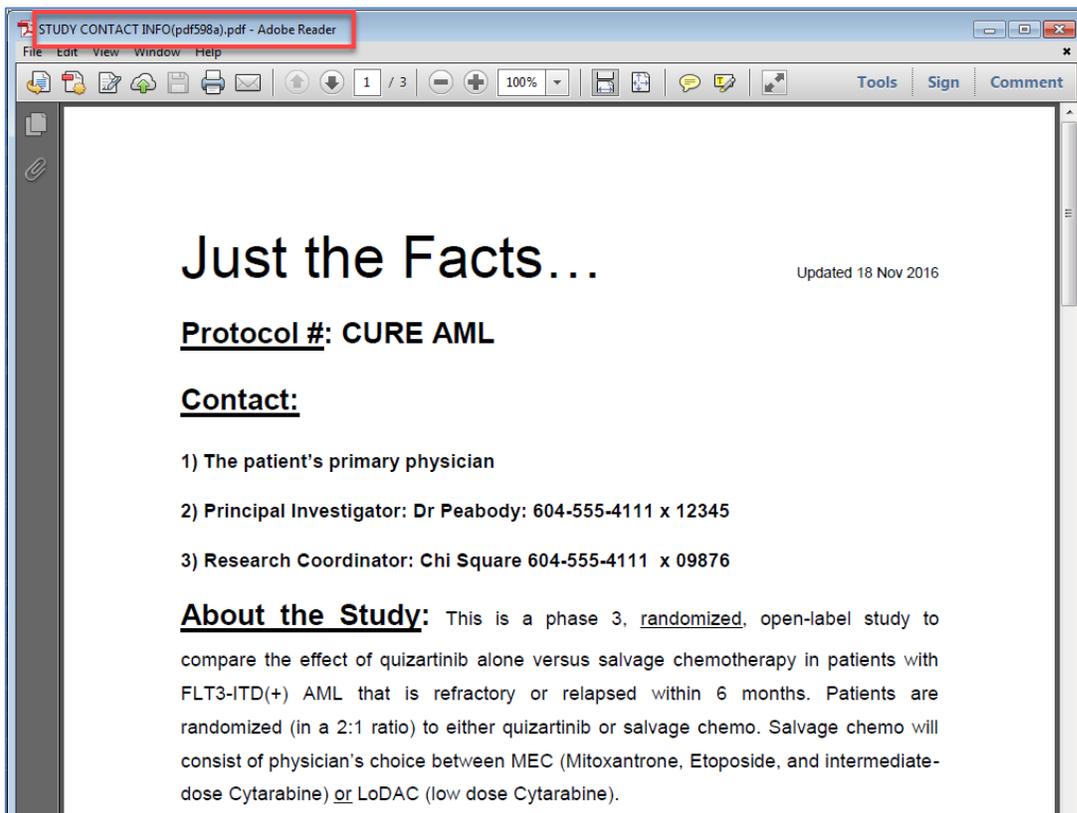


7 The Select Documents to View screen appears.

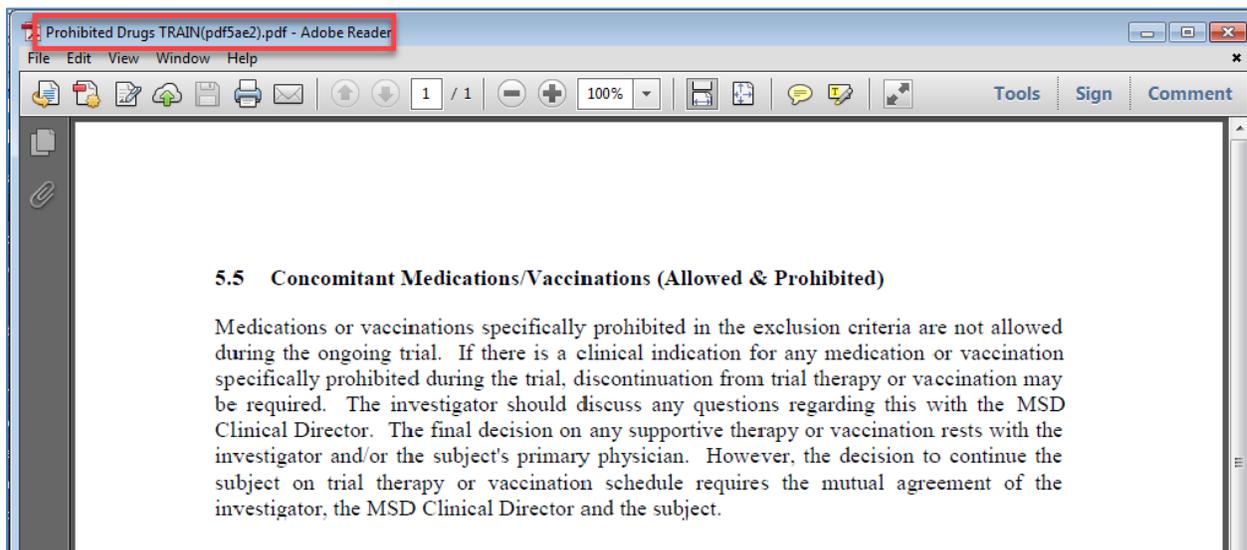


For practice, go ahead and select one or both selections by ticking the box(es) and then clicking the **OK** button. The PDF file(s) will open. After reviewing, you can click the **Close**  icon.

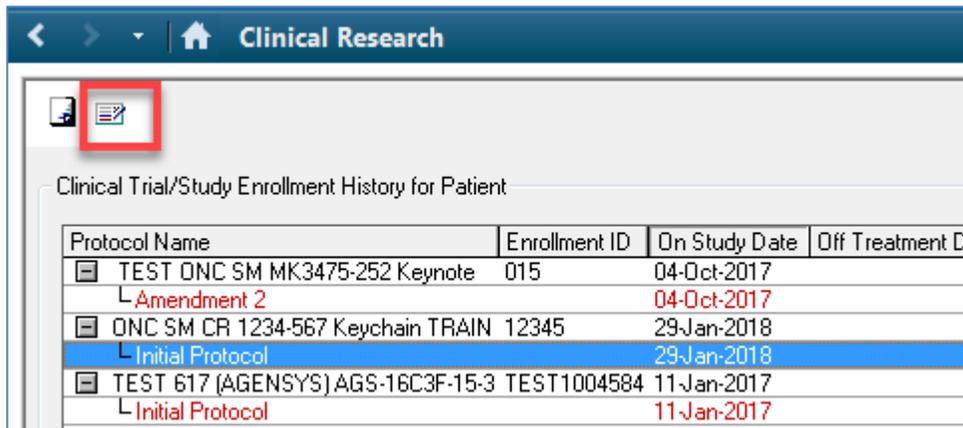
Below is an example of the **Study Contact Information**:



Here's an example of the **Prohibited Drugs**:



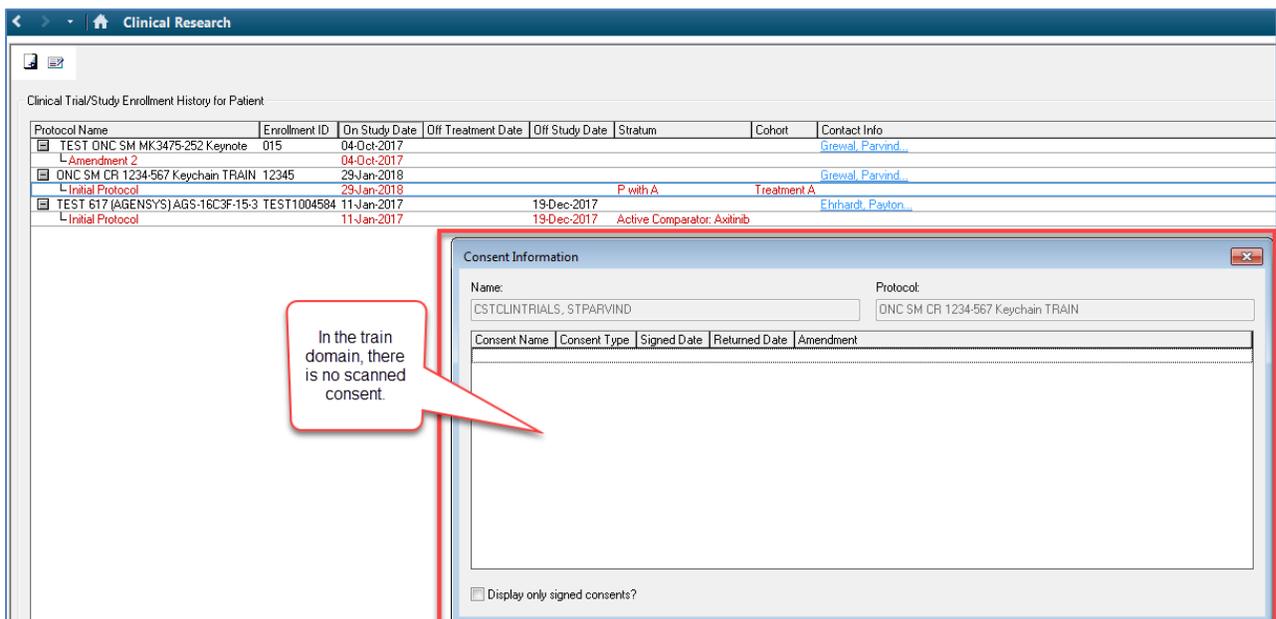
- 8 To view the consent information (dates that the patient was consented), click on the  icon.



