



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 <u>nuth.research.informatics@nhs.net</u> 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 and Recruitment Upload – V3

NJRO-GEN-GUIDE-014

Page 1 of 14





LPMS Recruitment Upload

Contents:

LPMS Access

Recruitment Tab

Recruitment Upload

LPMS Recruitment Flowchart

LPMS Access

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

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.

LPMS and Recruitment Upload – V3

NJRO-GEN-GUIDE-014

Page 2 of 14





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 Recruitmen	nt - Event - Enrolled	i											
F	Recruitment Type:	Event - Enrolled	* Fina	ncial Year OCal	endar Year								
Study Total: 5													
												x	W pho
Financial Year	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total Year
2021/22												1	1
2022/23		з	1										4
Trust Total: 5													
												x	W yka
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	e Target: 5												
												x	W yka
Financial Year	Apr	Мау	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Total Year
2021/22												1	1
2022/23		з	1										4

LPMS and Recruitment Upload - V3

NJRO-GEN-GUIDE-014

Page 3 of 14





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'.

Pre-Screened
Consented
Screening
Recruited
In Follow Up
Follow Up Complete
Withdrawn
Screened Pass
Screened Fail
[NOT SET]

Recording Recruitment

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

← → C ☆ 🔒 https://nenc.reda.org.uk/projects/proje	ectPatientScreening.aspx?projectid=29866&lo	cationid=692
👯 Apps 🔤 NIHR Hub 🕒 ODP 📄 CPMS 🔤 CPMS Feedback	: 🔤 CRN Central 🔤 CRN:NENC 🔳 HSCIC 🤝	🕨 LPMS 🤝 LPMS Test 🔝 Review Manager 🥥 Webex 🚥 B
Work Area Search Reporting Admin Mr	r Ian Johansson -	
Portfolio ID 🔹 999999	G0 UNIVERSITY HOSPITAL OF NORT	'H TEES
Actual Start Date [NOT SET]	Actual End Date [NOT SET]	Site Status: [NOT SET]
Project Short Title: COMPASS (BAY 59-7939/1578	86) Correct Study & Correct Site	
Study Details Recruitment Governance P	Project Audit Documents Contra	cts Post Approval NENC SSCs
Targets and Dates Participants Overview Par	ticipant Details Recruitment Totals	Arms
Participants		
+ Add New Participant 🗟 Import Participants		
Participant ID: Scr	eening ID:	Current Status:

LPMS and Recruitment Upload - V3

NJRO-GEN-GUIDE-014

Page 4 of 14





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.

Add Patient		
	Q Search Participant	
*Participant ID:	NT00123	
Screening ID:	Last Screenin	g ID Entered:
Participant Type:	[NOT SET]	
Referring PIC: PI: Investigator: Current Medication: Participant History:	Carers Diagnostic, screening or prevention participants Genetically predisposed Other Participant with the relevant condition Participant without condition Pre condition Professionals Relations	
Comments:		
	Save & Close Close	

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

LPMS and Recruitment Upload - V3

NJRO-GEN-GUIDE-014

Page 5 of 14





- 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.**

Add Participant		x
		Current Status: [NOT SET]
* Participant ID:		
Project Arm:	[NOT SET] •	
Screening ID:	Last Screening ID Ente	red:
Participant Type:	[NOT SET]	•
Referring PIC:	[NOT SET] •	
Date Referred:	Select Date	
Principal Investigator:	Dr Vijay Kunadian	
Investigator:		
Year of Birth:		
Current Medication:		

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

+ Add New Participant	🛃 Import Participants						×	V 👳
Participant ID:	Screening ID:	Current Status:			Last Event:	Date:		
NT00123		Consented	No Event	T	A.	01/11/2016		Delete
Newly added Parti	cipant	Select Consented	Leave as 'No Event'		A			
			Save Save (bott	om of scree	en)			

- 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.

LPMS and Recruitment Upload - V3

NJRO-GEN-GUIDE-014

Page 6 of 14





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'

+ Add New Par	ticipant 🛛 🔒 Impo	rt Participants				
Participant ID:	Screening ID:	Current Status:	Current Status shown	Last Event:	Date:	
NT00123		Consented •	will be the Status with the latest date	No Event	01/11/2016	Delete
NT00124		Recruited 🔹		Randomised	09/11/2016	Delete
NT00125		Screening 🔻	No Event	No Event	Select Date	Delete
			Patient Eligible Patient Ineligible	Some Status information	items have extra and functionality	

• 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).

