

Procedures to Post, Remove & Edit Research Flags in CPRS

OBJECTIVES:

- a) Outline the process to post Category II flags in CPRS for research participants
- b) Provide additional protection to patients that are participating in research studies
- c) Inform the subjects' healthcare providers of their research participation

RESPONSIBILITIES:

- a) Posting a Category II Research Flag for subjects who are participating in research studies will be determined by the Atlanta VA Research & Development Committee.
- b) Contact the Clinical Studies Center Director to request access to the Patient Flag Category II menu option.

PROCEDURES FOR POSTING A RESEARCH FLAG:

- a) To start the process, sign into the "VISTA" Icon located on your computer desk top
Using the same access and verify codes as used with CPRS
- b) Type: **^** FLAG for menu options (**^** = shift and 6 key)
- c) Type FA (FLAG ASSIGNMENT) at prompt (select item 1 or item 2)
- d) Type "SP" to select patient
- e) Enter the desired patient by typing the first letter of the last name and last 4 digits of the social security number. Then, hit enter. Here are some test patients that you can practice on: Z8888, Z1234, and Z7035.
- f) Type "AF" to assign flag
- g) At the "Select a flag for this assignment" type: Research. The computer will perform a search and Research Clinical Trial will appear, hit enter at the yes prompt.

k) Enter the following information in the narrative text box:

- Protocol Title
- Name of PI and contact number
- Study Coordinator and contact number
- Special instructions/information

l) When done, press num lock and E (num lock + E saves the text) to exit narrative field.

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Patient Record Flag - Assignment Narrative Text
==[ WRAP ]==[ INSERT ]=====< Assignment Narrative Text >====[ <PF1>H=Help ]=
This patient is currently participating in The Curious Case of Posting a
Research Flag which is an investigational study.

Please contact the Principal Investigator if additional information is
required.

Special Information:  Questions, confusion, blurred vision (side effects)
Principal Investigator:  Donndra Hall, CAC ext 2964
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m) Hit enter at prompt “Enter Review Date”, then hit enter again to exit.

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Enter Review Date:  (2/23/2011 - 8/22/2011): 8/22/2011//  (AUG 22, 2011)
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n) The “REVIEW OF ASSIGN FLAG DATA INPUT BEFORE FILING” screen will display. You will be asked if you would like to review this new record flag assignment. Enter “no” if you do not wish to review

- o) Hit return/enter to “file this new record flag assignment” Please see the screen shots below

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REVIEW OF ASSIGN FLAG DATA INPUT BEFORE FILING
-----
Patient Name: ZZGRANT,TEST
Flag Name: RESEARCH CLINICAL TRIAL
Flag Type: CLINICAL
Flag Category: II (LOCAL)
Assignment Status: ACTIVE
Initial Assignment: 2/23/2011@14:27:57
Last Review Date: N/A
Next Review Date: 8/22/2011
Owner Site: ATLANTA VAMC
Originating Site: ATLANTA VAMC
Assignment Action: NEW ASSIGNMENT
Action Date: 2/23/2011@14:30:15
Entered By: HALL,DONNDRA D
Approved By: BOWER,DAVID JAMES

Record Flag Assignment Narrative:
-----
This patient is currently participating in The
Enter RETURN to continue or '^' to exit: █

Record Flag Assignment Narrative:
-----
Research Flag which is an investigational study.

Please contact the Principal Investigator if additional information is
required.

Special Information: Questions, confusion, blurred vision (side effects)
Principal Investigator: Donndra Hall, CAC ext 2964

Action Comments:
-----
New record flag assignment.

Do you want to review again? NO//
Would you like to file this new record flag assignment? YES//
Filing the patient's new record flag assignment...
Assignment was filed successfully.

