ONCOLOGY PATIENT INFORMATION SYSTEM (OPIS) CLINICAL TRIAL ORDER ENTRY

*Please refer to the OPIS eManual for more detailed instructions.

LOGGING ON

1. **Double click** on the **OPIS Icon.**
2. Enter your **ID** and **signature.**
3. Click the "**OK**" button to proceed.

CHANGING YOUR SIGNATURE (PASSWORD)

Change your default password the first time you login to OPIS to something secure and private. It is **highly recommended** that you change your password **every 90 days**.

1. Select the **User Options** menu and then **Signature/Pin.**
2. Type your **Old Signature** (provided by the Help Desk).
3. Type your **New Signature.**
4. **Verify** (retype) your **New Signature.**
5. Click the **Save** button on the toolbar.

Signatures must be 8-10 characters long and should contain 3 of these 4 characteristics:

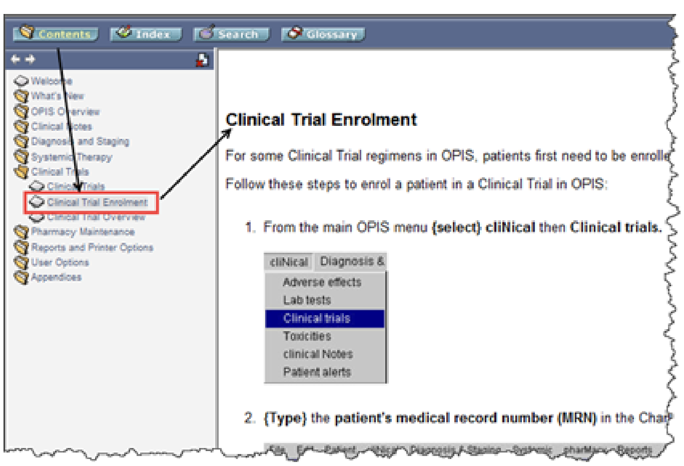
- Uppercase letters (A - Z)
- Lowercase letters (a - z)
- Numeric characters (0 - 9)
- Non-Alpha numeric characters (!,#,$, etc.)

HELP

OPIS eManual: Provides step-by-step assistance to OPIS users on OPIS functionality.

To access this manual, **click** on the **Internet Explorer** icon on any UHN computer to access the Corporate Intranet, select **Education > DIGITAL Education > eManuals > OPIS eManual**.

Once in the eManual, **select** a topic from the **Table of Contents** *or* **click** on **Index** to search topics alphabetically or by keyword.



Technical Issues: Call **H-E-L-P** (4357) from any phone at UHN or (416) 340-4800x4357. The Customer Care Centre is available 24 hours a day, 7 days a week.

PRINTER OPTIONS / PRINTING

To setup your printer at your local workstation (if applicable):

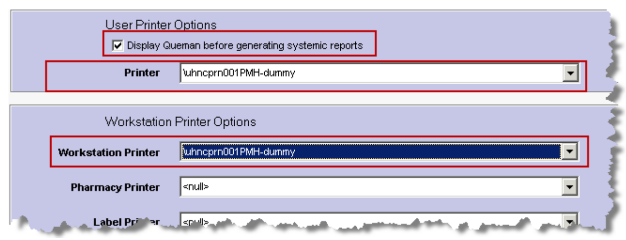
From the menu select **User Options** > **Printer Options**

Workstation Printer:

- This is the printer this particular PC is printing to (not user specific).
- Select the printer closest to you, using the Floor_Room # naming convention.
- If the printer you want to setup is not on the list, call the Customer Care Centre at extension 4357 to setup a new print queue.

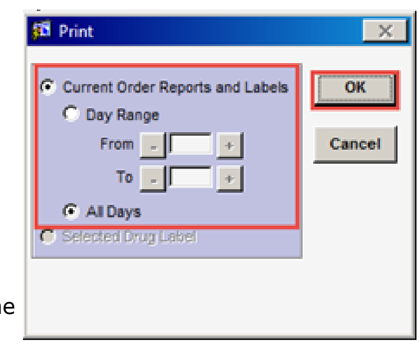
Printer:
setup the same as the Workstation Printer.

The remaining printers setup: leave as <NULL>.



The **Queman** can be turned on/off by using the checkmark option and clicking the **Save** button  on the toolbar.

