



Consent to Contact for Research: Researchers' Report

Standard Operating Procedure

Version 7.0

September 29th, 2017



fraserhealth

Research & Evaluation



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Overview of Consent to Contact for Research

The 'Consent to Contact Researchers' Report is a Meditech report that includes the data of patients/clients who have given consent to have both their contact information and their medical records made available to FH researchers. Prior to running the report, please read the following:

- Although consent to contact does not need the approval of the Fraser Health Authority Research Ethics Board (FHREB), if the consent to contact is to be utilized as a strategy for subject recruitment, then it must be noted in the FHREB submission protocol as part of the subject recruitment strategy.
- The Meditech researchers' report is available for use by Fraser Health researchers only (i.e. staff or privileged physicians). Non-FH researchers (i.e. academic affiliated researchers) are not permitted to run the Meditech report; Fraser Health Privacy prohibits disclosure of personal information outside of Fraser Health without written consent
- If a subject is identified from the "researchers' report" as potentially eligible for a particular study, but the researcher requires further medical information, then the researcher can access the clinical Meditech profile (EMR) to confirm eligibility. This process will not be considered a breach of BC Privacy regulations or FHA policy.
- Initial contact with potentially eligible patients/clients and the IFC process must be done by a Fraser Health researcher, otherwise, it is considered to be soliciting on behalf of another organization and therefore not permitted by the Fraser Health Privacy office.

Tips for running the report

1. **Use a Wired Internet Connection:** Make sure you are connected to a wired internet connection rather than wireless, as wireless connections can take significantly longer to run the report.
2. **Use Smaller Date and Age Ranges:** Larger ranges mean the report will have to look at a wider collection of records. The smaller the range, the faster the report will run. Here is an example of how long it can take to run one type of report.

Site	Jim Pattison
Number of days included in date range	3
Age Range	50-55
Number of patients returned	40
Time take to run the report	9min and 30sec

3. **Run the Report in Segments:** If you need to run a large report, running the report in smaller segments is quicker and less error prone. For example, instead of running a report for the entire month of July, running a single report for each weekend and combining the data after would be more efficient. Running a report for an entire month could take a very long time, and any disruptions to a computer's network connection could halt the entire report.
4. **Duplicate patient records:** Your report may contain some duplicate patient names for the selected service date range. The duplication is because the patient had two distinct visits (each with a different

account number) and/or the patient had a few different orders during the service date range selected. In order to remove the duplicate patient names, please see section "6. Report interpretation", on page 11.

5. **Questions or need help:** Send an email to consenttocontact@fraserhealth.ca.

How to request access to the Meditech report

New Meditech Users:

1. Navigate to <http://tsrequest.phsa.ca/FormEntry.aspx?ID=82>
2. Select "FHA - Network (Windows), E-mail, and Meditech Account Management"
3. Fill out the Requestor Information fields
4. Select "New FHAM Account"
5. Under FHAM Access Details, enter the following: "Please provide the following NPR Report: ADM.PAT.zcus.is.consent.to.contact.for.research.purposes"
6. Unless required, Select "No" for OE, ADM, and CWS access.
7. Request that your Meditech user profile shadow that of Anat Feldman.

Existing Meditech Users:

1. Navigate to <http://tsrequest.phsa.ca/FormEntry.aspx?ID=82>
2. Select "FHA - Network (Windows), E-mail, and Meditech Account Management"
3. Fill out the Requestor Information fields
4. Select "Change FHAM Account"
5. Under FHAM Access Details, enter the following: "Please provide the following NPR Report: ADM.PAT.zcus.is.consent.to.contact.for.research.purposes. DO NOT CHANGE any existing Meditech menus."
6. Request Meditech user profile to shadow that of Anat Feldman.

Obtaining approval to run the report

- Obtain a copy of the Researchers' Report Access Request Form from the DERS website (http://research.fraserhealth.ca/media/2015-02-16_Request-form-for-meditech-report-access_FINAL.pdf).
- Once the Researchers' Report Access Request Form has been reviewed, you will receive an email response indicating that you are approved to use the Meditech researchers' report.
- If you do not currently have M drive access, please request access to the Research and Evaluation M drive (under the Corporate folder) for data storage. This request can be found at: <http://tsrequest.phsa.ca/FormEntry.aspx?ID=82>

What data will the report show me?

