July 24th 2020

Connect Care Research Wave 1 Update

Hello! We hope everyone remains happy and healthy out there!

Do you know that you can request access for a study in Connect Care that is either observational or interventional? While interventional clinical drug trials may be top-of-mind for many research teams in a clinical care setting, other interventional studies – such as new device or novel procedure investigations – also qualify. Further, research teams working on observational trials with patients can also benefit from their studies being live in-system to schedule, track and document patient visits, and have a readily available place for research notes associated with the patient record. Think about all of the possible scenarios where you and your team can benefit from the CIS with your study. When you do apply for Connect Care access, be sure to inform your HSA advisor of all of your AHS resource needs in the operational approval request - including physical space to see patients for research purposes. All of these details are important and will ensure that you have all of the pieces you need to manage your study effectively and be aware of what is available to you by way of operational supports. Your HSA advisor and your Connect Care research support team will be happy to talk through this with you!

Remember, many resources exist on both your Research Coordinator dashboard AND your Learning Home dashboard including step by step outlines of how to associate patients and orders to research, your requirements for charting patient participation, and additional resources guides for outpatient and inpatient care workflows. If you cannot track down your local super user, and the issue is not technical in nature (make sure to send in tickets to IT for those!) please know you can reach out to cc.research@ahs.ca and we will match you with the help you need.

New COVID information:

New COVID Group on the Safe Discharge Checklist

- To ensure all necessary tasks are completed before discharging a patient with COVID-19, a new group has been added to the Safe Discharge Checklist Flowsheet.

Reconciliation Navigator

- A new navigator is available to assist with post-downtime documentation reconciliation in Connect Care. The navigator is found under the ‘More’ activity. It allows users to document important changes that occurred during downtime.
In This Update:

1. **Research IT:**
   a. System Update: MAR workflow revisions for orders-only (read only) and in-visit (acting on orders and documentation)
   b. Reminder: Link your encounters to Research!

2. **Education:**
   a. ECG Workflow Update – how do I order an ECG for research?
      i. Order ECG for Research during Clinic Visit
      ii. Order Multiple ECGs for Research during Clinic Visit
      iii. Release Multiple ECG order
   b. Order Inquiry – Alternative Workflow (If originally using Labs by Treatment Plan or Labs by Type view in Order Inquiry)
   c. INV medication revision and corrections Workflow
   d. CC’d chart functionality from both OP & IP context

3. **Training**
   a. Research Staff ILT Course – Virtual Training
   b. Next training date
   c. Thrive Training Modules
   d. Reporting Courses – Virtual Training

4. **Communications:**
   a. Connect Care post-launch survey (wave 1 end users)
   b. Most recent Clinical Inquiry Newsletter (link)
   c. Next Research Webinars
   d. Have you missed an update? Previously Released Newsletters archive

5. **HIM Information**
6. **Finding help for your questions and requesting on-site assistance**
7. **More resources for Research end-users**

1. **Research IT:**
   a. **System Update:** MAR workflow revisions for orders-only (read only) and in-visit (acting on orders and documentation)
   **Issue:** MAR security change finished
   **Description:** When the original change of security for the MAR access for research coordinators was implemented, it was tested and validated. Unknown, missing elements were identified and fixed to grant full MAR access and the ability to pull in Orders Only encounters authorized inpatient INV drugs to be documented in the MAR.
   **Date of Fix:** Mid May, 2020
   **Impact to Users:** Research Coordinators now have full access to make updates to the MAR within their scope of practice.
b. Remember to link your encounters to research, including unscheduled encounters such as Orders Only or Telephone

**Description:** Encounter association (also known as encounter linking or encounter flagging) is only done for patients who are active in a study. This is important because associating any encounters that are partially or fully study-related to research tells the system which visits are for which purpose.

- Study staff and clinical providers can more easily identify research-related encounters in Chart Review.
- "Mixed" (study and non-study) visits can be handled within one encounter.
- Billing can be accurately managed.

