SELF-GUIDED PRACTICE WORKBOOK [N88] CST Transformational Learning

WORKBOOK TITLE:

Clinical Research (Nurses and Coordinators)



Last update: February 13, 2018 (v2)

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	 Learning Domain



SELF-GUIDED PRACTICE WORKBOOK

Duration	8 hours
Before getting started	 Sign the attendance roster (this will ensure you get paid to attend the session) Put your cell phones on silent mode
Session Expectations	 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	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.



Activity 1.1 – Ambulatory Organizer

2 <u>Day View</u> displays today's appointments and appointment gaps with selected resources, location, duration, patient information, appointment details, status of appointment and any additional notes.

	Ambulatory Organizer						[0] Full screen 🛛 👼 Pri	int 🛛 🤌 0 minutes ago
Γ	🗚 🗎 🖷 🆿 🔍 🔍 100%	- 😋 🛯 🗳						
	Ambulatory Organizer							
	Doubles (D)							
	Day view (5) Calendar	Open Items (2)						
	 November 7, 2017 	Patients for	r: LGH Chemo Chair 01 ; LGH Chemo Chair 02 ; LGH Chemo Chair 0	3 ; LGH Chemo Chair 04 ; LGH Chemo Chair 05 ; LGH Chemo Streb	her 1 *			
	Tora A	Duration	Detect	Dank	Online	linker		۲
Ш	R-00 AM		CSLITT ISIA		Confirmed	Troop -		
	LGH Chemo Chair 01	1 hr	71 Years, Female	Onc Chemo Infusion	LGH Chemo	G4		
	8:00 AM	1 hr	CST-TTT, RUTH	Onc Chemo Infusion	Confirmed	Chief Complaint: breast cancer		
Ш	LGH Chemo Chair 02		71 Years, Female		LGH Chemo			
	8:30 AM LGH Chemo Chair 03	1 hr	CST-TTT, GABRIELLA 71 Years Female	Onc Chemo Infusion	Confirmed LGH Chamo	4		
Ш			71 Teels, Penare		Can Chello			
	8:45 AM LGH Chemo Chair 04	35 mins	70 Years, Male	Onc Chemo Infusion	LGH Chemo	4		
	8:45 AM LGH Chemo Chair 05	35 mins	CST-TTT, ARTTU 76 Years Male	Onc Chemo Infusion	Confirmed	4		

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 <u>Calendar View</u> displays a resource's schedule for a day or a week. Click the <u>Day</u> tab to view multiple resources side by side. Click the <u>Week</u> tab to view a single resource's schedule.

Ambulatory Org	ganizer												
Day View	Calendar	Open Items (3)											
Day Week	Novemb	ber 8, 2017	Patients for	r: LGH Chemo Chair	01 ; LGH Chemo Chair	02 ; LGH Chemo Chair	03 ; LGH Chem	to Chair 04 ; LGH Chemo Chair	05 ; 🗰 LGH Chemo Med Onc Pro	viders ; LGH Chemo Stretcher 1 ~			
Avanessian,	Bains, Punee	LGH Chemo	LGH Chemo	LGH Chemo	LGH Chemo	LGH Chemo L	GH Chemo	Smiljanic, Sa					
2.00	Sun 11/5		Mon	11/6		Tue 11/7		Wed 11/8	Thu	11/9	Fri 11/10	Sat 11/11	
2 811													
3 am		Ambulat	lory Oppanizer										
4 am					_								
5 am		Cary 1	New Calendar	Open Items ()	0					-			
6 am		Day	Week 4 N	ovember 7, 2017	Puberts 1	or: LGH Chemo Chair 01 ; I	LGH Chemo Cha	r 02 ; LGH Oleno Olar 03 ; LGH I	Cheno Char (4 ; LGH Cheno Char (IS ; WFLGH Chemo Med Onc Provider	s ; LGH Cheno Stietcher 1 *		
7 am									November 7, 2017				
8 am		2 am	Avanessian, Ardash	NS MD	Bains, Puneet MD	LGH Cheno O	Nar 01	LGH Chemo Chair 02	LGH Chemo Char 13	LGH Chemo Chair 04	LGH Chemo Chair 05	LGH Chemo Stretcher 1	Smiljanic, Sasha MD
9 am		3 am											
0 am		4 am											
11 am		5 am											
.2 pm		6 am											
		7 am											
		8 am				CST-TTT, EAA Onc Owne Inflation		CST-TTT, BUTH Onc Cheme Inflation	UP Owne	104 Owne	LDI Dere	LDI Chena	
		9 am				LOH Overre		Confirmant LOH Champ	One Chemo Inflation Conformation	CST-TTT, SUR Drs: Chanse Inflation Confermal	CST-TTT, AKTTU Disc Overne Inflation Conference		LOH Med Onc
		10 am							-	LBI Owno	LOH Oveno		
		11 am											
		12 pm											

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

5



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).

<u>Open Items View</u> 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).

Ambulatory Organizer										
Day View Calendar	Open Items (3)									
Patients for: LGH Chemo Chair 01 ; LGH	H Chemo Chair 02 ; LGH Chemo Chair 03 ; LGH Chemo Chair 04 ; LGH (Chemo Chair 05 ; LGH Chemo Stretcher 1 👻								
LGH Chemo (2) LGH Chemo.	GH Chemo (2) LGH Chemo (0) LGH Chemo (0) LGH Chemo (1) LGH Chemo (0)									
From: October 25, 2017 View 7 More D	n: October 25, 2012 View 7 More Days									
Appointment	Patient	Details	Notes	Outstanding Actions						
⊿ More Than 2 Days Ago (2)										
02 November, 2017 2:00 PM	CSTPRODONC, OSCARTESTONE 46 Years, Male	Onc Chemo Infusion		Note Not Started ✓ Task List Complete Visit Summary Not Started						
27 October, 2017 10:00 AM 45 Years, Male Onc Chemo Infusion										
From: October 25, 2012 View 7 More D. Appointment 4 4 More Than 2 Days Ago (2) 02.November, 2017 2:00 PM 10:00 AM 27	Patent CSTPRODONC, OSCARTESTONE 46 Years, Male CSTTHREEFOUR, SITTWODAN 46 Years, Male	Details Onc Chemo Infusion Onc Chemo Infusion	Rotes	Outstanding Actions Note Not Started ✓ Task List Comple Visit Surmary N Note Not Started ✓ Task List Comple Visit Surmary N						

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

Click on Tracking Shell within the organizer toolbar.

P Po	werCha	art Orga	nizer for Te	estON, O	ncology	Ambulatory-Nurse	1									
Task	Edit	View	Patient	Chart	Links	Patient Actions	Provider	List	Help							
: ## A	mbulat	ory Org	anizer 🖃	Message	Centre	CareCompass	Clinica	l Lead	er Organizer	🔆 Patient List	🚨 Multi-Patient Task Li	t Tracking	Shell	😫 Staff Assignment	tear	ningLIVE $ _{=}$
: 📲 E	kit 🎦 A	AdHoc I	IIII Medica	ation Adr	ninistrat	ion 🔒 PM Conve	rsation 👻	Dep	art 🕞 Com	municate 👻 🗎	Medical Record Request	🕂 Add 👻	🛱 Sch	eduling Appointmer	nt Book	🔁 Docume
	atient H	lealth Ed	ducation N	laterials	🕄 SHO	P Guidelines and I)STs 🔃 Up	ToDat	te 🛫							

2 The Tracking Shell displays.

1

3

Trac	king Shell													
LGH	Chemotherapy	y Clinic LGH Chemoth	herapy Clinic Check Out											
Pati	ent: CSTONC,	, TONYA 🔹 Filt	er: <none> •</none>											
2	🔆 i 👟 😿 i	🏟 🐓												
	Location	Modality	Name	Date of Birth	Isolation	Allergies	Arrival Mode	RN	To Note	To Do	Comments	Lat	LOS	
	IV WR		CSTPRODMED, TEST-JULIET	30-Oct-1984		0							19:6:	20
	IV WR		CSTPRODMED, TEST-ECHO	11-Sep-1986		۲							19:6:	:14
	IV WR	Chemotherapy	CSTPRODMED, PHARM-ONE	29-Sep-1938		۰			6				98:7:	:38
	IV WR		CSTPRODHIM, STESTSEVEN T	201-Jan-2000		ai						4/3	104:9	9:05
	Exam 02		CSTONCONE, ONE	24-Oct-1975		a			68				99:9:	:54
	IV WR		CSTONCOLOGY, PETER	20-Dec-1977		Q							43:3:	:29
	IV WR		CSTONCFOUR, FOUR	27-Oct-1990		۵							97:3:	:13
	IV WR		CSTONC, VIAN	27-Dec-1988		۵							63:9:	:07
	Chair 15		CSTONC, TUESDAY	27-Aug-1988		۰		RNAm				4/0	133:6	6:13
	IV WR		CSTONC, TONYA	29-Jan-1985		۵				۲			63:9:	:11
	0.000		OOTONO OTWONTUDEE	10.4 0000		~		1.1	10 h	-			400.4	0.40

- 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.

Trac	scking Shell												
LGH	GH Chemotherapy Clinic LGH Chemotherapy Clinic Check Out												
Pati	ent: CSTPRODOM	NC, STEPHA 🔹 Filte	er: <none> •</none>										
a	o 🔹 🗹 🖆	ş 🐓											
	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		0	Air Ambulance C)	Sec. 1 868		waiting on lab results	5/0	392:22:5
	Chair 01		PITTHIRTYFOURLEE, JORDAN	04-May-1957		0		OT	8 8		patient on 4E porter bringing down at 0930, labs done on the unit		62:19:22
	Chair 02		CSTPRODONC, JUHIPHARMAC	01-Jan-1980		Q		amb3		۲		2/0	71:21:19
	Chair 03		CSTPRODONC, KEVINPHARMA	01-Jan-1980		•		Resea	i 🗟 🖁 🖁	۲	Testing comments		71:21:15
	Chair 04												
	Chair 05		CSTCLINTRIALS, STORANGE	22-Aug-1985		Q		Nurse	4			10/0	163:23:1
	Chair 05		CSTPRODONC, RECURRINGON	31-Aug-1985		Q		Nurse	Å .				154:20:0
	Chair 06	Dual Modality	CSTPRODREG, RECURTESTING	10-May-1990		6			69				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.

lcon	Description
	Blood Product Ordered
<u></u>	Clinical Trial/Study
25	Interpreter Required
R _k	Outpatient Rx Ready
	Outpatient Rx Reminder
5 % 9 91 9	Porter Called
	Procedural Sedation
*	Provider Exam Needed
1	Treatment in Progress
X	Treatment on Hold
<u>}</u>	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.

