



# eUROGEN CPMS panel creation protocol

v.08.03.2021

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## 1. PATIENT UPLOAD

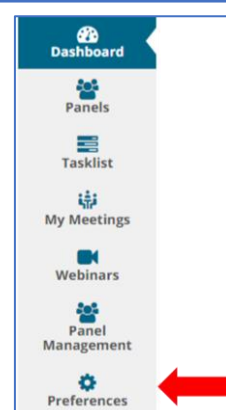
### 1.1. Aim

This document describes the steps required to both enrol a patient and create a panel in CPMS as a support for the CPMS users of ERN eUROGEN.

## 2. FIRST LOGIN

Before trying to access CPMS, you will need to create an EU login and make a CPMS access request. This process is described in a separate document (For more info see: <https://eurogen-ern.eu/for-our-clinicians/cpms/>). Once this is completed and authorised you will receive a confirmation email that your access was approved after which you can login for the first time in CPMS.

- When logging in for the first time your personal preferences are requested, namely your role and thematic area.
- Type in your professional role (this will be shown beside your name in panels)
- Choose a thematic area of the eUROGEN where you requested access for
  - WS 1 Rare congenital uro-recto genital anomalies
  - WS 2 Functional urogenital conditions requiring highly specialised surgery
  - Rare urogenital tumours
- To save these preferences please click **Update preferences**
- To update your preferences at any time, simply click on the **ERN** tab at the top screen
- Then click on **Preferences** in the left bar
- This will open the Preference tab again



## 3. CPMS HOME SCREEN

After logging in to CPMS, the home screen is shown.

- Modules: contains the Centre, ERN and Map tab
- User settings: Here you can change your personal details and preferences regarding notifications (**We recommend viewing these settings**)
- Training videos: Useful video for when using CPMS for the first time, some important videos are the **CPMS overview**, **Enrolling and removing patients** and **Starting a panel and upload files**
- Webinars: Here are several explanatory videos where recent new functions are also explained
- CPMS user manual and documentation: Contains documents concerning several CPMS functionalities

## 4. CREATING A PANEL

### WORKFLOW OVERVIEW

#### Enrol patient

- Go to the Centre tab and select Enrol Patient
- Complete the enrolment and identifying data
- Or select an existing patient from the centre list

#### Consultation form

- Carefully choose a nickname
- Complete the form and add relevant data

#### Attachments

- You can add files under the attachments tab
- Upload your graphical patient abstract here
- Ensure that included media files are anonymous

#### Panel Members

- Accept/Refuse: here you can respond to a panel invitation
- Invited: shows the currently invited panellists and their status
- Available: here you can invite panellists

#### Meetings

- Schedule a meeting through this tab
- Select either individual meeting or part of recurrent ERN meeting
- Alternatively propose multiple time slots

#### Contributions and Outcome

- Record your contribution
- Remind panellists to record their contribution
- Write the outcome of the panel
- Sign-off the panel

#### Close the panel

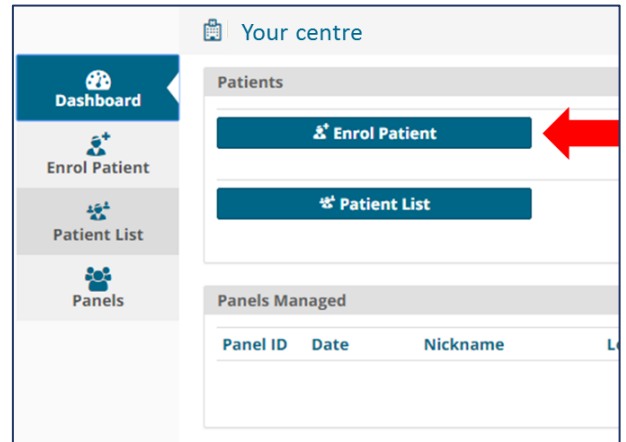
- Close the panel and save the outcome document locally
- Make the patient data available for ERN Databases/registries if applicable

## 4.1. The Centre tab

This tab contains the patients included in your centre (healthcare provider) only. From this tab your local patients can be enlisted and managed. The most important difference with the ERN tab is that patient data is not anonymous in this section.

