

Connect Care Launch 4 Research Conversion

What to Expect and How to Sign Up



March, 2022

Agenda

- **Overview of Research Conversion parts 1 & 2**
- **Review of the logistics regarding signing up for research conversion classroom**
- **Logging in to Hyperspace**

Research Conversion Part 1:

Verify Studies

Enroll Patients

What you will do:

- **Follow your Research Conversion Guides**
- Verify that your study info is accurate
- Enroll all active research patients for Launch 4 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, 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	<i>Required if over 100 patients</i>	<i>Required if fewer than 100 patients</i>	<i>Required if fewer than 100 patients</i>	Required	<i>Optional</i>	<i>Optional</i>
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 Hospital	Pro000012	123456789	ULI	Mouse, Mickey	25/01/1955	Enrolled		
Sample Study	University of Alberta Hospital	Pro000012	456789123	ULI	Duck, Donald	14/02/1965	On Follow-Up		

Step 1 – finding your List of Studies (using My Studies Report)

What you need to check

- **Verify all your studies are showing up on your “My Studies” report**
- **Confirm there are no duplicates and only the lead (home) site is set up.**
Duplicated sites may need to be deleted.
- **Identify any studies that should be closed and notify the HSA**
- **Confirm the studies are properly marked as Interventional OR observational**

Step 2 – Complete your study set-up using the Study Maintenance Activity

Sections you will review

- General Information
- Users and Providers
- Studies Activity Setup
- Study Calendar
- Automated Actions
- Billing set up
- Contraindicated Medications

What you need to check ...

General Information section

- Study Name
- Description
- Ethics ID
- Update the Approval and expiration date
- Update the study status *(It must be updated from 'Project in Set Up' to the most appropriate status)*

Users and Providers section

- Verify the correct study personnel is listed in the correct field. *Any changes will need to be requested to HSA. Please let us know.*

Studies Activity Setup

- **Select the appropriate Adverse Events Term set**

Study Calendar

- **Add study branches (if applicable)**
- **Hematology or Oncology research studies**
 - ✓ Ensure the correct Beacon Protocol (if applicable) has been linked to your research study

Automated Actions

- **Verify the required automated actions for your studies are properly set up. All studies come with the ADT and App't Notification defaults.**
Any change requests will need to be submitted to HSA.

Contraindicated Medications

- **Select (as applicable) the study-specific medication grouper containing all medications that are considered contraindicated for your study (as per the study protocol)**

OPTIONAL functionality

- *A study-specific medication grouper should have been built to your study, if you requested the build.*
- *Each new grouper allows you to set up both specific drugs and/or drug classes*
- *If you need a medication grouper built for your study, please submit a ticket using the instructions in the [Research Study Medication Grouper Tip Sheet](#) which can be found on the Research Coordinator Learning Home Dashboard.*

Step 3 - Patient Associations

What you need to check for studies with active enrollments

- **Find your patients and associate your patients to their respective research studies adding the following:**
 - ✓ Status
 - ✓ Consent Date
- **Review all your patients have been properly linked and have their ‘start date’**
 1. Go to your Research Coordinator dashboard and run the report: ‘Patient Associations on My Studies’
 2. Verify all your patients have been properly linked to their studies and have the correct ‘start date’ and ‘status’ entered.

Conversion Part 2:

Link Encounters

Document Investigational Meds

Personal Settings

March, 2022

What you will do:

- **Follow your Research Conversion Guides**
- Link future research encounters to the right study now that existing appointments have been loaded into Connect Care
- Add investigational medications (INV meds) to patient charts, as needed, if patients are taking them at home
- Create preference lists to make workflows easier at launch
- Set up personalized reports, as needed, beginning with 'My Studies Report' from Part 1



Preparing for Part 2: What to Have Available

- A list of the future, study-related visits
 - At which clinic department will the patient be seen?
 - Who are the Providers the patient will see during these visits? Does this include you?
- A list of medications details (INV or SOC) for your research studies
 - Who are the patients who are currently on study-related self-administered medications that they continue to take at home?
 - What are these medications?
- 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 – context matters
 - You will use this to create preference lists for yourself and your study team

Step 1 – Information about Booking Research-related Patient Appointments

What you need to check to make sure your study appointments are in system

- **Connect Care Research recommends that research-related visits taking place in AHS clinical spaces, as with all other visit types, be scheduled by the scheduling staff of those AHS clinical spaces for the most consistent patient experience**
- **Clinical department setup includes adding Visit Types to the department**
 - A 'Research Only' visit type is part of the standard build for specialty departments where your patients will be seen in an AHS clinical setting
 - The 'Research Only' visit means that everything in that encounter pertains to a research study

- **You need to know who is booking your study appointments**
 - Appointments may be booked by AHS scheduling staff **or** by Research Study Team members
 - If clinical/operations areas staff are unable to schedule and enter research appointments into the regular clinical service area schedule, the service manager must permit the delegate(s) of any affected research team to support their own in-system scheduling and patient care in that department for research
 - Know which AHS clinical areas where your research patients are being seen, and ask your PI to confirm which approach applies to you and your study team
- **Research study team members require additional Schegistrar training before they will receive scheduling permissions in system**

