

EBMT Registry

User manual for data editors and data viewers

July 2024, v2

EBMT Registry

EBMT Clinical Research & Registry Department



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New EBMT Registry

If not stated otherwise, in the context of the current manual, the term EBMT Registry is used to describe the web application created to collect, view, edit and retrieve data and associated with the application databases.

IMPORTANT NOTE: the EBMT Registry is in an ongoing development process. Screenshots in this manual might be slightly different from the live application. We strive for having the most up-to-date information.

Objectives

The purpose of the EBMT Registry is to provide a pool of data to EBMT members to perform studies, assess epidemiological trends and ultimately improve patients' lives. The EBMT Registry underpins extensive European research that translates into changes in clinical practice and improvements in patient outcome and care. With constant development of the field, the data set to be collected changes, thus the database also needs to change and adapt to reflect the latest trends. In recent decades, EBMT members used services such as ProMISe (Project Manager Internet Server) and Castor to collect, enter and use information of their patients and donors. Unfortunately, these services could not accommodate all the needs of EBMT members, thus it was decided that a completely new EBMT Registry should be created.

EBMT involved their staff, software developers, analytical specialists, doctors, representatives of different medical centres, regional and national organisations and other stakeholders to ensure that the new EBMT Registry satisfies everyone's needs.

It is important to note that after extensive data quality checks and cleaning, the data collected by EBMT since 1974 is transferred to the new EBMT Registry where it can be used by users within their access rights.

EBMT Registry database structure

The EBMT Registry is a flexible data entry web application, connected to a fast and responsive live application database, enabling users to enter and retrieve data. The application database is then connected to the analytical database where all the data is restructured and organised according to the Observational Medical Outcomes Partnership (OMOP) Common Data Model (CDM) (for more details on OMOP CDM please refer to <https://ohdsi.github.io/CommonDataModel/>).

Splitting the databases has allowed EBMT to separate and accommodate the data entry needs from the analytical needs. A lot of work has been done for the EBMT Registry database to acquire an internationally recognised standardised OMOP CDM analytical database which is patient-centric, flexible and extendable. This is deemed to cover EBMT requirements and will offer new possibilities in terms of data analysis to EBMT partners and stakeholders.

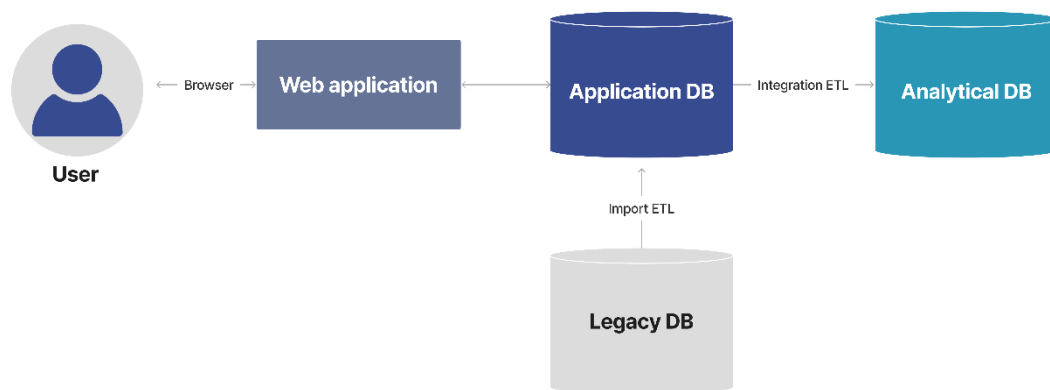


Image 1, schematic view of EBMT Registry application setup

Data entered by users through EBMT Registry web application is recorded in the application database, which always reflects the latest state of data, and then it is copied, transformed and transferred into the analytical database according to a predefined schedule (currently once per 24 hours), thus there is expected delay to have data changes reflected in the analytical database. Otherwise the data is considered to be equivalent, only organised in two different ways: the application database is event centric while the analytical database is patient centric.

EBMT legacy data (i.e. all the data collected by EBMT before the EBMT Registry went live) was extracted from ProMISe and Castor, transformed and loaded into the EBMT Registry application database and then, through integration ETL, also loaded to the analytical database. ETL is a type of data integration that refers to the three steps: extract, transform and load; it is used to organise data from multiple sources.

The information shown via the user interface of the EBMT Registry is always the latest! Export (extraction) of data (via MicroStrategy analytical export tool) is done from the analytical database. It is recommended to wait 24 hours from the last data entry or edit before exporting data if a user wants to have these changes included into data export.

Technical requirements and specifications

In order to access and work smoothly with the EBMT Registry, the users need to comply with the following technical requirements:

1. Computer with a stable internet connection. The EBMT Registry is a web-based application and requires access to the internet to load web pages. Large exports might require noticeable download time if the user's connection is slow.
2. Computer with a mouse, touchpad, touchscreen or similar device to navigate around the screen interface.
3. One of the following supported internet browsers:
 - **Google Chrome:** the latest 2 versions of the browser on all operating systems.
 - **Mozilla Firefox:** the latest 2 versions of the browser on all operating systems.
 - **Microsoft Edge:** the latest 2 versions of the browser on Windows operating system.
 - **Safari:** the latest 2 versions of the browser on iOS and macOS operating systems.

It is expected that other browsers also work correctly with the EBMT Registry, but it was not possible to perform sufficient testing and guarantee its high performance.

4. A screen that has a resolution of 1080p or higher. Screens with lower resolution were not tested, thus the correct layout of the web pages cannot be guaranteed.
5. A personal work email address to which the user has access. Shared emails must not be used.
6. Authenticator application: it can be MFA for smartphone, tablet or computer. (see [Multi-factor authentication](#)).

Multi-factor authentication

Multi-factor authentication (MFA) with an authenticator application is mandatory to enter the EBMT Registry. It is a security feature that requires users to provide multiple forms of identification to access EBMT Registry and patients/donors information. One of the MFA applications must be installed on the user's computer, tablet, or smartphone:

- Google authenticator (both app and extension to the web browser);
- Twilio Authy;
- Microsoft Authenticator;
- 1Password (desktop app);
- Symantec VIP Access app;
- LastPass Authenticator;
- 2FAS;
- Duo Mobile;
- Dashlane (desktop app);
- Bitwarden (desktop app);
- Authenticator App by 2Stable (app for iPhone, iPad, iPod, Apple Watch and Mac);
- Step Two;
- TOTP Authenticator (desktop app, this is a browser extension).

This means that this MFA device shall be always available and used when a user needs to [Sign in](#) to the EBMT Registry. In case a MFA device becomes unavailable (e.g. lost, stolen, broken, replaced by a new device), the user should contact the EBMT Registry Helpdesk by email registryhelpdesk@ebmt.org to [reset MFA settings](#) for this user.

User session

It is essential to note, that once a user signed in and entered the EBMT Registry, the user session remains active. For the security reasons, the user session will expire automatically and the user will be signed off after 20 minutes without activity. Termination of the user's session means that the user is signed out and the sign in page is shown on the screen.

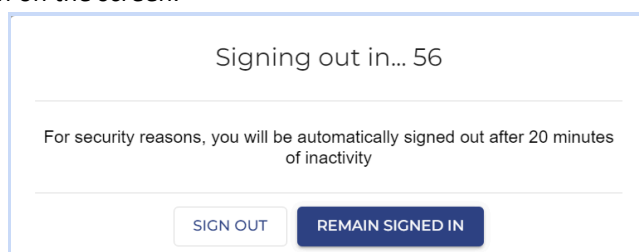


Image 2, Warning on automatic termination of user session due to inactivity

Important: EBMT Registry does have active termination of a user's session after 20 minutes of inactivity, it means that during that time, the information on the web page remains visible. Thus, users are strongly

advised to use the [Sign out](#) process and lock the computer screen even for short periods of time to prevent unauthorised access to the data.

Data ownership and protection

EBMT is strongly committed to protecting the privacy of personal data that we maintain about patients, donors, members and users of the EBMT Registry. The EBMT ensures that all personal data under its responsibility is processed according to the EU General Data Protection Regulation (GDPR).

For more information on Data Protection and Privacy, please refer to the EBMT website <https://www.ebmt.org/registry/data-privacy>.

Audit trail

Audit trail is an important feature of the EBMT Registry to track changes made to data of [patients](#) and [donors](#), [users](#), [centres](#) and other [registered entities](#). All actions are registered in the audit trail. The Audit trail information is not available to users of any roles but for a minimal number of specialists from EBMT Registry. This section describes its general overview and setup.

The audit trail is implemented with two main concepts in the EBMT Registry:

1. The **audit trail entries** provide an explicit event log of initiated actions and the circumstances in which they took place (who did what when).
2. The **version histories** provide a detailed history of data fields throughout its lifetime - what data was added/changed and why. Version histories cannot be used to back up or cancel changes. It is used purely for trackability of actions.

Audit trail and version histories can be used separately or together.

This division was established to satisfy the regulatory requirements without impacting performance or compromising audit trail readability. Here below is a short summary of its specifications:

- Version histories contain data points which may describe sensitive data that is not to be shared outside of exceptional circumstances;
- Version histories represent data entities in their entirety, which makes it simpler to reconstruct what has happened after the change;
- The audit trail entries focus on what actions took place and can just refer to the new version of a data field that was created as a result;
- The audit trail entries do not contain sensitive material and can therefore be more easily exported or even shared, if required.

Note: further improvements are planned to be done to the Audit trail access in the upcoming versions of the system.

Wiki

The EBMT Registry includes a link to the specifically designed Wiki platform.

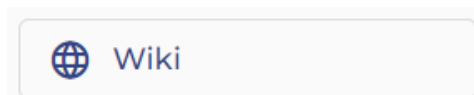


Image 3, the Wiki icon in the EBMT Registry navigation menu

Wiki is a document platform where EBMT Registry users can find useful information they might need in the process of data entry or interaction with the system, such as:

- EBMT Registry user manual for data viewer and data editor;
- Reference to Data collection forms and completion guidelines;
- FAQ: frequently asked questions.

Users can search for the topics through the content, keywords or tags.

MicroStrategy

EBMT Registry is linked to MicroStrategy tool designed to enable data access, enhancement of data analysis and visualisation for the end users of the EBMT Registry. More information on MicroStrategy can be found on the [EBMT website](#).



Image 4, the MicroStrategy icon in the EBMT Registry navigation menu

Demo environment

All users enrolled into the EBMT Registry training in the e-learning will be able to access the EBMT Registry Demo environment (also referred to as Demo) before they are granted access to the real system. Demo is a training environment and copy of the system for training purposes only, thus no real patient's or donor's data must be entered, only fake data can be used.

To access the EBMT Registry Demo, users should follow the following process:

1. Open <https://demo.registry.ebmt.org/> in their web browser.
2. [Sign up](#) (register and create username and password), please make sure you use the email specified in the *EBMT Registry User Account Request form*.

Important: do not use ebmtshared email address or any other personal email address other than the one, indicated in the EBMT Registry User Account Request form for your user.

3. [Set up MFA](#)

Note: the Username and Password, as well as the MFA device and MFA set up a user creates to access the Demo will also be used and valid later when the user gains access to the EBMT Registry.

Thus, EBMT recommends setting up all these parameters having in mind that they will be used in the future to access the real EBMT Registry. The user may request settings it to be reset by emailing the Helpdesk, but it will cause some delays in gaining access to the system after completion of the training.

The Demo environment has the same system version as the real EBMT Registry, but the events are configured separately. The fake data entered into the demo environment cannot be exported or extracted via MicroStrategy analytical tool.

IMPORTANT NOTE: the EBMT Registry is in an ongoing development and improvement process. The configurations of event forms in the demo environment might be slightly different from the live application. The demo environment might be cleaned (wiped out) from time to time. Only one version per event form is used in Demo, this should be taken into account while training (e.g. while training or practising filtering).

The demo environment is clearly marked to avoid users to confuse it with the real system:

1. There is a label Demo environment in the top part (visible in all sections of the system).
2. Demo environment is the first section shown in every event form.
3. The first data field in every event form is asking users to confirm they are aware of the demo environment training purpose.

Unless this data field contains the correct answer, the remaining data fields in the event form are hidden. Once a data editor enters the correct answer to this data field and saves the form, the event form is shown in full to all users of the demo environment with access to such event.

