



Canadian
Cancer Clinical
Trials Network

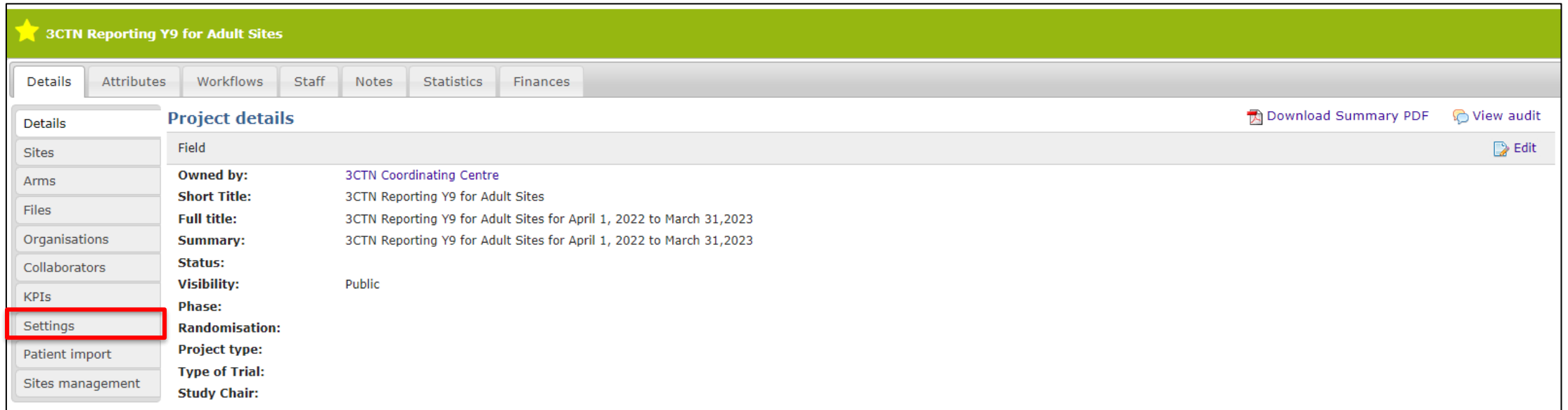
Satellite Site Remote Access Reporting

- To improve remote access patient reporting, 3CTN member sites, primary and satellite sites, are encouraged to report any remote access patients they see.
- To track this, four attributes have been added to the **Priority Patient Entity**.*
- Satellite sites should enable “**allow patient transferring**” at the **project level (green banner)** of the current fiscal year’s reporting project (e.g., 3CTN Reporting Y9 for Ped Sites or 3CTN Reporting Y9 for Adult Sites).
- To track remote access patients, you can add a patient and mark **all patient status** dates as “**did not occur here.**” This will not affect recruitment totals or duplicate patient counts.

*For EDGE Live sites you will need to add the additional attributes to your own priority patient entity (see slide 14)

Step 1: Allow Patient Transferring

- At project level (**green banner**) of the current fiscal year's reporting project (i.e., **3CTN Reporting Y9 for Ped Sites or 3CTN Reporting Y9 for Adult Sites**) click on **“Settings”** from the left navigation bar.



The screenshot shows the user interface for the project "3CTN Reporting Y9 for Adult Sites". The page has a green header bar with a star icon and the project name. Below the header is a navigation bar with tabs for "Details", "Attributes", "Workflows", "Staff", "Notes", "Statistics", and "Finances". The "Details" tab is selected. On the left side, there is a vertical navigation menu with options: "Details", "Sites", "Arms", "Files", "Organisations", "Collaborators", "KPIs", "Settings" (highlighted with a red box), "Patient import", and "Sites management". The main content area is titled "Project details" and contains a table of project information. At the top right of the main content area, there are links for "Download Summary PDF" and "View audit". At the bottom right, there is an "Edit" button.

