January 31, 2021

Connect Care Research Update

Welcome to a brand new year. We all wish 2021 bring everyone a few reasons to smile, and let's all stay safe out there.

Connect Care wave 2 launched Oct. 30, 2020 and we welcomed new end users in-system. We experienced the virtual research training and conversion classrooms for the first time along with our wave 2 users, and extend a big 'thank-you' to all of our colleagues for their patience with one another while navigating the virtual technology hiccups. We made it through, and continue to improve our tech-savvy capabilities. Being the start of a new year, this update is packed with news for research end users, so read on for recent highlights!

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   b. Update to More Activities menu
   c. Adding Documentation Only ('Write Note') encounters to Patient Associations on My Studies Report

2. **Education:**
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5. **Finding help for your questions and requesting on-site assistance**
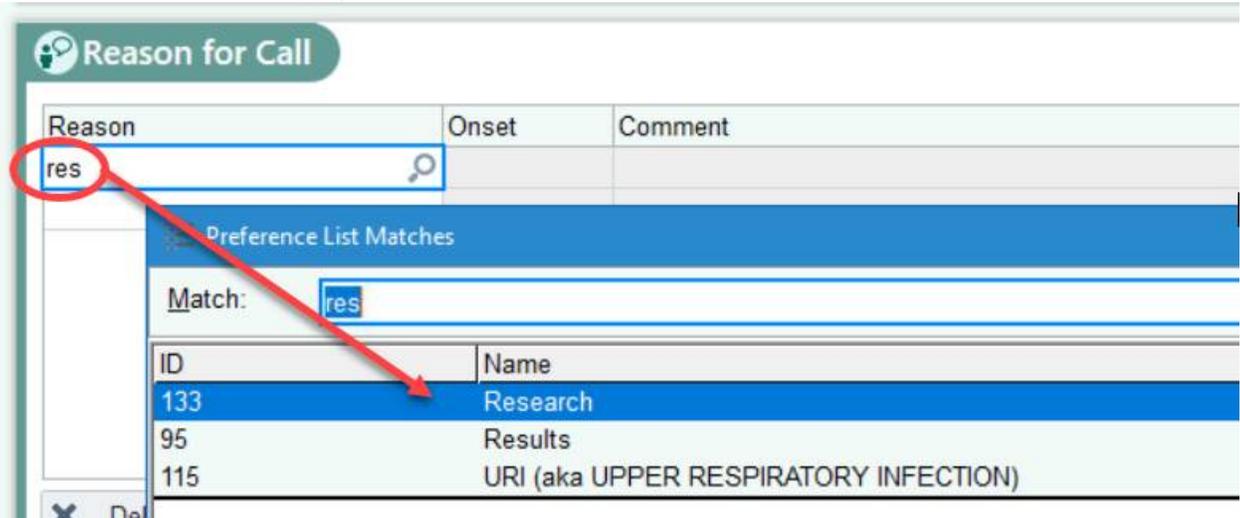6. **More resources for Research end-users**

1. **Research IT:**
   a. **System Update:** "Research" added to the Reason for Call Preference List.
      Issue: Enhancement
      Description: This update makes it easier for end users to quickly search "Research" as a call reason when documenting in a Telephone Call Encounter. Users can still search for "Research" as a call reason on the Facility List.

      Date of Fix: November, 2020
      Impact to Users: Minimal impact. This should make it easier for end users to find the Research reason within their menus.

   b. **System Update:** Update to the More Activities menu for Research Coordinators
      Issue: Enhancement
      Description: This update removes the retired Letters activity as well as adds a few additional activities to the More Activities menu (such as Communications, Work List, Scans).
      Date of Fix: November, 2020
      Impact to Users: Minimal impact. This should make it easier for end users to find these activities within their menus.

   c. **System Update:** Adding Documentation Only ('Write Note') encounters to Patient Associations on My Studies Report
      Issue: Enhancement
      Description: The template report 'Find Patients Associated with Research Studies' has been replaced. This new version, and the subset of public and private user reports located under the template, now includes the Documentation Only encounter ('Write Note') as one of the options from the 'Encounter' drop down menu. Research end users are now able to select from a more comprehensive menu of Encounter options, including the 'Write Note' documentation only

encounter.

