



3CTN Reporting Portal User Training

Portfolio and Patient Related

Account Activation

- Bookmark this link: <https://edge-canada.ca/>
- **Login** using the name and password provided to you

Forgot Password?

- Click on **FORGOTTEN YOUR PASSWORD?** Follow the on-screen prompts on the login screen and answer any security questions to reset your access.
- If you are still unable to access your account, please contact your Local Administrator.

Patient Reporting – Mandatory Information

Patient Information:

- **Subject ID** – used for patient verification
- **Date consented** – used for multi-staged registration trials
- **Date recruited/randomized** – used to track patient recruitment by quarter

Supplemental, Priority Patient Information (for AYA or Remote trial participants only):

- **AYA Patient?** (age 15-39) – Yes or No
- **Remote Patient?** – Yes or No
- **Satellite Site Name** – Full name of satellite site
- **Type of Satellite Site** – Primary Oncology Site or Closer to Home Healthcare provider
- **Initial Date of Remote Trial Access** – Date patient receives initial trial related care/support at satellite site

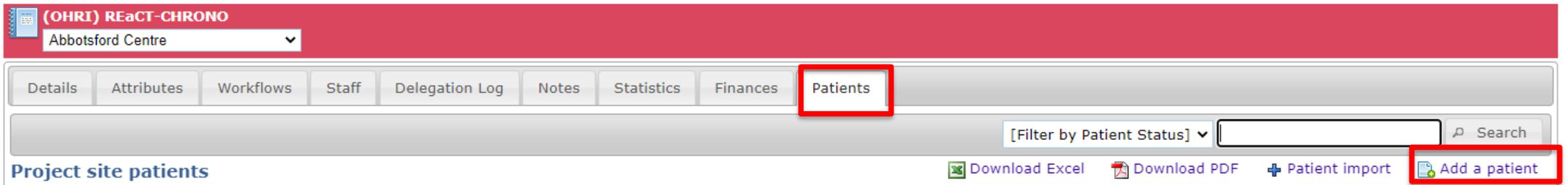
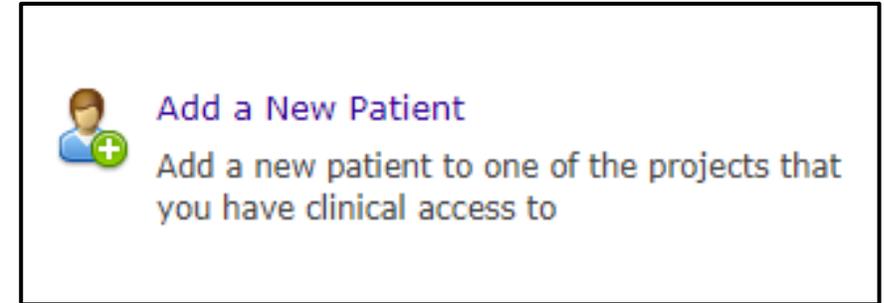
Manually Adding a Patient - Options

There are **2** ways to manually add patients to EDGE:

A. Using the “Add a New Patient” button on the home page

OR

B. At the project site level (red banner) of a trial



Note: Both these options require you to have Clinical access to the project site level of the trial and the trial should be open to recruitment at your project site level.

Option A: Adding a Patient – Patient Details

Project and Project Site
Select a project and project site that you want to recruit a patient to

Project
(CCTG) CE.7

Project site
Princess Margaret Cancer Centre



Patient Identifier
Enter the unique number used to identify your patient

Local Number

Optional Field



Project Data
Enter project specific data about your patient

Subject ID

Screening ID

Other ID

Project arm

Responsible Physician

Referring site

Date referred

Optional Fields



Patient Details
Verify or enter your patients details

First Name

Last Name

Gender

Optional Field

Option A: Adding a Patient – Patient Status Dates

Patient Status
Enter all the dates up to the current status of your patient

Pre-Screened	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
Approached	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
 Consented	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
Screened	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
 Recruited / Randomised	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
On treatment	<input type="text"/>		by	Schoales, Mr James ▼
On follow-up	<input type="text"/>		by	Schoales, Mr James ▼
Completed	<input type="text"/>		by	Schoales, Mr James ▼

Patient is off study

Note: All previous dates must also be filled in, so you can copy the date consented or recruited / randomised. In this example only *Date Recruited* was provided, therefore that was used for previous status entries

Option B: Adding a Patient – Within the Project Site level

(OHRI) REaCT-CHRONO
Abbotsford Centre

Details Attributes Workflows Staff Delegation Log Notes Statistics Finances **Patients**

View audit Transfer ownership

Details

Timeline

Files

Collaborators

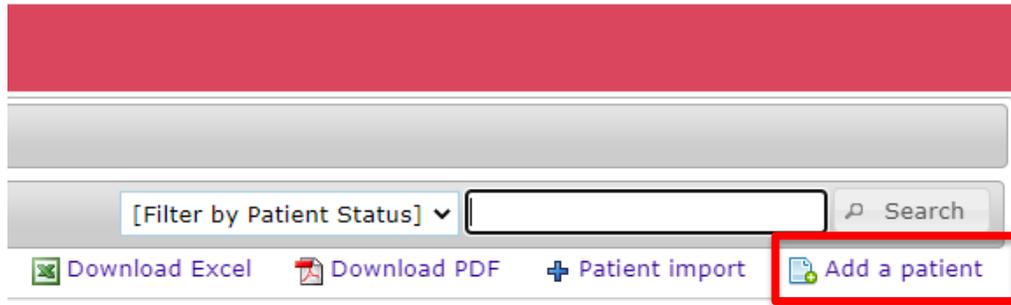
Settings

Project site details

Details Edit Swap Site

Owned by:	Canadian Cancer Clinical Trials Network (3CTN)
Site (Parent):	Abbotsford Centre (BC Cancer)
Status (Status date):	Open to recruitment (10/06/2021)
Type:	Recruiting Site Only
Project Site Number:	
Qualified Investigator:	Abele, Jonathan
Site target recruitment:	10
Patient data collection plan:	Canada
Patient identifier type:	Local Number

Option B: Adding a Patient – Patient Details



[Filter by Patient Status] Search

 Download Excel
  Download PDF
  Patient import
  **Add a patient**



Patient Identifier
Enter the unique number used to identify your patient

Local Number

Optional Field



Project Data
Enter project specific data about your patient

Subject ID

Screening ID

Other ID

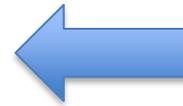
Project arm

Responsible Physician

Referring site

Date referred

Optional Fields



Patient Details
Verify or enter your patients details

First Name

Last Name

Gender

Optional Field

Option B: Adding a Patient – Patient Status Dates

Patient Status
Enter all the dates up to the current status of your patient

Pre-Screened	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
Approached	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
 Consented	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
Screened	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
 Recruited / Randomised	<input type="text" value="02/05/2022"/>		by	Schoales, Mr James ▼
On treatment	<input type="text"/>		by	Schoales, Mr James ▼
On follow-up	<input type="text"/>		by	Schoales, Mr James ▼
Completed	<input type="text"/>		by	Schoales, Mr James ▼

Patient is off study

Note: All previous dates must also be filled in, so you can copy the date consented or recruited / randomised. In this example only *Date Recruited* was provided, so that was used for previous status entries



Bulk Import of Patients

Management tab import (Bulk Import)

- Allows admin level users to import patients to multiple projects/project sites at once regardless of project or project site status
- Can be mapped to an existing MS Excel file.

