



# Clinical Patient Management System (CPMS)

## User Guide

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## Typography

Items displayed in *italics* refer to pages, menus, blocks or field names, for example *CPMS Global Dashboard*, *User Settings* or *Name to be displayed*.

Items displayed in **bold** type refer to clickable/input actions, for example click **Save Changes**. type a **Description**.

[Cross-reference](#) items can be clicked to jump the section referred to.

The items in contents table can be clicked to jump the section referred to.

When viewing with Adobe document reader – click  to activate the contents bookmarks in the left panel.

## INTRODUCTION

The Clinical Patient Management System (CPMS) IT platform for clinical consultations between ERN members supports Health Professionals by facilitating collaboration with a network of experts across national borders of member states in Europe. It promotes improvements in the diagnosis and treatment of rare or low prevalence complex diseases within the EU. CPMS reporting tools allow users to generate reports of interest for administrative and clinical purposes.

The ERN-CPMS system is a secure Software as a Service (SaaS) that enables Health Professionals to enrol patients using comprehensive data models. Health professionals can use the ERN-CPMS to collaborate actively and share patient data within and across ERNs.

The ERN-CPMS is supported by Virtual Communication Tools and DICOM viewers to facilitate the interaction between clinicians.

**Note** The ERN-CPMS system may change as suggestions from our clinical advisors are incorporated, particularly in the area of interface and reporting.

## GETTING STARTED

### SUPPORTED BROWSERS

The ERN-CPMS system is a web-based application and is accessed using a web-browser. The latest versions of the following browsers are supported:

- Google Chrome – recommended for best experience of all ERN-CPMS system features.
- Mozilla Firefox
- Safari

JavaScript must be enabled in all browsers.

Private/incognito browsing modes should not be used when accessing the ERN-CPMS system.

See the [System Requirements](#) appendix below for details of all requirements.

- Notes** Use of the Safari browser is not recommended – users may experience problems when joining video meetings, sharing screens or with webinars.
- The browser version and other settings can be checked by using the Browser Information link in the Help & Support area at the bottom of the ERN-CPMS system page or go to [https://cpms.ern-net.eu/browser\\_information.html](https://cpms.ern-net.eu/browser_information.html).

### ERN-CPMS SUPPORT DESK

In case of any technical difficulty using the ERN-CPMS system, general queries or login problems, please contact the support team via email at [sante-ern-cpms-itsupport@ec.europa.eu](mailto:sante-ern-cpms-itsupport@ec.europa.eu).

Feedback, suggestions, or complaints can also be sent to the support team.

## ACCESS ERN-CPMS

Access to the ERN-CPMS system is strictly regulated to protect the data privacy rights of the patients.

An EU Login account is required for access to the system – the **click here** links on the *Login* page provide access to the EU Login site from where an account can be created, or authorisation to use the CPMS can be requested. See the EU Login guide for details – <https://ecas.ec.europa.eu/cas/help.html>.

Guest accounts with a Guest Virtual Centre within the ERN-CPMS can be requested by Network Coordinators – see the [ERN-CPMS Support Desk](#) section above for details.

A user's access to ERN-CPMS features is determined by their role within the System – see the [Roles and Rights](#) section of the Appendix for details – and the Centre and Network that they belong to.

## LOGIN TO ERN-CPMS

 <https://cpms.ern-net.eu>

In compliance with the guidelines published by The European Union Agency for Network and Information Security (ENISA), login to the ERN-CPMS system is protected by a Two-Factor Authentication mechanism.

1. Click **Login via EU Login** and provide a valid email address in the box provided.
  - o Follow the on-screen instructions to complete the first step of login authentication.
2. Select a **Verification method** for the second step of the authentication.
  - o Follow the on-screen instructions to complete the login process.

See the EU Login guide for details – <https://ecas.ec.europa.eu/cas/help.html>.

See the EU training video Getting Set-Up and Logged in to CPMS for more details – <https://webgate.ec.europa.eu/ern/imgs/CPMS%20Getting%20Started.mp4>.

## FIRST TIME LOGIN

The first time the user accesses the ERN-CPMS system they will be prompted to Accept the confirmation of the Professional Code of Conduct.

The user ERN preferences are set to None by default. It is recommended that the user updates the areas of interest as soon as possible after first logging in to ensure they are correctly available to other ERN users when setting up panels or scheduling meetings. See the [ERN Preferences](#) section below for more details.

## NON-EU USERS (TEST ONLY)

Users that do not have an EU Login profile and must login with a password.

1. Click the **To use non-eulogin users, click here (test only)** link below the Login via EU Login button to open the login page.
  - o Type the Username and Password in the boxes provided.
2. Click **Secure Login** to complete the login.

**Note** This feature is for test purposes only; please contact the support team for login details – see the [ERN-CPMS Support Desk](#) section above for details.

## NAVIGATING THE ERN-CPMS SYSTEM

A module within the ERN-CPMS system is a predefined set of security rules, dashboards, forms and reports created for a specific requirement. Each Centre or ERN within the ERN-CPMS is a separate module, ensuring the security and segregation of confidential patient data within the system.

The data for each Healthcare Provider using the system is isolated within a Centre. Users associated with a particular Centre cannot access the patient-identifying data for other Centres.

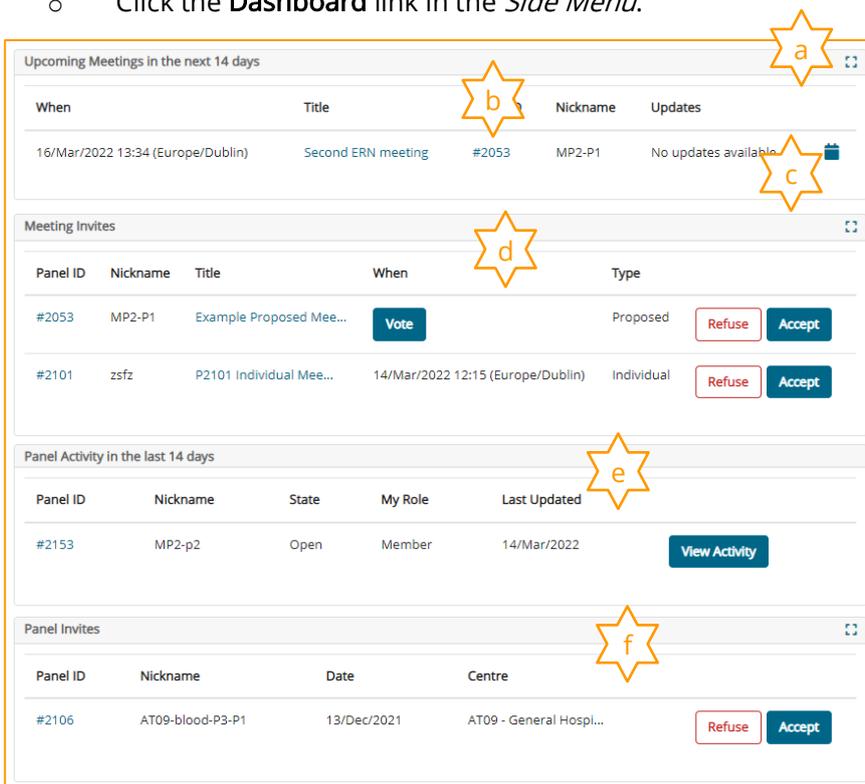
### THE CPMS GLOBAL DASHBOARD

After successfully logging in to the ERN-CPMS system the user will be brought to the *CPMS Global Dashboard*, from where they can access all the functionality of the ERN-CPMS system.

The *CPMS Global Dashboard* gives the user an overview of upcoming meetings, outstanding meeting or panel invitations and recent panel activity. It provides the user with immediate access to their active panels and meetings and options to instantly take action on panel or meeting invitations.

The blocks on the *CPMS Global Dashboard* include up to 10 rows of information on meeting and panels across all ERNs and Centres.

- 🔗 The user can return to the *CPMS Global Dashboard* at any time.
  - Click the **ERN logo** or **CPMS** link in the *Header Menu*.
  - Click the **Dashboard** link in the *Side Menu*.



The screenshot shows the CPMS Global Dashboard with several sections and callouts:

- a**: Callout pointing to the expand/collapse icon (two arrows) in the top right corner of the 'Upcoming Meetings in the next 14 days' block.
- b**: Callout pointing to a Panel ID (#2053) in the 'Upcoming Meetings in the next 14 days' table.
- c**: Callout pointing to a calendar icon in the 'Updates' column of the 'Upcoming Meetings in the next 14 days' table.
- d**: Callout pointing to a Panel ID (#2053) in the 'Meeting Invites' table.
- e**: Callout pointing to a 'View Activity' button in the 'Panel Activity in the last 14 days' table.
- f**: Callout pointing to a 'Refuse' button in the 'Panel Invites' table.

When	Title	Nickname	Updates
16/Mar/2022 13:34 (Europe/Dublin)	Second ERN meeting	#2053 MP2-P1	No updates available

Panel ID	Nickname	Title	When	Type
#2053	MP2-P1	Example Proposed Mee...		Proposed
#2101	zsfz	P2101 Individual Mee...	14/Mar/2022 12:15 (Europe/Dublin)	Individual

Panel ID	Nickname	State	My Role	Last Updated
#2153	MP2-p2	Open	Member	14/Mar/2022

Panel ID	Nickname	Date	Centre
#2106	AT09-blood-P3-P1	13/Dec/2021	AT09 - General Hospi...

Figure 1 - The CPMS Global Dashboard – see below for details.

- a. Click  to expand a block and view additional information.
- b. Click a **Panel ID** to go directly to the selected panel. See the [Working with a Panel](#) below for details.

- c. The *Upcoming Meetings in the next 14 days* block contains a summary of meeting scheduled within the next fortnight.
- o Click a **Meeting Title** to go directly to the selected meeting. See the [Participating in Meetings](#) below for more details.
  - o Click the  icon to download the iCal for the meeting; confirmation of the action may be required depending on the browser configuration. The iCal can be used to automatically update a local calendar.
- d. The *Meeting Invites* block contains a summary of meeting invitations awaiting action.
- o Click a **Meeting Title** to go directly to the selected meeting. See the [Participating in Meetings](#) below for more details.
  - o Click the **Vote** button to open the *Meeting Timeslot Selection* page. See the [Vote for a Proposed Meeting Time](#) below for more details.
  - o The **Refuse** or **Accept** buttons in the *Meeting Invites* block can be used to instantly respond to the selected invitation.
  - o If the invitation is Accepted the meeting will be moved to the *Upcoming Meetings* block.
- e. The *Panel Activity in the last 14 days* block contains a list of panels with actions taken in the last fortnight.
- o Click the **View Activity** button to view a summary of the panel activity.
- f. The *Panel Invites* block contains a summary of panel invitations awaiting action.
- o Click the **View Activity** button to view a summary of the panel activity.
  - o Use the **Refuse** or **Accept** buttons in the *Panel Invites* block to instantly respond to the selected invitation.
  - o If the invitation is Accepted, the Panel will be displayed in the *Panel Activity* block.
- Note** Additional blocks may be displayed on the *CPMS Global Dashboard*, and the layout may differ depending on the user's role within the system. See the [Roles and Rights](#) appendix for details.

## THE HEADER MENU

The *Header Menu* is shown on all pages within the ERN-CPMS system and provides quick navigation of the ERN-CPMS system features. The items shown will depend on the user's role within the system.

All of the items in the *Header Menu* are clickable – providing navigation to the Centre, ERN or Global *Dashboard* or to other features and applications.

-  Click the **ERN logo** or **CPMS** link in the *Header Menu* to return to the *CPMS Global Dashboard* at any time.



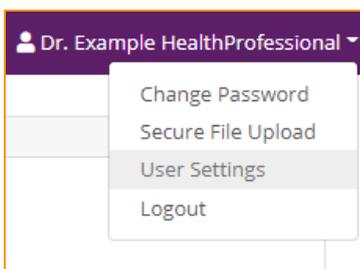
Figure 2 – The ERN-CPMS system Header Menu (from Centre with Patient selected) – see below for details.

- a. The currently selected module, Centre or ERN will be shown on the left of the bar and indicated by a highlighted text in the *Header Menu*.
  - o Click the **Centre** or **ERN** link to return to the *Centre/ERN Dashboard* at any time.
  - o Click the **ERN logo** or **CPMS** link to return to the *CPMS Global Dashboard* at any time.
- b. Occasionally, an Announcement banner will be displayed above the Header Menu to make essential service announcements.

- c. If the current user is enrolled in more than one Centre or ERN the drop-down menu can be used to select which Centre or ERN to work in.
- d. Click **Training** to open the ERN-CPMS Training module.
  - o The training pages open with the user guide (this document) displayed.
- e. Click **Help & Support** to access the *Help Menu* for quick access to Help and Support, Frequently Asked Questions and release documentation.
- f. The current user's name is shown at the top right of the *Header Menu*. Click the **user name** to open the *User Menu*, from where the user can change their password, upload a secure file, update the personal details and notification settings or log out of the system. See [The User Menu](#) section below for details.
- g. When working on the patient pages, an arrow is shown on the left of the *Context Banner*. Click the **↩ arrow** to return to the original page.
- h. The *Context Banner*, displayed below the *Header Menu*, contains details of the current activity and currently selected patient or Centre.

## THE USER MENU

The User Menu provides to the *User Settings* page and to *manual Logout*.



Depending on the user's profile, access to additional features and modules, such as Secure File Upload or Scheduled Reports will be available here. See the [Roles and Rights](#) appendix for details.

Figure 3 - The User Menu - see below for details.

A user's role or areas of interest can be updated as they change; see the [ERN Preferences](#) section below for details.

## CHANGE PASSWORD

In order to maintain security, it is recommended that passwords are changed regularly.

1. Click **user@centre** details in the *Header Menu* to open the *User Menu*.
2. Select **Change Password** to open the *Change your password* page.
3. Type the new **Password** in the box provided.
4. Type the same password in the **Password (again)** box.
5. Click **Set Password** to save the new password.
  - o Click **OK** to close the confirmation window.
  - o The user will be logged out and must use the new password to login again.

The following rules apply to passwords:

- They must be at least 10 characters long.
- They must contain at least one:
  - o lower case character, e.g., a-z
  - o upper case character, e.g, A-Z
  - o number, e.g, 0-9
  - o special character, e.g, !@#\$%^\*()\_+~{|[]&:"

- They must not be:
  - one of the last 10 passwords used.
  - similar to the user's first or last name.
  - similar to the user's login name or email address.

#### SECURE FILE UPLOAD

The Secure File Upload option in the user menu can be used to transfer files to the ERN-CPMS support team, when reporting issues with the ERN-CPMS system.

The Comment box should be used to provide details of the reason for uploading the file, for example, reference to a telephone call or support desk ticket number.

**Notes** Patient identifying sections in files are NOT removed during upload; please de-identify any files before uploading.

- Files uploaded are for the support of the ERN-CPMS system; any files uploaded will be deleted as soon as the associated issue has been resolved.

#### USER SETTINGS

The logged in user can view and update the personal details and notification.

1. Click the **username** to the right of the *Header Menu*.
2. Click **User Settings** in the drop-down menu to open the user's *Preferences* page.

See the [Preferences](#) section below for details.

#### LOGOUT

When the user is finished using the ERN-CPMS system, or is leaving the workstation unattended, they should log out of the system to prevent unauthorised access to patient information.

1. Click the **username** to the right of the *Header Menu*.
2. Click **Logout** in the drop-down menu.

## THE SIDE MENU

While working within the ERN-CPMS system, a navigation menu is displayed to the left of the screen.

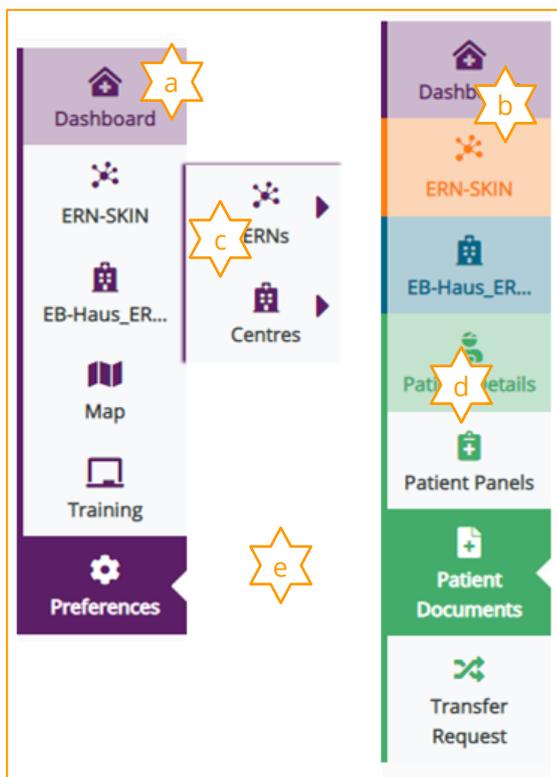


Figure 4 - Example Dashboard and Patient Side Menus - see below for details.

- a. The Dashboard option at the top of the Side Menu can be used to return to the *CPMS Global Dashboard*.
  - o All menu items can be clicked to open the selected page.
- b. The *Side Menu* can be used as visual guide to the user's location within the ERN-CPMS system.
  - o The menu items change colour to indicate that they have been selected.
- c. Occasionally a user may belong to more than one ERN or Centre; in this case an ► arrow will be displayed in the *Side Menu*.
  - o Click the menu option to choose from the available ERNs or Centres.
- d. The colour of the side bar, icons and items displayed in the *Side Menu* will vary depending on the user's current activity.
  - o In the examples shown, the side bar and selected items are dark purple when working on the *CPMS Global Dashboard* and are dark green while working with the Patient pages.
- e. The currently selected item is highlighted and indicated by a ◀ notch in the menu.
  - o The examples above show Preferences and Patient Documents selected.

**Notes** The options available in the *Side Menu* will vary depending on the user's location within the ERN-CPMS system.

- The user's role within a Centre or ERN also affects the options in the *Side Menu*. See the [Roles and Rights](#) appendix for details.

See below for the options available while working on the *CPMS Global Dashboard*.

See the [The ERN Side Menu](#), [The Centre Side Menu](#) and [The Patient Record Side Menu](#) sections below for details of the options appropriate to those modules.

## MAP

The Map option on the *CPMS Global Dashboard Side Menu* opens the European Commission | European Reference Networks search facility. This is external to the ERN-CPMS System; the user must use browser navigation to return to the *CPMS Global Dashboard*.

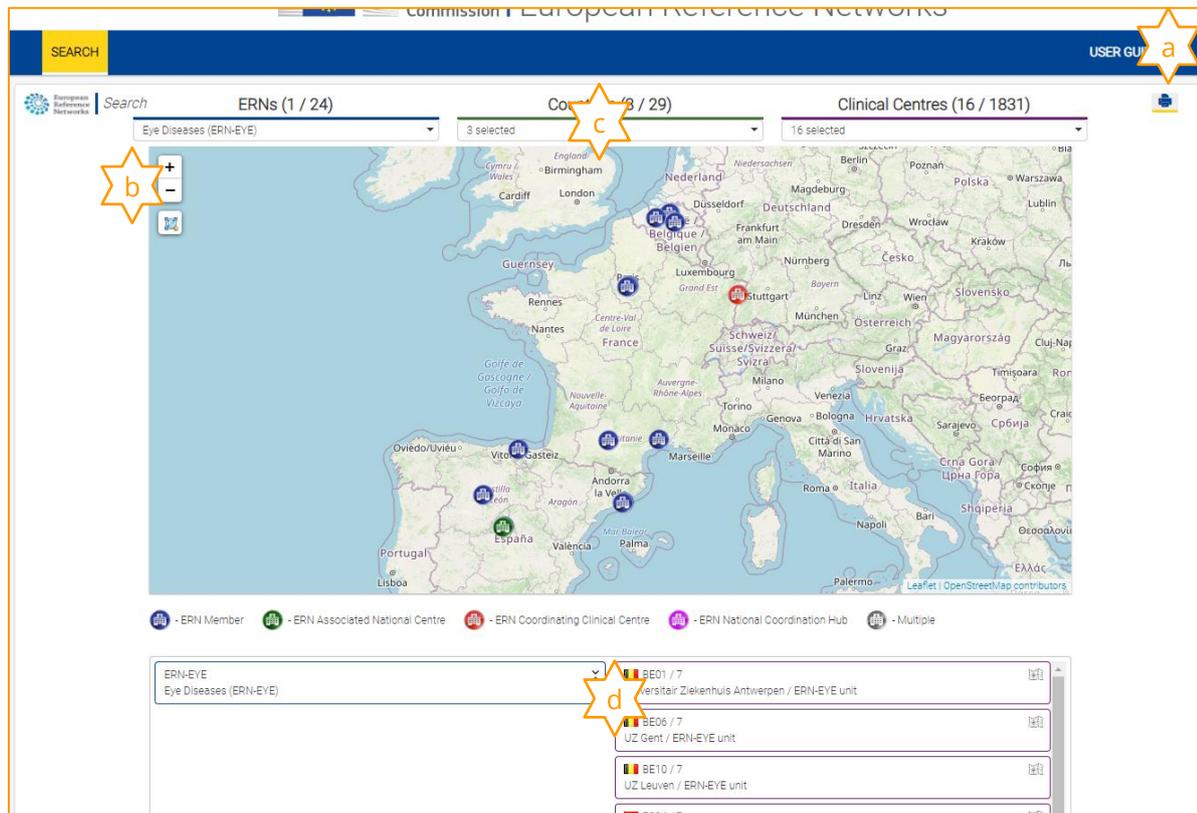


Figure 5 - ERN Map - with filters applied.

- A full user guide to the ERN Search tool is available on the map page.
- Use the **+** and **-** buttons to zoom the Map.
  - Click and drag to the map to focus on a specific location.
- Use the drop-down menus above the map to filter the list of HCPs displayed by ERN, Country and Centre.
- The selected ERNs and Centres are displayed below the map.
  - Click an item to view the ERN/Centre details.

**Note** Use the browser navigation to return to the *CPMS Global Dashboard*.

## TRAINING

The Training module provides access to the various reference and training documents and materials that detail the use of the ERN-CPMS system.

**Note** To facilitate the display of all reference and training material, the *Training* module is displayed without a *Side Menu*; click the **ERN logo** or **CPMS** link in the *Header Menu* to return to the *CPMS Global Dashboard*.

## USER GUIDES

By default, the Training module opens with this document displayed.