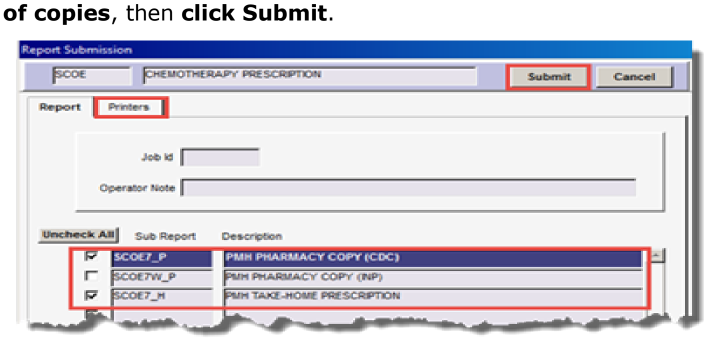
To print a regimen order, make sure the **Queman is turned on**, locate and **open the order** you want to print, **click** the **Print** icon on the toolbar.



In the **Print window**, select **All Days** and click **OK** to ensure you print all days of the Take Home Scripts.

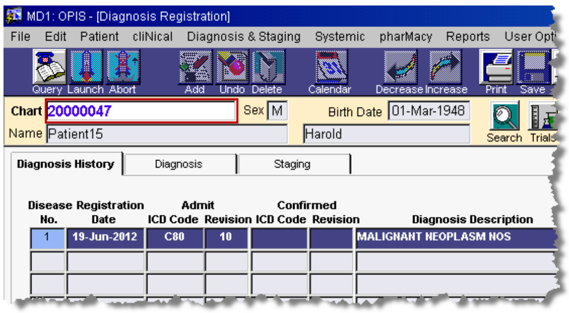
Clicking the **Cancel** button will cancel all reports including the Take Home Scripts. **Note:** please see the **OPIS eManual** for a more detailed description of using the Print window.

In the Reports Submission window, **click** on the **PMH Pharmacy Copy (CDC)** report, **click** on the **Printer** tab, **enter** the **number of copies**, then **click Submit**.



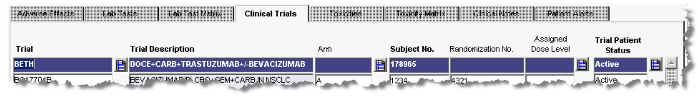
PATIENT SEARCH

1. Open the specific menu within OPIS that you wish to work in (e.g. Diagnosis, Chemo Orders, etc.).
2. **Type** the patient's **MRN** number in the **Chart** field.
3. **Press** the **Enter** key (Patient demographic information and patient details for that area will populate).



Alternatively, use the **Search icon to search for the patient by Name.*

ENROLLING A PATIENT IN A CLINICAL TRIAL



For newer Clinical Trial regimens (built in OPIS after December 2008), the patient must be registered prior to entering a Clinical Trial regimen order.

1. **Select Clinical Information > Clinical Trial.**
2. **Search** for the **patient** (see PATIENT SEARCH).
3. **Click** on the **Trial** LOV button next to the Trial column.
4. **Click** on the **Trial** the patient is to be enrolled in within the list to select it and then **click OK.**
5. **Click** in the **Subject** field and type the patient's subject number.
6. **Click** on the **Status** LOV button next to the Status column and select the **Active** status and then **click OK**.
7. **Complete** any of the additional non-mandatory fields as needed.
8. **Click** the **Save** button on the toolbar. *This Study information will display on the Chemo Order tab of the regimen orders.*

ENTERING A CLINICAL NOTE

Clinical Notes are used by clinicians to communicate information about the patient. Notes are "write-protected" and cannot be deleted. A note can be deactivated if it is no longer relevant or was entered on the wrong patient.

In OPIS, Clinical Notes should be used to document study information such as baseline weight, other study information as specified in the Regimen Notes, proceed notes, etc. **Note:** Only Clinical Trial Coordinators with RN designation should enter proceed" notes for trials.