---

2. Education:

   a. **ECG Workflow Update – how to I order an ECG for research?**

   **Research Ordering ECGs in Clinic**

   This document is available via Learning Home Dashboard and Insite. It covers the following topics:
   - ECG Workflow
   - Order ECG for Research during Clinic Visit
   - Order Multiple ECGs for Research during Clinic Visit
   - Release Multiple ECG Orders
   - How to Use integrated Cart to Complete Order
     - ED Nurse- ECG Workflows - GE MACVU360
     - ED Nurse - ECG Workflow – Phillips
     - ED Nurse - ECG Workflow - GE-MAC5500
   - Reprint ECG Requisition

   i. **Order ECG for Research during Clinic Visit**

   These steps can be used to order ECGs for upcoming visits; **maximum 14 days in advance**. (After 14 days, the order will disappear from the third party system and will not be available on the cart)

   1. Search for an ECG order
   2. Make sure to select **After Visit** order.
   3. Select as the **Normal** Status.
   4. Select **Clinic Performed** or **Ancillary Performed** (lab performed).
5. Select **Edmonton (Connect Care)**.

   Do not select **Other/External (Req to Print)**. This option will NOT send the order to the third party system and it will NOT be available on the cart. If you need to print a paper requisition, steps are detailed in the tip sheet and is available via Learning Home Dashboard and Insite.

6. Click **Accept**.

7. **Pend** orders for PI to sign.

8. Once orders are signed, it will be available immediately on the ECG cart within the ordering department.

   **ii. Order Multiple ECGs for Research during Clinic Visit**
   1. Search for an ECG order
   2. Make sure to select **After Visit** order.
   3. Select as the **Standing** Status.
   5. Enter number of ECGs that need to be performed.
   6. Select **Clinic Performed** or **Ancillary Performed** (lab performed).
   7. Select **Edmonton (Connect Care)**.

   Do not select **Other/External (Req to Print)**. This option will NOT send the order to the third party system and it will NOT be available on the cart. If you need to print a paper requisition, steps are detailed in the tip sheet and is available via Learning Home Dashboard and Insite.

8. **Add Comments** as needed.

9. Click **Accept**.
iii. **Release Multiple ECG Order**
1. Click **Order Review**
2. Click ECG order.
3. Click **Release**. The order will become available on any cart in the ordering department.
4. Click **Release** again to send additional ECG orders to the cart.

b. **Order Inquiry Alternative Workflow**
Recent changes to the order inquiry activity might be affecting your workflow. Some labs might not be accessible via the **Labs by Treatment Plan** or **Labs by Type** views in Order Inquiry. If this is happening to you, there is an alternative workflow. The [tip sheet](#) is available via your LHD and Insite.

**If you cannot find your lab orders, try the following:**
1. In Order Inquiry change your view to **Lab Orders for Today**. Collect the labs using your normal workflow.
If there is no view for Lab Orders for Today in Order Inquiry follow these steps:

1. Go to nurse side bar and search for Visit Orders. This option may not be available based on your template. If you do not have a sidebar option and cannot access your orders, please put in a ticket.

2. Orders for collection will show in side bar

3. Click print label to take you to the collection window

4. Complete the collection as per your normal workflow
Note – If your patient has both inpatient and outpatient lab orders, these orders will show in separate collection windows. Check to see if all of your blood work is captured in the collection window. If not, go back to visit orders to click on the labs that have not been collected to print the labels to complete the collection.

c. INV medication revision and corrections Workflow
To make any changes to or delete an existing INV Medication Record in Connect Care, please open an IT Ticket (vFire ticket) to the AHS Pharmacy team at https://insite.albertahealthservices.ca/cis/Page23730.aspx.

Please follow the steps below when opening the IT ticket.

- Select the option “I Have an Issue Related to How Connect Care Supports My Documentation, Orders, Decisions or Practice Improvement”
- Enter your personal information including the best number to reach you at;
- Select the Clinical Area as “Pharmacy”
- Select the Patient Context as “Any”.
- Select the Connect Care Department Name as the AHS Pharmacy closest to the AHS department where you see your research patients;
- Under issue, enter “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
- If possible, include screenshots of the problems encountered – To do so you will need to login to your IT Helpdesk Portal by going to the AHS Insite > Teams > Information Technology > IT Customer Service Portal
  - Please note that in the IT Customer Service Portal you are able review, update and add attachments to any of the tickets that have been opened by you.
- 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.

d. CC’d chart functionality from both outpatient & inpatient contexts
Once you place your research orders in either an outpatient or inpatient context, and need them signed by an authorized provider, you will need to follow the steps to cc the patient chart to the physician.