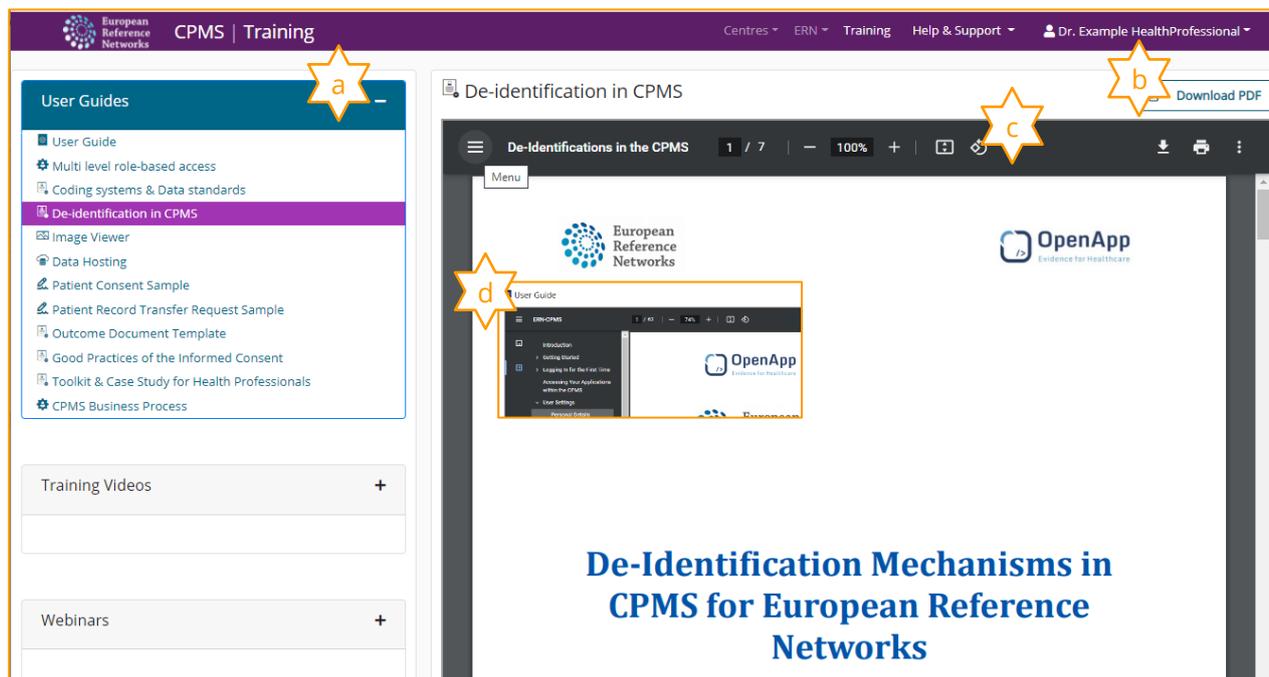


Figure 6 - The ERN-CPMS Training Module document viewer – see below for details

- a. Click **+** **–** to expand or close a block. Click an item the block to open the selected document.
- b. When viewing files in the User Guides block, the Download PDF button can be used to download the document for local reference.
- c. When viewing files in the User Guides block, the usual PDF viewing options are available to locate sections, resize and print the document.
- d. A number of the files in the User Guides block include a document outline to allow for easy location of specific information.
  - o Click **☰** to view the document outline
  - o Click the **➤** arrow to view the full section content; click the **▼** arrow to hide a section
  - o Click the highlighted Section title to jump to the selected Section.

**Note** The functionality of the PDF view will differ depending on the browser being used.

## TRAINING VIDEOS AND WEBINARS

Training videos provide short how-to demonstration of key tasks in the ERN-CPMS system; and webinars are recordings of ERN-CPMS system training sessions. They are displayed using a standard video player.

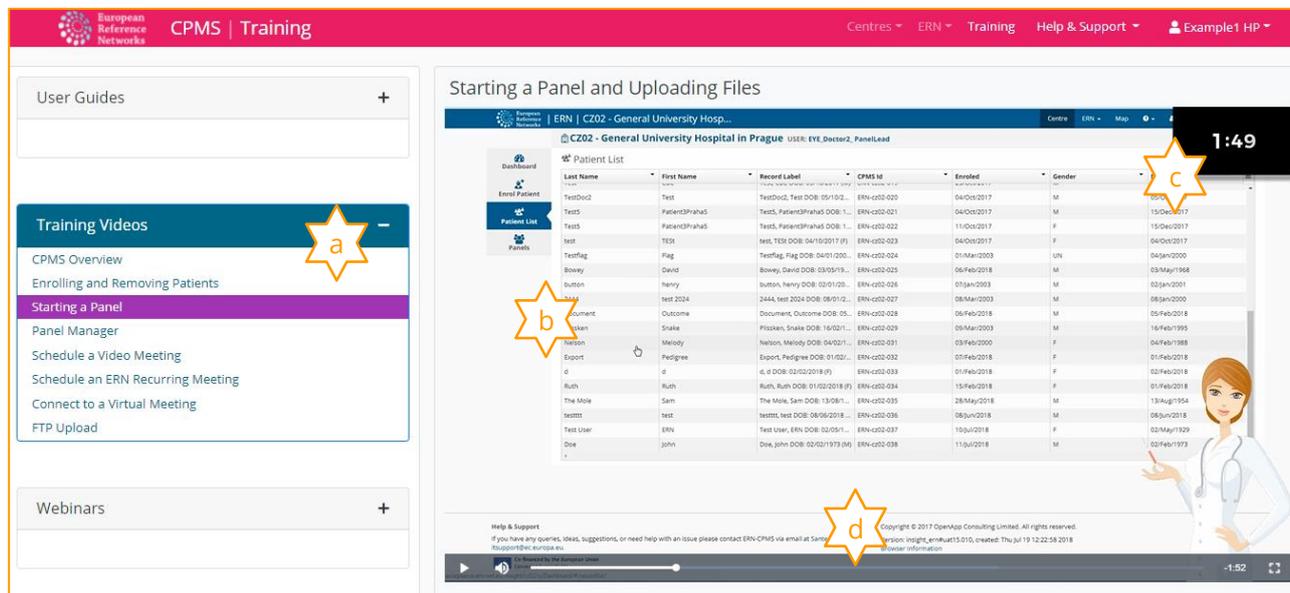


Figure 7 - The ERN-CPMS Training Module video viewer – see below for details.

- Click **+** **-** to expand or close a block. Click an item in the block to open the video or webinar.
- After loading, the video or webinar will automatically start playing.
- While viewing Training Videos, after the introduction is complete, the time remaining is displayed.
- The control bar at the bottom of the screen provides the following options:
  - Click **||** / **▶** Pause / Play the video.
  - Click **🔊** to adjust the volume.
  - Drag the **●** play indicator left to replay or right to skip forward.
  - The time remaining is indicated to the right of the play-bar.
  - Click **⌘** to play the video in full screen; click **⌘** to return to normal view.

**Note** The functionality of the video viewer may differ depending on the browser being used.

## PREFERENCES

The logged in user can view and update the personal details and notification preferences by:

- Clicking the **Preferences** option in the *Side Menu* on the *CPMS Global Dashboard*.
- Selecting **User Settings** from the *User Menu* in the *Header Menu*.

The *Preferences* page is organised into tabs; see below for a description of each one.

### PERSONAL DETAILS

The user's name, display name, phone number and email address may be updated at any time.

The login name cannot be updated by the user; the support team must be contacted if a new login name is required – see the [ERN-CPMS Support Desk](#) section above for details.

 Working on the *Preferences* page, click the **Personal Details** tab.

1. Make the required changes to the details.
2. Click **Save Changes** to update the user's profile.
  - o Click **OK** to confirm the changes.

**Notes** To facilitate the use of a nickname, the *Name to be displayed* is not automatically updated when the user's first, middle or last name are updated. The *Name to be displayed* must be updated separately.

- The *Email* address stored with the user's personal details is used by the ERN-CPMS system when sending panel notifications and does not change the user's login details. Users must contact the System Administrator to request a change to the email address associated with their login – see the [ERN-CPMS Support Desk](#) section above.
- All times displayed in the ERN-CPMS are shown in the time zone for the country associated with the user's profile. Users must contact the System Administrator to request a change to the country associated with their user profile – see the [ERN-CPMS Support Desk](#) section above.

### NOTIFICATIONS

Email notifications are sent by the ERN-CPMS system to alert the user to new panel invitations or meeting requests, when updates to a panel have been made and to remind the user of upcoming tasks and meetings.

Some of these notifications are mandatory. The optional notifications, the frequency of task reminders and the timing of meeting reminders can be configured to the user's preference.

 Working on the *Preferences* page, click the **Notifications** tab.

1. In the *Optional Notification* area, use the check boxes to turn specific notifications on or off.
  - o Email notifications are sent for all mandatory and selected optional events as soon as they occur.
2. In the *Task Reminders* area, select a frequency for the Tasklist Reminders Digest Email.
  - o No email is sent if there are no outstanding tasks.
3. In the *Meeting Reminders* area, select a time for the meeting reminder email.
4. Click **Save Changes** to update the notification preferences.
  - o Click **OK** to confirm the changes.

See also the [Email Notifications](#) section below for further details.

## OTHER DASHBOARDS

Dashboards are used in the ERN CPMS system to provide an overview of activity and tasks.

- The *ERN Dashboard* provides an overview of activities and tasks within the selected ERN.
- The *Centre Dashboard* provides an overview of the user's activity within the user's Centre (Healthcare Provider).

Dashboards are made up of blocks (sometimes referred to as widgets), which group the panel or patient data, according to type. For example, the *ERN Dashboard* displays blocks relating to meetings, and the *Centre Dashboard* displays blocks relating to Patient enrolment.

Each block shows the first 10 records in each type with a summary of the detail. Click  in the top right of the block heading to expand to show more records and view more details.

The blocks displayed in the dashboards may differ depending on the user's role.

See the [The ERN Dashboard](#) and [The Centre Dashboard](#) sections below for further details.

## GUEST USER (HEALTH PROFESSIONAL) ACCESS

As an occasional user, an external Health Professional may be given Guest access to the ERN-CPMS system to enrol patients and seek assistance. Unlike typical users in the ERN-CPMS system a Guest user does not belong to a Centre but is assigned to a private Guest Virtual Centre as their home Centre. Before accessing the ERN-CPMS system the user may be assigned Guest permission within their chosen ERN, if not they will be prompted to select an ERN when creating a Panel.

The *Side Menu* displayed on the *CPMS Global Dashboard* for the Guest user does not include an option to select a Centre. The ERN option is not available until the user has been assigned to an ERN. The Guest HP does not have full access to the ERN in which the Patient panel is created.

Access to the user's private Guest Virtual Centre is provided in the *Header Menu*.

The Guest Virtual Centre does not have a dashboard; the default page for the Guest Virtual Centre is the *Patient List* page. Guest users can enrol patients, view patients and participate in panels using the links in the Guest Virtual Centre *Side Menu*.

See the [Roles and Rights](#) appendix for full details of the Guest User permission with the ERN-CPMS system.

**Note** The Guest User should not be confused with a guest members within a Panel.

## FIND A PATIENT RECORD

Patient records are associated with a Centre. All users from the centre can see all patients enrolled within the centre regardless of enrolling user.

 Working on the *Centre Dashboard*, the *Search* block can be used to search for a patient based on their First or Last Name, Record Label, CPMS ID, Panel ID, or Panel nickname.

1. Enter text in the *Search* box and click the  search icon,
  - A list of patients matching the criteria entered will be displayed.
2. Click a **patient detail** row to open the *Patient Panels* page for the selected patient.

- 🔑 Working on the *Centre Dashboard*, click **Patient List** in the *Patients* block or *Side Menu* to open the *Patients List* page.
  - A list of all patients enrolled in the Centre is displayed.
  - The list can be filtered based on the patient's First or Last name, Record Label or CPMS ID to assist with locating a particular patient.
- 1. Enter text in the *Search* box provided and click the 🔍 search icon.
  - The list will be filtered to display a list of patients matching the criteria entered.
- 2. Click a **Patient detail** row to open the *Patient Panels* page for the selected patient.

## FIND A PANEL

Patient panels are associated with an ERN as well as a Centre and Patient.

Direct access to active Panels is provided from the *CPMS Global Dashboard* and *Centre Dashboard*.

The ERN or Centre *Panels* pages provide a list of all panels associated with the selected ERN or Centre.

- 🔑 Working on the *ERN* or *Centre Dashboard*, click **Panels** in the *Side Menu* to open the *Panel List* page.
  - A list of all panels associated with the ERN or Centre is displayed.
  - The list can be filtered based to assist with locating a particular panel.
- 1. Enter text in the *Search* box provided and click the 🔍 search icon.
  - The search is applied to all fields except the date Started.
  - The list will be filtered to display a list of patients matching the criteria entered.
- 2. Click a **Panel detail** row to open the *Patient Panels* page for the selected patient.

## WORKING WITH THE ERN-CPMS SYSTEM

### THE VIRTUAL COLLABORATION PROCESS

Once a patient is enrolled on the ERN-CPMS system, a panel is opened, and collaboration can take place.

The Panel workflow is fluid – allowing member invitations or document uploads and meetings at any time before the Outcome is signed off.

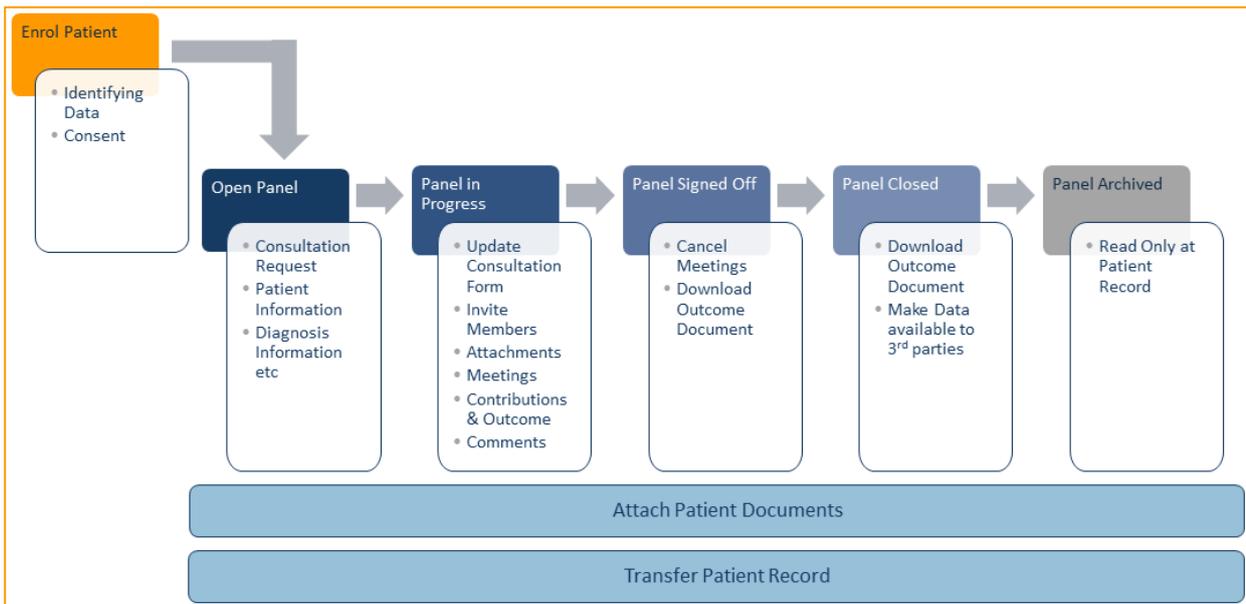


Figure 8 - The Virtual Collaboration Process (Panel Workflow).

Documents can be attached to the patient record, or the patient can be transferred at any time after enrolment.

Archived Panels are available for reference on the patient's record.

## ERN-CPMS PAGE STRUCTURE

Throughout the ERN-CPMS system, information pages can be accessed using the *Side Menu*. They provide a more detailed list of dashboard details, and are available while working with ERNS, Centres or Patients. The pages all use a similar format with options for filtering and sorting the data displayed.

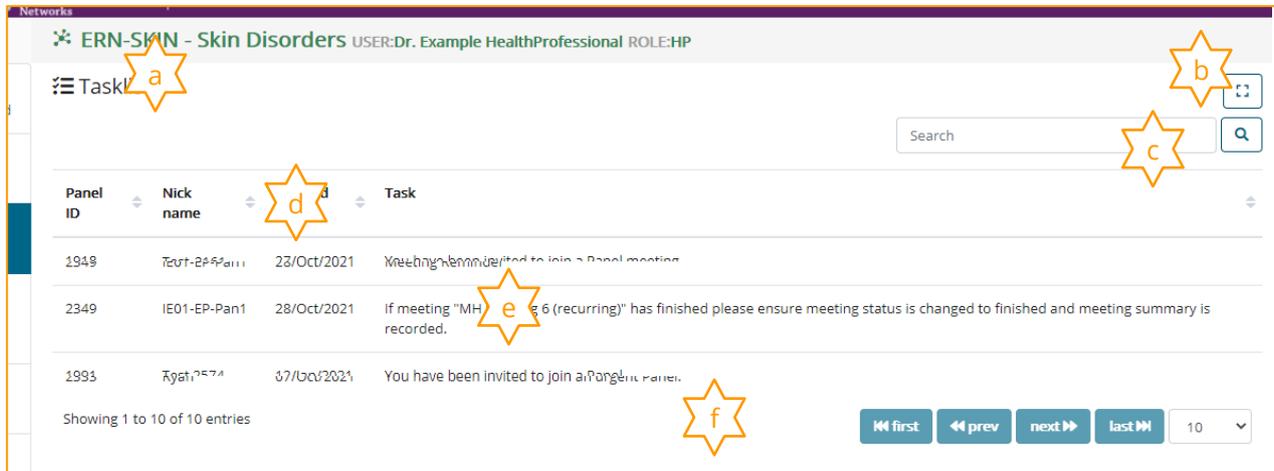


Figure 9 - Example ERN Tasklist page

- The page title is shown at the top left of the page.
- Click  to open the report in full screen mode; click to  return to the main page.
- Enter text in the box provided and click the  search to filter the list.
- The   buttons in the column header can be used to sort the page data.
- Click a **detail row** to open the selected record.
- By default, the page displays 10 rows at a time; pagination and navigation options are available at the bottom of the page.

In addition to the options above, ERN-CPMS pages may have other options:

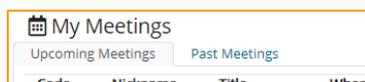
**Enrol Patient** Some pages include an action button, for example on the Centre and Patients pages there is an Enrol Patient button.



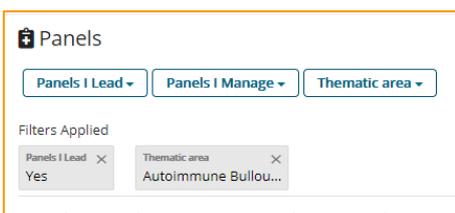
The **Download** button can be used to export the data from the ERN-CPMS page in .CSV format for use in MS Excel.



A **Menu** button may be displayed to the right of a details- the menu can be used to carry out actions on the selected item.



Some pages, for example, the ERN, My Meetings page, use tabs to separate list items by type. Click a **Tab** to move between lists.



The ERN, Panels list can be filtered using the drop-down menus at the top of the page.

- More than one filter can be selected.
- The filters applied are shown below the menu buttons.

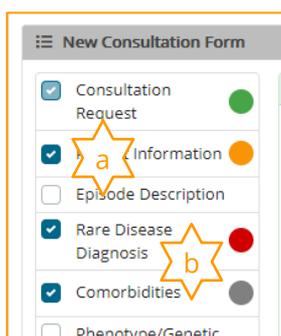
## ERN-CPMS CONSULTATION FORM

All recording of a patient's consultation details within the ERN-CPMS system is done using the *Consultation Form*.

The *Consultation Form* is made up of sections; sections can be added or removed as required by ticking the box to the left of the section title. Confirmation is required when removing a Section with data recorded.

See [The Consultation Form](#) section below for full details.

### THE SECTION SELECTOR



- The selected sections are indicated with a tick in the box to the left.
- The RAG indicator gives a visual indication of section completion. See the [Form and Section Validation](#) section below for details.

Figure 10 – The Consultation form section selector – see above for details.

### SAVE/CANCEL/CLOSE

Changes or new data must be saved to record the information in the system.

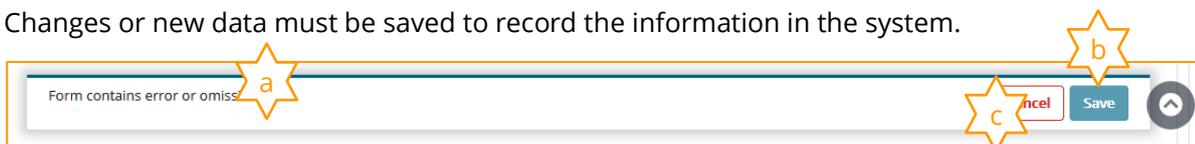


Figure 11 – Form Action Bar – see below for details

- The form will be flagged as missing data until all of the required data has been correctly entered. See the [Data Integrity](#) section below for details of data requirements.
- Use the **Save** button on the form to record the information.
- The **Cancel** button can be used to leave the form without saving the changes.
  - Confirmation of the action may be required.
  - The Cancel button will be replaced by a **Close** button when there are no changes on the Form to be saved.



- The Consultation Form includes a back-to-top button at the bottom of the page.
  - Click the ^ arrow to return to the top of the form.

**Note** It is recommended that users regularly use the **Save** button to ensure that data is not accidentally lost.

## DATA ENTRY

Throughout the ERN-CPMS system, data is entered using a variety of methods:

- Text boxes** allow the user to enter free text to describe a symptom, action, etc. Depending on the user's browser, spelling errors will be indicated.
- Drop-down lists** allow the user to scroll through a list – click an item in the list to select it.

- **Auto-complete selection lists** are used to allow the user to filter a long list – start typing the required text and click an item in the list to select it. The magnifier to the right of the field will open a *Data Picker* page where the user can browse the full range of options for selection.
- **Check boxes** allow the user to select more than one option from a list – click as many options as required to select them.
- **Radio buttons** allow the user to select a single option from a list – click an option to select it. The previous selection will be removed.
- **Date pickers** are used to select a date from a calendar. Most date fields also allow the user to type the date. Some date fields do not require an exact date, for example a month and year may be sufficient.
- **Repeating fields** allow for multiple entries of similar data to be recorded within a section or form. A button will be displayed in the form section to allow the first and multiple entries.



The **i** symbol may be displayed beside fields that require complex or specific data. Click the **i** symbol to view an explanation of the data requirements.

## PROGRESSIVE DISCLOSURE AND DYNAMIC FIELDS

Progressive disclosure is used within the Consultation form indicate the most important fields within a section of a form. Once this first field has been completed, additional (dynamic) fields are made available to complete the section.

## REPEATING DATA

Repeating data fields allow more than one entry per section on a form.

*Example:* Consultation Form - Episode Description - Main Symptoms.

## SUPPORTED TERMINOLOGY SYSTEMS

The following coding and terminology systems are used within the Consultation Form:

- ICD-10
- ORDO (Orphanet Rare Disease Ontology)
- ICC3 based on ICD-O-3
- HPO (Human Phenotype Ontology)
- LOINC
- MedDRA
- UCUM Codes
- ISO 3166-1
- HGNC
- EDQM standard terms
- NCBI genomic nucleotide RefSeq Id/LRG Id
- Eurostar classification for self-defined current economic status
- ISCED classification
- ATC (Anatomical Therapeutic Chemical)

## DATA INTEGRITY

The ERN-CPMS system uses Red/Amber/Green (RAG) colouring to indicate data validity and completion status on the *Encounter Form*.