Clinical Trial/Study Enrollment History for Patient

Protocol Name	Enrollment ID	On Study Date	Off Treatment Date
TEST ONC SM MK3475-252 Keynote	015	04-Oct-2017	
Amendment 2		04-Oct-2017	
ONC SM CR 1234-567 Keychain TRAIN	12345	29-Jan-2018	
Initial Protocol		29-Jan-2018	
TEST 617 (AGENSYS) AGS-16C3F-15-3 TEST1004584		11-Jan-2017	
Initial Protocol		11-Jan-2017	

- 9 The **Consent Information** pop-up screen appears.



Clinical Trial/Study Enrollment History for Patient

Protocol Name	Enrollment ID	On Study Date	Off Treatment Date	Off Study Date	Stratum	Cohort	Contact Info
TEST ONC SM MK3475-252 Keynote	015	04-Oct-2017					Grewal, Parvind
Amendment 2		04-Oct-2017					
ONC SM CR 1234-567 Keychain TRAIN	12345	29-Jan-2018					Grewal, Parvind
Initial Protocol		29-Jan-2018			P with A	Treatment A	
TEST 617 (AGENSYS) AGS-16C3F-15-3 TEST1004584		11-Jan-2017		19-Dec-2017			Ehrhardt, Payton
Initial Protocol		11-Jan-2017		19-Dec-2017	Active Comparator: Axitinib		

Consent Information

Name: CSTCLINTRIALS, STPARVIND Protocol: ONC SM CR 1234-567 Keychain TRAIN

Consent Name	Consent Type	Signed Date	Returned Date	Amendment
--------------	--------------	-------------	---------------	-----------

Display only signed consents?

In the train domain, there is no scanned consent.

Key Learning Points

- The Clinical Research component will provide a brief summary of the study and the contact information of the Study Team members
- The Clinical Research component is hyperlinked to the Clinical research tab in the chart where you can view consent information, the enrollment history and access the prohibited medications list.

■ PATIENT SCENARIO 5 – Order Management

Learning Objectives

At the end of this Scenario, you will be able to:

- Support a Provider in placing orders for a ResearchPowerPlan
- Review the Patient Order Profile
- Place an AdHoc order

Background

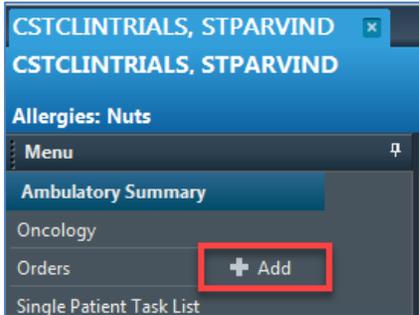
You are ready to support a provider in placing a Screening PowerPlan order in the patient’s chart. You will also place an additional order for Tylenol, as your patient has complained of a mild headache near the end of the drug administration

- The Research Nurses does not independently place Research PowerPlan orders; however it is useful to know how the orders are placed since you will be working closely together to support the provider in placing these types of orders.
- As a research nurse you have the ability to view a Research PowerPlan, and verify it is the correct one for that Phase of the study.
- The naming convention is Research_Department_Tumor Type_Protocol Name or #_phase of study treatment (e.g. Research Onc GU Screening; cycle 1)
- If the PowerPlan only has Prescriptions ordered (no IV meds to be administered), the Provider will print and give the prescription to the patient.
- Verbal and phone orders that are entered in the system automatically get routed to the ordering provider for co-signature. These orders are only encouraged when a physician cannot enter the order directly into the Clinical Information System (CIS) themselves.

Activity 5.1 – Placing Orders

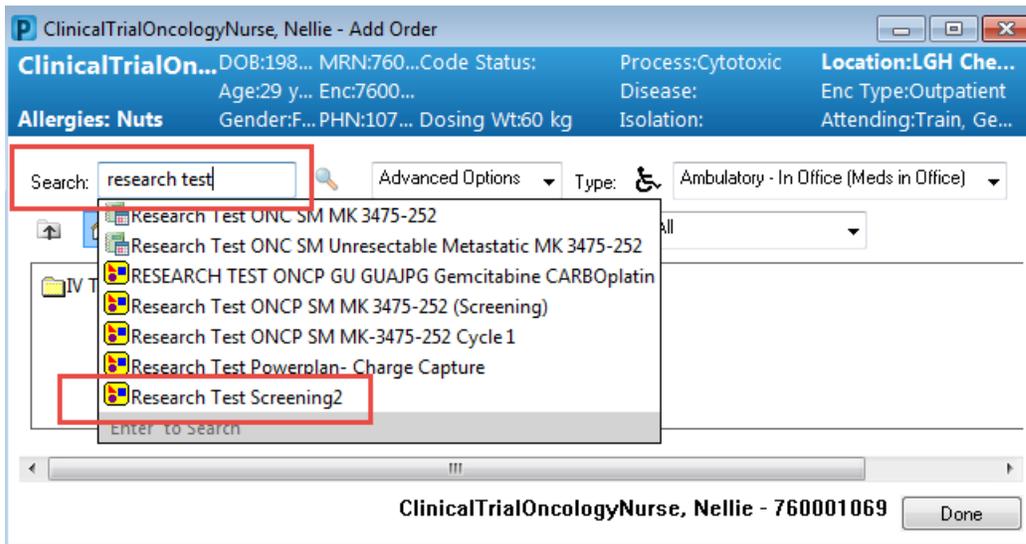
1

From the patient's chart click on the  button from the **Orders** tab in the menu.



2

The **Add Order** screen appears. Type in *Research Test* into the **Search** field. A list of research related orders display. Select **Research Test Screening2**.



3 The **Ordering Physician** screen appears, fill in the following required information:

- Type the surname of the attending provider. Use PLISVCW, Tyler for today.
- Select **No Cosignature Required**.

Click **OK**.

P Ordering Physician

Research Test Screening2

***Physician name**

Plisvcw, Tyler, MD

***Order Date/Time**

2018-Feb-06 0931 PST

***Communication type**

Phone
Verbal
No Cosignature Required
Cosignature Required
Paper/Fax
Electronic

OK Cancel

- The **Add Plan** screen appears. Type the provider name (PLISVCW, Tyler) in the **Review Provider** field, click on the  button and click **OK**.

CSTCLINTRIALS, STPARVIND - Add Plan

Research Test ONCP SM MK 3475-252 (Screening)

Enter Cycle

Last ordered:
Research Test ONCP SM MK 3475-252 (Screening) - Cycle 3
by TestON, Oncologist/Hematologist-Physician, MD on 12-Dec-2017 10:49 PST

Select Visit and Start Time

This Visit
 Future Inpatient Visit
 Future Outpatient Visit

Estimated Start Date of Diagnostics (Day 1)

In Day(s)
 In Week(s)
 In Month(s)

Est. start 31-Jan-2018 0800 PST

Confirm Phase Action

Phase	Start Date/Time	Action
☐ Diagnostics (Day 1)	*Est. 31-Jan-2018 08:00 PST	Order for future visit