Enter RETURN to continue or '^' to exit: █

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RECORD FLAG ASSIGNMENT      Feb 23, 2011@14:35:20      Page: 1 of
Patient: ZZGRANT,TEST (000006035)      DOB: 04/19/64
ICN: 1012707158V840906      CMOR: ATLANTA VAMC

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Flag	Assigned	Review Date	Active	Local	Owner Site
1 PREGNANCY LACTATION	06/29/10	N/A	NO	YES	ATLANTA VAMC
2 MISSING PATIENT FLAG	06/29/10	N/A	NO	YES	ATLANTA VAMC
3 RESEARCH CLINICAL TR	02/23/11	08/22/11	YES	YES	ATLANTA VAMC

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Enter ?? for more actions
SP Select Patient      EF Edit Flag Assignment
DA Display Assignment Details      CO Change Assignment Ownership
AF Assign Flag
Select Action:Quit// █

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- p) Hit return/enter to “quit” and get out of the flag menu

- q) Go to CPRS and select desired patient. The flag should pop up on the screen. Close it and proceed to make a **“New Note”** in CPRS.
- r) Select the “Notes Tab”, click on “New Note”, then “New Visit”, and enter the “Visit Location” (e.g. “Research Study”) in the box.

Location for Current Activities

Select the appointment or visit that should be associated with the note or orders .

OK

Cancel

Encounter Location
ATL RESEARCH-STUDY Feb 23,11 14:42

Clinic Appointments Hospital Admissions **New Visit**

Visit Location

ATL RESEARCH-STUDY NOW

ATL RESEARCH-ONCOLOGY TRTMNT

ATL RESEARCH-ONCOLOGY-A

ATL RESEARCH-PRE-DIAB SCREEN

ATL RESEARCH-SIBA

ATL RESEARCH-STUDY

ATL RESEARCH-TBI GH

ATL RESIDENTIAL CARE

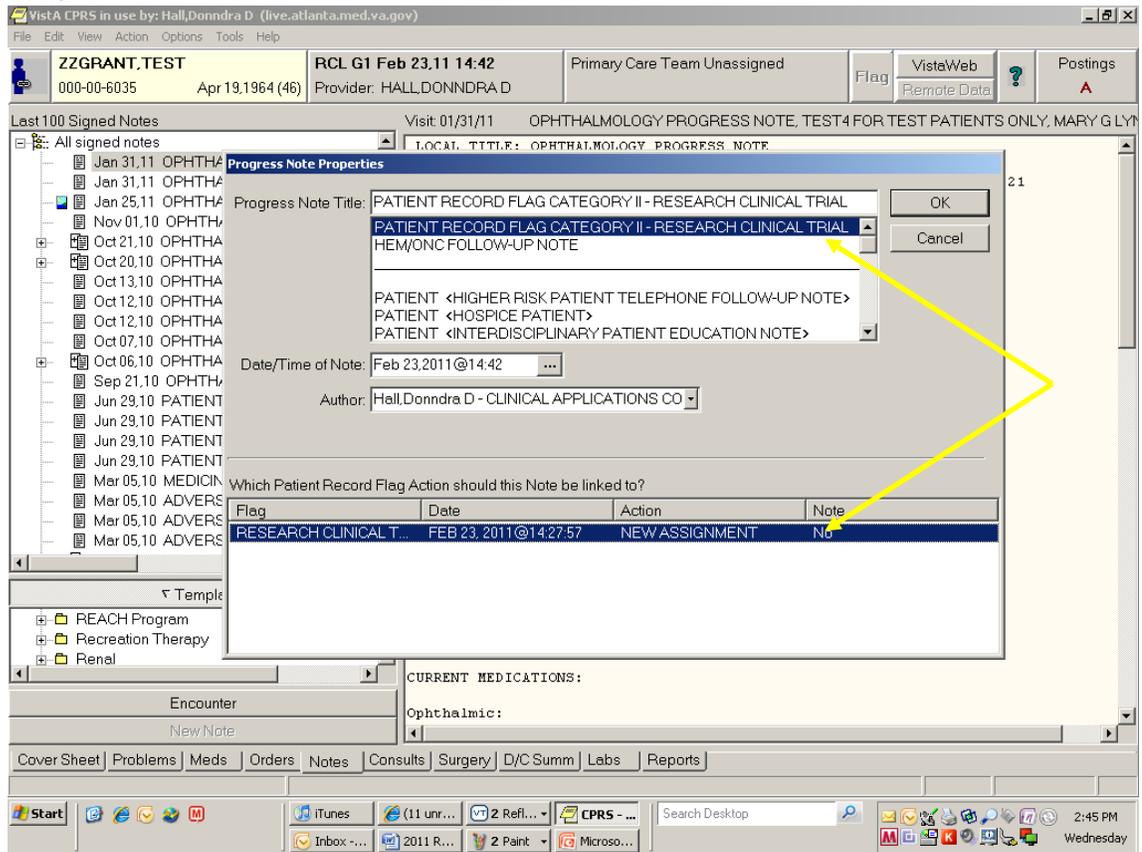
Historical Visit: a visit that occurred at some time in the past or at some other location (possibly non-VA) but is not used for workload credit.

