

Protocol Consents in EpiSoft

EpiSoft now supports up to 3 different types of Consent linked to a Protocol

These are:

1. A simple acknowledgement by the doctor that the patient has consented to the treatment
2. A signed patient consent to treatment as you typically get signed by the Dr and the patient and upload to the Patient Documents - this can now be linked to protocol cycles for better compliance / tracking to specific treatments
3. A third party approval with an expiry such as from BloodSTAR

Initial Setup

Based on your organisation policy, you need to determine if all protocols should have a simple Acknowledgement statement signed by the clinician (and only some protocols require a Consent signed by the patient) OR all protocols require a Consent signed by the patient.

This rule then needs to be set in the Organisation Preference. You can change this rule if your policy changes at some stage but as a general rule, these flags on Org Prefs page will be set once and not be changed.

Protocol Module Preferences

- Diagnosis and allergies mandatory on first time use
- Two Signatures when publish
- Cancer staging mandatory on save of new protocol. TNM score visible but not mandatory to save new protocol
- Unsigned Phone/Standing Order alert on login
- Auto Complete Past Protocol Cycles
- One Prescriber's signature on protocols
- Cycle must be signed before Drug Administration chart is activated
- Unsigned Phone/Standing Order - Allow Sign All

Default BSA Calculation Method: Mosteller (selected) / Dubois

Protocol consents - default protocol publish records to include online acknowledgement by Doctor **Tick boxes to apply a blanket organisation wide policy across all protocols**

Protocol consents - default protocol publish records to require a linked signed patient consent document Ensure you have set any expiry rules for your documents of type consent in the Track Doc. Categories page.

Pharmacy and eScript Preferences

- Print option: use Baxter download
- Allow pharmacist to tick 'Dispensed' before ticking 'Received' on Manage Orders (This preference impacts drugs going to orphan (unused) drugs. Click here for more info)
- Retain visibility of ceased (struck through) drugs on Patient Pharmacy List independent of order status (and deferred on Manage Orders); retain signatures on Patient Pharmacy List
- Show print buttons on Patient Pharmacy List to allow user to 'Print all selected medications'
- Include fourth checkbox column ('Finalise') on Patient Pharmacy List

Before finalising your organisation setup, if Acknowledgement is one of these preferences, you must create the Acknowledgement statement in the associated popup:

Enable no fixed address to disable other address fields

Protocol Module Preferences

Diagnosis and allergies mandatory on first time use

Two Signatures when publish

Cancer staging mandatory on save of new protocol. TNM score visible but not mandatory to save new protocol

Unsigned Phone/Standing Order alert on login

Default BSA Calculation Method: Mosteller (selected) / Dubois

Protocol consents - default protocol publish records to include online acknowledgement by Doctor **tick acknowledgement and you will get a green View button to enter your required Ack text**

Protocol consents - default protocol publish records to require a linked signed patient consent document Ensure you have set any expiry rules for your documents of type consent in the Track Doc. Categories page.

Pharmacy and eScript Preferences

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Pharmacy Suppliers

- + Add a supplier
- Supplier Name: HPS Pharmacies
- Supplier Fax Number: 0389356688
- Primary?:
- Baxter: 02 8888 6888

Background Process runs to update your records

Once organisation preferences is saved with changes to one or both of these two tick boxes, will then trigger a background process which might take a few minutes to run that will:

1. Update all your Protocol Publish records to match what you have ticked on the Organisation

Preferences

Publish Protocol

11/07/2024

Accessible by: Users in my organisation only

Approved by: [User Icon]

Co-approved by: [User Icon]

Protocol Publish Documents:

+ Add new record

Document

No records to display.

Page 1 of 1, Items 0 to 0 of 0.