1. **Select Clinical Information >Clinical Notes.**
2. **Search** for the **patient**.
3. **Click** in a **blank** row ***or*** **click** on the **Add** button on the Toolbar.
4. **Click** on the **Full Note Text** button to open a larger window in which to type.
5. **Type** the note information using the format adopted at PMH:
   Protocol Name
   Note details
   Name, Designation, & Contact Info
6. **Select** a **remind** option for **Order Entry** and **Medication Admin**. These settings control whether the note will pop up during Order Entry or Documentation of Meds in OPIS.
7. **Click** the **Save** button on the toolbar.

To Deactivate a Note:

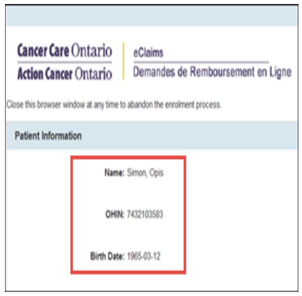
1. **Select Clinical Information >Clinical Notes.**
2. **Search** for the **patient**.
3. **Click** on the **Note** that should be deactivated.
4. **Click** on the **Delete** button on the toolbar.
5. **Click** the **Yes** button on the message to confirm you wish to delete the note.
6. **Click** the **OK** button on the message confirming the record has been flagged as deleted.
7. **Click** the **Save** button on the toolbar.

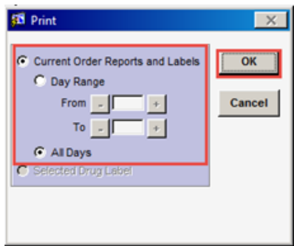
The note text will appear in gray to indicate that it has been deactivated but it will still be visible (similar to paper documentation that has been stroked out and initialed).

ENTERING CLINICAL TRIAL REGIMEN ORDERS

1. Ensure current Height and Weight has been updated in EPR.
2. **Search** for the patient and ensure a **Diagnosis** has been entered in OPIS for the patient by the Principal Investigator or Co-Investigator.
3. For newer Clinical Trials (built after December 2008), ensure the patient is enrolled in the study (see **Enrolling a Patient in a Clinical Trial**).
4. **Select Systemic Therapy > Chemo Order History.**
5. Review outstanding regimen orders for the patient from the **Order History** tab. **Select** the **order** in Order History that you want to base the next order on (most recent orders appear at the top of the list). Click the **View** button. ***Note:*** *For patients without existing orders, you can click directly on the Chemo Order tab to begin a new order.*
6. **Click** on the **Chemo Order** tab.
7. **Click** the **New Order** button New Order.
8. **Complete** all **mandatory** fields (**bolded field labels**) on the **Chemo Order** tab. **Note**: Enter the Principal Investigator or Co-Investigator physician abbreviation in the **PHYS** field using the physician who will be available to sign the order.
9. **Click** the **Generate Order** button. **Note:** you may also be prompted for additional information (Cr value) or prompted to enter your signature for abnormal height/weight/BMI values.
10. **Review** all **Clinical Notes** that pop up, paying close attention to **allergy/adverse reaction** notes.
    For Clinical Trials without enrolmnent (built prior to December 2008), **highlight and copy text (CTRL+C)** from the Clinical Note that contains the study information specified in the Regimen Notes that must be entered into the **Study Patient Info (dummy) drug** in the order.
11. **Review** details of each medication listed on the **Order Details** tab using the **Drug Details** button Drug Detail.
12. **For Clinical Trials without enrollment** (built prior to December 2008), **paste text (CTRL+V)** that you copied from Clinical Note into the **Study Patient Info (dummy) drug** in the order.
13. **Make** any **adjustments** to the medications as needed, enter Kit numbers, etc.

14. **Click** the **Sign Order** button Sign Order once all adjustments are made, enter your **signature** and **click OK.**
15. If the **CCO eClaims** website launches to complete **New Drug Funding Program (NDFP)** eligibility forms, close the website and inform the Principal Investigator or Co-Investigator so that they can complete the CCO eClaims (NDFP) form later.





16. In the **Print window**, select **All Days** and click **OK** to ensure you print all days of the Take Home Scripts.
17. In the **Reports Submission** window, **click** on the **PMH Take-Home Prescription** report and then **click** on the **Printers** tab.
18. Ensure the appropriate **number of copies** needed is set to print (e.g. do you need one copy for the patient to take to his local pharmacy and one copy for medications to be procured from the PMH Research Pharmacy?), and then **click** the **Submit** button. *The Take-Home prescription will print to the local default printer of the computer (the printer that was displayed in the Printers tab).*
19. If multiple copies were printed, **cross out any medications** that will **not be filled** by the different pharmacies and have the Principal Investigator or Co-Investigator sign the Take Home prescriptions.