Date of Fix: February 16, 2021 at noon.
Impact to Users: Users will be able to choose write note directly from their report. Although users should not notice any changes to their current saved reports or how they run, please submit an IT ticket to Research if any reports are missing.

2. **Education:**
   a. **Connect Care System Update – Secure Chat – Messages Older than 30 days will be deleted**
      - Anyone using Connect Care has access to Secure Chat. Secure Chat is the preferred and approved tool for instant messaging within Connect Care. It is a secure messaging hub that allows users to send secure text messages to colleagues in real time.
      - From **January 14, 2021**, messages older than **30 days** will be purged (deleted) from the system. Please note, the 30-day timeline is from the date of the message, which could lead to some messages that form part of a conversation string being deleted. Once a Secure Chat message is purged, it cannot be recovered.

   b. **Now Available: Uploading Research Consent Scans – Tip Sheet**
      The following tip sheet is available on Insite and covers how to upload research consents into Connect Care as well as the recommended naming convention. The link is also available from your Research Coordinator Learning Home Dashboard.
      [Uploading Research Consent Forms](#)

   c. **Norms - Charting Etiquette Document for Research**
      Connect Care provides a powerful clinical information system (CIS) for all who work with Alberta Health Services (AHS) to care for Albertans. Together, CIS users can leverage advanced documentation, communication and care management tools to decrease information burdens while increasing the impact of health information. The new CIS brings many research functionalities that enables a more informed and seamless process for both research and clinical operations teams when performing research related tasks by providing integrated workflows.

      Charting etiquette is about the digital manners that help information creators and consumers help one another. This [document](#) describes the minimal use and charting etiquette expected from research teams when conducting **REB approved in-system research studies*** in AHS facilities and /or using AHS resources. **It is recommended that all Connect Care research users**

review and keep the *Norms – Charting Etiquette for Research* document accessible for easy reference to ensure all research workflows are completed in accordance to the expectation and training.

*In-system research studies: These are clinical research projects that meet at least one of the following criteria:
• Is an interventional trial or device study
• Includes research-specific visits that will be scheduled in the CIS
• Requires the use of recruitment tools, or research study-specific order entry or documentation
• Requires release of information to outside study monitors
• Requires notifications to study coordinators regarding Emergency Department (ED) arrivals or admissions
• Incorporates billable items (i.e. observational studies with labs or other testing)

d. **Including the Informed Consent Forms (ICF) in Connect Care**
For those users who are either actively working in Connect Care today or those planning to participate in research conversion as part of preparing for an upcoming launch of Connect Care at a clinical site, it is important to understand how you can comply with the charting norms and expectations [add hyperlink to charting etiquette document] for documenting a patients participating in research studies in the patient's health record. Part of those expectations include uploading and/or scanning the patient's signed ICF into the media manager section of the patient chart. Here are some answers to some commons questions we get about this.

Q: Will the consent form that my current participant's signed be sufficient as I being linking paitents to research records in Connect Care?
In the interest of patient wishes and their safety, and in alignment with agreements between university affiliates and AHS, researchers may proceed with research conversion using the existing language in the informed consent forms. It is recommended that for researchers developing new or amended informed consent forms, now or in the coming months, that they always add the most up-to-date REB provided template language that relates to including study participation information in Electronic Medical Records (EMR) in their study-specific informed consent forms. The research ethics boards, CHREB, HREB and HREBA are in support of this approach.

