Hello to our Wave 1 research community. We hope everyone is finding moments of beauty and peace amongst these challenging times. Please do not hesitate to reach out if you are having issues translating your Connect Care research workflows from one clinical space to another. Spring may be a bit delayed this week but it is right around the corner (true Canadian optimism😊)! Send any questions you may have in relation to the information below or if there are questions that have not been addressed to cc.research@ahs.ca

In This Update:

2. Research IT:
   a. Security Update: Research Coordinators role updated to view and pend SmartSets/Order Sets
   b. Security Update (planned/future): Research Coordinators role updated to enable documenting study medication administration on the MAR
3. Education:
   a. Is my study approved to order ECGs? Am I ordering ECGs correctly in-system? What are the expectations for ECG orders?
   b. Are you ordering research kits correctly?
   c. What resources should I review to be ready for documenting study medication administration on the MAR?
   d. How can I use and document the telephone and virtual health encounter type & Zoom virtual health toolkit?
4. Communications:
   a. Most recent Clinical Inquiry Newsletter
   b. Next Research Webinars
   c. Recent AHS releases and communications
   d. Have you missed an update? Previously Released Newsletters archive
5. Finding help for your questions and requesting on-site assistance
6. More resources for Research end-users


Due to the COVID-19 outbreak and social distancing policies, many of our researchers are now working remotely. The Health System Access (HSA) team has updated their Research IT Request page with instructions for research users requiring remote access to AHS systems such as Connect Care. Please be advised that due to the COVID-19
pandemic, AHS' IT resources are being prioritized to address clinically-related request. For researchers who are employed by the University of Alberta or the University of Calgary, please see below for other remote access options. Please also see the section further down in this newsletter on the use of telephone/virtual health visit types and the use of the Zoom platform for virtual visits.

Please continue to visit the Research IT Request page for the most up-to-date information as the directions shared above may change.
https://extranet.ahsnet.ca/teams/AHSRA/ITAccess/SitePages/CC%20Research%20Resources.aspx

Approved on March 18th, 2020, AHS has released guidance for researchers conducting and/or initiating clinical health research studies with AHS during the COVID-19 response. You can find the most up-to-date information during this rapidly evolving time at https://extranet.ahsnet.ca/teams/AHSRA/SitePages/Home.aspx. You can also find COVID-19 related FAQ directed to study sponsors released by Tom Baker Cancer Center (TBCC) and Cross Cancer Institute (CCI). If you have questions related to your study and the COVID-19 guidance, please direct your questions to research.administration@ahs.ca

You can find the most recent updates from AHS on the COVID-19 response on the AHS Insite homepage and through updates sent to your AHS inbox.

1. **Research IT:**
   a. **Security Update: SmartSets/Order Sets function accessibility for research coordinator role**
      **Issue:** Research coordinators unable to view or pend SmartSets / Order sets
      **Description:** A security update is required to revise what functionality/views the research coordinator role includes. This security update to the research coordinator role will allow them access to restricted and un-restricted smartsets/order sets and to pend orders from them.
      **Date of Fix:** This security update was applied to research end-users on March 31, 2020.
**Impact to Users:** All research coordinators now have access to the SmartSets/Order Sets function. It is recommended that users who have these complex order sets built as part of their research study familiarize themselves with how to queue up and pend these orders. Please see the relevant training document for more guidance. This security update will have no impact on users using exclusively preference lists or individual orders to queue up/pend research orders.

**Security Update (scheduled for update after April 21st): Research Coordinators role updated to enable documenting study medication administration on the MAR**

**Issue:** Research coordinators role does not currently give users access to document study medication administration on the MAR. This is resulting in incomplete documentation of med administration for research study participants.

**Description:** A security update is required to allow end-users with the research coordinator role access to document on the MAR.

**Date of Fix:** This security update has a tentative update date of April 21, 2020. Confirmation of the update will be provided in the next CC Research Wave 1 update release.

**Impact to Users:** All research coordinators will be expected to document their own medication administration for their research studies on the MAR. Until this access is released it is recommended that research end-users continue to ask clinical staff associated with the research study to perform the documentation in the MAR and/or document the administration in a research note. It is not expected that research end-users will be able to retroactively go back to previously held research encounters to document on the MAR. Please see the educational instructions in this document below to familiarize yourself and your team members on how to perform MAR documentation in advance of the security update.

### 3. Education:

**a. Is my study approved to order ECGs? Am I ordering ECGs correctly in-system? What are the expectations for ECG orders?**

If you are using any AHS ECGs resources (e.g. ECG machine or ECG reading services) to conduct study related activities, the first step that you and your study team must take is to ensure the ECG Operational Area for the respective AHS Department is included in your Operational Approval.

**For AHS ECG resources required in all Wave 1 sites, you must apply for Operational Approval for MAZANKOWSKI ALBERTA HEART INSTITUTE ECG LAB,** regardless if your study is being conducted at the MAZ or not. All ECGs read for the wave 1 sites are managed through the MAZ Alberta Heart Institute ECG Lab.

