



BASIC CPMS USER GUIDE FOR FIRST CONNECTION, ENROLLING A PATIENT AND STARTING A NEW PANEL.

1. The main CPMS dashboard

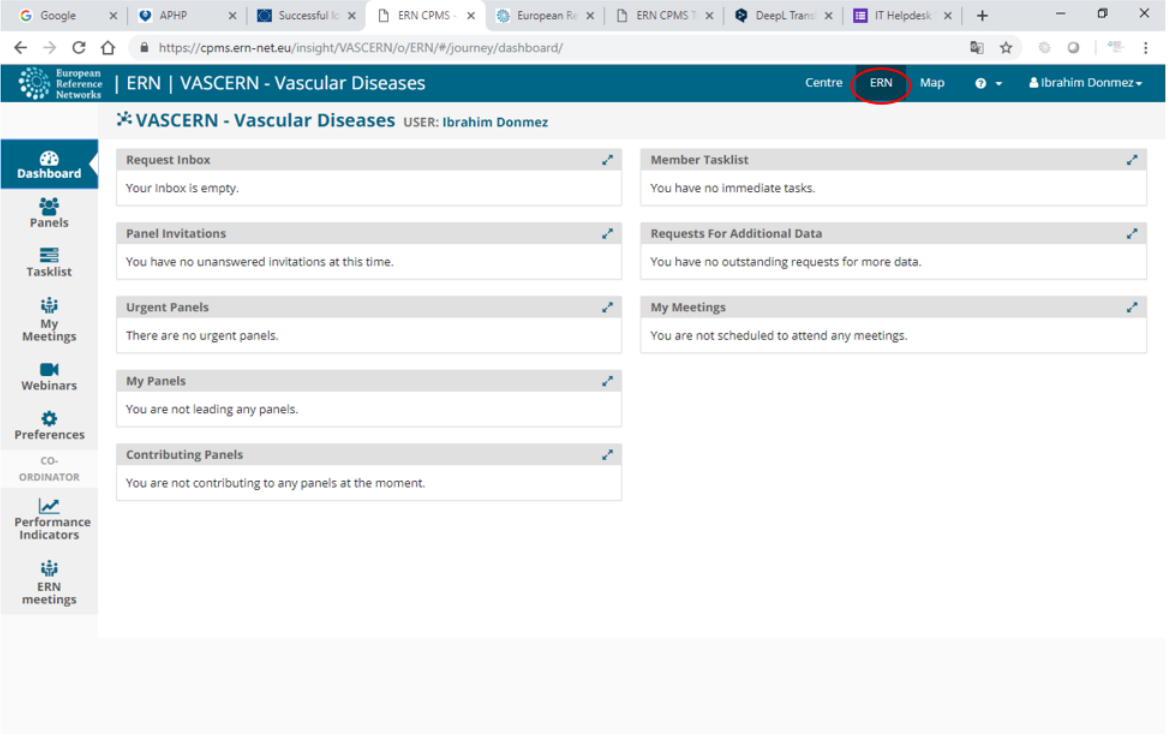
When you first login you will arrive at the main dashboard where you can access your centre's dashboard (**Centre**), your personal (**ERN**) dashboard and an interactive map (**Map**) of Europe with all HCPs per ERN. There are also informative training videos, CPMS user manuals and webinars available at this main CPMS dashboard.

The screenshot shows the CPMS dashboard interface. The top navigation bar includes 'Centre', 'ERN', and 'Map'. The main content area is divided into several sections:

- Apps:** Contains links to 'Centre', 'ERN', and 'Map'.
- Training Videos:** Contains links to 'CPMS Overview (27 min.)', 'Enrol and Remove a Patient (120 s.)', 'Starting a Panel and upload files (120 s.)', and 'Set up a Video Meeting (120 s.)'.
- Webinars:** Contains a list of webinar topics, including 'CPMS Webinar- General introduction', 'CPMS Webinar- How to use the Consultation Form', 'CPMS Webinar- How to form an Expert Panel', 'CPMS Webinar- How to schedule video meetings', 'CPMS Webinar - how to use the Medical Viewer', 'CPMS Webinar- Users Access rights', 'CPMS Webinar- Non-ERN Health Professionals', 'CPMS Webinar - ERN Coordinators', 'CPMS Webinar - CPMS New Features June 2018', and 'CPMS Webinar - CPMS Query Builder'.
- CPMS user manual and documentation:** Contains links to 'User Manual', 'Multi level role-based access', 'Coding systems & Data standards', 'De-identification in CPMS', 'Image Viewer', 'Data Hosting', 'Patient Consent Sample', 'Outcome Document Template', 'Good Practices of the Informed Consent', 'Toolkit and Case Study for Health professionals', and 'CPMS Business Process'.