All data on a form is checked and validated by the system as it is entered by the user. There are three particular checks carried out on the form.

The form data validation status will be indicated in the *action bar* at the bottom of the form.

The **Save** button for the form will not activate until all required data has been entered and is valid.

## REQUIRED/EXPECTED/OPTIONAL DATA

**Required data** fields (also referred to as mandatory or compulsory) must be entered before a form can be saved. A red asterisk (\*) is shown beside a field name to indicate that data must be entered in the field.

The form data status will change as sections are completed or edited.

The status of the form data will be indicated in the *Action Bar* at the bottom of the form and the **Save** button for the form will not activate until all required data has been entered.

**Expected data** fields are normally expected to be filled in, but the form can be saved if the fields are empty. An amber triangle (⚠) is shown beside the field name.

This will allow a user to save a form if they do not have sufficient information for a data field and it would be impractical to prevent the other data on the form being saved.

Empty or incomplete fields will not prevent the form being saved. The status of the form data will be indicated in the *Action Bar* at the bottom of the form and the **Save** button is active.

**Optional data** fields (also referred to as permitted or voluntary) do not have any completion requirement. No symbol is applied to these data fields. These data fields do not prevent the form being saved if they have not been filled.

Empty or incomplete fields will not prevent the form being saved. The **Save** button is active.

## DATA VALIDITY

When entering data on forms, the system compares the values entered with required values that are set within the ERN-CPMS system. These comparisons can be either “Hard Checks” or “Soft Checks”.

If there is an error when entering data, the system will display a message, describing the value that it did not expect and may ask for the correct value to be entered. The field will be highlighted with a coloured border.

Empty fields are treated in the same way as fields that contain data.

<b>Hard Check</b> <b>Red</b> <b>Validation Error</b>	<p>The field contains invalid data. Missing data for a required field is considered as invalid data by the system.</p> <p>The relevant field is highlighted in red and the RAG indicator on the section is set to red. The form cannot be saved until the error has been corrected.</p> <p>Required fields are treated as <i>invalid</i> if they are empty.</p>
<b>Soft</b> <b>Amber</b> <b>Validation Warning</b>	<p>The field contains unexpected data.</p> <p>The relevant field is highlighted in amber, and the RAG indicator on the section is set to amber. The entry in the field may be changed, or if the value is correct the form can be saved with the errors included.</p> <p>Expected and Optional fields are treated as <i>valid</i> if they are empty.</p>

## FORM AND SECTION VALIDATION

The ERN-CPMS system uses Red/Amber/Green (RAG) colouring to indicate the completion status of information in a section. The same colouring scheme is used throughout the ERN-CPMS system.

<b>Red Validation Error</b>	<p>Required but missing or invalid: required (mandatory) information in this section is required.</p> <p>The form cannot be saved until valid data has been entered in all fields on section.</p>
<b>Amber Validation Warning</b>	<p>Expected but missing: more information in this form or section is expected but has not been entered.</p> <p>The form can be saved but will be flagged to indicate that it is missing data.</p>
<b>Green Validation Success</b>	<p>Optional: all required information in this form or section has been entered.</p> <p>The form is saved and is flagged to indicate that all data has been entered and is valid.</p>

## THE CASCADING EFFECT (FIELD TO SECTION)

Within the ERN-CPMS system, the validation state of a Section is dependent on the fields in that Section. As the fields in a Section may have a mix of validation states, the Section validation state is determined by the most serious field validation error.

For example:

- If no data has been added to a Section, the Section border and heading and the indicator in the *Section Selector* will be Grey.
- If a Section contains any fields with a Red/Error validation state, the Section border and heading will be red and the indicator in the *Section Selector* will be Red/Error.
- If a Section contains no fields with a Red/Error validation state but one or more fields with an Amber/Warning validation state, the Section border and heading and the indicator in the *Section Selector* will be Amber/Warning.
- If a Section contains no completed fields with a Red/Error or Amber/Warning validation state the Section border and heading and the indicator in the *Section Selector* will be Green/Success.

## USER PERMISSIONS

The user's role within the Centre or ERN will affect what they can do when forming panels, working with a Panel or participating in meetings and elsewhere in the ERN-CPMS system.

What a Panel Lead or Member can do while working on a Panel will also differ depending on whether they are from the originating Centre (Healthcare Provider) or another Centre within the active ERN.

For these reasons, some of the actions described in this document may not be available to all users. Examples include:

- A Health Professional within a Centre can work with all panels in the Centre, whether they have been invited to participate or not, but cannot contribute to the outcome.
- A Health Professional within an ERN cannot view the clinical data for Panels they have not been invited to.

See the [Roles and Rights](#) appendix for details.

## WORKING WITH THE ERN PAGES

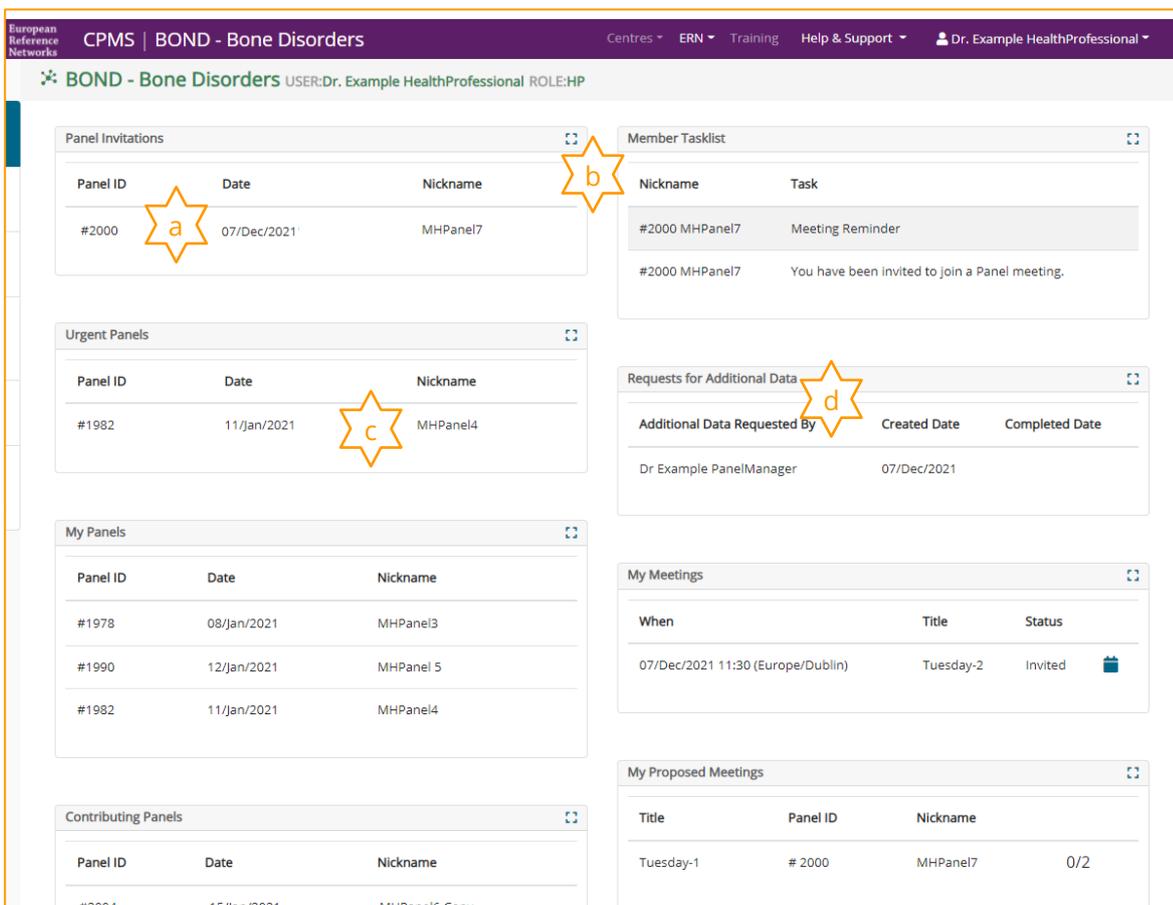
The ERN pages provide direct access to active Panels associated with the ERN. All ERN members can view all panels associated with the network but cannot access any patient-identifying information outside of their own Centre.

🔗 Working on the *CPMS Global Dashboard*, choose an **ERN** from the *Side Menu* to open the *ERN Dashboard* for the selected ERN.

## THE ERN DASHBOARD

The *ERN Dashboard* provides the user with an overview of their panel activity and tasks within the ERN.

All detail rows on the *ERN Dashboard* are clickable to open the associated patient panel or ERN page.



The screenshot shows the ERN Dashboard for BOND - Bone Disorders. The dashboard is divided into several sections:

- Panel Invitations:** A table with columns Panel ID, Date, and Nickname. A row is highlighted with annotation 'a'. An expand icon is in the top right with annotation 'b'.
- Member Tasklist:** A table with columns Nickname and Task. It shows a meeting reminder and an invitation to join a panel meeting.
- Urgent Panels:** A table with columns Panel ID, Date, and Nickname. A row is highlighted with annotation 'c'.
- Requests for Additional Data:** A table with columns Additional Data Requested By, Created Date, and Completed Date. A row is highlighted with annotation 'd'.
- My Panels:** A table with columns Panel ID, Date, and Nickname. It lists several panels.
- My Meetings:** A table with columns When, Title, and Status. It shows a meeting on 07/Dec/2021.
- Contributing Panels:** A table with columns Panel ID, Date, and Nickname. It lists contributing panels.

Figure 12 - The ERN Dashboard – see below for details.

- Each block displays a list of panels, meetings, tasks or requests that require attention.
  - Depending on the user's role in the ERN, additional blocks may be available, e.g., Request Inbox, Transfer Requests, Panels Managed.
- Click  in the top right of the block heading to expand and view more details.
- Click a **detail row** to open the associated panel or meeting.
- Requests for assistance when forming a panel, Additional Data Requests, and Timeline Tasks (Actions) are displayed in the Requests for Additional Data section of the ERN dashboard.

## THE ERN SIDE MENU

While working within the *ERN Dashboard* and its associated pages, e.g., after selecting a panel to work on, the menu displayed on the left of the screen provides access to ERN related features.

Depending on the user's role within the ERN, additional items may be available within the *ERN Side Menu*.



- a. The *Side Menu* displayed to all users within the ERN.
  - o Click **Dashboard** to return to the *CPMS Global Dashboard*.
- b. The currently selected ERN is highlighted – click the ERN title to return to the *ERN Dashboard*.
- c. The currently selected page is highlighted and indicated by a ◀ notch in the menu.
- d. Additional items will be available to the ERN Coordinator.

The ERN side menu is displayed in orange.

Figure 13 - The ERN Side Menu – see above for details.

## ERN PANELS

Details of panels in which the user is either the Panel Lead, Panel Manager or a participating member are displayed in the blocks on the *ERN Dashboard*.

The *Panel Invitations*, *Urgent Panels*, *My Panels*, *Contributing Panels* and *ERN Panels Managed* blocks display the first 10 of the user's active panels. All detail rows in the blocks are clickable to open the associated patient panel.

Click  in the top right of the block heading to expand and view additional panels that may be active. The expanded list includes details of the Panel Lead, thematic area and status.

The ERN *Panels* page provides a report of all active panels for the ERN with options to filter and search.

 Working on the *ERN Dashboard* for the selected ERN.

1. Click a **detail row** to open the selected panel.
  - o See the [Working with a Panel](#) section below for further details.

OR

1. Click **Panels** in the *Side Menu* to open the ERN *Panels* page.
  - o Use the **filter** drop-downs and **search** at the top of the page to refine the list.
2. Click a **detail row** to open the selected panel.
  - o See the [Working with a Panel](#) section below for further details.

## ERN TASKLIST

Tasks include responding to panel or meeting invitations, requests for additional data, and meeting reminders. Depending on the user's role additional tasks may be displayed.

Once completed, the task will be removed from the ERN Tasklist.

Tasks will be automatically removed or updated as the panel workflow progresses.

Examples of task and actions include:

<p><b>You have been invited to participate in a Panel.</b></p>	<p>Use the <b>Accept</b> or <b>Refuse</b> button in the <i>Panel Banner</i> to complete the task.</p>
<p><b>Please choose a preferred time to join a Panel meeting.</b></p>	<p>Use the <b>Vote</b> button in the <i>Panel Banner</i> to complete the task.</p>

The task notifications will differ depending on the user's role within the Panel.

Tasks assigned to the user can be accessed in three places – see the sections below for details.

 Working on the *ERN Dashboard* for the selected ERN.

### THE MEMBER TASKLIST BLOCK

The *Member Tasklist* block displays the first 10 tasks awaiting the user's action.

Tasks are displayed in the *Member Tasklist* block by date – with the oldest at the top.

Click  in the top right of the block heading to expand and view any additional tasks that may be awaiting action. The expanded list includes the date the task was assigned.

1. Click a **detail row** to open the selected panel and take the action.
  - o See the [Working with a Panel](#) section below for further details.

### THE TASKLIST PAGE

The *Tasklist* page displays all tasks assigned to the user. The details on the page can be sorted and filtered (searched) to assist on locating specific tasks.

1. Click **Tasklist** in the *Side Menu* to open the *Tasklist* page.
  - o The details of all tasks assigned to the user are displayed.
  - o Enter text in the box provided and click the  search to filter the list.
  - o Use the   to change the order of the details on the page.
2. Click a **detail row** to open the selected panel and take the action.
  - o See the [Working with a Panel](#) section below for further details.

## EMAIL NOTIFICATIONS

Email notifications are sent to the user at various times during the lifecycle of a panel. In most cases, a corresponding task will be displayed in the user's *ERN Tasklist* and in the Notifications area of the *Panel Banner*.

A digest email is sent, with details of panels the user is leading, upcoming meetings and any outstanding tasks to be completed. No email is sent if there are no outstanding tasks. The digest email may be received daily, weekly fortnightly, or monthly. See the [User Settings](#) section above for details.

Notification from Urgent panels are sent immediately, rather than waiting for the digest email.

As with the *ERN Tasklist*, the email notifications received will differ depending on the user's role within the Panel.

The emails are sent from the ERN-CPMS system email address *ern@ern-live-pri.cpms.ern-net.eu* and should not be replied to. Queries related to the email should be sent to ERN CPMS support team – see the [ERN-CPMS Support Desk](#) section above for details.

The subject line of the email will include the prefix "CPMS:" to help identification in the Inbox.

Some of the emails contain a link to the ERN-CPMS system login page. The meetings invitation and time proposal emails contain a link to accept the invitation or vote for a meeting time without logging in.

Examples include:

CPMS: You have been invited to participate in an Urgent Panel – this notification will be displayed in both the *ERN Tasklist* and *Panel Banner*.

CPMS: A Panel Member has mentioned you in a Comment – this notification will not be displayed in either the *ERN Tasklist* or *Panel Banner*.

CPMS: You are Invited to a Panel Meeting – this notification will be displayed in the both the *ERN Tasklist* and *Panel Banner*. The email contains a link to the *Meeting Invitation*, where the user can accept or reject the invitation without logging.

## ERN MEETINGS

Details of the user's meetings can be accessed in two places:

- Details of all upcoming meetings are available through the *ERN Dashboard*.
- The *ERN My Meetings* page provides tabs to access to all upcoming and to review all past meetings.

 Working on the *ERN Dashboard* for the selected ERN.

## THE MY MEETINGS BLOCK

The first 10 upcoming meetings, for all panels, are shown in the *My Meetings* block of the ERN *Dashboard*.

Click  in the top right of the block heading to expand and view details of any additional upcoming meetings. The expanded list includes the date that the task was assigned.

Click the  calendar icon to download the iCal details of the meeting for upload to an external calendar. Confirmation of the action may be required depending on the browser configuration.

1. Click a **detail row** to open the *My Meeting* details page.
  - o See the [The My Meetings Page](#) section below for further details.

## THE MY PROPOSED MEETINGS BLOCK

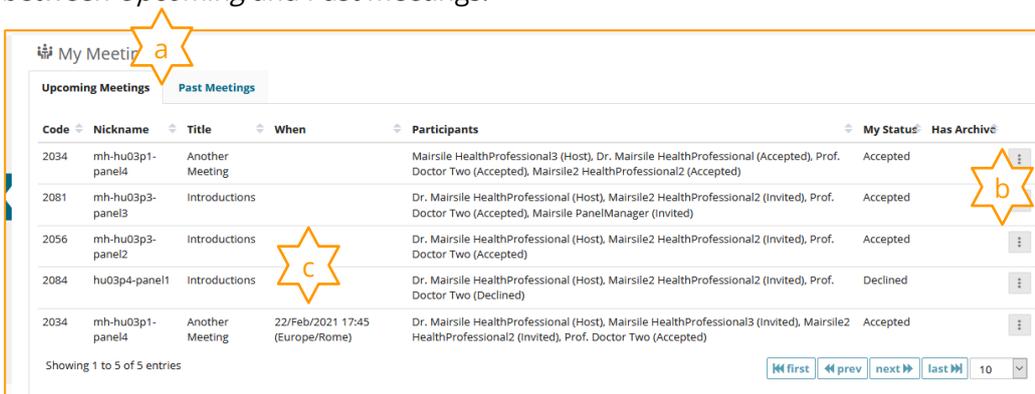
The timeslot voting status for the user's proposed meetings is indicated in a block on the *ERN Dashboard*.

A meeting time for proposed meetings must be confirmed to make the meeting active and allow participants to join. The meeting time can be confirmed by the host before all invitees have voted.

1. Click a **detail row** to open the *Timeslot Confirmation* page for the selected meeting.
  - o The time zone for the meeting will be displayed.
  - o The invitation status and choices of meeting participants will be displayed.
2. Click an **option** to confirm the meeting time.
  - o Only one timeslot can be selected.
3. Click the **Confirm** button to set the meeting time.
  - o The proposed meeting is saved as a new individual meeting with the confirmed time and will be displayed in the *My Meetings* block on the *ERN Dashboard* for all invitees.

## THE MY MEETINGS PAGE

Details all of the user's meetings are available on the ERN *My Meetings* page. Tabs are used to switch between *Upcoming* and *Past* meetings.



The screenshot shows the 'My Meetings' page with two tabs: 'Upcoming Meetings' (active) and 'Past Meetings'. The table below lists several meetings with columns for Code, Nickname, Title, When, Participants, My Status, and Has Archive. Callout 'a' points to the tabs, 'b' points to a menu icon in the 'Has Archive' column, and 'c' points to the 'When' column for a meeting that is currently empty.

Code	Nickname	Title	When	Participants	My Status	Has Archive
2034	mh-hu03p1-panel4	Another Meeting		Mairsile HealthProfessional3 (Host), Dr. Mairsile HealthProfessional (Accepted), Prof. Doctor Two (Accepted), Mairsile2 HealthProfessional2 (Accepted)	Accepted	
2081	mh-hu03p3-panel3	Introductions		Dr. Mairsile HealthProfessional (Host), Mairsile2 HealthProfessional2 (Invited), Prof. Doctor Two (Accepted), Mairsile PanelManager (Invited)	Accepted	
2056	mh-hu03p3-panel2	Introductions		Dr. Mairsile HealthProfessional (Host), Mairsile2 HealthProfessional2 (Invited), Prof. Doctor Two (Accepted)	Accepted	
2084	hu03p4-panel1	Introductions		Dr. Mairsile HealthProfessional (Host), Mairsile2 HealthProfessional2 (Invited), Prof. Doctor Two (Declined)	Declined	
2034	mh-hu03p1-panel4	Another Meeting	22/Feb/2021 17:45 (Europe/Rome)	Dr. Mairsile HealthProfessional (Host), Mairsile HealthProfessional3 (Invited), Mairsile2 HealthProfessional2 (Invited), Prof. Doctor Two (Accepted)	Accepted	

Showing 1 to 5 of 5 entries

Navigation:     10

Figure 14 - The ERN My Meetings Page

- a. The tabs at the top of the page can be used to switch between upcoming and past meetings.
- b. The  menu button provides access to meeting actions.
- c. For proposed meetings, the date and time will not be displayed until participants have voted and the meeting host has confirmed the choice.

📌 Working on the *ERN Dashboard* for the selected ERN.

1. Click **Meetings** in the *Side Menu* to open the *Meetings* page.
  - The *Meetings* page opens with the *Upcoming Meetings* tab open.
2. Click a **detail row** to open the selected *Meeting* details page.
  - See the [Participating in Meetings](#) section below for further details.
3. Click the **⋮** menu button to the right of the meeting details to:
  - Open the main *Panel* page.
  - Change the Status of the meeting invitation. (Upcoming only)
  - Download the iCal details of the meeting for upload to an external calendar; confirmation of the action may be required depending on the browser configuration. The iCal can be used to automatically update a local calendar. (Upcoming meetings only.)

## ERN WEBINARS

Webinars are used for education and training purposes and are specific to the ERN in which they were created. Similar to meetings, they are scheduled by the host, but no invitations are issued; all members of the ERN can join a live webinar or view recorded webinars.

A webinar differs from a meeting in that only the presenters screen is shared; participants cannot contribute or share their own screen.

All ERN members can schedule new Live webinars and upload a webinar using an MP4 recording from an external source.

- 📌 Working on the *ERN Dashboard* for the selected ERN, click **Webinars** in the *Side Menu*.
- The details of all panel webinars are displayed on the *Webinars* page.
  - Tabs are used to switch between the Planned and Recorded webinars.
  - The *Webinars* page opens with the *Planned* webinars tab open.

## SCHEDULE A WEBINAR

1. Click the **Schedule Webinar** button in the top bar.
2. Type a **Title** for the webinar in the box provided.
3. Type a brief **Description** of the webinar in the box provided.
4. Type the name of the **Presenter**.
  - This will usually be the name of the user creating the webinar but may be different in the case of a hosted webinar.
5. Select a **date, time** and **duration** for the webinar.
6. Click **Schedule Webinar** to save the webinar details.
  - Click **OK** to confirm the action and return to the *Planned Webinars* page.

## UPLOAD A RECORDED WEBINAR

1. Click the **Recorded** tab to open the *Recorded Webinars* page.
2. Click the **Upload Recording** button in the top bar.
3. Type a **Title** for the webinar in the box provided.
4. Type a brief **Description** of the webinar in the box provided.
5. Type the name of the **Presenter**.
  - o This will usually be the name of the user creating the webinar but may be different in the case of a hosted webinar.
6. Click the **Choose file** button to open the file browser and select the recording.
  - o The selected file name will be displayed.
7. Click **Upload Webinar** to upload the file and save the webinar details.
  - o Depending on the duration of the recording, the upload may take a few minutes.
  - o Click **OK** to confirm the action and return to the *Planned Webinars* page.

**Notes** Recordings made in portrait mode should be rotated before being uploaded to the ERN System.

- Upload problems may be experienced with files larger than 12Mb – it is recommended that such files are broken into shorter sections.

