



April 16, 2021

Connect Care Research Update



Happy Spring! Please review the information below as there are a number of new recommendations to support recruitment activities and some guidance released to support these approaches.

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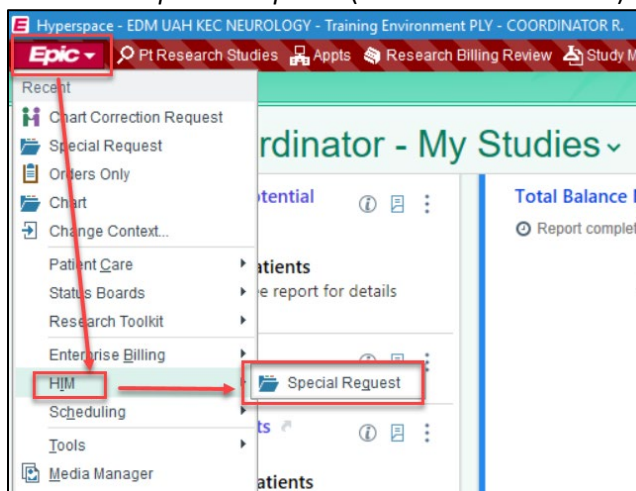
1. Research IT

a. Health Information Management (HIM) – Research staff can now request paper charts using the in-system Connect Care request

Date of Fix: March 2, 2021

System Update: Research staff can request paper charts using Connect Care, the **'Special Request'** button is now available and research staff are now able to use this button to complete the workflow outlined in the link below.

Description: Research users with the Research Coordinator or Research PhD Investigator user templates will now have access to the **Special Request** functionality (request for paper charts). This can be accessed via the EPIC menu from EPIC > HIM > Special Request, or by doing a Chart Search for *"Special Request"* (see screenshot below).



Impact to Users: If research users require access to patient legacy chart information for monitoring purposes, and the information has not been scanned into Connect Care, the study team must request the paper record(s) from HIM.

Please review the link below for more information on how to request the paper records from HIM: <https://insite.albertahealthservices.ca/Main/assets/cistr/tms-cis-tr-paper-chart-requests.pdf#search=paper%20chart>

Important considerations:

- Scanning of legacy paper charts has a 7-day turnaround.
- For release of paper charts, up to 10 charts may be requested at a time.

b. Department Specific Patient Lists and Permission to Contact Reports

System Update: A new Research report to identify patients who have consented to be contacted for research (screenshots below) as part of a department-specific patient list.

Description: Only relevant to departments that have utilized patient list functionality in Connect Care for in-system permission to contact registries. See education below for the use of these functions. This report leverages Patient List functionality to return patients who meet the criteria identified in the report's settings. The report has two default criteria: 1) Specified patient list, and 2) User – if the user does not have access to the patient list, there will be no results



returned in the report. To further narrow the patients returned in the report results, users may add additional criteria to the report settings, such as age and problems(s) identified on the Problem List.

Date of Fix: March 22, 2021

Impact to Users: Users can find the report located in the Report Library. If you would like to request additional criteria be made available in the report settings, please log an IT ticket, citing “research” as the ticket area.

The screenshot shows the Epic Hyperspace interface. The top navigation bar includes 'Epic', 'PT Research Studies', 'Appts', 'Research Billing Review', 'Study Maintenance', and 'My Reports'. The main content area is titled 'Library' and contains a search bar with the text 'permission to contact'. Below the search bar, there are two sections: 'Find Patients - Generic Criteria' and 'Find Patients for Research Studies (RWSQL)'. The 'RWSQL' section is expanded to show 'Matching reports' with a star icon next to 'Department Research Permission to Contact (1490979)'. A description below the report name states: 'This report will reflect all patients who are alive and consented to be in the department-sp time data. ...'