Very Important!!!

Check the "Historical Visit" Box

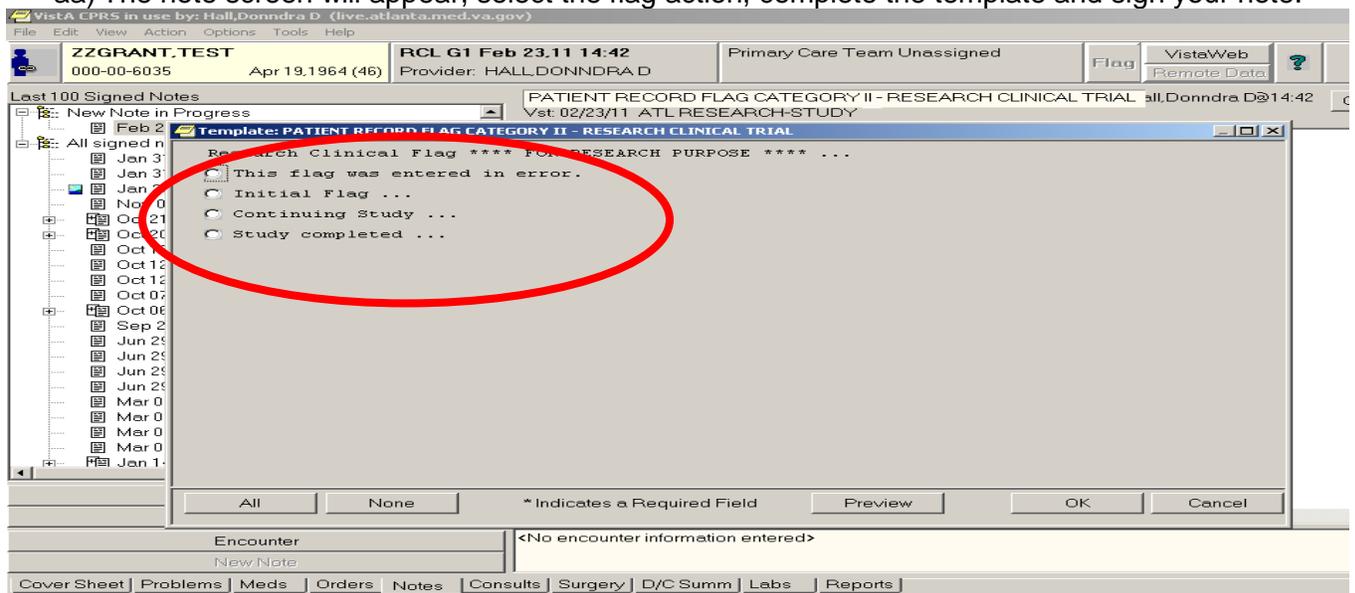
- s) Enter date and time and click on the “Historical Visit Box” then “ok”

t) Under the progress note title, enter: "Patient Record Flag Category II-Research Clinical Trial".



z) **Highlight the flag shown at the bottom part** (as shown in above picture) of the box and click "OK".

