January 8th, 2020

Connect Care Research Wave 1 Update

Welcome back everyone and Happy 2020. We have only been back for a few days but we are busy at it, meeting with many of you at the Post Launch Visit events and hearing from you directly on what is working and what could use improvement. Thank you to all who participated and if you did not get a chance to participate, you can always submit your feedback to cc.research@ahs.ca and we will add it to the other recommendations. There are lots of tips and education pieces in the newsletter this week so we hope you have the chance to review them with your teams. You can always submit ideas for other education bits for future newsletters.

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1. **Education**: Required fields to fill out when ordering medications from pharmacy in an orders only encounter

If you are ordering a study medication from pharmacy as an Orders Only Encounter in advance of the patient visit, you must add the Expected Date and Time under the frequency field as part of the order. This allows pharmacy to pull up all the upcoming medications and prepare in advance of the visit.

**NOTE**: The ordering of the medication in-system does not replace the need to submit the dispensing sheet containing the IVRS information and any other relevant instructions for pharmacy.
2. **Education: Ordering of Clinically Administered Medications (CAM) in an Orders Only Encounter**

When a medication (investigational or Health Canada approved) will be administered by AHS clinical staff, the drug administration must be recorded in Connect Care through the drug administration in-system workflow. In order for the medication to be properly routed to the Pharmacy and the AHS clinical staff to be able to perform this workflow, the medication must be ordered as a CAM if in an outpatient setting (syringe icon) or as a During the Visit Med if in an inpatient setting (bed icon).

Currently, CAM orders placed/signed through an “Orders Only” Encounter are not being properly routed to AHS Research Pharmacy.

Our team is discussing with the appropriate teams to determine the correct in-system workflow to allow for proper routing and we will share with our users once we know the answer. In the meantime, please continue to order the medication as a CAM (if they will be administered by and AHS clinical staff) and faxing/emailing the “Drug Dispensing Sheet” the same way you did prior to Connect Care.

**What if I need AHS Research Pharmacy to prepare my study medication but the administration of the drug is not done by an AHS clinical staff?**

Please order the “Home (after the visit)” med (House Icon) in Connect Care and fax/email the “Drug Dispensing Sheet” to AHS Research Pharmacy the same way you did prior to Connect Care.

3. **Education: Research Kit Lab requisition and required labeling**

Following the ordering of research kits in Connect Care, research teams are also required to provide the paper requisition that will serve as an instruction sheet to ensure the proper processing/handling/shipping of the research kit. When providing the paper requisition to Lab, the below steps must be taken.

**Clinic collected lab/specimens**: All research kit paper requisitions sent to lab must contain two labels (barcodes) printed from Connect Care. The first one is the patient label containing the patient identifiers and the second is the research kit label (printed when performing the specimen collection workflow). Research Kits without the appropriate labels will not allow lab to receive them according to their workflow and will cause further downstream issues. Additional workarounds from both the research team and lab team will be required, including a manual requisition entry, and order cancellation by the researcher/PI of the original order.

The **patient label** should be affixed to the top of the requisition where the patient information goes.

The **research kit label** should be placed in the top right corner of the requisition.

**Lab collected lab/specimens**: All research kit paper requisitions must contain the patient label printed from Connect Care. In this case the collection is done by Lab and therefore lab will print and affix the research kit label once the specimen collection in-system workflow is completed.
4. **Education: Applying for in-system Study Monitor Access**

The EpicCare Link portal is now open for external study monitors to access Connect Care. Research teams who have a research study in Connect Care need to submit the IT request for the monitor using this form: [http://bit.ly/1NTJabj](http://bit.ly/1NTJabj) **at least one week** before the monitor’s visit date. The Monitor will get an email advising them about their training and other requirements. When their access is in place, the research study coordinator with read/write access to the research study in Connect Care will need to link the patients for them to access. The workflow for monitors to assign monitors access is described on Page 8 of the Manage Research Study Patients guide: [https://insite.albertahealthservices.ca/Main/assets/cistr/tms-cis-tr-research-staff-manage-research-study-patients.pdf](https://insite.albertahealthservices.ca/Main/assets/cistr/tms-cis-tr-research-staff-manage-research-study-patients.pdf)

5. **Education: Research Workflows Post-launch Walk through [Webinar]**

The AHS Connect Care Support Team for Research presented a webinar on November 28th, 2019, covering some key research workflows and information learned since launch. This webinar reviews some real life examples providing a step-by-step screenshot on how to perform these workflows. The workflow examples were selected based on the questions received from our research users since wave 1 launch. A recording of the webinar has been made available to our users and it can be accessed from your Research Coordinator – My Studies Dashboard under “Research Links”. See image below.

