ePPOC Patient Information Centre

User Manual
Version 1.6
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1 Introduction

Welcome to epiCentre! epiCentre is the software for entering and managing data relating to the electronic Persistent Pain Outcomes Collaboration (ePPOC).

The purpose of ePPOC is to provide outcomes-based benchmark reporting for pain management clinics throughout Australasia. It involves use of a standardised dataset, data collection protocol and regular submissions of de-identified data for analysis and reporting.

As the software at the heart of ePPOC, epiCentre provides an easy-to-use way of collecting the required data which conforms to the ePPOC protocol. The minimum dataset includes a broad range of assessment tools and data items which have been selected to encompass the multidimensional nature of chronic pain. In the ePPOC dataset, there are two types of data collection: clinician provided data and patient reported outcomes. In order to create a flexible solution epiCentre is integrated with an online data collection tool called ‘REDCap’.

REDCap is written and maintained by Vanderbilt University in Tennessee, USA and is an online survey tool. REDCap is hosted on a web server in a secure data centre at the University of Wollongong. epiCentre is able to create questionnaires on the REDCap server, and to automatically synchronise the data between REDCap and your organisation’s epiCentre database. This integration has been implemented in such a way that REDCap never stores, or even sees, any identifiable data about the patient.

The patient questionnaires are created in REDCap. epiCentre and REDCap support the completion of these questionnaires by either the patients themselves or by clinical staff, depending on the preference of each facility. This means that in practice, patient reported outcomes in ePPOC can be collected via a variety of methods.

The purpose of this document is to equip you, the user, with the knowledge to use epiCentre for collecting and using ePPOC data.
2 Using epiCentre

epiCentre’s user interface can be divided into 3 parts;

- The view screen
- The navigation menu bar
- The workflow menu bar

At the top of the screen, a *navigation menu* bar will help the user navigate between the different views of epiCentre. What is displayed on the *navigation menu* bar will depend on the role of the user. Only Administrators and Managers will be able to access the *Users page*, as well as the *Facility page*. All users will be able to access the *Patients page*, the *Questionnaires page* and the *Settings page*.

In the middle of the screen, the view screen is the main frame where the content of the pages is displayed.
The automated workflow manager at the bottom of the screen shows the different types of patients who need to be followed up.

- **Sent Quest to Follow up** – patients who have not returned a questionnaire within 2 weeks of receiving it
- **Post discharge quest. to send** – patients who have finished their episode and need a 3 to 6 month follow up questionnaire sent to them
- **Patients to review** – patients who have not had any activity within epiCentre for 90 days.

Reviewing each of the different patient groups listed in the workflow manager on a weekly basis will help keep on top of outstanding questionnaires and where patients are up to with their treatment.
3 Patients

3.1 Overview

epiCentre’s core functionality is organised around the patients. Creating and searching for a patient has been made as easy as possible in order to provide fast and intuitive access to relevant data. epiCentre enables you to create, edit or delete patients. epiCentre also allows you to access details on the treatment details for your patient and details on the questionnaires that have been completed.

3.2 Patient page

Users can create a new patient by clicking on the *Add a new patient* button on the top right corner of the view screen.

Double clicking on the row of the table will take you to the episode information detail for that patient.
Users can also search and sort patients using the patient list header and the patient search bar.

| 132 | Test | Test | 2/12/1952 | 01/02/2016 | remick@cov.edu.au |

Each row in the patient list represents a patient. Icons on the right hand side of the table allow the user to:

- edit a patient
- access episode information detail
- access the questionnaire related to this patient
- view charts and notes
- delete the patient
- archive the patient
3.3 Adding a patient

Clicking on the button (above) which is located on the top right hand corner of the view screen will open the patient details form (next page) which asks the user to enter the new patient’s information.

The patient details view is divided into two tabs:

- Patient information
- Questionnaire items

### Patient Information

The patient information form includes the *ePPOC Patient ID* and the following mandatory information:

- Medical Record Number
- family name
- given name
- date of birth
- gender
It also includes contact details which are not mandatory but may be useful to have in one place:

- street
- city/suburb
- state
- postcode
- home phone number
- work phone number
- mobile phone number
- email
- urgency

Questionnaire items

The Patient Details screen also contains the questionnaire items that will be populated automatically when the patient’s response to an initial questionnaire is received.

Questionnaire items encompass:

- country of birth
- need for an interpreter
- hearing or sight impairment
- need for help with communication
- indigenous origin of the patient
Clicking on *Cancel* or pressing the escape key on the keyboard will close the patient details form without saving the data. Clicking on *Submit* or pressing the enter key on the keyboard will first check for data validity and potential duplicate patients before saving the data.

If you add a new patient that has the same last name and date of birth as a patient that already exists in the database, you will be asked to indicate whether this is in fact a new patient, or an existing one. Clicking on “Ignore” will create the patient and add it to the list. Selecting the patient (by clicking on the button next to the patients name) and clicking on “Duplicate” will not create a new patient but instead show the selected patient with the same name and date of birth.

In both cases, the patient will be displayed on the Patient List.