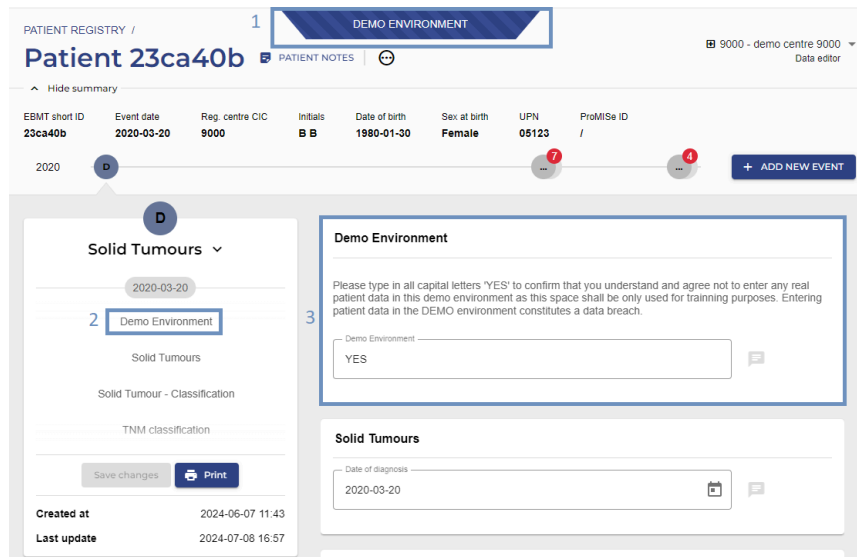


Image 5, EBMT Registry Demo environment identifiers: 1 demo environment label, 2. demo environment in the event summary, 3. demo environment data field in every event form.

Patients and Donors

Patient

A **Patient** is a person who received a haematopoietic cell transplantation (HCT) procedure; an individual with bone marrow failures receiving immunosuppressive therapies; and/or a person receiving cellular or gene therapy.

The **EBMT Patient Registry** collects pseudonymised clinical data of consenting patients, including aspects of the diagnosis and disease, first-line treatments, HCT, cellular or gene therapy-associated procedures, transplant type, donor type, stem cell source, complications and outcome. Patients are followed-up indefinitely or as defined by EBMT (see [Data collection](#)). Once registered, patients may only be deleted by the Administrator of the system if they withdraw their consent and specifically request their data to be removed from the EBMT Registry (see [Edit Patient consent](#)).

Every Patient in the EBMT Registry is registered as a unique individual and assigned with:

- EBMT patient ID;
- EBMT short patient ID.

EBMT patient ID (long ID) - a unique patient identifier in the EBMT Registry that is generated automatically by the system in GUID / UUID format at the moment of patient registration in the EBMT Registry. It is a long code that contains letters (English alphabetic characters: a to z) and numbers (Arabic numerals: 0 to 9) for internal system use. It is not expected that users need to use it while interacting with EBMT Registry, but in case needed, the EBMT patient ID is shown in the Edit patient details section of the [Patient menu](#).

Edit patient

1
2

Patient information
Reason

Patient ID
 e4ef183b-e172-47de-8c9a-0ef4abbbed78

Date of birth
 1968 Jul 15

Image 6, the long EBMT patient ID shown in the patient menu-Edit patient section

EBMT short patient ID (short ID) - shortened version of the long EBMT patient ID for the convenience of the users to be used to find patients in the system. The EBMT short ID consists of the last seven digits of the EBMT patient ID, it is shown in the patient page.

PATIENT REGISTRY /
DEMO ENVIRONMENT
9000 - demo centre 9000
Data editor

Patient bbbbed78

^ Hide summary

EBMT short ID	Event date	Reg. centre CIC	Initials	Date of birth	Sex at birth	UPN	ProMiSe ID
bbbbed78	2023-02-05	9000	M O	1968-07-15	Female	9998	/

2018

D

T

F

+ ADD NEW EVENT

Image 7, the EBMT short patient ID shown in the Patient page

UPN (unique patient number) - the number/code used by the transplant centre or other entity to uniquely identify this patient. The organisations that input patient data have their own internal patient identifiers that should be entered into the EBMT Registry at patient creation and are used for the duplicate check, the users can also use UPN in order to search for patients.

In case of an error or change of UPN number, data editors are able to correct the UPN through the user interface (see [Edit Patient UPN](#)).

All patients in the EBMT Registry are **linked** to one or more centres. This means that centres have access to the patient data.

For the users' convenience, the EBMT Registry will still keep the record of ProMiSe ID for patients who were registered in ProMiSe system and later migrated into the EBMT Registry. However, this field is not relevant and will be empty for patients registered in the new EBMT Registry.

Every Patient is registered with some general data (see [Add Patient](#)) and associated medical events (see [Add new event](#)), more details on data collection are provided on the EBMT website under the [Data collection](#). If a patient does not consent to share their data with EBMT, said Patient cannot be registered in the EBMT Registry and only minimal data on performed treatment can be collected (see [Anonymous events](#)).

Patient event

A patient [event](#) represents a significant occurrence related to a patient's medical condition. Every event in the EBMT Registry corresponds to a specific Data Collection Form (DCF). An event definition provides a way to document and track a patient's medical history over time. Registered events provide a comprehensive picture of the patient's health status and treatment progress or outcome.

The latest versions of DCFs can be found on [EBMT website](#) together with their respective completion guidelines.

Patient event category

Since EBMT has a high number of patient events, they are grouped into the following **patient event categories**:

- **Diagnosis:** it includes forms for primary diagnosis that was an indication for the treatment and other non-indication diagnosis that may directly or indirectly influence the outcome of the treatment;
- **Treatment:** it includes treatment specific forms (Autologous HCT, Allogeneic HCT, Cellular therapy, Gene Therapy, Immunosuppressive Treatment), and Disease status at HCT/CT/GT/IST;
- **Follow-up:** all follow-up (FU) forms, e.g. HCT Day 100 FU, HCT Annual and unscheduled FU, CT FU, GT FU, etc.
- **Other:** study specific forms, etc.

Thus, every patient event contains a specific set of data (data fields) as per the corresponding Data Collection Form.

Some patient events also contain questions on donors and donated material, but this information is collected purely for the completeness of the specific Patient treatment and cannot be considered as donor registration (see [Donor outcome registry](#)).

When a new patient is being registered in the EBMT Registry, an [automated duplicate check](#) is performed: registration data of the new patient is compared to data of existing patients in the database. When a duplicate is suspected, the system warns the user and marks the new patient with a **tentative patient status**.

Extended dataset

The data collection forms can be divided into the core dataset and the extended dataset. In the EBMT Registry, the users can open an event form and then choose to fill in its extended dataset variant using the toggle-button in the top right corner of each of the sections. Additionally, extended dataset fields are clearly marked in the event form (see [Extended dataset data fields](#)).

It means that extended dataset form is a longer and more detailed variant of a core dataset form. The users are able to choose to fill in extended dataset fields per each section of an event form separately (see [Extended dataset data fields](#))



Image 8, extended dataset toggle icon

Tentative patient

A Tentative patient is a temporary status automatically assigned to the patient by the system, to mark that it is a possible duplicate to an existing patient earlier registered in the system. Only an [Administrator](#) can remove tentative status from the patient record after more comprehensive and thorough evaluation.

An Administrator will revise the tentative patient record and follow-up with the centre on such cases, if needed. If the new patient is confirmed to be a duplicate of an existing one - the new patient will be deleted from the system. If it is confirmed that this is a unique patient, the Administrator will remove the tentative patient status and the patient will then appear as a regular patient in the system.

Tentative patient status is assigned by the system to *possible* duplicates while comparing patient birthdate, initials, sex at birth, blood group, rhesus factor to the data of existing patients (registered by any centre within the same country). If the existing and the new patient have the same UPN within the same centre, this is not considered as a possible duplicate but an *exact* duplicate, thus the system will not allow registration of a duplicate showing the corresponding error message (see [Duplicate check](#)).

Note: if the patient is marked by the system as tentative, but the registering centre is sure that this is a unique patient who has never been registered in the EBMT Registry, the centre (user) can send an email to the EBMT Registry helpdesk specifying patient short ID and centre CIC to speed up the removal of the tentative status for this patient.

Donor

A **Donor** is a person who is the source of cells or tissue for allogeneic HCT or cellular therapy product.

EBMT Donor outcome registry is a separate independent section of the EBMT Registry. It focuses on the collection of information on the health outcomes of consenting individuals who have donated their bone marrow cells or other cellular material for allogeneic HCT or immune cells for cellular therapy. Donors are registered in the EBMT Registry as separate individuals and do not have any system links with the recipients (patients). This was a specific requirement in order for the EBMT Registry to fulfil the European requirements for the donor registries.

Some Donor data is registered in the Patient registry (as mentioned above) to provide a complete set of data on transplant or product used for treatment. It may even contain some data fields as in the Donor outcome registry. Since the two databases are not linked, it was not possible to avoid registering some information twice (see respective data collection forms for more details).

Every Donor registered in the EBMT Registry represents a unique individual and is assigned with:

- EBMT donor ID;
- EBMT short donor ID.

EBMT donor ID - a unique donor identifier in the EBMT Registry that is generated automatically by the system in GUID / UUID format at the moment of donor registration in the EBMT Registry. It is a long code that contains letters (English alphabetic characters: a to z) and numbers (Arabic numerals: 0 to 9) for internal system use. It is not expected that users need to use it while interacting with EBMT Registry, but in case needed, the EBMT donor ID is shown in the Edit donor details section of the [Donor menu](#).

Edit donor

Donor ID 2b96b14f-08bc-4351-ae15-8af4e7161625
Date of birth* 2022 Month Day

Image 9, the long EBMT donor ID shown in the Donor menu-Edit donor section

EBMT short donor ID - shortened version of the EBMT donor ID for the convenience of the users to be used to find donors in the system. The EBMT short donor ID consists of the last 7 digits of the EBMT donor ID and is shown in the Donor page.



The screenshot shows the 'Donor 4d3e18b' page in the 'DEMO ENVIRONMENT'. The 'EBMT short ID' field is highlighted with a blue box and contains the value '4d3e18b'. Other fields include Event date (2024-06-01), Reg. centre CIC (9000), Initials (j p), Date of birth (2021-02-01), Sex at birth (Male), Donor number (2222222), ProMiSe ID (/), and GRID (684569640797658058566). A timeline at the bottom shows the year 2023 with a blue circle labeled 'F'.

Image 10, the EBMT short Donor ID shown in the Donor page

Donor ID - identification given to a donor by the collection centre or centre responsible for follow-up. This field may be empty, in case only GRID is used for this donor as an identifier. If donor ID is entered, it is shown in the Donor page.

In case of error or change of Donor ID number, data editors are able to correct the Donor ID number through the user interface (see [Edit Donor ID number](#)).

Global registration identifier for donors (GRID) - see <https://wmda.info/> for more details on GRID. GRID is used mostly for unrelated donors. Some donors, who do not have GRID assigned, will have this data field empty and only Donor ID will be used as explained above.

Note: The concept 'GRID for life' was withdrawn in 2017. Every issuing organisation (IO) is currently allowed to assign a new GRID to an existing but relocated donor.



The screenshot shows the 'Donor 4d3e18b' page in the 'DEMO ENVIRONMENT'. The 'GRID' field is highlighted with a blue box and contains the value '355300006043201632'. Other fields include EBMT short ID (4d3e18b), Event date (2024-06-01), Reg. centre CIC (9000), Initials (j p), Date of birth (2021-02-01), Sex at birth (Male), Donor number (2222222), and ProMiSe ID (/). A timeline at the bottom shows the year 2023 with a blue circle labeled 'F'.

Image 11, the Donor GRID shown in the Donor page

In case of error or change of Donor GRID, data editors are able to correct it through the user interface (see [Edit Donor GRID](#)).

Every Donor is registered with some general data as requested in the Donor Registration form and associated donor events.

Donor event

There are 2 donor events: the one to report details on the donation procedure and 30 days follow up and another one for long term follow-up. All donations of a particular individual are registered under the same donor. Information on donors is entered into the EBMT Registry by the transplant centre (or Donor Registry in case of unrelated donors).

Users

Users

The EBMT Registry is designed to be used by various individuals with different necessities and tasks, including, but not limited to:

- Principal Investigators;
- Data Managers;
- Other authorised staff members of a centre or hospital;
- National registries in the field of blood and/or bone marrow transplantation and IEC therapy (upon request and based on signed agreement);
- Donor centres and registries authorised staff members;
- EBMT research staff;
- Registry support team;
- Authorised auditors or data monitors (perform source document verification).

A **User** is an EBMT member listed on a centre's team member list or EBMT staff who interacts with or makes use of the EBMT Registry. This includes individuals who browse content, perform searches, input or export data, or engage in any other activity within the application.

Users are registered in the EBMT Registry based on the information provided by the PI in the **EBMT Registry User Account Request form** that includes the following data: user's first name, last name (surname), email address, details of organisation/entity they represent, etc. The request forms as well as procedure to gain access to the EBMT Registry is explained on the [EBMT website](#).