Additional Review Settings

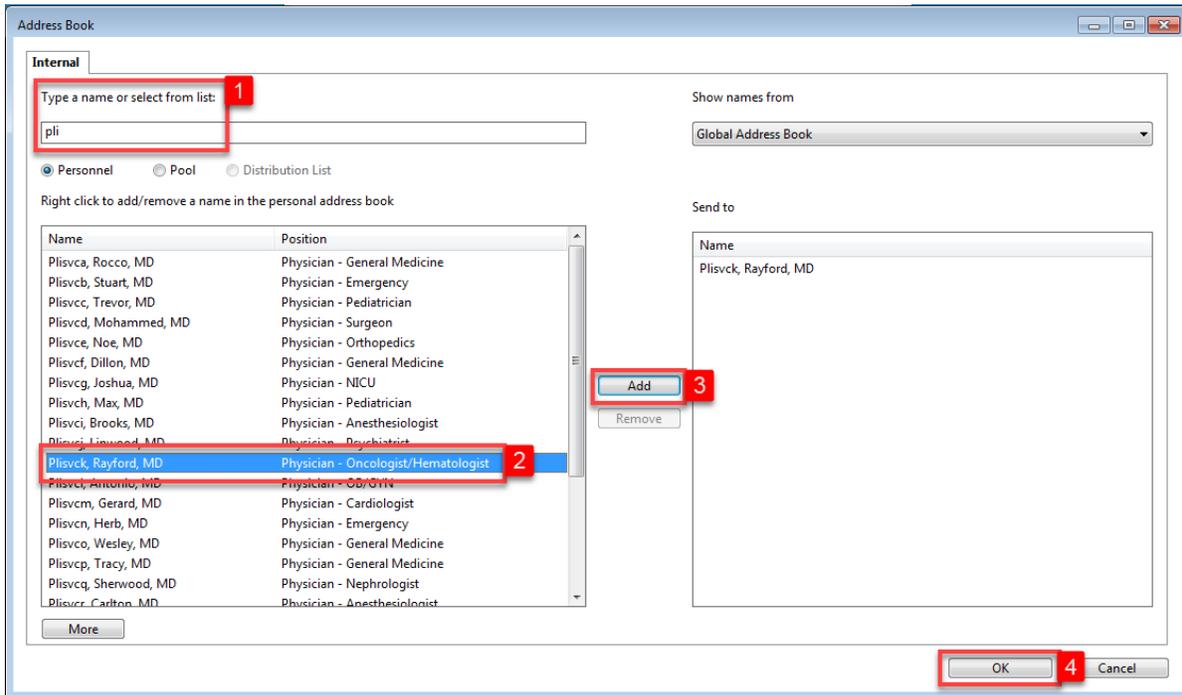
Review Required

Review Provider 

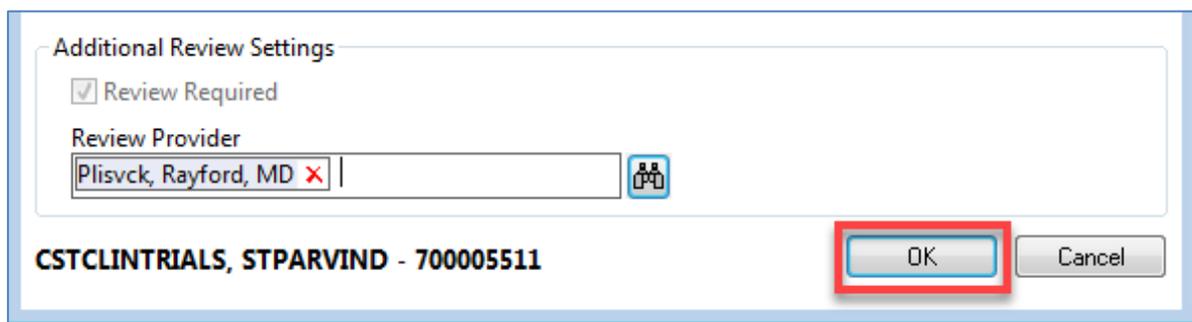
CSTCLINTRIALS, STPARVIND - 700005511

Note: If you need to search for the provider’s name, click the  icon and the **Address Book** pop-up screen appears.

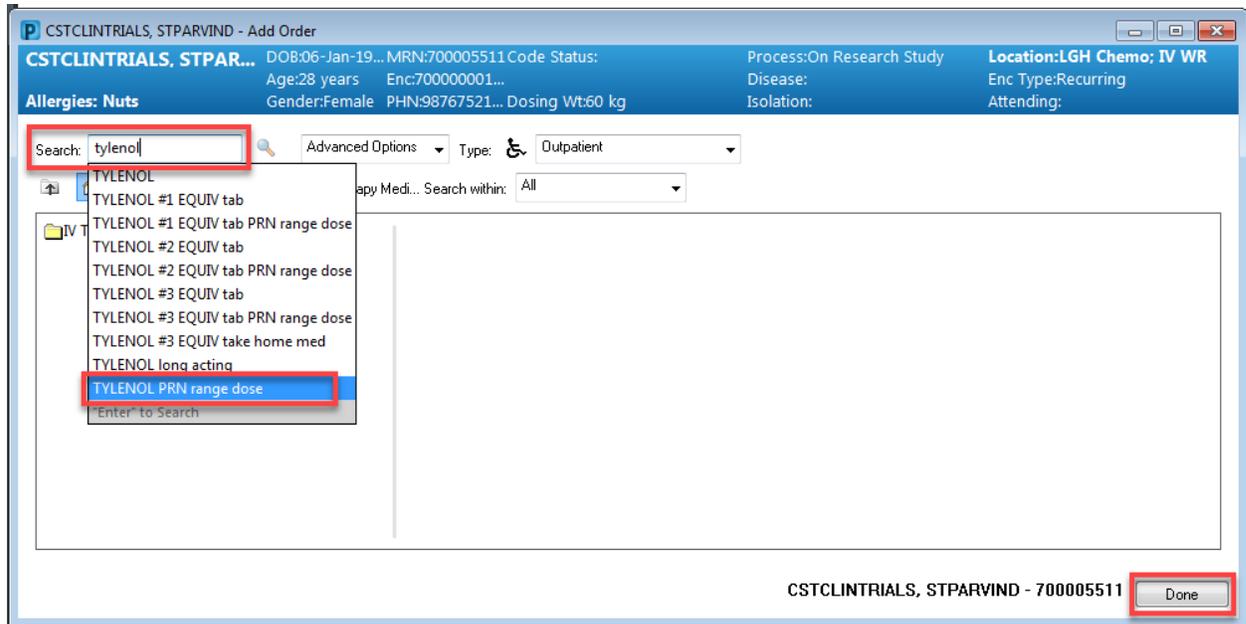
1. Type in the name of the provider in the **Type a name or select from list** field
2. Select the provider's name
3. Click the **Add** button
4. Click **OK**



Click **OK**



- 7 This will take you back to the **Add Order** screen. Do not click Done yet, as you will place another order for **Tylenol** by repeating the same steps. For your practice, select **TYLENOL PRN range dose**. Selecting from the available order sentences will help to pre-fill order details. Click **Done**.

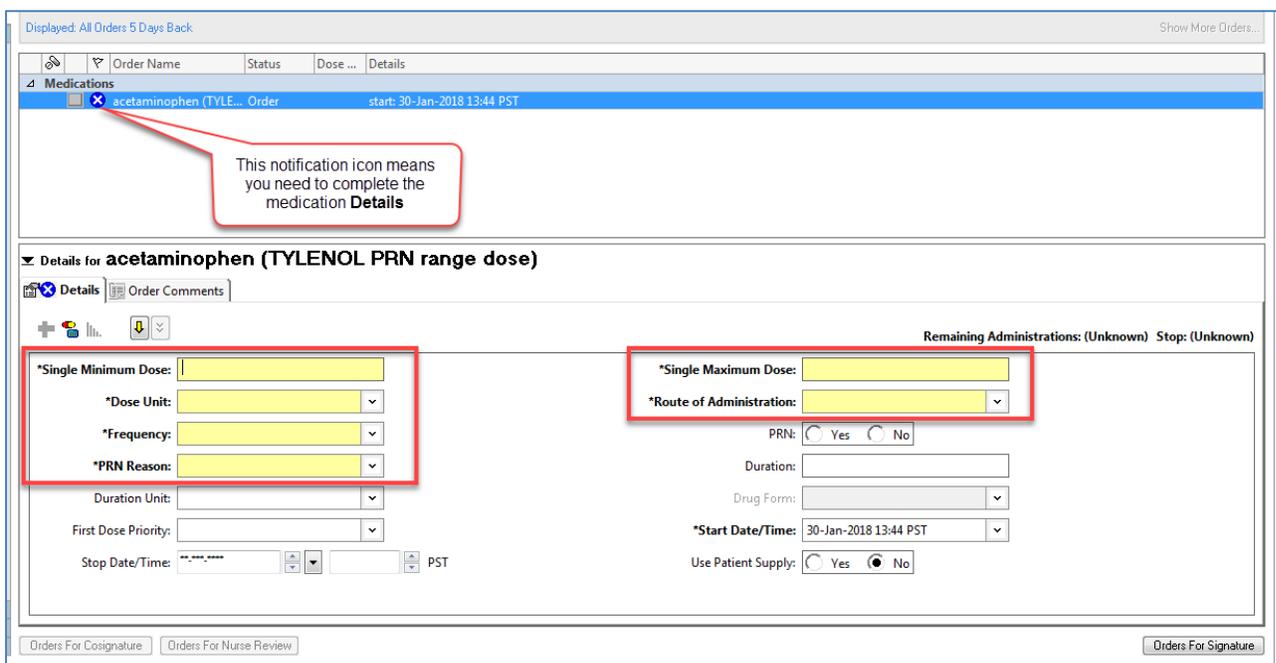


Note: The more detailed order sentence you select the less details you will be required to fill prior to signing the order.

8 The Details for acetaminophen (TYLENOL PRN range dose) displays.

For practice, fill in the following information:

- **Single Minimum Dose = 650**
- **Dose Unit = mg**
- **Frequency = once**
- **PRN Reason = headache**
- **Single Maximum Dose = 650**
- **Route of Administration = PO**



Displayed: All Orders 5 Days Back Show More Orders...