## EDIT A WEBINAR

1. Click the **⋮** menu button to the right of the webinar details and select **Edit** to open the webinar details page.
2. Change the webinar details as required.
  - o The uploaded recording can be replaced using the **Upload file** button.
3. Click **Save Changes** to save the updated webinar details.
  - o Click **OK** to confirm the action and return to the *Planned Webinars* page.

## DELETE A WEBINAR

1. Click the **⋮** menu button to the right of the webinar details and select **Edit** to open the webinar details page.
2. Click **Delete** to start deleting the webinar.
3. Click **OK** to confirm the deletion.
  - o Click **OK** to complete the action and return to the *Planned Webinars* page.

## STARTING OR JOINING A WEBINAR

The user that created the webinar can **Start** the webinar as the scheduled time approaches. Other users may **Join** the webinar once it has started.

**Note** It is recommended that users test the video and sound before joining or starting a Webinar by using the **Test Video** link provided.

1. Click a **detail row** to open the Webinar details page.
  - o The webinar details will be displayed.
  - o A Test Video link and a countdown to the broadcast time will be displayed.
  - o The countdown timer will become active 5 minutes before the webinar start time and can be used to start or join the webinar early.
  - o If the start time has passed, a Start Webinar or a Join Webinar button will be displayed in place of the countdown timer.

2. As presenter, click the **countdown timer** or **Start webinar** button to start the presentation.
  - o The Webinar opens in a new browser tab
  - o The presenter's tool bar includes options to start or stop video or audio and to share the screen.
3. Click the red **Leave** button to finish the broadcast and return to the Webinar details page.
  - o A recording of the webinar is automatically made and will be available in the Recorded webinars area shortly after the webinar has ended.

OR

2. As participant, click the **countdown timer** or **Join webinar** button to view the broadcast.
  - o The Webinar opens in a window at the bottom of the ERN-System page.
  - o A message will be displayed if the presenter has not started the webinar.
3. Click the red **leave** button to leave the webinar and return to the Webinar details page.

**Note** The webinar toolbar and functions are similar to those for meetings. See the [Join a Meeting](#) section below for details.

## VIEWING RECORDED WEBINARS

All past and uploaded webinars can be viewed from the *Recorded* tab on the ERN *Webinars* page.

1. Click a **detail row** to view the recorded webinar.
  - o The webinar viewer will open and automatically start playing the recording.
  - o A toolbar with options to control the progress, volume and screen size is shown below the recording.
2. Click **Close** to stop viewing the recording and return to the *Planned Webinars* page.

## ERN PREFERENCES

As a user's role or areas of interest within the ERN change, their preferences should be updated.

1. Working on the *ERN Dashboard*, click **ERN Preferences** in the *Side Menu* to open the user's *ERN Preferences* page.
2. Make the required changes.
  - o Tick/Untick the boxes to the right of the Thematic Areas of interest to identify the users areas of interest.
3. Click **Update ERN Preferences** to save the changes,
  - o Click **OK** to confirm the action.

**Note** It important that this information is kept up to date to ensure that the user is listed correctly when inviting participants to panels and meetings.

## PANEL MANAGEMENT (COORDINATOR)

The *Panel Management* page lists all Open and signed off panels for the ERN. The page provides the ERN Coordinator with direct access to panels and the option to assign a Panel Manager.

- 🔗 Working on the ERN *Dashboard*, click **Panel Management** in the *Side Menu* to open the ERN *Panels* page.
  - Use the **filter** drop-downs and **search** at the top of the page to refine the list.
  - Click a **detail row** to open the selected panel.
    - See the [Working with a Panel](#) section below for further details.

## ASSIGN PANEL MANAGER

A Panel Manager from the Patient's enrolling Centre may be assigned by the Panel Lead from the *Consultation Form*. The ERN Coordinator can assign Panel Manager from outside of the patient's Enrolling Centre.

1. Click the **⋮ menu** to right of the panel details and select **Assign Panel Manager** to open the *Assign Panel Manager* form.
  - If a Panel Manager is currently assigned, the name of Panel Manager will be displayed.
2. Use the **Panel Manager** drop-down to select a Panel Manager.
  - The list of users with a Panel Manager role within the ERN, with the number of panels they currently manage, is displayed
3. Click the **Assign Manager** button to assign the selected user as Panel Manager for the selected panel.
  - If a Panel Manager was previously assigned, they will be replaced by the new Panel Manager.

## EXPERT GROUPS (COORDINATOR)

The ERN Coordinator may set up Expert Groups to simplify inviting panel members and meeting participants.

- 🔗 Working on the *ERN Dashboard*, click **Expert Groups** in the *Side Menu* to open the *Expert Groups* page.
  - The details of all Expert Groups within the ERN are displayed on the *Expert Groups* page.

**Notes** An Expert Group is available only within the ERN it was created.

- The ERN coordinator may add themselves to a group.

## CREATE AN EXPERT GROUP

1. Click **Create New Expert Group** at the top of the page to open the *New Expert Group* page.
  - Type a **Group Name** and **Description** in the boxes provided.
2. A list of Available ERN Members is displayed below the group details; click **Add** to the right of the ERN Member details to add them to the group.
  - Use the **Thematic area filter** or type part of the member's name or hospital in the **Search by Name or Hospital** box to refine the list.
3. In the list of Group Members, click **Remove** to the right of the ERN Member details to remove them from the group.
4. Click the **Save** button to save the Expert Group.
  - A confirmation that the group has been added will be displayed.

## EDIT AN EXPERT GROUP

1. Click **Edit** to the right of the Group Details to open the *Edit Expert Group* page.
  - o Update the **Group Name** and **Description** as required.
2. In the list of Group Members, click **Remove** to the right of the ERN Member details to remove them from the group.
3. In the list of Available ERN Members, click **Add** to the right of the ERN Member details to add them to the group.
  - o Use the **Thematic area filter** or type part of the member's name or hospital in the **Search by Name or Hospital** box to refine the list.
4. Click the **Save** button to save the changes to Expert Group.
  - o A confirmation that group has been updated will be displayed.

## DELETE AN EXPERT GROUP

1. Click **Edit** to the right of the Group Details to open the *Edit Expert Group* page.
2. Click **Delete** at the bottom of the page to remove the Expert Group from the ERN.
  - o Click **Yes** to confirm the action.
  - o A confirmation that group has been deleted will be displayed.

## ERN MEETINGS (COORDINATOR)

The ERN Coordinator can schedule a regular meeting for the Health Professionals in the ERN. The meeting can be divided into timeslots to allow for the discussion of multiple panels or patients.

- 🔗 Working on the *ERN Dashboard*, click **ERN Meetings** in the *Side Menu* to open the *ERN Meetings* page.
  - o The details of all ERN panel meetings are displayed on the *ERN Meetings* page.

## SET UP A NEW ERN MEETING SCHEDULE

1. Click the **Create ERN meeting** button at the top of the page.
2. Enter all of the meeting details.
3. Complete the **Scheduling** requirements.
  - o The **Frequency** and **Occurs on** options will differ depending on the Repeating unit.
4. Click **Save** to add the ERN meeting.

**Note** Once saved, the ERN meeting time slots are available to be selected by a Panel Lead when scheduling meetings. See the [Manage Panel Meetings](#) section below for details.

## EDIT AN EXISTING ERN MEETING SCHEDULE

1. Click a **Detail row** on the *ERN Meetings* page to open the selected meeting details page.
2. Update the meeting details as required.
3. Click **Save** to record the changes.

**Note** Panel ERN meetings using the updated ERN meeting timeslots will be converted to Individual meetings if the number of time slots or Schedule is changed.

## DELETE AN EXISTING ERN MEETING SCHEDULE

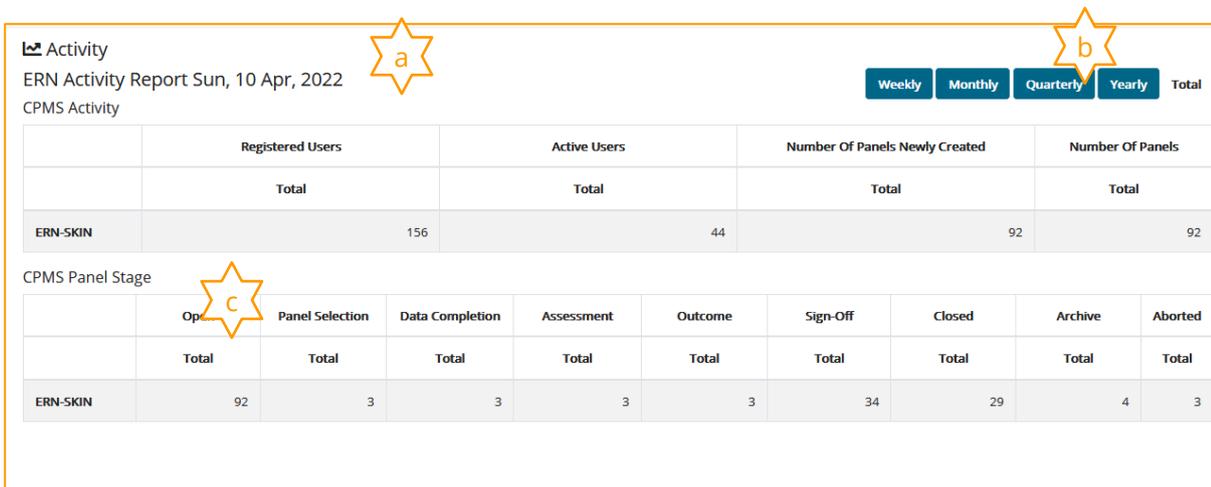
1. Click a **Detail row** on the *ERN Meetings* page to open the selected meeting details page.
2. Click **Delete ERN Meeting** to remove the ERN Meeting schedule.
  - o Confirmation of this action is required.
3. Click **OK** to complete the action and return to the *ERN Meetings* page.

**Note** Panel ERN meetings using the deleted ERN meeting timeslots will be converted to Individual meetings.

## ACTIVITY (COORDINATOR)

The *Activity* page provides a report of all CPMS and Panel activity on the ERN.

- 🔑 Working on the *ERN Dashboard*, click **Activity** in the *Side Menu* to open the *ERN Activity Report*.
  - o The date the report was generated is displayed in the page title



The screenshot shows the 'Activity' page for 'ERN Activity Report Sun, 10 Apr, 2022'. It features a summary table for CPMS Activity and a detailed table for CPMS Panel Stage. Callout 'a' points to the report date, 'b' points to the filter buttons (Weekly, Monthly, Quarterly, Yearly, Total), and 'c' points to the 'Open' column in the detailed table.

	Registered Users	Active Users	Number Of Panels Newly Created	Number Of Panels
	Total	Total	Total	Total
ERN-SKIN	156	44	92	92

	Open	Panel Selection	Data Completion	Assessment	Outcome	Sign-Off	Closed	Archive	Aborted
	Total	Total	Total	Total	Total	Total	Total	Total	Total
ERN-SKIN	92	3	3	3	3	34	29	4	3

Figure 15 - Example Activity page - Total view - see below for details

- a. The date the Activity details were last summarised is shown at the top of the page.
- b. The buttons at the top of the page can be used to display a breakdown by week, month, quarter or year.
  - o The page opens with the *Total*/summary displayed by default.

**Note** The page may need to be scrolled right/left to view all details for the Weekly, Monthly or Quarterly reports.

## PERFORMANCE (COORDINATOR)

The *Performance Indicators* page provides reports of user (Health Professional) and Panel activity on the ERN. These reports are useful when the ERN Coordinator is responding to a request for assistance when assigning a Panel Lead or when assigning a Panel Manager.

- 🔑 Working on the *ERN Dashboard*, click **Performance** in the *Side Menu* to open the *Performance Indicators* Report.
  - o The page opens with the Active Users tab displayed by default.

The **filters** and **search** at the top each tab can be used to refine the list. Click a **tab** to switch between the reports.

*Performance Indicators - Active Users* - The *Active Users* tab displays a list of Health Professionals participating in the ERN. The list can be filtered by Join date and Last Login date.

*Performance Indicators - Panels Closed* - The *Panels Closed* tab displays a list of ERN panels closed with summary details of the panel including Panel Lead and Panel Manager. The list can be filtered by date closed and by thematic area.

*Performance Indicators - Panels Created* - The *Panels Created* tab displays a list of all ERN panels, including closed, with summary details of the panel, including Panel Lead and Panel Manager. The list can be filtered by date created and thematic area.

*Performance Indicators - Thematic Area* - The *Thematic Area* tab displays a list of all ERN thematic areas with the associated Health Professionals. The list can be filtered by thematic area and ERN.

## WORKING WITH THE CENTRE PAGES

The Centre pages provide direct access to all Patients and active Panels associated with the Centre. All Centre members can view the details of all patients and panels associated with the Centre, whether or not they are a member of the ERN or panel.

🔑 Working on the *CPMS Global Dashboard*, choose a **Centre** from the *Side Menu* to open the *Centre Dashboard* for the selected Centre.

## THE CENTRE DASHBOARD

The Centre (Healthcare Provider) *Dashboard* provides an overview of the user's activity within the user's Centre (Healthcare Provider). From the *Centre Dashboard* the user can view a summary of patient enrolment, search for individual patients and see an overview of recent activity within the Centre.

Generally, a user (Health Professional) will be associated with only one Centre. However, if they are in more than one Centre, they can select the Centre to work with from the Centres drop-down list in the *Header Menu* or from the Centres option on the *Side Menu* of the *CPMS Global Dashboard* or *ERN Dashboard*.

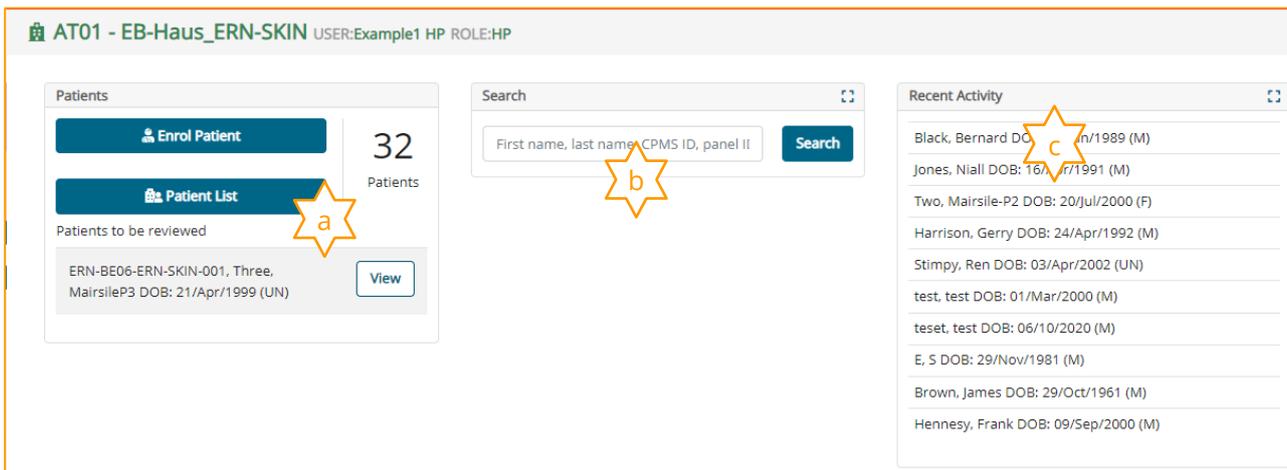


Figure 16 – The Centre (Healthcare Provider) Dashboard – see below for details

- a. The *Patients* block shows the number of patients enrolled within the Centre and provides links to enrol a new patient and view current patients in the Centre.
  - o Patients requiring review, due to transfer, will be listed in this block. Click **View** to open the patient record.
- b. The *Search* block allows the user to quickly find a particular patient, based on their first name, last name, ERN-CPMS system ID, panel ID or nickname.
  - o For example, type part of the patient's name in the box provided and click **Search** to list patients with names that match the text.
- c. The *Recent Activity* block lists the patients that have recently been enrolled or updated. Click **Patient ID** to open *Panel/s* page for the selected Patient.

Depending on the user's role in the Centre, additional blocks may be available, e.g., Panels I Managed.

## THE CENTRE SIDE MENU

While working within the *Centre Dashboard* and its associated pages, e.g., while enrolling a patient, the menu displayed on the left of the screen provides access to Centre related features.

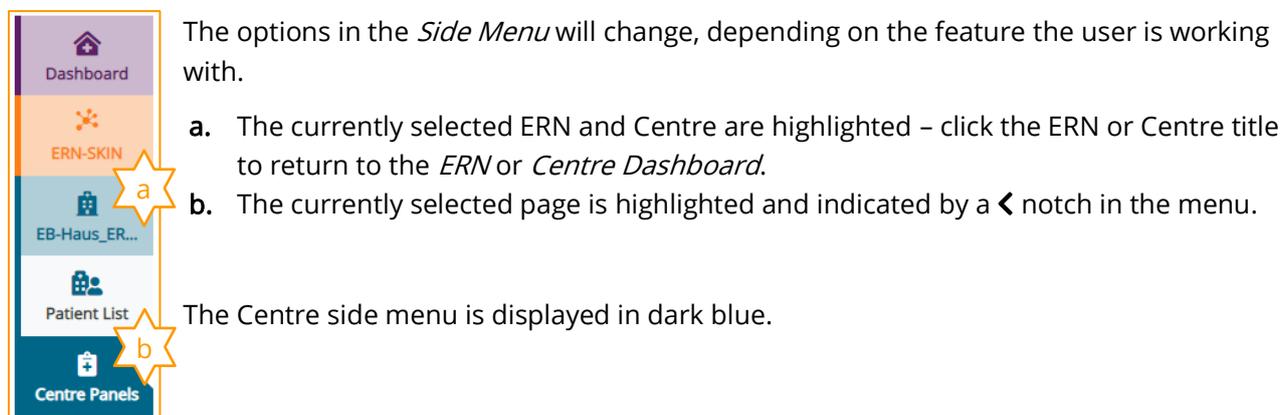


Figure 17 - The Centre Side Menu – see above for details

## ENROL A PATIENT

The first task in the virtual collaboration process is the enrolling of patients.

🔑 Working on the *Centre Dashboard*, click **Enrol Patient** in the *Patients* block to open the *Enrol Patient* page.

- A unique *Patient Id* is automatically assigned by the ERN-CPMS system.
  - The *Record Label* will be automatically generated – it is made up of the patient's name, date of birth and gender.
  - The other fields on this form are self-explanatory.
1. All **Consents** must be indicated. A date and a note may be required if consent is allowed; see the [Consent](#) section below for details.
  2. When all of the consents and the patient's details have been added, click **Enrol Patient** at the bottom of the page to save the new patient record.
    - Tick the box  and click **I Confirm** to acknowledge Data Protection responsibilities and complete the patient enrolment.
    - Click **Cancel** to return to the patient enrolment form without saving the record.

Once the patient enrolment has been completed, the *Panel Creation* page is opened allowing the user to open the first panel for the newly enrolled patient. See the [Working with a Panel](#) section below.

**Notes** All authorised users from the enrolling Centre can see all patients enrolled within the Centre regardless of enrolling user.

- No direct patient-identifying information is contained in the Panel Consultation Form – it is only visible in the enrolment form.

## CONSENT

The patient must give consent to be enrolled in the system.

The enrolling Health Professional must indicate that consent has been given using the fields on the enrolment form. Three types of consents are available:

*Consent for care:* This is the minimum required consent for enrolment and to set up a consultation panel for the patient. The **Yes** option must be selected, and the date of consent provided as the patient is enrolled in the ERN-CPMS system.

*Consent for ERN databases/Registries:* This consent is optional and is used to authorise Panel Leads to make the pseudonymised clinical data available in low accessibility databases after panels have been closed and an outcome has been signed off.

*Consent contact for research:* This consent is optional; it indicates that patients are interested in being contacted for specific research projects outside of ERN-CPMS.

Consent forms are available in the local language for all member states taking part in the ERN project.

- ▶ Click **Download Model Consent Forms** to download example PDF forms or Consent reference guides. Confirmation may be required depending on the browser settings.

## PATIENT LIST

The Centre *Patients* page provides a report of all patients enrolled in a Centre. See the [ERN-CPMS Page Structure](#) section above for further details.

- 👉 Click **Enrol Patient** to enrol a patient.  
See the [Enrol a Patient](#) section above for further details.
- 👉 Click a **Detail Row** to open the *Panels Page* for the selected Patient.  
See the [Working with the Patient Record](#) section below for further details.

## CENTRE PANELS

The Centre *Panels* page provides a report of all panels for a Centre. See the [ERN-CPMS Page Structure](#) section above for further details.

- 👉 Click a **Detail Row** to open the selected Panel.  
See the [Working with a Panel](#) section below for further details.

## WORKING WITH THE PATIENT RECORD

Once a patient has been enrolled, the patient record is associated with the enrolling Centre.

The patient record provides access to the patient details (consent and patient-identifying data), panels, attached documents and transfer requests.

- 🔗 Working on the *Centre Dashboard*, click **Patient List** in the *Side Menu* or in the *Patients* block to open the list of patients enrolled in the Centre.
  - ▶ Click a **Patient Row** to open the *Panels* page for the selected patient.

### THE PATIENT RECORD SIDE MENU



While working with a Patient Record, the menu displayed on the left of the screen provides access to Patient specific tasks.

- a. Use the ↶ return arrow above the menu to return to the original page
- b. The currently selected ERN and Centre are highlighted – click the ERN or Centre title to return to the *ERN* or *Centre Dashboard*.
- c. The currently selected page is highlighted and indicated by a ◀ notch in the menu..

The Centre side menu is displayed in green.

Figure 18 - The Patient Side Menu

## PATIENT DETAILS

The *Patient Details* page allows the user to update the patient's details, e.g., to correct a spelling error or change the consent settings.

### UPDATING PATIENT DETAILS

The Patient details can be edited from within the *Patient* pages at any time.

1. Working on the Patient's record, click **Patient Details** in the *Side Menu* to open the *Patient Details* form for the selected patient.
2. Make the changes necessary and click **Save Patient** to record the changes.
  - Click **OK** to complete the action.

**Note** If a patient's consent for care is revoked, all open panels must be cancelled. A warning message will be displayed on the patient's page to remind users to cancel any on-going or future consultation requests for that patient.

## WIPE PATIENT DATA

When the consent for care is revoked the patient record should be removed from the system.

1. Working on the Patient's record, click **Patient Details** in the *Side Menu* to open the *Patient Details* form for the selected patient.
  - o The *Wipe Patient's Data* section is at the bottom of the form.
2. Click **Wipe this Patient's data** to start wiping the record.
  - o Click **Cancel** to return to the *Patient Details* form without wiping the record.
3. Tick the box  and confirm that the patient will be notified that the record has been removed from ERN-CPMS.
4. Choose an option (**Yes** or **No**) to indicate if the patient requested the data to be removed.
  - o If Yes, the **Date of Request** must be recorded.
  - o If No, the **Reason for Deletion** must be recorded.
5. Click **Wipe Data** to remove all of the patient's data from the ERN-CPMS system.
  - o Click **OK** to complete the action.