### 3.4 Data Validation

In epiCentre, invalid data is reported in 3 ways:

- a clear error message is displayed on the form, in red at the top of the form
- the field itself is displayed in red
- a tooltip will appear when the mouse is held over the field giving more details on the reason the data is invalid
Please correct the following error:
- The patient’s first name is mandatory and less than 32 characters long.
3.5 Editing a patient

Clicking on the pencil icon will allow the user to edit a patient. The Patient Details view will be opened prepopulated with the patient’s data. The user will then be able to edit any field. When clicking on Submit (on screen) or pressing enter on the keyboard, the validity of the data will first be checked before being updated. Pressing Cancel or the escape key on the keyboard will close the form without updating the data.

3.6 Viewing Charts and Notes

Clicking on the chart symbol will open an individual patient’s chart. On that page, the user will be able to view the progress of the patient based on their answers to the questionnaires at different time points in their patient journey.

Under each chart displayed is a blue button allowing you to export the chart from epiCentre as an image.
This form will also allow you to add, edit and delete notes for the patient.

On each Note left, clicking on the pencil will allow you to edit it.
Clicking on the x will delete the note.

3.7 Deleting a patient
Clicking on the rubbish bin will delete a patient. Deleted patient will be hidden from the list of patients and won’t be included in the data that you extract for ePPOC or your own research. Deleted patients appear in light pink. While it is possible to recover deleted patients by clicking on the rubbish bin, you should only delete patients who have been added in error, or if you have been practicing using ePPOC with a ‘dummy’ patient.

3.8 Archiving a patient
Archiving will hide the patient from the display without deleting from the system. Archiving a patient will also remove their episodes, pathways, service events and questionnaires from the display without deleting them from the system. This is a convenient way of hiding patients who have completed their treatment at your service. They are still included in the data that you extract for ePPOC and for your own research. If a patient is archived in error, they can be restored by clicking again on the archive button.

3.9 Searching and filtering patients
Finding a patient is facilitated by the patient search bar which will filter the list of patients. The user can also sort the list based on the fields displayed in the Patient List header by clicking on the field by which they want to sort.
Patient Search Box

Patients can be searched in the search box by any of the following:

- first name
- last name
- medical record number
- or ePPOC Patient ID

The filtering will be performed automatically based on the information entered in the patient search mode. The filter can either be a partial match to the patient's name or a search on the ePPOC Patient ID depending on the patient search mode selected on the top right of the form.

The search will be processed when the user clicks on the magnifier icon or when pressing the enter key and content is in the patient search box.

Patient Filters

Clicking on “Show More” will open the patient filter box. The patient filter box allows you to search your patient based on:

- the first name
- the last name
- the medical record number
- a timeframe for their date of birth
- a timeframe for the referral date
- the urgency of the patient (Low, Moderate, High)
- whether the patient is active or not (i.e. archived)
- whether the patient has been deleted

Clicking on search will filter the list of patients and only display the patients that match the criteria entered. Deleted patients will be displayed in light pink. Archived patients will be displayed in light grey.
Sorting

By default the patient list sorted by ascending family name. Clicking on the fields in the header of the patient list will change the sorting order.

4   Patient episode details

4.1   Overview

Clicking on the stethoscope icon or double clicking on the individual patient line will open the patient episode details screen.

The patient episode details page includes information about the different therapies and services provided to the patient. The user may create, update and delete Episodes, Pathways and Service Events through this page.
4.2 Episode details page

At the top of the page the patient description allows the user to easily see the patient’s name, unique patient ID and date of birth, navigate back to the patient list or browse the patient related questionnaires or, when applicable, delete a patient.

4.3 Patient Description

4.4 Episodes
4.4.1 Entering episode data

The process to enter data for an episode can be divided into three parts:

- New episode (created at referral)
- Start episode (assessment or treatment start whichever comes first)
- End episode

The three buttons in the episode action bar describe these steps of the process. In order to prevent invalid data entry, buttons are only enabled when the action they represent is logical. If the action is disabled, the button will be greyed and a tip will be displayed when the mouse is held over it to give more information about why the action is prevented.

When enabled, clicking on a button will allow the user to enter the mandatory data.

4.4.2 Editing episode details

The user is able to edit episode data if necessary clicking on the pencil icon. This will open the episode details page:
This page encompasses data from the episode as well as referral data and compensation information. This information is only editable if the state of the episode allows. For instance, the episode end date can only be edited if the episode has already been ended via the action buttons.

The questionnaire items tab of the page will be automatically filled once the initial questionnaire is filled by the patient and contains information relating to:

- the pain duration of the patient for that episode
- the cause of the pain
- other comorbidities
4.4.3 Deleting an episode

An episode can be deleted by clicking on the rubbish bin. This action is only available if a questionnaire or pathway has not been attached to the episode.

4.4.4 Filtering an episode

The episode can be filtered using the filter button on the left of the episode list. Clicking on reset removes the filter. For instance if you are looking for all the pathways and services that happened during the episode 1, a click on the filter link for the episode 1 will update the page to show data only related to episode 1.
4.5 Pathways

4.5.1 Entering pathway data

The process for a pathway can be divided into:

- pathway start
- group program start (for concurrent pathways only)
- group program end (only after a group program has been started)
- pathway end

Clicking on one of the four pathway buttons will allow the user to enter the mandatory data related to the pathway. Pathway details may be edited by clicking on the pencil icon. A pathway can be deleted only if no service event data and no questionnaires have been attached. Clicking on filter on the left of the pathway list will allow the user to filter the service event list.