Organization last reviewed date: [Date]

Organization next review date: [Date]

Associated Visit Reasons:

- Cancer (unknown primary)
- Haemorrhage
- Lung cancer
- Colorectal cancer
- IBD unspecified

Diagnosis and allergies mandatory on first time use

Cancer Staging Mandatory On First Time Use

Custom buttons display: [Info]

Clinical Summary

Protocol consents:

- Requires clinician acknowledgement (unless there is a signed consent)
- Requires signed consent
- Requires third party approval (e.g. Blood Bank for IVIG)

Protocol Reporting Groups:

- Biologicals
- Chemotherapy
- Hormone therapy
- Monoclonal Antibodies
- Procedure
- Targeted therapy
- Blood and Blood Products
- Clinical trial
- Immunotherapy
- IVig

Order:

- Lymphoma
- Neurological cancer
- Sarcoma (bone & soft tissue)
- Melanoma
- Ovarian cancer
- Upper GI cancer
- Multiple myeloma
- Pancreatic cancer
- New epiloft Look and Feel
- Myelodysplastic syndrome
- Prostate cancer
- Porphyria

These flags on the publish record will auto tick for all protocols in your org if you modify either of the top 2 tickboxes in Organisation Preferences

If you set via Organisation Preferences, the user last modified on the Publish Record will be EpiSoft Scheduler

Last modified by: EpiSoft Scheduler on 25/06/2024 9:23 AM

2. Update all patient protocol cycles with a cycle start date of today or in the future to require the consent type you have set

3. You will start to see red icons on the appointment worklist and red buttons at the top of edit protocol and on the drug chart as patients may have signed consents in their documents but none of them have yet been linked

Appointment List Home

Today Yesterday Tomorrow Next 7 Days Last 7 Days Any Date Date Range

MRN/UR#: [Input] EpiSoft ID: [Input] Surname: [Input] Given Name: [Input] Date of Birth: [Input]

Appointment Status: All Country: Australia Site: Cabramatta, Hornsby, N Appointment Type: All Appointment Clinician: 4 items checked

Primary Clinician: All

Appointments List Filter: Last 7 Days at HOPE Cancer

If turning on a protocol publish rule via Organisation Preferences for all protocols, be aware that all icons for consents will be red initially

Print Selected Appointments	View cancelled appointments	Hide Completed/Discharged		Epi ID	Name	DOB	MRN/UR#	Phone	Date	Time	Attended	Reason	Type	Appt Clinician	Resource
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9656	APE, Axel	1/11/1945	9656	0414911927	Thu, 4/07/2024	9:00 AM - 1:00 PM	<input checked="" type="checkbox"/>	Urogenital cancer (Cis + Etop C1 D2)	Admission (chemotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9657	Impeachy, Darling	13/08/1965	9657	0414911927	Thu, 4/07/2024	9:00 AM - 3:00 PM	<input checked="" type="checkbox"/>	Immune disorder (Gamunex 10% C2 D1)	Admission (immunotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9660	SPEE, Actinella	14/05/1956	9660	0414911927	Thu, 4/07/2024	9:00 AM - 1:00 PM	<input checked="" type="checkbox"/>	Urogenital cancer (Cis + Etop C1 D2)	Admission (chemotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9681	TENCIN, Catherine	23/11/1985	9681	0409676651	Thu, 4/07/2024	9:00 AM - 3:00 PM	<input checked="" type="checkbox"/>	Immune disorder (Gamunex 10% C4 D1)	Admission (immunotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9657	Impeachy, Darling	13/08/1965	9657	0409676651	Fri, 5/07/2024	9:00 AM - 3:00 PM	<input checked="" type="checkbox"/>	Immune disorder (Gamunex 10% C3 D1)	Admission (immunotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9678	Teardrop, Bluey	16/04/1991	30003	0409676651	Fri, 5/07/2024	9:00 AM - 10:00 AM	<input checked="" type="checkbox"/>	Urogenital cancer (ddMVAC C1 D4)	Admission (blood transfusion)	O'Nicol, Nathan	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9679	Steepe, Specie	4/03/1947	9679	0409676651	Fri, 5/07/2024	9:00 AM - 10:00 AM	<input checked="" type="checkbox"/>	Urogenital cancer (ddMVAC C1 D4)	Admission (blood transfusion)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9553	Scanley, Dorrit	19/02/1968	9553	0409676651	Sun, 7/07/2024	9:00 AM - 1:00 PM	<input checked="" type="checkbox"/>	Multiple myeloma (Carfilzomib/Dex C1 D1)	Admission (chemotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9557	Edwards, Jacinta	15/09/1981	258946	0414911927	Sun, 7/07/2024	9:00 AM - 5:20 PM	<input checked="" type="checkbox"/>	Leukaemia (Hyper CVAD/Imatinib PIB C1 D1)	Admission (chemotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9553	Scanley, Dorrit	19/02/1968	9553	0409676651	Mon, 8/07/2024	9:00 AM - 1:00 PM	<input checked="" type="checkbox"/>	Multiple myeloma (Carfilzomib/Dex C1 D2)	Admission (chemotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9557	Edwards, Jacinta	15/09/1981	258946	0414911927	Mon, 8/07/2024	9:00 AM - 5:20 PM	<input checked="" type="checkbox"/>	Leukaemia (Hyper CVAD/Imatinib PIB C1 D2)	Admission (chemotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9926	Lucky, Joyful	15/11/1970	9926	0414911927	Mon, 8/07/2024	9:00 AM - 12:00 PM	<input checked="" type="checkbox"/>	Lymphoma (ABVD C2 D1)	Admission (chemotherapy)	O'Nicol, Nathan	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9957	Edwards, Jacinta	15/09/1981	258946	0414911927	Tue, 9/07/2024	9:00 AM - 5:20 PM	<input checked="" type="checkbox"/>	Leukaemia (Hyper CVAD/Imatinib PIB C1 D3)	Admission (chemotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9668	Morrison, Patricia Anne	18/03/1970	9668	0409676651	Tue, 9/07/2024	9:00 AM - 1:00 PM	<input checked="" type="checkbox"/>	Lung Cancer (Cis+Alimta C1 C1D1)	Admission (chemotherapy)	O'Neill, Chris	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9786	Ibrahim, Alra	12/08/1985	9786	0409676651	Tue, 9/07/2024	9:00 AM - 5:20 PM	<input checked="" type="checkbox"/>	Leukaemia (Hyper CVAD/Imatinib PIB C2 D1)	Admission (chemotherapy)	O'Nicol, Nathan	Chair 1
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	9787	Ibrahim, Nuri	30/04/1983	9787	0409676651	Tue, 9/07/2024	9:00 AM - 5:20 PM	<input checked="" type="checkbox"/>	Leukaemia (Hyper CVAD/Imatinib PIB C2 D1)	Admission (chemotherapy)	O'Nicol, Nathan	Chair 1