The screenshot shows the 'Report Settings' window for the report 'Department Research Permission to Contact (1490979)'. The window has tabs for 'Criteria', 'Display', 'Appearance', 'Summary', 'Print Layout', 'Toolbar', 'Override', and 'General'. The 'Criteria' tab is active, showing a 'Find Patient' section with a 'Find Criteria' input field containing the text 'Enter a search term, or click the search icon to browse available criteria'. Below this, there are sections for 'Patient list (specify patient list)' and 'User or Creator (Values determined when report is run)'. The left sidebar of the interface is visible, showing the 'Library' search results for 'permission to contact'.



c. Research Only Visit Types

System Update: The “Research Only” visit type has been added to all existing departments.

Issue: Some departments in Connect Care did not have a “Research Only” visit type available when scheduling an appointment for a patient.

Description: When booking an appointment with a patient, you can select “Research Only” as the visit type.

Date of Fix: March 19, 2021

Impact to Users: No noticeable impact. If you are scheduling an appointment and the “Research Only” visit type is not available, please log an IT ticket.

2. Education

a. E-consent – Guidance Document released by University of Alberta Health Research Ethics Board (HREB)

The ability to send a research e-consent through the platform of MyAHSCoconnect (Connect Care Patient Portal) is not yet available. Due to the volume of questions about this topic from the research community, we felt it would be prudent to share some existing resources and support.

Guidance: HREB has completed a guidance document about recommended practices and electronic platforms to gather consent remotely or electronically for research studies. This is complementary to the guidance that the University of Calgary previously released. The guidance document is available at <https://www.ualberta.ca/research/media-library/reo/human-ethics-files/forms-files/electronic-consent-guidelines-2021-01-18.pdf>.

University of Alberta Services: <https://help.redcap.ualberta.ca/policy-procedure/electronic-consents>

b. Charge Review – most frequently ordered tests

Are you confused by the names or description of orders showing up in your research charge review? Did you know we have a Research Charge Review Reference Guide? It’s available via [Insite](#) or from the Research Coordinator Learning Home Dashboard. It outlines the most



frequently ordered tests for research studies and how they will appear in the Research Billing Review activity report in Connect Care.

Additional Resources

Research Charge Review ⓘ ⋮

[Research Charge Review](#)

[Research Charge Review Reference](#)

c. How to use department specific patient lists and permission to contact reports

Setting up a New Department Specific Permission to Contact (PTC) List in Connect Care

- If you do not currently have a specific department permission to contact list, discuss this option with the relevant AHS program/department manager
 - Ensure no other PTC lists have been previously set up for that department
 - Ensure manager is aware what the PTC will be utilized for
- There are a number of approvals that should be in place to support PTC which may include a waiver of consent. Please refer to your REB approval and if you are unsure, please reach out to your Health System Access (HSA) advisor or email research.administration@ahs.ca.
- Guidance on what should be included in the permission to contact form can be found in Appendix A of the [tip sheet](#).

Translating Existing PTC list to Connect Care

- You may already be supporting your research study recruitment activities by gathering patients' names that wish to be contacted about research studies in a clinical department-specific permission to contact registry list.
- Your team might be tracking this via a spreadsheet or other method.
- Departments can utilize the patient list functionality in Connect Care to capture this information by adding these patients to in-system personalized lists. These lists can be shared and edited by other users within Connect Care. Furthermore, there is a specialized report that allows for patients to be filtered from this list to assist study teams in screening for potential study participants.

Best Practice Recommendations

- Identify two individuals who maintain and manage the list
 - Responsibility: add users who can access list & access level
 - Access level recommendation: add/remove patients [see below on how to implement this in system]
- If retroactively adding patients who have agreed to be on PTC → should upload permission to contact document into Connect Care
- Any user who adds a patient to the list → must upload permission to contact document



Workflow



Full Guidance/Tip sheet for this functionality is available via [Insite](#) or from the Research Coordinator Learning Home Dashboard. It covers the following items:

- General guidance on adding patients to department specific lists
- Best Practice Recommendations for setting up a PTC list in Connect Care
- Naming convention for uploading consent to contact
- How to make a department specific list in Connect Care
- How to share lists with users in Connect Care
- How to use the Department Permission to Contact Report to filter patients in screening for potential study participants
- Guidance on what needs to be covered in the Department Research to Permission to contact document (e.g. release of information, who can contact, and removal from lists process)

d. How to submit a request to update or inactivate an investigational medication record in Connect Care (.ERX record)

During your study, you may be required to update the INV Med Record either due to an error in the build or a protocol amendment. Further, once your study is complete and participants will no longer be prescribed the INV Med, you **must** submit a request to inactivate your INV Med Record in Connect Care.