Please note this is **not applicable** if your study is using a third party ECG (non-AHS; e.g. sponsor provided).

There are a few considerations you must keep in mind when ordering ECGs in Connect Care:

1. Is the study using an AHS ECG machine or a Third Party?
   
   If AHS ECG - the ECG must be ordered in Connect Care.
If Third Party – the ECG must **not** be ordered in Connect Care, but the study team must document in the visit that a research ECG has been performed and the results. E.g. PI to add this information to the Progress Notes.

2. Does the study require an ECG appointment to be scheduled by AHS or is the ECG being done as part of a scheduled research visit?
   - If requires AHS to schedule ECG – order the ECG as “future” status and add the desired date. This will trigger the scheduling workflows.
   - If performed during a scheduled research visits – order the ECG as “normal” status, this will **not** trigger the scheduling workflows.
   - All ECG orders **must** be linked to the respective research study.

b. **Are you ordering research kits correctly?**

   We continue to receive reports about errors that are still occurring in orders for research kits.

   **In some cases, orders are being received but it is not clear that those orders are associated with a patient that is participating in a research study.**

   Please remember the triad of linkages that must be done to ensure workflows are complete: 1) Associate the patient to a research study, 2) Link the encounter (i.e. visit or admission) to the research study and, 3) Link each order with the research study.

   Depending on the scenario, it may be required for you to cancel and re-order a research-linked order, but it is important to consider the implications of cancelling the order. In general, the following guidance applies to cancelling orders in the system:
   - Don’t cancel/reorder the order if a downstream group or service is already using the order.
     - Don’t cancel an order while lab is processing the samples/order
     - Don’t cancel something that’s been scheduled, unless you speak with the appropriate unit to make sure the slot is held while you cancel/reorder
     - Don’t cancel if there’s a result. (It’s complete at that point, and we shouldn’t undo it.)

   **In other cases, orders for research kits are incomplete or incorrect.** Recall that one research kit must be ordered for each time point when sequenced samples are collected, or when different specimen types will be collected (i.e.) urine and blood.

   When ordering a research kit, please make sure you consider and complete these essentials:
   - Always provide the lab with the study customized paper lab requisition for research kits.
   - Affix both patient and research kit labels to the requisition when “clinic collect” labs are performed.
• Affix the patient label to the requisition when “lab collect” labs are performed.
• Always separate research specimens from SOC when taking samples to the lab touchdown space. DO NOT PACKAGE THEM TOGETHER.

Please remember to select the correct options for ‘clinic collect’. During the patient appointment, make sure you complete the collection workflow in system, and print the patient label and research kit label for the paper requisition:

Please remember to select the correct options for ‘lab collect’ and print the patient label for the paper requisition. Recall that this workflow also applies when patients are doing a specimen collection at home (i.e.) urine; and bringing that sample to the lab for processing or shipping:

**c. What resources should I review to be ready for documenting study medication administration on the MAR?**

On or after April 21st, the research coordinator security role will be updated to enable research coordinators to document medication administration on the MAR. In order to refresh your training on performing this task, please review the relevant guide below for your clinical area.

Outpatient Guide – Ambulatory Medications & Orders (page 11)
Inpatient Guide – Medication Administration
d. How can I use and document the telephone and virtual health encounter type & Zoom virtual health toolkit?

Virtual Health and Telephone Visits – using the new visit types (page 8, Clinician Check In – Clerical Follow Up Guide)

- Some departments have had these visit types since Connect Care launch. If you have been using them, please continue with your normal business practice
- Virtual Health and Telephone visits are meant to replace face to face appointments with providers
- Travel screening questionnaires and BPAs will not be triggered when checking in these types of appointments
- Existing face to face appointments should be changed to virtual health or telephone when instructed by the provider
- Where possible, scheduled encounters are preferred to ad-hoc encounters, for patient/provider convenience, for resource allocation, and for ensuring that critical/related information (e.g. referrals and other documents) remains linked to the encounter

Telephone Visit: Schedule this visit type when the provider will speak to the patient on the phone (audio only – no eyes on the patient). Vax sites must cancel the existing appointment and schedule a new appointment using the Telephone visit type. Use “Pandemic Response” as the cancel reason and enter COVID-19 in the free text comment. The link between the original appointment and the clinical documentation may be broken, but the documentation is not lost and can still be seen in the patient’s chart. Non-VAX sites can use Change Appt functionality to change the visit type to Telephone. Use “Pandemic Response” as the change reason and enter COVID-19 in the free text comment.

Virtual Health Visit: Use this visit type when the provider will connect with the patient using video technology such as Zoom (both audio and video – eyes on the patient). Use Change appointment functionality to change the visit type to Virtual Health. Use “Pandemic Response” as the change reason and enter COVID-19 in the free text comment.