Order Name	Status	Dose ...	Details
acetaminophen (TYLE... Order			start: 30-Jan-2018 13:44 PST

This notification icon means you need to complete the medication **Details**

Details for acetaminophen (TYLENOL PRN range dose)

Remaining Administrations: (Unknown) Stop: (Unknown)

*Single Minimum Dose:

*Dose Unit:

*Frequency:

*PRN Reason:

Duration Unit:

First Dose Priority:

Stop Date/Time: PST

*Single Maximum Dose:

*Route of Administration:

PRN: Yes No

Duration:

Drug Form:

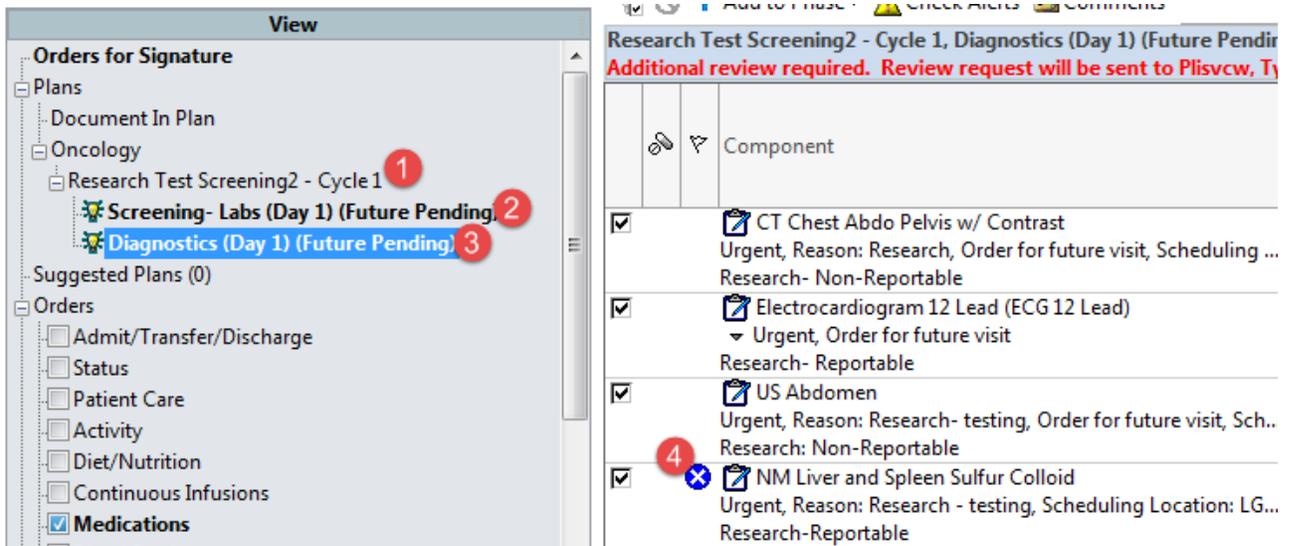
*Start Date/Time: 30-Jan-2018 13:44 PST

Use Patient Supply: Yes No

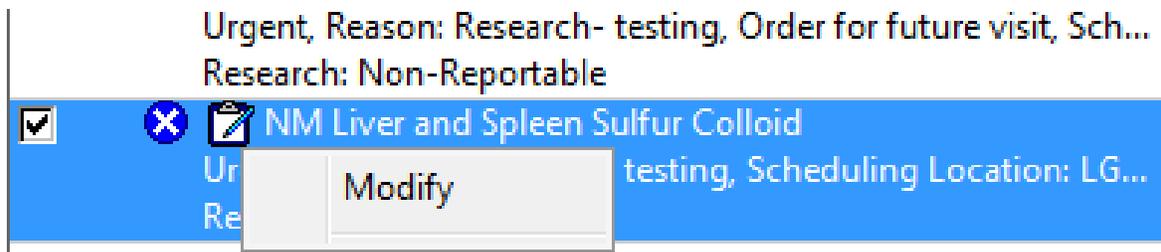
Orders For Cosignature | Orders For Nurse Review Orders For Signature

Note: Do not click on the **Orders for Signature** yet, as you still need to complete the Research Screening PowerPlan.

- 9 In the View pane, locate the Research Test Screening2 orders. Click on the Screening-Labs and review the orders. Now click on the Diagnostics. Notice the missing details  icon next to the NM Liver and Spleen Sulfur Colloid.



- 10 Right-click and select **Modify**.



Note: You may also double click on the details missing icon.

11 The Details for NM Liver and Spleen Sulfur Colloid displays.

Now, go ahead and fill in the following information:

- **Pregnant = No**
- **Breastfeeding = No**

The screenshot shows a list of medical orders. The selected order is 'NM Liver and Spleen Sulfur Colloid'. Below the list, the 'Details for NM Liver and Spleen Sulfur Colloid' form is open. In this form, the 'Reason for Exam' is 'Research - testing', 'Priority' is 'Urgent', and 'Weight (kg)' is '60'. The 'Pregnant' and 'Breastfeeding' fields are both set to 'No' and are highlighted with a red rectangular box. Other fields include 'Requested Start Date/Time', 'Special Instructions / Notes to Scheduler', 'Provider Callback Number', 'CC Provider 1', 'CC Provider 2', and 'Scheduling Location' (set to 'LGH Med Imaging').

After completing the **details**, the  icon disappears.

This screenshot shows the same order list as the previous image. The 'NM Liver and Spleen Sulfur Colloid' order is now highlighted in blue. A red callout box with white text points to this order, stating: 'The **Notification** icon has disappeared after completing the **Details** for'. The details form for this order is visible below the list, showing the 'Details' tab is active.

12 Now, you can go ahead and click the **Orders for Signature**

Component	Status	Dose ...	Details
Research Test ONCP SM MK 3475-252 (Screening) - Cycle 4, Diagnostics (Day 1) (Future Pending) *Est. 31-Jan-2018 08:00 PST - 21 Days Additional review required. Review request will be sent to Plisvck, Rayford, MD.			
<input checked="" type="checkbox"/> CT Chest Abdo Pelvis w/ Contrast			Urgent, Reason: Research, Order for future visit, Scheduling Locations: LGH Med Imaging, Research Study: Test Research ... Research- Non-Reportable
<input checked="" type="checkbox"/> Electrocardiogram 12 Lead (ECG 12 Lead)			Urgent, Order for future visit Research- Reportable
<input checked="" type="checkbox"/> US Abdomen			Urgent, Reason: Research- testing, Order for future visit, Scheduling Location: LGH Med Imaging Research: Non-Reportable
<input checked="" type="checkbox"/> NM Liver and Spleen Sulfur Colloid			T,N, Urgent, Reason: Research - testing, Weight: 60, Height: 160, Order for future visit, Scheduling Location: LGH M... Research-Reportable

Details for NM Liver and Spleen Sulfur Colloid

Details | Order Comments | Offset Details

Requested Start Date/Time: [Date/Time] PST ***Priority:** Urgent

***Reason for Exam:** Research - testing **Special Instructions / Notes to Scheduler:** [Text Area]

***Pregnant:** Yes No ***Weight (kg):** 60

***Breastfeeding:** Yes No **Special Handling:** [Dropdown]

Provider Callback Number: [Text Field] **CC Provider 2:** [Text Field]

CC Provider 1: [Text Field] ***Scheduling Location:** LGH Med Imaging

CC Provider 3: [Text Field]

Orders For Cosignature | Orders For Nurse Review | Save as My Favorite | **Orders For Signature**

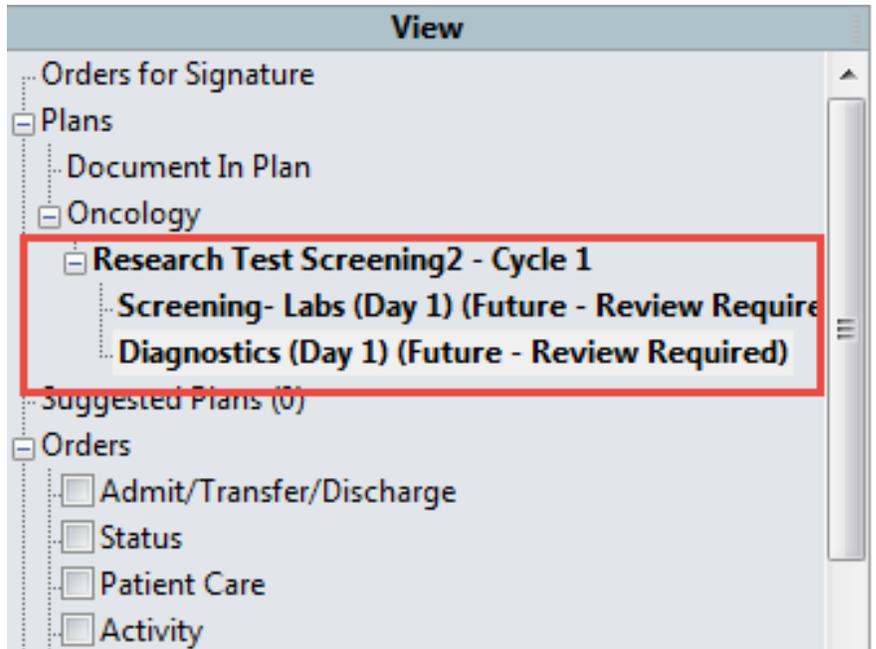
13 Click Sign

Order Name	Status	Start	Details
LGH Chemo; IV WR Enc:7000000016492 Admit: 12-Dec-2017 10:45 PST			
Medications acetaminophen (TYLE... Order 30-Jan-2018 13:44 ... dose range: 650 to 650 mg, PO, once, PRN headache, start: 30-Jan-2018 13:44 PST			
Future Diagnostic Tests			
CT Chest Abdo Pelvis w/ Contrast	Order	31-Jan-2018 08:00 PST	31-Jan-2018, Urgent, Reason: Research, Order for future visit, Scheduling Location: LGH Med Imaging, Research Study: Test Research Account; 123... Research- Non-Reportable
Electrocardiogram 12 Lead (ECG 12 Lead)	Order	31-Jan-2018 08:00 PST	31-Jan-2018, Urgent, Order for future visit Research- Reportable
US Abdomen	Order	31-Jan-2018 08:00 PST	31-Jan-2018, Urgent, Reason: Research- testing, Order for future visit, Scheduling Location: LGH Med Imaging Research: Non-Reportable
NM Liver and Spleen Sulfur Colloid	Order	31-Jan-2018 08:00 PST	31-Jan-2018, Urgent, Reason: Research - testing, Weight: 60, Height: 160, Order for future visit, Scheduling Location: LGH Med Imaging, Research ... Research-Reportable