2. Accessing your personal (ERN) dashboard

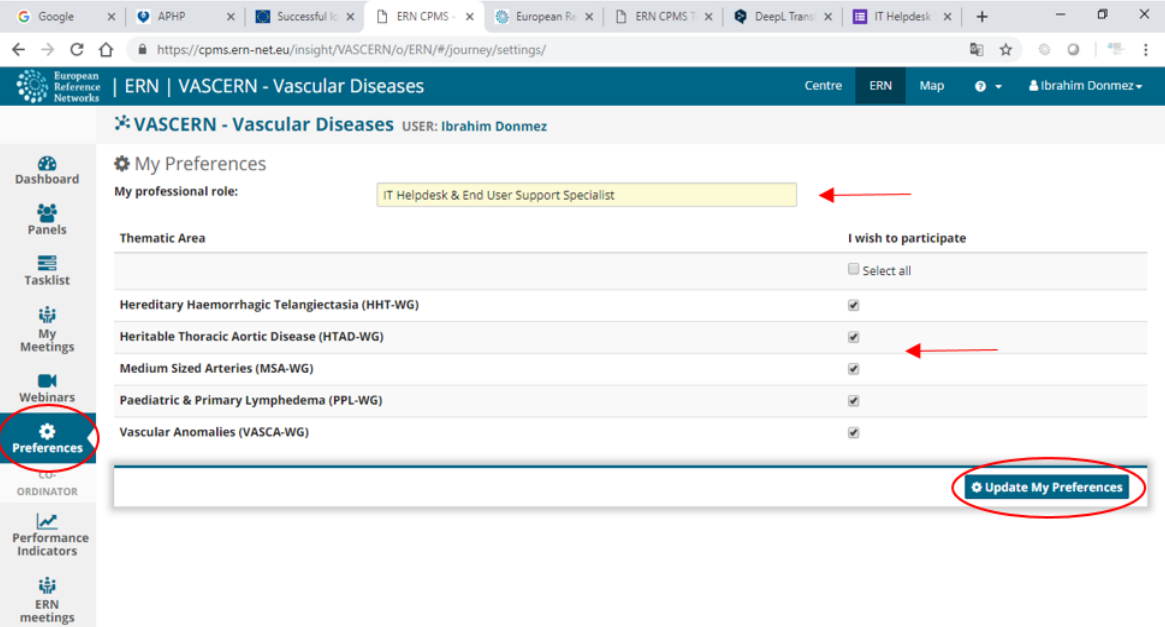
Click the option “ERN” which can be found either under the application box or in the top right heading. You will be directed to your personal dashboard where you can see your tasks (**my task list**), panels that you started (**my panels**), and upcoming meetings (**my meetings**) etc.



The screenshot shows the ERN VASCERN dashboard for user Ibrahim Donmez. The top navigation bar includes 'Centre', 'ERN' (circled in red), and 'Map'. The dashboard is divided into several sections:

- Request Inbox:** Your Inbox is empty.
- Panel Invitations:** You have no unanswered invitations at this time.
- Urgent Panels:** There are no urgent panels.
- My Panels:** You are not leading any panels.
- Contributing Panels:** You are not contributing to any panels at the moment.
- Member Tasklist:** You have no immediate tasks.
- Requests For Additional Data:** You have no outstanding requests for more data.
- My Meetings:** You are not scheduled to attend any meetings.

The left sidebar contains navigation options: Dashboard, Panels, Tasklist, My Meetings, Webinars, Preferences, CO-ORDINATOR, Performance Indicators, and ERN meetings.



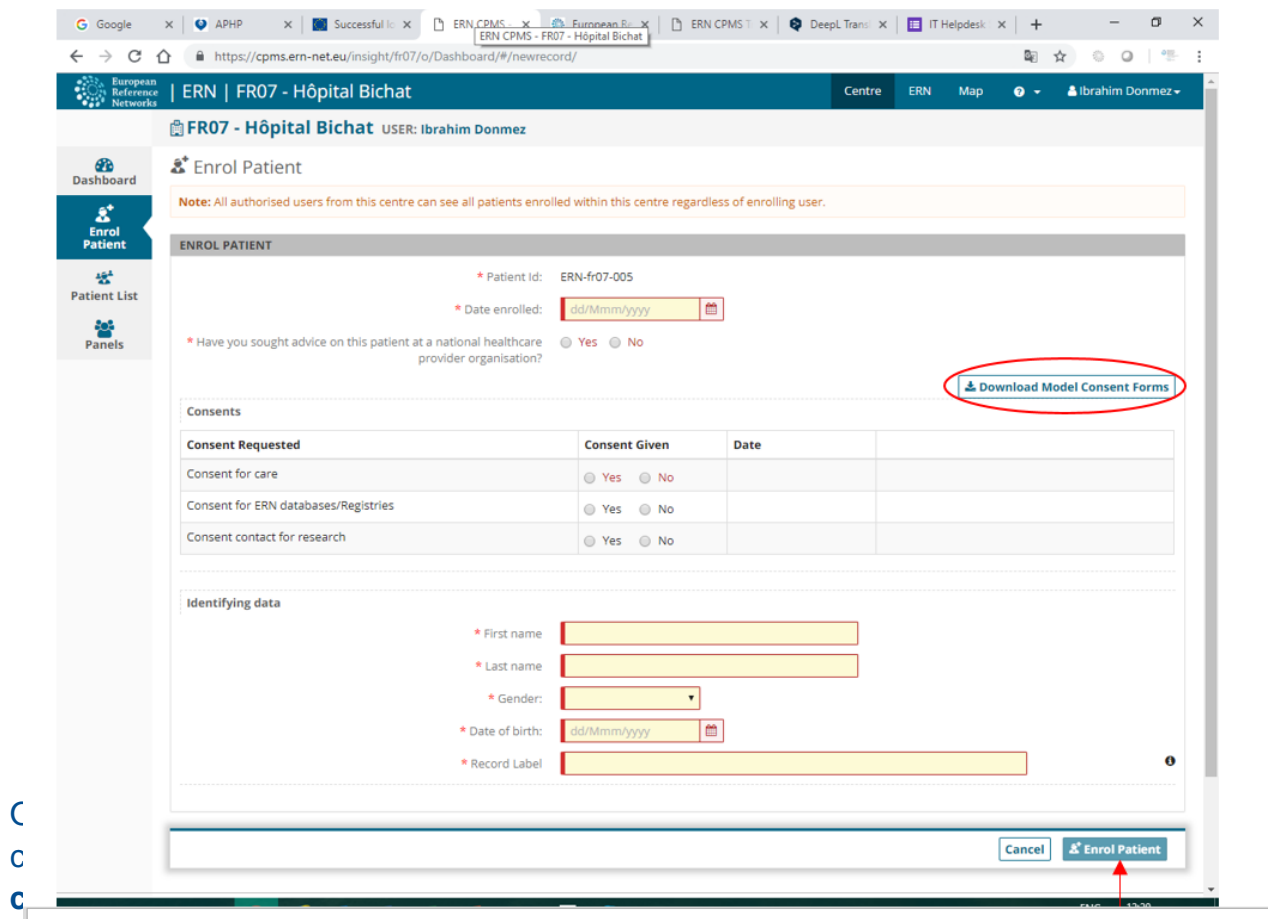
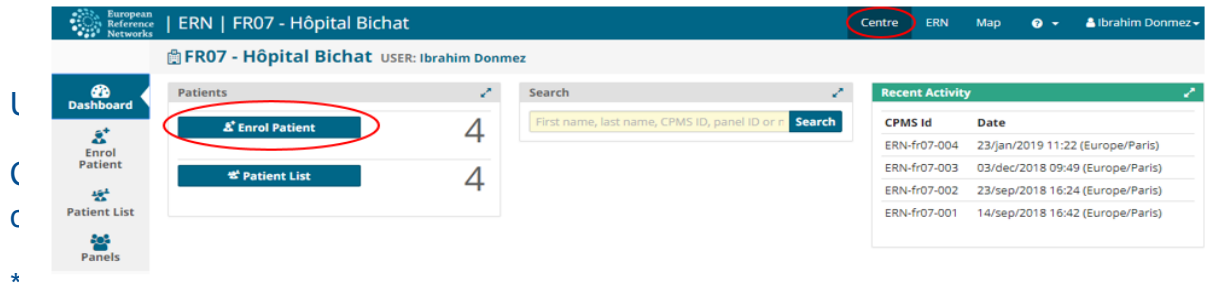
The screenshot shows the 'My Preferences' settings page for user Ibrahim Donmez. The 'ERN' tab is selected in the top navigation bar. The 'Preferences' icon in the left sidebar is circled in red. The 'My professional role' field is set to 'IT Helpdesk & End User Support Specialist' (indicated by a red arrow). The 'Thematic Area' section lists several conditions with checkboxes for participation:

Thematic Area	I wish to participate
Hereditary Haemorrhagic Telangiectasia (HHT-WG)	<input type="checkbox"/> Select all
Heritable Thoracic Aortic Disease (HTAD-WG)	<input checked="" type="checkbox"/>
Medium Sized Arteries (MSA-WG)	<input checked="" type="checkbox"/>
Paediatric & Primary Lymphedema (PPL-WG)	<input checked="" type="checkbox"/>
Vascular Anomalies (VASCA-WG)	<input checked="" type="checkbox"/>

The 'Update My Preferences' button at the bottom right is also circled in red.

4. How to enrol a patient and start a new panel:

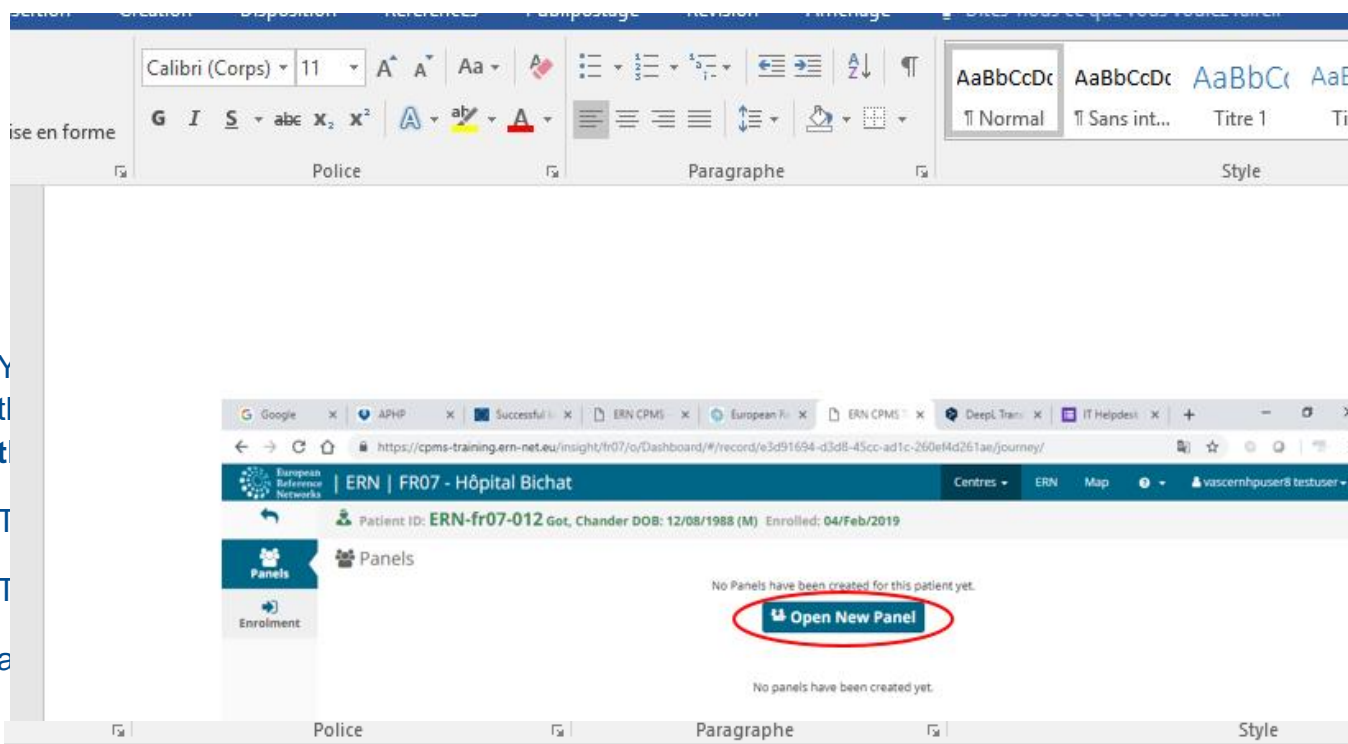
Click on **Centre** (top right tab) and you will arrive at your HCP's dashboard