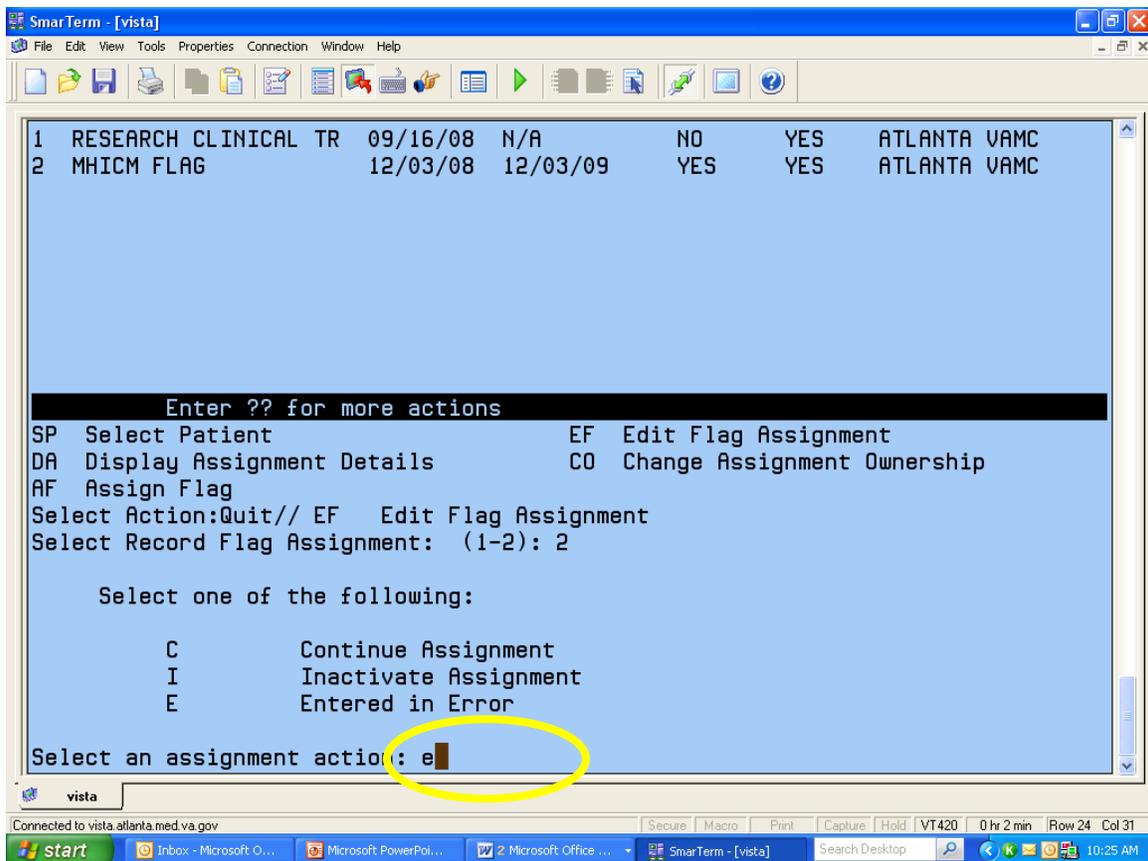
aa) The note screen will appear, select the flag action, complete the template and sign your note.



bb) The flag status will be automatically reviewed every 6 months.

Procedures to Remove and/or Edit the Research Flag

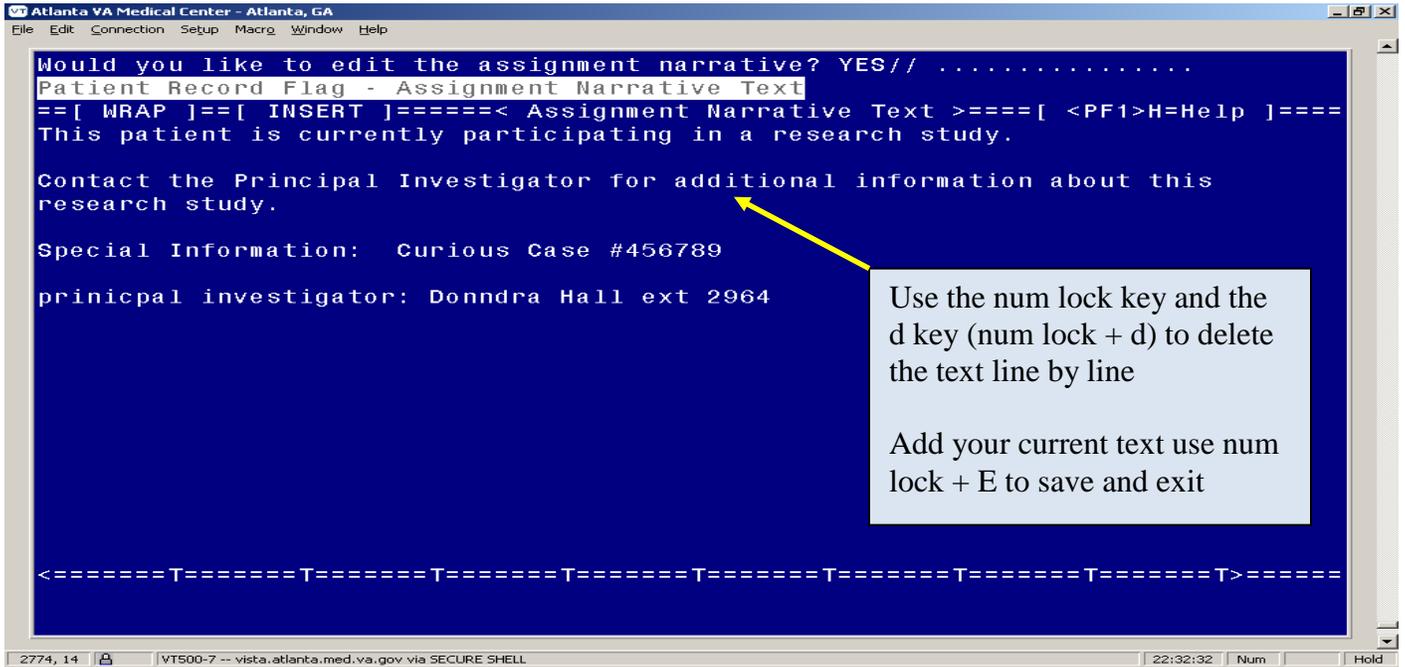
- a) Sign into **Vista**
- b) Enter **^FLAG** for menu options.
- c) Enter **FA** (Flag Assignment) at prompt.
- d) Enter **SP** to select patient.
- e) Enter the first letter of the patient's last name and last 4 digits of the patient's social security number.
- f) Enter **EF** (Edit Flag Assignment)
- g) On the screen, select the number for the "Research Clinical TR" flag you would need to edit (the patient may have more than one flag).