Details

0 Missing Required Details | Orders For Cosignature | Orders For Nurse Review | **Sign**

- 14 Click the **Refresh**  icon, and now the order status has changed from Future Pending, to Future – Review Required.



Key Learning Points

- The Clinical Research Nurse can support the provider in placing Research orders.
- You will need to complete all missing details before you are permitted to sign an order.
- The naming convention for Research PowerPlans is: Research_Department_Tumor Type_Protocol Name or #_phase of study
- Order sentences help to pre-fill order details.

■ PATIENT SCENARIO 6 – Taking a Patient Off a Study using PPM

Learning Objectives

At the end of this Scenario, you will be able to:

- Discontinue the patient from study in the PPM

BACKGROUND

As a Clinical Research Nurse one of your responsibilities will be to take a patient off a study. It is important to remember to update the process alert within the chart to reflect the patient is off study to all other healthcare members.

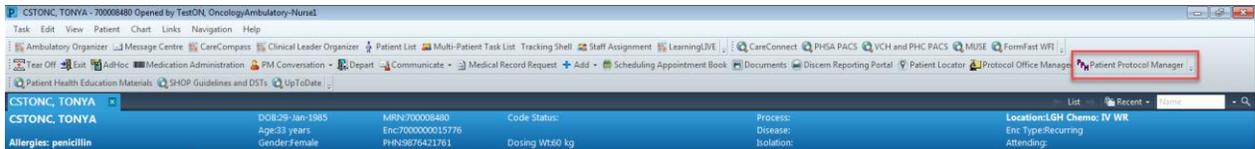
As a Clinical Research Nurse, you will complete the following activities:

- Discontinuing a patient from a study on PPM
- Remove the Process Alert in PowerChart
- Navigate to the Clinical Research Widget to note changes once a patient is off study

Activity 6.1: Discontinue a Patient in PPM

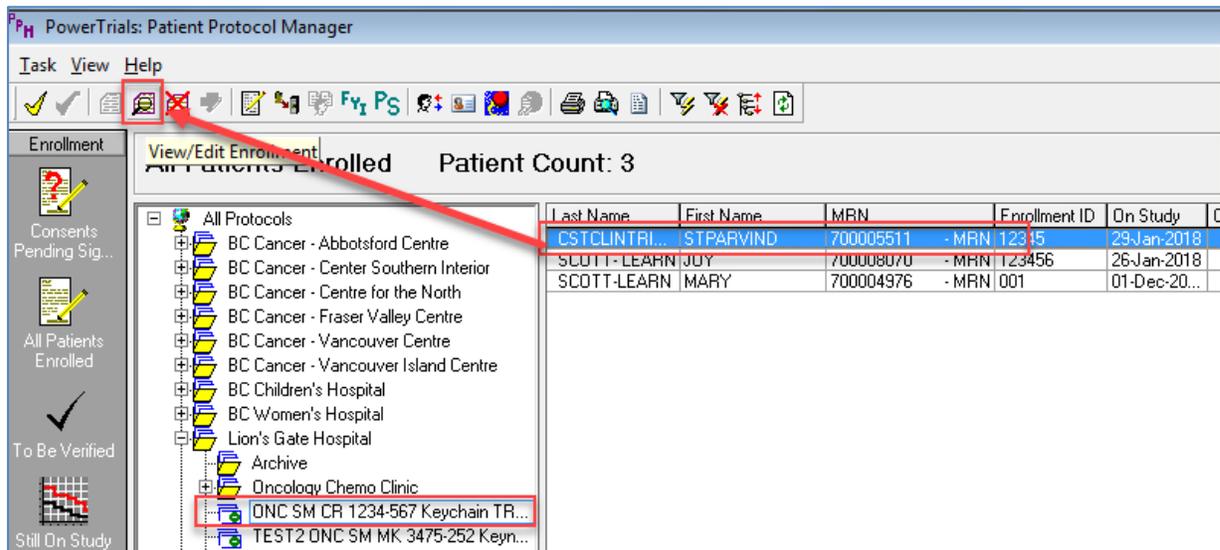
- 1 Remember how you access the PPM from Scenario 2. However for today your facilitator has helped you to access this application.

Please navigate to the **Patient Protocol Manager (PPM)** now.



- 2 Locate the **ONC SM CR 1234-567 Keychain TRAIN** under **Lion's Gate Hospital** tree folder and select your patient's name.

- 3 Click on the **View/Edit Enrollment** icon



4 The **Current Enrollment** screen appears. Click the **Off Study** tab.

Current Enrollment

Name: CSTCLINTRIALS, STPARVIND Medical Record Numbers: 700005511 - MRN

Protocol: ONC SM CR 1234-567 Keychain TRAIN - Initial Protocol

Enrolling | Off Treatment | **Off Study**

* Off study date:

* Removal person:

* Removal institute:

Removal reason:

Current enrollment information

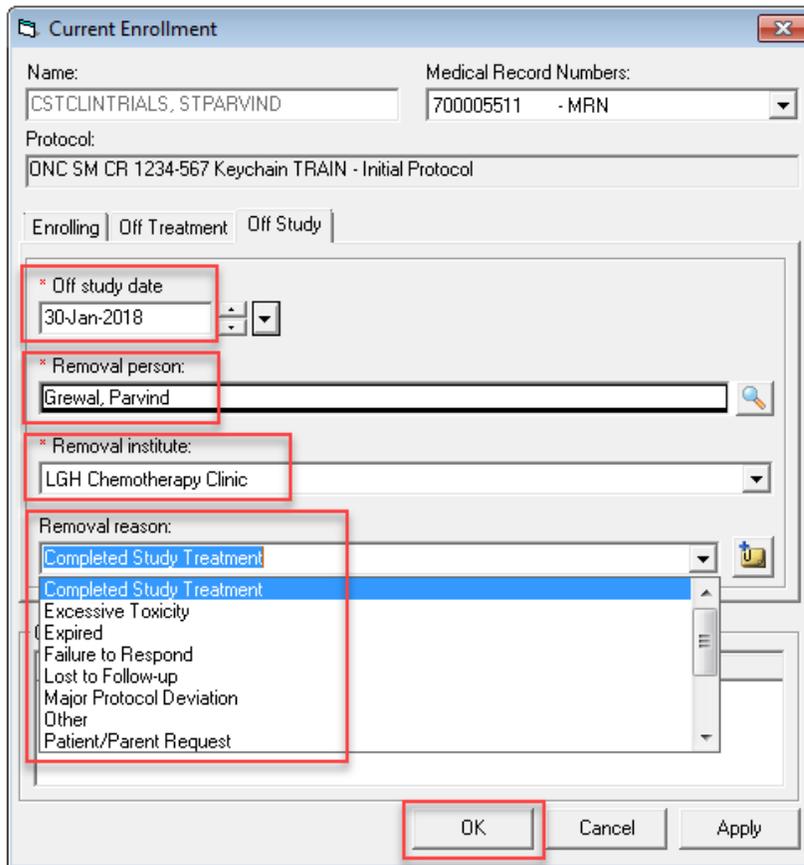
Protocol/Amendment/Revision	On study date	Enrollment Id
Initial Protocol	29-Jan-2018	12345

OK Cancel Apply

Fill the following information:

- **Off study date** = Type "T" for today's date
- **Removal person** = for this example, *Grewal, Parvind* is the study contact person
- **Removal institute** = use the dropdown key and select *LGH Chemotherapy Clinic*
- **Removal reason** = *Completed study treatment*

See the completed screenshot below:



