# A Day in the Life of a Research Coordinator

February 6<sup>th</sup>, 2023



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### **Welcome and Opening Remarks**







They improve keep Albertans the quality and safety of care for Albertans



They provide access to potentially life-changing treatments



They update or replace outdated treatments and technologies



They take good ideas and turn them into something and treatment or fewer even better



They shorten the pathways to diagnosis



They achieve more with the same resources



They improve conditions for the AHS workforce and other **Albertans** 



They encourage highly qualified professionals to join AHS

### **Zoom Etiquette**



- Remain muted if you are not speaking
- Be mindful of allowing others to participate, where appropriate
- Leverage the chat window to ask questions
- Be mindful that you cannot be on a Skype, Microsoft Teams and Zoom call at the same time

### **General Reminders!**

### Connect Care: Implementation Timeline



Z H AUNC 0 EDMONTON ZONE

WALTER C. MACKENZIE CAMPUS Aberhart Centre; Clinical Sciences Building; Z Kave Edmonton Clinic: Mazankowski Alberta Heart Institute: Stollery Children's Hospital: TB Central Services: University of Alberta Hospital: Zeidler Centre

East Edmonton Health Centre: Addiction & Mental Health Bed Management

**CLINICIAN TRANSITION** Ambulatory clinics

Connect Care Patient Portal: Connect Care Provider Portal

PHARMACY & DI Sites in: Urban and Suburban Edmonton

ALBERTA PRECISION LABS Sites in: Edmonton: All Edmonton Pathology; All DynaLIFE in Alberta; Cross Cancer Institute: Lab and Transfusion Medicine

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NORTH ZONE 9 Acute and combined acute and long term care sites; < Continuing Care Ш (intake/transition) encompassing the former I Peace Country Health Region: Fort Vermilion: High Level: La Crete

PRECISION LABS & DI Sites in: former Peace ZZ Country Health Region; Fort Vermilian; High Level;

CALGARY ZONE

Foothills Medical Centre (including associated clinics at Richmond Road Diagnostic & Treatment Centre)

Acute and combined acute and long term care sites; encompassing the former David Thompson Heath Region including the Centennial Centre for Mental Health and Brain Injury and Sylvan Lake Advanced Ambulatory Care Service; AMH ambulatory services in the former David Thompson Heath Region; Continuing Care (intake/transition)

AMH ambulatory sites encompassing the former Peace Country Health Region; Fort Vermilion; High Level; La Crete; Paddle Prairie; Rainbow Lake

PROVINCIAL PROGRAMS

CancerCare Alberta North; CancerCare Alberta South; Kidney Care North: Kidney Care South

PHARMACY & DI

Sites in: Calgary; former David Thompson Health

ALBERTA PRECISION LABS

Sites in: former David Thompson Health Region

NORTH ZONE

Acute and combined acute and long term care sites; home care; AMH ambulatory sites encompassing the former Aspen and Northern Lights Health Regions; Continuing Care (intake/transition);Community Palliative; Geriatrics; Supportive Living; Home

SOUTH ZONE

Acute and combined acute and long term care sites encompassing the former Chinook and Palliser Health Regions; Continuing Care (intake/transition); Community Palliative; Geriatrics: Supportive Living: AMH ambulatory sites: Home Care

PHARMACY & DI

Sites in: former Aspen: Chinook; Northern Lights; Palliser Health Regions

ALBERTA PRECISION LABS Sites in: former Aspen; Chinook; Palliser Health Regions

CALGARY ZONE,

Community Care; Continuing Care (intake/transition); Home Care; Supportive Living; Standalone Long TermCare; Public Health

CENTRAL ZONE.