This report will display **patients** who have responded "yes" when asked if they **would like to be contacted for research purposes**. **The following fields will be included in the report:**

- | | |
|-----------------------|-----------------------|
| 1) Patient LAST NAME | 18) Guarantor Address |
| 2) Patient FIRST NAME | 19) Reason for Visit |
| 3) Med Rec Num (MRN) | 20) Location |
| 4) Account Number | 21) Guarantor City |

- | | |
|--------------------|---|
| 5) Reg Category | 22) Guarantor Province |
| 6) Birth Date | 23) Guarantor Postal Code |
| 7) Age | 24) Guarantor Home Phone |
| 8) Sex | 25) Relation |
| 9) Address | 26) Departure Disposition I |
| 10) City | 27) Departure Diagnosis I |
| 11) Province | 28) Discharge Date II |
| 12) Postal Code | 29) Discharge Diagnosis II |
| 13) Language | 30) Order Categories |
| 14) Home Phone | 31) Consent to Being Contacted for Research |
| 15) Service Date I | 32) Date Asked |
| 16) Admit Date II | 33) Registered to Palliative Care |
| 17) Guarantor Name | |

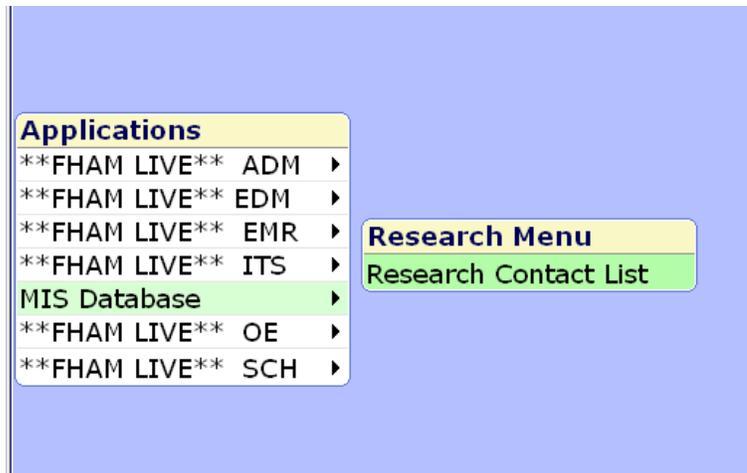
- I. *Appears only for Outpatients*
- II. *Appears only for Inpatients*

Please note that the fields pertaining to Departures and Discharges (26-29) are free text fields, and may not return data that is consistent amongst all patients.

Running the report

Accessing the Report from Meditech:

1. Sign into Meditech FHAM.LIVE
2. Click MIS Database > Research Menu. Select "Research Contact List".



3. Select your facility (this means that patients from only this facility will be pulled), or type the facility name in Capital Letters.

Facility	Name
CAC	Czorny Alzheimers Centre
DH	Delta Hospital
FLW	CareLife Fleetwood
LMH	Langley Memorial Hospital
PAH	Peace Arch Hospital
SCSC	Pattison Outpatient Centre
SMH	Surrey Memorial Hospital
YRC	Yale Road Centre

Selecting run-time parameters:

Before the report is run, there are a few parameters that need to be defined. Selecting new values can be done by pressing the F9 key. The following constraints will determine which patients are included in the Meditech report:

1. **From & Thru Admit/Service Date:** Specifies the dates at which patients visited their respective facility.
2. **Facilities:** By default, this field will be set to return patient data from all facilities the user has access to. Users can select a single facility or multiple facilities. To change this:
 - a. Click the "All" listed in facilities
 - b. Press F9
 - c. Erase "All"
 - d. Select the appropriate facility
 - e. Add facilities as needed
3. **Outpatient/Inpatient/Both:** For facilities that have both Inpatients and Outpatients, either or both patient types can be selected.

4. **Age:** This defines the lower and upper age limits of patients selected.