Field	
Owned by:	3CTN Coordinating Centre
Short Title:	3CTN Reporting Y9 for Adult Sites
Full title:	3CTN Reporting Y9 for Adult Sites for April 1, 2022 to March 31,2023
Summary:	3CTN Reporting Y9 for Adult Sites for April 1, 2022 to March 31,2023
Status:	
Visibility:	Public
Phase:	
Randomisation:	
Project type:	
Type of Trial:	
Study Chair:	

Step 1: Allow Patient Transferring

- Click on **“Edit Project Settings”** in the top right corner

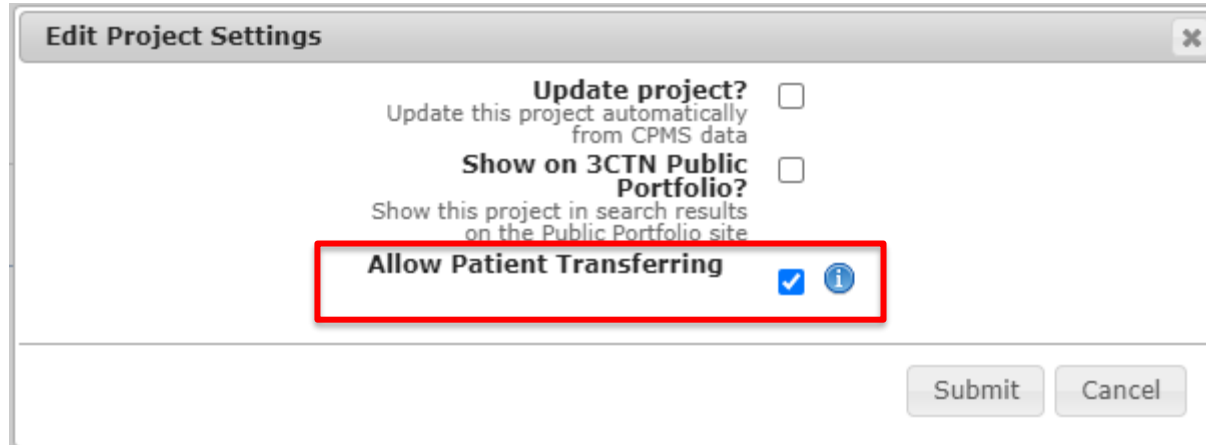
The screenshot shows the '3CTN Reporting Y9 for Adult Sites' interface. At the top, there is a green header bar with a star icon and the text '3CTN Reporting Y9 for Adult Sites'. Below this is a navigation bar with tabs for 'Details', 'Attributes', 'Workflows', 'Staff', 'Notes', 'Statistics', and 'Finances'. The 'Details' tab is selected, and a sidebar on the left contains a menu with options: 'Details', 'Sites', 'Arms', 'Files', 'Organisations', 'Collaborators', 'KPIs', 'Settings', 'Patient import', and 'Sites management'. The main content area is titled 'Project settings' and contains a table with the following data:

Option	
Central Portfolio Management System Primary record	No
Update from Central Portfolio Management System	No
Allow Patient Transferring	No
Show on 3CTN Public Portfolio?	No

In the top right corner of the 'Project settings' section, there is a button labeled 'Edit Project Settings' which is highlighted with a red rectangular box.

Step 1: Allow Patient Transferring

- Check “**Allow Patient Transferring**” and click “**Submit**”



Edit Project Settings [X]

Update project?
Update this project automatically
from CPMS data

**Show on 3CTN Public
Portfolio?**
Show this project in search results
on the Public Portfolio site

Allow Patient Transferring ⓘ



Submit Cancel

Step 2: Adding a Patient with no Patient Status Dates

- Add a patient to the current fiscal year's reporting project (e.g., **3CTN Reporting Y9 for Ped Sites** or **3CTN Reporting Y9 for Adult Sites**).
- Same process of adding a patient to other projects but when you get to the patient status date window check **“did not occur here”** for patient status dates.
- **Note: you will need to change the project site status to open to recruitment in order to add patients.**

Alternatively, you can import patients to the trial and edit the status dates afterwards.