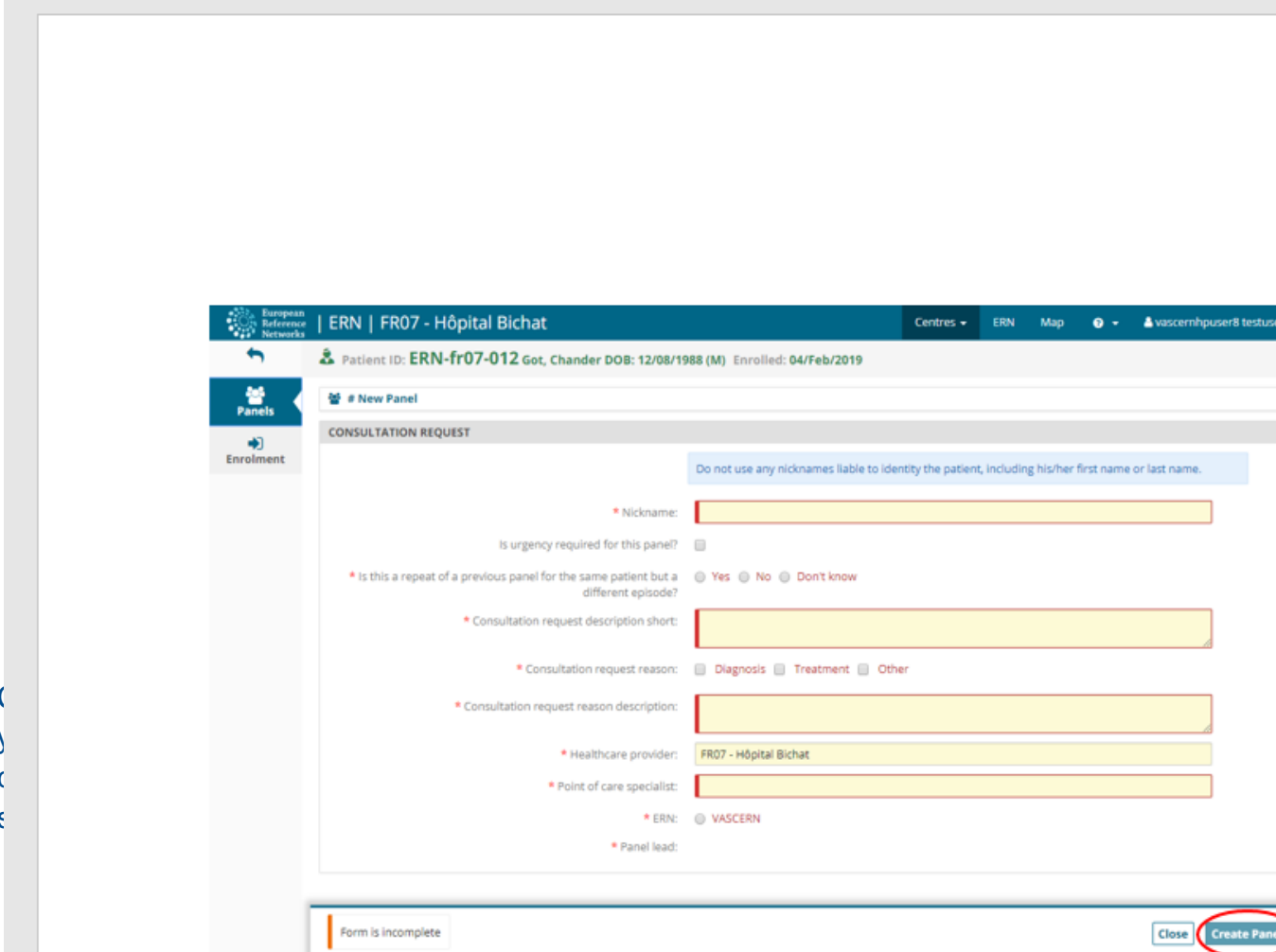
The patient is now enrolled in the CPMS.

5. Creating a new panel

To create a new panel with the patient you have just enrolled click « New panel »



This screenshot shows the ERN patient dashboard for a patient named Got, Chander. The page title is "ERN | FR07 - Hôpital Bichat". The patient ID is ERN-fr07-012, and the enrollment date is 04/Feb/2019. The "Panels" section is active, and a message states "No Panels have been created for this patient yet." A blue button labeled "Open New Panel" is circled in red. The browser's address bar shows the URL: https://cpms-training.ern-net.eu/insight/fr07/0/Dashboard/#/record/e3d91694-d3d8-45cc-ad1c-260e4d261ae/journey/.



This screenshot shows the "New Panel" form for a consultation request. The form is titled "# New Panel" and "CONSULTATION REQUEST". It includes a warning: "Do not use any nicknames liable to identify the patient, including his/her first name or last name." The form fields are as follows:

- Nickname: [Empty text box]
- Is urgency required for this panel?:
- Is this a repeat of a previous panel for the same patient but a different episode?: Yes No Don't know
- Consultation request description short: [Empty text box]
- Consultation request reason: Diagnosis Treatment Other
- Consultation request reason description: [Empty text box]
- Healthcare provider: FR07 - Hôpital Bichat
- Point of care specialist: [Empty text box]
- ERN: VASCERN
- Panel lead: [Empty text box]

At the bottom of the form, there is a "Form is incomplete" message and a "Create Panel" button circled in red.

