Local Portfolio Management System (LPMS) Overview

What is an LPMS?

The Local Portfolio Management System (LPMS) is used to manage both National Institute for Health Research (NIHR) Portfolio studies and non-NIHR Portfolio studies. The system is also often referred to as ReDA (Research Database Application).

Each Clinical Research Network (CRN) has a separate LPMS that manages studies throughout the various study phases including feasibility, permissions, recruitment etc.

Overview

The system is designed to allow research staff with different roles and based at either The Newcastle Upon Tyne Hospitals NHS Foundation Trust or Newcastle University to access, read and update any study that they are participating in. The secure and flexible administration system has been designed to ensure users can only access and update approved studies and the web-based system makes it possible to capture data at any time from any location (with an Internet connection) giving study teams the ability to update studies quickly and efficiently.

Access

To gain access to the system you will need a username and password. These will be provided by your trust's LPMS administrators please email nuth.research.informatics@nhs.net or if you forget your password, your administrator will be able to reset it for you.

You can access the system at http://nenc.reda.org.uk

LPMS Recruitment Upload

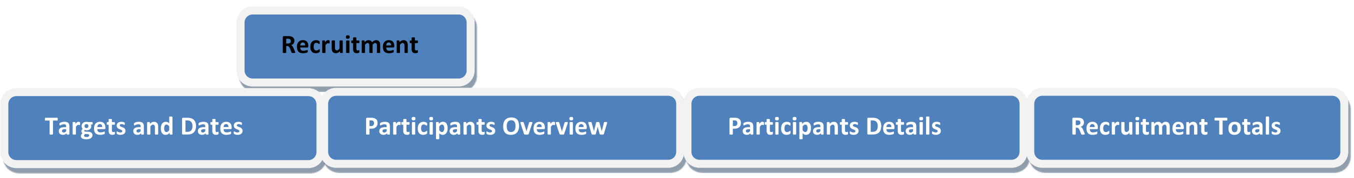
Contents:

LPMS Access

The system can be accessed from the internet at https://nenc.reda.org.uk if you haven't been given a username or password, please get in touch with nuth.research.informatics@nhs.net

Recruitment Tab

To enable recruitment/accruals to be added to individual studies you will always have to enter information/data into the recruitment tab.



Within this tab there are 7 sub tabs. Only use the 4 shown in the above figure:

Targets and Dates
Please do not enter details into any area of Targets and Dates unless asked to enter details into the **Recruitment Delays** area.

- *With the new way of uploading recruitment, you do not have to enter the date of the first patient it is uploaded automatically*

Participants Overview
All recruitment/Accruals will be entered from this tab either individually or by importing bulk participants.

Participants Details

Overview of participant information including ID, participant type, referral date, year of birth etc.

Recruitment Totals

The totals for Recruitment recorded as participant level data can be seen by selecting the required type from the 'Participant Aggregated Data' section of the 'Recruitment Type' drop-down list.

The 'Recruitment Totals' page shows three tables of data (image below). Within each table each row represents a year with columns representing months and the right-hand column showing the yearly total

The lower table shows **Site** monthly and yearly totals for the selected 'Recruitment Type' (see previous section)

The middle table shows **Trust** monthly and yearly totals for the selected 'Recruitment Type' (see previous section) – *Note: If the Trust has multiple participating sites, the totals shown will be the sum of all Trust sites.*

The upper table shows **Study** monthly and yearly totals across all Northeast & North Cumbria participating sites for the selected 'Recruitment Type' (see previous section)**.**

Custom Recruitment - Event - Enrolled

Recruitment Type: Event - Enrolled ◉**Financial Year** ○**Calendar Year**

Study Total: **5**

Financial Year	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total Year
2021/22												1	**1**
2022/23		3	1										**4**

Trust Total: **5**

Financial Year	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total Year
2021/22												1	**1**
2022/23		3	1										**4**

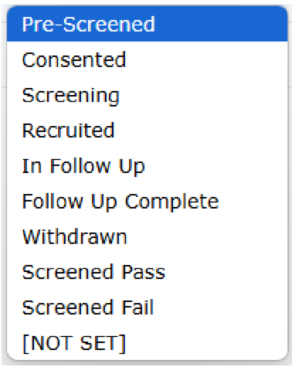
Site Total: **5** | Site Target: **5**

Financial Year	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total Year
2021/22												1	**1**
2022/23		3	1										**4**