Track	racking Shell													
LGHC	LGH Chemotherapy Clinic LGH Chemotherapy Clinic Check Out													
Patie	Patient: ONCOLOGY-NURSEA, G 🕶 Filter: <none> 🔹</none>													
6	🎯 i 👒 😿 i 🖄 🤅	⋧												
	Location A	Modality	Namo	Data of Birth	Isolation	Allergies	Arrival Mode	DN	To Note	To Do				
	Exam 02	wodanty	Indifie	Date of Difti	ISUIALIUN	Allergies	Amvar would	PUN	TO NOLE	10 00				
	Exam 03													
	IV WR		Validate, Pharm-Oncology	1971-Jan-31		۲				_				
	IV WR		ONCOLOGY-NURSEA, GRETCHE	1969-Jan-31		Q								
	IV WR		ONCOLOGY-NURSEA, MEGHAN	1969-Jan-31		Q				-				

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

Events < CSTPRODREG, RE	CURRINGFORTY >					×
CSTPRODREG, REC	DOB:10-Ma	MRN:70000	Code Status:	Process:	Location:L	GH Chemo; C
	Age:27 years	Enc:7000000		Disease:	Enc Type:R	ecurring
Allergies: Allergies No	t Gender:Male	PHN:987656	5Dosing Wt:	Isolation:	Attending:	
Current Modify Reduct Order Clinical Trial/Study Interpret Trial/Study Netspret Trial/Study Nets Ready Outpt RX Ready Outpt RX Ready Outpt RX Ready Outpt RX Reminder Porter Called Procedural Sedation	Provider Exam Ready for Tra Treatment in P Treatment on I Volunteer Nee	Needed trment rogres Hold ded			ALL EVENT TYPES ADT Billing Communication Depart Action Decumentation Events GBS General	Lab Nursing Orders Physician Registration Tech To Do Visitor Informa Xray
▼ Request ▼ Start	Complete	Туре	Status	Automated	Order Status	Þ
01-Dec-2017 19:42-13	juinea mazsody		Hequest			Close



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

Modality	Name	Date of Birth	Isolation	Allergies	Arrival Mode	RN	To Note
Chemotherapy	ÇSTPRODONC, STEPHANIE	10-Jan-2005	, i	Q	Air Ambulance O	RNAmb	\$\$ <mark>\$}Ω!</mark> **\$\$
Dual Modality	CSTPRODREG, RECURTESTING	10-May-1990		ai		RNAmb	2
Radiation	CSTPRODREG, RECURRINGFO	10-May-1990		a		RNAmb	S.
D. LAL LTD	OOTDOODONO OTDUNOMONE	05 1 1 4000	2	~		DALA I	

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 Interpreter Required Isolation . Meds Ready Outpt RX Ready Outpt RX Reminder Porter Called Procedural Sedation Provider Exam Needed	Ready for Tre Treatment in F Treatment on Volunteer Nee	atment Progres Hold eded			
🔽 Request 🛛 📝 Start	Complete			_	Automated
Time	Event	Тире	Status	4 User	
01-Dec-2017 15:55:26	Clinical Trial/Study	ToDo	Complete	▼ TestON, On	cologyAmbulat
			In Progress		
			Start		
			Complete		
			Uancel		

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

Trac	Tracking Shell									
LGH	LGH Chemotherapy Clinic LGH Chemotherapy Clinic Check Out									
Pati	Patient: CSTPRODREG, RECURRII • Filter: <none> •</none>									
6	🙆 i 👒 👿 i 🙆	۶								
	Modality	Name	Date of Birth	Isolation Alle	ergies	Arrival Mode	RN	To Note	To Do	
	Chemotherapy	CSTPRODONC, STEPHANIE	10-Jan-2005	Q		Air Ambulance O	RNAmb	S	۲	
	Dual Modality	CSTPRODREG, RECURTESTING	10-May-1990	ai i			RNAmb	8		
	Radiation	CSTPRODREG, RECURRINGFO	10-May-1990	<u></u>			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, STWQMTHREE	12-Apr-2000	Q	Resea	۱		
Chair 08	Chemotherapy	CSTPRODONC, WORKINGGROU	09-Aug-1973	Q	@ \$ \$			
Chair 08	Radiation	CSTPRODREG, RECURRINGFOR	10-May-1990	ei.	RNAm		Patient to be considered by R-nurse at 1030	
Chair 09		CSTPRODREG, TESTRECURAG	10-May-1990	ei.	68			
Chair 10		CSTPRODREG. RECURTHREE	10-Mav-1990	q	*			

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).

Tra	cking Shell						
LGH	Chemotherapy (Clinic LGH Chemoth	nerapy Clinic Check Out				
Pa	tient: CSTPRODO	ONC, STEPHA 👻 Filt	er: <none></none>				
ß	🖉 i 👟 😿 i 🖉	ý 🐓					
	Location	Modality	Name	Date of Birth	Isolation	Allergies	S Arriv
	Chair 01	Chemotherap 1	CSTPRODONC, STEPHA	10-1-n-2005		0	Air A
	Chair 01		PITTHIRTYFOURLEE, J	2 Open Patient Chart	🔁 Ambulatory Sur	mmary	
	Chair 02		CSTPRODONC, JUHIPH	Add Order	Oncology		
	Chair 03		CSTPRODONC, KEVINF	Add order	- Orders		
	Chair 04			Discharge Process	Single Patient T	ask List	
	Chair 05		CSTCLINTRIALS, STOR	Spanshot	MAR		
	Chair 05		CSTPRODONC, RECUR	moomorrag 1905			
	Chair 06	Dual Modality	CSTPRODREG, RECURT	ESTING 10-May-1990	MAR Summary		
	Chair 07				Interactive View	and I <u>O</u>	

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.

CSTPRODONC, STEPHANIE					List
CSTPRODONC, STEPHANIE	DOB:10-Jan-2005	MRN:700001680			Location:LGH Chemo
	Age:13 years	Enc:700000002499		Disease:Exposure to Chicken Pox	Enc Type:Recurring
Allergies: Adhesive Bandage	Gender:Female	PHN:9878259161	Dosing Wt:65 kg	Isolation:Contact	Attending:
Menu P	🖌 🔹 🔹 🔒 Ambulatory Summary				[□] Full screen

Activity 1.3 Accessing a Patient's Chart



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.

CSTEICIA, ZOLA 🛛 🛛			← List → / The Recent ▼ Name - ♥
CSTEICIA, ZOLA	DOB:01-Jan-1960 MRN:700006145 Code State	is: Process: Disease	Location:LGH Chemo; IV WR
Allergies: No Known Medication Allerg	s Gender:Female PHN:9876735014 Dosing Wi	:60 kg Isolation:	Attending:
Menu	🕂 < 🔹 🛧 Ambulatory Summary		🗇 Full screen 🛛 Print 🌏 0 minutes ago
Ambulatory Summary	A I I I I I I I I I I I I I I I I I I I		
Oncology	Summary X3 Demographics X3	Transfusion Medicine X2 Future Orders X2 Hando	
Orders 🕂 Add			
Single Patient Task List	Chemotherapy Review (4)	Labs =• 🔊	New Order Entry 🐥 📃 = 👁 🚖
MAR	⊿ Current (3)	All Visits 🔻	Ambulatory (Meds as Rx) 🗸
Interactive View and I&O	Name Start	No results found	
Results Review	CONCP BR BRAVA7 15/11/2017	NO TESUIS TOUTO	Q Search New Order
Documentation + Add	Cycle 1 - ONCP BR BRAVA/ 15/11/2017	🔍 Vital Signs 💠 🚽 🚍 🗐	Mine
Medication Request	Cycle 1 - ONCP GI GIFFIRB *Est. 28/09/2017	All Visits	Favorites
Histories	CONC BR BRAVCAP 06/09/2017	Latest Previous	Ambulatory In-Office Favorites (Misc 1)
Allergies Add	Cycle 2 - ONCP GI GIFFIRB *Est. 27/09/2017	within within	My Plan Eavorites
Alicigits	A Historical (1) - 16/11/2016 to Current	All and a second a	- Hy Hull Huvolices
	Cvcle 1 - ONCP GI GIFFIRB - Cvcle 1 02/09/2017 07/09/2017		Clinical Research (0) =• •
CareConnect		🛛 😣 Pathology (0) 🛛 🖛 🔊	
Clinical Research	Problem List =• 🦉	All Visits	Documents (0) 💠 📃 📼 🕤
Diagnoses and Problems	All Visits		All Moite
Form Browser	Classification: All	Error retrieving results	
Growth Chart		Imaging (0)	No results found
Immunizations	Priority Problem		Measurements and Weights (2)
Lines/Tubes/Drains Summary	This Visit (0)	Lines, Tubes, and Drains (0) $\equiv \bullet \odot$	
MAR Summary			Today Previous Change
	· · · · · · · · · · · · · · · · · · ·	I Patient Assessment (III) = • •	tony Plevous Change

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.