4. Any new protocols you create and publish will be ticked by default to match your organisation policy.

If you want to set protocol specific rules in addition to your organisation preference, you can set these flags in the protocol publish records. For example, for your IVIG protocols, you will likely want to check the third party approval checkbox to track your BloodSTAR approvals. If you use the Acknowledgement function as a rule, you may tick some high risk treatments as requiring a signed patient consent.

Publish Protocol

Approved for publication: Approved by O'Neil, Chris (Oncologist - EpiSoft Only - HCC) 23/06/2024 10:53 AM
Co-approved by O'Nicolò, Nathan (Oncologist - EpiSoft Only - HCC) 23/06/2024 10:53 AM

Protocol Publish Document(s)
+ Add new record
Document: No records to display
Page 1 of 1, Items 0 to 0 of 0

Organisation last reviewed date: [] Organisation next review date: []

Associated Visit Reason

Diagnosis and allergies mandatory on first time use
Cancer Staging Mandatory On First Time Use
Custom buttons display []

Clinical Summary
Protocol consents

Protocol Reporting Groups

Tick third party approval option on protocols where treatment requires BloodSTAR approval

Anaemia Headspace Multiple myeloma Sarcoma (bone & soft tissue) Inflammatory arthropathies
 Multiple Sclerosis Anaphylaxis IBD unspecified Myelodysplastic syndrome Upper GI cancer Hypercalcaemia of malignancy
 Bone disorder breast cancer Immune disorder Neurological disease Urogenital cancer Polycythaemia
 Low iron cancer (unknown primary) Indeterminate Colitis Blood and marrow transplant Porphyria
 Crohns Disease colorectal cancer Leukaemia ovarian cancer Ankylosing spondylitis Thyroid disorders
 Ulcerative Colitis gynaecological cancer Lung Cancer Pancreatic cancer Unknown Multiple Oncology indicators
 Rheumatoid arthritis Haemochromatosis Lymphoma Prostate cancer Liver cancer Not Coded
 Osteoporosis Head & Neck cancer Melanoma

Allergies & Conditions Test Results Management Plan Medications Cancer visit record Hepatitis B Management Plan

Cancer Summary
 Requires clinician acknowledgement (unless there is a signed consent)
 Requires signed consent
 Requires third party approval (e.g. Blood Bank for iHG)

Biologicals Chemotherapy Hormone therapy Monoclonal Antibodies Procedure Targeted therapy
 Blood and Blood Products Clinical trial Immunotherapy iHG

Last modified by: O'Neil, Chris on 23/06/2024 10:53 AM

When you make a change to a publish record to the consent ticks, part 2 (and 3) of the background process will run to reset the consent rules for all the patient protocols that match that publish records. It will never remove existing linked consents or data but will set the rules for new ones.