- Open the patient encounter of interest (current admission or outpatient encounter); make sure you link your encounter to the appropriate research study
- Click ‘Add Order’ (for outpatient) or ‘New Order’ (for inpatient) to search and select your orderable
- Click ‘Accept’ once you have entered and confirmed all the order details
- Link your order to the appropriate research study
- Click ‘Pend Orders’
- From the Visit Navigator tab, select ‘Send Chart’ from the menu on the left side of the navigator window
  - Select the ‘CC’d Charts’ button
  - Enter the Recipient (physician) name
  - Add a note (i.e. ‘Please sign research orders’)
  - Select ‘Send on Closing Section’ from the drop-down on the bottom of the window
  - Click ‘Close’

3. Training
   a. Research Staff ILT Course – Virtual Training
      The Research Staff course will be provided virtually through the AHS Zoom platform 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 are working with users to ensure this access before training dates. Of note, the prerequisite course for Research Staff ILT, Ambulatory Nurse Shared will continue to be provided as an in-classroom training.

   b. Next training date
      i. August 11-12, 2020, 8am – 12pm (spots available)
c. **Thrive Training Modules**

Thrive eLearning modules are now available on [MyLearningLink](#). These modules are not research-specific but are available for all Connect Care users. To access these modules, search for ‘Thrive’ in the Courses & Registration section of MyLearningLink.


d. **Reporting Courses – Virtual Training**

Reporting training is now available to all Connect Care users through self-registration on MyLearningLink, more information is available on [Insite](#). Both courses below are offered virtually. In-system reporting questions, comments or concerns can be directed to ConnectCare.ReportingSupport@ahs.ca.

i. **Basic Reporting User:** all research end-users who have taken the Research Staff ILT course are encouraged to take this virtual learning course at it explores how to pull and customize reports introduced in the Research Staff course. This course is a prerequisite for the Reporting Power User course.

ii. **Reporting Power User:** this course builds upon basic reporting knowledge. You learn more advanced in-system reporting skills such as modifying parameters and display columns, using custom logic, building summaries, personalizing and customizing dashboards, and formatting report results.

4. **Communications:**

a. **Connect Care post-launch survey (wave 1 end users)**

Post-launch surveys are checkpoints to help support the long-term success of end users and project teams. Information gathered from survey responses helps facilitate the identification of possible inefficiencies, work arounds, and key pain points for staff working in Connect Care.

Your survey response is crucial for the Connect Care project team so we can support your best experience working in Connect Care, and so we can take what you have learned to future waves.

The survey is live in Connect Care and will be available until August 7.

You can access the survey by clicking [HERE](#).

b. **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.

c. **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

- The next Connect Care Research Webinar is scheduled for Monday August 17th at 12pm with the topic to be determined.

You can find links to previously recorded webinars, on the [Provincial Health System Access webpage](#) under the heading ‘Presentations and Videos’.
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 under ‘Newsletters’

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

- Connect Care Bytes Blog
- Connect Care Readiness Playbook

- All research stakeholders (including non-AHS employees) can access an assortment of Connect Care research related information at: Provincial Health System Access
  (The right-hand side of the AHS Health System Access Resource Page in a section called ‘Connect Care Resources’)

5. HIM Information
If you have questions about scanning and uploading documents into Connect Care, please see below:

  o Email ECS@ahs.ca for any Document Type questions and a response will be received within 2 business days.

Visit the HIM Service Portal to request services and support for Health Information Management

6. 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 were 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.

7. 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

Best to all,

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

Leanne M. Blahut, MSc, PMP
Project Manager | Health Evidence & Innovation | Provincial Clinical Excellence | Alberta Health Services
leanne.blahut@ahs.ca