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

	VIP	Deceased A	Alerts BC PHN	MBN	Name		DOB	Ag	ge (Gender	Address	Address (2)	City	Postal/Zip Code	Home P	ł
	2		10760000	723 760000723	ONCOLOGY	NURSEC, CARRIE	1951 J	an-20 07:46 66	SYears 1	emale	724 West Broad	way	Vancouver	V6R 2L3	(604)123	
	-															
	-			N												
				N												
÷ -	-															
	•														•	
	Faci	ity	Encounter #	Visit #	Enc Type	Med Service		Unit/Clinic	Room	Bed	Est Arrival Date	Reg Date	Disch Date	Attending Prov	ider	
	- ∮ L	GH Lions Gate	76000001007	760000010075	Inpatient	General Internal Mer	dicine	LGH 7W	719	01		04-Jan-2018 12:0	5	TestCST, Gen	eralMedicir	
	- Million	GH Lions Gate	76000000072	760000000723	Recurring	Medical Oncology		LGH Chemo Hol	d			02-Jan-2018 7:46		Train, Oncolog	istHematol	
	-															
et	-															
	-															



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.**

Published Desktop - ProdBC - Citrix Receiver			-
P SCOTT- LEARN, JOY - 700008070 Opened by TestCST, Oncolo	gyAmbulatory-Nurse5 ON		
Task Edit View Patient Chart Links Navigation H	lelp		
🗄 🎬 Ambulatory Organizer 🖃 Message Centre 📲 CareCompas	s 🌃 Clinical Leader Organizer 🎍 Patie	ent List 🚨 Multi-Patient Task List 🛛 Tracking Sh	nell 🚊 Staff Assignment
🗄 🔀 Tear Off 📲 Exit 🎬 AdHoc 💵 Medication Administration	🔒 PM Conversation 🛛 💦 Depart 🕞	Communicate 👻 🗎 Medical Record Request	🕂 Add 👻 🖺 Scheduling Appointme
🕴 🔇 Patient Health Education Materials 🔇 Policies and Guidelin	Cancel Discharge		
SCOTT- LEARN, JOY 🛛	Discharge Encounter		
SCOTT- LEARN, JOY DOB:14 Aqe:65	Modify Discharge Print Specimen Labels	Code Status:	Process: Disease:
Allergies: No Known Allergies Gender:	Process Alert	Dosing Wt:65 kg	Isolation:
Menu 🥂 🖌 🛉 Am	Register Phone Message		
Ambulatory Summary	Update Patient Information		
Oncology Summary	View Person	S Transfusion Medicine	E Future Orders

2. Enter the Facility Name

🚯 Organization 📃 🔀
Please select the facility and/or client where you want to register the new encounter.
Facility Name Facility Alias
Igh chemo
Facility:
OK Cancel



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

🦥 Register Phone Message				
Medical Record Number: 700008070	Encounter Number:			
Last Name: SCOTT-LEARN Age: 65Y	First Name: JOY Home Phone Number: [(555)555-5555	Middle Name:	Gender: Female	Date of Birth: 14-Nov-1952 💌 👻
Facility: LGH Chemo	Building: V LGH Chemo	Unit/Clinic:	Encounter Type: Phone Message]
Registration Date: 30-Nov-2017	Registration Time:	Register Phone Msg User Name:		
				Complete Cancel
Ready			PRODBC ONCSTTEST.A	MBRN5 30-Nov-2017 12:35

Click OK

Register Phone Message	×
The following LGH Chemotherapy Clinic aliases have been assigned for SCC LEARN, JOY: Encounter Number: 7000000015829)TT-
Visit Id: 700000015829	
	ОК

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**.

SCOTT- LEARN, JOY 🛛 🛛					List 🦷 Rec
SCOTT- LEARN, JOY	DOB:14-Nov-1952	MRN:700008070	Code Status:	Process:	Location:LGH Chem
	Age:65 years	Enc:700000013505		Disease:	Enc Type:Recurring
Allergies: No Known Allergies	Gender:Female	PHN:9876482783	Dosing Wt:65 kg	Isolation:	Attending:

6

7



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

P Custom Informatio	on: SCOTT- LEARN, JOY							
Encounter Type	Location	Admit Date	Discharge Date	Encounter #				
Phone Message	LGH Chemo	30-Nov-2017 12:33 PST		700000015829				
Recurring	LGH Chemo IV WR	14-Nov-2017 14:40 PST		700000013505				
Outpatient	LGH Chemo IV WR	14-Nov-2017 13:36 PST	14-Nov-2017 23:59 PST	700000013494				
•	4 M							
	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:	700000013505					
Nurse Unit:	LGH Chemo							
Room:	IV WR							

Visit List	23
This will change your patient's chart to t Do you want to continue?	the selected encounter.
	Yes No

You will now be in the patient's chart in the Phone Message encounter.





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.

🕸 New Message	
Task Edit	
📍 High 🐧 Notify 📓 Message Journal 🦾 Portal Options	Taunch Orders
Patient: SCOTT- LEARN, JOY Caller: SCOTT- LEARN, JOY Caller #: H (555)555-5555	
To: CC: Provider: Disable f	Include me
Subject: General Message Save to Chart As: Phone Message/Call	•
Attachments	
Browse Documents Other Attachments	
Message	
Arial • 10 • ③ ● ● ▲ ☆ B U / S ■ ■ ▲ ● ●	
Actions 3 Patient Needs Appointment Needs Lab Before Refill Please Call Patient with Results Message Left for Patient to Return Call Agree with Message See Note In Chart Actions 4 Remind on: Due on: 5 Due on: 7 Send	V V V Cancel

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.

CSTCLINTRIALS, LGHBLUE					CSTCLINTRIALS, STCI
Message Centre					[0],Fu
Inbox Summary	ņ	Messages)	<		
Inbox Proxies Pools	-	Commun	icate 🔹 👸 Open 🖧 Reply 🆓 Reply All 🙈 Fo	orward 🏝 Delete 🏼 Message Journa	🛿 🖕 Select Patient 🗮 Select All 🚓 Patient Match
Discharge La 100 Days		Priority	Patient Name	From	Subject
Display: Last 90 Days		1	CSTCLINTRIALS; STCINDY	SYSTEM, SYSTEM Cemer	Research Patient Presented to ED
= Priority Items (0)	^	1	CSTCLINTRIALS, STPARVIND	SYSTEM, SYSTEM Cerner	Research Patient Has Been Admitted as an Inpatient
 Messages (0/3) General Messages (0/3) 		1	CSTONCTHREE, THREE	SYSTEM, SYSTEM Cerner	Research Patient Has Been Admitted as an Inpatient

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

STCLINTRIALS, LGHBLUE		STCUN
Message Centre		
Inbox Summary	Messages × General Messages: CSTCLINTRIALS, STCINDY ×	
Inbox Proxies Pools	🔒 Reply 🗟 Reply All 🏨 Forward 🎽 Delete 🎯 Print 😭 🐺 🍓 Mark Unread 🛛 Inbox View Summary View 👸 Launch Orders	
Display: Last 90 Days	CSTCLINTRIALS, STCIN, DOB:10-Aug-1990 MRN:700005835 Code Status: Pr Age:27 years Enc:7000000200830 D	ocess isease
- Priority Items (0)	Allergies: No Known Allerg Gender:Female PHN:9676744156 Dosing Wt:50 kg Is	olation
Messages (0/3)	From: SYSTEM, SYSTEM Cerner Caller:	
General Messages (0/3)	Sent: ? 05-Feb-2018 07:04:47 PST Action:	
- Inhov Hams (102)	Subject: Research Patient Presented to ED Due:	
C Books (1/1)	To: PLISVFR, Raisa, MD; TestCST, OncologyAmbulatory-Nurse306 ON; Ehrhardt, Payton; P Provider:	
Other (1/1)	Cc: Research Patient Presented to ED Document: Document: Phone Message/Co	di i
 Orders (94/94) Renewal Orders (2/2) Cosign Orders (92/92) 	<add text=""></add>	_
 Documents (6/10) Sign (6/7) Review (0/3) 	The person CSTCLINTRIALS, STCINDY is enrolled on protocol TEST ONC SM MK3475-252 Keynote, TEST 617 (AGENSYS AGS-16C3F-15-3 and has been admitted to the emergency department.	S)

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.

2



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

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.

CSTONC, TONYA - 700008480 Opened by TestON, O	incologyAmbulatory-Nurse1							
Task Edit View Patient Chart Links Navig	Task Edit View Patient Chart Links Navigation Help							
🗄 🌇 Ambulatory Organizer 🖃 Message Centre 🎬 Can	Manualitory Organizer i Message Centre 🐘 CareCompass 🐂 Clinical Leader Organizer 🍦 Patient List and Multi-Patient Task List Tracking Shell az Staff Assignment 🐘 Learning[UNE 🛄 CareConnect 🔃 PHSA PACS 🔃 VCH and PHC PACS 🖏 MUSE 🕲 FormFast WFI							
Tear Off 🚽 Exit 👹 AdHoc 🚥 Medication Admin	😰 Feer Off 🍕 Eait 👹 AdHio: 🗰 Medication Administration 🔮 PM Conversation + 😰 Depart 🛁 Communicate + 🔄 Medical Record Request + Add + 🏶 Scheduling Appointment Book 🖷 Documents 🔒 Discem Reporting Portal 💿 Patient Locato							
2 Ratient Health Education Materials 🖉 SHOP Guide	dines and DSTs 🔞 UpToDate 🛫							
CSTONC, TONYA 🔳					- List - Marrie + Q			
CSTONC, TONYA	DO8:29-Jan-1985	MRN:700008480	Code Status:	Process:	Location:LGH Chemo: IV WR			
		Enc:700000015776			Enc Type:Recurring			
Allergies: penicillin	Gender:Female	PHN:9876421761	Dosing Wt:60 kg	Isolation:	Attending:			

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

PowerTrials: Protocol Office Ma	Icon	Action
File Edit View Window Help	General	The General view for a protocol displays summary information about the protocol.
Prot	Eligibility Checklists	The Eligibility Checklists will not be used and therefore this folder will be empty.
General	Protocol Roles	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.
Protocol Roles	Documents	The Documents view for a protocol displays information about the documents associated with the protocol. The prohibited medications list will be here.
Documents	Milestones	The Milestones view for a protocol displays information about the milestones associated with a protocol.
	Revisions	The Revisions view for a protocol displays information about the revisions associated with a protocol.