EDMONTON ZONE Community Care; Supportive Living: Standalone Long TermCare; Public Health

NORTH ZONE, SOUTH ZONE Community Care: Public Health

**AFFILIATES** 

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Bethany Group; Capital Care Group; Carewest

Corrections encompassing all 10 Provincial Correctional Facilities

Community Care; Continuing Care (intake/transition); Community Palliative; Geriatrics; Home Care; Supportive Living: Public Health

Launched November 3, 2019



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Launched October 24, 2020

Launched April 10, 2021

Launched

May 28, 2022

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Launched November 6, 2022

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EDMONTON ZONE

Suburban acute and combined acute and long term care sites; Continuing Care (intake/transition)

PROVINCIAL PROGRAMS\* Interim Dialysis and Renal Care (Walter C. Mackenzie Campus only)

PHARMACY & DI Sites in: Suburban Edmonton

ALBERTA PRECISION LABS Sites in: Suburban Edmonton

Alberta Children's Hospital; Peter Lougheed Cen Southern Alberta Forensic Psychiatric Centre (and associated forensic services); Rural acute and combined acute and long term care sites

Sheldon M. Chumir Health Centre; South Calgary Health Centre; Airdrie; Okotoks; Cochrane; including AMH Urgent Care sites; AMH rural ambulatory clinics

Glenrose Rehabilitation Hospital; Lois Hole Hospital for Women; Royal Alexandra Hospital; AMH Addiction/Residential Programs

PHARMACY & DI

Sites in: Edmonton; Calgary including Central Production Pharmacy

¥¥ ĕ ALBERTA PRECISION LABS

Alberta Children's Hospital Genetics Services South Lab;Edmonton including Glenrose Rehabilitation Hospital; Royal Alexandra Hospital; Grey Nuns Hospital; Misericordia Community Hospital

CALGARY ZONE

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Rockyview General Hospital; South Health Campus Hospital: AMH Ambulatory sites

EDMONTON ZONE

Alberta Hospital Edmonton; Grey Nuns Hospital; Misericordia Community Hospital: Villa Caritas

CENTRAL ZONE

Acute and combined acute and long term care sites encompassing the former East Central Health Region, including AMH Ambulatory sites

PHARMACY & DI

Sites in: Edmonton; Calgary including Outpatient MRI At South Calgary Health Centre: former East Central Health Region

ALBERTA PRECISION LABS Sites in: former East Central Health Region; Provincial Lab; all Calgary Zone

CALGARY ZONE, Community Care, Continuing Care (intake/transition); Home Care; Supportive Living; Standalone Long TermCare: Public Health

CENTRAL ZONE,

EDMONTON ZONE

Community Care; Supportive Living; Standalone Long TermCare; Public Health

NORTH ZONE, SOUTH ZONE

Community Care: Public Health

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Bethany Group; Capital Care Group; Carewest

Community Care; Continuing Care (intake/transition); Community Palliative; Geriatrics: Home Care: Supportive Living: Public Health

Subject to Change Updated November 8, 2022



### Research in Connect Care

Current State: There are 1708 active studies currently in Connect Care.

- 1,337 Interventional studies
- 363 Observational studies
- 8 Unclassified

#### Patient Enrollment Statistics

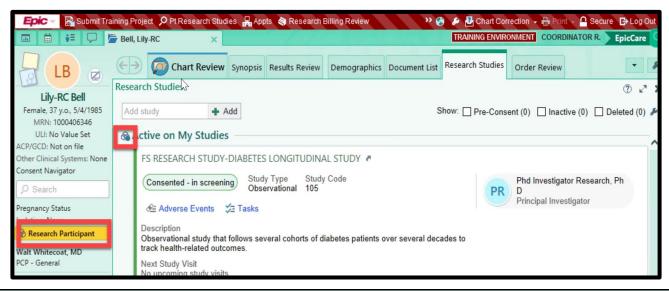
- 10,121 patients enrolled in interventional studies
- 11,459 patients enrolled in observational studies
- 33 patient enrolled in unclassified studies

#### Research studies can take place in any location:

- Emergency departments
- Inpatient and Ambulatory clinics (including oncology)
- Surgery & transplant units
- Pediatric departments
- Diagnostic Imaging

AHS collaborates with university affiliated staff to integrate additional research teams into Connect Care.

### What has Already been Covered...



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CBC and differential

- Integrated care means: One Patient = One Chart
- Importance of the research icon
- Communication is key
- Roles and Access
- Training Sequencing and Requirements

# What You Should Know when Getting Ready for Launch

### Organizational Drivers for Research



### Enhance Patient Safety

 This is achieved by increasing transparency of clinical care provided by linking and associating research studies to reflect patient research activities in Connect Care.