Patient Status
Enter all the dates up to the current status of your patient

Pre-Screened	<input type="text"/>	by	Schoales, James	<input checked="" type="checkbox"/>
Approached	<input type="text"/>	by	Schoales, James	<input checked="" type="checkbox"/>
 Consented	<input type="text"/>	by	Schoales, James	<input checked="" type="checkbox"/>
Screened	<input type="text"/>	by	Schoales, James	<input checked="" type="checkbox"/>
 Recruited / Randomised	<input type="text"/>	by	Schoales, James	<input checked="" type="checkbox"/>
On treatment	<input type="text"/>	by	Schoales, James	<input type="checkbox"/>
On follow-up	<input type="text"/>	by	Schoales, James	<input type="checkbox"/>
Completed	<input type="text"/>	by	Schoales, James	<input type="checkbox"/>

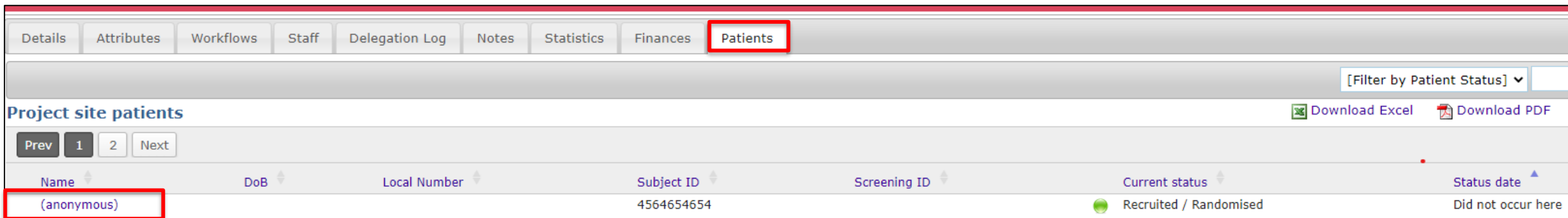
Patient is off study

Did not occur here

Cancel Prev Next

Step 3: Add Priority Patient Attributes to the Patient

- At the project site level (**red banner**) click the “**Patients**” tab
- Click on the patient’s “name” to the left of the patient information



Details Attributes Workflows Staff Delegation Log Notes Statistics Finances **Patients**

[Filter by Patient Status] v

Download Excel Download PDF

Prev 1 2 Next

Name	DoB	Local Number	Subject ID	Screening ID	Current status	Status date
(anonymous)			4564654654		Recruited / Randomised	Did not occur here

Step 3: Add Priority Patient Attributes to the Patient

- At the Patient level, go to “**Attributes**”
- Select “**Add**”



The screenshot shows a web application interface for managing patient attributes. At the top, there is a navigation bar with tabs: Details, Attributes, Workflows, Staff, Delegation Log, Notes, Statistics, Finances, Patients, and Patient details. Below this, a blue header bar displays patient information: (anonymous), DoB: , Gender: . A left sidebar contains a list of menu items: Details, Appointments, Events, Costs, Attributes (highlighted with a red box), Demographics, Assigned projects, and Files. The main content area is titled 'Attributes' and contains a table with columns: Public, Attribute, and Value. The table is currently empty, with the message 'No attributes have been added' displayed in red text. In the top right corner of the main content area, there is an 'Add' button (highlighted with a red box) and an 'Edit all' link.

Step 3: Add Priority Patient Attributes to the Patient

- Select the “**Priority Patient**” entity
- Click on “**Add**” and “**Public**”, and complete relevant data

Add Attributes

Entities

(Please select)

- (Please select)
- Attending Physician
- Currently CRP
- Data Collection Completed (demo)
- Further Screening
- Image Tracking
- Manitoba
- Multiple Gateways
- Path Tracking #1
- Path Tracking #2
- Pathology Request Tracking
- Patient appearance
- Patient Screening
- patient tracker MM
- Priority Patient**
- Regulatory Tracking MM
- Remote Access Patient
- Remote Access Patient (James Schoales)
- Remote Access Patient (JS)
- remote Access Patient (LB)