**Note** This action removes all patient data from the ERN-CPMS system and cannot be reversed. If you intend to work with this patient again, you will have to re-enter the data.

## RE-CONSENT

Patient consent for participation in the ERN-CPMS system must be confirmed after a transfer has been accepted.

Patients requiring review of consent will be displayed in the Patients block on the *Centre Dashboard*.

A warning will be displayed at the top of all patient pages until the patient consent is reviewed.

Working on the *Centre Dashboard*, click the **View** button beside the patient details to open the *Panels* page for the selected patient.

2. Click the **Update Patient Consent** button to open the *Update Consent* page.
  - o Update the patient consent details as required.
  - o Click **Cancel** to return to the *Patient Details* form without updating the record.
3. Tick the box  to confirm the data has been reviewed and updated consent has been given.
4. Click the **Update consent** button to save the updated consent,
  - o Click **OK** to complete the action and return to the original page.

**Note** Patient data should be removed from the ERN-CPMS system if the patient's consent is more than 15 years old. See the [Wipe Patient Data](#) section above for details.

## PATIENT PANELS

The patient's *Panels* page is the first page displayed when a patient is selected; it contains details of all panels for the selected patient. See the [ERN-CPMS Page Structure](#) section above for further details.

 Working on the Patient's *Panel Page*, click a **Detail Row** to open the selected Panel. See the [Working with a Panel](#) section below for further details.

## COPY PANEL

In certain cases, the information recorded on an existing panel will be relevant for a new panel. To avoid the need to re-enter the data, an existing panel can be copied.

1. Working on the Patient's *Panel Page*, click the  menu link to the right of the panel detail and select **Copy** from the menu.
2. Select the sections to be copied to the new panel and click **Copy Panel** to save the new panel.
  - o Click **OK** to complete the action and open the copied panel.

**Notes** The new panel will be created with the same nickname as the original and should be edited immediately to avoid confusion with the original panel.

- The new panel will be created without a panel lead assigned; the current user is assigned as the panel lead when the Consultation form is edited for the first time.

## ABORT PANEL

In certain cases, a panel becomes unnecessary after it has been opened; such panels can be aborted to ensure no further information is gathered.

1. Working on the Patient's *Panel Page*, click the  menu link to the right of the panel detail and select **Abort** from the menu.
2. Type a reason for aborting the panel in the box provided and click **Abort this Panel** to abort the panel.
3. Click **OK** to confirm the action and return to the Patient's *Panel Page*.

**Notes** All patient panels must be aborted when a patient withdraws consent from participation in the ERN.

- Aborted Panels are available for reference on the patient's record.

## PATIENT DOCUMENTS

Patient report documents and images may be attached to a patient's record. Once attached they can be viewed using the built-in attachment viewer.

**Notes** Documents attached to a patient record are not available to the patient panels and are not visible to users outside of the enrolling Centre. For this reason, documents associated with a patient panel should be attached through the panel, rather than the patient record– see the [Panel Attachments](#) section below.

- Medical Documents (DICOM) can be attached to the Consultation Form – see the [Consultation Form Attachments](#) section below.

 Working on the Patient's record, click **Patient Documents** in the *Side Menu* to open the *Patient Documents* page.

- o A list of all documents attached to the patient record, including those uploaded within a panel will be displayed.

See the [Attachments](#) section below for details of working with patient documents.

## TRANSFER A PATIENT RECORD

This feature is primarily used to allow users with temporary access to the ERN-CPMS system, e.g., a Guest User (Health Professional) in a Guest Virtual Centre, to transfer patient records to the ERN coordinator as their access to CPMS expires.

**Note** Patient records must be assigned to an ERN coordinator so that the data ownership is maintained within the ERN. If a patient record has not been transferred and the enrolling guest clinician is de-activated within the ERN-CPMS system, the patient remains in Guest Virtual Centre, and is not accessible within the ERN.

ERN Coordinators are nominated and managed by DG SANTE. One user within the ERN is assigned as Transfer Coordinator to deal with transfer requests. The ERN Coordinator is usually assigned as the Transfer Coordinator, but occasionally different person may be assigned – see the [Roles and Rights](#) appendix below for details.

- The transferred patient record is fully available to the recipient Centre but no longer available to the transferring Centre.
- Transferring of a patient record is permanent.
- Transferred patient data is removed from the *Dashboard* and patient list in the originating Centre and is included on the *Dashboard* of the recipient Centre.

**Notes** If the Transfer Request is declined, the patient record is automatically removed from the ERN-CPMS system when all active panels have been closed.

- If the ERN transfer Coordinator is in the same Centre as the user, there is no need to transfer the patient; a message is displayed on the patient's *Transfer Request* page.

 Working on the Patient's record, click **Transfer Request** in the *Side Menu* to open the *Record Transfer Request* page.

- If a request has already been requested, details of the existing transfer will be displayed.

## STARTING A PATIENT TRANSFER

1. Use the **drop-down** list to select the receiving Centre for the patient record.
  - Other Centres within the ERN are listed, with the name of the Coordinator shown.
2. Type a **message** to the receiving Coordinator in the box provided.
3. Click the **Request Transfer** button to complete the transfer request.
  - Click the **Yes** button to confirm that the Patient has consented to the transfer of their identifying data.
  - Click the **OK** button to close the transfer request.

**Notes** There may be a delay in implementing a Transfer; the patient will remain at the originating centre until the Transfer is completed.

- There is no option to update or cancel the Transfer Request. If a patient is transferred in error the transfer should be accepted, and the patient should then be transferred back to the originating centre.
- The **Download Model Request form** button provides access to Model patient transfer request forms in a selection of EU languages. These forms can be used as part of an off-line transfer request.

## VIEWING A PATIENT TRANSFER

After submitting the Patient transfer request, the current status of the submitted Request is displayed on the patient's *Transfer Request* page. There is no option to update or cancel the Transfer Request after it has been submitted.

If the patient transfer has been rejected, the status will be displayed as Rejected if there are open panels for the transferred patient.

## ACCEPTING/REJECTING A PATIENT TRANSFER (COORDINATOR)

The ERN Coordinator will be notified by email and the patient transfer request will be indicated on the Coordinator *ERN Dashboard*.

1. Working on the *ERN Dashboard*, click a **detail row** in the Record Transfer Requests block to open the *Confirm Transfer Request* pop-up.
  - o The transfer request details are displayed
2. Click the **Accept** button to accept the transfer and move the patient to the receiving centre.
  - o The patient consent must be reviewed and updated at the receiving centre. See the [Re-Consent](#) section above for details.

OR

2. Click the **Reject** button to refuse the transfer.
3. Click **OK** to confirm the action and return to the *ERN Dashboard*.

**Notes** If the transfer has been accepted, the patient record and associated panels and data are immediately transferred to the receiving centre. The patient will be highlighted for review on the *Centre Dashboard* at the receiving centre.

- If the patient transfer is rejected, the patient record and associated panels and data will be deleted. If there are any open panels for the patient, the patient record will remain at the originating centre until all panels have been closed or aborted.

## WORKING WITH A PANEL

The first panel associated with a patient is opened as the patient is enrolled. Additional panels can be opened by Health Professionals working within the enrolling Centre.

The Panel workflow is fluid. Once the *Consultation Form* has been saved for the first time, members can be invited to join, documents can be attached, and meetings can be scheduled by the Panel Lead as the contributions are recorded and the outcome is drafted.

Tabs are used to switch between the *Consultation Form* and other panel areas.

**Note** The information displayed and the actions available will differ depending on the user's role. For example, only the Panel Lead may sign off the Outcome. See the [Roles and Rights](#) appendix for more details.

## CREATE A NEW PANEL

The *Panel Creation* page will be automatically opened when a new Patient enrolment is completed. Additional panels can be created for the patient as needed.

The *Consultation Request* section of the *Consultation Form* must be completed and saved before other panel tasks can be carried out.

 Working on the Patient's record, click **Panels** in the *Side Menu* to open the *Panels* page for the selected patient.

1. Click **Create a New Panel** to open the *Panel Creation* page.
  - o Items indicated in red with an asterisk (\*) must be completed.
  - o Fields may be enabled depending on information recorded in other sections/fields.
  - o The nickname is used in all panel lists and *ERN dashboard* blocks; it should not contain any patient-identifying data.
  - o A panel can be flagged to indicate that Urgency is required for the case. Panels flagged as Urgent are displayed in the Urgent Panels block on the *ERN Dashboard*.
  - o The user (Health Professional) that opens the panel is automatically assigned as Panel Lead; an alternative can be set using the drop-down list. See the [Re-assign Panel Lead \(Panel Lead / Panel Manager / Coordinator\)](#) section below for details of changing the Panel Lead after the panel has been saved.
  - o A Panel Manager from the enrolling Centre may be assigned to assist the Panel Lead.
  - o The selection list for the Secondary thematic areas will open when the Primary thematic area has been selected.
2. **Tick/Untick** a box in the section selector panel on the left of the Consultation Form to add/remove the section from the form.
  - o Confirmation is required when removing a section with data recorded.
3. Several sections of the consultation form provide the facility to attach documents. An **Attach File / Image** button will be displayed on these sections.
  - o See the [Attachments](#) section below for details of working with panel documents.
4. Click **Cancel Panel Creation** at the top right of the *Panel Banner* to exit without saving the panel.
  - o Click **Cancel Panel** to confirm the action and return to the patient's *Panels* page.
5. Click **Save** to save the details and open the new panel.
  - o The panel state is set to Panel in Progress after the *Consultation Form* has been saved for the first time.

See the [ERN-CPMS Consultation Form](#) section above for additional details of working with the form.

See the [Data Entry](#) section above for details of the different field types.

**Notes** The *Consultation Form* must be saved and closed to enable the tabs for the panel attachments, members, meetings, and contributions & outcome.

- The Panel clinical data can be viewed and edited by any user within the enrolling centre.
- If a Panel Manager from outside the enrolling centre is required, they must be assigned by the ERN Coordinator. See the [Panel Management \(Coordinator\)](#) section above.
- A Panel Manager outside of enrolling centre can be assigned when working in ERN after panel has been saved.

## OPEN AN EXISTING PANEL

Panels can be opened from the following pages:

 Working on the ERN, Centre or Patient pages, click **Panels** in the *Side Menu* to open the appropriate *Panels* page.

- ▶ Click a **Panel Detail** row to open the selected panel.

 Working on the *ERN Dashboard*, click a **Panel Detail** in a block to open the selected panel.

**Note** Active Panels can be viewed and edited by the Panel Lead, Panel Manager and users within the enrolling centre.

## THE PANEL BANNER

The banner at the top of the Panel Page displays details of the panel status, requesting centre and membership, the ERN and thematic area are also shown.

Notifications, e.g., for outstanding meeting invitations and requests for additional information are shown below the panel details, and action buttons may be displayed depending on the status of the Panel.

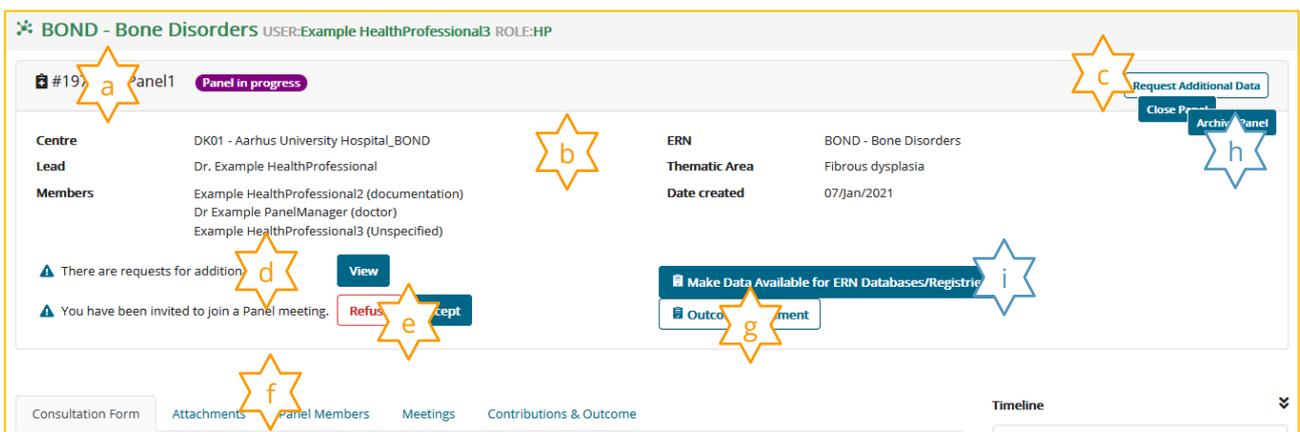


Figure 19 - Example - ERN CPMS Panel Banner

- The panel ID, name and status are shown at the top of the page.
  - A red  warning triangle will be displayed beside the Panel ID if the panel is flagged Urgent.
- The requesting Centre, Panel Lead and Panel Members (with their professional roles) are shown to the left and the ERN, thematic area and panel creation (open) date are shown to the right at the top of the banner.
- The **Request Additional Information** button can be used to send a request for information to other Panel Members. See the [Additional Data Requests](#) section below for details.
  - This option is not available after the Outcome has been signed off.

- d. Panel notifications and reminders are displayed.
  - o Click the action button beside the notice to clear it.
- e. The **Accept/Refuse Invitation** button can be used to accept or refuse Meeting invitations from the Panel Banner.
  - o The invitation notification will be cleared when the invitation has been accepted or refused.
- f. Once the *Consultation Form* has been saved and closed for the first time, the additional panel function tabs are enabled. Click a **Tab** to move between panel functions.
- g. The **Outcome Document** download button will be displayed after the outcome has been signed off.
  - o Confirmation of this action may be required depending on browser settings.

### *Panel Lead / Panel Manager View*

Additional buttons are available to the Panel Lead or Panel Manager after the outcome has been Signed off and the meeting has been Closed.

- h. When the Outcome has been signed off, a Close or Archive button will be displayed at the top right of the page depending on the status.
  - o See the [Closing a Panel](#) and [Archiving a Panel](#) sections below for details.
- i. Depending on the patient's Consent, a button will be available to Panel Lead to make the panel information available to research databases and registries, after the Panel has been Closed.
  - o See the [Make Data Available for 3rd Party Research](#) section below for details.

## ACCEPT OR REFUSE A PANEL INVITATION

All ERN Members invited to participate in a panel will receive an email notification of the invitation.

The Invitation must be Accepted in order to participate in the panel.

A notification and an Accept/Refuse Invitation button will be shown in the Notifications area of the Panel banner.



1. Working on the main *Panel* page, click a button to change the status of the invitation from Invited:
  - o **Refuse** – to refuse the invitation.
  - o **Accept** – to accept the invitation.

Panel invitations can also be Accepted or Refused from the *Panel Members* page. See the [Panel Members](#) section below for details.

- Notes** Before accepting or refusing the invitation, the **Request Additional Information** button can be used to request information to assist the user when making their decision.
- In the case of an accidental refusal or acceptance, the **Request Additional Information** button can be used to request a change to the chosen the Status.

## ACCEPT OR REFUSE A PANEL MEETING INVITATION

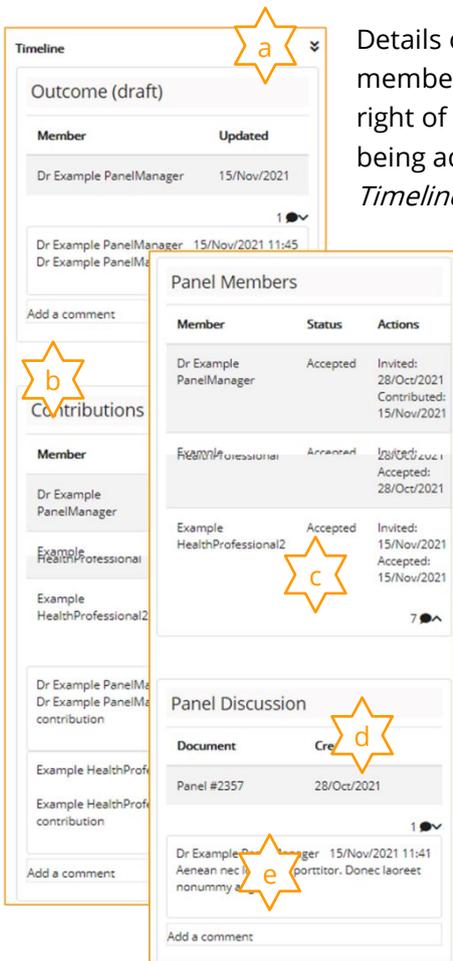
All ERN Members invited to participate in a panel meeting will receive an email notification of the invitation.

A notification and an Accept/Refuse Invitation button will be shown in the Notifications area of the Panel banner.



- Working on the main *Panel* page, click the **Accept/Refuse** button to change invitation status.
  - Refuse** – to refuse the invitation.
  - Accept** – to accept the invitation.

## THE PANEL TIMELINE



Details of the activity on the outcome and contributions, of the panel membership and panel discussions are shown in the *Timeline* block to the right of the page. The *Timeline* is maintained in real time, with entries being added as they occur. The  $\nabla \blacktriangle$  double arrows to the right of the *Timeline* title bar can be used to change the display to show the *Panel Discussion* section at the top or bottom of the block.

- The *Outcome* and *Contributions* sections are added to the *Timeline* block when the first entries are made.
  - The status of the *Outcome* is shown in the section header.
- The *Panel Members* section displays a list of Health Professionals invited to join the panel, with the status of the invitation.
  - Health Professionals that refuse the invitation are not shown in this list.
- The number of Comments within a section is shown.
  - Click the  $\bullet \nabla$  or  $\bullet \blacktriangle$  to show or hide the comments or tasks within a section.
- The Panel Discussion contains details of all data requests made during the lifecycle of the Panel.
  - The Panel ID and the date it was created are shown at the top of this section.
  - It can be used for informal chat in relation to the panel.
- Comments or tasks (actions) can be added to the *Timeline* block. See the [Timeline Comments and Tasks](#) section below for details.

Figure 20 – Example Panel Timeline- Outcome at the top

**Note** Times displayed in the Panel Timeline are shown in the time zone for the country associated with the user's profile.

## TIMELINE COMMENTS AND TASKS

Comments or tasks can be added to the *Timeline* at any time during the lifecycle of the Panel.



- The Panel Number and date Created are displayed at the top of the section.
- Additional data requests and actions requested through the *Timeline* are displayed at the top of the Panel Discussion section. See the [Additional Data Requests](#) section below for more details.
- Comments made and actions requested/completed are shown in the Comments section.
  - The number of comments is shown in the section header.
  - Click the  or  to show or hide the comments and actions.
- The name of the Panel Member who posted the Comment or Action, the status and the date it was posted are shown above each entry.
- Click the **Action** button to update the action (task). See the [Respond to an Action](#) section below for more details.
- Click in the box provided to add a comment or action (task). See the [Comments and Actions](#) section below for more details.

Figure 21 – Example - Panel Contributions Section of Timeline

## COMMENTS AND ACTIONS

The Comments and Actions feature of the panel *Timeline* provides secure messaging between Panel Members. Comments and Actions added to the *Timeline* can be seen by all Panel Members.

While the panel is In Progress members can exchange comments on images and the consultation form, contributions and the outcome document or request additional actions (tasks) or information.

**Notes** No comments or actions can be added after the Outcome document has been signed off.

- To simplify the Timeline, it is best practice to keep Comments or Actions within the Panel Discussion section.

### ADD A COMMENT OR ACTION

- Click the **Add a Comment** link to open a new Comment.
- Type the comment in the box provided.
  - Other Panel Members can be tagged to indicate their input is required; type @ to open a list of participating members and click a name to select it.
- Click the **Save As...** button and select the type to save as a comment or task.
  - Comment – saves the text entered as a Comment.
  - Task – saves the text entered as an Additional Data Request, requiring an Action.

**Note** Tasks (Actions) are added to the list of Additional Data Request in the Panel Discussion section of the *Timeline*, as well as being recorded within the section they were added.

## RESPOND TO AN ACTION

Actions are responded to in the same way as Additional Data Requests.

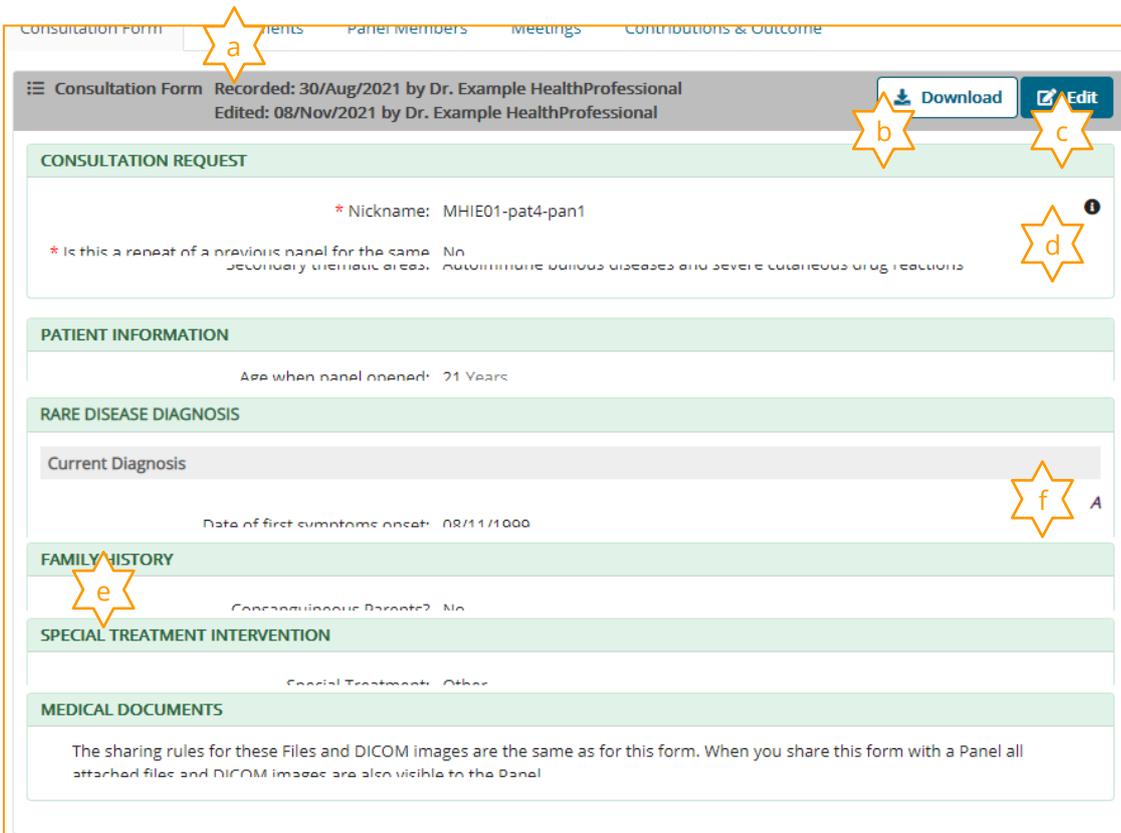
1. Click the **Action** button to open the *Additional Request* update page.
  - o See the [Respond to Data Requests](#) section below for more details.