VASCERN), and the panel lead (doctor responsible for the management of the panel).

Once completed, press **Create Panel**.

There are many other fields in the left side bar **that can also be completed** (e.g. rare disease diagnosis, family history with pedigree, allergies, surgical procedures, medical images (that you can upload and view) but these are not necessary to proceed with the panel selection.

You can always add more information or modify the consultation form using the **Edit** button. You will also notice that there is a **Timeline** on the right side bar that is updated regularly.

The screenshot displays the ERN CPMS training interface for a patient named Jarred, Hammad (Patient ID: ERN-fr07-013). The interface is divided into several sections:

- Header:** ERN | FR07 - Hôpital Bichat. Includes navigation links for Centres, ERN, Map, and user information (vascernhpuser8 testuser).
- Patient Information:** Patient ID: ERN-fr07-013 Jarred, Hammad DOB: 17/08/1985 (M) Enrolled: 04/Feb/2019.
- Progress Bar:** A horizontal bar showing the status of the panel creation process: Open (checked), Panel Selection, Data Completion, Assessment, Outcome, Sign-off, and Closed. A red circle highlights the 'Next >' button at the end of the bar.
- Enrolment Section:** Centre: FR07 - Hôpital Bichat; Lead: vascernhpuser8 testuser; ERN Thematic Area: VASCERN - Vascular Diseases Medium Sized Arteries (MSA-WG).
- CONSULTATION FORM:** RECORDED: 04/FEB/2019 14:48 (EUROPE/PARIS) BY: VASCERNHPUSER8 TESTUSER. A red circle highlights the 'EDIT' button next to the form title. The form contains the following fields:
 - * Nickname: HJ
 - Is urgency required for this panel?: No
 - * Is this a repeat of a previous panel for the same patient but a different episode?: Yes
 - * Consultation request description short: N/A
 - * Consultation request reason: Diagnosis
 - * Consultation request reason description: N/A
 - Healthcare provider: FR07 - Hôpital Bichat
 - Point of care specialist: N/A
 - * ERN: VASCERN
 - * Panel lead: vascernhpuser8 testuser
 - * Primary thematic area: Medium Sized Arteries (MSA-WG)
- TIMELINE:** 04/Feb/2019: A new Panel was started by vascernhpuser8 testuser. A red arrow points to this section.
- Patient Documents:** A table with columns for Created and Last Update. A document is listed with a Last Update of 04/Feb/2019.
- Footer:** Help & Support information, Co-financed by the European Union logo, and copyright information (© 2018 OpenApp Consulting Limited).

6. Selecting Members for a Panel

The screenshot shows the ERN CPMS training interface for a patient named Jarred, Hammad. The 'Panel Selection' step is active, and the 'Available' tab is selected. The 'Thematic Area' is set to 'Vascular Anomalies (VASCA-WG)'. A table of available healthcare professionals is shown, with roles such as Surgeon and Radiologist. A red arrow points to the 'Thematic Area' dropdown, and another red circle highlights the 'Invite' button for a specific professional.

Available Healthcare Professionals	Role	Invite
vascernhpuser1 testuser	Surgeon	Invite
vascernhpuser2 testuser	Radiologist	Invite
vascernhpuser4 testuser	Surgeon	Invite
vascernhpuser5 testuser	Radiologist	Invite
vascernhpuser6 testuser	Surgeon	Invite
vascernhpuser7 testuser	Radiologist	Invite
vascernhpuser8 testuser	Surgeon	Invite

changing the status of one of the members to panel lead.

The screenshot shows the ERN CPMS training interface for the same patient. The 'Invited' tab is selected, and the 'Invited Panel Members' table is displayed. A red arrow points to the 'Set As Lead' option in the dropdown menu for a specific member.