Q: Do I have to upload or scan in the consent forms for patients that were enrolled before our clinical site launched with Connect Care?
A: As part of the charting norms for research, it is requested that the ICF for each patient that has provided consent to participat in a study, when that ICF is signed post-Connect Care launch, that that ICF be uploaded at the same time as patient linking to the research study. For any patients linked to the research study in Connect Care where the patient was enrolled and provided consent in advance of Connect Care launch at that clinical site, it may be recommended to upload the accompanying signed ICF, as it contributes to study related documentation for that patient but is not required. More information on this will be provided as part of the research conversion guide provided to each study team participating in linking patient records to studies in acvance of site launch of Connect Care.

e. **Super User Update**

Becoming a Super User for research can be an excellent way to build confidence in and around launch and to be a resource for other research teams around you as they undergo the process of bringing research into the patient record. Super user training teaches research users who have taken the required research application training how to address questions, find the solutions and work at launch to do with user needs. It is important that Super Users are prepared to assist end users that may need help with Connect Care launch activities and in turn, support sustainability of the system after launch. Super Users are in place to help mitigate any issues when following research specific workflows and/or supporting quality improvements with existing or new workflows. Share and discuss the upcoming changes with your team.

Are you a research user who will be coming into Connect Care in Waves 4 or 5? You may wish to nominate yourself or others to act as a research Super User.

The minimal requirements are that each Super User must;
1) Be listed as an active member of a research study as outlined in an REB approval,
2) Be approved to work in Connect Care in a read/write capacity and complete training of the Research Staff training
3) Have a role in the day-to-day conduct of a research study in a clinical space

Interested individuals may put their name, study name & REB approval ID and which wave they are involved in to cc.research@ahs.ca . We will contact interested individuals to inform them of next steps.

It is important that Super Users are prepared to assist end users that may need help with Connect Care launch activities and in turn, support sustainability of the system after launch. Super Users are in place to help mitigate any issues when following research specific workflows and/or supporting quality improvements with existing or new workflows. Share and discuss the upcoming changes with your team.

On behalf of the AHS Super User Team: It has been a busy new year with all the resequencing activities that are going on. This Super User Newsletter January 2021 is later than usual, but the team wanted to let the dust settle a bit before sending it out. If you have any questions, please send them to connectcaresuperusers@ahs.ca.

3. **Training:**

a. **Research Staff ILT Course Update – Virtual Training**

Research Staff ILT training 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 are directly contacting users to ensure this access before training dates. Of note, the prerequisite courses for Research Staff ILT, such as Ambulatory Nurse Shared will continue to be provided as in-classroom training.

New hires and those requesting this training can apply and find out more at:
https://extranet.ahsnet.ca/teams/AHSRA/ITAccess/SitePages/CC%20Research%20Resources.as

px and can apply for access/training by filling out the "I am a new user" access request form. Of note: This form is intended for requesting training when your site is already live with Connect Care. if you are a user that will be coming in as part of a new wave, you will request this access by responding to the request form that was provided for each of yoru studies. You do not need to submit an additional request form.

b. Next dates: Research Staff ILT – Virtual Training
     i. February 3-4, 2021, 8:00am to 12:00pm
     ii. March 3-4, 2021, 8:00am to 12:00pm
     iii. April 7-8, 2021, 8:00am to 12:00pm

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 Webinar
The Connect Care Research Support Team offers webinars on the 3rd Monday of each month on various topics including getting ready for launch, research conversion and using Connect Care as part of your research study. At the end of each webinar, regardless of the topic, you and your team can ask questions about Connect Care at a 'town hall' or 'ask anything' type session. If you have not already received the webinar invites regularly, you can sign up for the monthly notifications by sending your request to cc.research@ahs.ca.

The next Connect Care Research Webinar is scheduled for Wednesday, February 17th from 12pm to 1pm. We will cover the topic: 'Key Research Workflows in Connect Care'.

You can find links to previously recorded webinars, here under the heading 'Presentations and Videos'.