Save Cancel



Add Attributes

Priority Patient

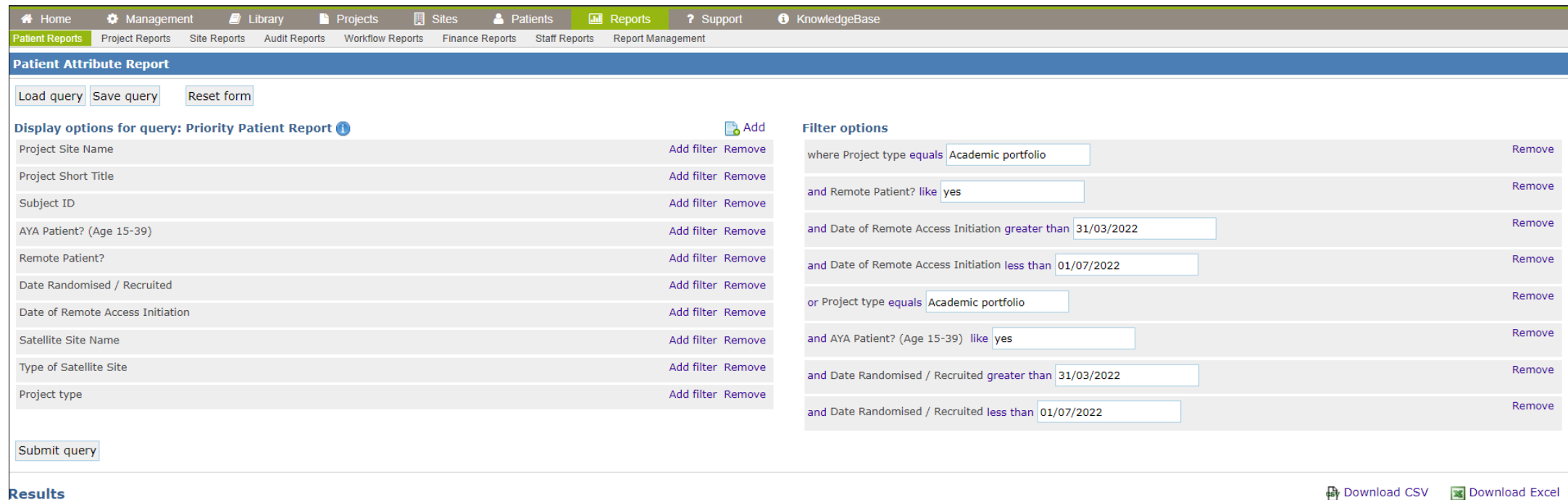
Attributes

<input type="checkbox"/> Add	<input type="checkbox"/> Public	Name	Value
<input type="checkbox"/>	<input type="checkbox"/>	AYA Patient? (Age 15-39)	Select one...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remote Patient?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> RA-1 <input type="checkbox"/> RA-2 <input type="checkbox"/> RA-3 <input type="checkbox"/> Unknown
<input type="checkbox"/>	<input type="checkbox"/>	Satellite Site Name	Select one...
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Type of Satellite Site	<input checked="" type="radio"/> PO-Site <input type="radio"/> C2H-HCP
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date of Remote Access Initiation	08/05/2023
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Satellite Site Clinical Trial Conduct	<input type="checkbox"/> Physical health exam, history, other wellness exams <input type="checkbox"/> Remote patient follow-up, assessments <input type="checkbox"/> Clinical management to adverse events in consultation with the study-site <input type="checkbox"/> Data-capture for study-related conduct <input type="checkbox"/> Administration of chemotherapy or other study-related treatments <input type="checkbox"/> Administration of non-therapeutic trial interventions (e.g. imaging) <input type="checkbox"/> Psychosocial and supportive care related to the study <input type="checkbox"/> Administration of maintenance therapy <input checked="" type="checkbox"/> Laboratory-based tests facilitated closer-to-home
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Primary Site Name	The Hospital for Sick Children
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Trial Short Title (Remote Access)	(COG) ARST2031
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remote Access Comments	Patient is getting blood and pathology done here as part of the (COG) ARST2031