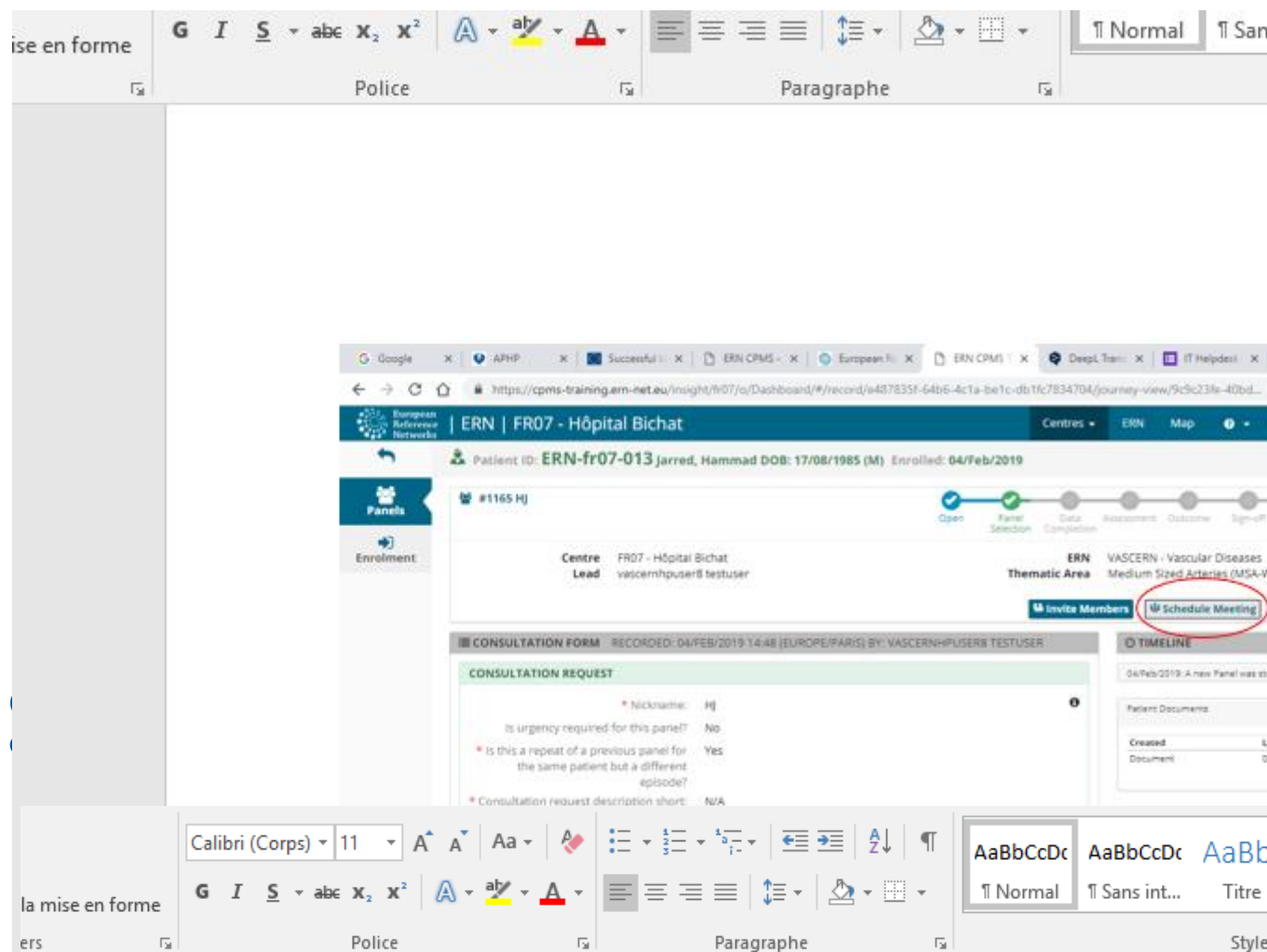
Name	Role	Status	When
vascernhpuser3 testuser		Lead	Invited: 20/
vascernhpuser1 testuser	Surgeon	Invited -	Invited: 20/
vascernhpuser2 testuser	Radiologist	Invited -	Invited: 20/

Please note: For the panel to move forward to the next stage, all panel members **must accept** or reject the invitation! If you pass to the next stage without the members having accepted they will automatically be rejected.

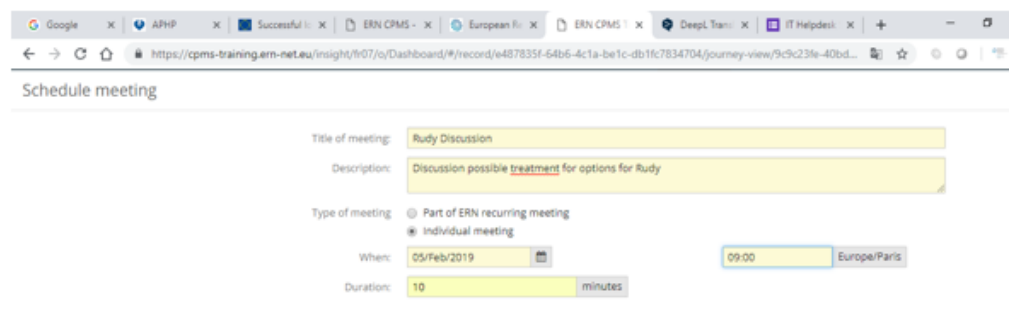
Again, the timeline on the right displays all updates, such as when each member accepts an invitation.

7. Scheduling a panel meeting

If you wish to schedule a meeting at this time (or in at another stage of the panel process) you may do so by clicking the **Schedule Meeting** button located above the timeline.



The screenshot shows a web browser window displaying the ERN patient dashboard for a patient named Jarred, Hammad. The dashboard includes a navigation menu with 'Panels' and 'Enrolment' options. The main content area shows patient details, a progress bar with stages like 'Open', 'Panel Selection', 'Data Completion', 'Assessment', 'Outcome', and 'Sign-off', and a 'CONSULTATION FORM'. A red circle highlights the 'Schedule Meeting' button in the top right corner of the dashboard. Below the dashboard, a second screenshot shows the 'Schedule meeting' form with fields for 'Title of meeting', 'Description', 'Type of meeting', 'When', and 'Duration'.



The 'Schedule meeting' form contains the following fields and values:

- Title of meeting: Rudy Discussion
- Description: Discussion possible treatment for options for Rudy
- Type of meeting: Part of ERN recurring meeting, Individual meeting
- When: 05/Feb/2019, 09:00, Europe/Paris
- Duration: 10 minutes

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Meeting: Rudy discussion

Description: Discuss possible treatment options for Rudy.
 Invited: vascernhpuser1 testuser (Invited), vascernhpuser3 testuser (Host)
 Scheduled: 20/Oct/2017 15:35 (Europe/Copenhagen) for 15 minutes

Join Meeting

vascernhpuser3 testuser 20/Oct/2017 15:33
 Ready?

vascernhpuser3 testuser 20/Oct/2017 15:35
 Anyone here?