DOSE ADJUST

Dose Adjust

1. On the **Order Detail** tab of the order, **click** on the **medication** you wish to dose adjust. *Use **CTRL+Click** method to select multiple medications if they can be adjusted in the same way.*
2. **Click** on the **Dose Adjust** button**.**
3. **Select** a **Change Reason** from the **List of Value** options.
4. In the **Change dose as follows** section, **select** whether the change is **permanent** (applies to repeat orders) ***or*** is **temporary** (does not apply to repeat orders).
5. **Select** an **option** indicating **how the dose should be changed** (e.g. previous ordered dose, use the ideal dose, specific dose value, percentage of current or original dose, etc.).
6. In the **Apply to which drugs** section, **select** an appropriate **option** (e.g. selected drug(s) only, all occurrences of the select drug(s), etc.).
7. **Click** the **Preview** button. **Note:** Changes will not be applied to selected medications that have already been verified by pharmacy. However, if you selected the ***permanent*** change option, you will be asked if you *wish to apply the change to all days the next time you re-order*.
8. If the change appears as you intended, **click** the **Apply** button.
9. Once all adjustments are made to the order, **click** the **Sign Order** button, **enter** your **signature**.
10. In the **Print window**, select **All Days** and click **OK** to ensure you print all days of the Take Home Scripts**.**
11. **Click Submit** in the Report Submission window.

ADD MEDICATIONS

Add

1. On the **Order Detail** tab of the order, **click** on the medication **before or after** in the sequence where you want to add the new medication.
2. **Click** the **Add** button.
3. **Click** on the appropriate **option** to place the order *above or below* the current record and then **click OK**.
4. In the **Current Drug Detail** window, complete all the **mandatory** fields (**bolded field labels**). **Note:** When adding **Take Home** medications change **Patient/Adm. Type** to **Take Home** and ensure all relevant information is entered (e.g. duration, refills & quantity – if applicable, and Pharm Sig. instructions, etc.).
5. **Click** the **Close** button to close the Current Drug Detail window.
6. Once all adjustments are made to the order, click the **Sign Order** button, enter your **signature** and **click OK**.
7. In the **Print window**, select **All Days** and click **OK** to ensure you print all days of the Take Home Scripts**.**
8. **Click Submit** in the Report Submission window.

MOVE/COPY MEDICATIONS

Move **Copy**

1. On the **Order Detail** tab of the order, **click** on the **medication** you wish to **move *or* copy**.
2. **Click** the **Move** button *if moving a medication in the sequence*, or the **Copy** button *if copying a medication within the sequence*.
3. In the **Copy *or* Move** window, **enter** a **number** in the **After record** field indicating which record it should follow in the current sequence.
4. **Click** in the **Treatment Day** field and update the number to the appropriate Treatment Day (e.g. Day 1, 8, 15, etc.).
5. **Click** in the **Treatment Date** field and it will automatically update to match the Treatment Day entered.
6. **Click** the **OK** button.
7. Once all adjustments are made to the order, **click** the **Sign Order** button, **enter** your **signature** and **click OK**.
8. In the **Print window**, select **All Days** and click **OK** to ensure you print all days of the Take Home Scripts.
9. **Click Submit** in the Report Submission window.

DATE ADJUST

Date Adjust

Use the Date Adjust button to reschedule an entire order or specific medication days.

1. **Select Systemic Therapy > Chemo Order History**.
2. **Search** for the **Patient**.
3. **Select** the **order** you wish to reschedule and **click** the **View** button.
4. On the **Order Details** tab, **click** the **Date Adjust** button.
5. **Select** a **Change Reason** from the **List of Value** options.

To Date Adjust the entire order:

6. Follow the steps 1-5 above and then, in the **Apply To** area, **select** the option for **Entire Order**.

7. In the **Set Date To** area, **click** on the **calendar** and **select** the **new date** for the order.
8. **Click** the **Preview** button and then the **Apply** button.
9. **Click** the **Sign Order** button and enter your **signature**.
10. In the **Print window**, select **All Days** and click **OK** to ensure you print all days of the Take Home Scripts**.**
11. **Click Submit** in the Report Submission window.