4.6 Service events

The service event panel is located on the right of the episode and pathway details panel and allows the user to add a new service event to any episode or pathway, filter, edit or delete a service event.
4.6.1 Adding a service event

To enter a service event the user will need to select the episode and pathway from the drop down menu. The user will then need to enter the date the service event occurred and select the type of service event from the drop down menu. Lastly the number of minutes the event took will need to be entered before clicking ‘add’ to save the new service event data.

4.6.2 Editing service event details

Clicking on the pencil icon opens the service event details form (above) populated with the details of the event selected. Clicking on Submit will update the service event after validation. The Cancel button will close the form without saving the new data.

4.6.3 Deleting a service event

Clicking on the rubbish bin icon will delete the service event selected.

4.7 Patient Notes

The patient notes allow the user to store any text you would like to record regarding the patient. You will need to type the text and click on add. The text will then be displayed underneath.
5 Questionnaires

In epiCentre there are two pages for managing questionnaires. The first, ‘Patient Questionnaires’ is used for viewing a list of questionnaires for a specific patient. This is accessible from the Patient list or by clicking ‘Browse Questionnaires’ when viewing a specific patient’s ‘episode detail’ page. The second, ‘Questionnaires’, is used for viewing all questionnaires for the facility. These pages are very similar; however there are slight differences in available functions which will be explained in the following sections.

5.1 Patient questionnaire page

5.1.1 Overview

The ‘Patient Questionnaires’ page displays a list of questionnaires which belong to the patient selected. Most of the features of this page are similar to the Questionnaires page. However, some actions such as the ability to create Ad-hoc questionnaires or the process used to refresh questionnaires are specific to this page.

5.1.2 Patient questionnaires page
5.1.3 Print questionnaires

Clicking on *Print Questionnaires* opens a list of questionnaires which can be opened and printed in a pdf file. Adult pain clinics can select initial or follow-up questionnaire which can then be printed by the user.

5.1.4 Refresh questionnaires

Four actions are processed when clicking on the *Refresh questionnaire* button:

- **Synchronisation of sent questionnaires with REDCap** - Clicking on ‘Refresh Questionnaires’ pulls data from the REDCap database and allows epiCentre to receive data from the patient.

- **Expiration of questionnaires** - Questionnaires are only active for a period of time. This period of time can be defined by each clinic. The default setting is 4 weeks. Users will also be reminded that a questionnaire has been issued and is awaiting response after a period of time. The default period of time for questionnaire reminders is 2 weeks but can be customised to your service. Clicking on ‘Refresh questionnaires’ will cause questionnaires to expire if a response has not been received after the expiration deadline.

- **Pathway review questionnaires creation** - If a pathway has been open for more than 6 months a pathway review questionnaire will automatically be generated in epiCentre and added to the list of required questionnaires to be sent to the patient.

- **Episode follow-up questionnaires creation** - A follow-up questionnaire should be created three months after an episode is finished. Clicking ‘Refresh questionnaires’ will generate these questionnaires for episode that ended 3 months ago and place them in the queue of required questionnaires.
5.1.5 Add a questionnaire

A user may want to send an ad-hoc questionnaire to a patient. Clicking on ‘Add a questionnaire’ will open the questionnaire generation form and enable the user to send an ad-hoc questionnaire.

Ad-Hoc questionnaires are questionnaires that are requested on-demand. They are not generally included in the ePPOC reports, although in order for them to make sense for the ePPOC team, it is now possible to define a short description. Hovering the mouse over the “Ad-Hoc” category will display an editable text box. Clicking on the Ad-Hoc category will pin the box on to the page and let you edit the short reason before clicking on “Submit”.

5.1.6 Questionnaire workflow bar

The questionnaire workflow bar offers 7 buttons that show the status of all of the questionnaires. The number in each box shows how many questionnaires there are in each category. For a more detailed explanation of the workflow for managing questionnaires, please see the section ‘Tracking and following up Questionnaires’. Below is the definition of each questionnaire category;

- **All** - By default the user will see all questionnaires.
- **Do it later** - Filters the questionnaire list so that it only displays questionnaires that are waiting to be sent.
- **Awaiting Response** - Filters the questionnaire list so that it only displays questionnaires that have been sent and are still active.
- **Requires Follow-up** - Filters the questionnaire list so that it only displays questionnaires that have been active longer than the pre-defined follow-up period. These questionnaires could be sent again in order to increase response rates.
- **Received** - Filters the questionnaire list so that it only displays questionnaires for which an answer has been received. Received questionnaires still require input from a clinician to complete the medication section before they can be moved to the completed category.
- **Completed** - Filters the questionnaire list so that in only displays questionnaires for which an answer has been received and a clinician has completed the medication component of the questionnaire.
• **Not Received** – These questionnaires are now inactive as the patient has not answered within the designated timeframe. Answers will still be received when clicking on Refresh Questionnaire but only on that page, not on the group questionnaire page.

5.1.7 **Questionnaire list header**

The questionnaire list header helps the user to utilise advanced ordering based on:

- episode identifier
- pathway identifier, if applicable
- pathway type, if applicable
- questionnaire category
- questionnaire mode
- requested date (date of the first request for this questionnaire)
- generated date (date of the generation of the questionnaire on REDCap)
- completion date (date of the response from the patient)
- sent status - the sent status will only be enabled if the workflow bar is set to the default state
- completed status - the completed status will only be enabled if the workflow bar is set to the default state

5.1.8 **Questionnaire list**

The questionnaire list can be accessed for each patient by selecting ‘browse questionnaires’ on the patient’s page. This page displays a list of questionnaires on the left and a list of actions on the right allowing the user to cancel/delete a questionnaire or follow-up a questionnaire.