Recruitment Upload

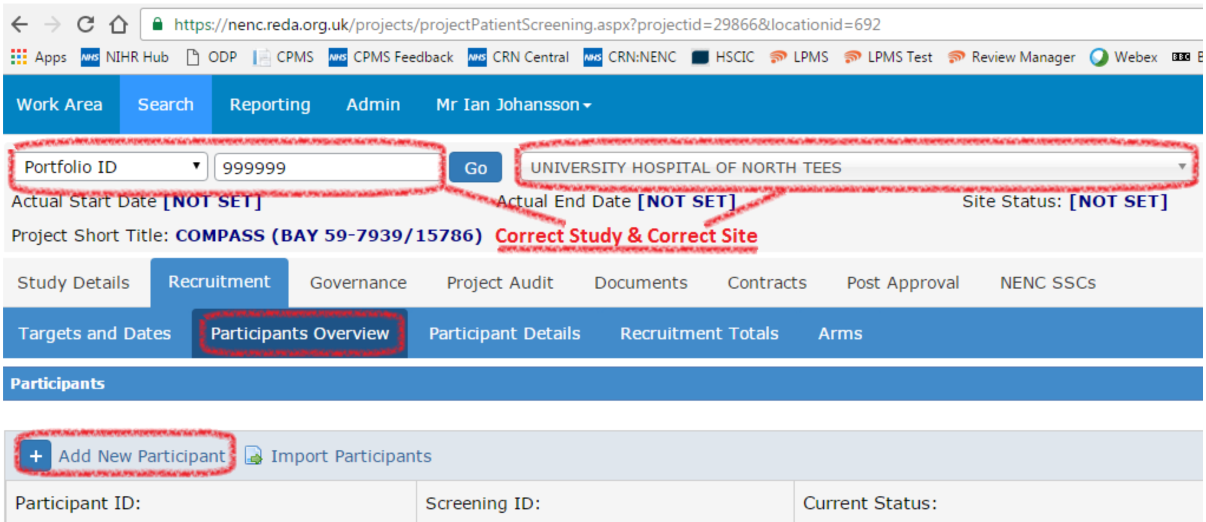
Recruitment data at a Participant level is recorded using the '**Participants Overview**'.

The system has been designed to allow for the recording of a participant's journey through each of the different recruitment phases. Each phase can be recorded as a 'Status' (image right) with the 'Screening', 'Recruited' and 'Withdrawn' statuses having extra information added as an 'Event' if required e.g. Status: 'Screening', Event: 'Patient Eligible' or 'Patient Ineligible'.