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



4

3

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

CLINICAL+SYSTEMS TRANSFORMATION

TRANSFORMATIONAL

LEARNING



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.

1

2



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.

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

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

<u>File Edit View Windo</u>	ow <u>H</u> elp		
M 2 6 6 6 6	2 🔳 🎯 🧏 🗗 🕫 🕼 🗱 🖽 % 🤅	: 🎦 🌌 🗎 🛤	
Protocols/Amendments	Protocol / General		
General	🖃 🐓 All Protocols	Name	General Protocol Information
	🗄 🦳 BC Cancer - Abbotsford Centre	Title	A Phase 3 Randomized, Double-Blind, Placebo-Controlled Study of P in Combination With A or Placebo in Sub
	BC Cancer - Centre for the North	Primary Mnemonic	ONC SM CR 1234-567 Keychain TRAIN
	🕀 🗁 BC Cancer - Fraser Valley Centre	Protocol Aliases	Secondary Contact - Research Nurse: Tom Lee 604-567-1234 *ext12345
Eligibility Checklists	🕀 🗁 BC Cancer - Vancouver Centre		Primary Contact - PI: TestON, OncologistHematologist-Physician604-987-9876ext12345-¶Úv
	BC Cancer - Vancouver Island Centre		REB # - 12345
	BC Children's Hospital		Health Canada NOL # - 5678
Protocol Roles	BC Women's Hospital		Site # - 1234567
	BLL - Lentre for Southern Interior	Date of IRB Approval	
R		Date Activated	01-Dec-2017
Desumente	THE Oncology Chemo Clinic	Date IRB Approval Expires	
Documents	2 HE ONC SM CB 1234-567 Keychain TBA	Pate Closed	
	ET TEST2 UNC SM MK 34/5-252 Ke	Date Completed	
	E TEST ONC SM MK3475-252 Key	Status	Open to Accrual
Milestones	E 🛪 TESTPCE	Current Site Accrual	0
010	🕀 🗁 Richmond Hospital	Site's Targeted Accrual	6
- 2	🕀 🕞 St Paul's Hospital	Trial Wide Targeted Accrual	600
Bevisions	🕀 🗁 UBC Hospital	Principal Investigator	Test, Onc Physician - Oncologist/Hematologist, MD
1101101010	🗄 🚰 Vancouver General Hospital	Study Type	Therapeutic
		Phase	
		Program	Drug
		Participation Type	Interventional
		I reatment Modalities	
		Diseases to be I reated	
		Primary Sponsor	Incyte Corporation
		Secondary Sponsors	
		Initiating Service	
		Protocol Contacts	Grewal, Parvind - Creator/Start Up Coordinator
		Our and Data and Mature	Lest, Unc Physician - Uncologist/Hematologist, MD - Principal [Qualified] Investigator
		Cerner Research Network	INO

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).

Protocols/Amendments	Protocol / General		
General	🖃 🐓 All Protocols	Name	General Protocol Informa
	BC Cancer - Abbotsford Centre	Title	A Phase 3 Random Unresectable or Me
	🕸 🛱 BC Cancer - Centre for the North	Primary Mnemonic	ONC SM CR 1234-5
Eligibility Checklists	🕀 🚰 BC Cancer - Fraser Valley Centre	Protocol Aliases	Secondary Contact
	🕀 🗁 BC Cancer - Vancouver Centre		Primary Contact - PI
<u></u>	🕀 🗁 BC Cancer - Vancouver Island Centre		REB#-12345
Protocol Roles	🕀 🔁 BC Children's Hospital		Health Canada NOL
	EC Women's Hospital		Site # - 1234567
	E Con's Gate Hospital	Date of IRB Approval	
		Date Activated (4)	01-Dec-2017
Documents	ONC SM CP 1224 567 Kaushain TPAIN	Date IRB Approval Expires	
	TEST2 ONC SM CH 1234-367 Revonant HAIN	Date Closed	
	TEST ONC SM MK 3473-252 Keynole	Date Completed	
Milestones		Status (5)	Open to Accrual
67-67	Fichmond Hospital	Current Site Accrual	1
- <mark>5</mark>	🛱 🧭 St Paul's Hospital	Site's Targeted Accrual	6
-0	🗄 🚝 UBC Hospital	Trial Wide Targeted Accrual	600
Hevisions	🗄 🚝 Vancouver General Hospital	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 6	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.

		General Message	Plisvck, Rayford, MD
Documentation	Add	Onc. Medical Follow-Up Cli	02-Nov-2017 15:11:00 PDT
Medication Request		Oncology Outpatient Clinic	Plisvck, Rayford, MD
L listeries		Consent Clinical Trials/Rese	02-Nov-2017 14:50:29 PDT
Histories		 Consent Clinical Trials/Rese	



Key Learning Points

Faxing of the signed consent form is done though 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.

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.

CSTONC, TONYA - 700008480 Opened by TestON, O	IncologyAmbulatory-Nurse1				- 6 -
Task Edit View Patient Chart Links Navigu	ation Help				
🗄 🎬 Ambulatory Organizer 🖃 Message Centre 🎬 Carr	eCompass 脳 Clinical Leader Organize	er 🛉 Patient List 🚨 Multi-Patient	t Task List Tracking Shell 😂 Staff As	ssignment 🎬 LearningLIVE 🚽 🗑 CareConnect 👰 PHSA PACS 🥘 VCH and PI	HC PACS 🖏 MUSE 🔃 FormFast WFI 💡
🔀 Tear Off 📲 Exit 📲 AdHoc 🔳 Medication Admin	istration 🚨 PM Conversation 👻 🎎 D	epart 🔄 Communicate 🔹 🗃 Me	dical Record Request 🔸 Add 👻 🎁 S	Scheduling Appointment Book 🖹 Documents 🔒 Discem Reporting Portal 🦉 P	atient Locator 🛓 Protocol Office Manage 🍖 Phy Patient Protocol Manager 🛫
Q Patient Health Education Materials 🔞 SHOP Guide	elines and DSTs 📿 UpToDate				
CSTONC, TONYA					- List - 👫 Recent - Name - Q
CSTONC, TONYA	DO8:29-Jan-1985	MRN:700008480	Code Status:	Process:	Location:LGH Chemo; IV WR
	Age:33 years	Enc:700000015776			Enc Type:Recurring
Allergies: penicillin	Gender:Female	PHN:9876421761	Dosing Wt60 kg	Isolation:	Attending:

2 The PPM application window appears

1

PM PowerTrials: Patient Protocol Manager - Lion's Gate Hospital - ONC SM CR 1234-567 Keychain TRAIN	
Iask Yiew Help	
· _ ✔ ✔ @ @ @ ★ ♥ IZ %# 199 Fv PS \$* E ■ @ @ @ @ W \$¥ ¥ E @	
All Patients Enrolled Patient Count: 2	
Concret/ Processory System All Protocols Exceeded and the state of the Nath BC Cancer - Cancel Southen Interior BC Cancer - Vancouver Cante BC Chancer - Vancouver Canter BC Chancer BC Chancer - Vancouver Canter BC Chancer BC	A
Protocol DNC SM CR 1234-567 Keychain TRAIN - Initial Protocol's Status is [Open to Accrual]	C ONTEST.ONAMBRN1



3 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.



4 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** \blacksquare icon from the menu bar.



6 The Patient Search screen opens.

PPH PowerTrials: Patient Pro	otocol Manager - Lion's Gate Hospital -	ONC SM CR 1234-567 Keycl	rchain TRAIN	
<u>T</u> ask <u>V</u> iew <u>H</u> elp				
√ ✓ 🙆 🛱 🖉 🕈	📝 🌆 🦻 Fyr Ps 😒 🖬 🔳 🕬	i 🖨 🗟 🗈 🛛 🏹 🕅		
Enrollment All Pati	ients Enrolled Patient (Count: 2		
Consents Pending Sig. All Polients Shill On Study	Protocols BC Cancer - Abbotsford Centre BC Cancer - Center Southern Interior BC Cancer - Center Southern Interior BC Cancer - Vancouver Centre BC Cancer - Vancouver Centre Cancelogy Chemo Clinic - Cancelogy Chemo Clinic - Cancelogy Chemo Clinic - Cancelogy Chemo Clinic - Cancelogy Chemo Clinic - TEST2 ONC SM K13475-252 Keynole - TE	Last Name First Name SCOTT-LEARN MARY SCOTT-LEARN MARY	LUNN Description (Content Internet	Cancel
PTOTOCOLUNE SM CH 1234-56	57 Neychain Timaini - Initial Protocol's Status	is jupen to Accrualj	PHODEC INTE:	I.UNAMBRINT Monda



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

CSTCLINTRIALS, STSTRAWBERRY CSTCLINTRIALS, STPARVIND CSTCLINTRIALS, STORANGE CSTCLINTRIALS, STCINDY	700005979 700005511	Female	16-Aug-1985	32 Years	
CSTCLINTRIALS, STPARVIND CSTCLINTRIALS, STORANGE CSTCLINTRIALS, STORANGE	700005511	Female			
CSTCLINTRIALS, STORANGE		1 cmdic	06Jan 1990	28 Years	
CSTCLINTRIALS STCINDY	700006099	Male	22-Aug-1985	32 Years	
Corocarrines, stendt	700005835	Female	10-Aug-1990	27 Years	
CSTCLINTRIALS, STBOB	700005470	Male	25Jul-1962	55 Years	
			Image: Section of the sectio	Image: sector	Image: second

10 The **New Enrollment** screen opens.

🕄 New Enrollment	×
Name: SCOTT-LEARN, MARY	Medical Record Numbers: 700004976 - MRN
Protocol:	,
Enrolling	
Enrolling institute	Enrolling Consent
* Stratum:	Cohort:
* Enrollment identifier	
	OK Cancel Apply

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.