Double clicking on the questionnaire line will open:

- The questionnaire manager page if the questionnaire has been sent
- The Add a questionnaire page if the questionnaire has not been sent yet.
5.1.9 Status of a questionnaire

Double clicking on a questionnaire that appears as “Do it later” in the sent status column will open the questionnaire creation page. Users will have to select the Questionnaire Mode (Email, Post, In Clinic, Phone) and click on ‘Create Now’ Questionnaire.

The ‘Last Questionnaire Information will help the user decide if the questionnaire should be created now, later or never. The Last Questionnaire panel will provide information on the previous questionnaires sent or completed and give advice based on the standard protocol.

The user will then be able to create now, create later or decide never to send the questionnaire. The user will also have to select, for information only, a mode of delivery of the questionnaire.

Once the questionnaire created the user will be able to complete the questionnaire using the online or offline tool. The user will also be able to create an email or a letter for the patient or, at last, to scan or print a QR code opening the online tool on any portable device.
5.1.10 Deleting a questionnaire

Clicking on the rubbish bin icon will delete a questionnaire. Deleted questionnaires can be restored and appear in light pink.

5.1.11 Follow up questionnaires

epiCentre will remind you that a questionnaire has been awaiting response for a certain period of time and that the patient may need to be followed-up in order to increase response rate. Clicking on the arrow icon will let you mark the questionnaire as followed-up.

5.2 View the questionnaire manager

Double clicking on a created questionnaire (in the questionnaires page) will open the questionnaire manager (see image on next page). The questionnaire manager will allow you to easily complete the questionnaire or generate an email to be sent to your patient. Details on the next page define each of the elements of the questionnaire manager;

- **Patient Details**: Shows the name and patient identifier of the patient whom the questionnaire has been created for.
- **Questionnaire Category**: Shows the type of questionnaire that has been created:
  - Episode Referral
  - Pathway Start
- Group Program Start (in a concurrent pathway)
- Pathway Review
- Group Program end (in a concurrent pathway)
- Pathway End
- Episode Follow-up
- Ad-Hoc Questionnaire

**Questionnaire access** will let you access 3 different pages to review or complete the questionnaire.

- Online questionnaires allow the questionnaire to be opened in your web browser. Clicking on “Online” will open the online questionnaire page on your web browser. Clicking on “Copy” will copy the internet address to your clipboard and let you paste it in a document or an email using Ctrl+V.
- Offline questionnaires are the name for the questionnaires inside epiCentre. You do not need to have access to the internet to access these questionnaires. Clicking on “Offline” will open the offline screen.
- Reports are generated based on the answers to the questionnaires as well as all the answers to previous questionnaires. The user will be able to access the report by clicking on “Report”.

**Questionnaire status**: The questionnaire status is the coloured box that contains the status and a list of possible actions for the particular questionnaire. The colour code, status name and list of possible actions are described in 5.5.1.

**QR Code**: The QR code can be scanned with any portable device and will open on that same device the online patient questionnaire.

**Email address**: Shows the email address of your patient if recorded. Double clicking on the email address or ‘Send Email’ will open outlook and prepopulate the recipient and content of the email.

**Email content**: The email content is editable but also customisable for all questionnaires. If you want to know more about how to customise this email, refer to the Facility Settings page.

### 5.2.1 Offline questionnaires

Questionnaires can be completed in epiCentre in the “Update and complete the questionnaire” form. The form is split into:

- A header including the patient name and the questionnaire completion date.
- The body containing tabs. Each tab represents a section of the ePPOC questionnaire.
- A footer for the actions. Here, the user can either cancel changes or validate them.

Before being saved the fields will be validated and errors messages will be displayed for each erroneous field.
5.3 Reports

Once a questionnaire has been completed by the patient and the answer received by epiCentre, the user will be able to read, save or print a report. Reports contain patient scores from all completed questionnaires.
5.3.1 Exporting a report

A report can be exported to pdf or word by clicking on the SAVE AS PDF or SAVE AS WORD buttons on the top of the screen. This action will open a folder explorer.

In order to save the file as a pdf, the user needs to select the folder where the file is to be saved. The user will then enter the file name followed by .pdf. Clicking on ‘Save’ will export the report to the selected folder. Clicking on Export record on left of the top bar will result in the same action.

5.3.2 Printing a report

Clicking on the printer icon in the top bar will open a dialog box that will enable the user to print one or multiple pages of the questionnaire summary.

5.3.3 Navigating a report

Arrows in the top left hand side of the screen are used to navigate between pages on the questionnaire summary.
5.4 Features specific to the ‘Patient Questionnaire’ page

Some features are only available on the Patient Questionnaire page. They are described below.

Ad-hoc questionnaire creation

Because a questionnaire is related to a patient, this is the only page that will allow a user to create an ad-hoc questionnaire since it must be linked to a particular patient.