Current Enrollment

Name: CSTCLINTRIALS, STPARVIND Medical Record Numbers: 700005511 - MRN

Protocol: DNC SM CR 1234-567 Keychain TRAIN - Initial Protocol

Enrolling | **Off Treatment** | Off Study

* Off study date: 30-Jan-2018

* Removal person: Grewal, Parvind

* Removal institute: LGH Chemotherapy Clinic

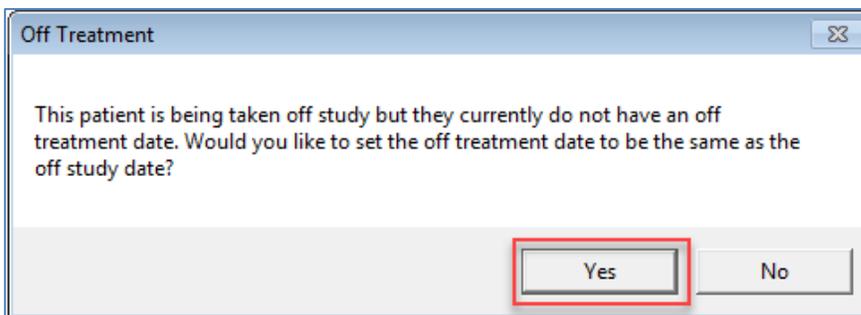
Removal reason: **Completed Study Treatment**

- Completed Study Treatment
- Excessive Toxicity
- Expired
- Failure to Respond
- Lost to Follow-up
- Major Protocol Deviation
- Other
- Patient/Parent Request

OK Cancel Apply

Then, click **OK**

- The **Off Treatment** pop-up screen appears. For this activity, click the **YES** button.



Off Treatment

This patient is being taken off study but they currently do not have an off treatment date. Would you like to set the off treatment date to be the same as the off study date?

Yes No

6 Now, review the patient’s status.

All Patients Enrolled Patient Count: 3

	Last Name	First Name	MRN	Enrollment ID	On Study	Off Treatment	Off Study	Amendment	Revision	Stratum	Cohort	
	CSTCLINTRI...	STPARVIND	700005511	- MRN 12345	29-Jan-2018	30-Jan-2018	30-Jan-2018	Initial Protocol			P with A	Treatment A
	SCUITT-LEAHN	JUDY	700008070	- MRN 123456	26-Jan-2018			Initial Protocol			P with A	Treatment A
	SCOTT-LEARN	MARY	700004976	- MRN 001	01-Dec-20...			Initial Protocol			P with A	Treatment A

Now the date appears for both **Off Treatment** and **Off Study**

7 You can minimize  the **PPM** for now and return to the patient’s chart.

5 Remember how to update the **Process Alert**?

For guidance, refer to **Activity 2.3** when removing **On Research Study** Process Alert in the patient’s banner bar.

6 Remember how to review the **Clinical Research** component?

Refresh first and then you will see that your patient is now **Off Study**.



	On Study	Status	Contact
ONC SM CR 1234-567 Keychain TRAIN	29/01/2018	On Study	Grewal, Parvind...
TEST 617 (AGENSYS) AGS-16C3F-15-3	11/01/2017	Off Study	Ehrhardt, Payton...
TEST ONC SM MK3475-252 Keynote	04/10/2017	On Study	Grewal, Parvind...

Key Learning Points

- Use the Patient Protocol Manager (PPM) to remove the patient from the study
- Ensure to update the Process Alert by removing the On Research Study
- Review the Clinical Research component to ensure that the patient is Off Study

PATIENT SCENARIO 7 – Accessing the Research Billing Report

Learning Objectives

At the end of this Scenario, you will be able to:

- Access and execute the Research Billing Report for billing to Sponsors

BACKGROUND

The purpose of the Research Billing Report is to track and collect all research billing orders for invoicing to Sponsors.

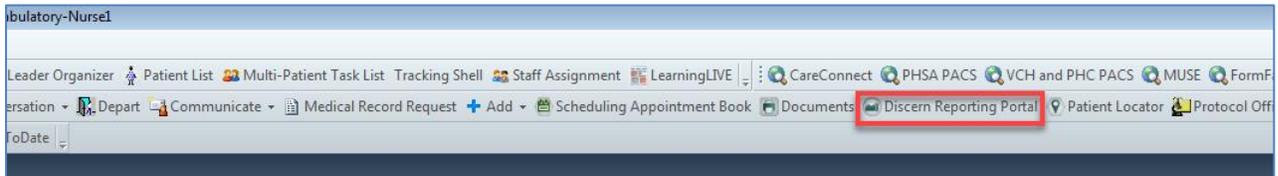
As a Clinical Research Nurse, you will complete the following activities:

- Access the Discern Reporting Portal

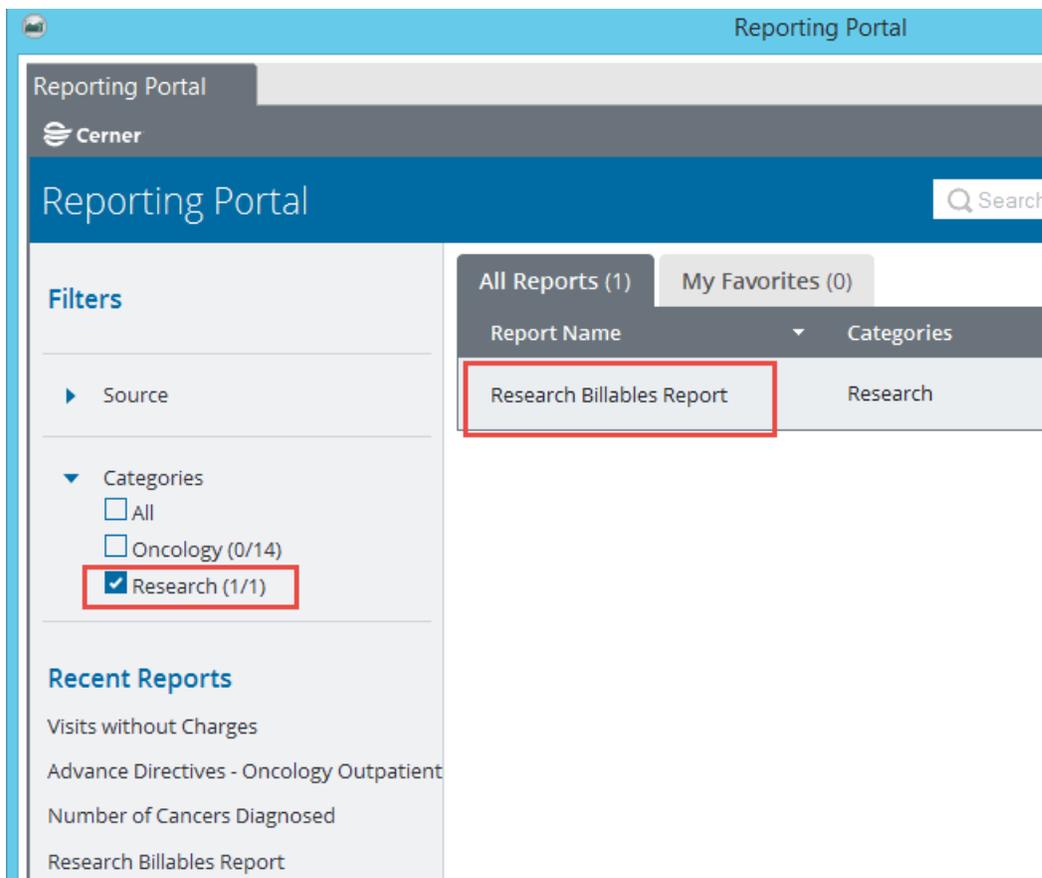
Activity 7.1: Accessing the Research Billing Report

This activity cannot be completed in the Train Domain at this time. Please ask your instructor to help you sign into another Cerner domain to complete this activity. **Instructor:** sign into the P0783 domain and use the login ONTEST.ONAMBRN1.

- 1 From PowerChart, locate and click the **Discern Reporting Portal** from the toolbar. Please be patient, this will take a few extra seconds to load.