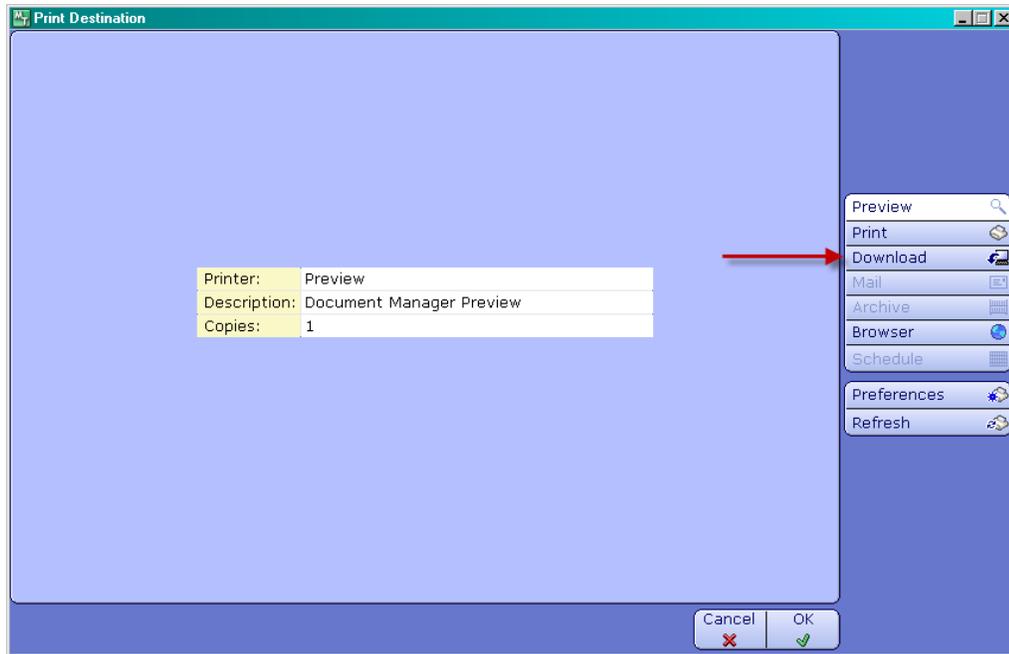
*From Admit/Service Date	01/05/14	Facilities
*Thru Admit/Service Date	31/05/14	
Outpatient/Inpatient/Both	BOTH	SCSC
Age >=	50	
Age <=	55	

Saving the report:

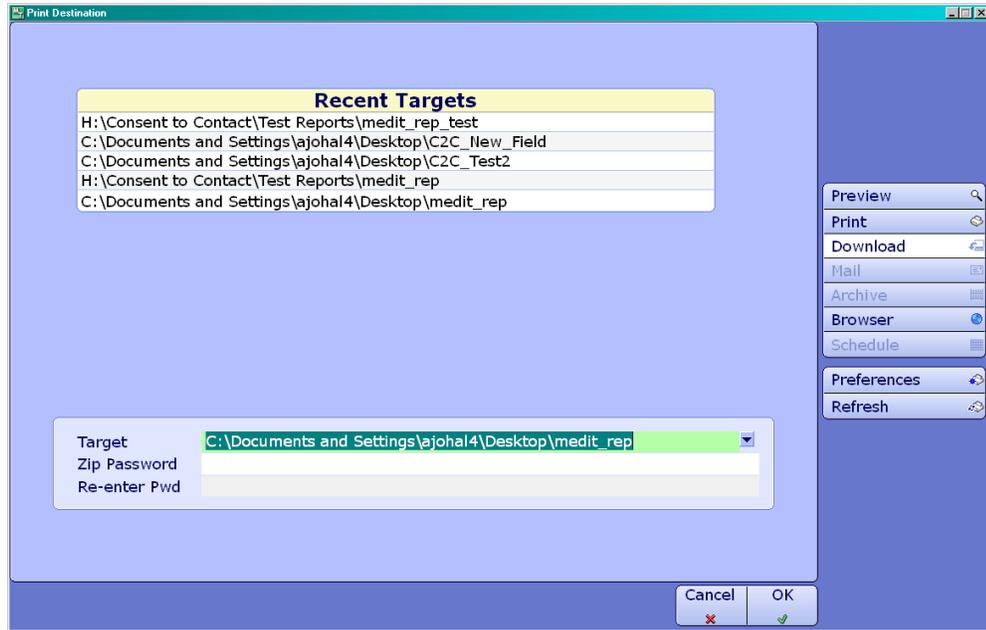
Accessing the research and evaluation M drive folder

As specified by Fraser Health Privacy, all reports must be saved to the **M: Drive**.