### 4.1.1 Enrolling a patient

- When in the Centre tab, click on **Enrol patient**
- This will open a tab where you can fill in the patient's data

A screenshot of the 'Enrol Patient' form. At the top, it says 'Enrol Patient' and has a note: 'Note: All authorised users from this centre can see all patients enrolled within this centre regardless of enrolling user.' Below this is a section titled 'ENROL PATIENT'. It contains fields for 'Patient Id' (labeled 'Automatically created'), 'Date enrolled' (with a date picker), and a checkbox for 'Have you sought advice on this patient at a national healthcare provider organisation?'. There is a 'Download Model Consent Forms' button. Below this is a table for 'Consents' with columns 'Consent Requested', 'Consent Given', and 'Date'. The table has three rows: 'Consent for care', 'Consent for ERN databases/Registries', and 'Consent contact for research'. Each row has radio buttons for 'Yes' and 'No'. Below the table is a section titled 'Identifying data' with fields for 'First name', 'Last name', 'Gender' (a dropdown menu), 'Date of birth' (with a date picker), and 'Record Label'. At the bottom right are 'Cancel' and 'Enrol Patient' buttons.

- At patient ID a name is automatically created
- The consent forms can be downloaded by clicking on **Download model consent forms**
- The consent forms are not uploaded in CPMS but locally stored
  - please make sure they are saved with the patients' file and can be found again (eg if patient removes consent)
- Fill out the required fields to complete the enrolment
  - No specific medical information is required here
  - The record label is automatically created but can be adjusted if desired
- Once finished click on **Enrol patient**
- The next screen will give you the option to **open a new panel**

## 4.2. Opening a panel

- After enrolling a patient, you will automatically continue to the option to open a new panel
  - You can also access this option for previously enrolled patients by clicking on **Centre > Patient list >** and select the patient where you want to open a panel

**CONSULTATION REQUEST**

Do not use any nicknames liable to identify the patient, including his/her first name or last name.

\* Nickname:

Is urgency required for this panel? ☐

\* Is this a repeat of a previous panel for the same patient but a different episode? ☐ Yes ☐ No ☐ Don't know

\* Consultation request description:

\* Consultation request reason: ☐ Diagnosis ☐ Treatment ☐ Other

\* Healthcare provider:

\* Point of care specialist:

\* ERN: eUROGEN

\* Panel lead:

Panel Manager:

\* Primary thematic area: ☐ WS1 Rare congenital uro-recto-genital anomalies  
☐ WS2 Functional urogenital conditions requiring highly specialised surgery  
☐ WS3 Rare urogenital tumours

Primary Disease Area:

- Click on **Open a new panel**
- From here on the patient data will be processed anonymously therefore, a nickname is required
  - Centres using an electronic patient file often use local patient numbers which are different from social security numbers. An option is to use the local patient number as a nickname because it can only be connected to the patient at the local centre by authorised personnel
  - As an example, at the Radboud centre we use NL09RBNR[local patient number] as a nickname. the NL09 is the code for our centre followed by RBNR which is short for Radboud patient number, followed by the patients' number
- Fill out the required fields to complete the form
  - At the point of care specialist, the name of the main treating physician of the patient is mentioned
  - note that initially, the Panel Lead can only be set to be someone in your Centre, but this can be changed later on. Guest users will not have the option to choose a Panel Lead.
  - Select the panel lead from a list of locally registered CPMS users
  - If available, select a local panel manager
- Once all fields are completed click on **Create panel** to complete this form

## 4.3. Editing your panel

- You will now see the panel overview screen like the example below

#4255 CPMS tryout **PANEL IN PROGRESS**

**Centre** FR09 - Assistance Publique-Hôpitaux de Paris, Hôpital Necker-Enfants Malades\_eUROGEN  
**Lead Manager** eurogenhpuser1 testuser  
**ERN** eUROGEN - Urological Diseases  
**Thematic Area** WS2 Functional specialised surgery  
**Date created** 08/Mar/2021

