

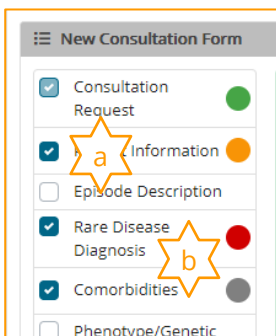
ERN-CPMS CONSULTATION FORM

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

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

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

THE SECTION SELECTOR



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

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

SAVE/CANCEL/CLOSE

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

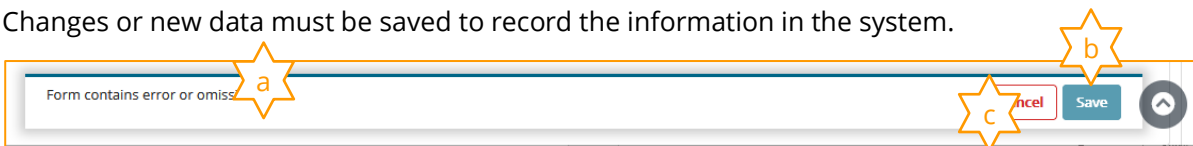


Figure 11 – Form Action Bar – see below for details

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



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

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

DATA ENTRY

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

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

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



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

PROGRESSIVE DISCLOSURE AND DYNAMIC FIELDS

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

REPEATING DATA

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

Example: Consultation Form - Episode Description - Main Symptoms.

SUPPORTED TERMINOLOGY SYSTEMS

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

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

DATA INTEGRITY

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

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

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

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

REQUIRED/EXPECTED/OPTIONAL DATA

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

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

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

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

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

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

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

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

DATA VALIDITY

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

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

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

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

FORM AND SECTION VALIDATION

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

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

THE CASCADING EFFECT (FIELD TO SECTION)

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

For example:

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

USER PERMISSIONS

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

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

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

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

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