# Getting Ready for Connect Care

## Getting Ready for Research Conversion

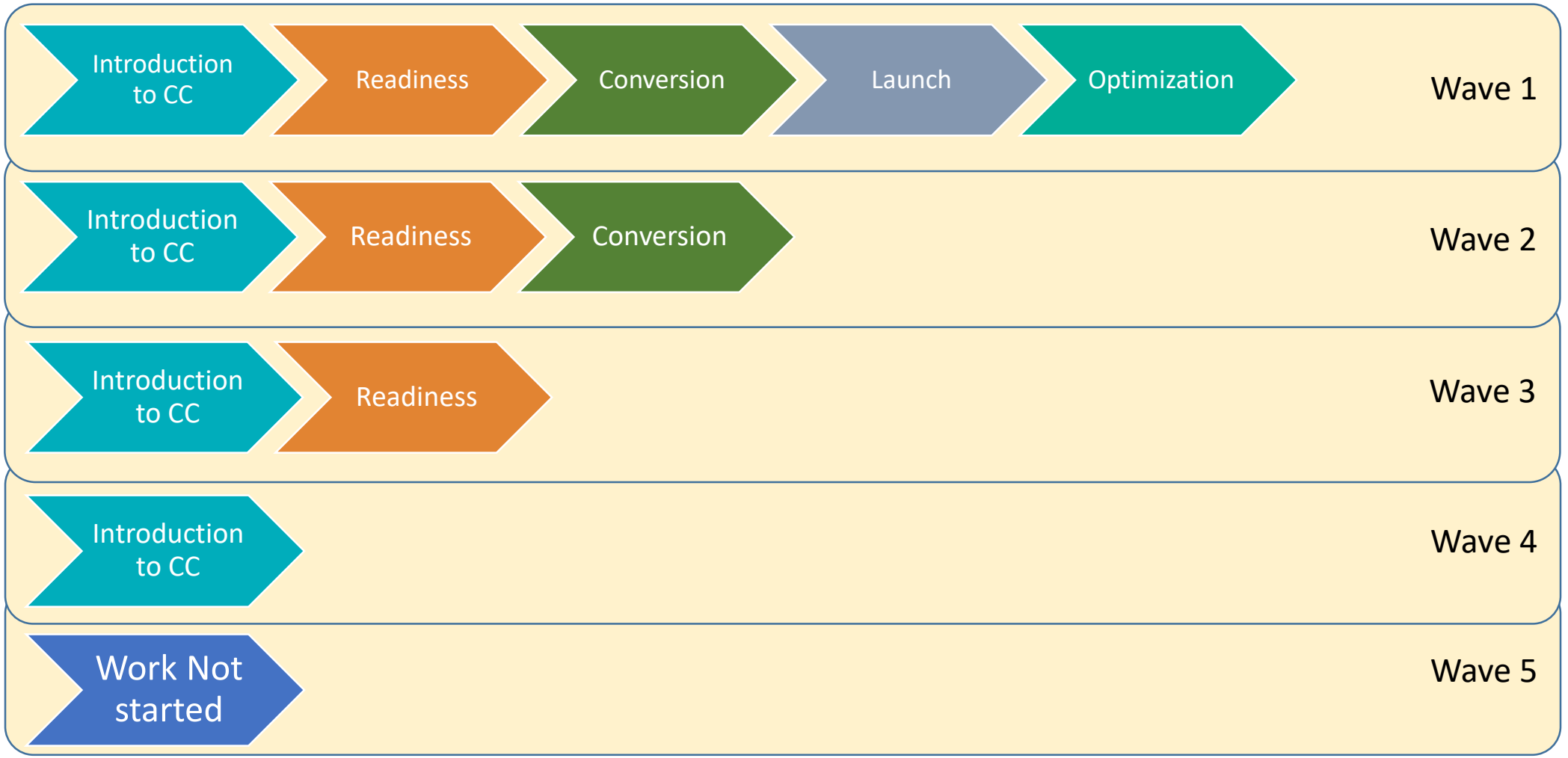
Alberta Health Services
Connect Care

# What Studies are In-scope for Launch?

## Clinical research projects that meet any of the following criteria:

- **Interventional trials and device studies**
- **Research-specific visits that will be scheduled in Connect Care**
- **Requires the use of recruitment tools, or research-study specific order entry or documentation**
- **Requires release of information to outside study monitors**
- **Coordinators require notifications of ED arrivals or admissions**
- **Incorporates billable items (i.e. observational studies with labs or other testing)**