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

Task Edit View Patient Chart Links Navigati	on Help
🗄 🎬 Ambulatory Organizer 🖃 Message Centre 📲 CareC	ompass 🎬 Clinical Leader Organizer 🎄 Patient List 🔉 Multi-Patient Task Lis
🗄 🔀 Tear Off 📲 Exit 🎬 AdHoc 💵 Medication Administ	ration 🚡 PM Conversation 🔹 💦 Depart 📲 Communicate 💌 🗎 Medical Rec
🗄 💐 Patient Health Education Materials 💐 SHOP Guidelin	es and DSTs 🔇 Up PM Conversation
CSTCLINTRIALS, STPARVIND	
CSTCLINTRIALS, STPARVIND	DOB:06-Jan-1990 MRN:700005511
Alleraies: Nuts	Age:28 years Enc:700000016492

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**.

🕞 Organization		x
Please select the aliases.	facility where you want to view person	
Facility Name	Facility Alias	
lgh		
Facility:		
	OK Cancel	

5 Select LGH Chemotherapy Clinic and then click OK

🕞 Organization 🛛 💌
Please select the facility where you want to view person aliases.
Facility Name Facility Alias
lgh
LGH Breath Program LGH Cardiac Home Care LGH Cardiology Lab
LGH Chemotherapy Clinic
Facility:
LGH Chemotherapy Clinic
OK Cancel

6



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

Medical Record Number:	Encounter Number:	Last Name:
760001093		UNCULUGY-NURSEA
First Name:	Middle Name:	Preferred Name:
GRETCHEN		
Previous Last Name:	Date of Birth:	Age:
Oncology-NurseA	31-Jan-1969	<u>∧</u> y 49Y
Gender:	BC PHN:	
Female ALERTS	v 0760001093	
Female ALERTS Process Alert:	▼ 0760001093	
Female ALERTS Process Alert:	✓ 0760001093	

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

🍜 Process Alert			
Medical Record Number: 700005511	Encounter Number:	Last Name: CSTCLINTRIALS	First Name: STPARVIND
- ALERTS		_	
Process Alert:	Scroll down	1	
From Available:		elected:	
Falls Risk Family Development Gender Sensitivity No Colling Lift On Research Study Palliative Hag	Move > E Select All		



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.

Process Alert		
Medical Record Number: 700005511	Encounter Number:	Last Name: CSTCLINTRIALS
- ALERTS		
Process Alert:		
From Available:		To Selected:
Falls Risk Family Development Gender Sensitivity No Ceiling Lift Palliative Flag Seizure Precautions	Move > Select All	On Research Study

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

CSTCLINTRIALS, STPARVIND				
CSTCLINTRIALS, STPARVIND	DOB:06-Jan-1990	MRN:700005511	Code Status:	Process:On Research Study
	Age:28 years	Enc:700000016492		Disease:
Allergies: Nuts	Gender:Female	PHN:9876752114	Dosing Wt:60 kg	Isolation:

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





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.





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.

Clinical Trial Oncology Nurs	e, Ne	ellie 🗵											+	List $\Rightarrow $	Recent	- Name	
linicalTrialOncologyNur	se, N	ellie	DOB:1989-Jan-26 Age:29 years	MRN:760001069 Enc:7600000001069	Coc	le Status:			Process:C Disease:	ytotoxic			Location Enc Type	:LGH Che :Outoatien	mo; IV F it	lold	
llergies: Nuts			Gender:Female	PHN:10760001069	Dos	ing Wt:60 kg			Isolation:				Attendin	g:Train, Ge	neralMe	dicine-Phy	sician7, MD
Menu 🏾	<	> - 14	Ambulatory Summ	ary										(c) Full :	screen		€ 6 minutes
Ambulatory Summary	- A		. 🔍 🔍 100% -														
Oncology		Summary	52	Demographics	5:2	Transfusion Medicine	5.2	Euture (Orders	5.2	Hand	loff Tool	52	+	(0
Orders 🕂 Add		,			55		55						D.G	т	l	-	<u> </u>
ingle Patient Task List		Chemothera	apy Review (0)		≡• ⊘	Labs				≡• (<u>ہ</u>	New Order Entry 🚦					≡• ∾
MAR		⊿ Current (0)				All Visits 🔻						Ambulatory (Meds as Rx)	Ŧ				
MAR Summary	N	lame			Start		Today		Den	ulaur.	- 1						
nteractive View and I&O	N e	No results					within		wi	thin		Q Search New Order					
lesults Review		⊿ Historical (0)) - 06/02/2017 to Current			Oncology Labs (3) Creatinine			60	145		Mine					
ocumentation 🔹 Add -	N	lame		Star	rt Stop				29 hrs	30 hrs		Favorites					
Adjustion Request		No results				Chloride			95	101		My Plan Favorites					
listorios		tound				MCV			29 hrs 88	30 hrs							
nistories		Problem Lis	t		=- 0				30 hrs			Clinical Research (1)					= .
Add 🕈 Add	12	All Vieite			- •							()					
						🛛 Vital Signs 🕂 🔻				≡• (•	0110 011 00 1001 000	On S	tudy	Status	Cor	tact
lareConnect		Classification	n: All			All Visits						UNC SM CK 1234-567 Keychain TRAIN	06/	02/2018	On Stud	y <u>Gi</u> Pa	ewai, rvind
linical Research		no.										regenant fround					

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

Clinical Research (1)			≣∙⊗
	On Study	Status	Contact
ONC SM CR 1234-567 Keychain TRAIN	06/02/2018	On Study	<u>Grewal,</u> <u>Parvind</u>





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.

		Clinical Research (3)			=
			On Study	Status	Contact
	≣∙⊗	ONC SM CR 1234-567 Keychain TRAIN	29/01/2018	On Study	<u>Grewal,</u> <u>Parvind</u>
Contact Information		TEST 617 (AGENEVS) AGS 1602E	11/01/2017	Off Study	Chrho 't
Contact Name	ROLE	Organization	Phone Nun	nber	
Grewal, Parvind	Creator/Start Up (Coordinator			
TestON, Oncologist/Hematologist- Physician, MD	Principal [Qualified Investigator	d]	(604)001	-0020	=
TestON, OncologyAmbulatory- Nurse1	Research/Clinical	Trials Nurse LGH Chemotherapy Clini	c		-
					Close 2



Click on the Clinical Research component header.

CSTCLINTRIALS, STPARVIND						it
CSTCLINTRIALS, STPARVIND	DOB:06-Jan-1990 Mi Age:28 years En	RN:700005511 Code S c:700000016492	tatus:	Process:On Research Study Disease:	Location:LGH Chemo Enc Type:Recurring	; IV WR
Allergies: Nuts	Gender:Female PH	N:9876752114 Dosing	Wt:60 kg	Isolation:	Attending:	
Menu 🤻	< 🗧 - 👘 Ambulatory Summary					🗇 Full screen 🛛 🗇 Print 🛛 🎝 50 minutes
Ambulatory Summary	A					
	Summary 23 Demograd	shics 52 Tran	nsfusion Medicine 22 Future Orders	23 Handoff Tool	22 +	
Orders 🕂 Add						
Single Patient Task List	Cycle 1 - ONCP GU GUAJPG option 1 - Cycle 1	31/10/2017	No results found		Q Search New Order	
	Cycle 1 - ONCP LY LYCHOP TESTING - Cycle 1	28/07/2017	Vital Signs 📥 🚽	≡• ◇	Mine	
MAR Summary	Mistorical (0) - 30/01/2017 to Current	Start Stop	All Visits		Favorites	
	No results found		No results found		Ambulatory In-Office Emoritor (Misc 1)	
Results Review					An Dan Councillan	
Documentation 🕂 Add	Problem List	=• ~	Pathology (0)	≡• ⊙	Phy Plan Pavolites	
Madication Request	All Visits		All Visits 🔻		Clinical Research (3)	=- 0
Histories	Classification: All		No results found		cilitat Research (5)	
	Drively Doublast				On Study	Status Contact
Autrigies T Add	This Visit (0)		Imaging (0)	≣• ≎	ONC 5M CR 1234-567 Keychain 29/01/2018 TRAIN	On Study Grewal, Parvind
	-		Lines, Tubes, and Drains (0)	≣• ♥	TEST 617 (AGENSYS) AGS-16C3F- 11/01/2017	Off Study Ehrhardt,
CareConnect	d Arthus (3)				15-3	Payton
Clinical Research	- ALLE (V)		Patient Assessment (0)	≡• ≎	TEST ONC SM MK3475-252 Keynote 04/10/2017	Parvind
Diagnoses and Problems	Adenocarcinoma, breast		(El	=- 0		
Form Browser			Flagged Events (0)	=• ~		=- ^

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

CSTCLINTRIALS, STPARVIND D08x66-Jan-1990 MRN:700005511 Code Status: Process:On Res Age:28 years Enc:700000016492 Disease: Disease: Allergies: Nuts Gender-Female PHN3976752114 Dosing Wt:50 kg Islation:	earch Study
Age:28 years Enc;700000016492 Disease: Allergies: Nuts Gender:Female PHN:9876752114 Dosing Wt:60 kg Isolation:	
Allergies: Nuts Gender:Female PHN:9876752114 Dosing Wt:60 kg Isolation:	
Menu 🧧 < > - 👘 Clinical Research	
Ambulatory Summary	
Oncology Control of the second	
Orders + Add Clinical Trial/Study Enrollment History for Patient	
Single Patient Task List Protocol Name Enrolment ID On Study Date Off Treatment Date Off Study Date Stratum Contact Info	
MAR I IEST UNUS M MIS475-252 Keynole UTS UH-Ud-2017 Breval, Parind.	
MAR Summary GOL SM CR 1234567 Keychain TRAIN 12345 29Jan-2018 Grewal, Pavind	
Interactive View and 18:0	
Results Review Linital Protocol 11 Jan-2017 19-Dec-2017 Active Comparator: Asthrab	
Documentation + Add	
Medication Request	
Histories	
Allergies 🕂 Add	
CareConnect	
Clinical Research	

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

2	2			
ſ	Clinical Trial/Study Enrollment History for Patier	nt		
	Protocol Name	Enrollment ID	On Study Date	Off Treatment D
	TEST ONC SM MK3475-252 Keynote	015	04-Oct-2017	
	Amendment 2		04-0ct-2017	
	ONC SM CR 1234-567 Keychain TRAIN	12345	29-Jan-2018	
	Initial Protocol 1		29Jan-2018	
	ТЕЗТ 617 (АGENSYS) АGS-16C3F-15-3	TEST1004584	11-Jan-2017	
	L Initial Protocol		11-Jan-2017	

4





7 The Select Documents to View screen appears.

Select Documents to View	
STUDY CONTACT INFO Prohibited Drugs TRAIN	OK Cancel

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 \blacksquare icon.

