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.
### Flag Table

<table>
<thead>
<tr>
<th>Flag</th>
<th>Assigned</th>
<th>Review Date</th>
<th>Active</th>
<th>Local</th>
<th>Owner Site</th>
</tr>
</thead>
<tbody>
<tr>
<td>PREGNANCY LACTATION</td>
<td>06/29/10</td>
<td>N/A</td>
<td>NO</td>
<td>YES</td>
<td>ATLANTA VAMC</td>
</tr>
<tr>
<td>MISSING PATIENT FLAG</td>
<td>06/29/10</td>
<td>N/A</td>
<td>NO</td>
<td>YES</td>
<td>ATLANTA VAMC</td>
</tr>
</tbody>
</table>

**Enter ?? for more actions**

- SP: Select Patient
- EF: Edit Flag Assignment
- DA: Display Assignment Details
- CO: Change Assignment Ownership
- AF: Assign Flag

**Search for a National Flag**

**Search for a Local Flag**

- RESEARCH CLINICAL TRIAL
- ACTIVE
- CLINICAL

**OK? Yes/No**

**h)** Hit enter at prompt “Enter Owner Site: Atlanta VAMC/”.

**i)** At the prompt “Approved by”, type: “Bower, David”, who is the Chief of Staff.

**Enter Owner Site: ATLANTA VAMC/ GA VAMC 508**

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

**j)** Then, the “Patient Record Flag-Assignment Narrative Text” box will appear.
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.

m) Hit enter at prompt “Enter Review Date”, then hit enter again to exit.

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

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.

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
“Clinical Intervention Continues” as appropriate or edit text as appropriate in the narrative text screen. Press “num lock + e” to save text changes and exit the narrative text box. This is a 2-step process and requires a note in CPRS as in the initial flag posting.

j) **If you wish to inactivate the flag**: You will need to hit num lock + D to delete current text and paste/copy the text you desire into the “Study Completed” narrative text screen. Press “num lock + e” to save text changes and exit the narrative text box. This is a 2-step process and requires a note in CPRS as in the initial flag posting.

k) **If you select Enter in error**: You will need to hit num lock + D to delete current text. Edit the flag assignment narrative to reflect the correction action taken. Press “num lock + e” to save text changes and exit the narrative text box. This is a one step process and does not require a note in CPRS.

Posting A Flag For A Patient That Previously Participated In Another Research Study And Now Has An “Inactivate Assignment”:

a) To assign a research flag for a different study, you need log into VISTA

b) Type: ^FLAG for menu options

c) At option “Record Flag Assignment”, select (FA) at the prompt

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.

f) Select: “EF/ Edit Flag Assignment” as the assignment action.

g) Select: R Reactivate Assignment
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

Use the num lock key and the d key (num lock + d) to delete the text line by line
Add your current text use num lock + E to save and exit

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

Enter the reason for editing this assignment:

The patient is partaking in yet another study

You will be asked, "Do you want to review changes?" Select yes or no as appropriate.

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.

Exit VISTA

Second Step (Not Needed For Flags “Entered In Error”)

a) Sign into CPRS

02/24/2015
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”.

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02/24/2015
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Complete and sign the note and exit CPRS.

Common Error Message:

Searching for a National Flag

Searching for a Local Flag

RESEARCH CLINICAL TRIAL ACTIVE CLINICAL

...OK? Yes/!

Unable to proceed with flag assignment...

Record flag is already assigned to patient

Enter RETURN to continue or '^' to exit:

You must follow the instructions for Posting A Flag For A Patient That Previously Participated In Another Research Study And Now Has An “Inactivate Assignment”: 
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.