InForm Training Exercises for Investigators

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Exercise 1 - Logging on

Steps:
Log in to the InForm Training database, by going to: http://www.ctc.usyd.edu.au/our-research/clinical-trials/trials-data-systems.aspx, then scroll to the bottom of the dropdown list and select ‘Training’, then select ‘InForm generic training system’.

The InForm Login Screen will be displayed.
1. Enter your User Name: (provided via email from the Coordinating Centre)
2. Enter your Password: (provided via email from the Coordinating Centre).
3. Click Log In

A warning will tell you that your password has expired, and the Change Password Options will be displayed.
4. Enter data as follows:
   - **User Name**: this field will be automatically completed – it will contain your username (provided via email from the Coordinating Centre)
   - **Old Password**: enter your password (provided via email from the Coordinating Centre)
   - **New Password**: enter a new password that you have chosen yourself - – you will need to remember this password for all future logins
   - **Confirm Password**: enter again the new password that you have chosen yourself
   - **Email Address**: enter your own personal email address – this will be used to send you a temporary password if you forget your password later
   - **Question**: enter a question that only you will know the answer to, e.g. Mother’s maiden name
   - **Response**: enter the answer to the question – please be very careful: if you ever forget your password, you will need to enter this response exactly as it is typed, including capitals/lower case/punctuation etc.

5. Click Submit

The InForm trial home page will be displayed
Exercise 2 - Navigating in InForm

In this exercise, you will learn some InForm buttons that can be used for navigation.

1. In the navigation bar on the left of the screen, click to display the list of Patient Case Books.
2. From the ‘Case Books for Site:’ dropdown list, choose site ‘99901 – Training Site 1 99901’.
3. In the Case Book list, click the patient number and initials for the first patient in the list: 001 (AAA).

![Image of InForm interface with patient information]

You will see the Time and Events Schedule for the patient.

4. Click on the traffic light for the PTDATA eCRF in the BASE event.

![Image of InForm interface with patient data entry]

You will see this eCRF.

5. Click to get ‘back’ to the previous screen. This will take you ‘back’ to the Time and Events Schedule.
6. Again, click on the traffic light for the PTDATA form in the BASE event.

7. This time, click the yellow arrow to go ‘up’ one level (i.e. to a lesser level of detail).

This will take you ‘up’ to the Time and Event Schedule.

8. Click ‘Home’ to navigate to the study home screen.

This will take you back to the study home screen where you started.

9. Alternately, click Patients from any screen to display the list of Patient Case Books again.
Exercise 3 - Signing an eCRF

Note: A very small amount of data has been entered for your training patient to allow signature of an eCRF and an eCRB. All eCRFs in this training study have intentionally been kept short and generic. In a real study database, considerably more data would normally be collected.

Note: These electronic signature exercises must only be performed using the training patient assigned to you in the email with your training logon.

The DTH eCRF requires an electronic signature.

1. In the navigation bar on the left of the screen, click Patients to display the list of Patient Case Books.
2. From the ‘Case Books for Site:’ dropdown list, choose the site listed in the email with your training logon.
3. In the Case Book list, for the patient listed in the email with your training logon, click on the traffic light for the FUP visit.
4. Select the Follow up visit with date 11-Mar-2013 (using the visit selector at the bottom left of the screen).
5. Click on the DTH eCRF.
   The Sign button will be visible at the bottom left of the screen.
6. Click Sign.

The Electronic Signature Affidavit opens at the bottom of the screen.
The eCRF stays open at the top of the window, so you can scroll up and down to review the data before signing the eCRF.

7. To sign the eCRF, read the Electronic Signature Affidavit and enter your username and password.
8. Click Submit.
You will see this popup notification

9. Click **OK**

InForm records the username, and the date that the eCRF was signed.

*If the signature information does not display due to a refresh error, click away from the eCRF (onto another eCRF) and then back again.*
Exercise 4 - Signing a Case Record Book

1. Click on the SIGN visit in the visit ribbon (at the top of the screen).

Because the 2 items on the Sign CRF have been completed, the Sign Book button will be visible at the bottom left of the screen.

Completing these items indicates that you have verified all eCRFs are completed and all data is clean for this patient. This is recorded in the database as a precursor to being able to sign the eCRB.

2. Click Sign Book

The Electronic Signature Affidavit is then displayed at the bottom of the screen.

3. Read the Electronic Signature Affidavit then enter your password to sign the case book.

*Note: If you have already performed a signature in this InForm session, your username will already be entered for you. If you had not already performed a signature in this InForm session, you would need to enter both your username and password.*

4. Click Submit

You will see this popup notification

5. Click OK

InForm records the username, and the date that the eCRB was signed. *If the signature information does not display due to a refresh error, click away from the eCRF (onto another eCRF) and then back again.*
**Using the “Signatures” Screen**

You can also view the status of signatures and sign from the Signature screen

6. Click **Signatures**

   The Required Signature screen will appear.

7. Note the signature icons indicating that the eCRF and eCRB for your patient have been signed.
   (If there is a long list, use the filters at the top of the screen to choose your site and patient)

   If your patient had not already been fully signed, you would click on the **Sign Book** or **Sign** links to sign the eCRB/eCRFs. But because you have already signed for your training patient, we will not do this. **PLEASE DO NOT SIGN ANYONE ELSE’S TRAINING PATIENT!**

8. Now that you have completed the electronic signature exercises, reply to the email in which you received your training username and password, stating that you have completed the Exercises.

   *Your electronic signatures will be checked by the CTC, and accreditation will be given subject to satisfactory completion.*
Exercise 5 - Online Help

CRF and Item Help

Some items, sections and forms are programmed with specific help text. These will be underlined to indicate that help text is available.

1. Click **Patients** in the navigation bar.

2. Click the traffic light for the RAND visit for your patient

3. On the SCR&ENROL DETAILS eCRF, click on the underlined question text for item 8 to view the help text for that item.
InForm Help Menus

1. Click Help then ‘InForm and Trial Reporting’ to access InForm Help menus

This is standard help on the InForm software and is NOT study specific, but it may be of interest.
View the Study Protocol and Study Documents

1. Click [Home] in the navigation bar
2. The Study Home Page contains hyperlinks to the Study Protocol and any other useful documents.
   This training study home page contains a link to the training Exercises document for Site Data Managers.

To return to the Home Page after opening a document, click [Home] again.
Exercise 6 – Changing Your Password

You can change your password at any time you are logged in to the system. InForm will request you to change your password periodically, for security reasons. You cannot reuse old passwords.

1. From any screen, click on your name.

2. Change your password by completing the change password eCRF

3. Click Submit.
Exercise 7 - Logging Out

1. When you have finished your InForm session logout of InForm by pressing **Logout**.

   ![InForm Training](image)

   You will see this popup notification

2. Confirm you wish to exit InForm by pressing **OK**

   ![Windows Internet Explorer](image)

   If you have any unsaved data, InForm will prompt you to save before exiting.