Note: To access the new EBMT Registry database, Principal Investigators (PIs) need to submit the request on behalf of their staff members using **EBMT Registry User Account Request form**. Only requests on behalf of EBMT members listed on the centre's team member list will be accepted, all individuals must register using their professional email addresses.

User ID - is a unique user identifier in the EBMT Registry that is generated automatically by the system at the moment of user registration in the EBMT Registry. It contains 7 digits and is used when it is needed to provide a reference to a particular user within the system without sharing their personal information (e.g. in data queries conversation). User ID can be found in the [User profile](#).

My profile details



ID
d01c806

Image 12, the user ID in the EBMT Registry

Users are linked to one or multiple [Centres](#) and/or [Virtual Registries](#) (VR), this means that they represent this organisation/entity and that this organisation/entity authorises this individual to access a particular set of data and perform some tasks (see [Context](#) for more details). A separate request form must be submitted for each centre/VR the user requires access to.

When a user [Signs up](#) and [Signs in](#) to the EBMT Registry, they should indicate the following data:

Username

This username can be used for login purposes only. It is created by the user and can contain letters, numbers and/or special characters and cannot contain any white spaces. This is not the user's first and last name, though it can contain it if the user prefers.

Email

This is a work personal user email, specified in the **EBMT Registry User Account Request form**. In case the user inputs any other personal email, they will not be able to access the requested context and will need to go through the first sign up process once again (as a new user) with the email specified in the **EBMT Registry User Account Request form**.

Note: User email addresses registered in the EBMT Registry user account cannot be changed. If a previous email becomes unavailable, the user should contact EBMT Registry helpdesk by emailing registryhelpdesk@ebmt.org to deactivate the previous user account and submit a properly signed and filled **EBMT Registry User Account Request form** with the updated email so that the new user account can be set up.

Password

This is the personal password that the user will use to enter EBMT Registry. It must satisfy all the requirements as explained under the password field, and it must:

- contain a lowercase letter;
- contain an uppercase letter;
- contain a number;
- contain at least 8 characters;
- contain a special character or a space;
- not contain a leading or trailing space.

The password can be changed, if needed (see [Change password](#)).

Active/inactive users

The users in the EBMT Registry may be set as *Active* or *Inactive* by the EBMT Registry administrator or automatically.

Inactive users cannot get access to any data in the database. They are able to Sign in (if they have registered their username/email and created a password), but will see the message notifying them that they do not have an active account.

Active users can sign in to the EBMT Registry (if they registered their username/email and created a password) and then can see/access data of patients or donors linked to their centre/VR only if they have active context (if their centre or VR are set as active). If they do not have a context assigned by the administrator, or if they are linked to one inactive centre or VR, they will see an error message.

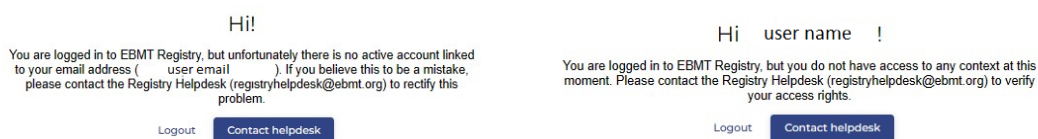


Image 13, the warning message for inactive users (L) and the message for active users with no linked context (R)

Important: The EBMT Registry will automatically change the user account from Active to Inactive when a user tries to log in after **three** or more months of not entering the system. Users should contact the EBMT Registry Helpdesk by emailing registryhelpdesk@ebmt.org to reactivate their user.

User role

The User role refers to the set of permissions granted to a user in the EBMT Registry. Depending on their **role**, users will have access to a different set of functionalities necessary to perform their duties.

In other words, the user role defines what a user can and cannot do within the EBMT Registry.

The following roles are used in the EBMT Registry:

1. **Data viewer:** can view and export entered data (via MicroStrategy) within their context.
2. **Data editor:** can view, add, edit and export data (via MicroStrategy) within their context; can see and answer data queries.
3. **Administrator:** oversees all other roles and manages the links between a user and centre/VR, between centre and VR, manages users (adds new users, activates or deactivates users). Administrator has access to all the functionalities other role types have.
4. **Data monitor:** this role is designed for EBMT or external monitors and allows to view data, perform source document verification (SDV), and/or manage data queries. By managing queries it is understood that a data monitor can open, answer or close a query on a particular data field from a patient event.
5. **Query manager + viewer:** this role is designed for EBMT staff mainly and is similar to the data monitor role, but excludes source document verification (SDV). It allows users to view data, and/or manage data queries. By managing queries it is understood that a query manager can open, answer or close a query on a particular data field from a patient event.
6. **Query manager + editor:** this role is designed for EBMT staff mainly and is similar to the data monitor role, but excludes source document verification (SDV). It allows users to edit data, and/or manage data queries. By managing queries it is understood that a query manager can open, answer or close a query on a particular data field from a patient event.
7. **Study manager:** this role is designed for EBMT staff to manage EBMT studies within EBMT Registry application.

EBMT Registry User Account Request form

The roles are assigned by the EBMT Registry administrator within each user context (see [Context](#)) based on submitted *EBMT Registry User Account Request form* and in line with established user management procedures explained on the [EBMT website](#).

The user role can be changed at any point to suit the needs of the user's work, allowing flexibility. If the user needs to change the role, the *EBMT Registry User Account Request form* has to be filled-in with the new requested role, properly signed and sent to the EBMT Helpdesk. The user also needs to complete the EBMT training for the required role.

Note: if the personal work email of a user changes, the EBMT Registry User Account Request form with updated email must be filled and submitted to the EBMT Helpdesk (see [Email](#)).

Data viewer

The data viewer role allows the user to access minimal functionality in the EBMT Registry and thus users require minimum training.

It is an important role and should be used/requested for users who do not perform data entry, as this is the major functionality not available for data viewers. Instead, the data viewer focus is on accessing the patient/donor data ((within the scope of patients or donors they received authorisation to access), on reviewing and analysing the data that has already been entered. They can also print and export data.

Data viewers cannot:

- answer data queries, if any (see [Query](#));
- view tentative patients.

Data editor

The data editor role allows users to access the functionality for data viewers and additionally data entry-related ones in the EBMT Registry.

It is an important role and should be used/requested for users who perform data entry (enter or edit data). As a data editor, such users have the ability to access, modify, and enter patient or donor data into the system, print and export data (within the scope of patients or donors they received authorisation to access). This role requires a high level of attention to detail and accuracy. This means users with a data editor role require more advanced training compared to data viewers.

Centres and virtual registries

The users receive access to the scope of data through the organisation/entity they represent. There are the following two main types of such organisations/entities:

- EBMT member centres (including donor centres);
- Virtual registries.

Centre

Centres use the EBMT Registry to enter and store their patients' and donors' data, while simultaneously making it available to the EBMT. Members submitting data can access and use their own data for their own purposes; they do not require permission and do not need to notify the EBMT. Member centres users have access to their own data at all times. Every user can see in the EBMT Registry only pseudonymised data of patients they have access to.

Registration centre is the centre that created the patient or donor record in the EBMT Registry. This centre will have access to the patient/donor record and patient events data even if later the patient continues the treatment in another centre or donor is being followed-up by another centre. Every patient/donor is linked to one or more centres. The registration centre is always marked in the patient/donor details. In case the registration centre disappears as an organisation (it is closed, merges with another centre, etc.), the new centre responsible for this patient will be identified and marked in the EBMT Registry as the patient registration centre. All such changes are reflected in the [audit trail](#) and can be done only by the EBMT Registry administrator.

In many cases a patient or donor is being followed-up by multiple centres, all these centres are called **reporting centres**. Thus the access to the patient or donor record is granted to other centres involved in

the data collection process through the specific form available on the EBMT [website](#). Access to the patient/donor record is provided for an indefinite period.

Note: When referring to 'patients of a centre', it is understood all patients the centre has access to, even if this centre is not a registration centre for some of these patients.

Centre Identification Code (CIC) - is a unique 3-4 number code (Arabic numerals: 0 to 9) assigned to every centre in the EBMT Registry. This code is used in official communications between the EBMT and the respective centre. This item is essential for proper registration of the data, submitted by the centre, as well as for other processes in the application.

Virtual registry

Virtual registry (VR) is a term used to describe a number of organisations that require access to the EBMT Registry for their users and include:

- Centre based VR (CBVR);
- Filter based VR (FBVR);
- Hybrid VR (HVR).

CIC term is also used to define a unique 3-4 number code (Arabic numerals: 0 to 9) assigned to every Virtual registry in the EBMT Registry. This code is used in official communications between the EBMT and respective VR. This item is essential for the proper registration of the data and correct setting of access rights.

Centre-based VR (CBVR)

It is a group of users that require access to certain centres' patient/donor data. Usually it is an organisation that unites a number of centres based on certain criteria (regional registries, national registries, group of centres, etc.).

Representatives of centre-based VRs require access to data of patients that belong to their member centres only. For some countries it is also a legal requirement for the national registries to have access to the data of the centres in their territory and supervise and control their activities.

Filter-based VR (FBVR)

FBVR is a group of users that require access to patients' and/or donors' data based on certain filtering criteria (it does not matter what centre the patient belongs to). For example, a group of scientists studying a specific topic who require access to pseudonymised patients data in the EBMT Registry that satisfies a very particular set of criteria (patients with particular diagnosis, that underwent particular treatment, born in specific period, etc.).

Practical example: EBMT Study group as a Filter-based VR will have access to the patients' data from different centres based on their research target group criteria (e.g. age, diagnosis, transplantation type, etc.).

Hybrid VR (HVR)

HVR is a combination of centre and filter-based VR, when a group of users requires access to a specifically filtered pool of patients and/or donors from a certain list of centres.

Practical example: EBMT recognised study group focused on analysis of data of patients from particular territory is seen as Hybrid VRs. They will have access to a pool of patients' data that satisfy specific criteria from a certain list of centres.

Active/inactive centre or VR

Administrators only can set the centre or VR status as **active** or **inactive**. Centre/VR can be set as inactive in some rare cases, for example in order to protect the security of their data, as per legal requirements or if centre/VR does not exist anymore.

Note: Centres/VRs are not deactivated automatically by the system due to inactivity. Deactivation is always done by the EBMT Registry administrator.

If the centre/VR is inactive: users linked to this centre/VR cannot choose it as their context, thus they are not able to access the patients or donors within this context.

If the centre/VR is set as active: users linked to this centre/VR can see it in the list of their context (in context menu), choose this centre as their context and thus they are able to access the patients or donors within this context.

If a centre/VR as an organisation is to be closed, merged with another one, or the structure changes and splits, this should be reported to the EBMT Registry helpdesk as soon as possible so that the EBMT Registry administrator can link the patients (registered by this centre) to the correct centres/VRs and make all necessary amendments. This will ensure a smooth and continuous data access and data entry process.

Context

Context - is a section of the database (data of a specific list of patients/donors linked to a centre or VR) that the user can access to perform their duties in the EBMT Registry.

The name of the context is the CIC and the name of a centre or VR that authorised the user to access their patients' data. Context is always linked to the user role.

Every patient in the system is linked to one or more centres (registration centre, reporting centre, etc.). Patients may also be linked to some VRs. Context is the scope of patients a centre or VR has access to and their data. Users cannot be linked to any patient directly. They can only use the Centre-patient or VR-patient link.



Image 14, schematic view of patient linking to a centre

If a user does not have access to any context or their context Centre/VR is **inactive**, they are still able to sign in, but they will see the message notifying them about this at the homepage of the application. All users should submit a properly filled and signed *EBMT Registry User Account Request form* and pass training certification to have their user activated and context assigned. If a user has already fulfilled all the

steps, but sees an error stating (s)he does not have access to any Context, the user should contact the EBMT Registry Helpdesk.

There are users that, due to their work particularities, have **multiple roles** and need different permissions and functionality within the EBMT Registry (e.g. they are doing patient data entry in one centre, work in a national registry and at the same time are doing a research study in the EBMT working party). In this case, the user uses the system in different contexts. For each context the user might have the same or different role and thus a different set of rights and permissions (see the diagram below as an example).