## THE CONSULTATION FORM

### VIEW THE CONSULTATION FORM

The *Consultation Form* is the first tab displayed when a Panel is viewed.

The *Consultation Form* is made up of sections which can be added or removed as required.



The screenshot shows the 'Consultation Form' tab selected in a navigation menu. The form header includes a details bar with recording and editing dates, and buttons for 'Download' and 'Edit'. The form is divided into several sections: 'CONSULTATION REQUEST' (with a 'Nickname' field and a 'Is this a repeat...' field), 'PATIENT INFORMATION' (with 'Age when panel opened'), 'RARE DISEASE DIAGNOSIS' (with 'Current Diagnosis' and 'Date of first symptoms onset'), 'FAMILY HISTORY' (with 'Consanguineous Parents?'), 'SPECIAL TREATMENT INTERVENTION' (with 'Special Treatment: Other'), and 'MEDICAL DOCUMENTS' (with a sharing rules notice). Callout letters a-f point to the details bar, download/edit buttons, a field with an 'i' icon, the 'FAMILY HISTORY' section, and a field with an 'A' icon, respectively.

Figure 22 – Example Consultation form

- a. The details bar at the top of the *Consultation Form* shows the dates and details of the Health Professional that created and made the most recent change to the form.
- b. The download button can be used to download a PDF copy of the consultation Form.
  - o Confirmation of the action may be required depending on the browser configuration.
- c. Depending on the user's role in the panel, ERN and Centre, an Edit button will be displayed.
- d. The **i** symbol is displayed beside fields requiring complex or specific data. Click the **i** symbol to view an explanation of the data requirements.
- e. All sections that have been added to the form and the fields that have been completed are displayed in View mode.
- f. The **A** symbol beside a field indicates that the data in that section has been changed. Click the **A** symbol to view the change history for the section.

## EDIT THE CONSULTATION FORM

Once the panel is in progress, the *Consultation Form* can be updated to add or update information and to add or remove the sections on the form.

1. Click **Edit** to start editing the *Consultation Form*.
  - Items indicated in red with an asterisk (\*) must be completed.
  - The nickname is used in all panel lists and *ERN dashboard* blocks; it should not contain any patient-identifying data.
  - The Urgency of a panel can be changed as the panel progresses.
2. **Tick/Untick** a box in the section selector to add or remove the section from the form.
  - Confirmation is required when removing a section with data recorded.
  - Fields may be enabled depending on information in other sections/fields.
  - The *Consultation Request* section cannot be removed from the *Consultation Form*.
3. Several sections of the consultation form provide the facility to attach documents or images. An **Attach File / Image** button will be displayed on these sections.
  - See the [Attachments](#) section below for details of working with panel attachments.
  - Medical Documents (DICOM) may be attached to the Medical Documents section of the *Consultation Form*.
4. Click **Save** to save the details and open the new panel.
  - The panel state is set to Panel in Progress after the Consultation Form is saved for the first time.
  - Once the Consultation Form has been saved, the additional panel tasks are enabled.

See the [ERN-CPMS Consultation Form](#) section above for additional details of working with the form.

See the [Data Entry](#) section above for details of the different field types.

**Note** The other Panel tabs are disabled while the consultation page is being edited.

## FAMILY HISTORY / PEDIGREE

The pedigree tool is attached to the Family History section of the Consultation form. It can be used to track the patient's ancestry in the form of a family tree, and to show the family members who possess a relevant genetic mutation, classified either as affected or as a carrier

1. **Tick** the Family History box in the section selector to add the Family History and Pedigree sections from the form.

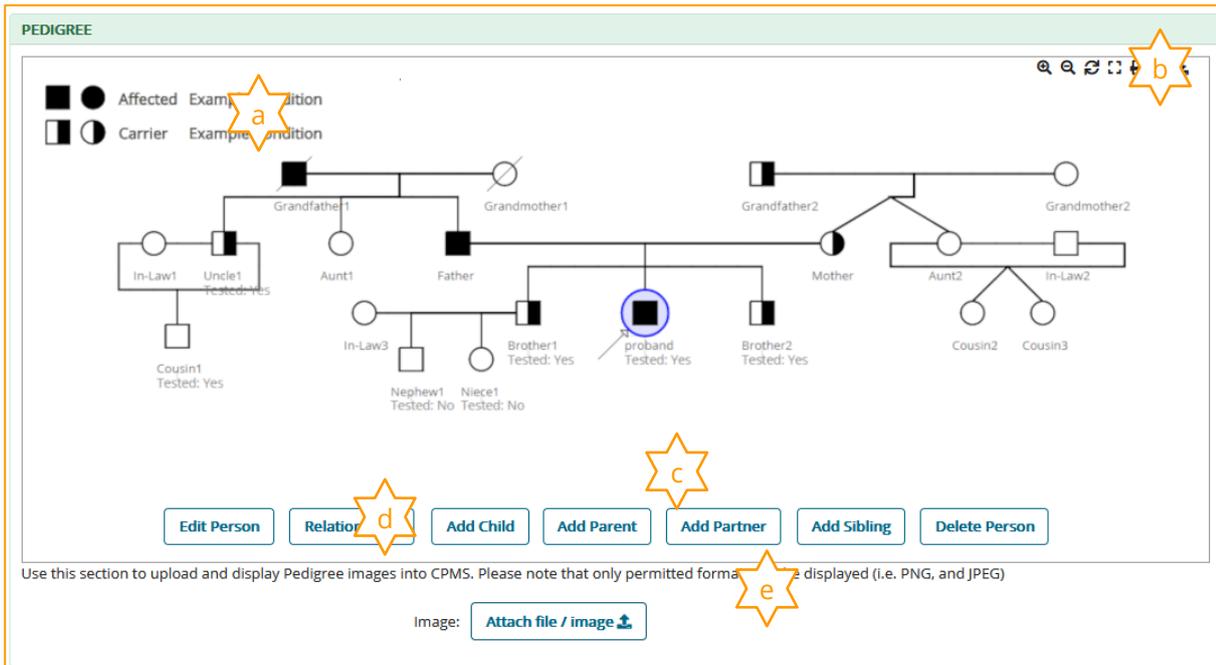


Figure 23 - Example Pedigree (Family Tree) Chart

- a. The text boxes in the top left corner next to **Affected** and **Carrier** allow the user to describe the condition in question. This helps to avoid confusion in cases where comorbidities have been declared by the patient in addition to the original condition of interest.
- b. The toolbox in the top right corner provides options to zoom (in and out), view full-screen, print and export the Pedigree chart (family tree).
  - o These options are available in View mode.
- c. Use the buttons along the bottom of the screen to add, edit or remove family members of the patient/proband.
  - o The name (mother/grandfather/child) and gender of each person added should be supplied.
  - o The other details include whether or not they are deceased, if they are a carrier, affected or neither, whether they have been tested or not, and the 'Phenotypic Abnormality' they have.
  - o The more information supplied, the more useful the chart.
- d. The **Relationships** button allows the user to set relationships between entries on the chart (family tree).
- e. An existing Pedigree chart (family tree) can be uploaded using the **Attach File / Image** button.
  - o See the [Attachments](#) section below for details.

## CONSULTATION FORM ATTACHMENTS

Documents and images can be attached while working on the *Consultation Form*. Before uploading attachments to the *Consultation Form* the user must confirm that Patient-identifying data has been removed from the document or image.

Documents attached to the *Consultation Form* are listed within the form and can be viewed and managed while working on the *Consultation Form*.

**Note** A new panel *Consultation Form* must be saved before documents can be attached.

See the [Attachments](#) section below for further information.

## PANEL ATTACHMENTS

Patient documents, images or Medical Documents (DICOM) may be attached to several sections of the *Consultation Form*. Once attached they can be viewed using the built-in attachment viewer.

 Working on a *Panel* page, click the **Attachments** tab to open the *Panel Attachments* page.

See the [Attachments](#) section below for details of working with panel attachments.

## PANEL MEMBERS

After saving the Consultation Form for the first time, the Panel Lead, Panel Manager, ERN Coordinator or members of the enrolling centre can invite ERN members to join the panel and contribute to the patient diagnoses and treatment, at any time while the panel is In Progress.

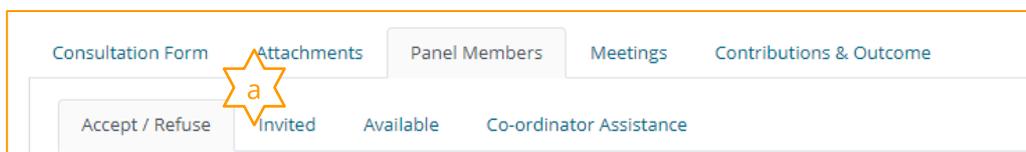


Figure 24 - Example Panel Members

**a.** The *Panel Members* page is organised into tabs; see below for a description of each one.

 Working on a *Panel* page, click the **Panel Members** tab to open the *Panel Members* page.

- Depending on the user's role within the ERN-CPMS system the tabs available on the *Panel Members* will differ.

**Notes** Before accepting or refusing the invitation, the **Request Additional Information** button can be used to request information to assist the user when making their decision.

- In the case of an accidental refusal or acceptance, the **Request Additional Information** button can be used to request a change to the chosen Status.

### ACCEPT / REFUSE (PANEL MEMBER)

The *Accept / Refuse* tab is only available to users that have an active invitation to participate in the panel.

1. Click the **Accept** button to accept the invitation and start participating in the panel.

**OR**

1. Click the **Refuse** button to refuse the invitation.

### INVITED (PANEL MEMBER)

The *Invited* tab lists the Health Professionals that have been invited to participate the panel, their area of specialisation and the status of the invitation.

1. Use the drop-down options to change the status of the invitation.
  - o Accept – marks the invited member as having accepted the invitation.
  - o Refuse – marks the invited member as having refused the invitation.

After an invitation has been Accepted or Refused, the button is removed, and users status is displayed.

### INVITED (PANEL LEAD/COORDINATOR)

The *Invited* tab lists Health Professionals that have been invited to participate the panel, their area of specialisation and the status of the invitation. After an invitation has been Accepted or Refused, the Panel Lead, Panel Manager, ERN Coordinator or members of the enrolling Centre, can change the status of the Panel Member.

1. Use the drop-down options on the button in the Status column to change the status of the invitation.
  - o Accept – marks the invited member as having accepted the invitation.
  - o Refuse – marks the invited member as having refused the invitation.
  - o Set as Lead – see the [Re-assign Panel Lead \(Panel Lead / Panel Manager / Coordinator\)](#) section below for details. (*Panel Lead / Coordinator only*)

### OR

1. The Panel Lead can use the **Accept All** button below the list to the status of all Invited members to Accepted.

### AVAILABLE (PANEL LEAD / COORDINATOR)

The *Available* tab lists the available Health Professionals and their roles within the selected thematic area.

1. Use the **Thematic Area** drop-down list to change the thematic area.
  - o The list of Health Professionals available for invitation will change.
2. Type part of the member's name or hospital in the **Search by Name or Hospital** box to refine the list.
3. Click the **Invite** button to the right of the selected Health Professional to send an invitation.
  - o Click **Invite All** at the top of the list to invite all of the Health Professionals shown.
  - o The invited participants will receive an email notification of the panel invitation.

**Note** Only the ERN Coordinator, Panel Lead, Panel Manager and members of the enrolling centre have access to the *Available* tab to invite members to participate in the panel.

### INVITE EXPERT GROUP (PANEL LEAD / COORDINATOR)

If the ERN Coordinator has set up Expert Groups, the option to invite Groups will be displayed at the top of the Available tab.

1. Use the **Choose an Expert Group** drop-down to select an Expert Group.
  - o The list of Health Professionals in the group will be displayed.
2. Click the **Invite Expert Group** button at the top of the list of Health Professional to send an invitation to all members of the Group.
  - o The invited participants will receive an email notification of the panel invitation.

## COORDINATOR ASSISTANCE (PANEL LEAD)

If the Panel Lead is unsure of who to invite to the panel, or requires input from a Health Professional from a different ERN, they can request the assistance of the Coordinator of their ERN using the **Coordinator Assistance** tab.

1. Type your assistance request the box provided.
2. Click the **I would like assistance** button to send a message to the ERN Coordinator.
  - o Click the OK button to close the confirmation message.

## RE-ASSIGN PANEL LEAD (PANEL LEAD / PANEL MANAGER / COORDINATOR)

The user that opens a Panel is automatically assigned as the Panel Lead.

The *Invited* tab can be used to assign one of the invited Health Professionals as the Panel Lead while the panel is In Progress.

1. Use the **Invited** drop-down options to change the status of the invitation.
  - o Choose **Set as Lead** to set the selected Panel Member as the Panel Lead. If the Health Professional has not yet accepted the Panel Invitation, the Panel Invitation will automatically be accepted for as they set as the Panel Lead.
  - o This option is only available to the Panel Lead, Panel Manager or Coordinator.
  - o The original Panel Lead remains as a participating member of the panel.

Alternatively, the Panel Lead can be changed while editing the Consultation Form. See the [Edit the Consultation Form](#) section above for details.

## FORWARD PANEL (COORDINATOR)

The *Forward Panel* tab allows the ERN Coordinator to move the panel to a different ERN.

For example, when a diagnosis is updated, the ERN may be change; a panel for paediatric patient with a skin complaint was originally added to ERN-SKIN - Skin Disorders, as the diagnosis is refined it is determined that it should be in PaedCAN - Paediatric Cancer.

1. Use the **drop-down** to select an alternative ERN to handle the panel.
2. Type a **Message** in the box provided.
3. Click the **Forward Panel** button to the right of the selected Health Professional to send an invitation.
  - o Click **OK** to complete the action and return to the panel.

**Notes** Once the panel has been forwarded, it will be removed from the list of panels in the forwarding ERN and added to the list of panels at the receiving ERN.

## INVITE GUEST MEMBERS (COORDINATOR)

If the Panel Lead requests assistance when forming a panel, the ERN Coordinator will be notified by email and the request will be indicated on the Coordinator's *ERN Dashboard*.

The ERN Coordinator or dispatcher may invite members to the panel or may contact the user for more information.

The *Invite Guest Members* tab can be used to select Health Professionals from another ERN to participate in the Panel.

1. Use **ERN from which to select member** drop down to select an ERN from which to select a guest panel member or participant.
2. Use the **Thematic Area** drop-down list to change the thematic area.
  - o The list of Health Professionals available for invitation will change.
3. Click the **Invite** button to the right of the selected Health Professional to send an invitation.
  - o Click **Invite All** at the top of the list to invite all Health Professionals shown.
  - o The invited participants will receive an email notification of the panel invitation.

## MANAGE PANEL MEETINGS

Meetings allow video conferencing between Panel Members.

This section of the user guide describes meeting management tasks. See the [Participating in Meetings](#) section below for details of taking part in a meeting.

- 🔗 Working on a *Panel* page, click the **Meetings** tab to open the *Meetings* page.
  - o The details of all panel meetings are displayed on the *Meetings* page.
- ▶ Click a **Meeting Title** to open the *Meeting* details for the selected meeting.

**Note** All Panel Members can view the details all meetings on the *Meetings* page; only members invited to the meeting will have the option to Join the meeting or add comments.

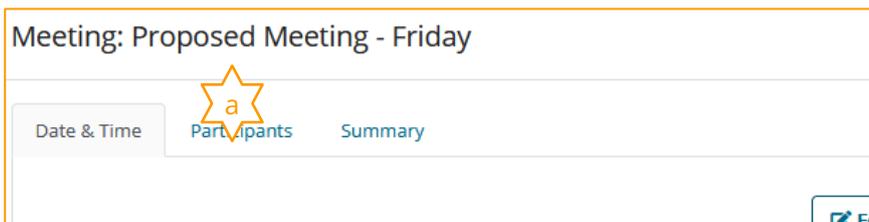


Figure 25 - Example Meetings Details page – see below for details.

- a. The *Meetings Details* page is organised into tabs; see below for a description of each one.
  - o Additional tabs will be given if the meeting is a ERN Recurring Meeting or if a recording was made of the meeting.

The tabs on the *Meetings Details* page show:

<b>Date &amp; Time</b>	The meeting title and description, the status, date, time and duration of the meeting, the name of the panel for which the meeting was held. The meeting Host and Moderator can <b>Edit</b> the details a meeting.
<b>ERN recurring meeting</b>	Details of the other meeting slots in the ERN Recurring Meeting.

<b>Participants</b>	<p>A list of current participants showing the participant's name, invitation date and status.</p> <p>The meeting Host and Moderator can <b>Invite</b> the participants to join meeting.</p>
<b>Summary</b>	<p>The summary of the meeting discussion and actions.</p> <p>The meeting Host and Moderator can <b>Edit</b> the Summary of a meeting.</p>
<b>Recordings</b>	<p>This tab will not be shown if no recordings were made.</p> <p>All meeting participants can view meeting recordings</p> <p>See the <a href="#">Participating in Meetings</a> section below for details</p>

## SCHEDULE A MEETING

Meetings can be scheduled by the Panel Lead or any member of the panel at any time until the Panel has been Closed. Health Professionals from the enrolling Centre can also schedule meetings.

1. Working on the panel *Meetings* page, click **Schedule Meeting** to start a new meeting.
2. Select a **type** for the meeting.
  - o After selecting the meeting type, the options for scheduling the meeting will be displayed.
3. Type a **title** for the ERN time slot or meeting in the box provided.
4. Type a brief **description** of the meeting in the box provided.

### *ERN Recurring Meeting*

5. Select the ERN meeting to join.
6. Select an available time slot.
5. Click **Schedule Slot** to save the meeting details and open the *Meeting Details* page.
  - o Only one ERN Meeting can be scheduled for each patient.

### *Individual Meeting*

5. Select the **date, time** and **duration** (length) for the meeting.
6. Click **Schedule Meeting** to save the meeting details and open the *Meeting Details* page.

### *Proposed Meeting*

5. Select the **duration** (length) for the meeting.
6. Click the **+** to add proposed time slots for the meeting.
  - o Select a **date** and **time** and click **Propose** to add to the proposed meeting schedule.
7. When all time slot suggestions have been added, click **Schedule Meeting** to save the meeting details and open the *Meeting Details* page.

Once the Meeting has been scheduled, members of the panel and other ERN members must be invited to join the meeting. See the [Manage Meeting Participants](#) section below for details.

## MEETING TIMES/TIME ZONE

All meeting times displayed are shown in the time zone for the country associated with the user's profile.

For example, a meeting scheduled for 15:00 by a host with a home country of the Netherlands, will be displayed with a time of 14:00 for a participant with a home country of Ireland; if that participant has travelled to New York, the time will remain at 14:00 (Europe/Dublin).

## MANAGE MEETING PARTICIPANTS

Once the Meeting has been scheduled, participants can be invited to join the meeting.

The Panel Member that schedules a meeting is automatically designated as the meeting host. If the Panel Member that schedules a meeting is not the Panel Lead, the Panel Lead is automatically invited and designated as a moderator.

The meeting host, moderator or Panel Lead can invite Panel Members to participate in the meeting. Health Professionals from the ERN network and enrolling Centre can also be invited to the meeting.

1. Working on the panel *Meetings* page, click a **meeting title** to open the *Meeting Details* page.
2. Open the *Participants* tab.
  - o The Panel Lead and Host (if not the same as Panel Lead) will always be shown as participants and cannot be marked as refused.
  - o Currently invited meeting Participants will be displayed at the top of the page.
3. After inviting participants to the meeting (see below), click **Close** to return to the main Panel page.

See the sections below for details of inviting meeting participants.

**Note** The options below will not be displayed if all members have been invited, e.g., once all Panel Members have been invited, this option will not be displayed.

### INVITE PANEL MEMBERS

Panel members who have not been invited to the meeting will be displayed below the list of Meeting participants.

4. Use the **Invite** button beside the health professional name to invite them to the meeting.
  - o The **Invite All** button can be used to invite all ERN members to the meeting.
  - o A confirmation that invited participants have been sent an email notification of the meeting invitation will be displayed.

### INVITE EXPERT GROUP

If Expert Groups have been added for the ERN, the option to invite Groups will be displayed at the top of the Available tab.

5. Select the **Expert Group** from the drop-down list.
6. Use the **Invite Expert Group** button above the list health professionals in the group invite them to the meeting.
  - o A confirmation that invited participants have been sent an email notification of the meeting invitation will be displayed.

### INVITE MEMBERS OF THE ERN

A list of members of the ERN will be displayed, with the option to invite members to the meeting will be available.

7. Use the **Invite** button beside the health professional name to invite them to the meeting.
  - o The **Invite All** button can be used to invite all ERN members to the meeting.
  - o A confirmation that invited participants have been sent an email notification of the meeting invitation will be displayed.

## EDIT MEETING DETAILS

Once the Meeting has been scheduled, the details can be edited by the meeting host or the Panel Lead.

1. Working on the panel *Meetings* page, click a **meeting title** to open the *Meeting Details* page.
2. Open the *Date & Time* tab.
3. Click the **Edit** button to start updating the meeting details.
  - o All meeting details, except the meeting type, can be changed.
  - o The date and time of finished or cancelled meetings cannot be changed.
4. Click the **Update** button to save the changes.
5. Click **Close** to return to the main Panel page.

**Note** If the meeting type has changed, the meeting should be cancelled and a new meeting added.

## STARTING AND FINISHING A MEETING

It is good practice for the host/moderator to change the status to Started before joining the meeting and to Finished when the meeting has ended.

Meetings are automatically flagged as Finished as they are moved into the Past Meetings section at the end of each day.

## CONFIRM A PROPOSED MEETING TIME

The proposed meeting time can be confirmed through the *ERN Dashboard*.

See [The My Proposed Meetings Block](#) section above for more details.

## UPDATE THE MEETING SUMMARY

Once the Meeting has been scheduled, the Summary can be edited by the meeting host, moderator or the Panel Lead. The summary is typically used to show the meeting agenda and minutes.

1. Working on the panel *Meetings* page, click a **meeting title** to open the *Meeting Details* page.
2. Open the *Summary* tab.
3. Click the **Edit** button to start updating the meeting summary.
4. Click the **Update** button to save the changes.
5. Click **Close** to return to the main Panel page.

**Note** To facilitate note taking, the meeting summary can be edited while the meeting is in progress.

## CONTRIBUTIONS AND OUTCOME

The *Contributions & Outcome* tab provides all Panel Members with the opportunity to contribute to the panel outcome.

All Panel Members can make contributions, view contributions from other Panel Members and view the outcome as it is drafted.

**Note** The outcome can be updated only by the Panel Lead and the Panel Manager.

- 🔑 Working on a *Panel* page, click the **Contributions & Outcome** tab to open the *Contributions & Outcome* page.
  - o The user's contribution is displayed and can be edited on the first tab.
  - o The contributions from other Panel Members can be viewed on the remaining tabs.
  - o The panel Outcome is displayed below the contributions.