### Integrate Inquiry & Research into Operations

 Create processes and workflows to perform, track, and report on inquiry and research

### Research Aware Patient Care: Research Flag

Care Team

Nurse
Allied Health
Technicians
Physician
+
Research Study
Coordinator
(AHS/non)

#### Research Module











### What Studies are In-scope for Launch?

### Clinical research projects that meet any of the following criteria:

- Interventional drugs trials and investigational device studies
- Requires the use of recruitment tools, or research-study specific order entry or documentation
- Requires release of information to external study monitors
- Coordinators require notifications of ED arrivals or admissions
- Incorporates billable items (i.e., observational studies with labs or other testing)

### What Studies are NOT In-scope for Launch?

### Clinical research projects that may be excluded for a research (RSH) record in Connect Care:

- RSH record creation is **optional for non-interventional studies with minimal patient care impact requiring only a single research order** (such as a blood draw or urine sample for enrollment eligibility) where the service area can support non-Connect Care requisitions and where patient consent permits linkage of study participation to their medical record. This includes:
- An RSH record for these studies may be created if all the following apply:
  - 1. Principal investigators and study teams expressly request the use of Connect Care to manage their patients;
  - 2. Study staff agree to take Connect Care training;
  - Study staff agree to comply with RSH record and patient association maintenance workflows;
  - 4. Research orders cannot be accommodated outside of Connect care;
  - Patients have explicitly consented to their research participation linked to their medical record.

### How do I Request Access for a Study?

1. Submit your study information including all the study team members associated with the study







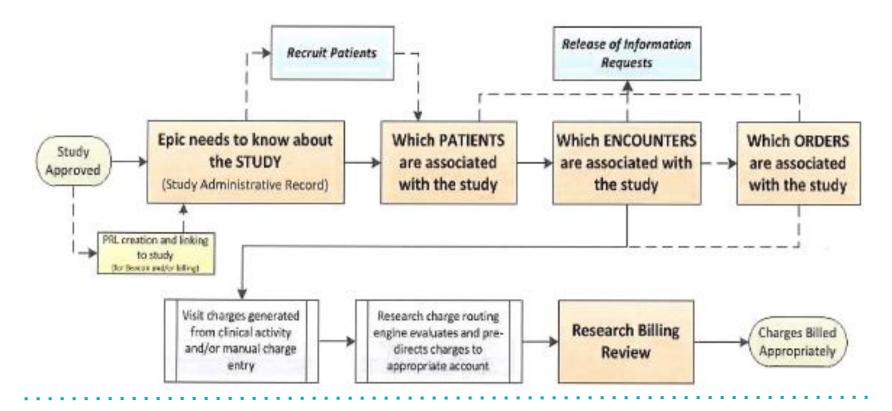
5. Test your access and confirm your study information at Conversion Lab



Even if you have already submitted your Research Conversion Intake form and you think your responses may have changed, you will have an opportunity to re-submit the form regarding the need of Connect Care access.

Visit the <u>Health System Access Webpage</u> for instructions.

## How Clinical Workflows Complement the Research Workflows and What to be Expected



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### What will or will not change?

If you're doing it on <u>paper</u> ...You'll be doing it <u>electronically in-system</u> at launch

- Access to data for research studies
- Enter information into Connect Care to replace other EHRs
- Research records and workflows will be integrated within Connect Care

### **Important Reminders!!!**



### Research and Inquiry – Meeting Expectations for Day 1

#### Teams and Users must be Identified

Individuals who previously did not have direct access to the patient chart, including university-employed research coordinators, will have access and responsibilities to keep the patient record (as it

relates to research), up-to-date.

Training will be Provided Training in all CC research-related workflows will be research role-specific.

Information is required from research teams, please read and reply to the Connect Care emails.

### Principal Investigator – Responsibilities Key Messages

- Provide oversight of the study
- Clinical care workflows
- Respond to critical communications from cc.research@ahs.ca and Health System Access (HSA)
- Ensure time is available for coordinators/team to train and get familiar with workflows, participate in conversion

### **Research Conversion**

### How is Study Information Converted into Connect Care?

- Research conversion is the process of preparing research studies that impact patient care for use in Connect Care. This includes:
  - Loading and activating research studies
  - Building research specific drugs and orderable items
  - Linking patients to research studies
  - Linking research specific appointments to studies
- Completing the Research Conversion activities will allow you and your team to be better prepared for Launch and be able to focus on your patients and your studies instead of the system during your Go-Live date.
- It's your chance to try the system before the "start date".