After defining the parameters, click the Download button.



From there, you will see a screen similar to the one below:



The Target field is where the report will be saved. Once you have selected a folder on the M: Drive, click OK, and the report will run.

The Zip Password field should be left unfilled. Entering a Zip Password into this field will result in an illegible report format.

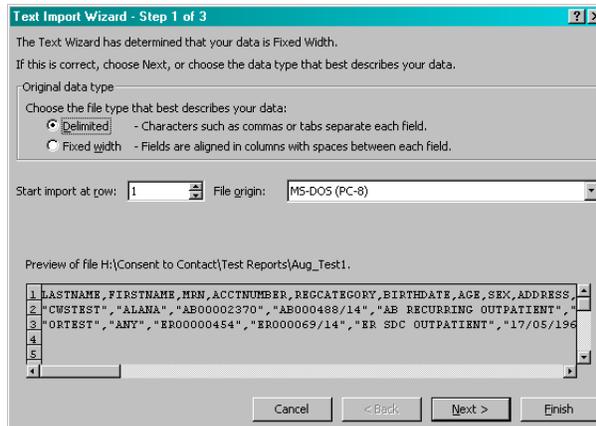
Importing the report to Excel:

After running the report, Meditech will produce a text file that will look something like this:

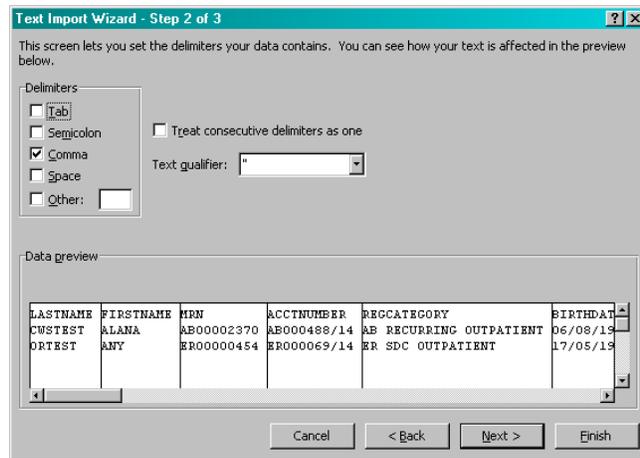
```
LASTNAME, FIRSTNAME, MRN, ACCTNUMBER, REGCATEGORY, BIRTHDATE, AGE, SEX, ADDRESS, CITY, PROVINCE, POSTALCODE, LANGUAGE, HOMEPHONE, SERVICEDAT  
E, ADMITDATE, REASONFORVISIT, LOCATION, GUARANTORNAME, GUARANTORADDRESS, GUARANTORCITY, GUARANTORPROVINCE, GUARANTORPOSTALCODE, GUARANT  
ORHOMEPHONE, GUARANTORRELATION, ACCIDENT/OCCURRENCE, DEPARTUREDISPOSITION, DEPARTUREDIAGNOSIS, DISCHARGEDATE, DISCHARGEDIAGNOSIS, CAT  
EGORIES, CONSENT TO BEING CONTACTED FOR RESEARCH, DATEASKED, REGISTEREDTOPALLIATIVECARE,  
"CWSTEST", "ALANA", "AB00002370", "AB000488/14", "AB RECURRING OUTPATIENT", "06/08/1998", "16", "F", "7371 101 ST", "PITT  
MEADOWS", "BC", "V7K 4N4", "", "(778)808-8678", "04/07/2014", "", "", "AB GENERAL DAY CARE", "CWSTEST, LYNDA", "7371 101 ST", "PITT  
MEADOWS", "BC", "V7K 4N4", "(604)355-1625", "MOTHER", "", "", "Yes", "28/02/2014", "",  
"ORTEST", "ANY", "ER00000454", "ER000069/14", "ER SDC OUTPATIENT", "17/05/1964", "50", "M", "9631 128 STREET", "SURREY", "BC", "V0S  
2L0", "", "(604)555-5555", "14/07/2014", "", "", "ER OPERATING ROOM", "", "", "", "", "", "", "", "", "Yes", "12/03/2014", "",
```