**Consultation Form** Attachments Panel Members Meetings Contributions & Outcome

eUROGEN Consultation Form Recorded: 08/Mar/2021 12:56 (Europe/Paris) by: eurogenhpuser1 testuser [Download] [Edit]

**CONSULTATION REQUEST**

Nickname: CPMS tryout

\* Is this a repeat of a previous panel for the same patient but a different episode? No

\* Consultation request description: Advice for further treatment

\* Consultation request reason: Treatment

- In the consultation request you will find the data you just entered
- To provide medical information regarding your case click on **Edit**
- On the left you will find a column with specific medical subject, check the box next to it to open this heading and provide the information
- You can provide the patient information that you find essential to each specific section and click on **Save** to finish editing the patient data
- The newly added information will be shown after saving in the panel overview, here you can check for correctness and completeness

☒ Consultation Request

☐ Patient Information

☐ Episode Description

☐ Rare Disease Diagnosis

☐ Comorbidities

☐ Health Behaviours

☐ Allergies and Other Adverse Reactions

☐ History of Past Illness and Disorders

☐ Surgical History

☐ Medication Summary

☐ Others

## 4.4. Attachments

- Alternatively, rather than adding patient information to each of the predefined sections, a graphical patient abstract can also be made and uploaded to CPMS as a PDF file
  - When using PowerPoint to create a case overview with inclusion of essential media files we would like to **emphasize the importance of saving the file as PDF** to prevent further editing
  - When using screenshots in your abstract, please remove all patient identifying data
- To upload a graphical patient abstract or medical documents click on the “**Attachments**” section

#4255 CPMS tryout **PANEL IN PROGRESS**

Centre	FR09 - Assistance Publique-Hôpitaux de Paris, Hôpital Necker-Enfants Malades_eUROGEN	ERN	eUROGEN - Ur
Lead	eurogenhpuser1 testuser	Thematic Area	WS2 Functiona
Manager	eurogenhpuser1 testuser	Date created	08/Mar/2021

Consultation Form **Attachments** Panel Members Meetings Contributions & Outcome

- Click the **Attach file / image** button to upload files
- Confirm that no patient identifiable information is included in the file you want to upload and click on **Attach**
- You can then select or drag files from your computer folder to attach them
- Provide the file with a label and click **Attach**
- After the loading bar is complete the file can be seen under the heading Files / images
- Click **Save** to finish the uploading of files

Attach Image or File

Drop Documents, Images, Videos, or other files here or click to upload.

Cancel Attach

## 4.5. Panel Members

- When viewing the panel overview after editing of the data, you can click the **Panel Members** button

#4255 CPMS tryout **PANEL IN PROGRESS**

Centre	FR09 - Assistance Publique-Hôpitaux de Paris, Hôpital Necker-Enfants Malades_eUROGEN	ERN	eUROGEN - Ur
Lead	eurogenhpuser1 testuser	Thematic Area	WS2 Functiona
Manager	eurogenhpuser1 testuser	Date created	08/Mar/2021

Consultation Form Attachments **Panel Members** Meetings Contributions & Outcome

- Under Panel Members there will appear four tabs to choose from

Accept / Refuse Invited Available Co-ordinator Assistance

- Accept / Refuse:** here you can accept or refuse a panel invitation you received
- Invited:** this tab shows the currently invited panellist and their status
- Available:** here you can select per workstream which panellist you would like to invite
- Co-ordinator Assistance:** use this tab if you would like **help from the ERN coordinator** appointing you panel or if you would like to request for **Cross-ERN panel members**
  - Be specific about your question and which expertise you require
  - Provide member names If you have specific members of another ERN you want to invite

## 4.6. Requesting additional data

- Once participants have accepted your invitation, they can also request additional information
- When this is done you will receive an automated email that additional data has been requested
- If you login to CPMS and go to **ERN > Dashboard > Requests for additional data**