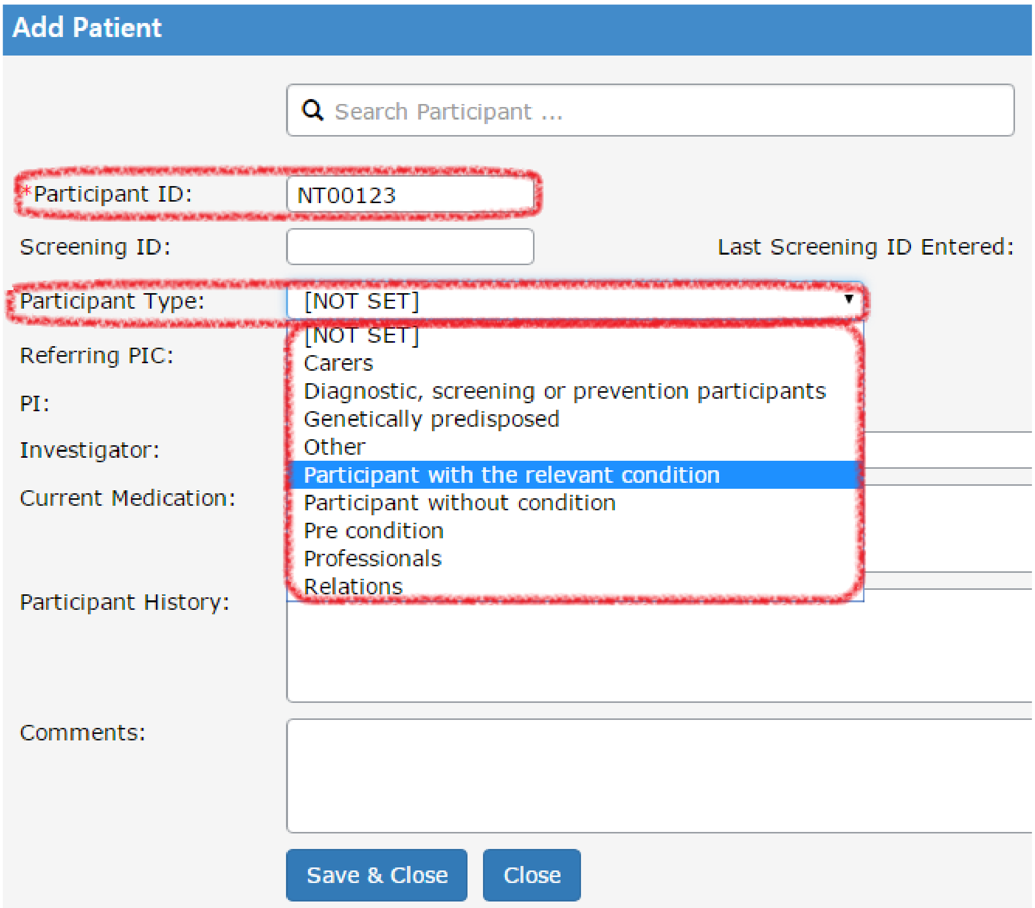
Recording Recruitment

- Ensure the correct study and Location (Site) are selected (image below)
- Select the 'Participants Overview' page



Select ‘Add New Participant’ to show the ‘Add Patient’ page (image below)

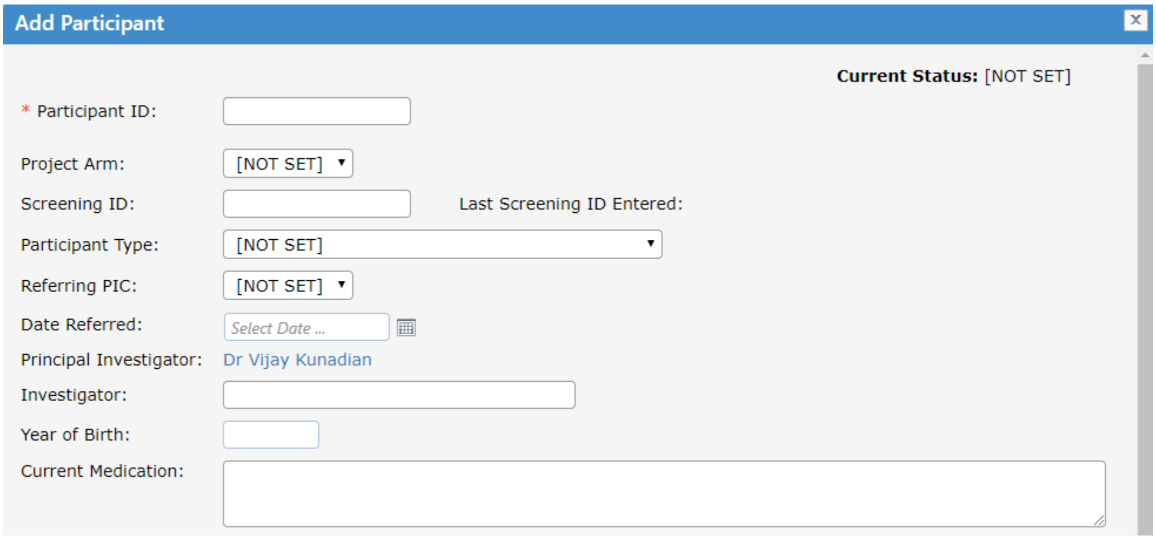
Enter the ‘Participant ID’ – This should either replicate the Participant ID used by the Study team or another of your choice.



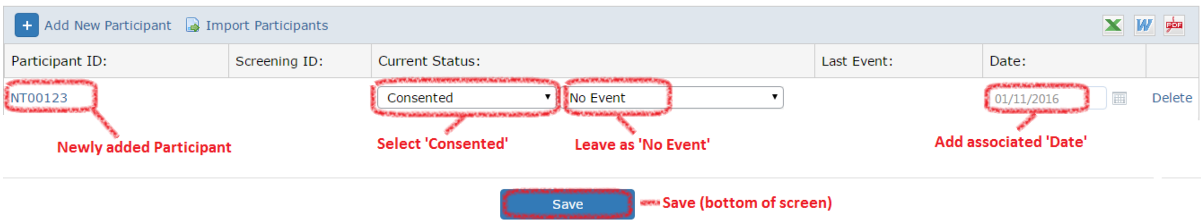
- Select a ‘Participant Type’ from the Participant Type drop-down list. This should replicate the Participant Type as used by the Study team.