To request an update or to inactivate an existing INV Medication Record, please open an IT Ticket (vFire ticket) to AHS Pharmacy at <https://insite.albertahealthservices.ca/cis/Page23730.aspx>.

- Select the option “If you have an issue that is **NOT URGENT** pertaining to workflows, orders, order sets, flowsheets, navigators, or have an enhancement idea.”;
- Enter your personal information including the best number to reach you at;
- Select the issue type as “Research”
- Indicate the department name and patient care setting
- Under issue, the user must enter “Send To Willow IP: Update or Delete INV Med Record”
- Under issue description, enter the following information:
 - Your department name
 - Medication name as it appears in Connect Care (full name)
 - Medication strength and form
 - Include the medication record # (if known)
 - Study name



- The requested change (if you need to update the name, please type it out how it should look like)
- The order set name if applicable
- Include screenshots of the problems encountered
- If you do need to provide patient information to resolve the issue, please limit it to the Medical Record Number

You will receive an email confirming your ticket has been submitted and whenever it has been resolved.

e. Super User Update

Are you a Wave 1 super user that would like to assist new research end users with future Connect Care implementations? At this time, we are looking for Wave 1 users who may also support research activities at the Glenrose Rehabilitation Hospital or Royal Alexandra Hospital in Edmonton.

For upcoming wave launches, your research colleagues across the province may require your enthusiasm and expertise. We are looking to recruit existing research end users who are familiar and comfortable with using Connect Care and in turn, would be available to contact, as a way to provide support to those Research Teams new to the system. Please contact cc.research@ahs.ca for more information.

Do you want to become even more ‘SUPER’? Super Users are on-site system knowledge and workflow champions, implementation experts, and support their colleagues to use new system features. Therefore, it is important that Super Users access and review all the available resources in preparation for Wave-specific Connect Care launches. There are resources that research super users may wish to have on hand. These include;

- [Connect Care Implementation Timeline \(albertahealthservices.ca\)](https://albertahealthservices.ca) for the most current implementation timeline.
- The AHS Connect Care Super User home page ([Super User Resources | Insite \(albertahealthservices.ca\)](https://albertahealthservices.ca)) or the research and other Learning Home Dashboards in Connect Care. This includes access to information such as need to know topics; what to expect during launch; view recordings; and to learn more about wave specific timelines; please visit
- [Super User Newsletter March 2021 \(albertahealthservices.ca\)](https://albertahealthservices.ca). Offers information about training requirements, how to become more ‘super’, and general materials for specific upgrades such as document scanning; COVID-19 precautions; and end user workflow information. Once you complete your research super-user training, please email connectcaresuperusers@ahs.ca to be added to the regular monthly newsletter distribution list.

3. Training

a. Research Staff ILT – virtual training

Research Staff ILT training is provided virtually through Zoom and is split into two 4-hour sessions spanning two days. Users must confirm that they have the required technical access



requirements for the course. Credentialed trainers meet with users in advance of the training session to ensure that each user can technically perform the virtual training. Of note, the prerequisite course for Research Staff ILT, Ambulatory Nurse Shared will continue to be provided as an in-classroom training.