### **Additional Research Conversion Information**

- Research Conversion is set to begin April 17-28, 2023 leading up to Launch 6 on May 6<sup>th</sup>, 2023.
- Virtual Conversion Classroom sessions will be scheduled with live support and 'how-to' guides for staff while working on their studies in the virtual session
- The conversion session will include:
  - Part 1: Verify Studies and Enroll Patients
- Part 2: Link Encounters, Document Investigational Meds, and Personal Settings
- Most coordinators will need from 1 to 2 hours to complete all classroom activities that are included during research conversion.
  - 1 representative per study (the person who will be performing the steps to set-up the study) is required in the virtual classroom

with the strong recommendation that the entire study team view the research conversion recorded guide on MLL.

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### **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, list of contraindicated meds, 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	Required if over 100 patients	Required if fewer than 100 patients	Required if fewer than 100 patients	Required	Optional	Optional
Research	Site (Location)	REB	Patient ID	Patient ID	Patient Name	Patient DOB	Current	Study Arm /	Study
Study Name		Number	Number	Туре		(DD/MM/YYY	Enrollment	Branch	Participant
(Short Title)			(ULI	(choose from		Y)	Status		ID
			preferred)	list, ULI					
				preferred)					
Sample Study	University of Alberta Hospita	Pro000012	123456789	ULI	Mouse, Mickey	25/01/1955	Enrolled		
Sample Study	University of Alberta Hospita	Pro000012	456789123	ULI	Duck, Donald	14/02/1965	On Follow-Up		
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### Department Naming Convention: How to Select the Right Department

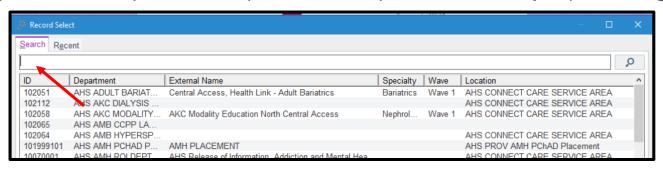
Step 1: Log into Connect Care PRD

Step 2: Click on the magnifying glass to search for your department



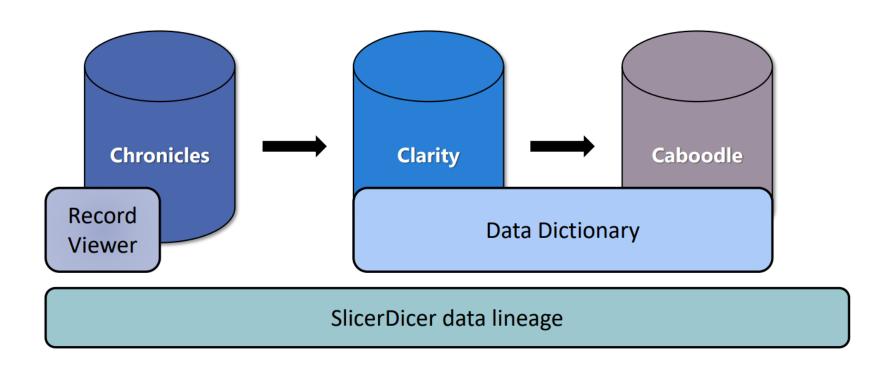
Step 3: Use the following naming convention; enter into the text field:

Zone (i.e. – EDM) → Site (i.e. – RAH) → Area/Dept (oncology)