<	🔉 🔹 者 Clinical Research			
	Clinical Trial/Study Enrollment History for Patien	t		
	Protocol Name	Enrollment ID	On Study Date	Off Treatment Da
	TEST ONC SM MK3475-252 Keynote	015	04-Oct-2017	
	Amendment 2		04-0ct-2017	
	ONC SM CR 1234-567 Keychain TRAIN	12345	29-Jan-2018	
	L Initial Protocol		29-Jan-2018	
	TEST 617 (AGENSYS) AGS-16C3F-15-3	TEST1004584	11-Jan-2017	
	L Initial Protocol		11-Jan-2017	

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

< 🔹 🔹 🚹 Clinical Research			
■ ■2 Clinical Trial/Study Enrollment History for Patient			
Protocol Name Enrollment ID On Study Date O Image: TEST DNC SM MK3475:252 Keynote 015 04-0ct-2017 LAmendment 2 04-0ct-2017 04-0ct-2017 Image: DNC SM CR 1234-567 Keychain TRAIN 12345 23-Jan-2018 Linital Protocol 29-Jan-2017 11-Jan-2017 Linital Protocol 11-Jan-2017 11-Jan-2017	ff Treatment Date Off Study Date Stratum P with A 19-Dec-2017 19-Dec-2017 Active Comparator:	Cohort Contact Info Grewal, Parvind Treatment A Ehrhardt, Pavton or: Axitinib	
In the train domain, there is no scanned consent.	Consent Information Name: CSTCLINTRIALS, STPARVIND Consent Name Consent Type Signed Date Display only signed consents?	Protocol: ONC SM CR 1234-567 Keychain TRAIN Returned Date Amendment	



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.

🕇 Add

Orders

Single Patient Task List



Activity 5.1 – Placing Orders 1 From the patient's chart click on the Add button from the Orders tab in the menu. <u>CSTCLINTRIALS, STPARVIND</u> <u>Allergies: Nuts</u> <u>Menu</u> <u>Menu</u> <u>Menu</u> <u>Menu</u>

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.**

P ClinicalTrialOncologyNurse, Nellie - Add Order			
ClinicalTrialOn DOB:198 MRN:760C Age:29 y Enc:7600 Allergies: Nuts Gender:F PHN:107 D	ode Status: F C osing Wt:60 kg I:	Process:Cytotoxic Disease: solation:	Location:LGH Che Enc Type:Outpatient Attending:Train, Ge
Search: research test Advance Research Test ONC SM MK 3475-252 Research Test ONC SM Unresectable Research Test ONCP GU GUAJPG Research Test ONCP SM MK 3475-25 Research Test ONCP SM MK 3475-25 Research Test ONCP SM MK-3475-25 Research Test ONCP SM MK-3475-25 Research Test ONCP SM MK-3475-25 Research Test ONCP SM MK-3475-25 Research Test Screening2 Enter to Search	Type: Metastatic MK 3475-25 Gemcitabine CARBOpla 22 (Screening) 52 Cycle 1 apture	للله Ambulatory - In Oft	fice (Meds in Office) 👻
Clin	icalTrialOncologyN	Nurse, Nellie - 760(Done Done



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
No Cosignature Required
Cosignature Required Paper/Fax Electropia
OK Cancel



4 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 ON by TestON, Onco	ICP SM MK 3475-252 (Screening) - Cy logist/Hematologist-Physician, MD c	ycle 3 on 12-Dec-2017 10:49 PST	
Select Visit and Start Time			
This Visit	Estimated Start Date of Diagnostic	:s (Day 1)	
Future Inpatient Visit	In Day(s)		
Future Outpatient Visit	In Week(s)		
·	In Month(s)		
	Est. start 31-Jan-2018 🚔 💌 (0800 🌩 PST	
Confirm Phase Action		1	
Phase	Start Date/Time	Action	
Diagnostics (Day 1)	"Est. 31-Jan-2018 08:00 PS1		
Additional Review Settings			
Review Required			
Review Provider	M		
STCLINTRIALS, STPARVIN	D - 700005511	OK Cancel	

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

Address Book				
Internal				
Type a name or select from list:	1		Show names from	
pli			Global Address Book	•
Demonral O Dead	Distribution List			
Personnel Pool	Distribution List			
Right click to add/remove a name i	in the personal address book		Send to	
Name	Position	*	Name	
Plisvca, Rocco, MD	Physician - General Medicine		Plisyck Rayford MD	
Plisvcb, Stuart, MD	Physician - Emergency		r horen, nagrena, mo	
Plisvcc, Trevor, MD	Physician - Pediatrician			
Plisvcd, Mohammed, MD	Physician - Surgeon			
Plisvce, Noe, MD	Physician - Orthopedics			
Plisvcf, Dillon, MD	Physician - General Medicine	E		
Plisvcg, Joshua, MD	Physician - NICU	Add	3	
Plisvch, Max, MD	Physician - Pediatrician			
Plisvci, Brooks, MD	Physician - Anesthesiologist	Remove		
Diarci, Linwood, MD	Dhysician Deychiatrist			
Plisvck, Rayford, MD	Physician - Oncologist/Hematologist	2		
Filsvei, Antonio, IVID	Physician - OB/OTIN	_		
Plisvcm, Gerard, MD	Physician - Cardiologist			
Plisvcn, Herb, MD	Physician - Emergency			
Plisvco, Wesley, MD	Physician - General Medicine			
Plisvcp, Tracy, MD	Physician - General Medicine			
Plisvcq, Sherwood, MD	Physician - Nephrologist			
Plisver Carlton MD	Physician - Anesthesiologist	v		
More				
L				OK 4 Cancel
				Cancer

Click OK

Additional Review Settings	
Review Provider Plisvck, Rayford, MD ×	
CSTCLINTRIALS, STPARVIND - 700005511	OK Cancel



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.**

CSTCLINTRIALS, STPARVIND - Add Order		Decession Decession Church	
CSTCLINTRIALS, STPAR DOB06-040-040-040-040-040-040-040-040-040-0	nc:700000001	Disease:	Enc Type:Recurring
Allergies: Nuts Gender:Female Pi	HN:98767521 Dosing Wt:60 kg	Isolation:	Attending:
Search: tylenol	ons 🗸 Type: 🛵 Outpatient	•	
TYLENOL #1 EQUIV tab	di Search within: All	_	
TYLENOL #1 EQUIV tab PRN range dose TYLENOL #2 EQUIV tab			
TYLENOL #2 EQUIV tab PRN range dose			
TYLENOL #3 EQUIV tab TYLENOL #3 EQUIV tab PRN range dose			
TYLENOL #3 EQUIV take home med			
TYLENOL long acting			
Enter to Search			
		CSTCLINTRIALS, STPA	RVIND - 700005511

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		
⊿ Medications		
🔲 😣 acetaminophen (TYLE Order 🛛 🛛 start: 30-Jar	-2018 13:44 PST	
This notification icon means you need to complete the medication Details		
■ Details for acetaminophen (TYLENOL PRN r.	ange dose)	
+ € III. ↓ ≥		Remaining Administrations: (Unknown) Stop: (Unknown)
*Single Minimum Dose:	*Single Maximum Dose:	
*Dose Unit:	*Route of Administration:	✓
*Frequency:	PRN:	Yes No
*PRN Reason:	Duration:	
Duration Unit:	Drug Form:	×
First Dose Priority:	*Start Date/Time: 30	-Jan-2018 13:44 PST 🗸
Stop Date/Time:	ST 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 ^{So} icon next to the NM Liver and Spleen Sulfur Colloid.

View	Ξ	u ⊻		•	
Orders for Signature		Res Ado	iearo litio	ch To nal r	est Screening2 - Cycle 1, Diagnostics (Day 1) (Future Pendir review required. Review request will be sent to Plisvcw, Ty
Plans Document In Plan Oncology			S	\$	Component
Greesearch Test Screening2 - Cycle I Screening- Labs (Day 1) (Future Pending, 2) Diagnostics (Day 1) (Future Pending) 3 Suggested Plans (0)	8	•			CT Chest Abdo Pelvis w/ Contrast Urgent, Reason: Research, Order for future visit, Scheduling Research- Non-Reportable
 Orders Admit/Transfer/Discharge Status 					Electrocardiogram 12 Lead (ECG 12 Lead) Urgent, Order for future visit Research- Reportable
Patient Care Activity Diet/Nutrition		₽	4		US Abdomen Urgent, Reason: Research- testing, Order for future visit, Sch Research: Non-Reportable
Continuous Infusions Medications				8	M Liver and Spleen Sulfur Colloid Urgent, Reason: Research - testing, Scheduling Location: LG Research-Reportable