Clicking on ‘Add a questionnaire’ will let the user pick the category of questionnaire to create based on their availability. For example it is not possible to create 2 referral questionnaires but if a referral has not been created the user will have the opportunity to create a new one.

If the questionnaire the user would like to create is not a questionnaire described by the ePPOC protocol, the user will be able to specify in more details the kind of questionnaire to be created. A selection can be made from the following categories:

- Episode referral
- Pathway start
- Concurrent pathway group program start
- 3 month pathway review
- Concurrent pathway group program end
- Pathway end
- 3 month episode follow up
- Ad hoc – outside of protocol

Clicking on “Create” will open the “Add a questionnaire page” helping you create a questionnaire on-demand.
Refresh questionnaire specificity

Pulling questionnaires from this page will not only pull active questionnaires from the REDCap server but also expired questionnaires for where no answer has been received. Using this functionality is a good way to keep questionnaires alive even after their expiration date and allows the user to ensure that data from the patient is never lost even if they answer after the deadline.
5.5 Questionnaires Page

Like the Patient Questionnaire page, the Questionnaires page shows a list of questionnaires and allows a list of questionnaire related actions. The difference is that the questionnaire page displays all questionnaires for all patients stored in epiCentre.

From the Questionnaires page, users are able to print paper versions of both the initial and follow-up questionnaires. Clicking on Refresh Questionnaires will enable the user to synchronise the questionnaire list with REDCap as well as update the status of the questionnaires if necessary.

This is the page which should be used for following up questionnaires as described in the section ‘Tracking and following up Questionnaires’ as it shows questionnaires for all patients in epiCentre.

5.5.1 Features specific to the ‘Questionnaires’ page

Patient Details

Hovering over the first column of the questionnaires page will provide information about the patient including:

- Patient Name
- Patient Identifier
- Patient phone numbers (home, mobile and work)
- Email
- Referral date

In order to access the patient information, the user is able to click on the individual patient in the same column to open the patient questionnaire page.
Colour code

In order to save space, questionnaire statuses are colour coded according to the following scale:

<table>
<thead>
<tr>
<th>Colour</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue</td>
<td>Do it later</td>
<td>Double click to send your questionnaire</td>
</tr>
<tr>
<td>Grey</td>
<td>Awaiting Response</td>
<td>Double click to enter data. Or view the details.</td>
</tr>
<tr>
<td>Green</td>
<td>Requires Follow up</td>
<td>Click on the areas when you have followed your patient up. Double click to view the report or update the data.</td>
</tr>
<tr>
<td>Yellow</td>
<td>Received</td>
<td>You have filled the office use only details. Double click to view the report.</td>
</tr>
<tr>
<td>Red</td>
<td>Completed</td>
<td>Your questionnaire has been created more than one month ago. Use the offline tool to complete the questionnaire or the individual questionnaire page.</td>
</tr>
</tbody>
</table>

5.6 Tracking and Following-up Questionnaires

Technical limitations of epiCentre means a deadline is required for all questionnaires to be returned by. In order to improve the response rate, a reminder has been introduced for questionnaires that have been waiting for a response for too long. We called this status “Requires Follow-up”.

Services have different policies when it comes to the questionnaire deadline. For that reason each service can define the number of days they allow before a questionnaire is considered as expired and the number of days after which they would like to be reminded to follow-up a patient (see 6.3.1).
6 Managing Users and Facilities

6.1 Overview

Every user who accesses epiCentre must have a username and password. They must also be granted a ‘User Role’. A ‘User Role’ may belong to a specific Facility, or ‘All Facilities’. There are 4 possible types of User Roles. They are listed below, along with the capabilities and features:

- **Administrator:**
  - Create and Delete ‘Facilities’ in the system
  - Create and Delete Users and User Roles for all Facilities and at all Role Levels (i.e. an Administrator can create other users with Administrator role)
  - Ability to run database update wizards when updates to epiCentre are released that require changes to database structure or content.
  - ‘Administrator’ role can only apply to ‘All Facilities’

- **Manager:**
  - Modify the RedCap tokens for the Facility of which they are a ‘Manager’
  - Create and Delete Users and User Roles for the Facility of which they are a ‘Manager’ at the levels of ‘Manager’, ‘User’ and ‘Reader’

- **User:**
  - Can add, edit and delete Patients, Episodes, Pathways, Service Events and Questionnaires for a Facility in which they have the role ‘User’
  - Can run reports

- **Reader:**
  - Can read but NOT create, edit or delete Patient, Episode, Pathway, Service Events and Questionnaires for a Facility in which they have the role ‘Reader’

The role types Manager, User and Reader must apply to a specific Facility. A user may have only one role for each Facility in the system. When the user logs in, they are asked to select a Facility. The system will ensure they have a User Role for that Facility and their permissions will be applied according to the role type they have for that facility. Application of this model enhances security of your data.
6.2 Creating Users and Roles

A user which has an Administrator or Manager role is able to create, edit and delete users and user roles.

6.2.1 Creating a new user

To create a User, the administrator or manager will have to click on the button ‘Add a new User’ opening the user manager page.

On the user manager page, you will have to define:

- First name
- Last name
- Username
- Email
- Password
- Automatic logout

Click on Submit to validate your changes.
6.2.2 Updating an existing user

A user can be updated by clicking on the pencil icon in front of his or her name.