A note about posting and retiring content: After a recent review of existing materials and recordings that are posted on the HSA website, some content has been removed based on relevance and duplication. This means that some of the links to previous webinars will no longer be available or work in lieu of the content being taken down. Please know that the most current information on the topics previously shared will be reflected in the Connect Care user guides, tip sheets, and how-to documents located on your Research Coordinator – Learning home dashboard, as well as contained in the webinar recordings and materials which are still posted on the HSA website located within the Research Resources section.

c. Recent AHS releases and communications
For further reading on Connect Care Inquiry and Research we encourage you to read the following:
- Connect Care Bytes Blog
- All research stakeholders (including non-AHS employees) can access an assortment of Connect Care research related information at: Health Systems Access (HSA) (the

right-hand side of the AHS Health System Access Resource Page in a section called 'Connect Care Resources')

d. Recently Updated Blogs
- For CMIO Physicians and Prescribers, please see <u>AHS Chief Medical Information Office</u>

e. Have you missed an update? Previously Released Newsletters archive
Previously released and archived of information can be found on the Health Systems Access (HSA) webpage as per the following hyperlink: <u>Health Systems Access (HSA)</u>

5. **Finding help for your questions and requesting on-site assistance:**
Your Connect Care Research Support Team has expanded to serve you even better! The Connect Care Research Support Team wants to ensure the timely resolution, proper documentation and reporting of your Connect Care-related questions and concerns to minimize potential risks to the safe delivery of patient care. So read on to ensure you know how to reach out for help.

For Urgent issues (including login or device concerns) or IT related issues call 1-877-311-4300
(Please visit: <u>Insite IT Service Desk & Solution Center</u> for more information).

For your research workflow issues:
1) Ask a local research super-user first; your colleagues are your first best resource.
2) **Solutions Center** – to connect with someone immediately by telephone, call 1-877-311-4300 and follow the prompts to reach a live person and submit a Connect Care IT ticket:
   - Wait for the automated messages; if you do not have an AHS employee number, just wait on the line
   - Press '1' for Clinical Applications during the next automated message prompt
   - Then press '1' for Connect Care
   - and then press '1' again for Connect Care 'how to'

   The staff on call at the Solution Centre will access their resources to answer your questions in real-time and submit a ticket with you on the line.

3) ***New* Connect Care Concierge form selections available!**

> If you have an issue that is **NOT URGENT** pertaining to workflows, orders, order sets, flowsheets, navigators, or have an enhancement idea.
>
> More >

Please enter an alternate contact (this is now mandatory):

If the individual above is not available, who else should we contact?
(For example co-worker, manager, super user, etc.)

[   ]

Phone Number

[   ]

And add details as follows:

- Select '**Research'** in the revised prompt '**To help us route your query appropriately, please select what category best matches your issue or concern'** (former title was Issue Type).
- Search for your **Connect Care Department name**. This has been corrected and you are now able to enter the department you are experiencing the research issue and can select **any** department without limitation. Previously, this list was restricted and only two departments were available for selection when submitting a Research issue. If you need help identifying your department when in Hyperspace, please view the 'tip box' next to this field on the Concierge Form for guidance.
- Select the **patient care setting** that applies to your situation (is it outpatient? Inpatient? Emergency department?)
- Add an **Issue Title**

To help us route your query appropriately, please select what category best matches your issue or concern.

[Research   ⌄]

Indicate the Connect Care Department name
(see the tips box for finding department name)

[EDM STO WMC PED CIU   ]

Select the patient care setting

[Outpatient   ⌄]

Issue Title

[Research -   ✕]

Lastly, enter an issue description, click 'submit' and you are done! You should see a ticket number on screen and receive a confirmation email to your AHS email address.

Note: If a Patient Safety Event has occurred (hazard up to harm), it is recommended that you submit a [Reporting and Learning System (RLS) report](#) and include your service desk ticket number in your report.

If your workflow or service-related issue relates to performing research care workflows in combination with pharmacy, lab or diagnostic imaging, directly email or call your service area contact.

For assistance with study, study team member approvals and/or study set-up in Connect Care, submit the appropriate form on the Health System Access (HSA) website ([HSA Assistance Hyperlink](#)). For status updates on submitted requests to HSA, contact research.administration@ahs.ca.

For new users (people or sites who are not yet in system), 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

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