The screenshot shows the 'edge' web application interface for Sunnybrook Health Sciences Centre, Odette Cancer Centre. The user is logged in as 'Xu, Rebecca'. The navigation menu includes Home, Management, Library, Projects, Sites, Patients, Reports, Support, and KnowledgeBase. The 'Management' tab is active, and the 'Import/Export' sub-tab is selected. The main content area is titled 'Import Patient Mappings' and shows a table with one entry: '3CTN Bulk Importing'. To the right, there is a configuration table for '3CTN Bulk Importing' with columns for 'Patient field', 'Source column', and 'Override value'.

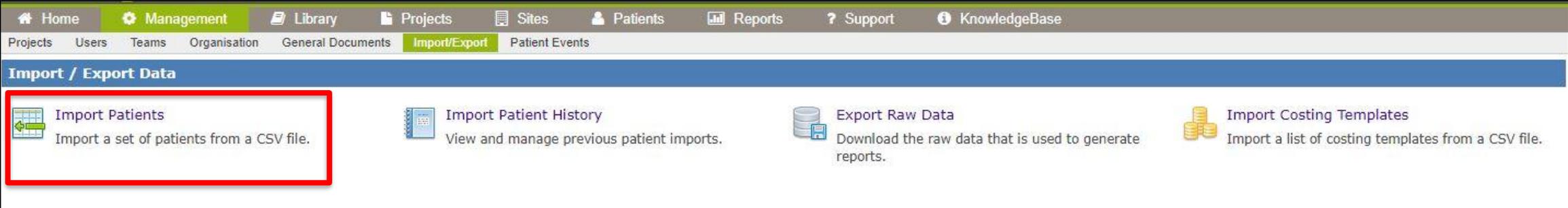
Patient field	Source column	Override value
Project Short Title	1	
Site Name	0	
Identifier Number		
Title		
First Name		
Last Name		
Date of Birth		
Gender		
Date of Death		
Date Screened	5	3CTN, Administrator
Screened By		3CTN, Administrator
Date Recruited	6	
Recruited By		3CTN, Administrator
Date Off Study		
Off Study By		
Off Study Reason		
Off Study Decision		
Off Study Description		
Subject ID	4	
Project Arm		
Referring Site		
Responsible Physician		
Participant type		

Bulk Import of Patients - Navigation



The screenshot shows the 'Management' menu highlighted in green. Below it, the 'Import/Export' option is highlighted with a red box. The menu items are:

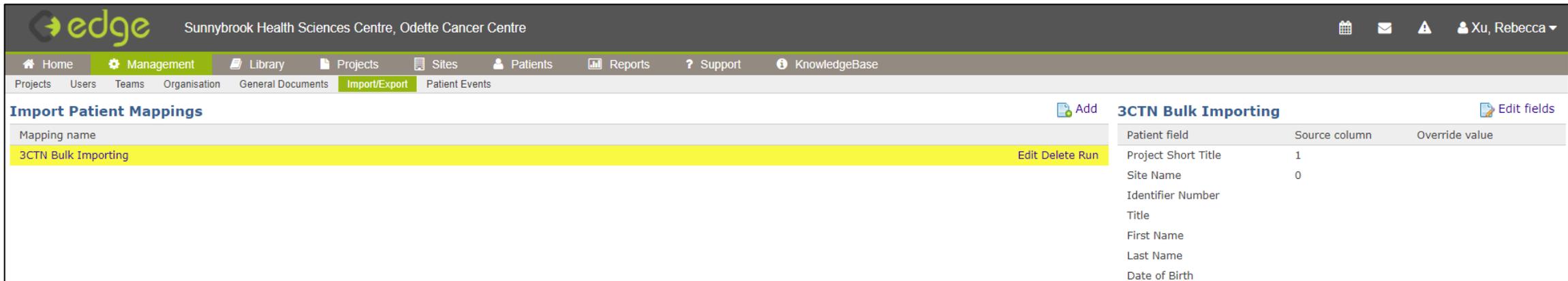
- Projects**: Add new projects and manage global Project settings.
- Users**: Provides management functionality for users.
- Teams**: Provides functionality to manage Teams, Team Members and Team Leaders.
- Organisation**: Manage your Organisations details.
- General Documents**: Upload and manage the available types of general, non-project related documents.
- Import/Export**: Provides functionality for bulk imports and exports from EDGE. (Highlighted with a red box)
- Patient Events**: View all Patient Events that have been raised in the system.



The screenshot shows the 'Import/Export' sub-menu highlighted in green. Below it, the 'Import Patients' option is highlighted with a red box. The sub-menu items are:

- Import Patients**: Import a set of patients from a CSV file. (Highlighted with a red box)
- Import Patient History**: View and manage previous patient imports.
- Export Raw Data**: Download the raw data that is used to generate reports.
- Import Costing Templates**: Import a list of costing templates from a CSV file.

Bulk Import Map and Reference Excel



The screenshot shows the 'edge' system interface for Sunnybrook Health Sciences Centre, Odette Cancer Centre. The 'Import/Export' menu is active, displaying 'Import Patient Mappings'. A mapping named '3CTN Bulk Importing' is selected. To the right, a table lists patient fields and their corresponding source columns and override values.

Patient field	Source column	Override value
Project Short Title	1	
Site Name	0	
Identifier Number		
Title		
First Name		
Last Name		
Date of Birth		