6.2.3 Deleting a user

A user can be deleted if they do not have any role by clicking on the rubbish bin icon in front of their name.

**A user cannot do anything until they are assigned a role.**

6.2.4 Adding a new role

First select the user in the list. Then click on “Add a new role” and select the role you want the selected user to be assigned.

![Role Details]

Once you have created a role for a user in a facility, they will be able to log in to epiCentre for that facility and work with the data for that facility as appropriate to their role.
6.3 Managing Facilities

Managers and Administrator users will also be able to see the Facilities screen. Most installations of epiCentre will only have one facility, which is configured as part of the ‘create database wizard’ (described in the following section).

The Facility screen looks much like the Patient screen, and contains a list of facilities that currently exist. Only an Administrator can create a new Facility, by clicking the ‘Create Facility’ button and entering the facility details. To create a facility that is able to communicate with REDCap, you will need a set of REDCap tokens provided by the ePPOC team at AHSRI. If you enter any tokens on the Facility Edit screen epiCentre will attempt to validate them with REDCap, and report errors if the tokens do not successfully validate.

6.3.1 Editing Facility Settings

Clicking on the spanner in front of the facility you are responsible for will open the “Facility Settings” page.

The Facility Setting page will let you specify:

- Your facility name
- The country in which your hospital is based
- Whether your service is specifically a paediatric service
- Tokens for communication with REDCap
- Shared folder path
- Ability to use the simple service events.
DO NOT SWITCH TO SIMPLE SERVICE EVENTS UNLESS AGREED TO WITH THE ePPOC TEAM.

In general you will not have to update the facility name, the country, the paediatric service or the token fields after epiCentre is initially set up.

### 6.3.2 Configuring Facility Details

The Facility Details page will let you configure:

- A template for your emails to be sent.
- Timeframe for reminders to let you customise epiCentre based on your facility policy. Reminders will be described thoroughly in section 7.

### 6.3.3 Updating emails

epiCentre creates 3 different emails that can then be sent using the questionnaire manager.

The initial email is generated when a referral questionnaire is sent. It is meant to introduce the questionnaire and explain the reason a questionnaire is issued.

The last questionnaire email is to be sent when the last questionnaire is sent to the patient.

All other questionnaires are sent with the ‘follow-up email’.

The emails are all customisable and the user can do so using the same method for each email.

Clicking on the name of the email to be customised in the tab of the “Facility Settings” page will let the user edit the current template for this email. The user can type the text and add 3 different dynamic fields:

- Patient Title
- Patient First Name
- Patient Last Name
- Patient Questionnaire Link
- Questionnaire Expiration Date

Dynamic fields can be added by clicking on the buttons under the text box or adding the appropriate label:
• {PatientTitle} will be automatically changed to your patient’s title.
• {PatientFirstName} will be automatically changed to your patient’s first name.
• {PatientLastName} will be automatically changed to your patient’s last name.
• {QuestionnaireLink} will be automatically changed to display the link to the online questionnaire.
• {ExpirationDate} will be automatically changed to display the expiration date of the questionnaire.
7 Managing reminders

Reminders are a great way to keep track of where each patient is up to in terms of questionnaire completion. There are 3 main types of reminders:

- **Questionnaire reminders**: Will let you know when a patient might need to be reminded about a questionnaire that has been created and needs to be completed.
- **Episode Reminders**: Let you know about a patient that is currently involved in an episode in the clinic.
- **Post Discharge Follow-up Reminders**: Appear when a patient is ready to be sent and complete a 3 to 6 month follow-up questionnaire.

There is only one *Questionnaire state* that can be interpreted as a reminder: Questionnaire to be followed-up. Questionnaires to be followed-up are questionnaires that have been sent but have not been completed yet. epiCentre invites you to make sure that the patient received the email or the letter you sent and to remind your patient by sending another letter, another email, or give your patient a phone call.

User can set when they would like to be reminded. Users can also set when the questionnaire becomes expired. Expired questionnaires can be filled offline, from paper questionnaires or retrieved from the online questionnaire using the patient questionnaire page.

By default, you will be reminded to follow-up a questionnaire 2 weeks after a questionnaire is created and this same questionnaire will expire 4 weeks after the creation date.

On the figure above you can see the ideal ePPOC process. Firstly, the patient is assigned to an episode. During this episode, the patient goes through pathways participating in treatment or treatment. At the end of the pathways, the episode is ended. Some patients can drop out during a pathway or outside of a pathway making it difficult to follow their progress. This is why episode reminders have been implemented into epiCentre.

There are two kinds of episode reminders:

- When a patient is involved in an episode and in a pathway or
- When a patient is in an episode but outside of a pathway.

**In a pathway**: It is often hard to know when a patient has finished a pathway either for administrative reasons or because the boundary is not clear. epiCentre is able to remind users that a patient has been involved in a pathway for a potentially long time. User can then choose to:

- Leave the patient involved in the pathway and be reminded later.
- Leave the patient in this pathway but send a pathway review questionnaire (optional in the ePPOC protocol) and be reminded later.
  - Stop the pathway for this patient and potentially discharge your patient.
• **Outside of a pathway:** Sometimes, a referral questionnaire is sent, no answer is received, or after a pathway, the patient stays in the episode but outside of the pathway. epiCentre can be setup to remind you when a patient is in database but has not been involved in any pathway treatment for a defined amount of time. Users can then decide if they want to be reminded later or want to discharge the patient.