Consent document tracking setup - the final setup is to check if any patient signed consent document categories are setup as you require them in the Document Category Tracking Administration page (called Track Doc Categories in the System Administration menu). Here you can set the rules for which document categories you have access to should be tracked to have a System Calculated Expiry or a User Entered Expiry. If Is Consent is ticked, this document will be able to be linked to a patient protocol as a consent to treatment. If you require additional categories for your consents other than the ones already available please contact help@episoft.com.au

Document Category Tracking Administration

Document Category [] Add

Please add your preferred document category and its tracking details - select Save below after your changes finalised. More detail on expiry tracking and documents of type consent here: []

Document Category	Track Expiry	Expiry Months	User Entered Expiry	Is Consent	
Unspecified Document Category	<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	[X]
Patient support materials	<input checked="" type="checkbox"/>	6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[X]
Clinical reference materials	<input checked="" type="checkbox"/>	1	<input type="checkbox"/>	<input type="checkbox"/>	[X]
Training guides	<input checked="" type="checkbox"/>	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[X]
Consent to Medical & Surgical Treatment	<input checked="" type="checkbox"/>	24	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[X]
Diagnostic imaging results	<input checked="" type="checkbox"/>	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[X]
Power Of Attorney	<input checked="" type="checkbox"/>	12	<input type="checkbox"/>	<input type="checkbox"/>	[X]
Referral Letter	<input checked="" type="checkbox"/>	12	<input checked="" type="checkbox"/>	<input type="checkbox"/>	[X]
Advance Care Directive	<input checked="" type="checkbox"/>	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[X]
Consent Minus Tracking - HCC	<input checked="" type="checkbox"/>	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	[X]

Save

Ensure your consents requiring patient signature are setup in this page with Is Consent ticked. Tracking expiry is optional - leave unticked if you wish the consent to be open-ended (have no expiry) otherwise tick and set expiry months for autocalculation of an expiry date or user entered expiry

This is also where you can set up expiry date tracking for patient signed consents. For example, you may want to set no expiry if the consent will be valid for as long as the treatment or else you may require a new consent to be signed every twelve months.

You do not need to track BloodSTAR document expiries through this module as third party approvals are tracked a different way so this module is for tracking treatment consents (signed by the patient and the doctor).

This completes the setup for your Protocol Consents module.

Buttons on Edit Protocol and Drug Chart

Once set up you will also start to see red buttons in the top right of Edit Protocol and Drug Chart signifying that a consent is required but is not complete/linked. This button is not visible when in New Protocol mode (only when protocol page is in Edit mode). This button can be used to enter the consent data or link an existing consent to a protocol.

A green button on these pages signifies the consent data for that cycle is valid / complete.

Protocol ID: 3849 v.4.0
Cycle Type: Cycle 1 (and further cycles)
Number of this cycle type: 2
Cycle # 1
Frequency: 21 Days
Starting At: 4/05/2024
View Consents/Approvals

Green button on Edit Protocol and drug chart signifies no action (red signifies missing or expired consents - click button to action)

Protocol Alerts	Show all	Reply	Alert for	Alert from	Alert Details	Alert Date	Reply back	Acknowledge	Acknowledged by
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Summary Clinical Information

Assessment	Date:	4/05/2024	Weight:	Height:	Today's Weight:	Baseline Weight:
Pathology	FBC:	Hb:	WCC:	Neut:	Platelets:	
	Biochem:	Sodium:	Potassium:	Magnesium:	TNM Score:	Cancer Stage:
	Kidney function:	eGFR:	mGFR:	Se Creatinine:		
Calculations of kidney function	BSA adjusted eGFR:	Baseline GFR:	Creatinine clearance (CC-G):	To use the preferred kidney function method in the Calvert equation, add the dose units for Carboplatin		
Allergies-ADRs	Nil Known					

Linking Consents to Patient Protocols

Consent documents

You can link a Consent to a protocol if the protocol publish record has been ticked as requiring a consent OR ticked as requiring an acknowledgement (on the basis that if you have a signed consent, an acknowledgement is not required). To do this, click the Manage Consents/Approvals button on the top of Edit Protocol.