- b. Upcoming Research Staff training dates – intended for Wave 1 & 2 new hires (not Wave 3-9 users)**
- i. May 12 & 13, 2021, 8:00am to 12:00pm
 - ii. June 2 & 3, 2021, 8:00am to 12:00pm

4. Communications

a. Most recent Clinical Inquiry Newsletter

You can find the most recent version of the provincial Clinical Inquiry newsletter (Research & Analytics) [online](#) if you did not receive it in your inbox.

b. Next research webinar

Our monthly open webinars are a great way to stay informed about research functionalities in Connect Care and upcoming readiness activities, such as training. Please join our monthly open sessions (via Skype). To request a webinar invitation, please contact: cc.research@ahs.ca

Next webinar: Monday, April 19, 2021, 12:00-1:00pm

Topic: How to create a patient list and how to use Department Specific Patient Lists for tracking permission to contact for research participants

You can find links to previously recorded webinars on the Health System Access [website](#) under the heading 'Presentations and Videos'. The Workflow Walkthrough webinar is available on the **Research Coordinator My Studies Dashboard**.

c. Recent AHS releases and communications

For further reading on Connect Care Inquiry and Research we encourage you to read the following:

- [Connect Care Byte](#)
- All research stakeholders (including non-AHS employees) can access an assortment of Connect Care research related information at: <https://extranet.ahsnet.ca/teams/AHSRA/SitePages/Home.aspx> (the right-hand side of the page in a section called 'Connect Care Resources')

d. Have you missed an update? Previously released newsletters archive

We have an archive of previous Connect Care Research updates at <https://extranet.ahsnet.ca/teams/AHSRA/SitePages/Home.aspx> under 'Newsletters'

5. Finding help for your questions

The Connect Care Research Support Team wants to ensure the timely resolution, proper documentation and reporting of your Connect Care-related questions and concerns to minimize potential risks to the safe delivery of patient care. So read on to ensure you know how to reach out for help.



For Urgent issues (including login or device concerns) or IT related issues call 1-877-311-4300
(Please visit: [Insite IT Service Desk & Solution Center](#) for more information).

For your research workflow issues:

- 1) Ask a local research super-user first; your colleagues are your first best resource.
- 2) **Solutions Center** – to connect with someone immediately by telephone, call 1-877-311-4300 and follow the prompts to reach a live person and submit a Connect Care IT ticket:
 - Wait for the automated messages; if you do not have an AHS employee number, just wait on the line
 - Press '1' for Clinical Applications during the next automated message prompt
 - Then press '1' for Connect Care
 - and then press '1' again for Connect Care 'how to'

The staff on call at the Solution Centre will access their resources to answer your questions in real-time and submit a ticket with you on the line.

3) Submit an IT Ticket Online

- Complete the online form at <https://insite.albertahealthservices.ca/main/cc/SitePages/ConnectCareHelp.aspx>.
- Select 'Research' as the Issue Type
- Search for your own Connect Care Department name
- Select the patient care setting that applies to your situation (is it outpatient? Inpatient? Emergency department?)
- Add a title for your issue
- Lastly, enter an issue description, click 'submit' and you are done! You should see a ticket number on screen and receive a confirmation email to your AHS email address.

Note: If a Patient Safety Event has occurred (hazard up to harm), it is recommended that you submit a [Reporting and Learning System \(RLS\) report](#) and include your service desk ticket number in your report.

- **If your workflow or service-related issue relates to performing research care workflows in combination with pharmacy, lab or diagnostic imaging**, directly email or call your service area contact.
- **For assistance with study, study team member approvals and/or study set-up in Connect Care**, submit the appropriate form on the Health System Access (HSA) [website](#). For status updates on submitted requests to HSA, contact research.administration@ahs.ca.
- **For new users (people or sites who are not yet in system), questions related to research conversion, or site readiness for Connect Care Wave-specific launch**, or if your question does not meet any of the criteria above (and you are unable to find a local super user), we will answer your email through the cc.research@ahs.ca.



6. More resources for research end-users

Please remember to check your Research Coordinator - Learning Home and Research Coordinator – My Studies Dashboards for more training materials, tip-sheets and other documents that were developed to help you perform your Connect Care workflows. We also have some great material at our webpage at <https://extranet.ahsnet.ca/teams/AHSRA/SitePages/Home.aspx>

On behalf of the Connect Care research team cc.research@ahs.ca