The last type of reminder is the **Post Discharge Follow-up Reminders** reminder. epiCentre is actually able to remind you that a patient is ready to be sent a post discharge follow-up questionnaire. Users will then be able to send the patient a questionnaire or cancel the questionnaire.

### 7.1 How are you reminded?

Reminders creation is one of the tasks that the “Refresh Questionnaires” button does. Users should press this button weekly to ensure questionnaires are refreshed and up to date.

![Refresh Questionnaires](image)

**Questionnaires to be followed up:**

<table>
<thead>
<tr>
<th>QUESTIONNAIRES</th>
<th>Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>All (2)</td>
<td></td>
</tr>
<tr>
<td>Do it later (1)</td>
<td></td>
</tr>
<tr>
<td>Anawting response (0)</td>
<td></td>
</tr>
<tr>
<td>Received (0)</td>
<td>Completed (0)</td>
</tr>
<tr>
<td>Expired (0)</td>
<td></td>
</tr>
</tbody>
</table>

Reminders for questionnaires to be followed-up are displayed in the questionnaire list. The colour coded completion status is **YELLOW**. You can filter the list of questionnaires to only see the questionnaires to be followed-up by clicking on the tab, on top of the questionnaire list called “Requires Follow-up”.

The reminders are also displayed at the bottom of the screen featuring the number of patients to be reminded as shown on Figure 3.

From there the user has the following possibilities:

- Notify the patient. If there is more than one reminder the user can tick the boxes on the left of the name and click on notify patients. Users can also double click on any questionnaire that requires a follow-up.
- Mark as followed-up: In order to mark a questionnaire as followed up, click the button marked as followed-up in the reminder bar. Or click on the “forward” arrow in front of a questionnaire.
7.1.1  Episode Reminders

Episode reminders can be found in the workflow bar at the bottom of the screen. Episode reminders are the patients in the “patients to review”. For patients to review during a pathway, it is proposed to send a Pathway review questionnaire to this patient. This questionnaire is optional for the ePPOC protocol. Once you have reviewed a patient, you can dismiss the notification by clicking on the red X on the right of the name of the patient. You could also tick all the checkboxes on the left of the name and, then click on the button to dismiss notifications.

7.1.2  Post discharge Follow-up reminders

Patients should, accordingly with the ePPOC protocol receive a questionnaire 3 to 6 months after the end of an episode. epiCentre reminds you that a post discharge questionnaire is ready to be created. Post discharge reminders are in the “post discharge quest to send”. Post discharge questionnaires are created in the status “Do it later” in the category “Requires Follow-up” on the questionnaires page as well. You can also filter the list of questionnaires to only see questionnaires to do later by clicking on the search filter “Do it later” on top of the list as shown above.

Post discharge questionnaires are also displayed in the reminder bar at the bottom of the screen as shown in the figure on the left.

Double clicking on a questionnaire will let you create the questionnaire to be sent. You can also tick the box on the reminder bar for one or many questionnaire and click on “Take action” to create and then send one or many questionnaires to the patient.
7.2 How to set up reminders

Reminders can be set up using the Facility Settings feature. Users can find the feature by clicking on “FACILITY” in the top menu bar of epiCentre in order to open the facility description page.

![Facility Settings Form]

Clicking on the pencil in front of the facility name will open the Facility Settings form. The facility settings form contains information about how to setup the template for the email to be sent as well as a tab called “Reminders”. Click on that tab to open the Reminder setting form.

The reminder setting form allows the user to set the number of days between one action and a reminder to be automatically triggered in the 3 categories described below.

7.2.1 Questionnaire follow-up and expiration

Each facility is able to set the number of days between when a questionnaire is created and when a questionnaire requires follow-up in the first text box. The second text box will let you set the number of days between when a questionnaire is created and a questionnaire expires. Once again, an expired questionnaire can still be completed offline or online but only the individual patient questionnaire page will let you retrieve an online expired questionnaire.
7.2.2 Post Discharge Questionnaires

The text box will let you define the number of days between the end of the episode for a patient and the creation of a reminder to send a follow-up questionnaire. The default number of days is 90 days and can be customised. However, the time period should not exceed 180 days.

7.2.3 Patient Review

As mentioned previously, sometimes patients can stay in an episode, in a pathway or outside a pathway without participating in any treatment. Since they are not seen in the clinic, they can be forgotten about. epiCentre lets users set a number of days after which they would like to be reminded of a patient currently involved in a pathway or an episode but outside a pathway but for whom no change has occurred. For example, at the end of a list of appointments with a physiotherapist, a patient may benefit from a pain management program. The pathway is closed but the user does not want to close the episode since the patient may join a group program later. After a few weeks, the patient refuses to be enrolled in the group program and the episode is not closed. As a patient involved in an episode but outside of any pathway, epiCentre will remind the user that this patient may need to be “discharged”. The user can also set the number of days after which they want this to happen by changing the number of days during a pathway or outside a pathway.
8 Sending Letters

epiCentre 1.6 comes with a template letter that users can customise to automatically print a personal letter for each patient.