In this format, there is not much this report will tell us. That being said, the text file can be easily imported into Excel:

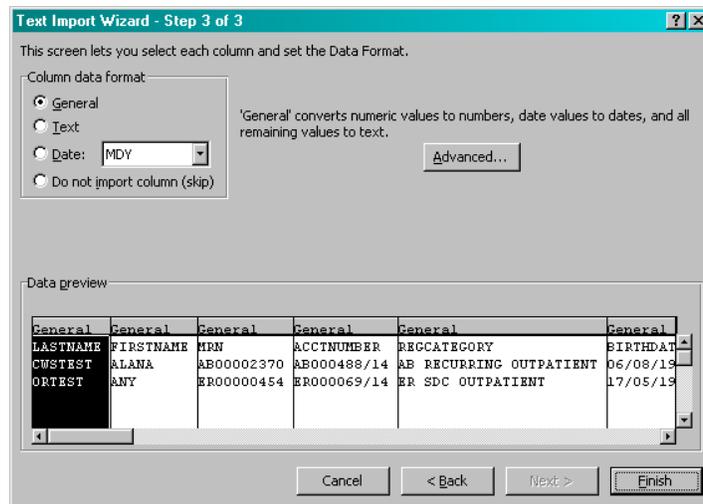
1. Open Excel and click File>Open
2. Under File Type, make sure "All Files" Is selected and open the Report file.
3. Select "Delimited" and click next



4. Select "Comma" and click next



5. Select "General" and click Finish



The Researcher's Report will now be in a more intuitive and flexible Excel format. This file should only be stored on the **M: Drive**.

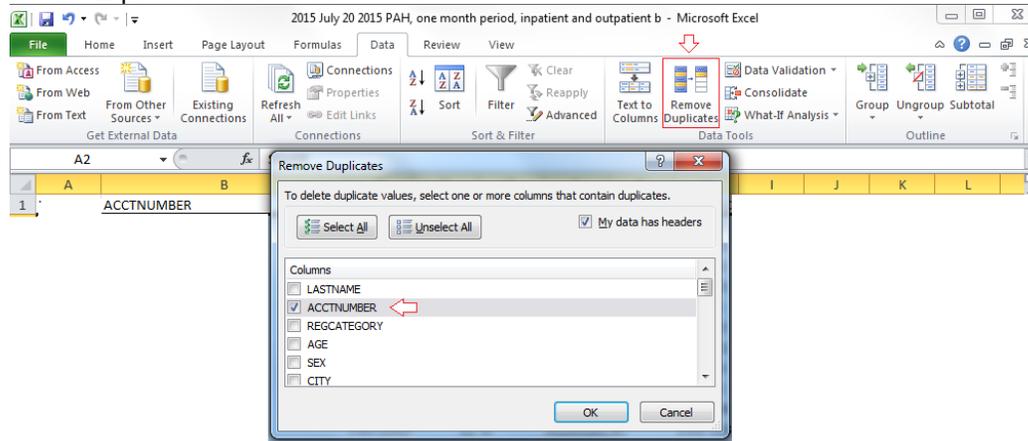
Consent to Contact Report (De-identified)1 [Compatibility Mode]