0

1

4

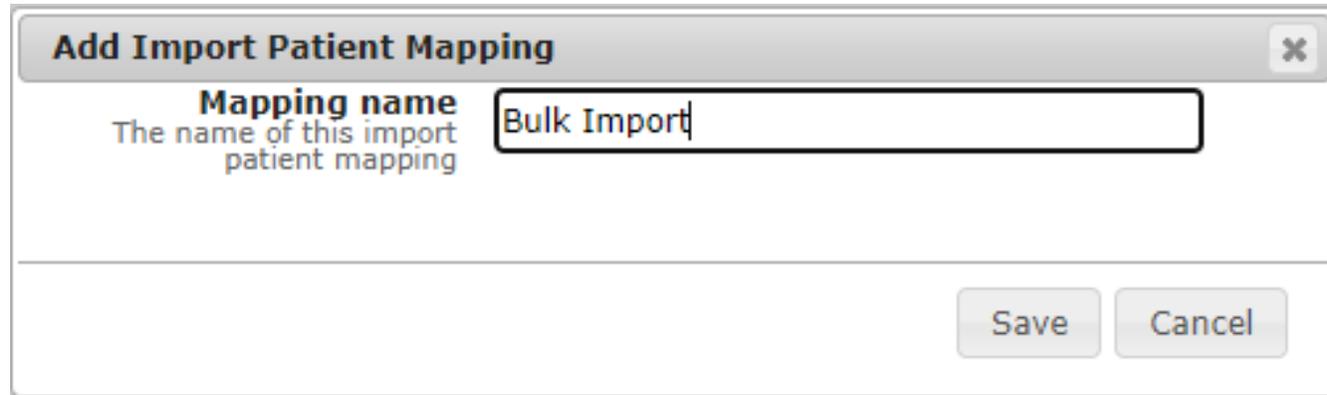
5

6

Site name	Short Title	Full Title	Clinical trials gov number	Patient Subject ID <i>(Note: Please right click to insert more rows for more than one patient)</i>	Patient Consented Date for Multi-Staged Trials <i>(use this column to report the Patient consented dates for 1st recruited patients for multi-staged trials) Note: This column will be used to reassess IBF factors for Multi-Staged trials</i>	Patient Recruited Date <i>(dd/mm/yyyy) (Note: Please highlight if you include last or next period accrual)</i>
Sunnybrook Health Sciences Centre, Sunnybrook Research Institute	Refresher Training Import Demo			test001	15-Apr-22	16-Apr-22

Bulk Importing – Custom Mapping

- In the management tab click on *Import/Export*, followed by *Import Patients*
- Click “*Add*” in the right-hand corner and enter a name for your Import Template



Add Import Patient Mapping [X]

Mapping name
The name of this import patient mapping

Bulk Import

Save Cancel

Bulk Importing – Custom Import Map Fields

- Click on the name of your Import Template then in the right-hand corner click *Edit Fields*
- Identify which columns in your csv file correlate to each data field (e.g. column A = 0 = *Site Name*)
- If you don't have a column for a non-mandatory field, designate an override value (e.g., Schoales, James for Screened By)

Update Import Patient Mapping Fields ✕

	Source column	Override value
Project Short Title * <small>The Project Short Title / acronym</small>	1	
Site name * <small>The recruiting sites name</small>	0	
Identifier Number <small>The patients identifying number</small>		
Title <small>The patients title</small>		
First Name <small>The patients first name</small>		
Last Name <small>The patients last name</small>		
Date of birth <small>The patients date of birth</small>		
Gender <small>The patients gender</small>		
Date of death <small>The patients date of death</small>		
Date screened * <small>The screening date</small>	6	
Screened by * <small>The screening user</small>		Schoales, James
Date recruited <small>The recruiting date</small>	6	
Recruited by <small>The recruiting user</small>		Schoales, James

Bulk Importing – Running Import

- Click on run to the right of the Import map you want to use

Import Patient Mappings Add	
Mapping name	
3CTN Bulk Importing	Edit Delete Run

- Choose your import file that has been saved as a .csv file

Choose a file to upload... ✕

File No file chosen

Column separator
The delimiter used in this file i

Bulk Importing – Import File Verification

- Once Import template is set up, ensure:
 - Excel is formatted correctly
 - Saved as a .CSV file
- Date format should be *dd/mm/yyyy*
- ***Project Site*** name and ***Project Short title*** should match what is in EDGE
- Make sure the ***Project Site*** is attached to the trials



Bulk Importing – Check the Data, Validate and Import

Once imported, review the *import preview pane* to verify which patients are being imported and to identify data errors.

Home Management Library Projects Sites Patients Reports Support KnowledgeBase

Projects Users Teams Organisation General Documents Import/Export Patient Events

Import Patient History

Import status: Reviewing Validate all rows Import Patients
Filename: Importing Template CSV.csv
Imported by: 3CTN, Administrator
Date of temp import: 19/04/2022 8:40 AM
Date of patient import:

Import Patient History Temp Data

Total rows: 5 **Valid rows:** 1 **Invalid rows:** 0 **Ignored rows:** 4 **Warning rows:** 0

Items per page: Filter by:

Prev 1 Next
(5 records returned)

	Valid	Error messages	Project Short Title	Site Name	Identifier Number	Title	First Name	Last Name	Date of Birth	Gender	Date of Death	Date Screened	Screened By	Date Recruited	Recruited By	Date Off Study	Off Study By	Off Study Reason	Off Study Decision	Off Study Description	Subject ID	Participant Type	Project Arm
Edit details Edit dates	✔		Refresher Training Import Demo	Sunnybrook Health Sciences Centre, Sunnybrook Research Institute								15/04/2022	3CTN, Administrator	16/04/2022	3CTN, Administrator						test001		

Priority Patient Tracking

Priority patient information will be tracked at the patient level. Patients will have to have been added to the trial beforehand (manually or imported).

Priority Patient Information (filled out for AYA or Remote patients only):

Data Field	Options
AYA Patient? (age 15-39)	Yes or No
Remote Patient?	Yes or No
Satellite Site Name	Full name of Satellite Site
Type of Satellite Site	Primary Oncology Site or Closer to Home Healthcare provider
Date of Remote Access Initiation	Date patient receives trial related care/support at satellite site

Definitions available: <https://3ctn.ca/files/remote-access-ibf-definition>

Priority Patient Tracking - Navigation

- Go to *Projects* tab and search for the trial
- Select your *Project Site* Name to the right of the trial information

Home Management Library **Projects** Sites Patients Reports Support KnowledgeBase

Type: **Assigned Projects** Organisation Projects Global Projects

EDGE ID:

Title/Summary: **chrono** Project Local Reference:

Project type: Pick... Disease area: (All)

Project status: Pick... Disease site: (All)

Visibility: (All)

Clinical Trials Gov:

Protocol ID:

Containing project tags: Select tags...

More options...