8.1 How to print the letter?

A letter can be printed for each questionnaire. Printing it is a matter of finding the questionnaire for which the letter needs to be printed and then click on print questionnaire. This is how;

Finding the questionnaire

A questionnaire can be found in two places. The first is in the “Questionnaires” list by clicking on the “Questionnaires” button in the menu bar. This list shows all the questionnaires available for all patients. Clicking on “Search” will open a search bar that will help you filter the list.

The second possibility is to find the patient on the “Patients” page, by clicking on the “Patients” button in the menu bar and then clicking on the questionnaire icon in the list in front of the name of the patient who you want to send the questionnaire to. The list displayed will show you all questionnaires for a specific patient.

Please be aware that users can go from the Patient Details page to the questionnaire page easily by clicking on the button in the top right corner of respectively the Patient details page and the Patient questionnaires page.
Printing the letter

Double clicking on a sent questionnaire will open the Questionnaire manager that features tabs that will help users send questionnaires via email, post, in clinic or call the patient. Clicking on “Letter” will allow you to “Print [a] Letter” to send to the patient. Clicking on this button will automatically generate a letter based on the template defined.

8.2 How to customise a template?

By default, epiCentre stores three templates in a defined share folder that can be customised. If the shared folder available to epiCentre is S:/epiCentre, then, the templates will be in the folder: S:/epiCentre/templates/
One template is for the initial letter sent to the patient. That template is called `adult_ePPOC_initial_letter.docx`.

One template is for the last letter sent to the patient. This template is for post discharge follow up questionnaire and is called: `adult_ePPOC_final_letter.docx`.

One template for any other letter: `adult_ePPOC_follow-up.letter.docx`.

These templates are a mix of text, pictures and “MergeFields”. Merge Fields are items that can be dynamically and automatically updated by epiCentre. Below is a list of the merge fields available in epiCentre:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>«PatientFirstName»</td>
<td>First name of the patient</td>
</tr>
<tr>
<td>«PatientLastName»</td>
<td>Last name of the patient</td>
</tr>
<tr>
<td>«PatientStreet»</td>
<td>Street part of the address of the patient</td>
</tr>
<tr>
<td>«PatientSuburb»</td>
<td>Suburb part of the address of the patient</td>
</tr>
<tr>
<td>«PatientStateOrProvince»</td>
<td>State or Province part of the address of the patient</td>
</tr>
<tr>
<td>«PatientPostcode»</td>
<td>Postcode part of the address of the patient</td>
</tr>
<tr>
<td>«ExpirationDate»</td>
<td>The expiration date of the questionnaire as defined by your service</td>
</tr>
<tr>
<td>«PatientQRCode»</td>
<td>The scannable QR Code for your patient to open the questionnaire on a tablet</td>
</tr>
</tbody>
</table>

To create the template, it is important that the name of the fields is exactly as displayed in the previous table. Users can copy and paste these into your document or follow the instructions:

1. Click where you want to insert a field.
2. On the Insert tab, in the Text group, click Quick Parts, and then click Field.
3. In the Field names list, select a MergeField as a field name.
4. Enter one of the field names available from the previous table as a field name.
Your doctor has referred you to XXX Pain Management.

If you wish to attend our service, please complete and return the enclosed questionnaire. This questionnaire contains questions about you, your pain and how it...
9 Extracting your data

The Data Extraction wizard will assist the user in the export of the outcomes stored in database. The extract files consist in 5 standard and 2 optional Coma Separated Files (CSV):

- A patient file will list all patients that have not been deleted and are in scope.
- An episode file will list all episodes which patient they belong to have not been deleted and are in scope.
- A pathway file will list all pathways which patient they belong to have not been deleted and are in scope.
- A service event file lists all service events which patient they belong to have not been deleted and are in scope.
- A questionnaire file lists all questionnaires which belong to a patient that have not been deleted and are in scope.
- A medication file lists all the medication attached to the questionnaires extracted. The medication file is optional.
- A patient note file that lists all the notes written by clinicians and attached to the extracted patients. The patient note file is optional.

An element is extracted if it belongs to an episode that has at least one service event or questionnaire requested during the scope range.

A header on top of each file will help the user match each column with the data item in the dataset.

A new “Extract” button has been added to the header at the top of the application, accessible from anywhere in the application, it will open the new Extract data wizard.
The wizard displayed above will require the user to fill the following fields:

- **The Folder**: These files need to be stored on a hard drive. The wizard will help you specify the location you want these files to be stored in by letting you enter the path or selecting it clicking on “Browse”.

- **The Prefix**: Most users plan on having multiple set of data. Defining a prefix will help you differentiate them by adding a particular prefix to each set. The template for the name will be the following: `prefix_dataitem.csv`. Where the prefix is the string of characters specified in this text box and “data item” is the name of the Level in the standard dataset (e.g. Patient, Episode, Pathway, Service Event or Questionnaire.)

- **The scope**: It is also possible to specify the scope of the extract. Having the Scope checkbox ticked will let you precise the date range for your extraction.

- **Standard/custom extracts**: Standard extracts are the extracts sent to the ePPOC team they are meant to be de identified and as compact as possible. For your projects you may want to include identifiers or fields not included in the ePPOC dataset such as the medication list. In order to do so, you will have to select custom extract and select the specific items you would like to add to the standard extract.
10 Feedback

We are always working to make your experience as successful as possible with epiCentre. If you have any feedback or specific requirement for the next version, submit it by email at the following address:

eppoc@uow.edu.au