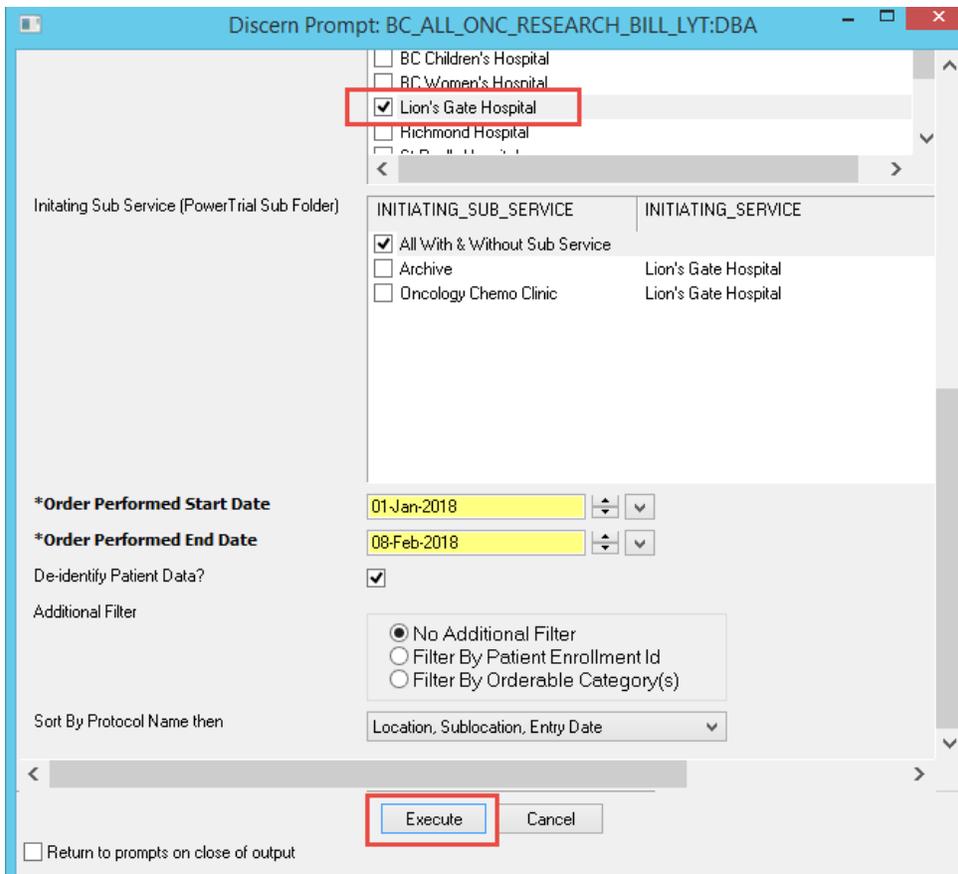
- 2 The **Reporting Portal** window appears. Click on **Categories** and select **Research**. The Research Billables Report will become available in the All Reports list.



- 3
 - 1. Click on the **Research Billables Report**
 - 2. Click **Run Report**



- 4 The **Discern Prompt : BC_ALL_ONC-RESEARCH_BILL_LYT:DBA** screen appears. Scroll down and review the displayed information. Click the check box next to **Lion's Gate Hospital** under the **Initiating Service (Power Trial Folder)** and then click **Execute**. Please only run reports for your studies and your clinics.



5 Below is an example of the **Research Billables Report**:

- The report can be saved in Excel format so that you can add extra columns in order to add prices for billing the Sponsor. You will need to save it to your network drive (you will not be able to save it to your desktop).
- This report can be de-identified for ease of sending to Sponsors

Research Billables Report							
Submitted By:	TestON, OncologyAmbulatory-Nur			Date Range:	01-JAN-2018 to 08-FE		
Submitted On:	08-FEB-2018			Deidentified:	Yes		
Report Mode:	Billing Cycle			Filtered By:	No Filter Applied		
Search By:	Initiating Service			Initiating Sub Service(s):	All		
Initiating Service(s):	Lion's Gate Hospital						
Protocol Name: TEST ONC SM MK3475-252 Keynote Study Account Name: Test Research Account; 123153							
Protocol Status	Primary Investigator			Site #	Location		Sub-Location
Open to Accrual	PLISVFR, Raisa, MD			678	Lion's Gate Hospital		
Enrollment ID	Encounter Type	Order Name	Order Type	Complete Date	Entry Date	Ordered Location	Power
006	Outpatient	CT Chest Abdo Pelvis w/ Contrast	Radiology	01-FEB-2018 12:00	01-FEB-2018 10:47	LGH Cardiac Lab	Resea
006	Outpatient	NM Liver and Spleen Sulfur Colloid	Radiology	01-FEB-2018 12:24	01-FEB-2018 10:47	LGH Cardiac Lab	Resea

 **Key Learning Points**

- The Research Billing Report can be run through the Discern Reporting Portal. This report can be de-identified.
- The report can be saved to your network drive.

■ PATIENT SCENARIO 8 – Accessing Standard Reports in POM and PPM

Learning Objectives

At the end of this Scenario, you will be able to:

- Access a standard report in POM and PPM
- View and print reports from both POM and PPM

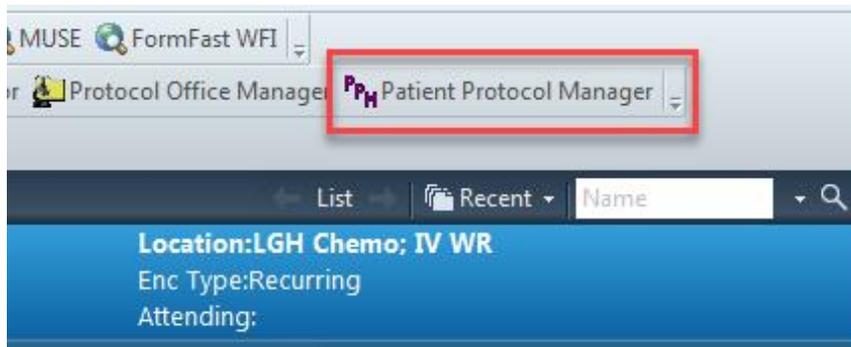
BACKGROUND

The purpose of accessing the Standard Report is to track your Research Team's:

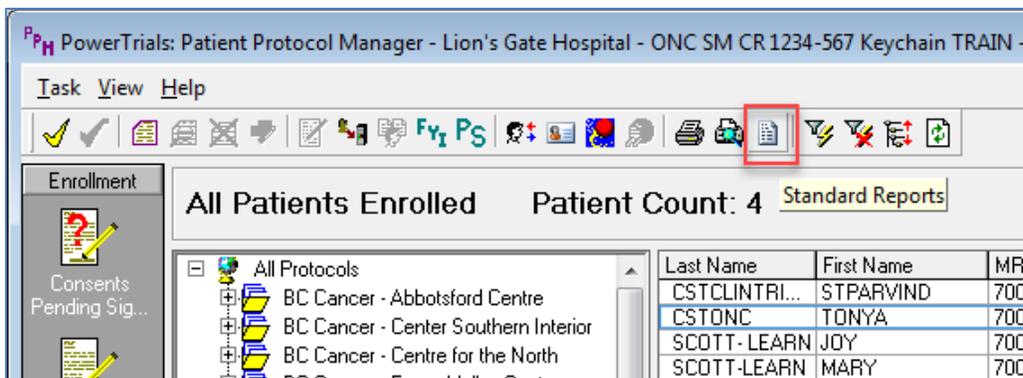
- Protocol milestones
- Patient numbers per site or protocol

Activity 8.1 – Accessing a Report in POM and PPM

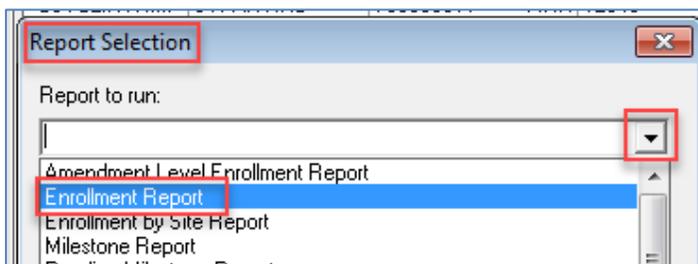
- 1 Navigate back to PPM, typically from the patient's chart from the toolbar.



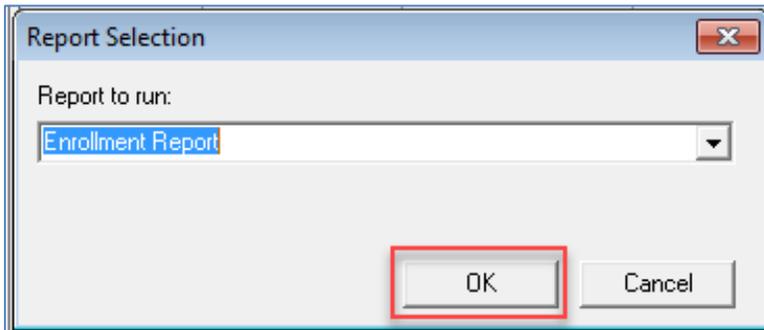
- 2 Click the **Standard Reports**  icon from the menu.



- 3 The **Report Selection** pop-up screen appears. Select the **Enrollment Report** from the drop-down  key.