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

	A 6	7	Component	Status	Dose	Details		
⊿	Resea	rch Te	est ONCP SM MK 3475-252 (Screening) - Cycle 4, Di	agnostics (Day 1)	(Future Pen	ding) *Est. 31-Jan-2018 08:00 PST - 21 Days		
	Additi	onal r	review required. Review request will be sent to Plis	vck, Rayford, MD).			
		Z	CT Chest Abdo Pelvis w/ Contrast			Urgent, Reason: Research, Order for future visit, Sched Research- Non-Reportable	luling Locations: LGH Med Imaging, Research Study: Test Research	
2		Ż	Electrocardiogram 12 Lead (ECG 12 Lead)		-	Urgent, Order for future visit Research- Reportable		
7		Ż	US Abdomen			Urgent, Reason: Research- testing, Order for future vis Research: Non-Reportable	it, Scheduling Location: LGH Med Imaging	
	8	3 🖄	NM Liver and Spleen Sulfur Colloid		•	T;N, Urgent, Reason: Research - testing, Weight: 60 Research-Reportable), Height: 160, Order for future visit, Scheduling Location: LGH N	И
T	Details	s for	NM Liver and Spleen Sulfur Co	lloid				٦
đ	🏷 De	tails	🗊 Order Comments 🛛 🛞 Offset Details 🗋					
	+ %	i III.	\mathbf{D} \ge					
	Request	ted St	art Date/Time:	PST		*Priority:	Urgent 🗸	
		*Rea	son for Exam: Research - testing			Special Instructions / Notes to Scheduler:		
		Г	*Pregnant: 🚫 Yes 🚫 No					
		⁺B	Breastfeeding: Yes No			*Weight (kg):	60	
	Provide	er Call	lback Number:			Special Handling:	×	
			CC Provider 1:			CC Provider 2:		
			CC Provider 3:			*Scheduling Location:	LGH Med Imaging	
								_
	Irders Fo	ır Cosig	gnature Orders For Nurse Review Save as My Favor	ite			Orders For Signatu	re

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





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

	Component		Status	Dose	Details		
⊿ Kes Add	earch Test ONCP SM M	IK 3475-252 (Screening) - Cycle 4, Beview request will be sent to P	Diagnostics (Day	y 1) (Future Pe MD	ending) *Est. 31-Jan-2018 08:00 PST - 21 Days		
7	🖄 CT Chest Abd	o Pelvis w/ Contrast	ister, nagrora,		Urgent, Reason: Research, Order for future visit, Sche Research- Non-Reportable	duling Locations: LGH Med Imaging, Re	search Study: Test Research
7	🖄 Electrocardio	gram 12 Lead (ECG 12 Lead)			✓ Urgent, Order for future visit Research- Reportable		
7	🖄 US Abdomen				Urgent, Reason: Research- testing, Order for future vi Research: Non-Reportable	isit, Scheduling Location: LGH Med Imag	ging
7	🖄 NM Liver and	Spleen Sulfur Colloid			T;N, Urgent, Reason: Research - testing, Weight: 6 Research-Reportable	i0, Height: 160, Order for future visit,	Scheduling Location: LGH
Z Deta	ails for NM Liver	and Spleen Sulfur C	olloid				
Det	tails 🗊 Order Comme	nts 🕑 Offset Details					
Τ.							
Requ	ested Start Date/Time:	** *** **** A	PST		*Priority:	Urgent 🗸	
Requ	ested Start Date/Time:	Research - testing	PST		*Priority: Special Instructions / Notes to Scheduler:	Urgent 💌	
Requ	ested Start Date/Time: *Reason for Exam: *Pregnant:	Research - testing	N PST		*Priority: Special Instructions / Notes to Scheduler:	Urgent v	
Requ	ested Start Date/Time: *Reason for Exam: *Pregnant: *Breastfeeding:	Research - testing Yes No Yes No	PST		*Priority: Special Instructions / Notes to Scheduler: *Weight (kg):	Urgent • 60 •	
Requ	ested Start Date/Time: *Reason for Exam: *Pregnant: *Breastfeeding: ider Callback Number:	Research - testing Yes No Yes No	PST		*Priority: Special Instructions / Notes to Scheduler: *Weight (kg): Special Handling:	Urgent • 60 •	
Requ	ested Start Date/Time: *Reason for Exam: *Pregnant: *Breastfeeding: ider Callback Number: CC Provider 1:	Research - testing	TZ9 A		*Priority: Special Instructions / Notes to Scheduler: *Weight (kg): Special Handling: CC Provider 2:	Urgent	
Requ	ested Start Date/Time: *Reason for Exam: *Pregnant: *Breastfeeding: ider Callback Number: CC Provider 1: CC Provider 3:	Research - testing Ves No Ves No	Test and tes		*Priority: Special Instructions / Notes to Scheduler: *Weight (kg): Special Handling: CC Provider 2: *Scheduling Location :	Urgent	
Requ Prov	Imit Imit Imit Imit Imit Imit	Research - testing Yes No Yes No	T29 x		*Priority: Special Instructions / Notes to Scheduler: "Weight (kg): Special Handling: CC Provider 2: *Scheduling Location:	Urgent	

13 Click Sign

	» 🤊 🖻	3 7 C	Order Name	Status	Start	Details	
Δ	LGH Chen	no; IV V	VR Enc:7000000164	92 Admit:	12-Dec-2017 10:45 P	ST	
⊿	Medicatio	ns					
	_ ე გ	👡 a	cetaminophen (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						
⊿	Diagnosti	c Tests					
		C 🖬	T Chest Abdo Pelvis v/ 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 / Research-Non-Reportable	Account; 123
		E E	lectrocardiogram 12 ead (ECG 12 Lead)	Order	31-Jan-2018 08:00 PST	31-Jan-2018, Urgent, Order for future visit Research- Reportable	
•		🛃 U	JS 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	
•		N S	IM Liver and Spleen ulfur 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 Imagin Research-Reportable	ıg, Research
	ctails						
0 M	issing Requ	uired Det	ails Orders For Cosig	inature 0	rders 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.



FATIENT 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

1



Activity 6.1: Discontinue a Patient in PPM

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.

P CSTONC, TONYA - 700008480 Opened by Test	tON, OncologyAmbulatory-Nurse1				
Task Edit View Patient Chart Links	Navigation Help				
🗄 🎬 Ambulatory Organizer 🖃 Message Centre 👔	🎬 CareCompass 🎬 Clinical Leader Organize	r 🛉 Patient List 🚨 Multi-Patient '	Task List Tracking Shell 😂 Staff Assign	ment 👫 LearningLIVE 🚽 🧟 CareConnect 🔕 PHSA PACS 🕲 VCH and	I PHC PACS 🕄 MUSE 🕄 FormFast WFI 💡
🔀 Tear Off 📲 Exit 🎬 AdHoc 🎟 Medication :	Administration 🍰 PM Conversation 👻 🎼 D	epart 🔩 Communicate 🔹 🗿 Med	ical Record Request 🔸 Add 👻 🏙 Scher	duling Appointment Book 👩 Documents 🖨 Discem Reporting Portal 🦉	Patient Locator 📳 Protocol Office Manage 🍖 Patient Protocol Manager 🛫
Q Patient Health Education Materials Q SHOP	Guidelines and DSTs 🔞 UpToDate				
CSTONC, TONYA 🔳					- List - Mi Recent - Name - Q
CSTONC, TONYA	DO8:29-Jan-1985	MRN:700008480	Code Status:	Process:	Location:LGH Chemo; IV WR
All sectors and shine	Age:33 years	Enc:700000015776	manufacture statement for	Disease:	Enc Type:Recurring
Allergies: penicillin	GenderFemale	PHIN5/6/0421/01	Dosing weed kg	Isolation:	Attending:

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

PPH PowerTrial	: Patient Protocol Manager					
<u>T</u> ask <u>V</u> iew <u>H</u>	lelp					
√ ✔ ∉	🗐 🔀 🔻 🗹 🔩 💖 Fyr Ps 🕸 🖬 🎇 🔎) 🚑 🎰 🛅 7	§ 📡 🗟 🖉			
Enrollment	View/Edit Enrougent	2				
2/	Ari allonis Entolled Patient (Jount: 3				
	🖂 🐓 All Protocols	Last Name	First Name	MBN	Enrollment ID	On Study C
Pendina Sia	🕀 🗁 BC Cancer - Abbotsford Centre	CSTCLINTRI	STPARVIND	700005511 - MRN	123 15	29Jan-2018
	🕀 🗁 BC Cancer - Center Southern Interior	SCOTTLEARN		700008070 - MEN 700004976 - MEN	123455	26-Jan-2018
	🕀 🗁 BC Cancer - Centre for the North	SCOTTELEANN	MADI	700004376 - MININ	1001	01-Dec-20
1	🕀 🕞 BC Cancer - Fraser Valley Centre					
All Patients	🕀 🕞 BC Cancer - Vancouver Centre					
Enrolled	🕀 🕞 BC Cancer - Vancouver Island Centre					
1	🕀 🕞 BC Children's Hospital					
\checkmark	🕀 👉 BC Women's Hospital					
To Be Verified	🛱 🚝 Lion's Gate Hospital					
10 DC VCIIICO	- 🗁 Archive					
1	🕀 🥱 Oncology Chemo Clinic					
	ONC SM CR 1234-567 Keychain TR					
Still On Study	TEST2 ONC SM MK 3475-252 Keyn					



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

🖏 Current Enrollment			— ×
Name: CSTCLINTRIALS, STPARVIND	Medi 7000	cal Record Number 005511 - MRN	s: •
Protocol:			
UNC SM CR 1234-567 Keychain TRAI	N - Initial Protoco	bl	
Enrolling Off Treatment Off Study]		1
* Off study date			
* Removal person:			
			<u></u>
* Removal institute:			
			<u> </u>
Removal reason:			
			<u>-</u>
Current enrollment information			
Protocol/Amendment/Revision	On study date	Enrollment Id	
Initial Protocol	29Jan-2018	12345	
			el 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:		Medical Recor	d Numbers:	
CSTCLINTRIALS, STPARVIND		700005511	- MRN	-
Protocol:				
ONC SM CR 1234-567 Keychain TRAIN	- Initial F	Protocol		
Enrolling Off Treatment Off Study				1
* Off study date 30-Jan-2018				
* Removal person:				
Grewal, Parvind				<u> </u>
* Removal institute:				
LGH Chemotherapy Clinic				-
Bemoval reason:				
Completed Study Treatment	-			–
Completed Study Treatment				
Excessive Toxicity				
Failure to Respond				=
Major Protocol Deviation				
Other Patient/Parent Request				-
· · · · · · · · · · · · · · · · · · ·				1
		<u> </u>	Cancel	Apply