Zoom Virtual Health Toolkit – The Zoom tool is available to clinical health researchers with studies approved as part of Connect Care but does require access to the appropriate devices, hardware and software requirements (see the ‘Request remote access’ section of this newsletter to find out how to meet these requirements). AHS Virtual Health, enables clinicians to deliver health services, expertise and information in real time over distance, improving access and eliminating barriers to patient care across Alberta and beyond. Our goal is to support quality virtual care - anytime, anywhere. AHS has entered an Enterprise agreement with Zoom. Zoom software allows providers flexibility to
connect with patients virtually, such as in the home, **on any device that meets minimum hardware and software requirements.** The AHS-Zoom account ensures health grade encryption and security. This support kit combines resources from AHS Virtual Health, Connect Care, and Zoom. As information evolves, this kit will be updated.

4. **Communications:**

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

   b. **Next Research Webinars**
      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
      Upcoming session dates: (third Monday, of each month)
      Apr.20 12:00-1:00
      May 19 12:00-1:00
      Our February 18, 2020 webinar featured an overview of Reporting tools in Connect Care. You can find links to previously recorded webinars, [here](#) under the heading ‘Presentations and Videos’. 

   c. **COVID-19 Registration/Scheduling Travel Screening and Auto-Appointment Reminder Calls**
      Effective immediately, the Connect Care auto-appointment reminder calls have been changed to include the below messaging around COVID-19.
      “In the last 14 days, if you have travelled anywhere outside of Canada and are feeling unwell with fever, and/or cough, shortness of breath, or have been in close contact with a person who has travelled and is unwell, or have been in close contact with a confirmed or probable case of COVID-19, please call the clinic for a health assessment over the phone, before coming in for your appointment.”
      Also travel screening for COVID-19 will be incorporated into the Connect Care workflows for registration, scheduling and appointment check-in starting Wednesday, March 18, 2020 (anticipated date for implementation).
      Please see the attached Memo - Connect Care Reminder Calls and Travel Screening - for the full details.

   d. **Have you missed an update? Previously Released Newsletters archive**
      We have an archive of previous Wave 1 Connect Care Research updates at [https://extranet.ahsnet.ca/teams/AHSRA/SitePages/Home.aspx](https://extranet.ahsnet.ca/teams/AHSRA/SitePages/Home.aspx) under ‘Newsletters’
      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 AHS Health System Access Resource Page in a section called ‘Connect Care Resources’)

5. Finding help for your questions and requesting on-site assistance *NEW comprehensive list of supports*

  • Ask a local research super-user first, your colleagues are your first best resource.

For urgent issues (including log-in issues) or technology related issues with patient impacts, call 1-877-311-4300. If a Patient Safety Event has occurred (hazard up to harm), it is recommended that you submit an RLS (include your service desk ticket number in your RLS report).

I Can't Log-In, My Password Doesn’t Work, or I'm Having an Issue with a Device. In line with security policies established by Alberta Health Services, password resets can only be completed over the phone. You may also contact the service desk if you are experiencing issues with your computer, printer, other non-medical devices, or you are a clinician who requires Solution Centre support. Call the IT Service Desk & Solution Centre immediately at 1-877-311-4300.

For non-urgent research-specific system issues, submit a Connect Care IT ticket (https://insite.albertahealthservices.ca/Main/cc/SitePages/ConnectCareHelp.aspx). Under ‘Clinical Area’, select ‘Research’. Under ‘Connect Care Department Name’ enter EDM STO, WMC PED CIU or EDM UAH, WMC CIU. We are in the process of populating all department names here. Things you might want to submit a ticket include;

  • A functionality or report in the Connect Care research module is not working as expected
  • A workflow that you are trying to perform in-system support of research is interrupted, delayed or does not transmit
  • You are requesting access, functions or reports that are not currently available to the research coordinator role, etc....
  • There is an issue related to how information is tracked, entered, transmitted or reported in a research visit

For assistance with study and study team member approvals and or study set-up in Connect Care. Please submit the appropriate form on the Health System Access (HSA) website (https://extranet.ahsnet.ca/teams/AHSRA/ITAccess/SitePages/CC%20Research%20Resources.aspx) for Connect Care requests related to:

• Adding your study to Connect Care
• Updating Connect Care study records (add/remove research staff, notification preferences, study description, etc.)
• Requesting Connect Care training

For status updates on submitted requests to HSA, contact research.administration@ahs.ca.
If your workflow or service-related issue relates to performing research care workflows in combination with pharmacy, lab or diagnostic imaging, please directly email or call your service area contact. These service areas are best able to speak to resolution of issues.

For 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.

Wave 1 Onsite Assistance. We are suspending on-site visits temporarily to limit visits to clinical centers. Please reach out to cc.research@ahs.ca and we will provide virtual support as needed.

6. More resources for Research end-users
   Please remember to check your Research Coordinator - Learning Home & 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 AHS/HSA Webpage. https://extranet.ahsnet.ca/teams/AHSRA/SitePages/Home.aspx