## ADDING OR UPDATING A CONTRIBUTION

Each Panel Member may add or update their contribution at any time before the outcome is signed off.

1. Working on the panel *Contributions & Outcome* page, click in the box provided to edit the contribution text.
  - o Each time the contribution is updated, the time spent should be updated.
2. Click **Choose File** to open the file browser to search for and select the file.
  - o Tick the box provided to confirm that the uploaded file does not contain any patient-identifying data.
3. Click **Record Contribution** to save the Contribution text and file.

**Notes** Files attached to the Contribution do not get attached to the panel or patient records and cannot be viewed elsewhere.

- A note is added to the *Contributions* section of the *Timeline* block each time a contribution is updated.

## VIEW CONTRIBUTIONS FROM OTHER PANEL MEMBERS

1. Working on the panel *Contributions & Outcome* page, click the tab for another Panel Member to view their contribution.
  - o The last date and time the contribution was updated is shown below the contribution text.
2. If a file has been attached to the contribution, the file name will be displayed below the contribution text.
  - o Click the **download** link provided to download the file; confirmation may be required depending on the browser configuration.

## REQUEST CONTRIBUTIONS (PANEL LEAD)

1. Working on the panel *Contributions and Outcome* page, click the **Request Contributions** button to send a reminder to all Panel Members that contributions should be made.
  - o An email is sent to all Panel Members to remind them to create their contribution.

## ADDING OR UPDATING THE PANEL OUTCOME (PANEL LEAD AND PANEL MANAGER)

The Panel Lead will draft the outcome based on the clinical data recorded on the consultation form, meeting discussions and the contributions of all Panel Members.

1. Working on the panel *Contributions & Outcome* page, click the **Edit** button in the Outcome area to start adding or updating the Outcome.
  - o Type a draft outcome in the box provided.
2. Use the dropdown options provided to rate the **Usefulness** and **Outcome** of the panel.
3. Click the **Save** button to save the updated draft outcome.

**Notes** Once saved, the draft Outcome text is available for all Panel Members to view and comment on.

- The Panel Outcome is also displayed at the end of the *Consultation Form*.

## SIGN-OFF THE PANEL OUTCOME (PANEL LEAD)

**Note** Only the Panel Lead can Sign-off the panel Outcome.

1. Working on the panel *Contributions & Outcome* page, click the **Sign-off** button start the Outcome Sign-off.
2. Click **Sign-off Panel** to confirm the action.

Once the Outcome has been signed off:

- The *Outcome* cannot be updated.
- The *Consultation Form, Attachments, Members* and *Contributions* are set to read-only.
- Meetings can continue to be scheduled and attended.
- The **Outcome Document** button is made available in the *Panel Banner* to allow the download of the Panel Outcome document in PDF format.

**Notes** After the panel outcome has been signed off the panel should be closed. See the [Closing a Panel](#) section below for more details.

- If changes to the outcome or other panel areas are necessary after the Outcome has been signed off, the panel can be restarted using the option on the patient's Panels page. See the [Patient Panels](#) section above for more details.

## ADDITIONAL DATA REQUESTS

Additional Data Requests can be made and responded to by all Panel Members at any time while the panel is In Progress.

Additional data requests can be made using the button in the Panel banner or by adding an Action to the *Timeline* block.

- 🔔 Working on a *Panel* page, a notification will be displayed in the *Panel Banner* if there are outstanding Additional Data Requests.
  - Details of all Additional Data Requests are also displayed in the Panel *Timeline*.

## CREATE A NEW DATA REQUEST

1. Working on a *Panel* page, click the **Request Additional Data** button at the top right of the *Panel Banner* to open a new *Data Request* form.
2. Type the request in the box provided.
  - Other Panel Members can be tagged to indicate that their input is required; type @ to open a list of participating members, click a name to select it.
3. Click the **Create Request** button to save the request.
  - The details will be added to the *Panel Discussion* area of the *Timeline*.
  - A notification will be displayed in the Panel Banner.

See the [Add a Comment or Action](#) section above for details of adding Actions to the *Timeline*.

RESPOND TO DATA REQUESTS



- Working on a *Panel* page, click the **View** beside the additional data request notification to open the *Additional Request summary* page.
  - All Additional Data Requests for the Panel are listed on the *Additional Request summary* page. The name of the Panel Member who posted the Data Request or Action, the date it was posted, the status and the details will be displayed.
- Click a **detail row** to open the *Additional Request detail* page.

OR

- Working on a *Panel* page, click the **Action** button beside the entry in the *Timeline* to open the *Additional Request summary* page.

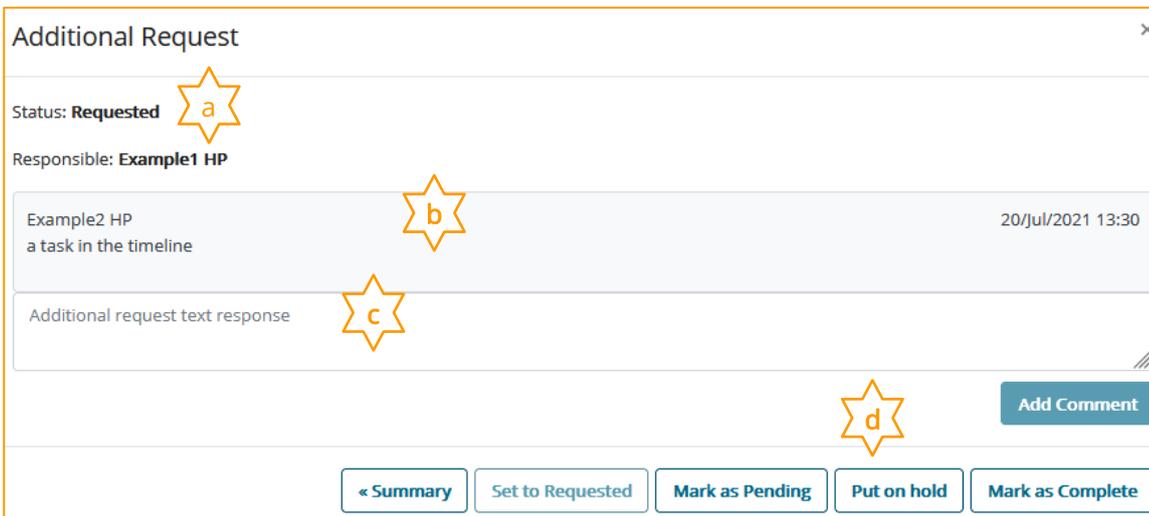


Figure 26 - Example Additional Data Request - see below for details.

- Details of the status and owner of the request are shown at the top of the page.
- The request and any comments and responses are shown below the details.
- Responses can be added using the box provided.
- The button at the bottom of the page save the response and change the status of the Request

Once the *Additional Request* detail page has opened.

- Type the **Response** in the box provided.
- Click an appropriate button to complete the response. See the table below for details.

<b>Add Comment</b>	Save the response and keep the request active.
<b>&lt;&lt; Summary</b>	Return to the <i>Additional Request summary</i> page without saving the response.
<b>Set to Requested</b>	Actions or Data Requests that are Pending, On Hold or Complete can be re-set to Requested to allow further action or response.

<b>Mark as Pending</b>	<p>Save the response and mark the request as Pending.</p> <p>For example, when the Request requires more data to be provided or an action to be taken/performed (e.g. filling a form section, upload images) before it can be completed.</p>
<b>Put on Hold</b>	<p>Save the response and mark the request as on Hold.</p> <p>For example, when there will be a delay in responding to the Request, perhaps due to difficulty contacting the appropriate expert.</p>
<b>Mark as Complete</b>	<p>The Action/Request has been addressed.</p>

## CLOSING A PANEL

The panel cannot be closed until the Panel Outcome has been signed off. Only the Panel Lead, Panel Manager or a Health Professional from the enrolling centre can close a Panel.

A *Transition to Closed* questionnaire must be completed as the panel is closed.

**Note** Closing a Panel is a permanent action – a closed panel cannot be restarted.

1. Working on the main *Panel* page, click the **Close Panel** button at the top right of the *Panel Banner* to open the *Transition to Closed* questionnaire.
2. Record the time spent on the panel and answer the questions using the options and selection boxes provided.
3. Click the **Continue to Closed** button to Close the Panel and return to the main Panel page.

**Note** If a patient transfer was requested, and rejected, a reminder will be given when closing the last panel for the patient. The patient record and all panels and data will be deleted from the ERN-CMPS system and the user returned to the *Centre Dashboard*.

Once the panel is closed:

- The Outcome document can be downloaded. The Panel clinical data and timeline remain available for review by all Panel Members and Health Professionals from the enrolling Centre.
- If the patient has consented to sharing data with ERN databases and registries, a button will be available to Panel Lead to make the panel information available to research databases and registries.

If the patient is marked Dead as the panel is closed, the patient record will be frozen so that:

- All In Progress panels will be automatically set to Aborted.
- All Closed panels will automatically Archived
- No future panel can be opened for the patient.
- The patient record will be marked as Frozen in the Study Manager.

## MAKE DATA AVAILABLE FOR 3<sup>RD</sup> PARTY RESEARCH

Once the panel has been closed, the Panel Lead, Panel Manager and Health Professional from the enrolling Centre will have the opportunity to share the panel details with authorised third parties.

1. Working on the main *Panel* page, click the **Make Data Available for ERN Databases and Registries** button in the *Panel Banner* to flag the panel as available to authorised third party researchers.
  - o Click **OK** to complete the task.

## ARCHIVING A PANEL

Only the Panel Lead, Panel Manager or a Health Professional from the enrolling centre can archive a panel.

The archived panel will be removed from the ERN but remains in the Patient's record and can be viewed by Health Professionals in the enrolling Centre.

1. Working on the main *Panel* page, click the **Archive Panel** button at the top right of the *Panel Banner* to open the *Transition to Archive* confirmation.
  - o Tick the box provided to confirm that the panel should be archived.
2. Click **Continue to Archived** to archive the panel.

**Notes** Archiving a Panel is a permanent action, it cannot be reversed; an archived panel cannot be cancelled or restarted.

- The Make Data Available for ERN Databases and Registries button is not available after archive

## PARTICIPATING IN MEETINGS

The video conferencing technology built into ERN-CPMS allows full video and audio communications as well as screen sharing and recording of the meeting.

Meetings within ERN-CPMS system use built-in video conferencing technology which requires additional resources. See the [System Requirements](#) appendix below for details of all requirements.

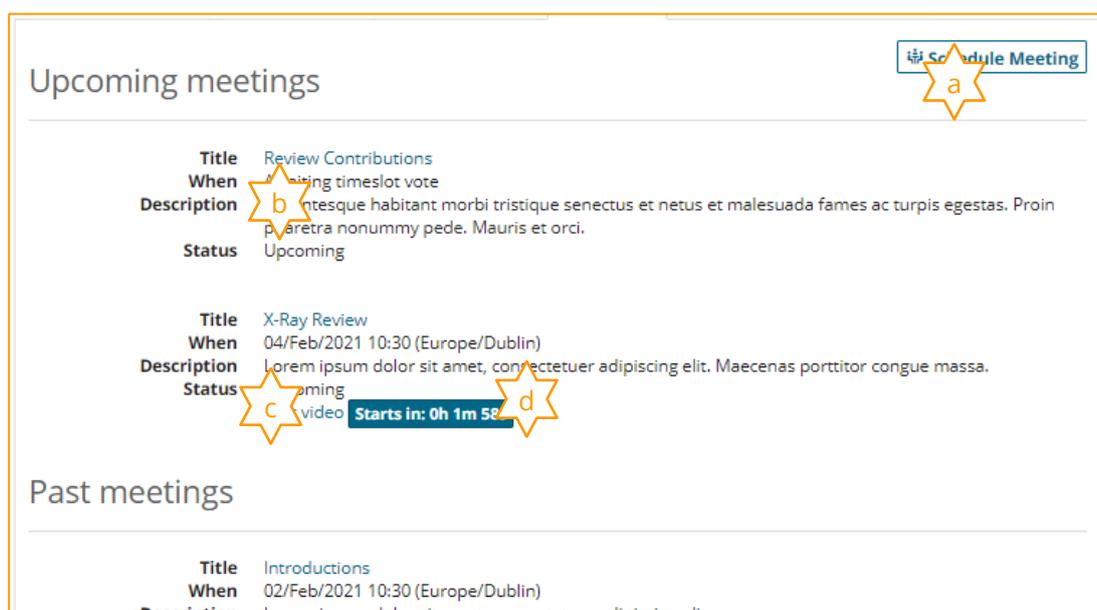
**Notes** Use of the MS Explorer or Safari browser is not recommended - users may experience problems when joining video meetings or sharing screens.

- The share the screen functionality is not supported on older versions of Microsoft Edge.
- To ensure the best performance of audio and video during meetings, other applications that use the microphone or camera such as Skype, Zoom, etc. should be closed while using the ERN-CPMS system for meetings.

- 🔗 Working on a *Panel* page, click the **Meetings** tab to open the *Meetings* page.
  - The details of all panel meetings are displayed on the *Meetings* page.

The panel *Meetings* page is divided into three sections:

- Upcoming Meetings: meetings scheduled in the future – view all details, add comments.
- Past meetings: finished meetings from earlier dates – view all details, comments and recordings.
- Cancelled meetings: cancelled meetings – view all details and comments.



The screenshot displays the 'Upcoming meetings' section. At the top right, there is a 'Schedule Meeting' button (labeled 'a'). Below this, two meeting cards are shown. The first card has a 'Title' of 'Review Contributions', a 'When' field, a 'Description' (labeled 'b'), and a 'Status' of 'Upcoming'. The second card has a 'Title' of 'X-Ray Review', a 'When' field showing '04/Feb/2021 10:30 (Europe/Dublin)', a 'Description', and a 'Status' of 'Upcoming'. Below the second card, there is a 'Test video' button (labeled 'c') and a 'Starts in: 0h 1m 58s' countdown timer (labeled 'd'). Below the 'Upcoming meetings' section, the 'Past meetings' section is partially visible, showing a meeting titled 'Introductions' on '02/Feb/2021 10:30 (Europe/Dublin)'.

Figure 27 - Panel Meetings page

- The Schedule Meetings button can be used to add a new meeting. See the [Schedule a Meeting](#) section above for details.
- A summary of the details of all panel meetings is displayed. Click a meeting **Title** to open the meeting
- The **Test video** button displayed beside the Countdown should be used to test video and sound before joining a meeting.
- The **countdown timer** will become active 5 minutes before the meeting start time and can be used to join the meeting earlier than the official start time. See the [Join a Meeting](#) section below for details.
  - The timer changes to **Join Meeting** at the allocated meeting time.

## ACCEPT OR REFUSE A MEETING INVITATION

All participants invited to a meeting will receive an email notification of the invitation. The invitation can be accepted in four ways. See the sections below.

**Note** Once the invitation has been Accepted or Refused the choice can be reversed from the *My Meetings* page for the ERN. See [The My Meetings Page](#) section above below.

## USING THE EMAIL LINK

The email notification of the meeting invitation will contain a link, allowing the user to quickly accept or refuse the invitation without the need to login to the ERN-CPMS system.

The email subject line will be *CPMS: You are Invited to a Panel Meeting* and will contain details of the panel and the meeting title and time.

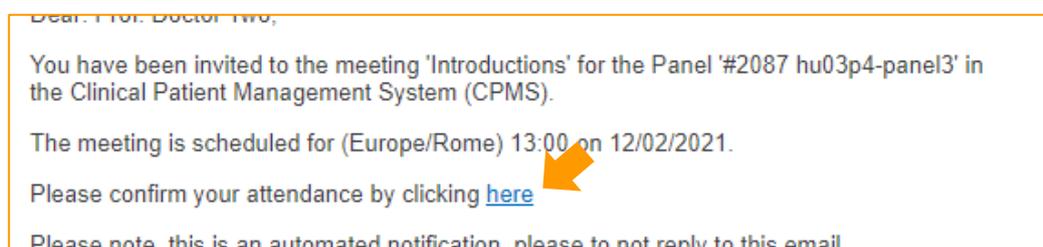


Figure 28 - Extract from *CPMS: You are Invited to a Panel Meeting* email.

1. Working on the email, click the **here** link to open the meeting invitation.
  - o A browser window will automatically open with the *Meeting Invitation* displayed.
2. Click an **option** to change the status of the invitation.
  - o **Accept** – marks the user as having accepted the invitation.
  - o **Decline** – marks the user as having declined the invitation.
3. The browser window can be closed when the confirmation has been displayed.
  - o If the user is logged in to the ERN-CPMS system, click the **ERN logo** or **CPMS** link in the *Header Menu* to return to the *CPMS Global Dashboard*.

**Note** The email link can be used more than once, to change the original choice.

## FROM THE PANEL NOTIFICATIONS AREA

A notification and an Accept/Refuse Invitation button will be shown in the Notifications area of the Panel banner.

See the [Accept or Refuse a Panel Meeting Invitation](#) section above for details.

## FROM THE ERN PAGES

The *ERN dashboard* and *My Meetings* pages also provide options for accepting or refusing Meeting Invitations.

See the [Working with the ERN Pages](#) section above.

## FROM THE MEETING DETAILS PAGE

1. Working on the panel *Meetings* page, click a **meeting title** to open the *Meeting Details* page.
2. Click the **Participants** tab to view details of all meeting participants.
3. Use the **Invited** drop-down options to change the status of the invitation.
  - o **Accept** – marks the user as having accepted the invitation.
  - o **Refuse** – marks the user as having refused the invitation.
4. Click **Close** to return to the main *Panel* page.

## VOTE FOR A PROPOSED MEETING TIME

All participants invited to a proposed meeting will receive an email notification of the meeting time proposal.

Proposed meeting times can be voted for directly from the email or from the main *Panel* page.

- Notes** By voting for proposed time slots the invitation to the meeting will be automatically accepted when the meeting host confirms a time for the meeting.
- The meeting will be displayed in the *My Meetings* block on the *ERN Dashboard* and on the *ERN My Meetings* page when the host has confirmed the time.
  - All meeting times displayed are shown in the time zone for the country associated with the user's profile.

## VOTE USING THE EMAIL LINK

The email notification of the meeting invitation will contain a link, allowing the user to quickly select timeslots when they will be available to join the meeting without the need to login to the ERN-CPMS system.

The email subject line will be *CPMS: New Meeting Time Proposal* and will contain details of the panel and the meeting title and time.

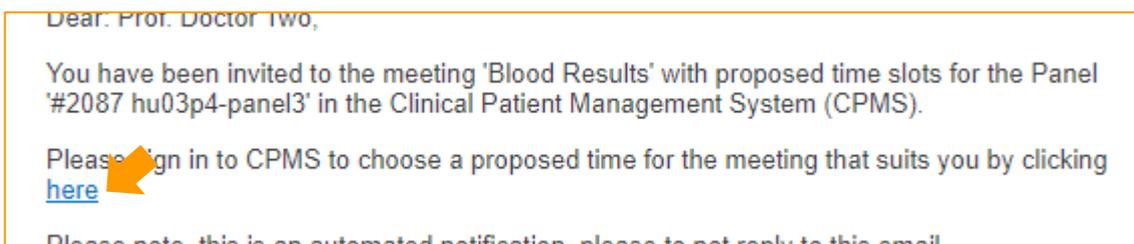


Figure 29 - Extract from CPMS: New Meeting Time Proposal email.

1. Working on the email, click the **here** link to open the *Timeslot Selection* page.
  - o A browser window will automatically open with the Meeting *Timeslot Selection* displayed.

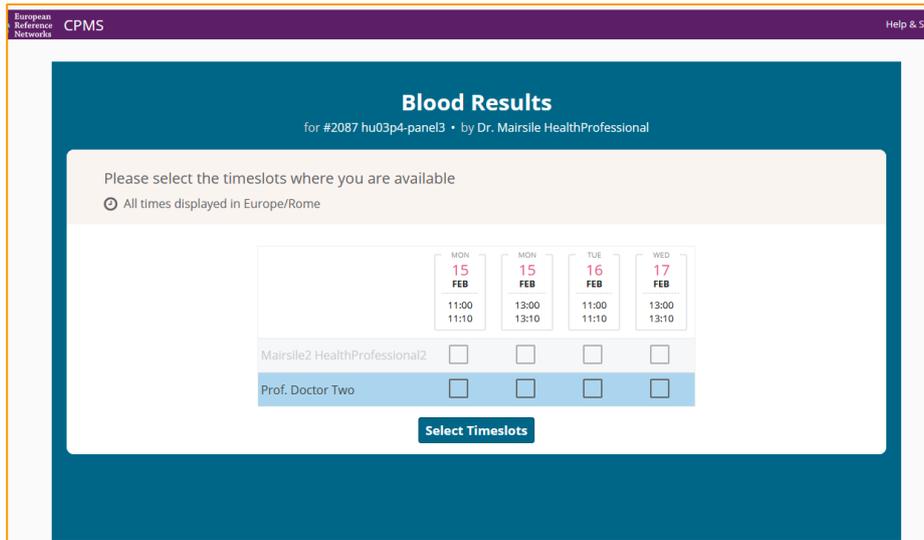
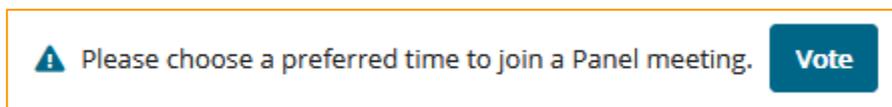


Figure 30 – The Meeting Timeslot Selection Page.

2. Working on the *Timeslot Selection* page.
  - o The time zone for the meeting will be displayed.
  - o The choices of other meeting participants will be displayed.
3. Click an **option** to select the preferred timeslot.
  - o More than one timeslot can be selected.

#### VOTE FROM THE MAIN PANEL PAGE

A notification and a Vote button will be shown in the notifications area of the Panel banner.



1. Working on the main *Panel* page, click the **Vote** button to open the *Meeting Timeslot Selection* page.
  - o The time zone for the meeting will be displayed.
  - o The selections of other invited Panel Members are shown.
2. Click an **option** to select the preferred timeslot.
  - o More than one time slot can be selected.
3. Click the **Select Timeslots** button to submit the choices.
4. On the confirmation page, click the **CPMS** logo in the *Header Menu* to return to the *CPMS Global Dashboard*.
5. Click the **Select Timeslots** button to submit the choices.
6. The browser window can be closed when the confirmation has been displayed.
  - o If the user is logged in to the ERN-CPMS system, click the **ERN logo** or **CPMS** link in the *Header Menu* to return to the *CPMS Global Dashboard*.

**Note** The email link can be used only once. A page not found error will be displayed if the user tries to use the link a second time.

## JOIN A MEETING

The **Join Meeting** button remains active until the meeting has been marked finished by the meeting host or Panel Lead (moderator).

Both the Panel Lead and the meeting Host are assigned Moderator rights when joining a meeting. The Moderator has full control over the meeting to add, mute or remove participants and can record parts of the meeting for future reference.

**Note** It is recommended that users test the video and sound before joining the meeting by using the **Test Video** link beside the *Join Meeting* button.