Then, click **OK**

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





6 Now, review the patient's status.

E 👮 All Protocols	Last Name	First Name	MBN		Enrollment ID	On Study	Off Treatment	Off Study	Amendment	Revision	Stratum	Cohort
🗄 🗁 BC Cancer - Abbotsford Centre	CSTCLINTRI	STPARVIND	700005511	- MRN	12345	29-Jan-2018	30-Jan-2018	30-Jan-2018	Initial Protocol		P with A	Treatment
🗄 🛱 BC Cancer - Center Southern Interior	SCUTT-LEARN	JUY	700008070	- MHN	123456	26-Jan-2018			Initial Protocol		P with A	Treatmer
BC Cancer - Centre for the North	SCOTT-LEARN	MARY	700004976	MRN	001	01-Dec-20			Initial Protocol		P with A	Treatmen
BC Cancer - Fraser Valley Centre												
BC Cancer - Vancouver Centre												
🕸 🦰 BC Cancer - Vancouver Island Centre									Now t	he date	annea	rs for
🕸 🦰 BC Children's Hospital									both		atment	and
🗄 🦰 BC Women's Hospital									Doui		auneni	anu
🛱 🦰 Lion's Gate Hospital										Off St	tuay	
- 🕞 Archive									1			
🗄 🦰 Oncology Chemo Clinic												_
Concology Chemo Clinic												Ĩ
I PART INC SM CD 1234-367 NEVCHAIN I D												

- 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.

Remember how to review the Clinical Research component?

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

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

Key Learning Points

6

- 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.

ibulatory-Nurse1			
Leader Organizer 🍐 Patient List 😫 Multi-Patient Task List 🛛 Tracking Shell 😹 Staff Assignment 🎬 LearningLIVE 🗉	CareConne	ct 🔞 PHSA PACS 🔞 VCH a	nd PHC PACS 🔞 MUSE 🔞 FormF
ersation 👻 🖟 Depart 🔄 Communicate 👻 🗎 Medical Record Request + Add 👻 🛱 Scheduling Appointment Book	Documents	Discern Reporting Portal	🛿 Patient Locator 🛃 Protocol Off
FoDate 👳			

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

e		Rep	orting Po	rtal	
Reporting Portal					
Reporting Portal				Q Search	
Filters	All Reports (1)	My Favo	rites (0)		
	Report Name		▼ Ca	tegories	
Source	Research Billables	Report	Re	search	
 Categories All Oncology (0/14) Research (1/1) 					
Recent Reports					
Visits without Charges					
Advance Directives - Oncology Outpatient					
Number of Cancers Diagnosed					
Research Billables Report					



3

1. Click on the Research Billables Report

2. Click Run Report

Filters	All Reports (1)	My Favorites	(0)				1 0
	Report Name		Categories		Source		Favorite 🗢
Source	Research Billabl	les Report 1	Research		Public		\overleftrightarrow
 Categories 	Description: Passed Testing: NO (replace with YES after completed)	Suggested Report User: Suggested Report	Reporting Application: CCL Alternate Name: BC_ALL_ONC_RESEARCH_BILL_LY	T:DBA	Run Repor	n Report t in Back	: 2 kground
	Tested By:	Frequency:			View F	revious	kun

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.

Discern Prom	pt: BC_ALL_ONC_RESEARCH_BILL_LYT:DBA	-		×
	BC Children's Hospital BC Women's Hospital C Lion's Gate Hospital Hichmond Hospital C C D U Live 7 L		>	~
Initating Sub Service (Powert rial Sub Folder)	INITIATING_SUB_SERVICE INITIATING_SERVICE			
	Archive Lion's Gate Hospital			
*Order Performed Start Date	01-Jan-2018 🚖 🗸			
*Order Performed End Date	08-Feb-2018			
De-identify Patient Data?	\checkmark			
Additional Filter	 No Additional Filter Filter By Patient Enrollment Id Filter By Orderable Category(s) 			
Sort By Protocol Name then	Location, Sublocation, Entry Date 🗸 🗸			
<				>
Return to prompts on close of output	Execute Cancel			



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

					Resea	rch Billa	bles Report		
	Submitted By	y:	TestON, OncologyAmbulatory	-Nur					
	Submitted Or	n:	08-FEB-2018				Date Rang	e: 01-JAN-2018 t	o 08-FE
Report Mode:		e:	Billing Cyle				Deidentifie	d: Yes	
Search By:			Inititating Service		Filtered By: No Filter Applied				
Initiating Service(s): Lion's Gate Hosp			Lion's Gate Hospital			Initia	ting Sub Service(s	s): All	
	Protoc	ol Name:	TEST ONC SM MK3475-252 Keyno	te					
	Study Accou	nt Name:	Test Research Account; 123153						
	Protocol Status	S	Primary Investigator		Site #	Location	Sub	-Location	
	Protocol Status Open to Accrual	s I	Primary Investigator PLISVFR, Raisa, MD		Site # 678	Location	Sub Hospital	-Location	_
	Protocol Status Open to Accrual Enrollment ID	s Encoutre Type	Primary Investigator PLISVFR, Raisa, MD Pr Order Name	Order Type	Site # 678 Comple	Location Lion's Gate	Sub Hospital Entry Date	Ordered Location	Power
	Protocol Status Open to Accrual Enrollment ID 006	s Encoutne Type	Primary Investigator PLISVFR, Raisa, MD Order Name t CT Chest Abdo Pelvis w/ Contrast	Order Type	Site # 678 Comple 01-FEB-	Location Lion's Gate Ate Date	Sut Hospital Entry Date 01-FEB-2018 10:47	Ordered Location	Power 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

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



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



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





4 Click OK

Report Selection		x
Report to run:		
Enrollment Report		~
	OF 1	Canad

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**

Enrollment Report Prom	pt	
Output to File/Printer/MINE	MINE	• 8
Protocols	NSCLUNGCAX1107 NuMom2Be ONC MM 4392851 Relapse ONC 5M CR 1234-567 Keychain TR ONC01 ONC0P BR BRAJFECDT OVARCA246 Receivest III	
Accrual numbers	Trial Wide Accrual	•
Order By	Protocol	•
Output type	Formatted Report	•
Delimiter		
✓ Return to prompts on close	of output.	Execute Cancel
Choose one or more protoco	ols	li.



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

t Viewer - Enrollment Rep Click this ic print this re	con to eport	a 100% - 🍋	To close ti report, clict this icor T rial Wide Accr Ordered	nis con u al Totals per Protocol d by protocol				
ProtocolMnemonic	Activation Date	Status	T rial Wide Current Accrual	Projected Accrual Amount	T rial Wide T arget Accrual	% of Total	Sponsor	
ONC 8M CR 1234-567 Keychain TRAIN	01/12/17	Open to Accrual	-	20	600	0.7%	Incyte Corporation	
Total Protocols Selected: 1 Total Patients Accrued: 0								
								-
	t Viewer - Enrollment Rep Click this ic print this re ProtocolMnemonic ONC SM CR 1234-567 Keychain TRAIN Total Protocols Selected: 1 Total Patients Accrued: 0	t Viewer - Enrollment Report	t Viewer - Enrollment Report	t Viewer - Enrollment Report Click this icon to print this report ProtocolMnemonic Activation Date Status Trial Wide Current Accrual ONC SM CR 01/1217 Open to Accrual - I234/567 Keychain T rotal Protocols Selected:1 T otal Patients Accrued:0	t Viewer - Enrollment Report Click this icon to print this report Click this icon to print this report ProtocolMnemonic Activation Date Status Trial Wide Accrual Totals per Protocol Ordered by protocol ProtocolMnemonic Activation Date Status Trial Wide Accrual Amount ONC SM CR 1234-567 Keychain RAN Total Protocols Selected:1 Total Patients Accruad:0	t Viewer - Enrollment Report To close this report, click on this icon Click this icon to print this report ProtocolMnemonic Activation Date Status Trial Wide Current Accrual Accrual Amount Trial Wide Current Accrual Amount Trial Wide Current Accrual Amount Control 1234;567 Keychain RAAN Total Protocols Selected:1 Total Patients Accrued:0	t Viewer - Enrollment Report Click this icon to print this report Click this icon to print this report Click this icon to protocol Mnemonic Activation Date Status Trial Wide Current Accrual Totals per Protocol Ordered by protocol Protocol Mnemonic Open to Accrual - 20 600 0.7% 1234-567 Keyschain TRAIN Total Protocols Selected:1 Total Patients Accruad:0	t Viewer - Enrollment Report Click this icon to print this report Click this icon to protocolMaemonic Activation Date Status Trial Wide Accrual Trial Wide Accrual Manount Trial Wide Target Accrual % of Total Sponsor ONC SM CR 01/1217 Open to Accrual – 20 600 0.7% Incyte Corporation Total Protocols Selected:1 Total Patients Accruad:0

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.**

Enrollment Report Prom	pt		×
Output to File/Printer/MINE	MINE	• 8	
Protocols	NSCLUNGCAX1107 NuMom2Be ONC MM 4392851 Relapse ONC SM CR 1234-567 Keychain TRA ONC01 ONC01 ONCP BR BRAJFECDT OVARC4246 ✓		
Accrual numbers	Trial Wide Accrual	•	
Order By	Protocol	•	
Output type	Formatted Report	•	
Delimiter			
Return to prompts on close	e of output.	Execute	Cancel
Choose one or more protoc	ols		//



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.

Connect 🔃 PHSA PACS 🔃 VCH and PHC PACS 🔃	MUSE 🕄 FormFast WFI 💡
nents 🗃 Discern Reporting Portal Patient Locato	Protocol Office Manager
	List 👘 Recent 🗸 Name 🗸 Q
ocess:	Location:LGH Chemo; IV WR
sease:	Enc Type:Recurring
vlation:	Attending:

- 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.