# Research & Data and Analytics in Connect Care

### Investigating Data



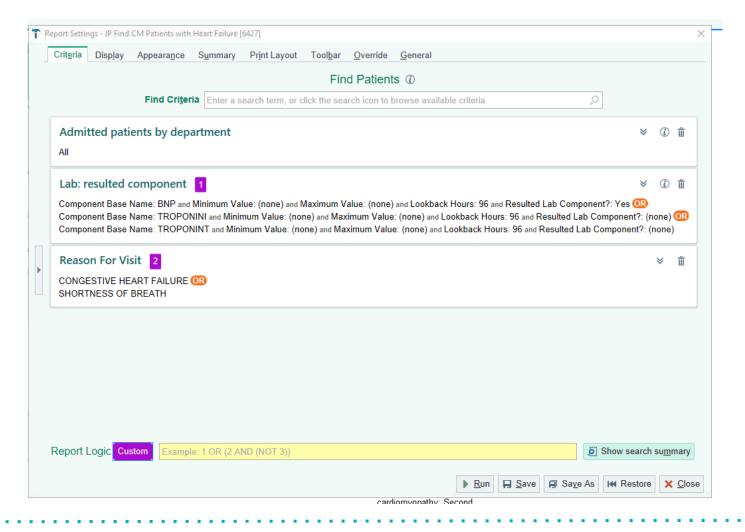
### **Understanding Inquiry-Support Tools**

	Radar	SD SlicerDicer	Workbench	Metrics
Real-time source	$\checkmark$		$\checkmark$	$\checkmark$
Abstracted source	$\checkmark$	$\checkmark$		$\checkmark$
Refresh rate	Hourly	Daily	Real-time	Daily
Large query OK	$\checkmark$	✓		$\checkmark$
Drill-down details	$\checkmark$	$\checkmark$	$\checkmark$	
Chart/activity links	$\checkmark$	✓	$\checkmark$	$\checkmark$
Export to Excel		$\checkmark$	$\checkmark$	
Mobility (Canto iPad)			$\checkmark$	$\checkmark$

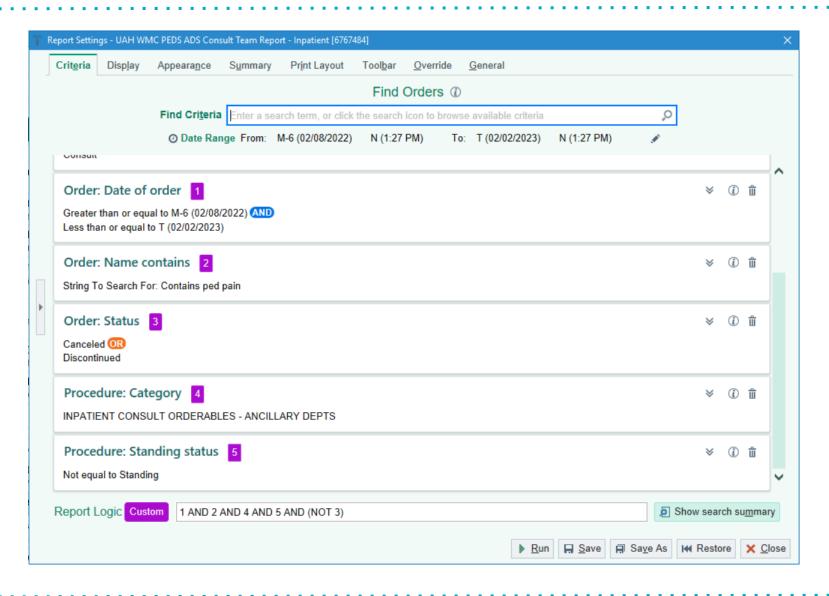
### In-System Information – *Study Management Reports*

Туре	Purpose	Example
Radar Dashboards	<ul> <li>Visualize real-time and analytical data from Epic and non-Epic sources</li> <li>Integrated into workflows</li> <li>Summarize data via charts and graphs</li> </ul>	Research Reporting Home: a "home page" for coordinators to access tools for billing review, release to external monitors, research links, and patients in preconsent status awaiting follow-up
Reporting Workbench	<ul> <li>Real-time actionable data</li> <li>Integrated into Hyperspace and workflows</li> <li>Ad-hoc self-service reporting</li> <li>Take action and make data driven decisions like jumping to patients chart</li> <li>Export data</li> </ul>	Find Patients Associated with My Research Studies: for research staff to keep track of patients who are involved with any study the user is involved in Find Upcoming Appointments for Patients on My Studies Find Research Adverse Events for Follow-Up: coordinators can review adverse events that have been documented for patients enrolled in their studies