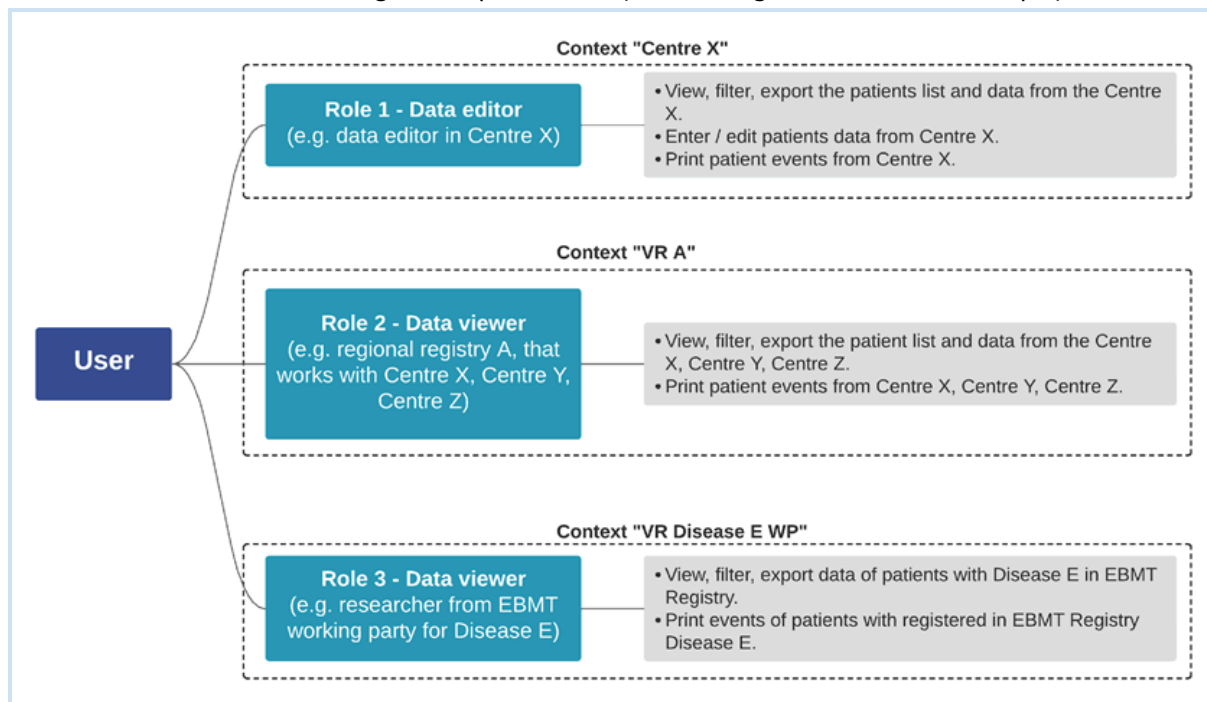


Image 15, description of a user that has multiple roles in multiple contexts

Important: in case a user has access to multiple contexts, these contexts exist independently and the user is assigned a role per each context, the rights and permissions of the user might be different in each context and are not combined.

Every user can have only one user account, which means this user is registered with one email and username and uses one password to enter the EBMT Registry. In case of multiple roles, a user logs into the system and the last used context is loaded, the user can change the context (s)he wants to work.

Only users with access to multiple contexts can switch between the contexts and can choose in which context to work without the need to log out. This can be done through the [Context menu](#).

Interface and screen layout

The EBMT Registry layout is designed to provide a seamless user experience. The screen is divided into the following sections:

1. The EBMT Registry logo is always shown on the left top corner of the screen.
2. The header displaying the name of the section the user is currently viewing (displayed on the main screen).
3. Context menu showing the current context name and the role of the user in this context.
4. Navigation menu for accessing different sections of the application quickly and easily.
5. The main screen is where the content of the opened section is displayed.
6. EBMT Registry version.

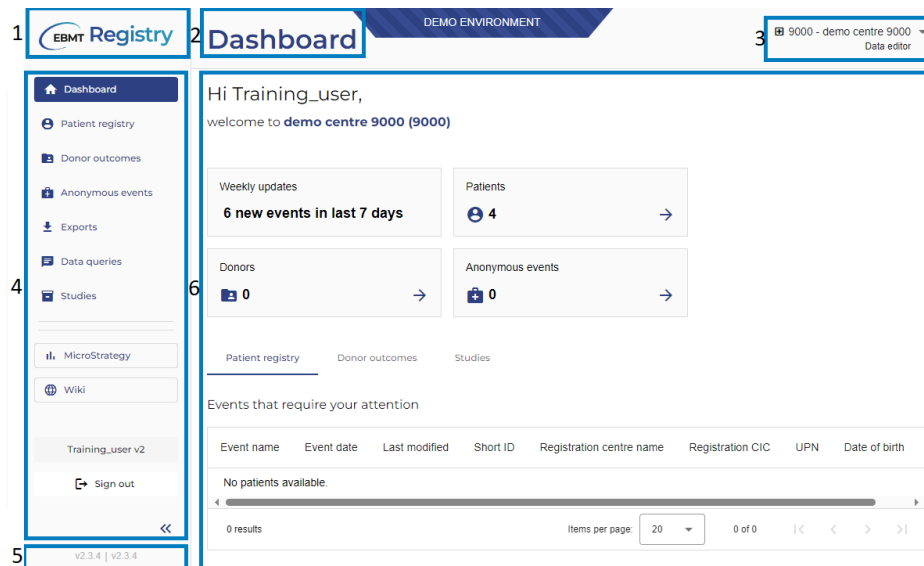
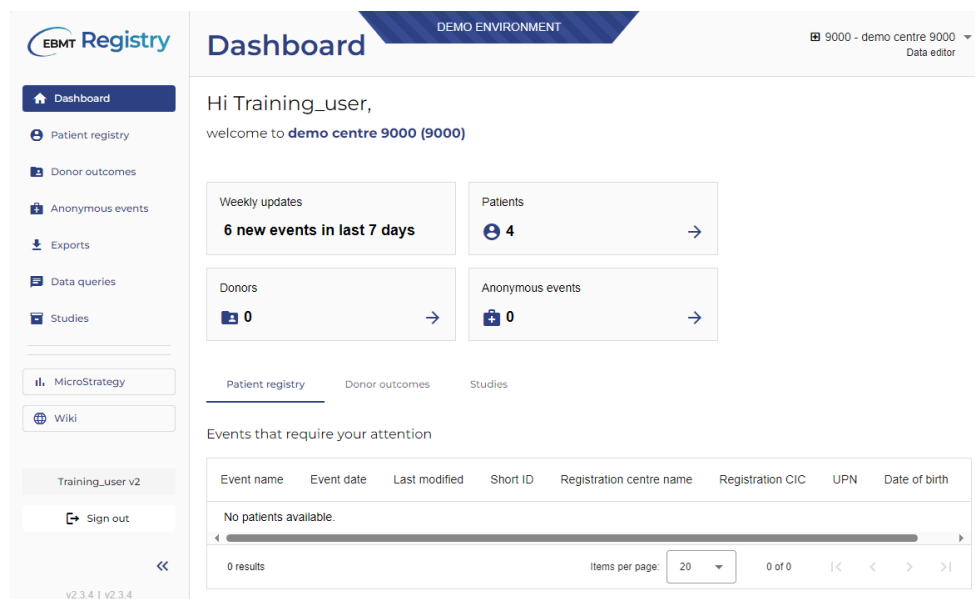


Image 16, landing page of the EBMT Registry after logging in



For sections and main screens where the overviews and long list of items is shown (like Patient registry overview, Donor outcomes overview, Data queries overview, etc.) there is also used [Pagination](#) at the bottom of the main screen.

Context menu

Context menu is always shown in the top right corner of the screen, regardless of what part of the EBMT Registry the user is currently in. By default, it shows the name of the Context, the user currently in and the user role in this Context (see image 17).

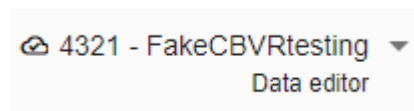










Image 17, context menu

Users with access to multiple contexts can click on any part of the menu, and a dropdown list with all available contexts for the user will open. This list will contain only active centres or VRs and show the CIC and the name of the Centre/VR. The User role is not visible in the dropdown list.

For users with access to one context, the context menu will always show the name of the context they have access to. They cannot see the dropdown list.

Navigation menu

Navigation menu is always displayed in the application on the left side of the screen. It includes the following navigation buttons:

Name (in full view)	Icon	Description
Dashboard		A button to go to the dashboard, which is the homepage of the EBMT Registry (see Dashboard).
Patient registry		A button to open the patients overview list in the user's current context (see Patient registry).
Donor outcomes		A button to open the donors overview list in the user's current context (see Donor outcome registry).
Anonymous events		A button to open a registry of treatments for non-consenting patients (see Anonymous events).
Exports		A button to open the exports overview list for anonymous events data.
Data queries		A button to open the overview of queries (see Queries).
Studies		A button to open the overview of EBMT study-related event forms.
Wiki		A button to open Wiki portal.






MicroStrategy		A button to open the MicroStrategy analytical tool library.
User profile	[user initials]	A button with the user full name or initials to open My profile details .
Sign out		A button to sign out (log out) from the EBMT Registry.
		A button to switch from Navigation menu full view to compact view.
		A button to switch from Navigation menu compact view to full view.

Table 1, icons used in the EBMT Registry navigation menu and their descriptions

When the section is opened in the main window,

the button is highlighted, e.g.  turns into



The navigation menu can be shown in **full** or **compact view**, the users can switch between them at their convenience by pressing the double arrow button. The compact view was designed to display more information on a user's main screen while working with the database.

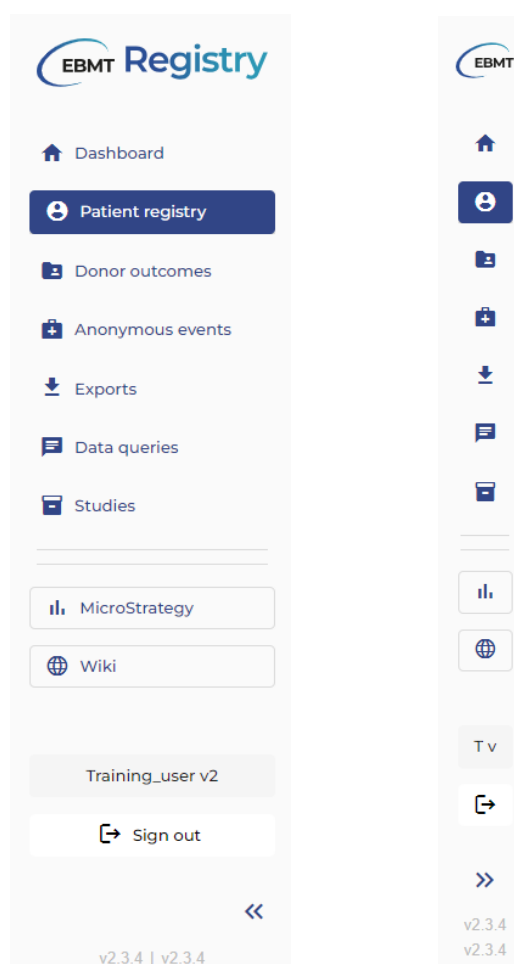
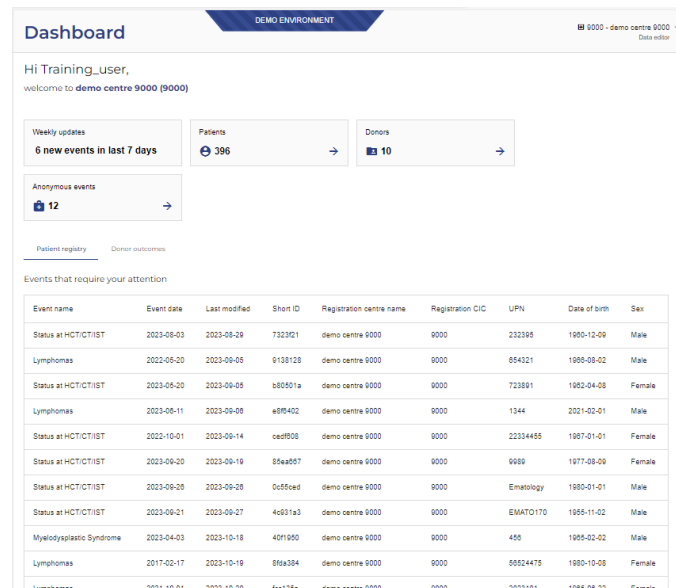


Image 18, Navigation menu in full and compact view

Dashboard

The dashboard is the home page of the EBMT Registry application. It always shows a greeting message with the user name and the context the user is currently in.



The screenshot shows the EBMT Registry Dashboard in a demo environment. At the top, it says 'Hi Training_user, welcome to demo centre 9000 (9000)'. Below this, there are three summary cards: 'Weekly updates' showing '6 new events in last 7 days', 'Patients' showing '396', and 'Donors' showing '10'. There is also a card for 'Anonymous events' showing '12'. Below these cards, there are two tabs: 'Patient registry' (selected) and 'Donor outcomes'. The main section is titled 'Events that require your attention' and contains a table with 10 rows of event data.