h) Select: "Continue Assignment" if renewing that flag, "Inactive Assignment" if discontinuing the flag" or "Entered in Error" if entered by mistake.

i) If you wish to continue the flag: You will need to hit **num lock + D** to **delete** current text and paste/copy the text you desire for "Drug Study Continues," "Investigational Device Continues" or

- l) Hit enter to “would you like to edit the narrative assignment narrative? YES//” (as shown above)
- m) For approved by, enter David Bower (Chief of Staff)
- n) The “Narrative Text” box with the **text previously** entered will appear on the screen



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Approved By: bower,david BOWER,DAVID JAMES DJB STAFF PHYSICIAN
111 STAFF PHYSICIAN

Enter the reason for editing this assignment:
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Patient Record Flag - Edit Reason Text
==[ WRAP ]==[ INSERT ]===== < Edit Reason Text >===== [ <PF1>H=Help ]=
The patient is partaking in yet another study
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Num lock + E to save and exit

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Enter Review Date: (2/24/2011 - 8/23/2011): 8/23/2011// (AUG 23, 2011)
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REVIEW OF EDIT FLAG ASSIGNMENT DATA INPUT BEFORE FILING
-----
Patient Name: ZZBROWN,TEST
Flag Name: RESEARCH CLINICAL TRIAL
Flag Type: CLINICAL
Flag Category: II (LOCAL)
Assignment Status: ACTIVE
Initial Assignment: 6/15/2010@13:56:32
Last Review Date: 8/16/2010
Next Review Date: 8/23/2011
Owner Site: ATLANTA VAMC
Originating Site: ATLANTA VAMC
Assignment Action: REACTIVATE
Action Date: 2/24/2011@12:00:40
Entered By: HALL,DONNDRA D
Approved By: BOWER,DAVID JAMES

Record Flag Assignment Narrative:
-----
This patient is currently participating in a research study.

Enter RETURN to continue or ^C to exit: █

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REVIEW OF EDIT FLAG ASSIGNMENT DATA INPUT BEFORE FILING
-----
Record Flag Assignment Narrative:
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Contact the Principal Investigator for additional information about this
research study.