- Enter the Year of Birth of the participant

- The remaining fields can be updated as per requirements, but it must be emphasised that **no patient identifiable data is to be recorded.**



- Select ‘Save & Close’ to return to the ‘Participants Overview’ page where the newly added Participant will be visible in the Participants table (image above).



- The newly added Participant should now be given a status of ‘Consented’ which can be selected from the ‘Current Status’ drop-down list (image above).

- Leave the ‘Event’ set as ‘No Event’

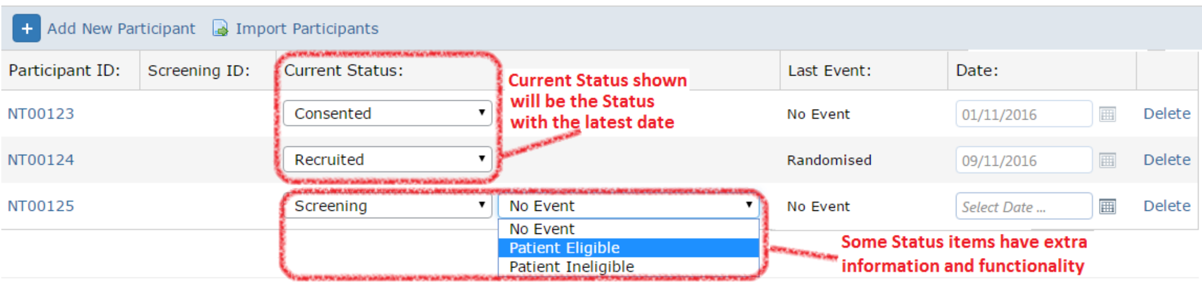
- Add an associated ‘Date’. - Note: The associated ‘Date’ must be the same date as that recorded in CPMS by the study team and, depending upon how a study team records participant activity, this may not be the actual consent date. The status of ‘Consented’ is an indication that a participant has consented, and it provides a consistent status for reporting participant totals in LPMS.

- Select ‘Save’ – be aware that the ‘Save’ button appears at the bottom of the page and may not be immediately obvious.

Changing status from 'Consented' to 'Recruited'
Depending upon study requirements, it may also be necessary to record a 'Screening' and/or 'Recruited' status.

Assuming a participant already has a status of 'Consented', to add another status to a participant (image below):

- Select the 'Current Status' drop-down list and choose the required status.
- If the status 'Screening' is chosen, select either 'Patient Eligible' or 'Patient' Ineligible' from the 'Event' drop-down list
- If the status 'Recruited' is chosen, select either 'Enrolled' or 'Randomised' from the 'Event' drop-down list
- Add an associated 'Date'
- Select 'Save'



- After saving, the 'Current Status' shown will be the status with the latest date (image below). To see the details of other statuses held by the participant, select the 'Participant ID' to show the 'Participant Details' page (see section below).

Recruitment Upload Import Excel (Portfolio Studies Only)

An excel file can be used to import multiple accruals into the LPMS. Blank copies can be supplied by the information team nuth.njro.informatics@nhs.net