Event name	Event date	Last modified	Short ID	Registration centre name	Registration CIC	UPN	Date of birth	Sex
Status at HCT/CT/IST	2023-08-03	2023-08-29	732321	demo centre 9000	9000	232395	1980-12-09	Male
Lymphomas	2022-05-20	2023-09-05	6138128	demo centre 9000	9000	854321	1988-08-02	Male
Status at HCT/CT/IST	2023-08-20	2023-09-05	b80501a	demo centre 9000	9000	723891	1982-04-08	Female
Lymphomas	2023-08-11	2023-09-08	e898402	demo centre 9000	9000	1344	2021-02-01	Male
Status at HCT/CT/IST	2022-10-01	2023-09-14	ced808	demo centre 9000	9000	22334455	1987-01-01	Female
Status at HCT/CT/IST	2023-09-20	2023-09-19	85ea867	demo centre 9000	9000	9989	1977-08-05	Female
Status at HCT/CT/IST	2023-09-28	2023-09-28	0d5fced	demo centre 9000	9000	Ematology	1980-01-01	Male
Status at HCT/CT/IST	2023-09-21	2023-09-27	4c931a3	demo centre 9000	9000	EMATO170	1985-11-02	Male
Myelodysplastic Syndrome	2023-04-03	2023-10-18	40f1950	demo centre 9000	9000	485	1985-02-02	Male
Lymphomas	2017-02-17	2023-10-19	8f9a384	demo centre 9000	9000	58524475	1980-10-08	Female
Lymphomas	2021-10-01	2023-10-20	f0c135a	demo centre 9000	9000	2023101	1985-08-22	Female

Image 19, the dashboard

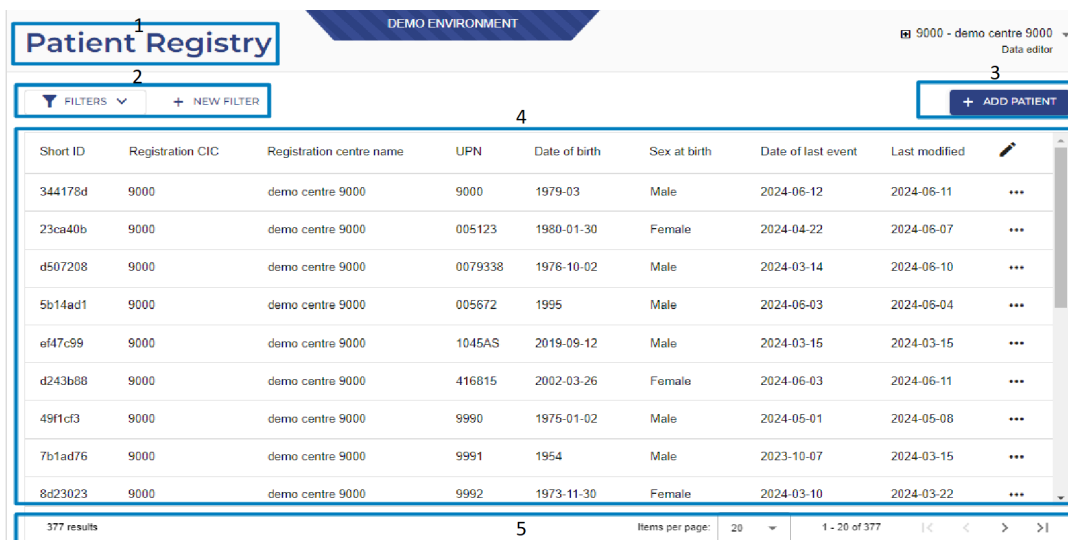
Whenever the user changes their context, they are always redirected to the dashboard with the greeting message containing the chosen context.

In the current version of the EBMT Registry, the dashboard will contain some general information about the patients/donors recently registered in the user context as well as useful links to data, requiring user's attention, e.g. patients records with errors or warnings and some other.

Additional information and functionality will be added to the dashboard in the next versions of the application.

Patient registry

The patient registry is part of the EBMT Registry that contains information on [patients](#) registered in the EBMT Registry and their [events](#).



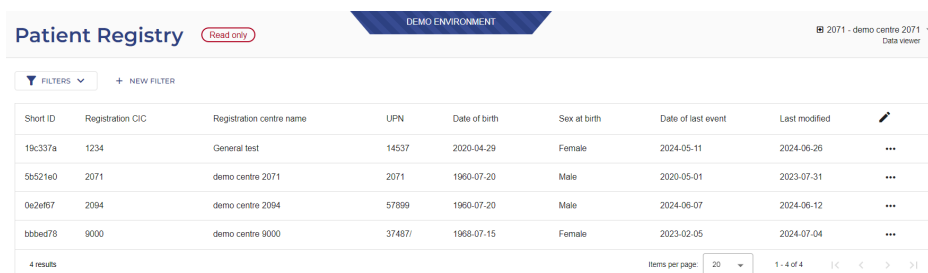
Short ID	Registration CIC	Registration centre name	UPN	Date of birth	Sex at birth	Date of last event	Last modified	
344178d	9000	demo centre 9000	9000	1979-03	Male	2024-06-12	2024-06-11	...
23ca40b	9000	demo centre 9000	005123	1980-01-30	Female	2024-04-22	2024-06-07	...
d507208	9000	demo centre 9000	0079338	1976-10-02	Male	2024-03-14	2024-06-10	...
5b14ad1	9000	demo centre 9000	005672	1995	Male	2024-06-03	2024-06-04	...
ef47c99	9000	demo centre 9000	1045AS	2019-09-12	Male	2024-03-16	2024-03-15	...
d243b88	9000	demo centre 9000	416815	2002-03-26	Female	2024-06-03	2024-06-11	...
49f1cf3	9000	demo centre 9000	9990	1975-01-02	Male	2024-05-01	2024-05-08	...
7b1ad76	9000	demo centre 9000	9991	1954	Male	2023-10-07	2024-03-15	...
8d23023	9000	demo centre 9000	9992	1973-11-30	Female	2024-03-10	2024-03-22	...

Image 20, the patient registry overview page (data editors view)

Patient registry overview page

Patient registry overview page shows:

1. The patient registry title. Users without editing rights (e.g. with data viewer role) will see **Read only** sign next to it, reinforcing the functionality available to them (see image 21).
2. The buttons to set up/apply filtering of the patient list (see [Filters](#)).
3. **Add patient** button to add or create a new Patient in the EBMT Registry (see [Add Patient](#)). This button is not visible to Data viewers.



Short ID	Registration CIC	Registration centre name	UPN	Date of birth	Sex at birth	Date of last event	Last modified	
19c337a	1234	General test	14537	2020-04-29	Female	2024-05-11	2024-06-26	...
5b521e0	2071	demo centre 2071	2071	1960-07-20	Male	2020-05-01	2023-07-31	...
0e2ef67	2094	demo centre 2094	57899	1960-07-20	Male	2024-06-07	2024-06-12	...
bbbed78	9000	demo centre 9000	37487	1968-07-15	Female	2023-02-05	2024-07-04	...

Image 21. the patient registry overview page (data viewers view)

4. The list of registered patients (in the chosen user context) with their data summary. The information in the Patient registry overview page is presented in the table 2, where each row corresponds to a separate patient, and columns provide the following details:

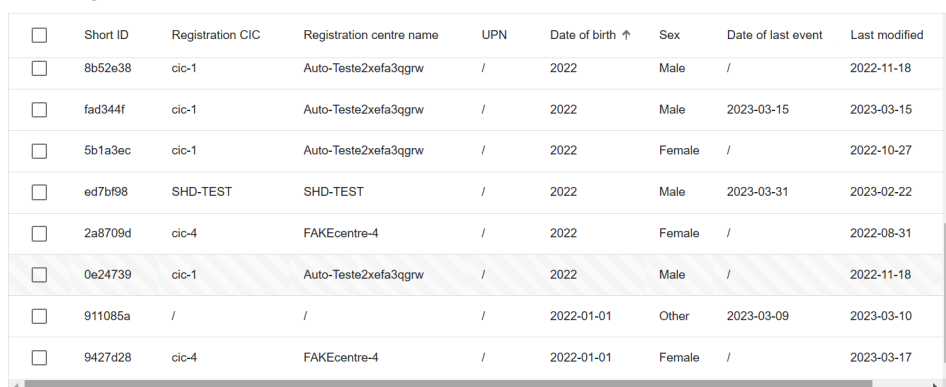
Column name	Column can be used for sorting	Description
Short ID	Yes	EBMT patient short ID.
Registration centre CIC	Yes	The CIC of the centre that registered the patient in the EBMT Registry.

Column name	Column can be used for sorting	Description
Registration centre name	Yes	The name of the centre that registered the patient in the EBMT Registry.
UPN	Yes	<ul style="list-style-type: none"> If the context is a VR - the UPN for the registration centre is shown. If the context is a centre - the UPN for the context centre is shown.
Date of birth	Yes	Patient date of birth as per Patient registration data.
Sex at birth	Yes	Patient sex at birth as per Patient registration data.
Date of last event	No	Date of the last registered event for this patient (the event with the most recent date). The event that is shown last (to the right) in the Patient timeline.
Last modified	No	Date the latest changes were done to any of the patient data/events.

Table 2, items in the patient registry overview

5. [Pagination](#) section.

[Tentative patients](#) are marked in the patient overview list, the line that corresponds to a tentative patient is greyed-out (Image 22) and visible to data editors and administrators.



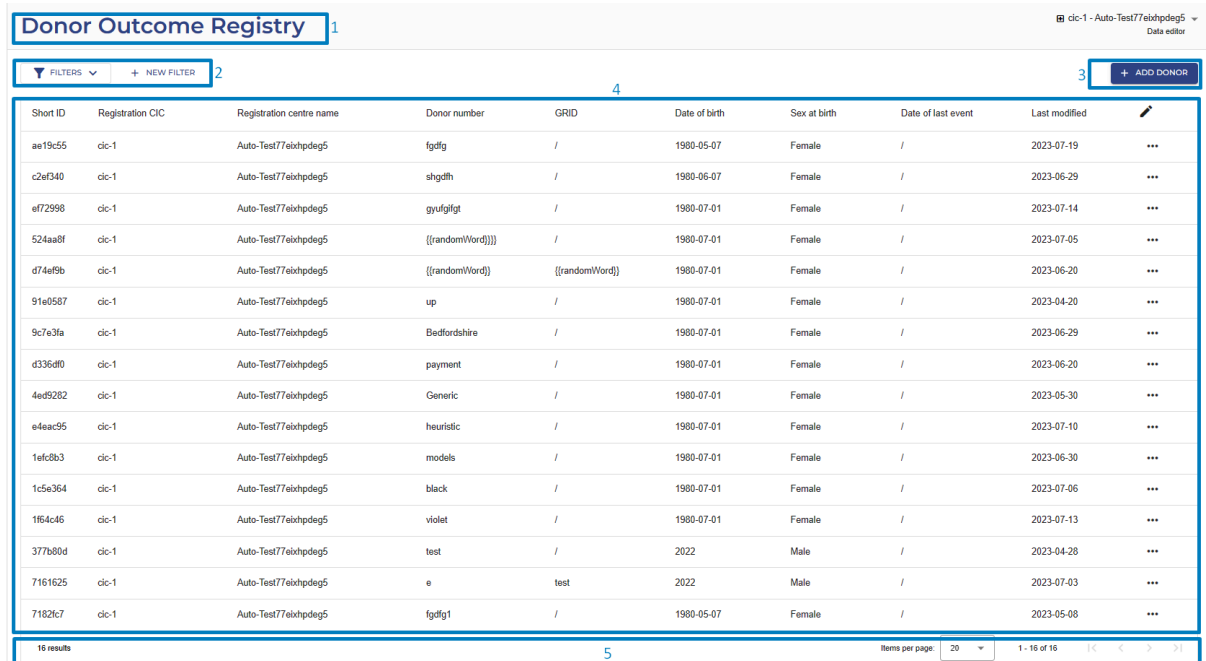
<input type="checkbox"/>	Short ID	Registration CIC	Registration centre name	UPN	Date of birth ↑	Sex	Date of last event	Last modified
<input type="checkbox"/>	8b52e38	cic-1	Auto-Teste2xefa3qgrw	/	2022	Male	/	2022-11-18
<input type="checkbox"/>	fad344f	cic-1	Auto-Teste2xefa3qgrw	/	2022	Male	2023-03-15	2023-03-15
<input type="checkbox"/>	5b1a3ec	cic-1	Auto-Teste2xefa3qgrw	/	2022	Female	/	2022-10-27
<input type="checkbox"/>	ed7bf98	SHD-TEST	SHD-TEST	/	2022	Male	2023-03-31	2023-02-22
<input type="checkbox"/>	2a8709d	cic-4	FAKEcentre-4	/	2022	Female	/	2022-08-31
<input type="checkbox"/>	0e24739	cic-1	Auto-Teste2xefa3qgrw	/	2022	Male	/	2022-11-18
<input type="checkbox"/>	911085a	/	/	/	2022-01-01	Other	2023-03-09	2023-03-10
<input type="checkbox"/>	9427d28	cic-4	FAKEcentre-4	/	2022-01-01	Female	/	2023-03-17

Image 22, Patient registry overview: registered patients versus tentative patients

The details on patient specific page layout and content are explained in the [Patient page](#) section.