Requests For Additional Data		
Additional Data Requested By	Created Date	Completed Date
eurogenhpuser2 testuser	04/08/2020	

- This shows the data request, click on it to go the panel overview
- In the timeline column on the right side, the request is shown
- Click on the **Action** button to add the additional data
- In this screen you can respond to the panel member
- If additional data is still needed, click on **Mark as pending** to let the panel know you have read the request
- Once you have provided the additional data click on **Mark as Complete** to sign off the data request
- Your response will appear in the timeline column on the left

eurogenhpuser2 testuser  
eurogenhpuser2 04/Aug/2020 13:56  
testuser agreed to join the panel

**Requested: eurogenhpuser2 testuser**  
Please provide the 04/Aug/2020 14:00  
reports of previous surgeries

**Action**

Add a comment

### Additional Request

Status: **Requested**

Responsible: **eurogenhpuser1 testuser**

**eurogenhpuser2 testuser** 04/Aug/2020 14:00

Please provide the reports of previous surgeries

Additional request text response

Add Comment

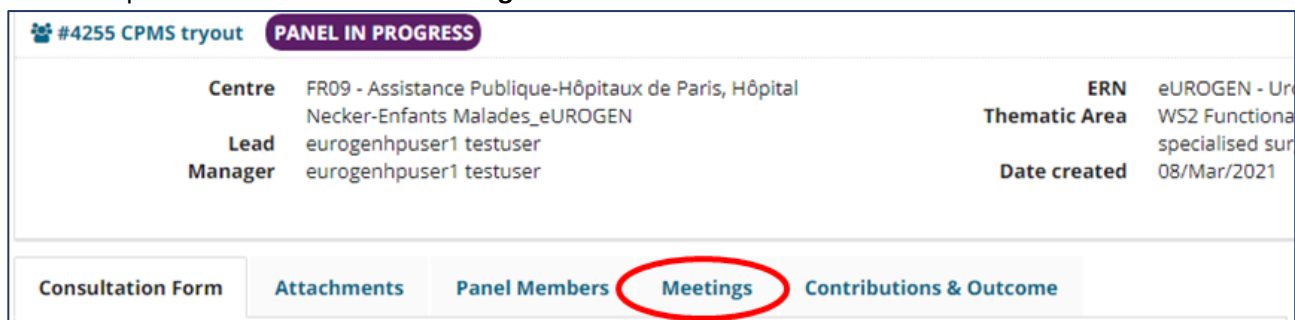
« Summary Set to Requested Mark as Pending Put on hold

**Mark as Complete**

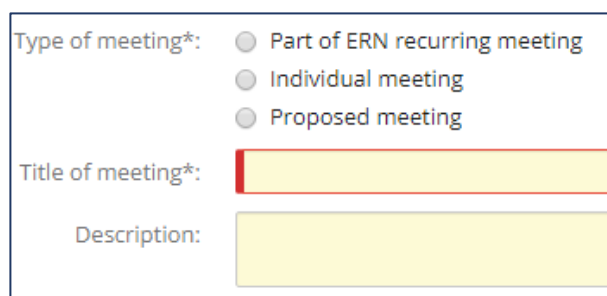
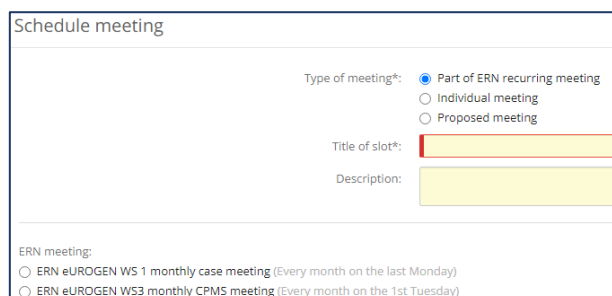


## 4.7. Meetings

- Once enough panel members have accepted a meeting can be scheduled. This can be done in three options which are further explained separately.
  - Part of ERN recurring meeting
  - Individual meeting
  - Proposed meeting
- In the panel overview click on **Meetings**