### Let's look



#### Research and Connect Care



### **Research and Connect Care**

Service	Department Department	AHS GC Provid	Current Facility	Infection Status	Isolation Status	Alray Ryw	Diet Orders	CC	Diagnoses	Pulse
Neurology 1 1	EDM UAH WMC 4G3 NEUROSCIENCES	EDM UAH WMC	EDM WMC University of Alberta Hospital				(491353846) Adult Diet Easy to Chew	Extremity Weakness	CVA (cerebral	62
Stroke	EDM UAH WMC 4G4 NEUROSCIENCES	EDM UAH WMC NEUROLOGY - STROKE WARD [261]	EDM WMC University of Alberta Hospital	Exposed Communicable Disease Contact	Contact and Droplet		(490867467) Adult Diet Minced; Pureed Bread Products; Mildly Thick Fluids (Nectar)		Stroke; ICH (intracerebral hemorrhage)	61
Stroke	EDM UAH WMC 4G4 NEUROSCIENCES	EDM UAH WMC NEUROLOGY - STROKE WARD [261]	EDM WMC University of Alberta Hospital	COVID-19	Contact and Droplet		(491183674) Adult Diet Easy to Chew; Diabetic Medium (1600-1800 kcal); Cut/Diced	Extremity Weakness / Symptoms of CVA or TIA	Stroke	56
Stroke	EDM UAH WMC 4G4 NEUROSCIENCES	EDM UAH WMC NEUROLOGY - STROKE WARD [261]	EDM WMC University of Alberta Hospital	Exposed Communicable Disease Contact	Contact and Droplet		(491423031) Adult Diet Dysphagia Soft; Mildly Thick Fluids	Extremity Weakness / Symptoms of CVA or		66

### What is SlicerDicer?

- SlicerDicer is a self-service reporting tool that provides users with intuitive and customizable data exploration abilities.
- Using SlicerDicer, users can find the data they need to investigate a hunch, and then refine their searches on the fly to better understand the data they work with.
- Right in Hyperspace, they can examine trends, drill down to line-level details, and jump to related records to follow up.