Step 2 - Linking Appointments & Admissions

What you need to check if study participants have research appointments within 2 weeks post-launch

- **You will use a report called ‘Upcoming Appts for Patients Associated with (specify your study)’**
 - Review upcoming visits for your study participants
 - Verify that all post-launch appointments were entered into Connect Care during appointment conversion (i.e. from SCM or VAX)
 - Verify research study-related visits scheduled for go-live and beyond are correctly associated with your study
- **Make sure to link DI appointments for research which are converted by the DI service team prior to the research conversion classroom**
- **Check your profile to confirm you have been set up with a provider record *if you are the person who will be booked to see a patient***
- **Similar workflow for the ‘Upcoming/Current Admissions for Patients Associated with Your Study’**

Step 3 - Investigational Medication Association

What you will need to check if any of your studies involve an investigational med and/or if any of your patients are taking it at home

All medication orders, including investigational medications, go through the system

- **Add investigational medications to the patient chart**
- **Validate the INV build, that it is accurate and reflects either ‘study dispensed’ or ‘pharmacy dispensed’**

Step 4 - Research Coordinator User Settings

Dashboard options and other Personalization

- **Many resources and links are available to you on your Research Coordinator Learning Home Dashboard and you can toggle between them, or choose another default option**



The opportunity to make your hyperspace work for you

- **Uncover hidden icons or options available and discover more than one way to get where you need to go**
- **Learn to search for 'MySmart Phrases' or set up your own to help save keystrokes**
- **Create Preference lists of your own to share and search for others that are useful for you**

Coming Up: Research Workflow Walkthrough

Will be scheduled one week prior to launch - why you should attend:

- **Understand research workflows**
- **Understand lab ordering**
 - IP vs OP context
 - Lab collect vs clinic collect
 - Research kits
 - Pending and signing orders
 - Ccing the chart to provider
 - Learn to print labels
- **Learn about navigation**



When & Where: Times and Location

Dates & Times for Research Conversion

Virtual Classroom Sessions:

- WHEN: 10 days over two weeks
 - May 9/22 to May 14/22
 - May 16/22 to May 20/22
- TIME: Every session is 2 hours in length
 - 0830h to 1030h
- Maximum of 15 attendees per session
- Virtual office support 30 min after each session in the afternoon

Location: **Zoom** information provided in your session confirmation email



Preparation: How to Register for Conversion

What you will need to do:

- 1) Ensure at least ONE team member signs up for a virtual conversion classroom session to complete conversion activities for your studies
 - All study team members will receive an email from the Connect Care Support Team for Research with a link to the conversion classroom schedule where you may select ONE timeslot
 - Self-select your team's conversion delegate(s) to sign up to the classroom
 - The Connect Care Support Team for Research will send your team delegate(s) an email confirming the date and time for your session with Zoom details after they select a timeslot
 - 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 during your virtual classroom session**



Preparation: How to Register for Conversion

What you will need to do:

- 2) All team members must complete the self-directed Research Conversion e-learning on MLL
 - Your team delegate(s) must complete the e-learning prior to the virtual conversion classroom session date they selected
 - All other team members should complete the e-learning regardless of participation in the conversion classroom session – the e-learning teaches you what to do so you can complete these activities with new studies in the future, and to complete the conversion work if there are multiple studies your team must activate in Connect Care for launch 4



Preparation: How to Register for Conversion

What you will need to do:

- 3) **Have a back-up plan in case your delegate is unable to attend the virtual conversion classroom**
 - The COVID pandemic has impacted work for everyone; it is recommended that your team discuss who may substitute for your delegate if they are unexpectedly unable to attend the virtual conversion classroom date they selected
 - There are many new research end users who will acquire Connect Care access for launch 4 and rescheduling the conversion classroom sessions is not an option due to the number of other potentially impacted participating users



Preparation: How to Register for Conversion

What you will need to do:

4) Test your Connect Care login

- After you complete your research ILT training, test your login to the PRD environment well in advance of your virtual conversion classroom session – once you are trained, you login should be ‘live’ in system
 - Enter your AHS Network username and password
 - Open Citrix
 - Click on Applications → Folders → Connect Care
 - You should see the icon labelled
 - If you don't see the “PRD” icon please let us know
 - **Do not** log into the training environments such as ‘ACE’



Testing your login



- Enter your AHS Network username and password
- Select the role that you are attending training for (Referrals Coordinator)
- Select your department. The department naming convention consists of:
<City><Site><Department>

Department Naming – How to find yours

System Department Naming Formula:

- Large Acute Care Facilities (Multi Building)
 - [City Abbreviation] + [Campus/Hospital Abbreviation] + [Building Abbreviation] + [Specialty/Clinic Name]
 - Example - [EDM] + [WMC] + [KEC] + Diabetes
- Single Hospital Facility/Location (Single Building)
 - [City Abbreviation] + [Hospital/Location Abbreviation] + [Specialty/Clinic Name]
 - Example - [CGY] + [FMC] + Emergency
- Program Specific Naming
 - [City Abbreviation] + [Hospital/Location Abbreviation] + [Program Abbreviation] + [Specialty/Clinic Name]
 - Example - [EDM] + [NC] + [AMH] + CYF Crisis

Try it out!