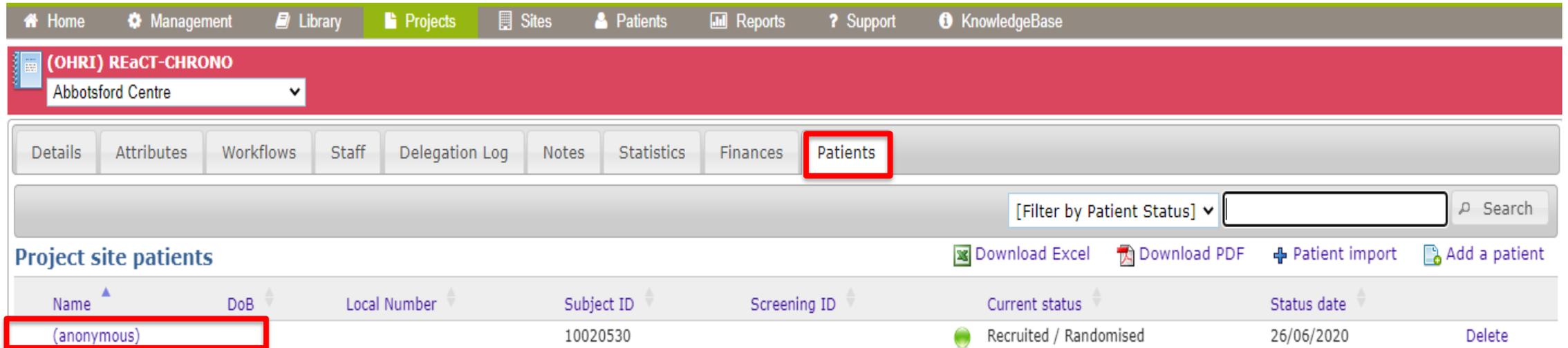
Search results (1 records returned)

Prev 1 Next

Project Local Reference	Clinical Trials Gov	Short Title	Full Title	Owner	Status	Sites
Chrono 2021	NCT04864405	(OHRI) REaCT-CHRONO	A Pragmatic Randomised, Multicentre Trial Evaluating the Dose Timing (Morning vs Evening) of Endocrine Therapy and Its Effects on Tolerability and Compliance (REaCT-CHRONO)	Canadian Cancer Clinical Trials Network (3CTN)	Open, not yet recruiting	Abbotsford Centre(Open to recruitment) The Hospital for Sick Children(Open to recruitment) The Ottawa Hospital Cancer Centre(Open to recruitment)

Priority Patient Tracking - Navigation

- At the project site level (red banner) click the patient tab
- Click on patient's "name" to the left of the patient information

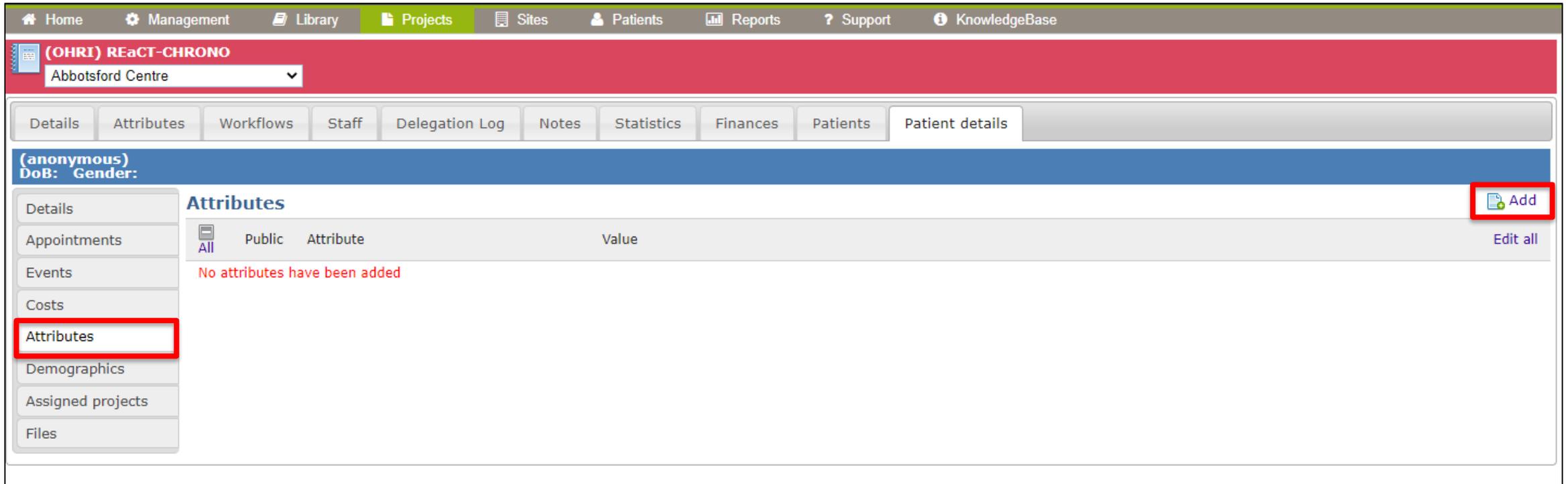


The screenshot shows the web application interface for tracking patients. At the top, a navigation bar includes links for Home, Management, Library, Projects, Sites, Patients, Reports, Support, and KnowledgeBase. Below this, a red banner displays the project name "(OHRI) REaCT-CHRONO" and the site "Abbotsford Centre". A secondary navigation bar contains tabs for Details, Attributes, Workflows, Staff, Delegation Log, Notes, Statistics, Finances, and Patients, with the Patients tab highlighted by a red box. A search bar with a dropdown menu for "Filter by Patient Status" is located below the tabs. The main content area, titled "Project site patients", features a table with columns for Name, DoB, Local Number, Subject ID, Screening ID, Current status, and Status date. The "Name" column contains the text "(anonymous)", which is highlighted by a red box. To the right of the table are buttons for "Download Excel", "Download PDF", "Patient import", and "Add a patient".

Name	DoB	Local Number	Subject ID	Screening ID	Current status	Status date	
(anonymous)			10020530		Recruited / Randomised	26/06/2020	Delete

Priority Patient Tracking – Data Entry

- At the *Patient* level, go to *Attributes*
- Select *Add*



The screenshot shows the user interface for the Priority Patient Tracking system. At the top, there is a navigation bar with tabs for Home, Management, Library, Projects, Sites, Patients, Reports, Support, and KnowledgeBase. Below this, a red header bar displays the project name "(OHRI) REaCT-CHRONO" and a dropdown menu for "Abbotsford Centre". A secondary navigation bar contains tabs for Details, Attributes, Workflows, Staff, Delegation Log, Notes, Statistics, Finances, Patients, and Patient details. The main content area shows a patient profile for "(anonymous)" with fields for "DoB:" and "Gender:". On the left, a sidebar menu lists various patient-related sections, with "Attributes" highlighted by a red box. The main "Attributes" section features a table with columns for "Public", "Attribute", and "Value". The table is currently empty, displaying the message "No attributes have been added". In the top right corner of the attributes section, there is a red-bordered "Add" button with a plus icon, and an "Edit all" link.