Special Information: Curious Case #456789

prinicipal investigator: Donndra Hall ext 2964

Action Comments:
-----
The patient is partaking in yet another study

Do you want to review again? NO//

Would you like to file the assignment changes? YES//

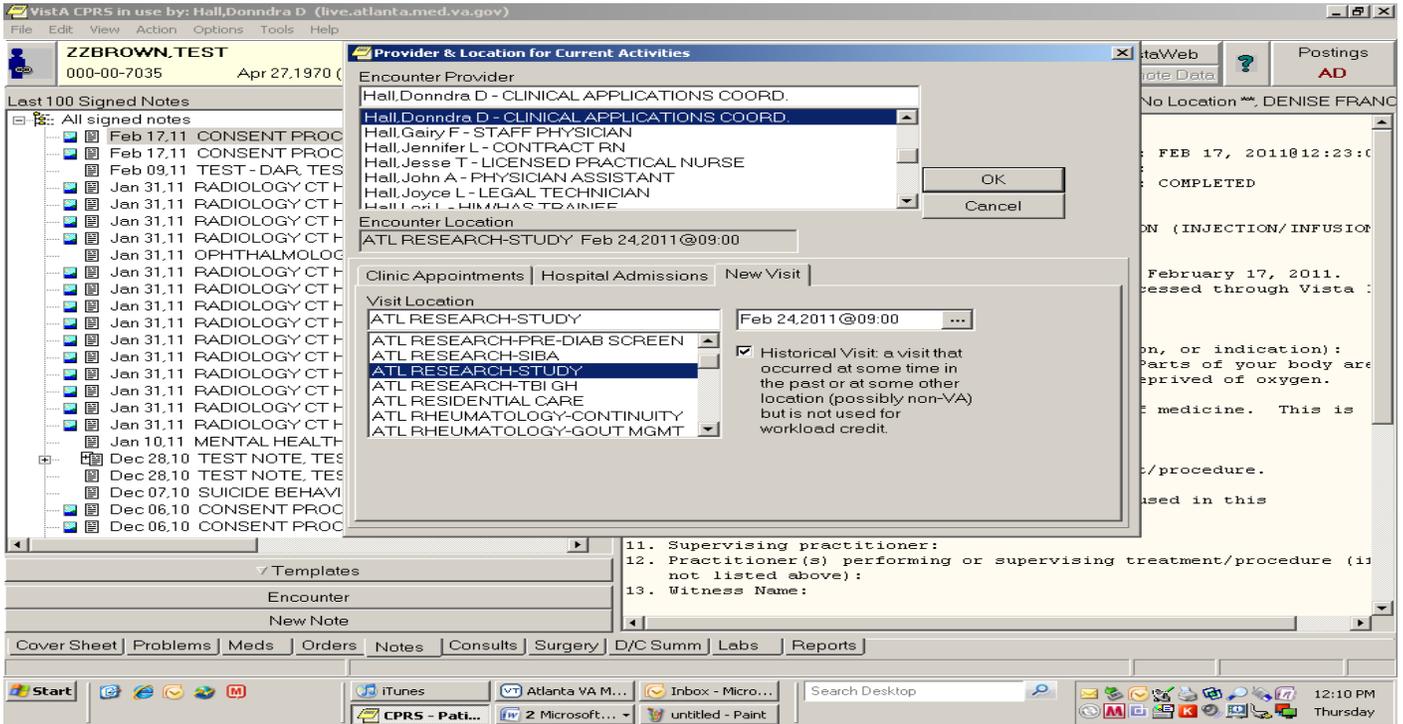
```

- o) You will be asked, "Do you want to review changes?" Select yes or no as appropriate.
- p) You will be asked "Would you like to file the assignment?" Select yes. Only select no if you wish to change the information you entered.
- q) Exit VISTA

Second Step (Not Needed For Flags "Entered In Error")

- a) Sign into CPRS

- b) Select patient name (Flag will NOT display if removed or inactivated). It will display if you choose to reactivate it.
- c) Go to the “Notes” tab, click on “New Note”, “New Visit”, click on the historical box, enter the date and time and click “OK”.
- d) Type in “Patient Record Flag” for note title, highlight the note as shown below and click “OK”.



Vista CPRS in use by: Hall,Donndra D. (live.atlanta.med.va.gov)

File Edit View Action Options Tools Help

ZZBROWN,TEST **RCL G1 Feb 24,11 09:00** Primary Care Team Unassigned **Flag** VistaWeb Postings
 000-00-7035 Apr 27,1970 (40) Provider: HALLDONNDRA D Remote Data ? AD

Last 100 Signed Notes

Progress Note Properties

Progress Note Title: PATIENT RECORD FLAG CATEGORY II - RESEARCH CLINICAL TRIAL
 HEM/ONC PROGRESS NOTE