Do you have the Research Coordinator & the Research Learning Home Dashboards?

Question and Answer Period

QUESTION #1: Should we do the conversion course after the main Connect Care workshops?

- **Answer:** Yes. Complete the research conversion eLearning in MyLearningLink after you have completed the Connect Care Research Staff ILT course. The Research Conversion classroom session is done after you have completed all required Connect Care training and will start on May 9, 2022.

QUESTION #2: About receiving email communications re: medication groupers and contraindicated medications, how does an individual request it be resent?

- **Answer:** Please email us at cc.research@ahs.ca

QUESTION #3: Should virtual research visits be recorded in CC?

- **Answer:** It depends if any clinically relevant information will be covered during that visit. If your study has been deemed in scope to be in Connect Care, you are welcome to document these virtual visits in system. But AHS is more concerned about the visits taking place within an AHS care setting. These are the visits that must be in Connect Care.
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Question and Answer Period

QUESTION #4: Do study teams need to add patients that were discharged from hospital but are still on a study and therefore, may attend future visits?

- **Answer:** If your study has write-access in Connect Care, you are required to link them to the study in Connect Care for as long as they are enrolled in the study.

QUESTION #5: It was mentioned that study teams need to enter the date of upcoming research visits. Some visits do not occur for 1-3 years after consent and therefore, there are no specific dates yet for these visits. How does study teams enter these 'unknown' dates?

- **Answer:** These are visits that occur within 2 weeks of Launch 4 and we will link those appointments during the research conversion classroom. Visits occurring within 1-3 years do not need to be linked at this time.

Question and Answer Period

QUESTION #6: How long does study teams have for research conversion activities (i.e. – there is a study team who has many studies conducted out of the Emergency Department and there is a concern it may take a while)?

- **Answer:** You have a two-hour window to complete the conversion activities in the classroom. You are required to complete the Research conversion eLearning prior to attending the classroom session, which will help you efficiently complete the classroom activities. You will be able to complete research conversion activities at your own time (if the 2h slot is not enough) and join our virtual office hours in the afternoon to ask any questions you may have. More information to come.

QUESTION #7: How will researchers who are employed under the University of Calgary have access to MLL to complete the Research Conversion course?

- **Answer:** Everyone who is enrolled in training will have access to MyLearningLink to complete the eLearnings and attend training.
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Question and Answer Period

QUESTION #8: Just a little confusion on the instructor led training, is that the same as the classroom sessions and in that case are you considered having done it if another member of your team represents you? And after instructor led training is when you should do the MLL course?

- **Answer:** The instructor led training will teach you how to access and use Connect Care, which is different from the virtual research conversion classroom sessions. The research conversion session is where you take the learning and apply it to activating your study, linking your patients, checking to ensure that interventional medications are set up appropriately (if applicable).

Question and Answer Period

QUESTION #9: How are you provisioned a role and PRD access for Connect Care (i.e. – I started my role as a research assistant in November 2021)?

- **Answer:** Please send an email to cc.research@ahs.ca with the ethics IDs for the studies you are part of and we will review to determine the level of access to Connect Care you require.

QUESTION #10: Can you access the Connect Care production (PRD) environment via partner apps from the U of C?

- **Answer:** Connect Care will be accessible through MyApps once the end user is provisioned an Active Directory account. They will log in to the AHS Network and access Connect Care. Please submit an IT ticket for more support.

QUESTION #11: Where is the sign-up for the May classroom sessions?

- **Answer:** An email will be sent by the Connect Care Support for Research team that will outline the steps for self-registration to the virtual research conversion classroom session.

Question and Answer Period

QUESTION #12: If the patient will be linked to a trial and specific treatment plan within the trial, is it still necessary to bring common labs to Conversion Part 2?

- **Answer:** No. Treatment plans/Beacon protocols already have the common orders set up. That being said, if there are additional common orders that will be ordered outside of the treatment, then information about those orders will need to be brought to the classroom sessions.

QUESTION #13: Will Sunrise Clinical Manager (SCM) be removed in the future?

- **Answer:** Yes, SCM will eventually be replaced by Connect Care in its entirety. Please reach out to IT and reporting teams for further support.

Question and Answer Period

QUESTION #14: Regarding SCM access – do we know if there will be a button in CC like what we had for e-clinician?

- **Answer:** Yes, there will be a button in Connect Care, similar to how users can have read-only access eClinician. Here is a document on Insite:

<https://insite.albertahealthservices.ca/main/assets/tms/it/tms-it-scm-interim-state-accessing-patient-info.pdf>

We are here to answer your questions.



Contact Connect Care:
CC.Research@ahs.ca