Priority Patient Tracking – Navigation / Data Entry

- Select the *Priority Patient* entity
- Click on *Add All* and *Set All As Public*, to complete relevant data

Add Attributes

Entities

(Please select)

(Please select)

Attending Physician

Currently CRP

Data Collection Completed (demo)

Further Screening

Image Tracking

Manitoba

Multiple Gateways

Path Tracking #1

Path Tracking #2

Pathology Request Tracking

Patient appearance

Patient Screening

patient tracker MM

Priority Patient

Regulatory Tracking MM

Remote Access Patient

Remote Access Patient (James Schoales)

Remote Access Patient (JS)

remote Access Patient (LB)

Save Cancel



Add Attributes

Entities

Priority Patient

Attributes

Add	Public	Name	Value
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	AYA Patient? (Age 15-39) <i>(Lookup)</i>	Yes
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Remote Patient? <i>(Lookup)</i>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> RA-1 <input type="checkbox"/> RA-2 <input type="checkbox"/> RA-3 <input type="checkbox"/> Unknown <input type="checkbox"/> (Other)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Satellite Site Name <i>(Lookup)</i>	North York General Hospital
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Type of Satellite Site <i>(Lookup)</i>	<input checked="" type="radio"/> PO-Site <input type="radio"/> C2H-HCP
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Date of Remote Access Initiation <i>(Date)</i>	02/05/2022

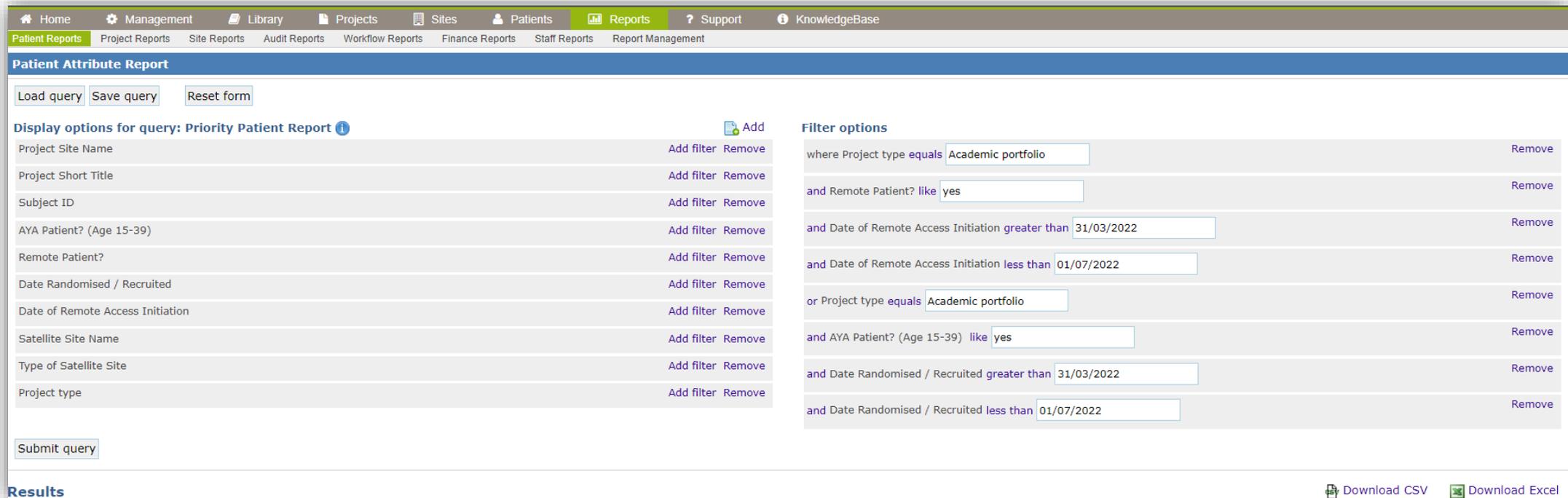
Add All

Set All As Public

Save Cancel

Priority Patient Reporting

- A priority patient report has been created for portal sites
- Date filters are used to limit data to current quarter
- Update the date filters to focus data on quarters being reported
- Run and download report results to MSExcel



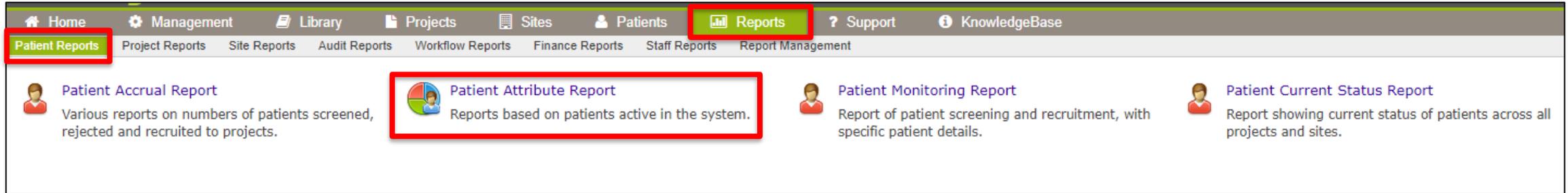
The screenshot displays the 'Patient Attribute Report' interface. The top navigation bar includes Home, Management, Library, Projects, Sites, Patients, Reports (highlighted), Support, and KnowledgeBase. Below this, a sub-navigation bar lists various report types: Patient Reports, Project Reports, Site Reports, Audit Reports, Workflow Reports, Finance Reports, Staff Reports, and Report Management.

The main content area is titled 'Patient Attribute Report' and contains several interactive elements:

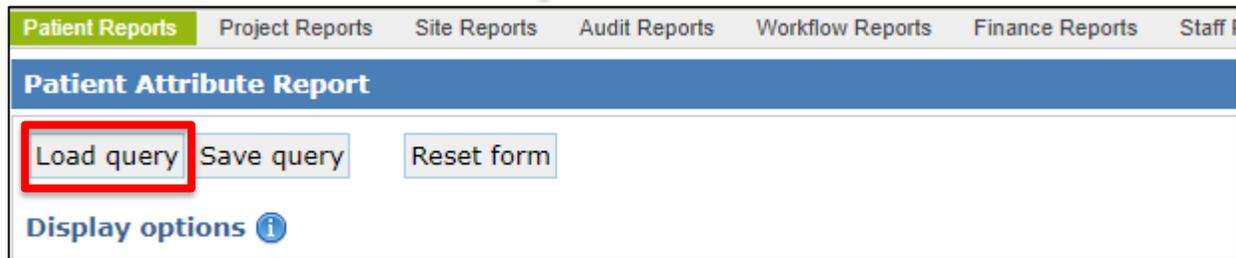
- Buttons for 'Load query', 'Save query', and 'Reset form'.
- A section for 'Display options for query: Priority Patient Report' with an 'Add' button. It lists attributes like Project Site Name, Project Short Title, Subject ID, AYA Patient? (Age 15-39), Remote Patient?, Date Randomised / Recruited, Date of Remote Access Initiation, Satellite Site Name, Type of Satellite Site, and Project type, each with 'Add filter' and 'Remove' options.
- A 'Filter options' section showing a complex query:
 - where Project type equals Academic portfolio
 - and Remote Patient? like yes
 - and Date of Remote Access Initiation greater than 31/03/2022
 - and Date of Remote Access Initiation less than 01/07/2022
 - or Project type equals Academic portfolio
 - and AYA Patient? (Age 15-39) like yes
 - and Date Randomised / Recruited greater than 31/03/2022
 - and Date Randomised / Recruited less than 01/07/2022
- A 'Submit query' button at the bottom left.
- At the bottom right, there are 'Download CSV' and 'Download Excel' buttons.