To Date Adjust specific medication days:

6. Follow the steps 1-5 in Date Adjust and then, in the **Apply To** area, **select** the option for **Day Range**.
7. In the **From** field enter the **initial treatment Day** number of the medications to be rescheduled.
8. In the **To** field enter the **last treatment Day** number of the medications to be rescheduled.
9. In the **Set Date To** area, click on the **calendar** and **select** the **new date** for the **initial treatment Day** (of the days you are rescheduling).
10. **Click** the **Preview** button and then the **Apply** button. **Note:** all days being rescheduled will update following the original intervals between treatment days.
11. **Click** the **Sign Order** button, **enter** your **signature** and **click OK**.
12. In the **Print window**, select **All Days** and click **OK** to ensure you print all days of the Take Home Scripts**.**
13. **Click Submit** in the Report Submission window.

CRCL ADJUST

1. On the **Order Detail** tab of the order, **click** on the **medication** you wish to CRCL adjust.
2. Click the **CrCl** Adjust button.
3. **Enter** the **CR** or **CRCL** value and then **click** the **OK** button. Review the new dose of the medication to confirm it has changed appropriately.
4. Click the **Sign Order** button, enter your **signature** and **click OK**.
5. In the **Print window**, select **All Days** and click **OK** to ensure you print all days of the Take Home Scripts**.**
6. **Click Submit** in the Report Submission window.

MEDICATION ADMIN

The Medication Admin area is used to both review and document administration information in OPIS.

Treatment Search:

1. **Select Systemic Therapy > Medication Admin**.
2. If the treatment search window does not open automatically, **click** on the **Search**  icon on the toolbar.
3. **Enter** Treatment Search parameters to search **by treatment date**, **patient *or* physician** and then **click** the **Find** button. **Note:** You can refine your search using the status filters and sorting options.
4. **Select** the **treatment date/regimen of the appropriate patient** and then **click OK**. The treatment screen will open.

Reviewing MAR documentation:

5. After following the steps 1-4 above to open a treatment, high level details of the treatment appear on the **Treatment** tab (e.g. diagnosis, physician abbreviation, regimen name, comments, height/weight/BSA, etc.)**.**
6. **Click** on the **Details** tab and **review** any **Clinical Notes** that pop up using the arrow keys to navigate through them.

Note: Only **Outpatient** (O) medications that have been administered in the Chemo Day Care and Transfusion Centre are documented in OPIS and will display a **checkmark** once documented.

7. **Click** on **each of these medications** and the corresponding **MAR information appears on the right side** of the screen indicating Admin Start Time, End Time (for Clinical Trial regimens), Pharm Sig. instructions, name of administering RN, etc.
8. **Click** the **Search** icon to search for another treatment, ***or* click** the **Exit** button to leave Medication Admin.

REVIEWING VITAL SIGNS AND ACCESS DEVICE DOCUMENTATION

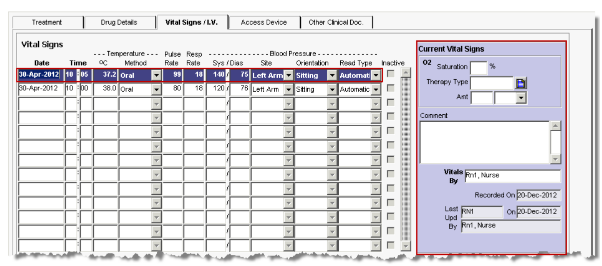
Vital Sign and Access Device documentation is captured in the Medication Admin area in OPIS.

Treatment Search:

1. **Select Systemic Therapy > Medication Admin**.
2. If the treatment search window does not open automatically, **click** on the **Search**  icon on the toolbar.
3. **Enter** Treatment Search parameters to search **by treatment date**, **patient *or* physician** and then **click** the **Find** button. **Note:** You can refine your search using the status filters and sorting options.
4. **Select** the **treatment date/regimen of the appropriate patient** and then **click OK**. The treatment screen will open. *At least **one medication** must be documented as administered in the treatment in order for Vital Signs or Access Devices to be documented for the treatment*.