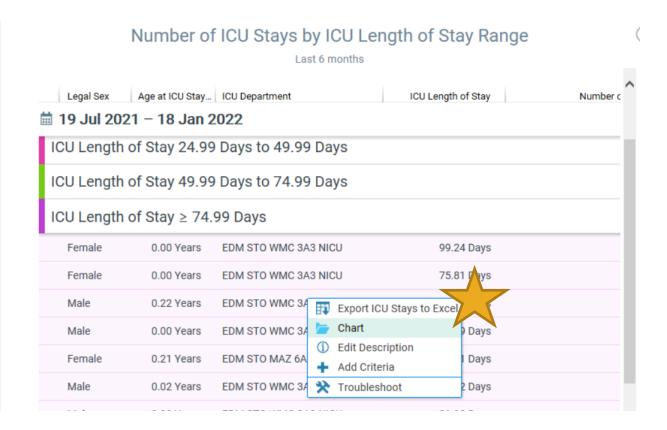


#### Research and Connect Care





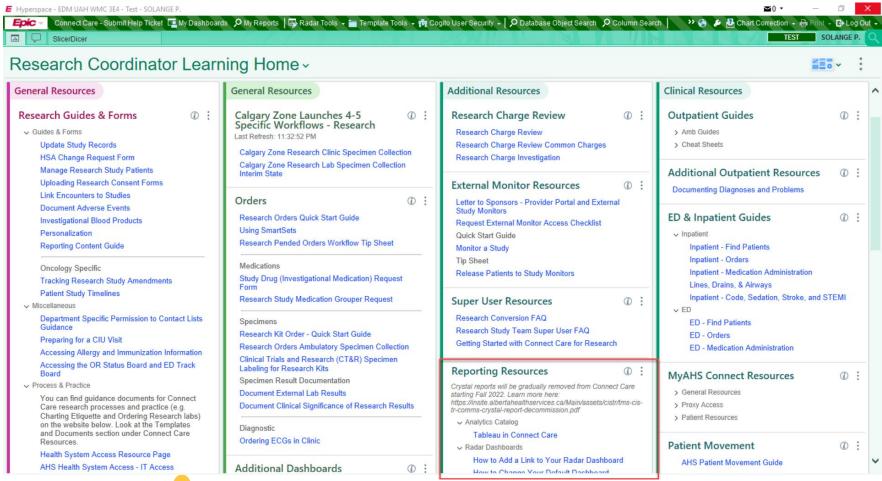








#### Research and Connect Care







### Analytics Catalog: Content



Dashboards



Components



Workbench
Templates/Reports/Models





SlicerDicer Sessions and Data Models





## Support and Resources

### Finding Help& Submitting Tickets

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 non-urgent issues

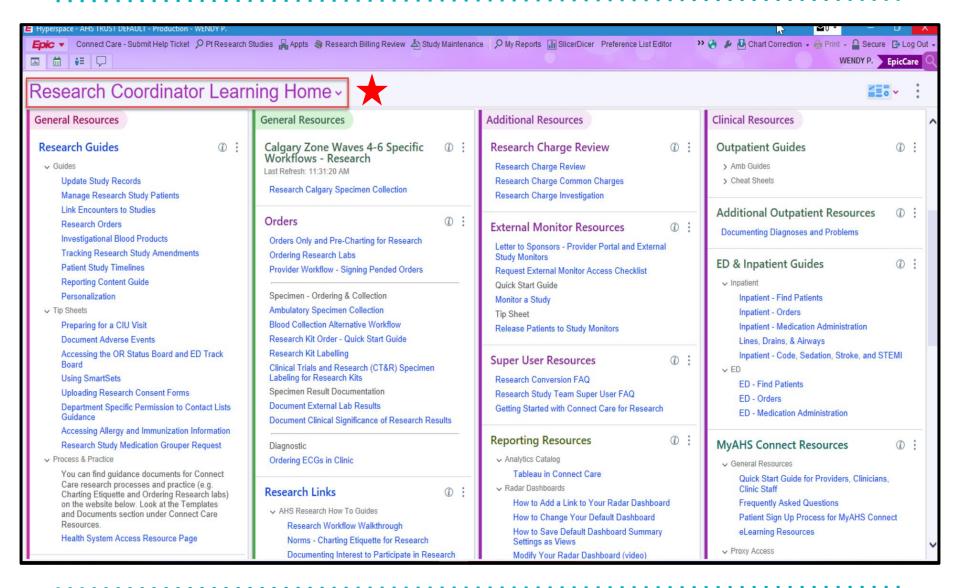
- 1. Ask a local research super-user first; your colleagues are your first best resource.
- 2. You can also submit a Connect Care IT ticket for non-urgent research-specific system issues using our online concierge form refer to Connect Care IT ticket. Under 'Issue Type', select 'Research'.

### **Important Resources**

- Health System Access Webpage
- Getting Started with Connect Care
- CC Research Coordinator Checklist
- CC Research Training Requirements and Sequencing
- CC Research Clinical Department and Service Area Tip Sheet
- CC Research Charting Etiquette Guide



#### Research and Connect Care





## Remember: Research is care!!

### We are here to answer your questions!



For general inquiries and to sign up for Connect Care Research Communications, including event invites, email **CC.Research@ahs.ca** 



For questions regarding the study intake process or approvals related to your study, contact Research.Administration@ahs.ca



For questions related to training requirements and role assignment, contact **HSAResearchITAccess@ahs.ca** 



### **Question and Answer Period**

**QUESTION #1:** We had requested exclusively read-access; for uploading patient consents to the record, do we require write-access?

 Answer: Uploading patient consents to the record is a form of documentation directly to a patient chart and requires write-access to complete. However, if your study does not require any clinical interventions or treatment of participants at an AHS facility, then this documentation would need to be maintained outside of system.

**QUESTION #2:** Do we need to go back and upload consent for patients enrolled before go-live?

Answer: No, you do not need to upload informed consent forms prior to the Launch of Connect Care at your site. You only need to upload consent forms for patients that are enrolled after launch.

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### **Question and Answer Period**

QUESTION #3: I have 500 participants enrolled in our research study. How long will the research conversion take me?

Answer: It only takes a few minutes to link a patient to your study in Connect
Care. The classroom will only be 2 hours long, but you will have a couple of
weeks to complete the linkage prior to the launch of Connect Care. As long
as you link the patient before their next appointment.

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