The 'Results' section is visible at the bottom left but is currently empty.

Priority Patient Report Navigation



The screenshot shows the main navigation menu with the following items: Home, Management, Library, Projects, Sites, Patients, Reports, Support, KnowledgeBase. The 'Reports' menu item is highlighted with a red box. Below the main menu, the 'Patient Reports' sub-menu is expanded, showing: Patient Reports, Project Reports, Site Reports, Audit Reports, Workflow Reports, Finance Reports, Staff Reports, Report Management. The 'Patient Reports' sub-menu item is also highlighted with a red box. Below the sub-menu, four report cards are displayed: Patient Accrual Report, Patient Attribute Report, Patient Monitoring Report, and Patient Current Status Report. The 'Patient Attribute Report' card is highlighted with a red box.



The screenshot shows the 'Patient Attribute Report' page. The 'Patient Reports' sub-menu is highlighted with a green bar. Below the sub-menu, the 'Patient Attribute Report' title is displayed. Below the title, there are three buttons: 'Load query', 'Save query', and 'Reset form'. The 'Load query' button is highlighted with a red box. Below the buttons, there is a 'Display options' link with an information icon.



The screenshot shows the 'Load query' dialog box. The dialog box has a title bar with 'Load query' and a close button. Below the title bar, there is a search bar with 'Public' and 'Query' entered. Below the search bar, there is a list of queries. The first query is 'Priority Patient Recruitment Report', which is highlighted with a red box. To the left of the query name is a green checkmark, and to the right is a 'Delete' button.

Priority Patient Report Generation

Patient Attribute Report

Load query Save query Reset form

Display options for query: Priority Patient Recruitment Report Add

Project Site Name	Add filter Remove
Project Short Title	Add filter Remove
Subject ID	Add filter Remove
AYA Patient? (Age 15-39)	Add filter Remove
Remote Patient?	Add filter Remove
Date Randomised / Recruited	Add filter Remove
Date of Remote Access Initiation	Add filter Remove
Satellite Site Name	Add filter Remove
Type of Satellite Site	Add filter Remove
Project type	Add filter Remove

Filter options

where Project type equals <input type="text" value="Academic portfolio"/>	Remove
and Remote Patient? like <input type="text" value="yes"/>	Remove
and Date of Remote Access Initiation greater than <input type="text" value="31/03/2022"/>	Remove
and Date of Remote Access Initiation less than <input type="text" value="01/07/2022"/>	Remove
or Project type equals <input type="text" value="Academic portfolio"/>	Remove
and AYA Patient? (Age 15-39) like <input type="text" value="yes"/>	Remove
and Date Randomised / Recruited greater than <input type="text" value="31/03/2022"/>	Remove
and Date Randomised / Recruited less than <input type="text" value="01/07/2022"/>	Remove

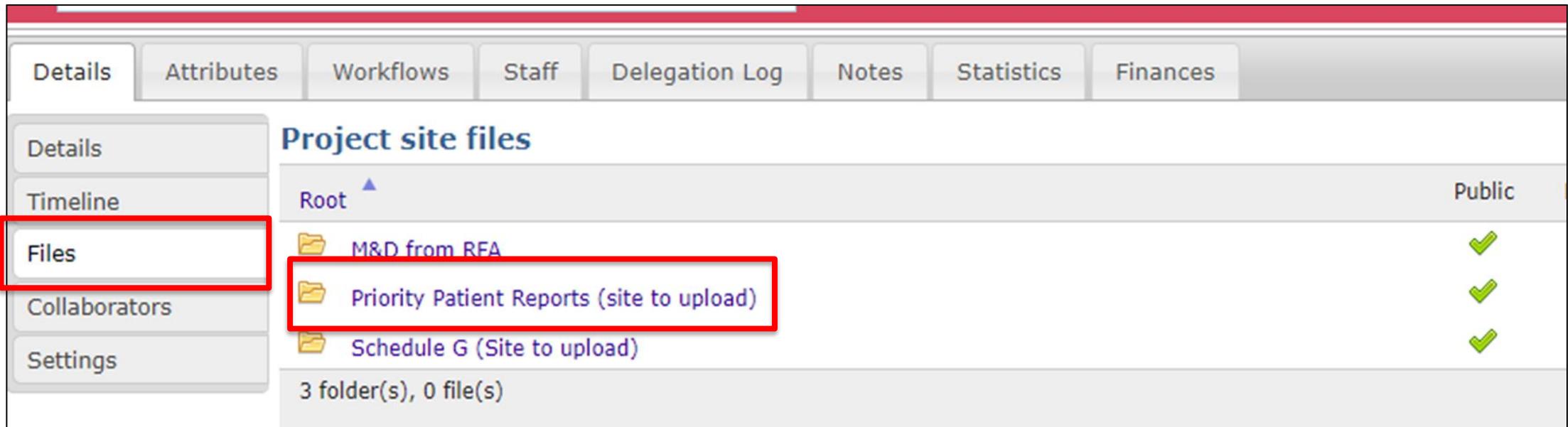
Submit query

Results

Download CSV Download Excel

3CTN Priority Patient Reporting

- Under Project Site level for the *3CTN Reporting Y9 for Adult Sites*, or *3CTN Reporting Y9 for Ped Sites* project, as applicable
- Upload your Priority Patient file to the *Priority Patient Reports (site to upload)* folder using *Add file*



Details	Attributes	Workflows	Staff	Delegation Log	Notes	Statistics	Finances
Details	Project site files						
Timeline	Root ▲						
Files	M&D from RFA						Public ✓
Collaborators	Priority Patient Reports (site to upload)						✓
Settings	Schedule G (Site to upload)						✓
3 folder(s), 0 file(s)							



Adding a Project to your Organization in EDGE

- Search global projects for your desired trial
- If found, click on **request involvement**
- If not found,
 - For portal users, complete the 3CTN Portfolio application form and submit to info@3CTN.ca
 - For current EDGE site, use the “online 3CTN Portfolio application” project attributes
- Once you have added or have been granted access to the project, you will then need to add your staff and project site to the project.

Adding a Site to a Project

After receiving access to the trial and being added as a staff at the project level you will need to add your project site.

Steps

- Go to the project level (green banner) of desired trial
- Click on the “**Sites**” tab from the left navigation bar
- Click “**Add Project Site**”
- Choose your site from the “**Select Site**” window
- Fill in relevant data and click “**Save**”

Note: To be able to add a site, your organization needs to be involved in the trial and you need to be added as staff to the trial with “**Manage**” access.