There will be a dropdown list with all the non expired consents that you have uploaded to Patient Documents. Documents will only appear in this list if the expiry date is later than the cycle start date and the document category has been set to tracking in Track Doc Categories page.

The expiry date matching rules have been designed on the basis that if the patient consent is valid at the start of the cycle, the consent will remain valid to end of that same cycle (but will not be valid for future cycles).

Manage Consent/Approval

Rigby, Eleanor (New Valid Consent Uploaded) DOB 1/01/2000 (24 years) UR# 9910 ID 9910 (M)
Head and Neck squamous cell recurrent or metastatic pembrolizumab - Cycle 1 (and further cycles)

Clinician Acknowledgement

I acknowledge that patient has consented to this treatment
Acknowledged by O'Neill, Chris on 4/05/2024 - Cycle 1 (and further cycles)

Remove Acknowledgement

Patient signed consent (select from list or upload)

A patient signed consent is mandatory for this protocol

Link/Update consent

Cannot find linked consent in

Upload new consent

04/05/2024 - Consent to Medical & Surgical Treatment (Eleanor's Valid new consent) | Expiry: 04/05/2026

04/05/2024 - Consent to Medical & Surgical Treatment (Eleanor) | Expiry: 04/05/2026

Save Save & Close Close

If the consent document has not previously been uploaded to the Patient Documents page, then

you can choose to upload a new consent document at this time via the Manage Consents/Approvals page. See below.



Welcome Nathan O'Ncolo Epi

Manage Consent/Approval

Rigby, Eleanor (New Valid Consent Uploaded) DOB 1/01/2000 (24 years) UR# 9910 ID 9910 (M)
Head and Neck squamous cell recurrent or metastatic pembrolizumab - Cycle 1 (and further cycles)

Clinician Acknowledgement

I acknowledge that patient has consented to this treatment.

Acknowledged by O'Neill, Chris on 4/05/2024 - Cycle 1 (and further cycles)

Click to upload a new consent if it is not already in the patient documents list

Patient signed consent (select from list or upload)

A patient signed consent is mandatory for this protocol

Link/Update consent

Cannot find linked consent in dropdown list? Upload new consent by clicking the button below

Upload new consent

Click upload new consent opens fields similar to patient document upload page - expiry date will calculate when you select a document category - will meet the rules set in your Track Doc Categories page (expiry months)

This field will be editable if you have decided you prefer a user entered expiry.

The expiry date field will not appear if you have decided to set your consent with Track Expiry unticked

Document Select

Document Date 18/05/2024

Title

Category Consent to Medical & Surgical Treatment

Expiry Date 18/05/2026

Once uploaded as new or linked from existing patient documents list, the page will display the consent metadata. You can view / download the consent document or if you have made a mistake, you can remove the consent.

Manage Consent/Approval

Manage Consent/Approval saved

Rigby, Eleanor (New Valid Consent Uploaded) DOB 1/01/2000 (24 years) UR# 9910 ID 9910 (M)
Head and Neck squamous cell recurrent or metastatic pembrolizumab - Cycle 1 (and further cycles)

Clinician Acknowledgement

I acknowledge that patient has consented to this treatment.

Acknowledged by O'Neill, Chris on 4/05/2024 - Cycle 1 (and further cycles)

Patient signed consent (select from list or upload)

A patient signed consent is mandatory for this protocol

View/Download Consent

Remove Consent

Current consent details: 4/05/2024 - Consent to Medical & Surgical Treatment (Eleanor's Valid new consent) - Expiry: 4/05/2026

Link/Update consent

Cannot find linked consent in dropdown list? Upload new consent by clicking the button below

Upload new consent

If a consent is added it will show summary details here...

You will also then see a View/Download consent button so you can view the document

And Remove Consent if you made a mistake

Third party approvals

Adding third party approval details to a Protocol - if the protocol publish record has been ticked as requiring a third party approval, when you open the Manage Consents/Approvals from the top of the Edit Protocol page, you will see the approval section to which you can add a short description and an expiry date.