1. Working on the panel *Meetings* page, click the **Join Meeting** button to join the meeting.
  - o The countdown timer will become active 5 minutes before the meeting start time and can be used to join the meeting earlier than the official start time.
  - o The meeting opens in a new browser tab.
  - o Depending on the browser settings, confirmation of use of camera and microphone may be required.

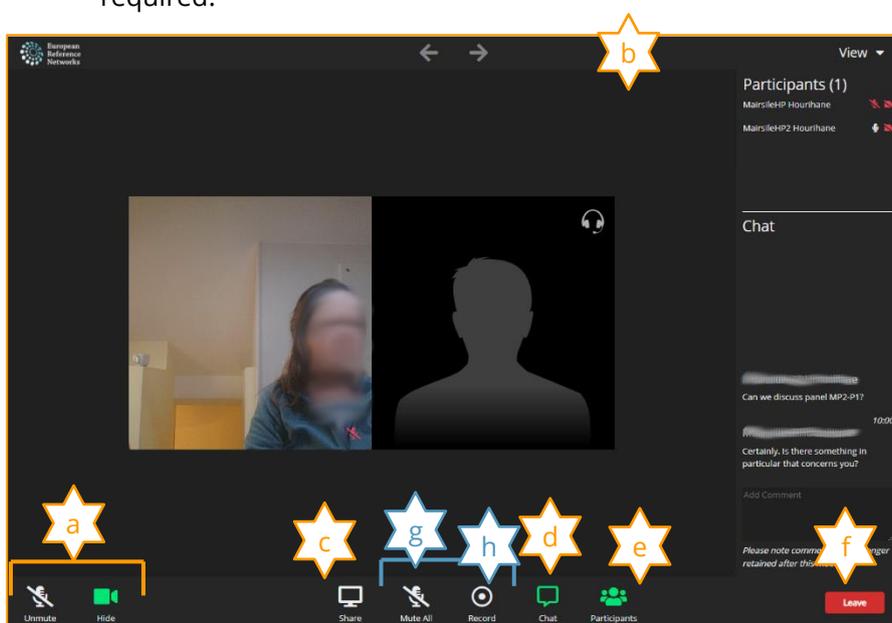


Figure 31 - Meeting in Progress - screen shared

- a. The first two icons in the toolbar can be used to turn the camera and microphone on or off.
  - o The colour of the icon and the text will change depending on the state.
- b. The toolbar at the top of the page can be used to change how the participants are displayed.
  - o Use the View menu to switch between Compact and Comfortable depending on the number of participants.
  - o Use the ← and → arrows to move between pages of participants.
- c. The  icon can be used to share the screen.
  - o See the [Sharing the Screen](#) section below for details.
- d. The  icon can be used to chat with other meeting participants.
  - o This is an in-meeting chat and is not saved with the meeting.
- e. The  icon can be used to show or hide the list of meeting participants.
- f. Click the red **Leave** button to leave the meeting.
  - o The option to download the meeting chat as a text file is given.
  - o Confirmation of the action is required.

### Host / Panel Lead (moderator) View

Additional buttons are available to the meeting Host and Moderator.

- g. The  button can be used by the Host or Moderator to mute all participants.
- h. The  icon can be used to start/stop a recording of the meeting screen.
  - o See the [Recording a Meeting](#) section below for details.

### SHARING THE SCREEN

Selected windows on the user's screen can be shared with other meeting participants. For example, a PDF window can be shared to show a document to other meeting participants.

1. Click the  **Share screen** icon to start sharing the screen.
  - o Select the screen, window or browser tab share.
  - o Click **Share/Allow** to show the window to the other meeting participants.
2. Click the  **Stop sharing** icon to finish sharing the screen.

**Notes** Depending on the browser settings, the application window selection method and start sharing tasks will differ.

- Depending on the browser settings, an information panel may display while the screen is being shared.

### RECORDING A MEETING

The meeting can be recorded for archiving and future reference – this is particularly useful when screen sharing is in progress.

1. Click the  Record icon to start a recording the meeting activity.
  - o A "● Archiving on" message will be displayed in the bottom left corner of the meeting window to indicate recording is in progress.
2. Click the  Stop Record icon to stop the meeting recording.
  - o The recording will be available for viewing a few minutes after all participants have left the meeting.

**Notes** The time taken to save the recording will vary depending on the length and content of the recording. In some cases, it may be a several minutes before it is available for viewing.

- More than one recording can be made during a meeting. The recordings are appended to make one video.
- Depending on the browser security settings, an information panel may display while the screen is being recorded. The details shown will vary depending on the browser in use.

### VIEWING PAST OR CANCELLED MEETINGS

The details of past or cancelled meetings can be viewed by all Panel Members.

1. Working on the panel *Meetings* page, click a **meeting title** to open the *Meeting Details* page.
  - o Use the tabs to view the various details of the meeting.

OR

1. Working on the ERN *My Meetings* page, click a **meeting title** to open the *Meeting Details* page.
  - o Use the tabs to view the various details of the meeting.

## VIEW A MEETING RECORDING (ARCHIVE)

If screen recordings were made during the meeting, an additional tab, Recordings will be available. Details of all recordings made during the meeting will be displayed.

1. Working on the *Meeting Details* page, click the **Recordings** tab to view details of recordings made during the meeting
2. Click **Play** to view/start watching a recording.
  - o A toolbar with options to control the progress, volume and screen size is shown with each recording.

## ATTACHMENTS

Files (documents, images, medical images) can be attached to a Patient Record or Consultation Form. The built-in file management tool is suitable for small to medium sized files, up to 1 gigabyte. Larger files can be attached to the *Medical Documents* section of a *Consultation Form* using Secure FTP, see the [Attach Using FTP](#) section below for details.

### ATTACH A FILE OR IMAGE

 Working on the Patient's record, click **Patient Documents** in the *Side Menu* to open the *Patient Documents* page.

OR

 Working on a Panel, click the **Consultation Form** tab to open the *Consultation Form* and select the required **Section**.

- ▶ Files can be attached to the following sections of the *Consultation Form*: Episode Description, Rare Disease Diagnosis, Family History, Special Treatment Intervention and Medical Documents.

1. On the *Patient Documents* page, click the **Attach File/Image** button at the top of the page to start the file upload.



OR

1. On a *Panel Consultation Form*, click the **Attach File/Image** button in the relevant section to start the file upload.

2. Confirm that all patient-identifying data has been removed from the file to be uploaded before continuing.
3. If attaching a DICOM study to the *Medical Documents* section of the *Panel Consultation Form*, the click the **Dicom Study (.dcm)** option to change upload type.
4. Drag the file to be uploaded into the box provided.
  - o More than one file can be uploaded at a time.
  - o Click in the box to open a file browser to search for and select the file.
5. Click **Attach** to upload the file and attach it to the patient record.

**Notes** Files attached to a patient record are not displayed in the patient panels and are not visible to users outside of the enrolling centre. For this reason, documents associated with a patient panel should be attached through the panel, rather than the patient record.

- Files attached to a *Panel Contribution* do not get attached to the panel or patient records, and cannot be viewed elsewhere.

## VIEW AND MANAGE ATTACHMENTS

-  Working on the Patient's record, click **Patient Documents** in the *Side Menu* to open the *Patient Documents* page.
    - A list of all files attached to the patient record, including those uploaded within panel *Consultation Forms* will be displayed.
  -  Working on a Panel, click the **Consultation Form** tab to open the *Consultation* form.
    - The files attached to the *Consultation Form* will be listed within the relevant section of the form.
  -  Working on a Panel, click the **Attachments** tab to open the *Panel Attachments* page.
    - A list of all files attached to the panel *Consultation Form* will be displayed in the appropriate section.
- Note** Files attached to a Panel *Contribution* do not get attached to the panel or patient records; they must be viewed at Panel *Contribution*.



The options available on the  menu beside the attachment details will differ, depending on the user's permission or where the attachment list is viewed. For example, when viewing a *Consultation Form*, only the View option is given, whereas while editing a *Consultation Form*, all options are available.

The options on the  menu are:

<b>View</b>	The attachment will open in the built-in viewer.
<b>Rename</b>	After selecting Rename, type the <b>new name</b> in the box provided and click <b>Rename</b> to save the change.
<b>Delete</b>	After selecting Delete, click <b>OK</b> to confirm the action and remove the attachment.
<b>Download</b>	After selecting Download, confirmation may be required depending on the browser settings.

## THE ATTACHMENT VIEWER

The built-in attachment viewer opens in a pop-up modal. Once the *Attachment Viewer* is open, all attachments for the selected panel or patient can be viewed using the left-hand navigation bar.

The built-in viewer will automatically detect the file format and opens the attachment in the appropriate tool; the layout and options available may differ depending on the browser settings.

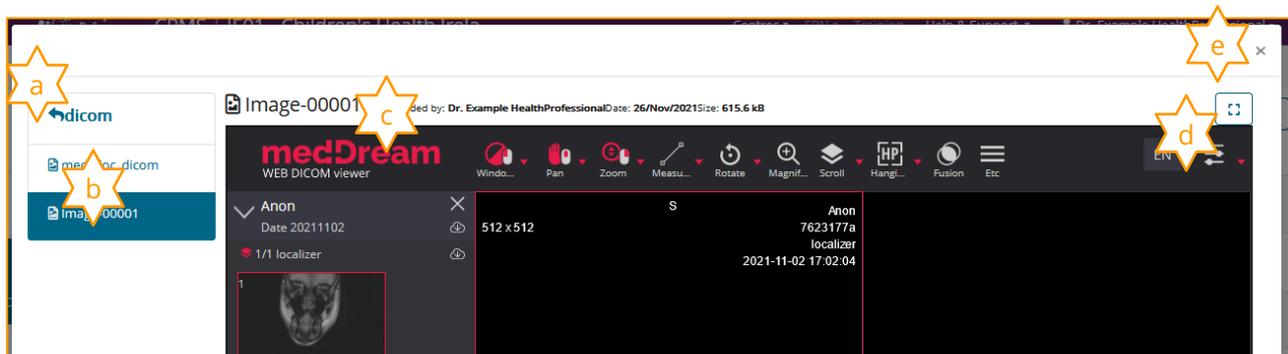


Figure 32 - The Built-in Attachment View with a DICOM image open.

- Click the **↶ arrow** at the top of the left-hand navigation bar to switch between attachment types.
- Other attachments of the same type will be listed in the left-hand navigation bar – click an **attachment** title to switch between attachments.
- The file details are displayed above the attachment display window.
- Click the **☰ ☲ Maximise/Minimise** button at the top of the page to hide or display the left-hand navigation.
- Use the **✕ Close** button at the top of the page to close the *Attachment Viewer* pop-up and return to the original page.

Depending on the file type, a **Download** button may be available at the top of the page.

- Confirmation may be required depending on the browser settings.

**Notes** Medical Document (DICOM) images and files are displayed using the MedDream viewer.

- The built-in viewer used for visualisation of other image attachments is not a diagnostic tool.
- Editable files (e.g., Microsoft Office, Open Format) cannot be viewed using the built-in viewer. The download option should be used for these files.

## PATIENT-IDENTIFYING DATA

The ERN-CPMS system will remove patient-identifying data from DICOM images while uploading them. The software will also remove identifying sections from attached CDA documents. However, it may be unable to remove the data completely.

The software will not attempt to modify other file types, e.g., spreadsheets, document or images, to remove patient-identifying data.

**Note** It is the user's responsibility to ensure that all patient-identifying information is removed before documents or images are attached to the patient record.

## DOCUMENT FORMATS

The supported file formats are listed below:

PDF	pdf				
MS Excel	xml	csv	xls	xlsx	xlsm
MS PowerPoint	ppt	pptx	Pptm		
MS Word	doc	docx	docm		
Open Format Document	odt	ods	odp	odc	odi
Image	jpg	jpeg	bmp	tiff	png
Video	avi	flv	wmv	mov	mp4
Sound	pcm	wav	ogg	flac	mp3
Medical Documents (DICOM)*	dcm				

**Notes** \*Medical Documents (DICOM) can be attached to the *Medical Documents* section of the *Panel Consultation Form* or to a Patient Record.

- The file extension for all files uploaded must be lower case. For example, Word filenames must be example.docx rather than example.DOCX.

## MEDICAL IMAGE VIEWERS

As well as standard file types, such as PDF Files, there are two medical image viewers embedded within the ERN-CPMS system.

The ERN-CPMS system will automatically use the appropriate viewer to open files as they are selected.

## STUDY TYPES SUPPORTED

The following types of exams are supported by the viewers:

- CT scans
- MRIs
- PET scans
- Tomography
- Echographs
- RXs
- Dicom-ised Static Images
- Endoscopies
- Histopathology

## DICOM VIEWER

Medical Document (DICOM) images and files are displayed using the MedDream viewer; it can be used to display radiology scans with full annotation tools.

The viewer is currently certified with CE-marked as a Class 1 medical device, which means that the tool can be used for diagnostic purposes.

## DIGITAL PATHOLOGY VIEWER

The Digital Pathology Viewer (also called Whole-Slide Imaging viewer or WSI viewer) will display specimen images in high definition.

**Note** Users dealing with .ndpi formats should ask the support team for assistance with a conversion process the upload and viewing of this material. See the [ERN-CPMS Support Desk](#) section above for contact details.

## ATTACH USING FTP

The ERN-CPMS system provides the option to upload large files, that exceed the 1Gb size limit for the standard attachment, using secure FTP. Secure FTP Upload also provides more control over file uploads, e.g., scheduling or throttling internet bandwidth usage.

The Medical Documents section of the panel *Consultation Form* includes an option to allow the user to view the Secure FTP configuration settings and set up a password to enable the use of secure FTP.

Files uploaded through FTP will be available for rename etc. using the attachment viewer on the *Medical Documents* section of the *Consultation Form*.

**Note** Upload using FTP requires that third party FTP client software, such as FileZilla or WinSCP, is installed. The user should ask the IT department at their organisation for assistance in configuring and using the FTP client software.

 Working on a Panel, click the **Consultation Form** tab to open the *Consultation Form* and select the **Medical Documents** Section.

▶ Small to medium sized files should be uploaded using the **Attach File/Image** button.

1. Click the **Attach Using FTP** button to open the *Secure FTP Details* pop-up.
  2. Click **Set FTP Password** to set or change the user's password.
  3. Type a password in the box provided.
    - A password must be at least 10 characters – we recommend a combination of upper- and lower- case letters, numbers and special characters.
  4. Confirm the password in the second box.
  5. Click **Set Password** to save the password and return to the Secure FTP details.
- OR
5. Click **Clear** to remove the password.
    - The Secure FTP access will be removed.

## APPENDICES

### ROLES AND RIGHTS

Users working within the ERN-CPMS system are assigned roles within each Centre they work with. The role assigned will affect the actions that the user can take while working with the Centre module – their rights or permission. In some cases, a user may be allocated roles in more than one Centre, with different rights in each one.

Within the ERN module, the users is assigned a role within each ERN they are a member of; additional roles may be assigned within the Panels the user joins. These roles affect the level of participation, and the patient data visible, within the Panel.

A user may be assigned more than one role within a Centre or ERN; the rights and permissions are combined to allow the permissions at the highest level from all roles.

Access rights within a Panel also differ if the user is a guest from another network.

A Health Professional (HP) is usually a Doctor of Medicine, a nurse responsible for general care, a dental practitioner, a midwife or a pharmacist within the meaning of Directive 2005/36/EC, or another professional exercising activities in the healthcare sector which are restricted to a regulated profession. The HP is usually the person who will meet patients within their centre and report for the ERN / panel.

#### GUEST HEALTH PROFESSIONAL USER VS GUEST PANEL MEMBER VS EXPERT ERN GUEST

A *Guest Health Professional* is a user that has been given temporary access to the ERN-CPMS System, usually to allow consultation on a single patient. The Guest HP is not associated with a Centre; instead, a private Guest Virtual Centre is assigned to the user.

A *Guest Panel Member* is a full ERN-CPMS System user that is a member of an ERN and is associated with a Centre. This User has been invited to participate in a Panel from outside of the ERN for the panel.

An *Expert ERN Guest* is a full ERN-CPMS System user that is a member of an ERN and is not associated with a Centre. This User can be invited to participate in Panels from within their ERN, or invited to join a Panel in another ERN as a Guest Panel Member.

### CENTRE PERMISSIONS

**Notes** Users within a Centre have permission only within their own Centre and cannot access data in other Centres.

- In some cases, a user may be allocated roles in more than one Centre.

ROLE	DESCRIPTION
<b>Health Professional (HP)</b>	<p>Within a Centre, a Health Professional (HP) has permission to:</p> <ul style="list-style-type: none"> <li>• Enrol patients.</li> <li>• Record and update patient details, including consent and upload materials.</li> <li>• Create and manage a Panel.</li> <li>• Participate in Panels as a Panel Member.</li> <li>• Request the transfer of patients.</li> </ul> <p>This role is assigned to all users within the Centre.</p>

ROLE	DESCRIPTION
<b>Panel Manager</b>	<p>This role can be added to a HP User in a Centre so that the user can act on behalf of the Panel Lead, for the Centre with certain limitations.</p> <p>See the <a href="#">Panel Permissions</a> section below for details.</p>

## REFERENCE NETWORK (ERN) PERMISSIONS

**Notes** Users within an ERN (Network) have permission only within that ERN and cannot access data in other ERNs.

- In some cases, a user may be a member of more than one ERN.
- Users within an ERN cannot see any Identifying Data for patients outside of their own Centre.

ROLE	DESCRIPTION
<b>Health Professional (HP)</b>	<p>Within an ERN, a Health Professional can view:</p> <ul style="list-style-type: none"> <li>• All panels within their Centre.</li> <li>• Panels they have been invited to/are a member of.</li> </ul> <p>Their permission to participate in the panel will depend on their role within the panel.</p> <p>This role is assigned to all users within the ERN, with the exception of a Researcher.</p>
<b>Network Coordinator</b>	<p>In addition to their HP role in the ERN, Network Coordinators offer support to Health Professionals working within an ERN. They are responsible for responding to Requests for Assistance when selecting a panel.</p> <p>A Network Coordinator can:</p> <ul style="list-style-type: none"> <li>• Forward a Panel to another ERN.</li> <li>• Manage Invitations and provide Panel Assistance.</li> <li>• Assign Panel Managers</li> </ul> <p>In addition to Panel related tasks, Network Coordinators will have additional options in the ERN <i>Side Menu</i>, to assign Panel Managers, view Performance Indicators and manage recurring ERN Meetings.</p>
<b>Dispatcher</b>	<p>In addition to their HP role in the ERN, the Dispatcher offers support to the Network Coordinator, by managing the Request Inbox.</p> <p>They have the same responsibilities as the Network Coordinator with the exception of access to Performance Indicators and ERN Meetings.</p>
<b>ERN Panel Manager</b>	<p>In addition to their HP role in the ERN, the Panel Manager is responsible for monitoring the panel performance and ensuring the smooth workflow of the panel.</p>
<b>Transfer Coordinator</b>	<p>This role can be added to a Network Coordinator profile in an ERN to allow the user to accept or reject transfer requests.</p> <p>There will be one Transfer Coordinator for each ERN. This is usually the Network Coordinator.</p>

ROLE	DESCRIPTION
Researcher	<p>Users with Researcher access to an ERN have additional reports and research tools allowing them to analyse patient data from all panels.</p> <p>This role can be added to a HP user profile or may be assigned without HP permission.</p>

#### PANEL PERMISSIONS

ROLE	DESCRIPTION
Panel Member	<p>Panel Members can:</p> <ul style="list-style-type: none"> <li>• View the Consultation Form.</li> <li>• Record and View Contributions.</li> <li>• Schedule and participate in meetings.</li> <li>• View panel documents.</li> <li>• Add and view comments and tasks within the Timeline.</li> <li>• Request additional data.</li> <li>• View the Outcome</li> </ul>
Panel Lead	<p>The Panel Lead can:</p> <ul style="list-style-type: none"> <li>• Invite Health Professionals within their Network to join the panel.</li> <li>• Carry out all actions within the consultation form and timeline.</li> <li>• Schedule meetings and upload documents.</li> <li>• Sign off, Close and Archive the Panel.</li> <li>• Make data available for research.</li> </ul>
Panel Manager	<p>Within the Panel, this role is a similar to the Panel Lead, without the clinical responsibility; they <i>cannot</i> Sign-off the Panel, but they can Close or Archive a signed off Panel.</p>

#### GUEST USERS (HEALTH PROFESSIONALS)

Guest Health Professional (HP) users are assigned a Guest Virtual Centre, in which they enrol their patients and open Panels for their patients. Guest accounts are revoked after 90 days; this time limit is extended if there are any open Panels associated with the Guest's Patients.

**Note** A Guest User must have an EU login in order to access the ERN-CPMS System.

- The Guest HP cannot be invited to join other Panels.

Module	DESCRIPTION
Centre	<p>Within the Guest Virtual Centre, a Guest HP has permission to:</p> <ul style="list-style-type: none"> <li>• Enrol a patient.</li> <li>• Record and update patient details, including consent.</li> <li>• Create a Panel within an ERN – the ERN coordinator will assign a Panel Lead.</li> <li>• Copy, Restart or Cancel a Panel.</li> </ul>

Module	DESCRIPTION
ERN	<p>The Guest HP will have HP access to participate in the ERN associated with their Patient Panels during the lifecycle of the Panel. Permission will be revoked when the Panel has been closed and archived.</p> <p>The Guest HP can see</p> <ul style="list-style-type: none"> <li>• All panels within their Guest Virtual Centre.</li> <li>• Panels they have been invited to (as a guest).</li> </ul>
Panel	<p>The Guest HP cannot be a Panel Lead.</p> <p>The Guest HP can actively participate in</p> <ul style="list-style-type: none"> <li>• Panels they opened.</li> <li>• Panels they have been invited to (as a guest).</li> </ul>

## SYSTEM REQUIREMENTS

As well as the browsers and settings listed in the [Supported Browsers](#) section above, the following requirements should be confirmed.

### SOFTWARE

To avoid problems with the camera or microphone, other video conferencing applications (e.g., Skype, Zoom, Teams etc.) should be closed while participating in Panel Meetings or Webinars.

Where possible, to ensure a stable connection, video streaming through another browser or application (e.g., YouTube) should be avoided when participating in Panel Meetings or Webinars.

### HARDWARE

In order to participate actively in video conferencing, the PC, laptop or tablet used should be equipped with a camera and microphone and must be enabled within the browser. Depending on the browser settings, confirmation of access to the camera and microphone may be required.

**Note** It is recommended that users test the video and sound before participating in Panel Meetings or Webinars by using the **Test Video** link provided.

### INTERNET SPEED/BANDWIDTH

Depending on the modules being used, an internet speed from 528 Kbs to 4Mbps is required; higher speeds are needed to maintain a stable video connection when participating in Panel Meetings or Webinars.

The internet access speed can be checked using the <https://speedof.me> or <http://www.speedtest.net> websites. Users may experience low quality or dropped video connections if the available internet speed/bandwidth falls below a reasonable threshold.