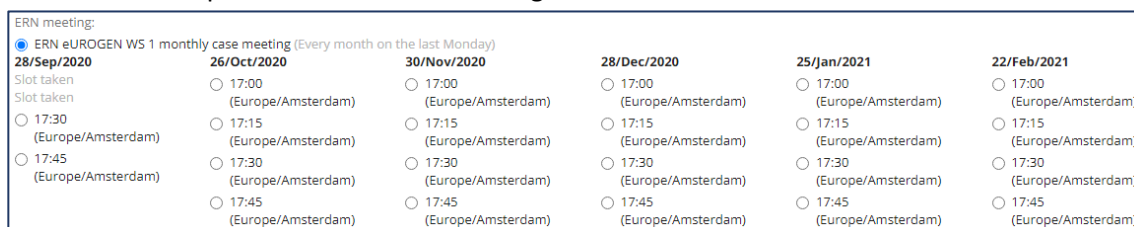


- This will show you the upcoming and past meetings. Click on **Schedule meeting** to plan a new meeting

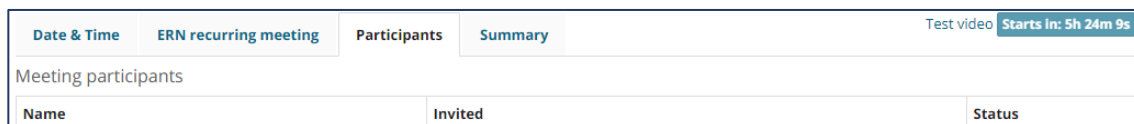


### 4.7.1 Part of ERN recurring meeting

- Part of ERN meeting: will show regular ERN meetings where a panel can be discussed beforehand
  - Then click on **Part of ERN recurring meeting**
  - Select the specific Workstream meeting



- Then click on **Schedule slot**



- Automatically the panel coordinator and manager are invited. To send the invitation to the remaining panel member scroll down and click on **Invite** for each participant.
- Optionally, you can also invite members which were not invited before, by scrolling down further and clicking on Invite

## 4.7.2 Individual meeting

- A single meeting at a specific time and date
  1. Click on Individual meeting
  2. Fill out the required fields and click on **Schedule meeting**

Date & Time	Participants	Summary	Test video	Starts In: 4h 26m 9s
Meeting participants				
Name	Invited	Status		
eurogenhpuser1 testuser	28/sep/2020 12:33 (Europe/Paris)	Host		
Invite the members of your panel				
Name	Invite			

3. Do not forget to individually invite the member of the panel in the participants tab

## 4.7.3 Proposed meeting

- Multiple time slots can be added, and panel members can mark their preferences

Type of meeting*:	<input type="radio"/> Part of ERN recurring meeting
	<input type="radio"/> Individual meeting
	<input checked="" type="radio"/> Proposed meeting
Title of meeting*:	<input type="text"/>
Description:	<input type="text"/>
Duration:	<input type="text"/> minutes
Proposed slots:	<input type="button" value="+"/> <input type="button" value="Schedule Meeting"/>

1. Click on the + next to proposed slots to add time and date slots
2. Click on **Schedule meeting** to continue

Date & Time	Participants	Summary	Test video	Starts In: 4h 26m 9s
Meeting participants				
Name	Invited	Status		
eurogenhpuser1 testuser	28/sep/2020 12:33 (Europe/Paris)	Host		
Invite the members of your panel				
Name	Invite			

3. Do not forget to individually invite the member of the panel in the participants tab

## 4.7.4 Opening a meeting

- Under upcoming meetings you can see your scheduled meeting
- At the time of the meeting the countdown button will change to **Join Meeting**

Upcoming meetings	
Title	test
When	08/Mar/2021 15:55 (Europe/Paris)
Description	None
Status	Upcoming
Test video	Starts In: 2h 9m 15s