	A	B	C	D	E	F	G	H
	LASTNAME	FIRSTNAME	MRN	ACCTNUMBER	REGCATEGORY	BIRTHDATE	AGE	SEX
1	Last1	First1	AB00002370	AB000488/14	SCSC CLINICAL OUTPATIENT	January	50	F
2	Last2	First2	ER00000454	ER000069/14	SCSC CLINICAL OUTPATIENT	February	55	M
3	Last3	First3	AB00002371	AB000488/15	SCSC CLINICAL OUTPATIENT	March	54	F
4	Last4	First4	ER00000455	ER000069/15	SCSC CLINICAL OUTPATIENT	April	54	F
5	Last5	First5	AB00002372	AB000488/16	SCSC CLINICAL OUTPATIENT	May	52	F
6	Last6	First6	ER00000456	ER000069/16	SCSC CLINICAL OUTPATIENT	June	54	F
7	Last7	First7	AB00002373	AB000488/17	SCSC CLINICAL OUTPATIENT	July	50	M
8	Last8	First8	ER00000457	ER000069/17	SCSC CLINICAL OUTPATIENT	August	54	F
9	Last9	First9	AB00002374	AB000488/18	SCSC CLINICAL OUTPATIENT	September	52	M
10	Last10	First10	AB00002375	AB000488/19	SCSC CLINICAL OUTPATIENT	October	50	F

6. Report interpretation

You may notice on the report that some patients appear as a duplicate, for the selected service date range. There are a few scenarios in which this can happen:

- On the service date range selected, the patient had two distinct visits (each with a different account number);
- The patient had a few different orders. Listed are some examples on how each order appears in the report: "Radiography, Imaging, Laboratory, Computed Tomography, Bone Density, Echocardiology, etc".
- In order to remove the duplicate accounts listed in Excel, go to the "Data" page; followed by "Remove Duplicates" application. Select as the "acctnumber" column as the column that contains the duplicates. Choose to "Expand the Selection".



Script for contacting patients

Please note that Fraser Health Researchers should make the initial patient contact (and not their Research Partners from other Institutions).

Hello my name is XXXX and I am a researcher calling from the Fraser Health Authority. While registering for your appointment at the Jim Pattison Outpatient Care and Surgical Centre, you gave consent for a Fraser Health researcher to contact you and review your medical records to determine if you might be eligible to participate in a research study.

Your consent allowed me to determine that you are a potential candidate for participation in a research study that I am conducting here at Fraser Health.

Are you interested in hearing more about participating in this research study?

"Yes", proceed to Section A.

"No", proceed to Section B.

Section A.

I can provide you with information about the study now over the phone, or can mail or email it to you, or I can arrange for you to come to our office to speak either myself or a study team member. How would you like to get more details about this study?

Thank you for this information [insert other language as applicable]

Before we wrap up this call, I'd like you to know that if you do not want to receive calls like this again, and would like to withdraw your consent, you may do so at any time. Next time you speak to a registration clerk ask to have your consent to be contact be removed from your file, or you can send an email to consenttocontact@fraserhealth.ca stating you wish to have your name removed from the database.

Thank you. I appreciate your taking the time to speak with me today and will send/phone, email/meet you/with you to give you the required information.

Section B.

I appreciate your taking the time to speak with me today.

If you do not want to receive calls like this again, and would like to withdraw your consent, you may do so at any time. Next time you speak to a registration clerk ask to have your consent to be contact be removed from your file, or you can send an email to consenttocontact@fraserhealth.ca stating you wish to have your name removed from the database.

Thank you very much and have a good day.

Protocol for contacting minors

During registration, staff are asking the consent to contact for research and review of medical records to minors (in BC ages 19 and under), when a guarantor is present. The researcher's report has a field for the guarantor information. When searching for potential research participants, it is crucial for the researcher to check the date consent was given. If a guarantor gave consent on behalf of a minor, and the minor became an adult during that timeframe (of a maximum of 10 years), then the consent is no longer valid, and you are asked to email: consenttocontact@fraserhealth.ca to have the patient's name removed from the report. Please list the following fields in the email: patient's name, mrn and account number listed.

Protocol for addressing patients who want to withdraw their consent

If a patient requests their information to be removed from the report, please email : consenttocontact@fraserhealth.ca to have it removed.

Please list the following fields in the email: patient's name, mrn and account number listed.

Protocol for addressing patients who appear in the report and are deceased

If a researcher runs the report and finds a deceased patient listed, please email consenttocontact@fraserhealth.ca to have this patient's name removed.

Please list the following fields in the email: patient's name, mrn and account number listed.

(Internal, for DERS only): Requesting total numbers for Y,N,U

DERS staff should contact Registration Services for an accurate number of Y, N, and U, on March 31st, in order to have this number available for fiscal year reporting.