Project Site Detail Page

Project site details

[View audit](#) [Transfer ownership](#)

Details

[Edit](#) [Swap Site](#)

Owned by:	Canadian Cancer Clinical Trials Network (3CTN)
Site (Parent):	Abbotsford Centre (BC Cancer)
Status (Status date):	Open to recruitment (10/06/2021)
Type:	Recruiting Site Only
Project Site Number:	
Qualified Investigator:	Abele, Jonathan
Site target recruitment:	10
Patient data collection plan:	Canada
Patient identifier type:	Local Number

Approvals

[Edit](#)

Approval process:	REB Approval
REB Submission Date:	02/06/2021
Date of REB Approval:	08/06/2021
SSI date:	

Milestones

[Edit](#)

SIV date:	
Open to recruitment:	10/06/2021
Recruitment end date (Planned):	
Recruitment end date (Actual):	
Planned completion date:	
Completion date:	

Key staff

No key staff have been identified for this project site

Project Site Detail Page – Details Section

- Edit** - For most sections on the project site details page there will be an “Edit” button located to the right of the section header.
 - If you do not see the “Edit” button, please make sure that you have “Manage” access to this project site under the Staff Tab.
 - If you have “Manage” access but still don’t see the “Edit” button, please make sure the project site is “Owned by” your organization.
- Status (Status Date)** – Your sites status for the project e.g., Open to Recruitment . Note you will need to enter a status date.
- Site target recruitment** – This is your site’s expected recruitment over the lifespan of the project. This is set at the beginning of the trial initiation process. Note: this target shouldn’t change.

Project site details

Details		View audit Transfer ownership	
		1 Edit Swap Site	
Owned by:	Canadian Cancer Clinical Trials Network (3CTN)		
Site (Parent):	Abbotsford Centre (BC Cancer)		
Status (Status date):	Open to recruitment (10/06/2021)	2	←
Type:	Recruiting Site Only		
Project Site Number:			
Qualified Investigator:	Abele, Jonathan		
Site target recruitment:	10	3	←
Patient data collection plan:	Canada		
Patient identifier type:	Local Number		

Project Site Detail Page

Project site details

[View audit](#) [Transfer ownership](#)
[Edit](#) [Swap Site](#)

Details

Owned by: Canadian Cancer Clinical Trials Network (3CTN)
Site (Parent): Abbotsford Centre (BC Cancer)
Status (Status date): Open to recruitment (10/06/2021)
Type: Recruiting Site Only
Project Site Number:
Qualified Investigator: [Abele, Jonathan](#)
Site target recruitment: 10
Patient data collection plan: Canada
Patient identifier type: Local Number

Approvals

[Edit](#)

Approval process: REB Approval
REB Submission Date: 02/06/2021
Date of REB Approval: 08/06/2021
SSI date:

Milestones

[Edit](#)

SIV date:
Open to recruitment: 10/06/2021
Recruitment end date (Planned):
Recruitment end date (Actual):
Planned completion date:
Completion date:

Key staff

No key staff have been identified for this project site

Project Site Detail Page – Approvals Section

By default, the “Approvals” section will only show REB and SSI dates. You will need to change the “Approval process” from “REB Approval” to “Site Activation”.

Approvals		 Edit
Approval process:	REB Approval	
REB Submission Date:	02/06/2021	
Date of REB Approval:	08/06/2021	
SSI date:		

Edit Project Site Approvals ✕

Approval Process
The approval process for this Project Site

REB Approval ▼ i

(Undefined)

REB Approval i

Site Activation i

REB Submission Date
The date of submission

Date of REB Approval
The date approval letter received

08/06/2021 i

SSI date
The date of valid site-specific information form submission

Save Cancel

Project Site Detail Page – Approvals Section

You will now be able to add the “Start Date of Site Activation Process” in the “Date site confirmed participation” data field.

You will also add your site’s REB submission and approval dates in this section.

Note: REB dates are the initial submission and approval dates.

Edit Project Site Approvals ✕

Approval Process
The approval process for this Project Site Site Activation ▾ ⓘ

REB Submission Date
The date of submission 02/06/2021 ⓘ

Date of REB Approval
The date approval letter received 08/06/2021 ⓘ

SSI date
The date of valid site-specific information form submission ⓘ

Capacity & capability assessment required? (Undefined) ▾ ⓘ

Date site invited by sponsor ⓘ

Date site selected by sponsor ⓘ

Date site confirmed by sponsor ⓘ

Date site confirmed participation 01/06/2021 ⓘ

Non confirmation status (Undefined) ▾ ⓘ

Date of non confirmation ⓘ

Save Cancel



Project Site Detail Page

Project site details

[View audit](#) [Transfer ownership](#)

Details		Edit	Swap Site
Owned by:	Canadian Cancer Clinical Trials Network (3CTN)		
Site (Parent):	Abbotsford Centre (BC Cancer)		
Status (Status date):	Open to recruitment (10/06/2021)		
Type:	Recruiting Site Only		
Project Site Number:			
Qualified Investigator:	Abele, Jonathan		
Site target recruitment:	10		
Patient data collection plan:	Canada		
Patient identifier type:	Local Number		

Approvals		Edit
Approval process:	Site Activation	
REB Submission Date:	02/06/2021	
Date of REB Approval:	08/06/2021	
SSI date:		
Capacity & capability assessment required?:		
Date site invited by sponsor:		
Date site selected by sponsor:		
Date site confirmed by sponsor:		
Date site confirmed participation:	01/06/2021	
Non confirmation status:		
Date of non confirmation:		

Milestones		Edit
SIV date:		
Open to recruitment:	10/06/2021	
Recruitment end date (Planned):		
Recruitment end date (Actual):		
Planned completion date:		
Completion date:		

Project Site Detail Page – Milestones Section

1. **Edit** – Clicking “Edit” will open a dialogue box that will enable you to update or add information.
2. **Open to recruitment** – The date your site is initially authorized to open to recruitment (dd/mm/yyyy)
3. **Recruitment end date** – The date your site is closed to recruitment. (dd/mm/yyyy)

Milestones		 1 
SIV date:		
Open to recruitment:	10/06/2021	2 
Recruitment end date (Planned):		
Recruitment end date (Actual):		3 
Planned completion date:		
Completion date:		

3CTN Quarterly Report Confirmation

- Once you have completed adding/updating recruitment, priority patient and trial activation data you will need to let 3CTN know by completing a project site attribute.
- Note: This is also where you will be tracking completion of M&Ds and Schedule G reporting in Q2 and Q4

3CTN Reporting Y9 for Adult Sites

Details | Attributes | Workflows | Staff | Delegation Log | Notes | Statistics | Finances