 HEM/ONC TELEPHONE NOTE
 HEM/ONC CONSULT
 HEM/ONC BMT REFERRAL
 HEM/ONC RESEARCH
 PATIENT RECORD FLAG CATEGORY II - RESEARCH CLINICAL TRIAL
 HEM/ONC FOLLOW-UP NOTE

Date/Time of Note: Feb 24,2011@12:11
 Author: Hall,Donndra D - CLINICAL APPLICATIONS CO

Which Patient Record Flag Action should this Note be linked to?

Flag	Date	Action	Note
RESEARCH CLINICAL T...	JUN 15, 2010@13:56:32	NEW ASSIGNMENT	Yes
RESEARCH CLINICAL T...	AUG 16, 2010@09:59:48	INACTIVATE	Yes
RESEARCH CLINICAL T...	FEB 24, 2011@11:59:04	REACTIVATE	No

11. Supervising practitioner:
 12. Practitioner(s) performing or supervising treatment/procedure (if not listed above):
 13. Witness Name:

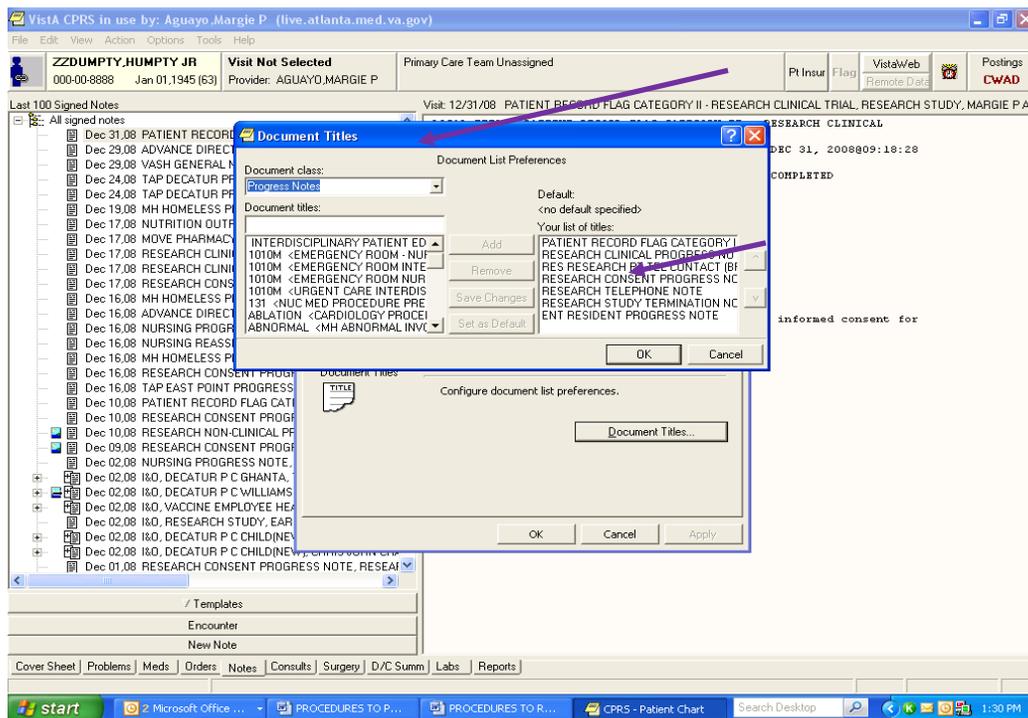
Cover Sheet | Problems | Meds | Orders | Notes | Consults | Surgery | D/C Summ | Labs | Reports

Start iTunes Atlanta VA M... Inbox - Micro... Search Desktop 12:11 PM Thursday

CPRS - Pati... 2 Microsoft... untitled - Paint

Procedures to set the “patient record flag category ii- research clinical trial” note as a preferred note title:

- a. Go to CPRS
- b. Click on “Tools”, then “Options”.
- c. In the Options box, select the notes tab and then the “Document Titles” box will pop up.
- d. The document class will be “Progress Notes”. Type the “PATIENT RECORD FLAG CATEGORY II-RESEARCH CLINICAL TRIAL” to select the note in the “Document Title” section, and then click ok



To finalize, click “OK” in the “Option” box.