Reviewing Vital Sign documentation:

5. After following the steps 1-4 in Treatment Search to open a treatment. High level details of the treatment appear on the **Treatment** tab (e.g. diagnosis, physician abbreviation, regimen name,
comments, height/weight/BSA, etc.)**.**
6. **Click** on the **Vital Signs/I.V.** tab and **review** any **Clinical Notes** that pop up using the arrow keys to navigate through them.
7. Documented **Vitals Signs** appear at the top of this tab.



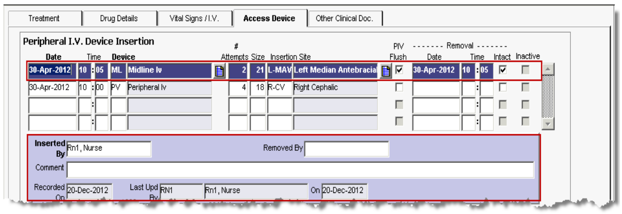
Notes:

- Multiple Vital Signs may be documented for the same treatment.
- I.V. Therapy is not being documented in OPIS at this time.

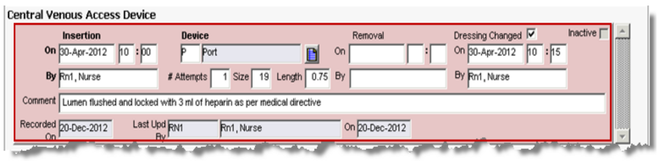
Reviewing Access Device documentation:

5. After following the steps 1-4 in Treatment Search to open a treatment, high level details of the treatment appear on the **Treatment** tab (e.g. diagnosis, physician abbreviation, regimen name, comments, height/weight/BSA, etc.)**.**
6. **Click** on the **Access Device** tab and **review** any **Clinical Notes** that pop up using the arrow keys to navigate through them.

7. Documented **Peripheral** and **Midline IVs** insertion/access appears at the top of this tab.



8. Documented **Central Venous Access Device** access appears in the middle of the screen on the Access Device tab.



Notes:

- The **Alternate Access Device** section and **Other Clinical Doc.** tab are not currently in use at PMH.
- Multiple Peripheral IV and Midline IV insertion/access per treatment may be documented.
- Currently one CVAD access per treatment may be documented.

MED SUMMARY

The Med Summary tabs display regimens/treatments for the patient that have been ordered in OPIS as well as the administration information documented in OPIS.

Select Systemic Therapy > Med Summary.

Regimen Displays a list of regimens that have been ordered for the patient.

Medication Received **Select** a **regimen** on the first tab, then **click** on the **Medication Received** tab to see a summary view of the listed medications' ordered dose, given dose, and intensity (percentage received to date).

Matrix **Select** a **regimen** on the first tab, then **click** on the **Matrix** tab to see the medication information broken into individual treatment days. Given doses will be highlighted in Green.

All Treatments **Click** on the **All Treatments** tab to see a list of all the scheduled treatment dates for the patient. Treatments highlighted in Green have been fully administered and treatments highlighted in Gold have been partially administered.

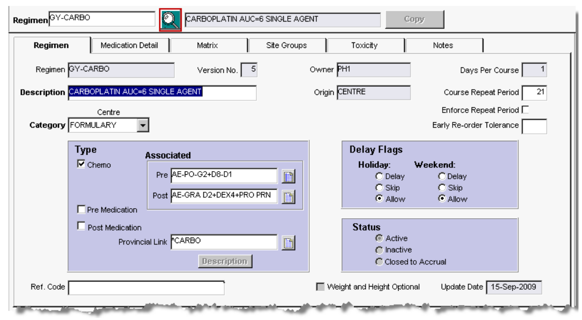
All Drugs **Click** on the **All Drugs** tab to see each scheduled medication and the associated Administration information.

REGIMEN SPECIFICATION

The Regimen Specification area in OPIS is used by the OPIS Pharmacists to build chemotherapy regimen orders in OPIS. Clinical Trial Coordinators and Nurses will have read only access to view the regimens. This allows you to see how the regimen was constructed, independent of specific patient order. When a new Clinical Trial study is created in OPIS, you may be asked to approve it by reviewing it in Regimen Specification before it is made active.