6. **Workflow: Closing ‘Research-only visits’ & the visit diagnosis form**

In the last few weeks, role revisions now allow Research Coordinators to close research-only visits and to assign a diagnosis when prompted. We recommend entering “patient in clinical research study” as the diagnosis as it is not typically the role of clinical research coordinators to assign diagnosis and entry of information to this field will flow through to various registries and reports.

7. **Reporting: Charge review report filters**

We have heard from many of you that it appears as if there are no charges in your charge review report. We have identified the issue and Research IT is working hard to resolve it. Please see the instructions our credentialed trainer Nicole has put together below to manually correct the report while we work on the fix.

1. Open the “Total Balance Needing Research Review” report from the Research Coordinator – My Studies dashboard
2. Staying in the Details tab (do not click on the Study Summary tab), click on “Filters” (located on the top left side below the name of the report).

3. Click “Clear All” on the bottom left of the Filters screen, then click “Apply”. This should clear all of the pre-applied filters in this report and show you any patients that require billing review.

These steps will be required going forward to complete billing review when you have a total balance on your dashboard again. Once you see patients in this report, follow the steps outlined in the Review Research Charges quick start guide.

8. Upcoming Training Dates for Research Staff

Do you have new staff joining your team? Do you have a study coming up that will require read/write access to Connect Care. Keep your eyes open for the next available training dates for the Research module. Training sessions are held each month according to demand.

The next available date for research-related training is February 7th: Research Staff
Note, access to the “Basic Reporting User” course for research purposes is approved on a study-by-study basis with the Health System Access team (contact: research.administration@ahs.ca)

9. Reaching Out: Site Visits Ongoing

Thank you so very much to all the teams that have been so very patient and accommodating as we come visit to assess identified issues. Research IT is doing their very best to catalogue, triage, identify and implement solutions. In the past few weeks we have visited or held focused information gathering virtual sessions with:

- Cross Cancer Institute Lab
- Research and Walter Mackenzie pharmacies
- ABACUS research team
- Pediatric Clinical Investigations Unit
- Adult Clinical Investigations Unit
- Pediatric Emergency Research Team
- Adult Emergency and Stroke Research Team
- Research Billing and Finance Team

We always welcome your feedback and we will continue to work with you in the new year as we iron out some of the wrinkles.

10. Super User Smock Returns

The Connect Care Program Coordination Team is trying to collect the yellow Super User smocks and, if used, clean them to be re-used. In order to have them cleaned and returned, these are the steps to follow:

1. Once you have counted them, please take the smocks to the UAH Linen room (0H4.02) located in 0 level of UAH.
2. Please leave Marlene Velasco’s information with the linen room attendant so that she can be contacted when the smocks are clean:
   a. Name: Marlene Velasco
   b. Phone: 780-306-2719
   c. Email: ConnectCare.ProgramCoordination@albertahealthservices.ca
3. The linen room attendant will re-count & verify your count and the smocks will be placed in soiled linen nylon bags so that we can differentiate them from regular soiled linen.

11. Log-in and Password reset help?

AHS has a downloadable poster that you can print to help staff know where and when to get support for clinical and technical issues like password resets.

For login & password issues, call the IT Service Desk & Solution Centre at 1-877-311-4300. Press 1 for Clinical Applications and follow the instructions to Connect Care.

If you have a workflow question for a super-user and you do not have access to a super-user in your area, you can access one through asking your question at cc.research@ahs.ca.
12. Finding help for your questions

- Ask a local research super-user, your colleagues are your first best resource
- We will be discontinuing Virtual office hours as well as discontinuing the use of the cc.research@ahs.ca inbox to support end user questions. The inbox will continue to be used to support launch activities for subsequent Wave 2-9 sites.
- Submit your system and training questions to the ‘research’ desk at https://insite.albertahealthservices.ca/ccsupport
- Need even more help? Leanne Blahut will be onsite at the Kaye Edmonton Clinic KEC 0E.127 every Wednesday (starting again on January 8th) from 0800-1130hrs. If needed, at your request, she may be able to visit your site to help out. You can request her help in advance at cc.research@ahs.ca. She will not be at the site on December 25th and January 1st.

13. More resources for 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