Add a comment

ng: Rudy Discussion

Time Participants Summary

Test video Starts in: 0h 45m 21s

Invited	Status
thpuser8 testuser	Host
vascernhpuser1 testuser	Invited

Invite



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ERN | FR07 - Hôpital Bichat

Patient ID: ERN-fr07-013 Jarred, Hammad DOB: 17/08/1985 (M) Enrolled: 04/Feb/2019

#1165 HJ

Centre: FR07 - Hôpital Bichat
 Lead: vascernhpuser8 testuser

ERN Thematic Area: VASCERN - Vascular Diseases Medium Sized Arteries (MSA-WG)

Consultation Form: RECORDED: 04/FEB/2019 14:48 (EUROPE/PARIS) BY: VASCERNHPUSERS TESTUSER

Timeline: 04/Feb/2019: A new Panel was started.

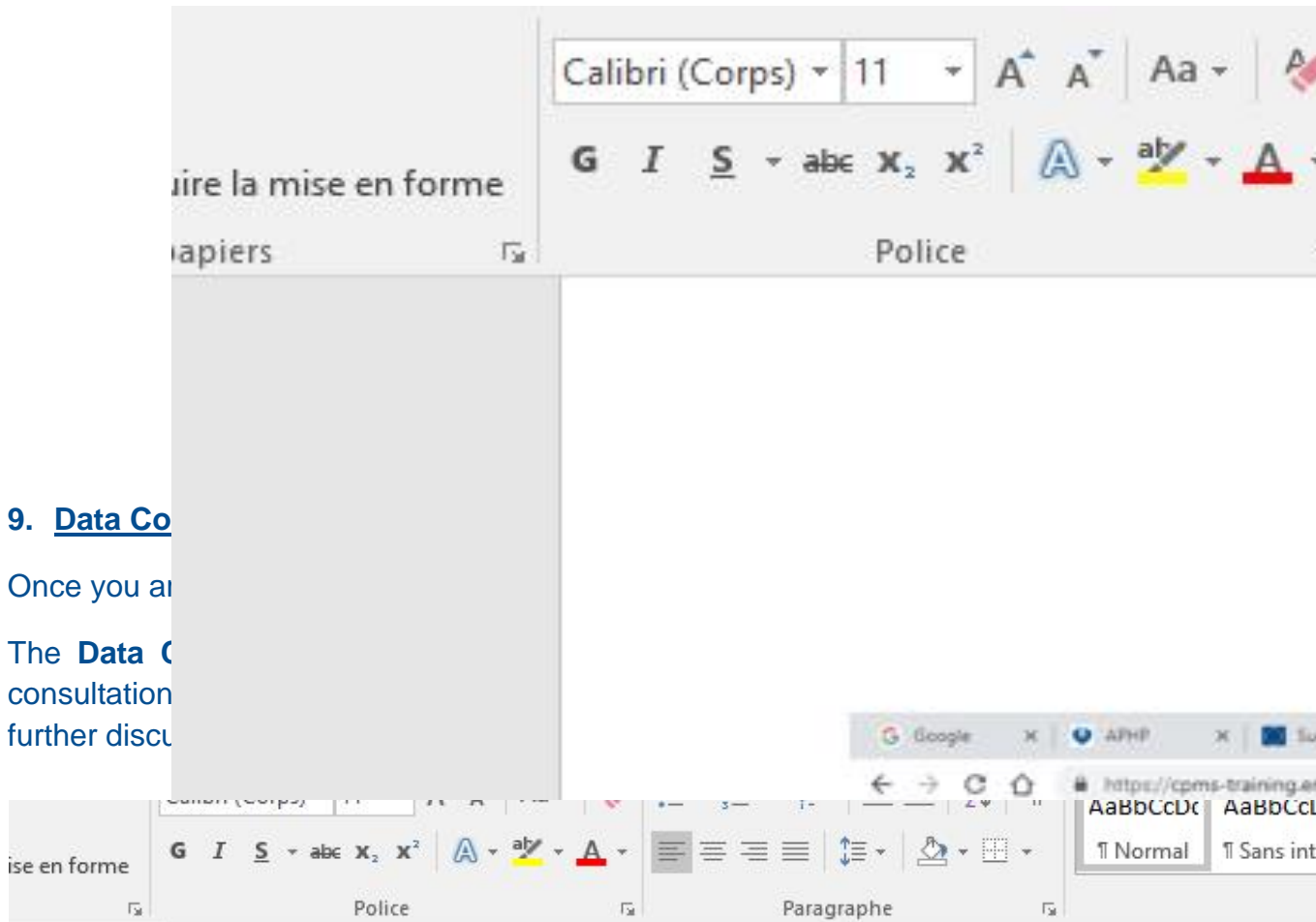
Invite Members Schedule Meeting

Once you have entered the information, you can click on the **Create Request** button located above the timeline to save the data.

9. Data Co

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A screenshot of the ERN patient dashboard for ERN-fr07-013 Jarred, Hammad. The dashboard shows a progress bar with 'Data Completion' highlighted. Below the progress bar is a consultation form with fields for patient information, consultation request, and primary thematic area. An 'EDIT' button is visible next to the form. On the right side, there is a 'TIMELINE' section showing a list of events related to the panel.

At the bottom of the timeline there is a **patient documents** box where you can add comments and chat to other members.

Please note: Before leaving this step you must have uploaded all documents, images, and patient information as once you transition to the **Assessment** stage of the panel, this is no longer possible.

To go back to the previous stage, you can click on the **Previous** button.

10. Assessment Stage

Press **NEXT** to transition to the **Assessment** stage.

Here there is a **Record Contribution** button where members can add comments and discuss the case. Any contributions by panel members can be seen in the timeline under the **Contributions** box.