Save Cancel

Step 4: Run and Submit Priority Patient Report

- A priority patient attribute report has been created for portal sites, Live sites will need to update their reports to include the new attributes.
- Date filters are used to limit data to current quarter
- Update the date filters to focus data on quarters being reported
- Run and download report results to MSEXcel



The screenshot shows the 'Patient Attribute Report' interface. At the top, there is a navigation bar with links for Home, Management, Library, Projects, Sites, Patients, Reports (highlighted), Support, and KnowledgeBase. Below this is a sub-navigation bar with links for Patient Reports, Project Reports, Site Reports, Audit Reports, Workflow Reports, Finance Reports, Staff Reports, and Report Management.

The main content area is titled 'Patient Attribute Report' and includes buttons for 'Load query', 'Save query', and 'Reset form'. Below these are 'Display options for query: Priority Patient Report' and an 'Add' button. A list of filters is shown, each with 'Add filter' and 'Remove' options:

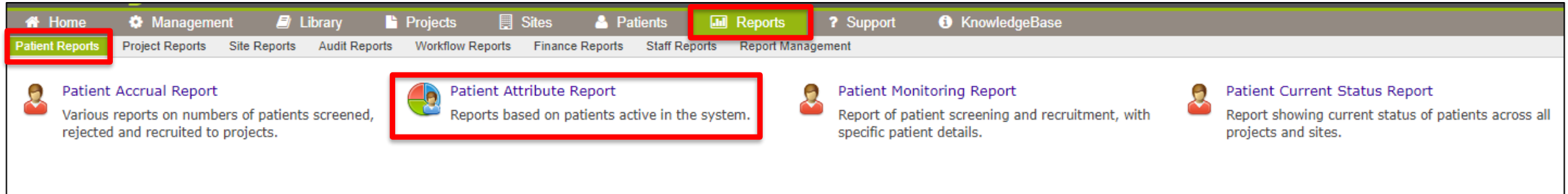
- Project Site Name
- Project Short Title
- Subject ID
- AYA Patient? (Age 15-39)
- Remote Patient?
- Date Randomised / Recruited
- Date of Remote Access Initiation
- Satellite Site Name
- Type of Satellite Site
- Project type

To the right, the 'Filter options' section displays a list of active filters:

- where Project type equals Academic portfolio
- and Remote Patient? like yes
- and Date of Remote Access Initiation greater than 31/03/2022
- and Date of Remote Access Initiation less than 01/07/2022
- or Project type equals Academic portfolio
- and AYA Patient? (Age 15-39) like yes
- and Date Randomised / Recruited greater than 31/03/2022
- and Date Randomised / Recruited less than 01/07/2022

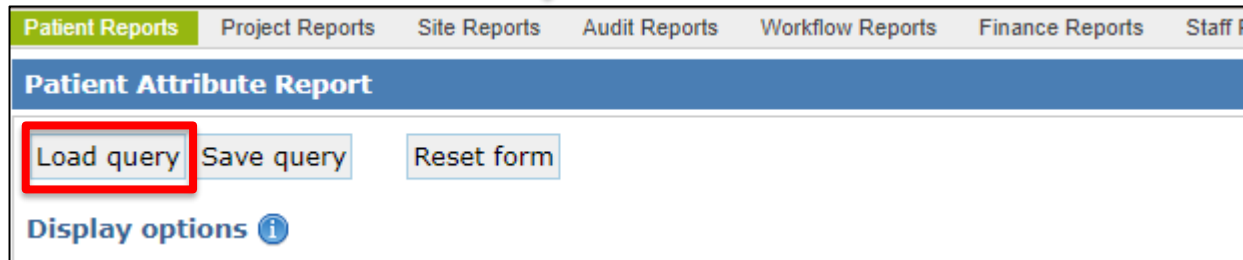
At the bottom left, there is a 'Submit query' button. At the bottom right, there are links for 'Download CSV' and 'Download Excel'.