Manage Consent/Approval

Teardrop, Bluey (Clin Ack On Drug Admin 2) **DOB** 16/04/1991 (33 years) **UR#** 30003 **ID** 9678 (F)
 Primary Clinician: Dr Nathan O'Nicol
 Acute lymphoblastic leukaemia Ph+ hyper CVAD part B and imatinib with approval only ticked - Cycle 2 and 4

Approvals

Approval details

Expiry Date

Save Save & Close Close

If the protocol requires third party approval these fields are mandatory.

It would be more common for the protocol to require not just a third party approval but a consent as well in which case the Manage Consent/Approval page will appear as below.

Manage Consent/Approval

Teardrop, Bluey (Clin Ack On Drug Admin 2) **DOB** 16/04/1991 (33 years) **UR#** 30003 **ID** 9678 (F)
 Primary Clinician: Dr Nathan O'Nicol
 Colorectal Metastatic Ralitrexed with signed consent and approval ticked - Cycle 1 (and further cycles)

Patient signed consent (select from list or upload)

A patient signed consent is mandatory

Link/Update consent

Cannot find linked consent in the drop down list? Upload new consent by clicking the button below

Upload new consent

Approvals

Approval details

Expiry Date

Save Save & Close Close

Save Save & Close Close

If different people need to add approval details and link consent at different times they can do so.

The save buttons for each section are separate and have different validation rules

Clinician acknowledgements

Adding Acknowledgements to Patient Protocols - if the protocol publish record has been ticked as requiring an acknowledgement, when you add a new protocol to a patient, the acknowledgement text will be on the page and it will be mandatory to check if you have the permission to acknowledge. If you are adding protocol on behalf of a clinician who must later acknowledge, you will not be prompted for this and after saving the protocol, the Manage Consents/Approvals from the top of the Edit Protocol page, you will see the approval section to which you can add a short description and an expiry date.

New Protocol - Bladder/Urothelial adjuvant ddMVAC (dose dense methotrexate vinBLASTine DOXorubicin cisplatin) with clin ack only

Hairstead, Lucinda **DOB** 5/08/1962 (61 years) **UR#** 13323 **ID** 13323 (F)
 Primary Clinician: Dr Chris O'Neill

Visit Date: 23/05/2024 **Save Close**
 Form not saved - one or more required fields missing or invalid.

Principal diagnosis

Condition **Principal Diagnosis:**

Clinician Acknowledgement

I acknowledge that patient has consented to this treatment.

Acknowledged **Please acknowledge that you have obtained patient's consent to treatment**

Clinical Assessment

Current weight (dosing weight) kg copy from previous visit Height cm Baseline weight: kg Baseline weight date:

BSA m² Calculated using the Mosteller Dubois formula Mosteller Dubois Cap BSA

Sites

View Options

Day	Appointment	Date	Clinician	Location
Day 1	Appointment	Thu 11/07/2024	O'Nicol, Nathan (Oncologist - EpiSoft Only - H...)	Cabramatta
Day 1	Medication	Thu 11/07/2024	O'Nicol, Nathan (Oncologist - EpiSoft Only - H...)	
Day 2	Appointment	Fri 12/07/2024	O'Nicol, Nathan (Oncologist - EpiSoft Only - H...)	Cabramatta

Medication	Prescribed Dose	Actual Dose	Volume/Amount	Duration/Frequency	Dose Rad	Route	Instructions
Methotrexate 50mg per 2mL injection	30 mg/m ²	54.3 mg	in mL	3 Minutes	%	Intravenous	IV bolus

If you have permission to ACK a protocol and you try to save a new protocol without this, you will be prompted to acknowledge before you can save

After acknowledging you and other staff can see the details in the Manage Consents/Approvals page

Manage Consent/Approval

Rigby, Eleanor (New Valid Consent Uploaded) **DOB** 1/01/2000 (24 years) **UR#** 9910 ID 9910 (M)
 Bladder/Urothelial adjuvant dDMVAC (dose dense methotrexate vinBLASTine DOXOrubicin cSPlatin) with clin ack only - Cycles 1 to 4

Clinician Acknowledgement

I acknowledge that patient has consented to this treatment.
 Acknowledged by O'Nicol, Nathan on 11/07/2024 - Cycles 1 to 4

Acknowledgement mandatory unless signed consent attached

Patient signed consent (select from list or upload)

Signed consent is optional for this protocol

Link/Update consent

Cannot find linked consent in the drop down list? Upload new consent by clicking the button below

Details of who / when acknowledged in the Manage Consents/ Approvals page

Flags / Icons to track status

The appointment status and protocol cycles list both show the Consent Icon that displays as green (consent section complete), orange (consent section complete but due for review or update expiring consent within 22 days of the cycle start date), red - consent is expired or missing. The tooltip shows the details.