LPMS and Recruitment Upload - V3

NJRO-GEN-GUIDE-014

Page 7 of 14





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)

1	A	Ð	C	D	E	F	G	н	1	1	T.	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 (KRe85)			FREEMAN HOSPITAL	23/08/2817	Participant with the relevant condi	NUTHD1	Consented	1969			
3	32352	Knee Replacement (KReBS)		RTDOL	FREEMAN HOSPITAL	24/08/2017	Participant with the relevant condi	NUTH02	Consented	1978		1	
4	32352	Knee Replacement (KReBS)			FREEMAN HOSPITAL	25/08/2017	Participant with the relevant condi	NUTHOS	Recruited	1361			
-	32352	Knee Replacement (KReBS)		RTD02		23/08/2017	Participant with the relevant condr	IT VIDS	Consented	1383		í(i).	
6	32352	Knee Replacement (KReB5)		RTD02		23/08/2017	Participant with the relevant condi-	RV101	Recruited	1989	This row will a	ot import as du	plicate Participant ID
7	\$2352	Knee Replacement (KReBS)		RTD02		24/08/2017	Participant with the relevant condi	ffV102	Screened Fail				
8	32352	Knee Replacement (KReBS)		#1002		25/08/2017	Participant with the relevant condi-	RVI03	Screened Fail				
	Required	Required	Optional	Site Identifier a	nd\or Site Name Required	Required	Required	Required	Required	Required (where data is available/applicable)	Optional	Optional	Optional

LPMS and Recruitment Upload – V3

NJRO-GEN-GUIDE-014

Page 8 of 14





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

Work Area	Search	Reporting	Admin	Finance Te	est 🗸				
Portfolio ID Actual Start I Project Short	▼ Date 1/06 Title: CAN	13492 /2015 1 DID		Go Actua	YARM MEE	DICAL PRA	ACTICE	2	Site
Study Detail	s Recru	itment G	overnance 3	Finance	Project	Audit	Documents	Contract	s
Targets and	Dates	Participants O	verview	Participant	Details	Recruit	ment Totals	Arms	
Participants									
				_					
+ Add Ner	w Participa	nt 🗟 Import	t Participant	s 4					
Participant I	D:			Screening I	D:			Current Sta	atus:
No records t	o display.								

• 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.

Search Rep	orting Adm	in Joseph Taylor -		Help (0207 099 2
Import Participar	its			×
	🚔 Browse	File not Selected	Upload	
		Download Import Sample		

Upload the Template file

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

LPMS and Recruitment Upload - V3

NJRO-GEN-GUIDE-014

Page **9** of **14**





рог	t Participants					×
2	Change	Import 32511 Short.	xlsx		× Clear	♥ Upload
() () ()	D Do not overw Dverwrite exi	ownload Import Sam rite existing participa sting participants (Fi	iple ants (Partial Import) ull import)			
	Participant	ID: Site Name:	Consent Date:	Investigator:	Status:	Type:
4	RVI0001	THE ROYAL VICTORIA INFIRMARY	03/01/2017		Recruited	Participant with the relevant condition
¥	RVI0002	THE ROYAL VICTORIA INFIRMARY	04/01/2017		Recruited	Participant with the relevant

- 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.

ticipant ID:	Screen	iing ID:	Select to view import history
0001			1
	View Participan	t Imports	
	Status:	Date Uploaded:	User:
	Importing	06/01/2020	Mr Ian Johansson
	Completed	06/01/2020	Mr Ian Johansson

LPMS and Recruitment Upload – V3

Page **10** of **14**

NJRO-GEN-GUIDE-014





- 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 and Recruitment Upload – V3

NJRO-GEN-GUIDE-014

Page 11 of 14





LPMS Recruitment Flowchart

Adding a Consent Date



LPMS and Recruitment Upload - V3

NJRO-GEN-GUIDE-014

Page 12 of 14





Adding a Screening Date



LPMS and Recruitment Upload - V3

NJRO-GEN-GUIDE-014

Page 13 of 14





Adding a Recruited Date



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).

LPMS and Recruitment Upload - V3

NJRO-GEN-GUIDE-014

Page 14 of 14