The screenshot displays the ERN | FR07 - Hôpital Bichat patient record interface. The patient ID is ERN-Tr07-014, and the patient is Doug, Oliver, DOB: 12/06/1988 (M), enrolled on 05/Feb/2019. The record is in the 'Assessment' stage of a panel. A 'Record Contribution' button is highlighted with a red circle. The 'CONSULTATION FORM' section contains details about the consultation request, including the patient's nickname (OD), urgency (No), and primary thematic area (Paediatric & Primary Lymphedema (PPL-WG)). The 'TIMELINE' section shows the panel's history, including its start and current state.

Member	Status
vascernhpuser8	Lead

Created	Last Update
Document	05/Feb/2019

11. Outcome Stage:

At this stage the panel lead reviews all of the information and must complete an **Outcome Report**. The panel lead clicks **Record outcome** and completes the report which details the decisions that have been made by the panel regarding the patient.

The screenshot displays the ERN FR07 - Hôpital Bichat patient dashboard. The patient ID is ERN-fr07-014, Doug, Oliver, DOB: 12/06/1988 (M), Enrolled: 05/Feb/2019. The dashboard shows a progress bar with steps: Open, Panel Selection, Data Completion, Assessment, Outcome, and Sign-off. The 'Outcome' step is currently active. Below the progress bar, the 'Record Outcome' button is highlighted with a red circle. The 'CONSULTATION FORM' section shows a 'CONSULTATION REQUEST' with the following details: Nickname: OD, Is urgency required for this panel?: No, Is this a repeat of a previous panel for the same patient but a different episode?: Yes, Consultation request description short: N/A, Consultation request reason: Diagnosis, Consultation request reason description: N/A, and Healthcare provider: FR07 - Hôpital Bichat. The 'TIMELINE' section shows a list of events, including '05/Feb/2019: A new Panel was started by...' and '05/Feb/2019: The Panel is now in state: Pan...'. The 'Panel Members' table shows the panel lead, vascernhpuser8 testuser, with status 'Lead'.

The screenshot displays the ERN FR07 - Hôpital Bichat patient dashboard, similar to the previous one. The patient ID is ERN-fr07-014, Doug, Oliver, DOB: 12/06/1988 (M), Enrolled: 05/Feb/2019. The dashboard shows a progress bar with steps: Open, Panel Selection, Data Completion, Assessment, Outcome, and Sign-off. The 'Outcome' step is currently active. Below the progress bar, the 'View Outcomes' button is highlighted with a red circle. The 'CONSULTATION FORM' section shows a 'CONSULTATION REQUEST' with the following details: Nickname: OD, Is urgency required for this panel?: No, Is this a repeat of a previous panel for the same patient but a different episode?: Yes, Consultation request description short: N/A, Consultation request reason: Diagnosis, Consultation request reason description: N/A, and Healthcare provider: FR07 - Hôpital Bichat. The 'TIMELINE' section shows a list of events, including '05/Feb/2019: A new Panel was started by...' and '05/Feb/2019: The Panel is now in state: Pan...'. The 'Panel Members' table shows the panel lead, vascernhpuser8 testuser, with status 'Lead'.

Sign-off stage and “sign-off” on the panel outcome. The final outcome document can be downloaded by all members of the panel, to send to the point of care specialist or to the patient.

The panel lead then presses **NEXT** to transition to **Closed**. Here they must state how many hours were spent on the panel (important KPI for reports), if it was a success and if the outcome was for diagnosis, treatment, clinical trial or other use.

The screenshot shows a web application interface for a patient panel. At the top, a progress bar indicates the current stage is 'Sign-off'. Below this, the patient's details are shown: Centre (FR07 - Hôpital Bichat), Lead (vascernhpuser8 testuser), ERN (VASCERN - Vascular Diseases), and Thematic Area (Paediatric & Primary Lymphedema (PPL-WG)).

A modal dialog box titled 'Transition to Closed' is open. It contains the following text and form elements:

- Message: "You have chosen to transition to a new state, **Closed**."
- Warning: "This is an irrevocable action! When you close this panel it is still visible within the ERN but a closed panel cannot be restarted."
- Section: "Questionnaire"
- Form fields:
 - "How much time did you spend on this Panel?" with input fields for "HRS" and "MINS".
 - "Was the panel a success?" with radio buttons for "Yes", "No", and "Not Determined".
 - "What was the Outcome?" with checkboxes for "Diagnosis", "Treatment", "Clinical Trial", and "Other".
- Buttons: "Cancel" and "Continue to Closed".

This screenshot shows the patient's consultation form and timeline. The patient is identified as ERN-fr07-014 Doug, Oliver, DOB: 12/06/1988 (M), enrolled on 05/02/2019.

The consultation form is titled "CONSULTATION REQUEST" and contains the following data:

- Nickname: DD
- Is urgency required for this panel?: No
- Is this a repeat of a previous panel for the same patient but a different episode?: Yes
- Consultation request description short: N/A
- Consultation request reason: Diagnosis
- Consultation request reason description: N/A
- Healthcare provider: FR07 - Hôpital Bichat
- Point of care specialist: N/A
- ERN: VASCERN
- Panel lead: vascernhpuser8 testuser
- Primary thematic area: Paediatric & Primary Lymphedema (PPL-WG)

The timeline on the right shows the following events:

- 05/Feb/2019: A new Panel was started by vascernhpuser8 testuser
- 05/Feb/2019: The Panel is now in state 'Panel Selection'
- 05/Feb/2019: The Panel is now in state 'Data Completion'
- 05/Feb/2019: The Panel is now in state 'Assessment'
- 05/Feb/2019: The Panel is now in state 'Outcome'
- 05/Feb/2019: The Panel is now in state 'Sign-off'

If the patient has consented to include their information for « ERN database of Registry » (one of the choices of the consent form) then when the panel is archived de-identified data will be stocked in the ERN Registry.

For more information, please read the *CPMS User Guide & Reference Manual* available on the main CPMS dashboard under “User Manual”.