## 4.8. Contribution and outcome

### 4.8.1 Contributions

- When the panel has been discussed either through a meeting or by comments alone. Click on the tab **Contributions & Outcome** to record your contribution and create a panel outcome

#4255 CPMS tryout **PANEL IN PROGRESS**

<b>Centre</b>	FR09 - Assistance Publique-Hôpitaux de Paris, Hôpital Necker-Enfants Malades_eUROGEN	<b>ERN</b>	eUROGEN - Ur
<b>Lead Manager</b>	eurogenhpuser1 testuser	<b>Thematic Area</b>	WS2 Functiona specialised sur
		<b>Date created</b>	08/Mar/2021

Consultation Form Attachments Panel Members Meetings **Contributions & Outcome**

- Enter your contribution and the relevant outcome/advice
- Provide the time spent on the panel outcome
- If you would like to have the individual contributions of the panellist you can remind them by clicking on the **Request Contributions** button
- Click on **Record Contribution** to save your work

Contributions [Request Contributions](#)

eurogenhpuser1 testuser

Record your contribution here

Or attach file:  Geen bestand gekozen

How much time did you spend on this Assessment?  HRS  MINS

[Record Contribution](#)

### 4.8.2 Outcome

- To create a final panel outcome click on the **Edit** button below

Outcome

No outcome drafted

[Edit](#) [Sign-off](#)

- Record the final outcome of the panel
- Select your opinion on the usefulness and satisfaction of the panel outcome
- Click the **Save** button to register the outcome
- The **Sign-off** button will now become available, click on it to sign-off the panel
- Confirm if you want to sign-off the panel

**The panel has been signed off**

You can now download the outcome document from the panel banner. If this panel is now complete please close the panel by clicking the **Close Panel** button at the top of the panel banner.

## 4.9. Closing the panel

- To access the panel outcome click on **Outcome document**

#4255 CPMS tryout **PANEL SIGNED OFF** **Close Panel**

<b>Centre</b>	FR09 - Assistance Publique-Hôpitaux de Paris, Hôpital Necker-Enfants Malades_eUROGEN	<b>ERN</b>	eUROGEN - Urogenital Diseases
<b>Lead Manager</b>	eurogenhpuser1 testuser	<b>Thematic Area</b>	WS2 Functional urogenital conditions requiring highly specialised surgery
		<b>Date created</b>	08/Mar/2021

**Outcome Document**

- This will open a new window with a PDF document of the panel case and outcome document
  - We recommend this document to be locally saved and attached to the patient file
  - We recommend that this document is shared with the patient by the treating clinician and discussed when planning future treatment
- To close the panel, click on the **Close panel** button
  - Please note that this action is irrevocable
- Fill out the Questionnaire
- Click on **Continue to Closed** to finally close the panel
- Your panel phase will switch to Closed, and it is now finished
  - If your patient has signed consent for the sharing of the data for registries (on the initial ERN consent form) then click on **Make Data Available for ERN Databases/Registries**
  - The Archive Panel option removes the panel from the ERN list and makes it only visible for the local centre. We recommend **not to use** this option unless advised by eUROGEN team members or upon request of the patient.

Transition to Closed

You have chosen to transition to a new state, **Closed**.

This is an irrevocable action! When you close this panel it is still visible within the ERN but a closed panel cannot be restarted.

Questionnaire

How much time did you spend on this Panel?  HRS  MINS

\* Was the panel a success? ☐ Yes ☐ No ☐ Not Determined

What was the Outcome? ☐ Diagnosis ☐ Treatment ☐ Clinical Trial ☐ Un-diagnosed ☐ Other

\* Patient Status ☐ Alive ☐ Dead ☐ Lost to follow up ☐ Opted out

**Cancel** **Continue to Closed**

**Archive Panel**

<b>ERN</b>	eUROGEN - Urogenital Diseases
<b>Thematic Area</b>	WS2 Functional urogenital conditions requiring highly specialised surgery
<b>Date created</b>	08/Mar/2021

**Make Data Available for ERN Databases/Registries**

**Outcome Document**