Step 4: Run and Submit Priority Patient Report

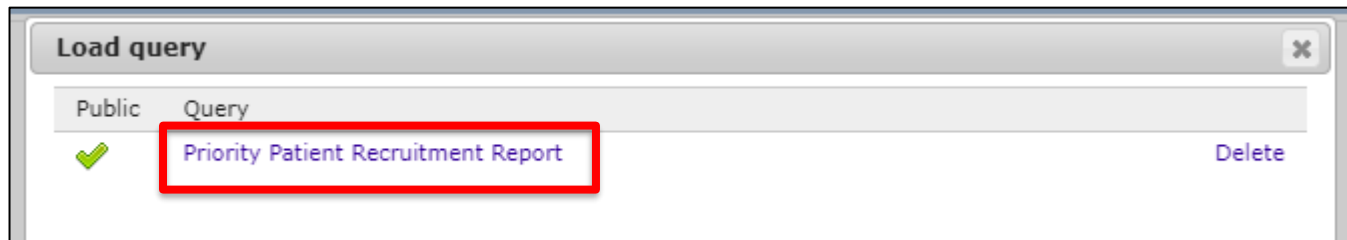


The screenshot shows the top navigation bar with the following items: Home, Management, Library, Projects, Sites, Patients, Reports, Support, and KnowledgeBase. The 'Reports' menu is highlighted with a red box. Below the navigation bar, the 'Patient Reports' sub-menu is active, showing several report options:

- Patient Accrual Report**: Various reports on numbers of patients screened, rejected and recruited to projects.
- Patient Attribute Report**: Reports based on patients active in the system. (This option is highlighted with a red box)
- Patient Monitoring Report**: Report of patient screening and recruitment, with specific patient details.
- Patient Current Status Report**: Report showing current status of patients across all projects and sites.



The screenshot shows the 'Patient Attribute Report' page. The navigation bar is the same as in the previous screenshot. The page title is 'Patient Attribute Report'. Below the title, there are three buttons: 'Load query', 'Save query', and 'Reset form'. The 'Load query' button is highlighted with a red box. Below the buttons, there is a 'Display options' link with an information icon.



The screenshot shows the 'Load query' dialog box. The dialog has a title bar with 'Load query' and a close button. Below the title bar, there is a search field with the text 'Public Query'. Below the search field, there is a list of queries. The first query is 'Priority Patient Recruitment Report', which is highlighted with a red box. To the right of this query is a 'Delete' button. A green checkmark is visible to the left of the query name.

Step 4: Run and Submit Priority Patient Report

- Change date filters to reflect reporting period.
- Then submit and download excel.

Patient Attribute Report

Load query Save query Reset form

Display options for query: Priority Patient Report [i](#)

Project Site Name	Add filter Remove
Project Short Title	Add filter Remove
Subject ID	Add filter Remove
AYA Patient? (Age 15-39)	Add filter Remove
Remote Patient?	Add filter Remove
Date Randomised / Recruited	Add filter Remove
Date of Remote Access Initiation	Add filter Remove
Satellite Site Name	Add filter Remove
Type of Satellite Site	Add filter Remove
Primary Site Name	Add filter Remove
Satellite Site Clinical Trial Conduct	Add filter Remove
Trial Short Title (Remote Access)	Add filter Remove
Remote Access Comments	Add filter Remove
Project type	Add filter Remove