# Connect Care Research Wave Implementation - Progress



# Research Workflows: Expected to be in-system

| EXPECTATION | DESCRIPTION | REASON |
|---|---|---|
| **Study Information Management** | Applicable information related to the research study is properly entered and maintained. | • Patient Safety<br>• Integration<br>• Visibility |
| **Study Status Management** | Study status in the CIS accurately reflects the current study recruitment stage. | • Integration<br>• Recruitment enhancement |
| **Patient Association & Recruitment Management** | Study patients are linked to the respective research study, their recruitment status is up to date and Informed Consent Forms are scanned into their chart. | • Patient Safety<br>• Visibility<br>• Integration |
| **Scheduling Management** | Encounters and visits related to research are linked to the respective study. | • Visibility<br>• Integration |
| **Documentation, Safety Reporting & Ordering Management** | Study related ordering (meds and tests) are done in-system and all clinically relevant information is available to the care teams. | • Patient Safety<br>• Visibility<br>• Integration |
| **Service Charge Management** | Charges are reviewed and reconciled. | • Transparency<br>• Financial accuracy<br>• Integration |

# What does Research Conversion mean?

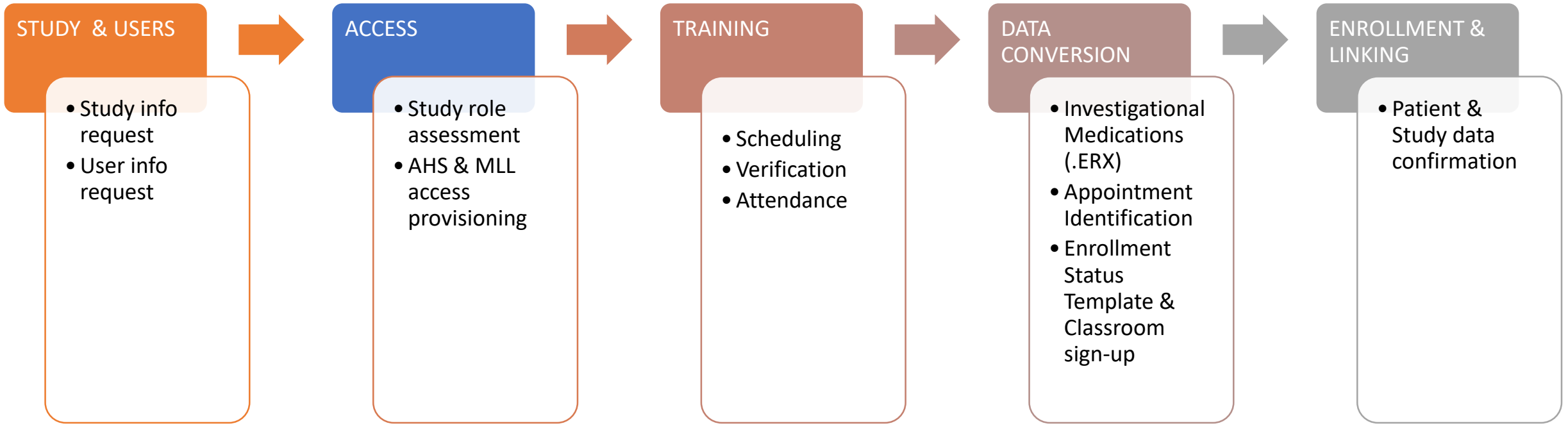
- Studies are correctly loaded in the Connect Care system
- Patients and future encounters are associated to the correct research studies
- Virtual Conversion Classroom sessions will be scheduled with live support and ‘how-to’ guides for staff while working on their studies in the virtual session
- The conversion session will include:

  Part 1: Patient Enrollment and

  Part 2: Encounters & Personalization
- Most coordinators will need from 1 to 3 hours to complete Part 1 and Part 2

**Attendance by at least 1 representative per study is required in the virtual classroom with the strong recommendation that the entire study team participate altogether during the session.**

# Setting Up the Research Study and Research Team in Connect Care (Conversion)



# Conversion Part 1:

## Verify Studies

## Enroll Patients

# What you will do:

- Verify that your study info is accurate
- Enroll all active research patients for Wave 2 studies in your respective studies
- **At least one representative from every study** must attend conversion sessions to complete this work
- Your team only needs to attend ONE of these sessions