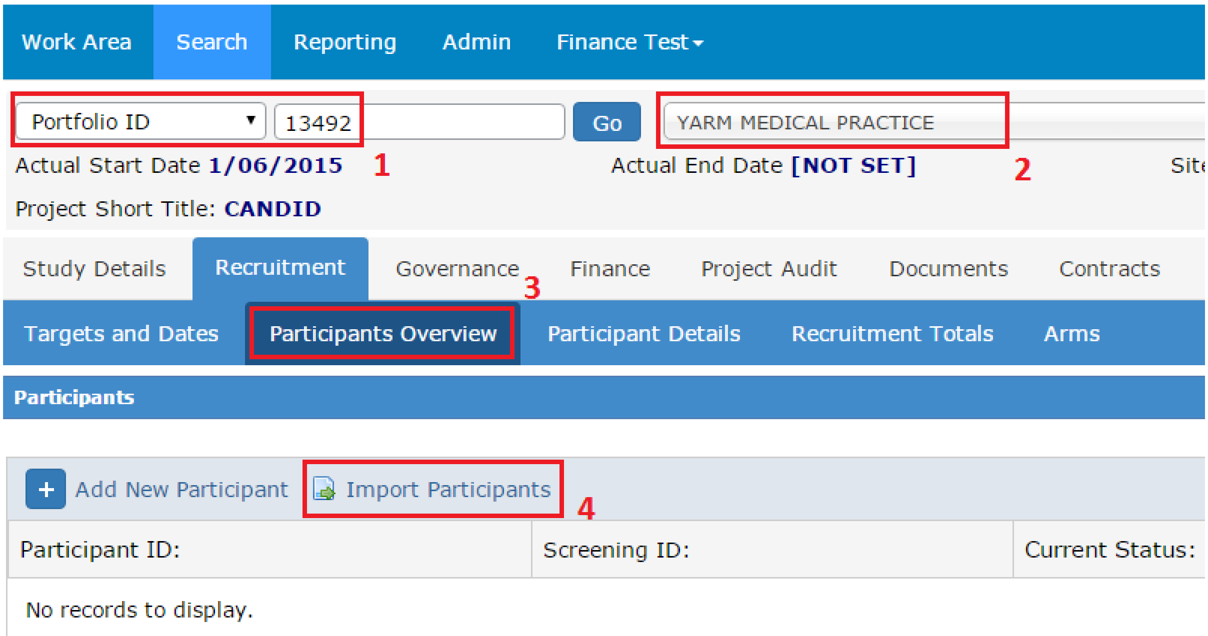
The spreadsheet should have the following headings:

- **Study identifier:** This is the Portfolio ID found on the Project Information page.
- **Study Acronym: -** The Short Title found on the Project Information page.
- **Investigator Name:** Name of PI found on Stakeholders page (not a mandatory field).
- **Site Identifier:** The site ODS code. This field does not need to be completed if the Site Name is populated.
- **Site Name:** Name of the site found at the top of the page or in the Locations section.
- **Activity Date:** Date when the participant was **Consented, Screened or Recruited.**
- **Participant type:** Dropdown i.e. Participant with the relevant condition.
- **Unique Participant ID:** Each participant should have their own participant ID.
- **Participant Event Status:** Consented, Screen Pass/Fail or Recruited
- **Year of Birth:** Each participant recruited needs to have their Year of Birth recorded

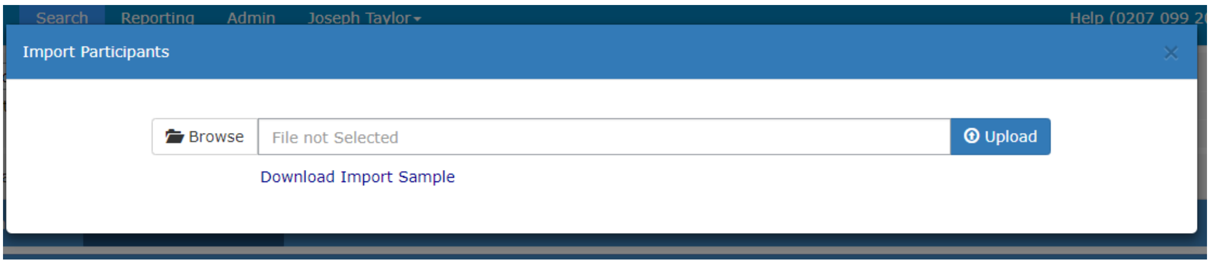
Activity Type, **Selected Arm** and **Date Added to Arm** do not need to be completed (See below)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Study Identifier	Study Acronym	Investigator Name	Site Identifier	Site Name	Activity Date	Participant Type	Unique Participant Id	Participant Event Status	Year Of Birth	Activity Type	Selected Arm	Date Added to Arm
2	32352	Knee Replacement (KReBS)			FREEMAN HOSPITAL	23/08/2017	Participant with the relevant condi	NUTH01	Consented	1989			
3	32352	Knee Replacement (KReBS)		RTD01	FREEMAN HOSPITAL	24/08/2017	Participant with the relevant condi	NUTH02	Consented	1978			
4	32352	Knee Replacement (KReBS)			FREEMAN HOSPITAL	25/08/2017	Participant with the relevant condi	NUTH03	Recruited	1981			
5	32352	Knee Replacement (KReBS)		RTD02		23/08/2017	Participant with the relevant condi	RVI01	Consented	1989			
6	32352	Knee Replacement (KReBS)		RTD02		23/08/2017	Participant with the relevant condi	RVI01	Recruited	1989	This row will not import as duplicate Participant ID		
7	32352	Knee Replacement (KReBS)		RTD02		24/08/2017	Participant with the relevant condi	RVI02	Screened Fail				
8	32352	Knee Replacement (KReBS)		RTD02		25/08/2017	Participant with the relevant condi	RVI03	Screened Fail				
	Required	Required	Optional	Site Identifier and\or Site Name Required		Required	Required	Required	Required	Required (where data is available/applicable)	Optional	Optional	Optional

After clicking Import Participants, click Download Import Sample, which will bring up a template spreadsheet to be used for importing participants



- Click the 'Download Import Sample' to download spread sheet (example in appendices). You will have already populated your spreadsheet and saved it on your computer.