Filter options

where Project type equals Academic portfolio Remove

and AYA Patient? (Age 15-39) like yes Remove

and Date Randomised / Recruited greater than 31/03/2022 Remove

and Date Randomised / Recruited equals 01/07/2022 Remove

or Project type equals Academic portfolio Remove

and Remote Patient? like yes Remove

and Date of Remote Access Initiation greater than 31/03/2022 Remove

and Date of Remote Access Initiation less than 01/07/2022 Remove

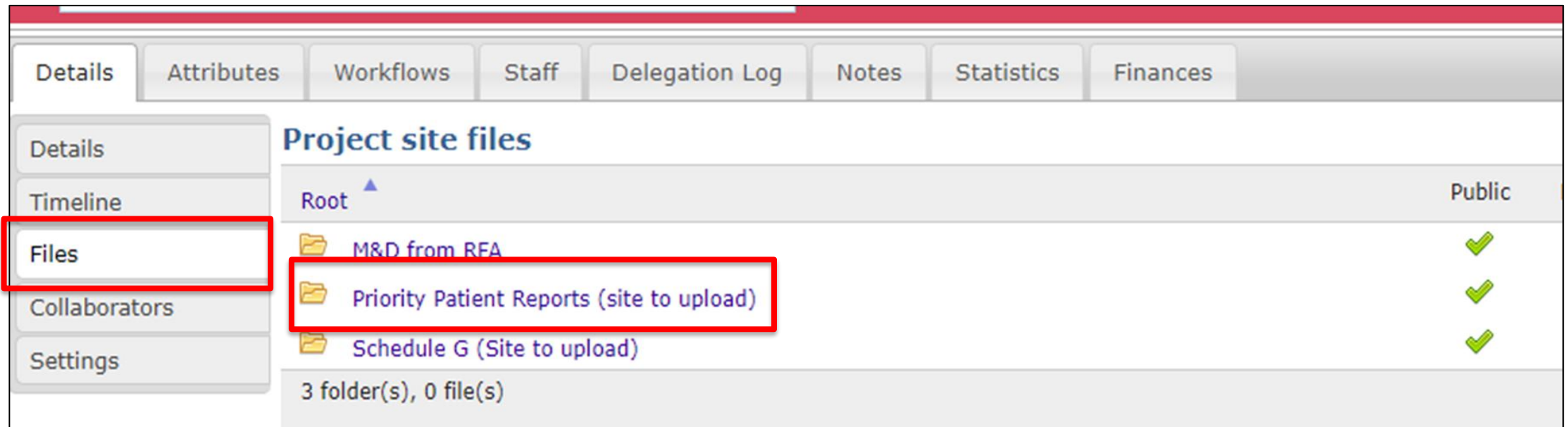
Submit query

Results

Download CSV Download Excel

Step 4: Run and Submit Priority Patient Report

- Under Project Site level for the **3CTN Reporting Y9 for Adult Sites**, or **3CTN Reporting Y9 for Ped Sites** project, as applicable
- Upload your Priority Patient file to the **Priority Patient Reports (site to upload)** folder using **Add file**



The screenshot shows a web interface for managing project site files. At the top, there are tabs for 'Details', 'Attributes', 'Workflows', 'Staff', 'Delegation Log', 'Notes', 'Statistics', and 'Finances'. Below these, a sidebar on the left contains 'Details', 'Timeline', 'Files' (highlighted with a red box), 'Collaborators', and 'Settings'. The main area is titled 'Project site files' and displays a file tree. The tree starts with 'Root' (Public). Under 'Root', there are three folders: 'M&D from RFA', 'Priority Patient Reports (site to upload)' (highlighted with a red box), and 'Schedule G (Site to upload)'. Each folder has a green checkmark in the 'Public' column. At the bottom, it shows '3 folder(s), 0 file(s)'.

Folder Name	Public
Root	Public
M&D from RFA	✓
Priority Patient Reports (site to upload)	✓
Schedule G (Site to upload)	✓

3 folder(s), 0 file(s)

Additional Step for EDGE Live Sites: Add Attributes to Priority Patient Entity

- Add the following attributes to your priority patient entity:
 - **“Satellite Site Clinical Trial Conduct”** as a lookup radio with the following options;
 - Physical health exam, history, other wellness exams
 - Remote patient follow-up, assessments
 - Clinical management to adverse events in consultation with the study-site
 - Data-capture for study-related conduct
 - Administration of chemotherapy or other study-related treatments
 - Administration of non-therapeutic trial interventions (e.g. imaging)
 - Psychosocial and supportive care related to the study
 - Administration of maintenance therapy
 - Laboratory-based tests facilitated closer-to-home
 - **“Primary Site Name”** as a Text field
 - **“Trial Short Title (Remote Access)”** as a Text field
 - **“Remote Access Comments”** as a Text field