# Preparing for Part 1: What to Have Available

- Study information including (where applicable): study team members, REB approval and expiry dates, CTCAE version for adverse events, list of contraindicated meds, names of study arms.
- Your roster of patients actively enrolled or being recruited your studies
  - Access to multiple patient identifiers (Name, DOB, ULI) so you can search for your patients
  - Be prepared to access any information that may be stored in a document or another system

Template for Patient Data (to be sent via email following your registration to a virtual classroom session):

| **Required** | **Required** | **Required** | **Required** | *Required if over 100 patients* | *Required if fewer than 100 patients* | *Required if fewer than 100 patients* | **Required** | *Optional* | *Optional* |
|---|---|---|---|---|---|---|---|---|---|
| Research Study Name (Short Title) | Site (Location) | REB Number | Patient ID Number (ULI preferred) | Patient ID Type (choose from list, ULI preferred) | Patient Name | Patient DOB (DD/MM/YYYY) | Current Enrollment Status | Study Arm / Branch | Study Participant ID |
| Sample Study | University of Alberta Hospita | Pro000012 | 123456789 | ULI | Mouse, Micke | 25/01/1955 | Enrolled | | |
| Sample Study | University of Alberta Hospita | Pro000012 | 456789123 | ULI | Duck, Donald | 14/02/1965 | On Follow-Up | | |
| | | | | | | | | | |
| | | | | | | | | | |

# Conversion Part 2:

## Link Encounters

## Document Investigational Meds

## Personal Settings

# What you will do:

- To ensure that future research encounters are linked to the appropriate study in the CIS, this must happen after all future appointments are loaded into Connect Care
- Add investigational medications to patient charts, as needed
- Create preference lists to make workflows easier at launch
- Set up personalized reports, as needed

# Preparing for Part 2: What to Have Available

- A list of future, study-related visits
  - Clinic department where the patient will be seen
  - Providers who the patient will see
- A list of medications details (investigational or SOC) for your research studies
- A list of common orders, a current order sheet, or information from your study protocol
  - Know if they are in patient or out patient orders
  - You will use this to create preference lists for yourself and your study team

# When & Where: Times and Location

Dates & Times for Research Conversion Virtual Classroom Sessions:

- Oct 8th – 0830 – 1130hrs
- Oct 14th – 0830 – 1130hrs
- Oct 14th – 1230 – 1530hrs

Location: Zoom information provided in your session confirmation email

# Preparation: How to Register for Conversion

**What you will need to do:**

- Ensure one team member responds to the Doodle Poll sent with this meeting invitation
  - Indicate your top 2 preferred dates and timeslots for the virtual classroom
  - The Connect Care Support Team for Research will send your team delegate an email confirming the date and time for your session
  - The confirmation email will also contain a series of supporting materials that you will need to access during the classroom session
- Make sure you have all listed information available to your team during your sessions

Email cc.research@ahs.ca if you have any questions

# Support and Resources

## Support Available

- Norms – Charting Etiquette for Research
- Quick Start Guides, User Guides, FAQs

## Post-launch VOH

## Additional Resources

- Clinical Inquiry Newsletter
- Recorded and upcoming webinars
- HSA website

# We are here to answer your questions.

**Contact Connect Care:**
CC.Research@ahs.ca



Alberta Health Services
Connect Care

## Questions

**1) How do principle investigators manage orders that are sent to them for research studies?**

**A:** Investigators can sign, revise, or cancel orders which are sent to their Connect Care In Basket in the CC'd Charts section. There is a tip sheet (Provider Workflow - Signing Pended Orders) that outlines the steps for signing orders for investigators.

**2) What is the difference between research conversion for studies and getting new studies approved in Connect Care after launch at my site?**

**A:** Research conversion applies to studies which exist in legacy systems, or on paper, that are taking place in a facility before Connect Care is live at that site. Once that site goes live, those studies undergo data conversion to transfer your study information into Connect Care. Once your site is live with Connect Care, any new studies you start after that date will undergo an assessment for Connect Care eligibility by the Health System Access (HSA) team. A research study record will be built and activated in Connect Care by HSA for your REB approved studies that are Connect Care eligible (in-scope).

**3) Can I get a link to online training for CVO (clinical view only) access?**

**A:** The request and provisioning process for CVO and read-write access is the same. Please complete the IT Access Request Form (http://bit.ly/1NTJabJ) and a member of HSA team will contact you about training.