Protocol Cycles (Episteme) Teardrop, Bluey (Clin Ack On Drug Admin 2) **DOB** 16/04/1991 (33 years) **UR#** 30003 ID 9678 (F) Visit Date: 2/07/2024 (Dr Nathan O'Nicol)

Active Protocol Cycles

Version	Protocol	Protocol Cycle	Protocol Cycle #	Frequency	Start Date	End Date	
1661 v 4.1	Bladder/Urothelial adjuvant dDMVAC (dose dense methotrexate vinBLASTine DOXOrubicin cSPlatin) with clin ack only	Cycles 1 to 4	1	14 Days	2/07/2024	6/07/2024	
000906 v 2.2	Colorectal Metastatic Raltitrevir with signed consent and approval ticked	Cycle 1 (and further cycles)	1	21 Days	11/07/2024	13/07/2024	
1336 v 4.2	Acute lymphoblastic leukaemia Piv hyper CVAD part B and imatinib with approval only ticked	Cycle 2 and 4	1	21 Days	11/07/2024	18/07/2024	
1336 v 4.2	Acute lymphoblastic leukaemia Piv hyper CVAD part B and imatinib with approval only ticked	Cycle 2 and 4	2	21 Days	1/08/2024	8/08/2024	

Completed Protocol Cycles

Version	Protocol	Protocol Cycle	Protocol Cycle #	Start Date	End Date	Completed By	
3730 v 2.0	Endometrial adjuvant carboplatin and paclitaxel	Cycle 1 to 6	1	29/05/2023	1/06/2023	Nurse, Onco (02/07/2024)	
Bev v 1	Bevacicmab (SUPERSEDED)	Cycle 1	1	23/03/2023	23/03/2023	Nurse, Onco (02/07/2024)	
Test all scenarios v 4	Test many scenarios protocol 4	Cycle 1	2	1/09/2021	18/09/2021	O'Neill, Chris (23/03/2023)	
960237 v 2	Non Small Cell Lung Cancer Adjuvant cisplatin and vinORELBine	Cycles 1 to 4	1	15/08/2021	22/09/2021	O'Neill, Chris (23/03/2023)	
Test all scenarios v 4	Test many scenarios protocol 4	Cycle 1	1	3/08/2021	18/08/2021	O'Neill, Chris (23/03/2023)	

Ceased Protocol Cycles (prior to completion)

Version	Protocol	Protocol Cycle	Protocol Cycle #	Start Date	End Date	Ceased Date	Protocol Cease Reason	Ceased Reason Description
No records to display.								

If the patient is on multiple treatments in one day as an inpatient, this as you know groups the appointments on the appointment list. In this case, the icon colour will show the least compliant consent (red trumps orange for example) and the tooltip will show the details of all protocols for that day.

Previous function - Document icon and tracking / expiry - this is still available on the Appointment list but should no longer be required for protocol treatments as there is now a hard link to the protocol and a dedicated icon. If you prefer to continue to use this function instead of the linked consents function, do not go through the setup steps and this icon will continue to work as it did previously.

Copy forward rules

An acknowledgement, consent or approval will copy forward for all future cycles of this protocol including when the cycle type changes. It will not copy if:

1. The future cycle start date is later than the expiry date on the consent (and third party approval will cease copying for the same reason)
2. It is the same protocol but with a different system ID or version number
3. If the protocol publish record rule has changed for example that particular protocol no longer requires a consent

Acknowledgements have no expiry date so will continue to copy forward for future cycles of that protocol for that patient regardless of the cycle start date.

Moving protocol date from past to future

If you modify a protocol publish record consent tick box (or organisation preference consent preference), the abovementioned Background Process runs. However it only runs on cycles that have start dates now or in the future. You may have active cycles for a particular patient that are in the past because, for example, their treatment is on hold for some reason. If this happens and you need to move a past protocol to the future, as you move it forward, it will pick up the rule from the protocol publish record and apply it to that protocol.