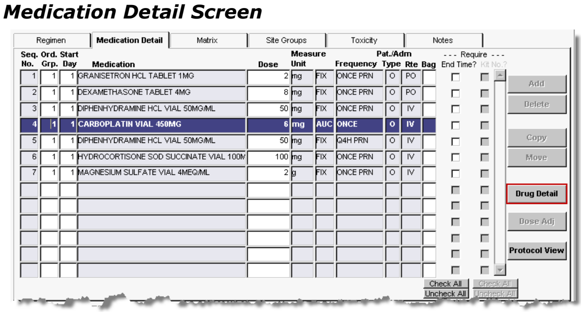
1. **Select Pharmacy > Regimen Specification**. Use the **search** button to find a regimen to review. Information is located on the various tabs.

Regimen Displays the high level details of the regimen (Clinical Trial, Repeat Period, # of Days per Course, associated Pre and Post anti-emetic regimens, etc.).

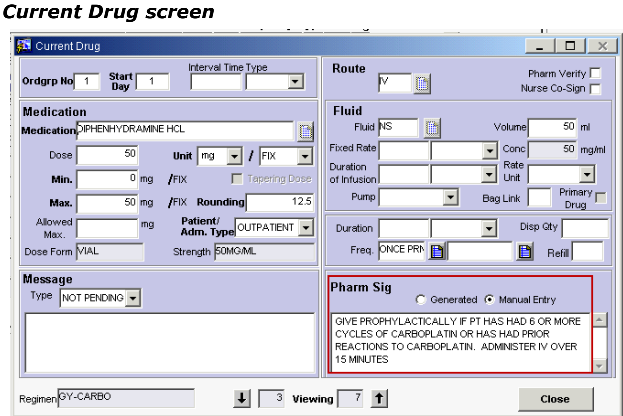


Medication Individual medications are added and **Details** defined here. Admin instructions are visible using the **Drug Detail** button.

Medication Detail Screen



Current Drug screen



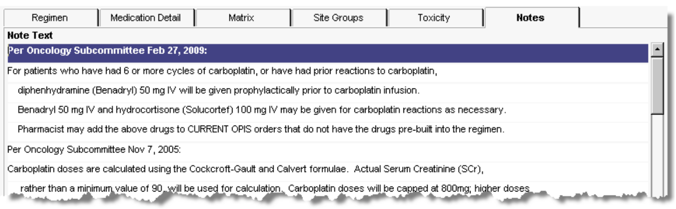
Matrix Medications are associated to the various Treatment days here.

Site Groups Regimen is associated with the various site groups here.

Toxicity Not in use at PMH at this time.

Notes Information specific to the regimen is defined here, (study info, bloodwork parameters, dose adjustments, administration requirements, etc.)

Regimen Notes screen



NOTES:

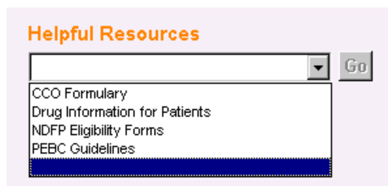
CCO RESOURCE LINKS

Cancer Care Ontario provides several links within OPIS to information on their website.

On Main Menu

Helpful Resources provides links to:

- CCO Formulary
- Drug Information for Patients
- New Drug Funding Program Eligibility Forms
- Program Evidence-Based Care Guidelines



On various Function Screens

- The buttons are active if there is a valid link to a Provincial Regimen and there is content to display.
- There will not be content for Clinical Trial Regimens.

Regimen Specific (applies to the selected regimen)		
Reg Monograph	Monograph for the regimen	Located in Chemo Order Entry, Medication Admin, Regimen Specification
PEBC	Program Evidence-Based Care information	Located in Chemo Order Entry, Medication Admin, Regimen Specification
Description	Short provincial formulary regimen description	Located Regimen Specification
Drug Specific (applies to the selected drug)		
Drug Monograph	Drug monograph	Located in Chemo Order Entry, Medication Admin, Regimen Specification
Patient Drug Info ENG	Information about the drug for the patient (English)	Located in Chemo Order Entry, Medication Admin, Regimen Specification
Patient Drug Info FR	Information about the drug for the patient (French)	Located in Chemo Order Entry, Medication Admin, Regimen Specification
FDB Monograph	First Databank Drug Monograph	Located in Chemo Order Entry, Medication Admin, Regimen Specification