Donor outcome registry

The donor outcome registry is part of the EBMT Registry that contains information on [donors](#) registered in the EBMT Registry and associated with these donors [events](#).



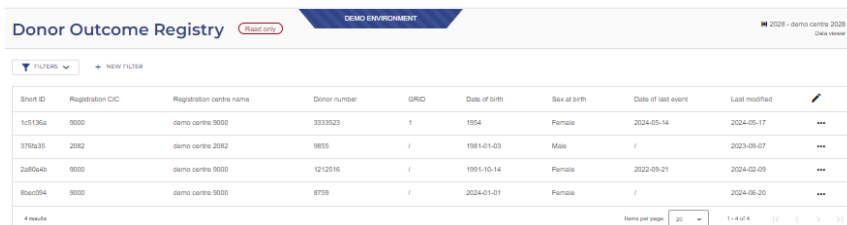
Short ID	Registration CIC	Registration centre name	Donor number	GRID	Date of birth	Sex at birth	Date of last event	Last modified	
ae19c55	cic-1	Auto-Test77eixhpdeg5	fgdfg	/	1980-05-07	Female	/	2023-07-19	...
c2ef340	cic-1	Auto-Test77eixhpdeg5	shgdfh	/	1980-06-07	Female	/	2023-06-29	...
ef72998	cic-1	Auto-Test77eixhpdeg5	gyufgfgt	/	1980-07-01	Female	/	2023-07-14	...
524aa8f	cic-1	Auto-Test77eixhpdeg5	{{randomWord}}]	/	1980-07-01	Female	/	2023-07-05	...
d74ef9b	cic-1	Auto-Test77eixhpdeg5	{{randomWord}}	{{randomWord}}	1980-07-01	Female	/	2023-06-20	...
91e0587	cic-1	Auto-Test77eixhpdeg5	up	/	1980-07-01	Female	/	2023-04-20	...
9c7e3fa	cic-1	Auto-Test77eixhpdeg5	Bedfordshire	/	1980-07-01	Female	/	2023-06-29	...
d336d0	cic-1	Auto-Test77eixhpdeg5	payment	/	1980-07-01	Female	/	2023-06-20	...
4ed9282	cic-1	Auto-Test77eixhpdeg5	Generic	/	1980-07-01	Female	/	2023-05-30	...
e4eac95	cic-1	Auto-Test77eixhpdeg5	heuristic	/	1980-07-01	Female	/	2023-07-10	...
1efc8b3	cic-1	Auto-Test77eixhpdeg5	models	/	1980-07-01	Female	/	2023-06-30	...
1c5e364	cic-1	Auto-Test77eixhpdeg5	black	/	1980-07-01	Female	/	2023-07-06	...
1f64c46	cic-1	Auto-Test77eixhpdeg5	violet	/	1980-07-01	Female	/	2023-07-13	...
377b00d	cic-1	Auto-Test77eixhpdeg5	test	/	2022	Male	/	2023-04-28	...
7161625	cic-1	Auto-Test77eixhpdeg5	e	test	2022	Male	/	2023-07-03	...
7182fc7	cic-1	Auto-Test77eixhpdeg5	fgdfg1	/	1980-05-07	Female	/	2023-05-08	...

Image 23, donor outcome registry overview page (data editors view)

Donor outcome registry overview page

Donor outcome registry overview page shows:

1. The donor outcome registry title. Users without editing rights (e.g. with data viewer role) will see **Read only** sign next to it, reinforcing the functionality available to them.
2. The buttons to set up/apply filtering of the donor list (see [Filters](#)).
3. The *Add donor* button to add or create a new [Donor](#) in the EBMT Registry (see [Add Donor](#)). This button is not visible for data viewers.



Short ID	Registration CIC	Registration centre name	Donor number	GRID	Date of birth	Sex at birth	Date of last event	Last modified	
1c5136a	9000	demo centre 9000	3333323	1	1954	Female	2024-05-14	2024-05-17	...
376b035	2082	demo centre 2082	9855	/	1981-01-03	Male	/	2023-09-07	...
2a80a4b	9000	demo centre 9000	1212516	/	1991-10-14	Female	2022-09-21	2024-02-09	...
8bac094	9000	demo centre 9000	8759	/	2024-01-01	Female	/	2024-06-20	...

Image 24, the donor outcome registry overview page (data viewers view)

4. The list of registered donors (in the user context) with their data summary. The information in the Donor outcome registry overview page is presented in the table, where each row corresponds to a separate donor, and columns provide the following details:

Column name	Column can be used for sorting	Description
Short ID	Yes	EBMT donor short ID

Column name	Column can be used for sorting	Description
Registration centre CIC	Yes	The CIC of the centre that registered the donor in the EBMT Registry.
Registration centre name	Yes	The name of the centre that registered the donor in the EBMT Registry.
Donor ID	Yes	Donor ID given to a donor by the collection centre or centre responsible for follow-up.
GRID	Yes	GRID
Date of birth	Yes	Donor date of birth as per Donor registration data.
Sex at birth	Yes	Donor sex at birth as per Donor registration data.
Date of last event	No	Date of the last registered event for this donor (the event with the most recent date). The event that is shown last (to the right) in the Donor timeline.
Last modified	No	Date the latest changes were done to any of the donor data/events.

Table 3, items in the in the donor outcome registry overview

5. [Pagination](#) section.

Anonymous events for non-consenting patients

If the patient did not give their consent to share their data with the EBMT, it means that only minimal essential data on the performed treatment can be entered into the EBMT Registry according to instructions available on the [EBMT website](#).

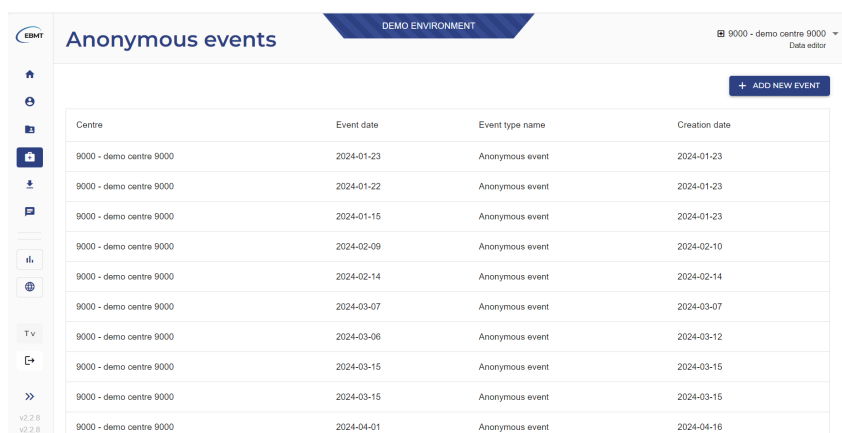
Anonymous events - is the term used to define the scope of data concerning the centre's activities related to non-consenting patients.

Important: In the current version of the application, the anonymous events are visible only to users in a centre context or Centre-based VR context.

Anonymous events overview page

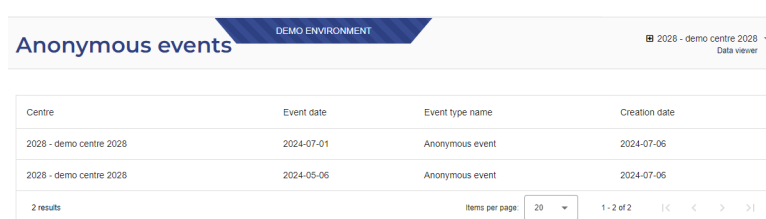
The anonymous events overview page (see image 25) can be open through the [Navigation menu](#) and it contains:

1. The title: anonymous events.
2. The list of registered anonymous events (in the user [context](#)) with their data summary.
3. The button *Add new event* to add or create a new anonymous event in the EBMT Registry (see [Add anonymous event](#)). This button is hidden for data viewers (see image 26).
4. [Pagination](#) section.



Centre	Event date	Event type name	Creation date
9000 - demo centre 9000	2024-01-23	Anonymous event	2024-01-23
9000 - demo centre 9000	2024-01-22	Anonymous event	2024-01-23
9000 - demo centre 9000	2024-01-15	Anonymous event	2024-01-23
9000 - demo centre 9000	2024-02-09	Anonymous event	2024-02-10
9000 - demo centre 9000	2024-02-14	Anonymous event	2024-02-14
9000 - demo centre 9000	2024-03-07	Anonymous event	2024-03-07
9000 - demo centre 9000	2024-03-06	Anonymous event	2024-03-12
9000 - demo centre 9000	2024-03-15	Anonymous event	2024-03-15
9000 - demo centre 9000	2024-03-15	Anonymous event	2024-03-15
9000 - demo centre 9000	2024-04-01	Anonymous event	2024-04-16

Image 25, anonymous events overview page (data editors view)



Centre	Event date	Event type name	Creation date
2028 - demo centre 2028	2024-07-01	Anonymous event	2024-07-06
2028 - demo centre 2028	2024-05-06	Anonymous event	2024-07-06

Image 26, anonymous events overview page (data viewers view)

The information in the anonymous events overview page is presented in table 4, with each row corresponding to a separate anonymous event and columns providing the following details:

Column name	Description
Centre	The centre that registered treatment for a non-consenting patient.
Event date	The date specified by the used as event date
Event type name	Name of the event form used. Users will be able to see the form version in this column.
Creation date	The date the anonymous event was created in the EBMT Registry to report minimal essential data for a non-consenting patient.

Table 4, columns in the anonymous events overview and their descriptions

Anonymous event

Anonymous events are records, created in the EBMT Registry to report the centre's activities concerning non-consenting patients and they include the following information:

- diagnosis: date, classification, subclassification;
- treatment: year, type, chronological order (sequence) of this type of treatment for this patient;
- cell source: autogenic or allogeneic.

Each anonymous event has a unique identifier (7 digits) automatically created by the EBMT Registry.

The anonymous event page contains the following information:

1. Anonymous event unique identifier;

2. Anonymous event summary section. It also contains buttons *Save changes* to save changes (if changes were made to the saved form) and *Print* button to print the current anonymous event form.
3. Anonymous event data fields.

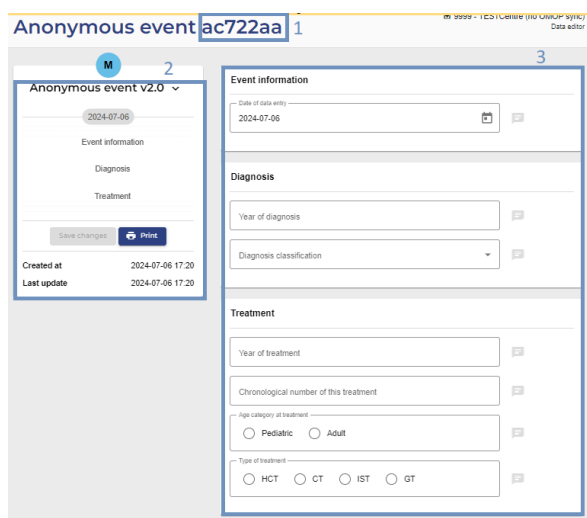


Image 27, an anonymous event page

Note: CBVR can view the anonymous events of their member centres.

Important: If a patient was registered in the EBMT Registry but withdrew their consent and requested their data to be removed from the EBMT Registry, the data is removed completely and is not automatically transferred into Anonymous events. From this point, the patient is considered a non-consenting patient. A centre should report the minimum essential data for this patient via an anonymous event.

Anonymous events export

Note: the export of anonymous events data is to be added in one of upcoming versions of the EBMT Registry. This functionality will be explained in further versions of this manual.

Exports

[Export of anonymous events data](#) can be done via EBMT Registry built-in export functionality.

Data extraction from EBMT Registry patients registry and donor outcome registry is currently done via MicroStrategy analytical tool. Please refer to the [MicroStrategy user manual](#) for more details.

Data export - is a process of extracting (copying) data from the EBMT Registry and saving it in one of the requested formats.