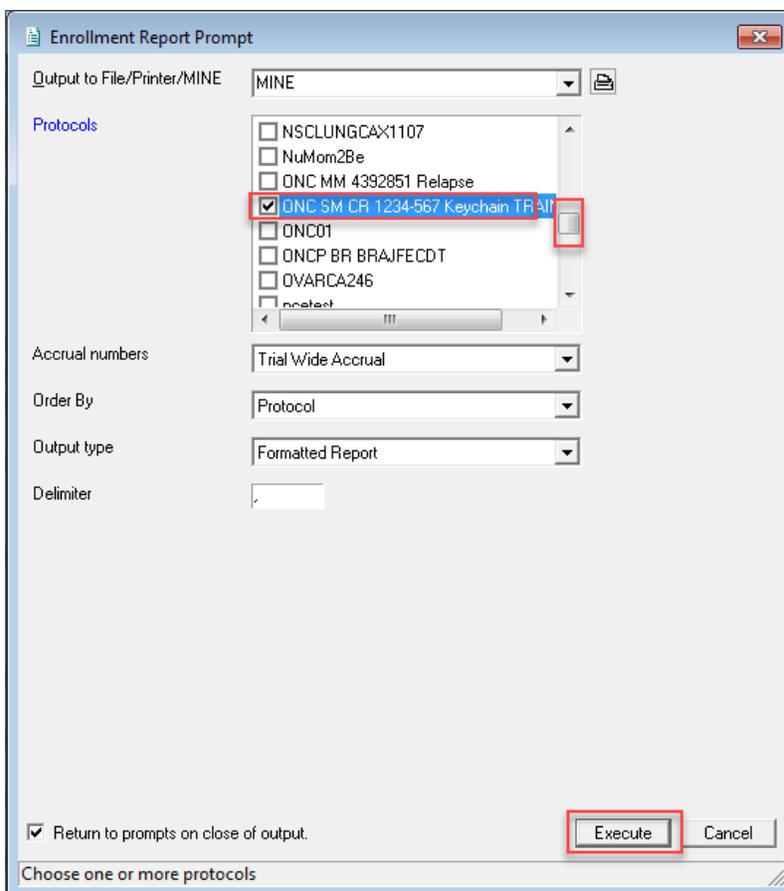


4 Click **OK**

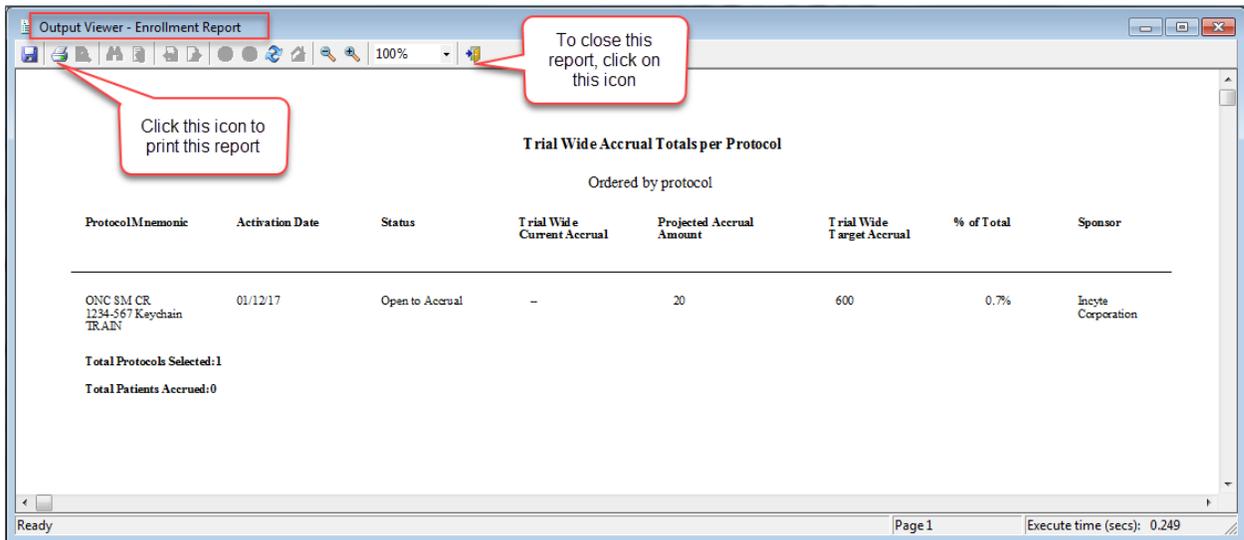


5 The **Enrollment Report Prompt** pop-up screen appears. Scroll down and click on the checkbox next to the **ONC SM CR 1234-567 Keychain TRAIN** under **Protocols**.

Then, click **Execute**

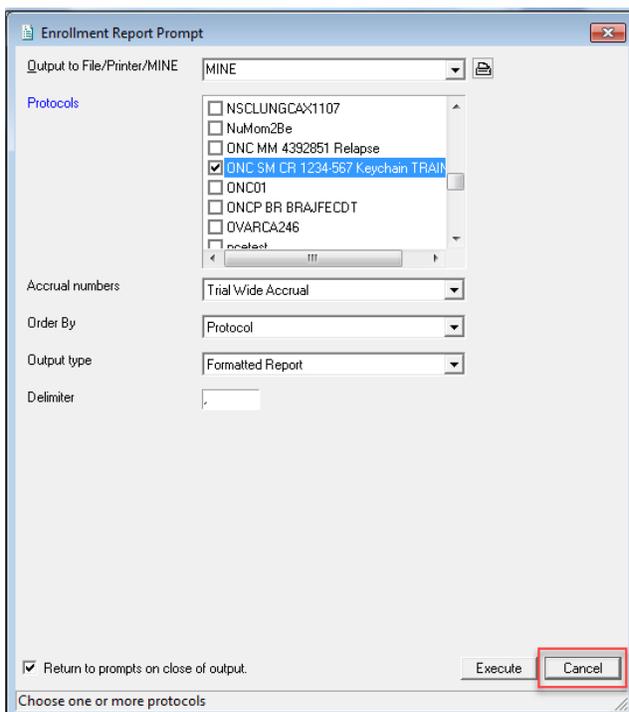


6 Below is an example of the **Enrollment Report**. To close this report, click the **Close**  icon.

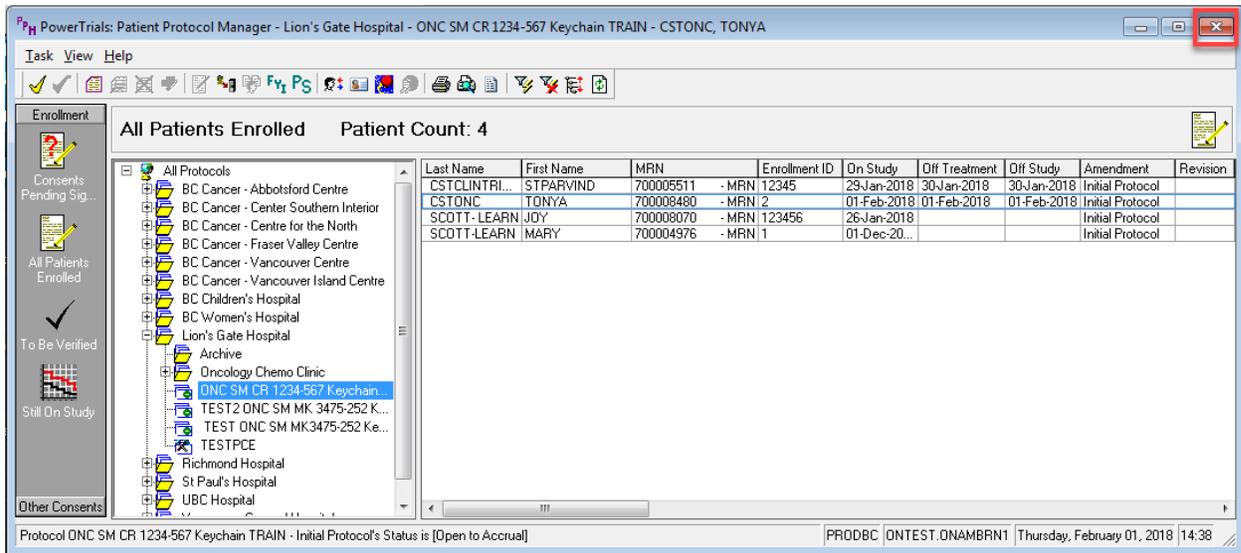


Note: For this training session, you will not print this report.

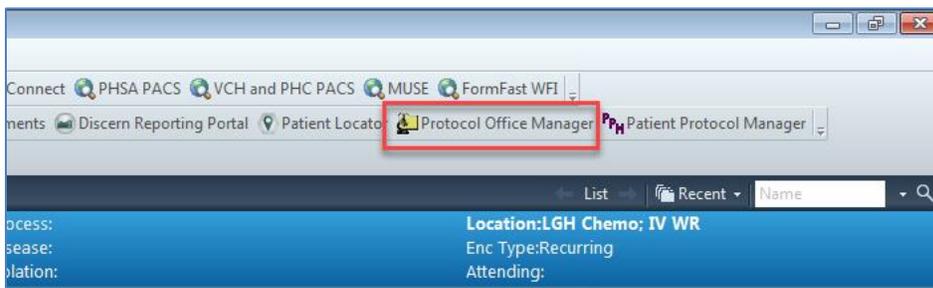
7 Click the **Cancel** button to close the **Enrollment Report Prompt**. Then, click **Cancel** on the **Report Selection**.



8 To exit the PPM application, click on the **Close** icon.



9 For practice, repeat the same steps for **POM** in accessing the Standard Report.



Key Learning Points

- The reports in POM will give you stats based on milestones per protocol
- The reports in PPM will give you stats based on patients per protocol

End Book One

You are ready for your Key Learning Review. Please contact your instructor for your Key Learning Review.