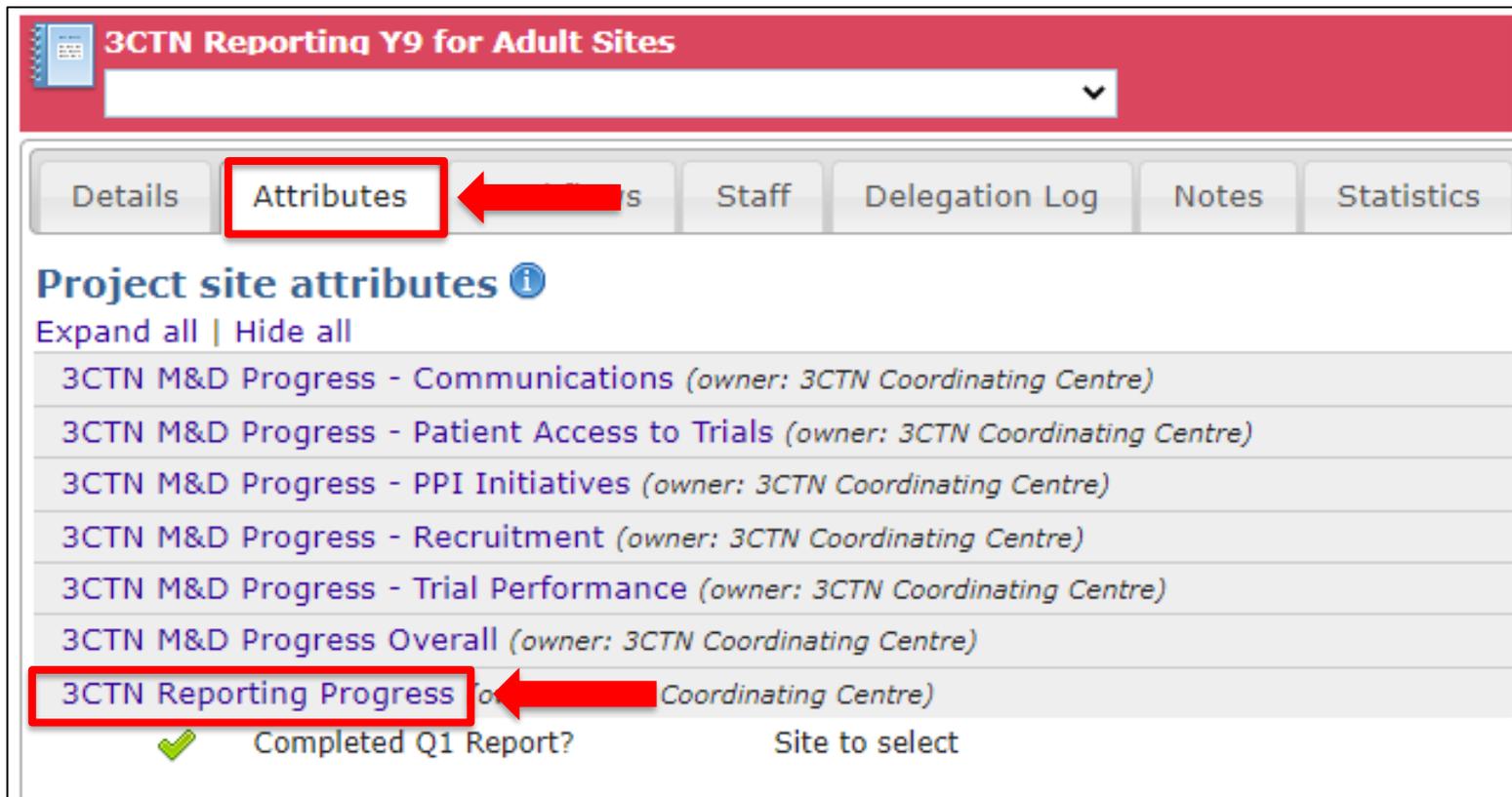
Project site attributes  

Expand all | Hide all

3CTN M&D Progress - Communications (owner: 3CTN Coordinating Centre)	Edit all
3CTN M&D Progress - Patient Access to Trials (owner: 3CTN Coordinating Centre)	Edit all
3CTN M&D Progress - PPI Initiatives (owner: 3CTN Coordinating Centre)	Edit all
3CTN M&D Progress - Recruitment (owner: 3CTN Coordinating Centre)	Edit all
3CTN M&D Progress - Trial Performance (owner: 3CTN Coordinating Centre)	Edit all
3CTN M&D Progress Overall (owner: 3CTN Coordinating Centre)	Edit all
3CTN Reporting Progress (owner: 3CTN Coordinating Centre)	Edit all
 Completed Q1 Report? Site to select 	Edit Delete Audit

3CTN Quarterly Report Confirmation Navigation

- Go to your project site level (red banner) of either the *3CTN Reporting Y9 for Adult Sites* or *3CTN Reporting Y9 for Ped Sites*
- From there, click on the attributes tab, then click on “3CTN Reporting Progress” to show reporting attributes



The screenshot shows the '3CTN Reporting Y9 for Adult Sites' interface. At the top, there is a red banner with the title and a dropdown menu. Below the banner is a navigation bar with tabs: 'Details', 'Attributes', 'Staff', 'Delegation Log', 'Notes', and 'Statistics'. The 'Attributes' tab is highlighted with a red box and a red arrow pointing to it. Below the navigation bar, the 'Project site attributes' section is displayed, with 'Expand all | Hide all' options. A list of attributes follows, including '3CTN M&D Progress - Communications', '3CTN M&D Progress - Patient Access to Trials', '3CTN M&D Progress - PPI Initiatives', '3CTN M&D Progress - Recruitment', '3CTN M&D Progress - Trial Performance', '3CTN M&D Progress Overall', and '3CTN Reporting Progress'. The '3CTN Reporting Progress' attribute is highlighted with a red box and a red arrow pointing to it. Below this attribute, there is a green checkmark, the text 'Completed Q1 Report?', and 'Site to select'.

3CTN Quarterly Report Confirmation Navigation

- Next click on the Edit button to the far right of the “Completed Q1 Report?”

3CTN Reporting Progress (owner: 3CTN Coordinating Centre)

✓ Completed Q1 Report? Site to select

Edit all

Edit Delete Audit

- A dialogue box will pop up with a list of options that can be checked.
- Please select the relevant options to let us know if you have completed each part of the reporting process. If there are no updates, select the option with NA.
- Once done click save.

Edit Attribute ✕

Attributes

Public	Name	Value
<input checked="" type="checkbox"/>	Completed Q1 Report?	<input type="checkbox"/> Site to select <input checked="" type="checkbox"/> Patient recruitment updated <input type="checkbox"/> Patient recruitment NA <input checked="" type="checkbox"/> Trial performance key dates updated <input type="checkbox"/> Trial performance key dates NA <input type="checkbox"/> AYA and remote access patient file uploaded <input checked="" type="checkbox"/> AYA and remote access patient file NA

Example: *AYA and Remote Patient file NA* was checked to indicate no priority patients were recruited this quarter.

Save Cancel