Export - is the file created by the system that contains anonymous events data from the EBMT Registry. Anonymous events data is not stored in the analytical database, thus it cannot be extracted via MicroStrategy analytical tool. It is only stored in the EBMT Registry application database and can be extracted through the EBMT Registry application export functional

Once EBMT Registry generates the export file for anonymous events, it is stored in the server for 7 days and is available for download from the EBMT Registry only to the user who requested its creation. After 7 days the file expires and cannot be downloaded. If a new export with the same information is required after the expiration date, the request can be created again through the Anonymous events overview page.

Export file status

Data export requests may have the following status:

Export status	Description
Requested	The user requested data export, the export file creation has not started and is awaiting the system to pick up this request. The export is not ready to be downloaded yet.
Ready	The data export request was successfully processed. The export file is created and ready to be downloaded.
Expired	The export file is expired and is not available for download any more.
Error	The data export request failed. It was not possible to create the export file.

Table 5, Export file statuses with descriptions

Note: data export requests may fail and show Error status due to various reasons. In case of error, It is recommended to repeat the attempt. If a user keeps experiencing this problem, they should contact the Registry helpdesk providing all the details of the case, including the details on the scope of data they tried to export.

Export security

Important: data exported from the EBMT Registry (including MicroStrategy reports/dossiers/tables) contain sensitive patient and/or donor data, and thus must be protected from unauthorised access and/or use by taking appropriate security measures.

It is expected that, among other security measures, Users will ensure that:

1. Data export files are downloaded, located and stored in an encrypted local disk on their devices.
2. The dedicated directory will not back up automatically to any Cloud storage facility or external drive.
3. All data export files are deleted promptly, once Users finish working with them.

All users of the EBMT Registry must comply with the EBMT Registry Conditions of Use, Data Protections laws in existence in each individual country, and the General Data Protection Regulations (GDPR 2016/679). Please visit the EBMT website for more information on [Data privacy](#) and the EBMT Registry Conditions of Use.

Data queries

Query or **Data query** - is a conversation between a data editor and data monitor or query manager initiated by a data monitor/query manager and related to a specific field in a patient or donor event in the EBMT Registry. It is important that all data editors and all data monitors/query managers with access to

the specific patient can take part in this conversation. Data viewers with access to the specific patient can view the query conversation but can not participate in it.

Data monitors/query managers can review patients' events, in particular specific questions (data fields) and **open a query**, which means start a conversation with data editors on a specific field; data query status becomes **Open**.

Once data monitor(s)/query managers receive required feedback from data editor(s), they will **resolve a query** (in other words, close a query), which marks that the issue is resolved; data query status becomes **Resolved**.

A query cannot be reopened, past queries, regardless of their status (open or resolved) remain visible on the field. Multiple data queries may be open per field at the same time.

Data queries can be accessed through the query overview page (Data queries in the [Navigation menu](#)) or through an event form (query icon next to each data field).

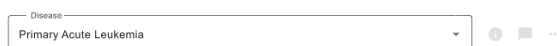


Data query icons next to a data field	Meaning
	There is no query on this data field.
	There is an open query on this data field. The conversation between the data monitor/query manager and data editor started and has not finished yet.
	There is a resolved (closed) data query on this field.

Table 6, data query icons and their descriptions

Practical example: query may be used by data monitors/query managers in various ways, including but not limited to the following:

- to call attention of a data editor to any inconsistency with entered field value;
- to call extra attention of a data editor that the information is missing in the field;
- to point out that there is an error and request correction of it;
- to request correction of the value if entered information does not correspond to source document (see SDV below);
- to request some extra information, required for the verification check.

Queries are visible to all users that have access to the patient record: data viewers, data editors, data monitors, query managers (including query manager and editor), administrators. But the functionality related to queries depend on the user role (see table 7).

Functionality	Data monitor/query manager	Data editor	Data viewer
Open query	Yes	No	No
Answer query	Yes	Yes	No
Close query	Yes	No	No
See open query	Yes	Yes	Yes

Table 7, data query functionality per user role

1

Data queries

DEMO ENVIRONMENT

9000 - demo centre 9000

Data editor

2

Patients

Donors

Studies

3

Patient short ID	Registration centre CIC	Event type	Field	Initiator	Last responder	Initiated on	Updated at	Status
f17153c	9000	Cellular therapy	Date of collection	4e17568	9ed61ab	2024-03-15	2024-03-15	Open
7b1ad76	9000	HCT Day 100	Date of follow-up	4e17568	4e17568	2024-02-07	2024-02-07	Resolved
7b1ad76	9000	HCT Day 100	Date of follow-up	3f95172	4e17568	2024-01-24	2024-03-15	Open
8d23023	9000	Status at HCT/CT/IST	Date of HCT/CT/IST	You	You	2023-11-21	2024-02-19	Open
d243b88	9000	Myeloproliferative Neoplasm	Date of diagnosis	You	4e17568	2023-11-14	2024-02-07	Resolved

5 results

4

Items per page: 20

1 - 5 of 5

|< < > >|

Image 28, the data query overview page

Data queries overview page

The data queries overview page can be open through the [Navigation menu](#) and it contains:

1. The page title: Data queries.
2. Patient / Donor / Studies tabs: to indicate whether the user wishes to view queries related to [patients](#), [donors](#) or study specific forms in their selected [context](#).

Note: the tab for studies is only visible once study-related functionality is fully implemented in the EBMT Registry.

3. The list of [queries](#) related to patients/donors in the user [context](#). The information is presented in the table, with each row corresponding to a separate query, and columns providing the following details:

Column name	Description
Patient short ID	EBMT short patient ID, relating to the data field for whom the query was opened.
Registration centre CIC	The CIC of the centre, that registered the patient, in relation to whose data field the query was opened.
Event type	The event the query refers to.
Field	The name of the data field the query refers to.
Initiator	User's ID, who initiated (opened) the query.
Last responder	User's ID, who last responded to the query message.
Initiated on	The date the query was opened.
Updated at	The date the last message was sent in the query or the date its status was updated, whichever happened last.
Status	The status of the query: <i>open</i> or <i>resolved</i> .

Table 8, items in the query overview

Users can click anywhere in the row and open the corresponding data query window (see image 29), read the conversation, and see if the value of the field was updated during the conversation. They can also see the information as to what data field this data query refers to. In one of upcoming versions of the EBMT Registry this window will also contain a link to open the event form with the data field the data query refers to.

Note: Multiple queries may be open for the same data field. This means that in the data query overview page, each query will be shown as a different line.

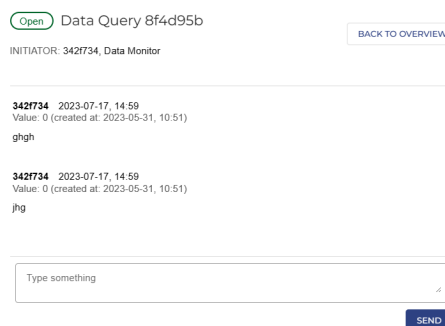


Image29, a data query window

When opening a query from the patient or donor [event form](#), the user will have to choose what query to enter (see image 30). It is possible to view and enter both open and resolved queries.

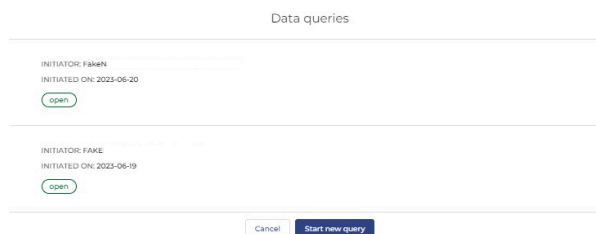


Image 30, a window to select data queries related to one data field

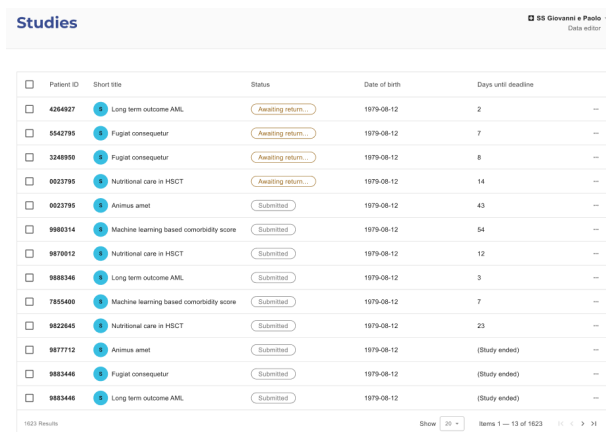
Studies

One of the purposes of the EBMT Registry is to provide a pool of data to EBMT members to perform studies. The studies are carried out by the dedicated EBMT staff who work for one of the EBMT working parties. For some of these studies used the data collected via the core and/or extended dataset is sufficient, however for some studies additional data collection is required (see [Study-related event forms](#)).

In the past, such study-related data collection was carried outside the main EBMT data collection tool (ProMISe), using Excel sheets or PDF forms.

From the EBMT Registry version 2.3.4 and onwards, EBMT will start gradually moving to study data collection within the EBMT Registry. New functionalities and improvements related to this section of the system will be added and explained in more details once available.

Studies overview page



Patient ID	Short title	Status	Date of birth	Days until deadline
4264927	Long term outcome AML	Awaiting return...	1979-08-12	2
5542795	Fungal consequator	Awaiting return...	1979-08-12	7
3248959	Fungal consequator	Awaiting return...	1979-08-12	8
0023795	Nutritional care in HSCT	Awaiting return...	1979-08-12	14
0023795	Asinus amet	Submitted	1979-08-12	43
9980314	Machine learning based comorbidity score	Submitted	1979-08-12	54
9870912	Nutritional care in HSCT	Submitted	1979-08-12	12
9888346	Long term outcome AML	Submitted	1979-08-12	3
7855409	Machine learning based comorbidity score	Submitted	1979-08-12	7
9822845	Nutritional care in HSCT	Submitted	1979-08-12	23
9877712	Asinus amet	Submitted	1979-08-12	(Study ended)
9883446	Fungal consequator	Submitted	1979-08-12	(Study ended)
9883446	Long term outcome AML	Submitted	1979-08-12	(Study ended)

Image 31, design of the studies overview page (the screenshot will be added to the manual once the functionality is fully implemented)

Studies overview page will show:

1. The title: Studies.
2. The list of study-related event forms for patients taking part in the EBMT studies (in the chosen user context) with their data summary. The information in the Studies overview page is presented in the table below, where each row corresponds to a separate study-related event, and columns provide the following details:

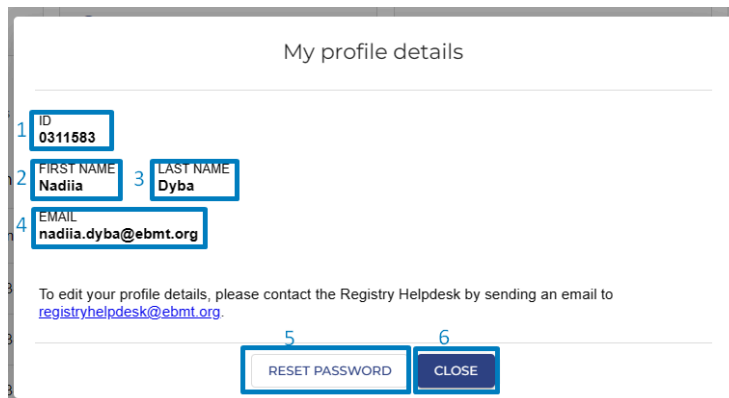
Column name	Description
ID	EBMT patient ID.
Short title	EBMT study name (short title)
Status	Status of the study-related event form: if it is awaiting data submission or data has been submitted already.
Date of birth	Patient date of birth as per Patient registration data.
Days until deadline	The number of days left until the deadline for submitting study-related data. If the study phase to submit the data has passed, it is marked as (Study ended).

Table 9, items in the studies overview

3. [Pagination](#) section.

User profile

Users can access and view their profile information by clicking the button with their name and surname (when the navigation menu is in full mode) or initials (when the navigation menu is in compact view) from the navigation menu to call the *My profile details* modal window.



My profile details

1 ID 0311583

2 FIRST NAME Nadiia 3 LAST NAME Dyba

4 EMAIL nadiia.dyba@ebmt.org

To edit your profile details, please contact the Registry Helpdesk by sending an email to registryhelpdesk@ebmt.org.

5 RESET PASSWORD 6 CLOSE

Image 32, My profile details modal window

The *My profile details* modal window appears on top of any previously opened section of the EBMT Registry. It shows the following information:

1. [User's ID](#) - ID number automatically assigned to the user in the EBMT Registry.
2. User's first name.
3. User's last name (surname).
4. User's email address, used for registration in the EBMT Registry.
5. Button *Reset password* - used to request a password reset.
6. Button *Close* - used to close *My profile details* modal window.