Upload the Template file

- Select 'Browse' and choose the appropriate import template
- Select 'Upload' to upload the data in the file.

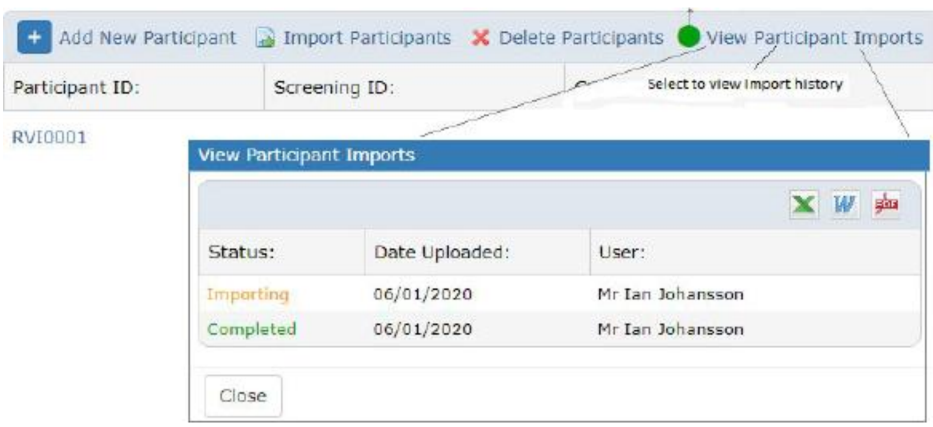
- Review the uploaded data and, if necessary, resolve rows that don't have a green tick. This usually involves amending the import template and re-uploading it:

- Select 'Overwrite Existing Participants (full import) '. Note: The wording of this option is misleading. This option imports all new data, overwriting where necessary, and does not remove any existing data.

- Select 'Import and Close' (you will have to scroll to the bottom of the participant list to see this option) and respond 'Yes' to the confirmation message. After a short pause, the Import page will close

Importing the data

- Uploaded data will now be imported and processed via the database server freeing up LPMS so you can continue using it.



- The user can now continue to use the system as desired, returning to the study to view the import status as required.

- The status of the import process on the server will be indicated by the coloured indicator next to the 'View Participant Imports' option (see image above), Green indicates the import process has completed successfully, orange indicates the import is still in progress and red indicates the import process has completed but with errors (usually requiring a repeat of the import)

- Information on all Participant imports for a study can be seen by selecting the 'View Participant Imports' option to display a table showing details of each import (image above)

LPMS Recruitment Flowchart

Adding a Consent Date

On the 'Participants Overview' page, click 'Add New Participant'

Add a 'Participant ID' and select a 'Participant Type'

The 'Participant Type' will generally be 'Participant with the relevant condition'

Click 'Save & Close'

Change the 'Current Status' to 'Consented' & add a consent date

Click the Save button at the bottom of the screen

Adding a Screening Date

Change the Participant's 'Current Status' to 'Screen Pass or Screen Fail'

↓

An adjacent box will appear that says 'No event' - change this to either 'Patient Eligible' or 'Patient Ineligible'

↓

Add the date that the patient passed/failed screening

↓

Click the Save button at the bottom of the screen

Adding a Recruited Date

Change the Participant's 'Current Status' to 'Recruited'

↓

An adjacent box will appear that says 'No event' - change this to either 'Enrolled' or 'Randomised'

Use the 'Enrolled' option if the study does not involve randomisation

↓

Add the date that the patient was enrolled/randomised

↓

Click the Save button at the bottom of the screen

Further Info:

- The consent and recruited dates need to be listed on LPMS otherwise the patient may not be counted in official recruitment figures.
- In addition, we would strongly advise users to add 'screening' dates, as these will show the number of screen fails.
- If your study does not require patient consent, then it is best to add the closest approximate date (e.g. date of first entry into the study).