A user cannot change any information displayed in the *My profile details* modal window. If changes are required to the user's first or last name, the user can contact EBMT Registry helpdesk by email.

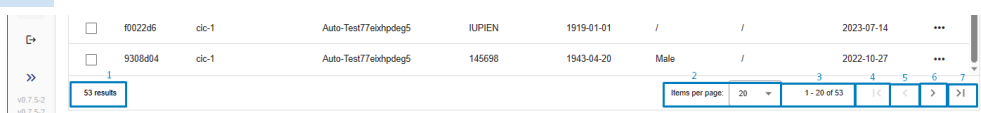
Note: User email addresses cannot be changed. If a previous email becomes unavailable, the user should contact EBMT Registry helpdesk to deactivate the previous user account and submit a properly signed and filled *EBMT Registry User Account Request form* with the updated email so that the new user account can be set up.

Pagination

Main screens that show a long list of items with big datasets (like Patient registry overview, Donor outcomes registry overview, Data queries overview, etc.) will include pagination at the bottom of the main screen to navigate through the list of available items.

The EBMT Registry uses an offset pagination method to manage large datasets and display them on a webpage. It is a method to split a large amount of data into smaller, more manageable chunks. With offset pagination, only a portion of the data is loaded at a time, making the web page load faster and reducing the load on the system.

In the current version of the EBMT Registry (due to offset pagination) the system loads up to 1,000 items (10 pages of up to 100 items) at a time. This can be changed without prior notice to adjust system performance.



<input type="checkbox"/> 1002246 <input type="checkbox"/> 9308d04	cic-1 cic-1	Auto-Test77eivhpdeg5 Auto-Test77eivhpdeg5	IUPIEN 145698	1919-01-01 1943-04-20	/ Male	/ 2022-10-27
53 results							
Items per page: 20 1 - 20 of 53 1 < > >1							

Image 33, footer showing the pagination

In case of large datasets when only some items were loaded, the system will perform the calculation of the number of filtered results with set up time out in order not to slow down the interface and system performance. In case the number of filtered results is too high and the system could not calculate it within a few seconds time out, unknown or # sign will be displayed instead of the exact number.



Image 34, footer showing the pagination with unknown number of results in the overview page

The pagination section includes:

1. The total number of items in the overview list (equivalent to the number of table rows).

The system will calculate this number over 1 second, and display where possible. Please be aware that very big datasets may not show the total number of items to ensure it does not decrease the general system performance.

2. The number of items (table rows) shown per page. There is also a dropdown for the user to choose whether to show 5, 10, 15, 20 or 100 items per page.

3. Indication as to what rows are currently being shown on the main screen (e.g. 1-100 of 1,000 represents that out of over 1,000 items in the database, items 1 to 100 are currently being shown).

4. Button to go to the first page of the list of loaded items.
5. Button to go to the previous page with the list of items.
6. Button to go to the next page with the list of items.
7. Button to go to the last page with the list of loaded items.

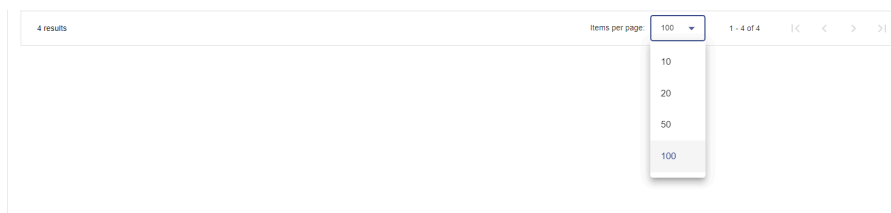


Image 35, dropdown to view more patients per page

Sorting

Main screens showing tables with datasets also offer users sorting functionality for some columns. Sorting allows the user to organise and view data more meaningfully: in ascending or descending order based on a specific column.

Ascending order:

- If sorting a column of numbers, the smallest number appears first, followed by larger numbers;
- If sorting a column of text, the values are arranged alphabetically, with the first letter of the alphabet appearing first, followed by subsequent letters;
- If sorting dates, the earliest date appears first, followed by later dates.

Descending order is the opposite of ascending order.




Sorting icon	Description
	Ascending order icon is not highlighted to mark that the sorting is not used for this column.
	Ascending order icon is highlighted to mark that the sorting is applied for this column. The items in this column are shown in ascending order.
	Descending order icon is highlighted to mark that the sorting is applied for this column. The items in this column are shown in descending order.

Table 10, icons for sorting columns in the EBMT Registry

It is important to note that sorting is not available for all table columns. Users can hover their mouse/cursor over the column header. If one of the sorting icons appears, this column can be used for sorting.

Note: sorting is done within the whole list of items in the EBMT Registry database (not only within a loaded chunk of data as per offset pagination).

Filters

The EBMT Registry has various filtering options that allow users to filter the large datasets within their context to find the required data, narrow down the search, or define the list of patients or donors that meet certain filter criteria.

There are two types of filters in the EBMT Registry:

- System filters;
- Personal filters

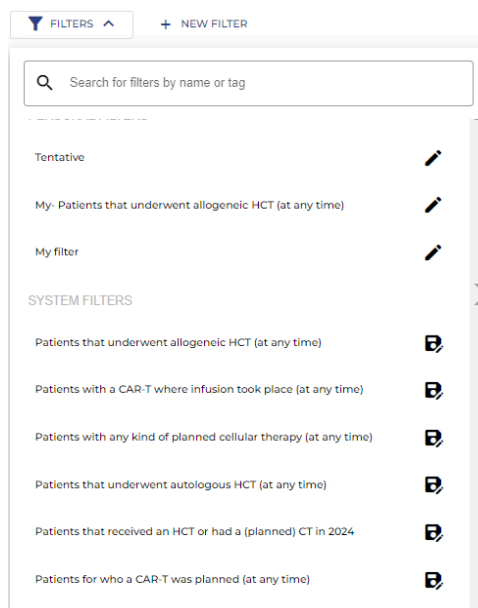


Image 36, example of a list of personal and system filters

System filters

System filters are the same for all users of the EBMT Registry. They are set up in order to facilitate everyday operation of the users, based on their needs. The list of system filters may change with the new editions of the EBMT Registry.

System filters are configured by EBMT separately for Patients Registry and for Donors outcome registry and may be applied to the patients or donors overview lists. Users may use system filters for filtering or use them as a template to edit and create their own personal filters.

It is not possible for users to edit any system filter. Users may save system filters as their personal filter and then edit it as needed (see [Save system filter as personal filter](#)).

Personal filters

Personal filters are user-specific filters. They may be [created](#) and applied by a specific user to filter the list of items in the user context. Users can also [save their filter](#), if they wish to keep it and/or use it again in the future. Any saved personal filter can also be [edited](#) or deleted by the user, if the filter is no longer relevant for the user.

Users can create their own personal filter in the following ways:

- Enter all the filtering criteria manually from scratch;
- Open a saved personal filter and modify it.
- Save system filter as personal filter and modify it further if needed.

It is possible to save personal filters with tags, in order to find them easier. A user may enter a tag or filter name in the search field to find the filter in the filter list.

Filter results - is the list of items received after applying all criteria defined in the filter. Suppose the initial filter results do not fully meet the user's needs. In that case, the user can refine or modify the filter: adjust the criteria, remove some existing criteria or add new criteria to narrow down the

displayed list further. The user can also remove the applied filter to return to an unfiltered list of items, which is the complete list of patients or donors in their context.

Filter criteria

Filter criteria are the rules used to narrow the search results. E.g., If a user wants to filter data only to show patients born in a specific period.

To define the filter criteria, a user must specify three key components: parameter, condition and value (see image below).



Image 37, example of a filter criteria (includes parameter, condition and value)

Parameter

A filter parameter is the data field from an event a user wants to search for in the database.

Filters can be applied to various data fields thus filter parameters can be related to:

- Patient/Donor (data fields related to the patient/donor registration form e.g. Blood group, Sex at birth, etc.); or
- [Patient events/Donor events](#): user also specifies the filter criteria that is related to what event type category and to what exact event (the Data Collection Form).

Since patients may have repeated events (e.g. multiple auto-HCT), it is also possible to narrow the search and specify whether it refers to the First event type, Last event type or Any event type (Image 38).

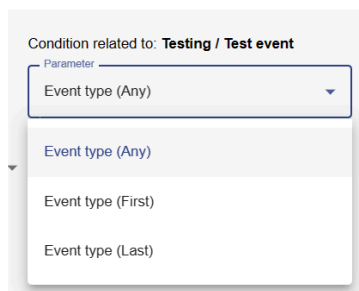


Image 38, event type - Any, First, Last

Parameters are grouped based on the event form, where they are reported. Thus, to find a parameter, users should follow the logic below:

1. Specify the category of a patient event (DCF) and select if it is related to:
 - Patient (patient registration data);
 - Diagnosis;
 - Treatment;
 - Follow-up.

When filtering donors users should specify if the condition is related to Donor (donor registration data) or donor follow-up.

2. Choose the event form (DCF) that contains the data field which is the filtering parameter.
3. Select the parameter from the dropdown list or enter it (if it is text field).

Condition

A filter condition is the type of comparison a user sets up. The list of conditions used for parameters that are dates differ from those used for other parameters (see table 11)

Condition used for dates	Condition used for numerical values or items from a dropdown list, radio button groups or checkbox fields
Equal to Not equal to Before Before or equal to After After or equal to Is empty Is not empty Is not evaluated Is ongoing Is unknown	Equal to Not equal to Is empty Is not empty Is not evaluated Is ongoing Is unknown

Table 11 conditions used in EBMT Registry depending on the type of parameter it refers to

See table 12 below for the list of conditions used in the EBMT Registry with some examples.

Condition	Example
Equal to	Tentative (patient) equal to true.
Not equal to	Blood Group not equal to B
Greater than	Age (at treatment) is greater than 30
Greater than or equal to	Age (at treatment) is greater than or equals to 30
Less than	Age (at diagnosis) is less than 70
Less than or equal to	Age (at diagnosis) is less than or equals to 70
Is after	Treatment year is after 2000
Is before	Treatment year is before 2020

Table 12, filter conditions and examples

Value

Value is the reference value of the data field.

See table 13 below for the types of data field values used in the EBMT Registry with some examples.

Data field value type	Example
Date	<div> <div>Parameter*</div> <div>Date of this HCT</div> </div> <div> <div>Condition*</div> <div>before</div> </div> <div> <div>Value*</div> <div>2100-01-01</div> </div>
Number	<div> <div>Parameter*</div> <div>Chronological number of this main tre...</div> </div> <div> <div>Condition*</div> <div>equal to</div> </div> <div> <div>Value*</div> <div>2</div> </div>
Answer options (radio buttons or checkboxes in a data field)	<div> <div>Parameter*</div> <div>Survival status at graft therapy</div> </div> <div> <div>Condition*</div> <div>equal to</div> </div> <div> <div>Value*</div> <div> <div>Alive</div> <div>Died after conditioning but before main ...</div> </div> </div>
Text	<div> <div>Parameter*</div> <div>Initials first name</div> </div> <div> <div>Condition*</div> <div>equal to</div> </div> <div> <div>Value*</div> <div>F</div> </div>

Table 13, filter values and examples

Note: filtering value must be exact match to the data field value. Partial match is not included into the filter results. Text field values are not case sensitive thus both upper or lower case can be used.

Complex filters

Users can filter the list of patients or donors within their context based on a number of **filter criteria** to search for patients/donors, create a filtered list of patients or work with it at their own discretion. Filtering of the patient/donor list may be based on many criteria, which may be grouped into **filter groups** for user convenience. It is possible to use either statement AND or statement OR inside each group of criteria (see example below).

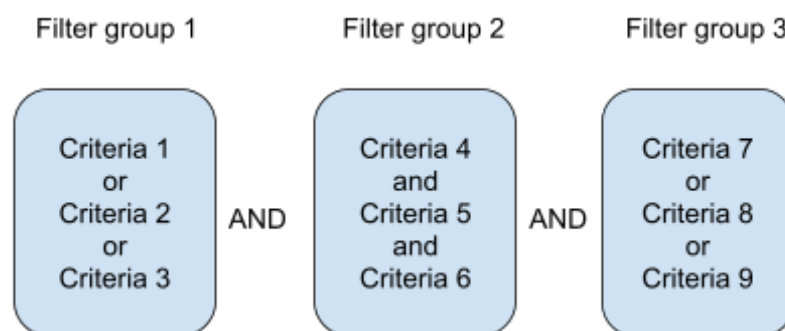


Image 39, example of a filter with 'and' groups

The statement between groups of criteria is always the same and is either AND or OR. It cannot be a combination of both (see example above and below).

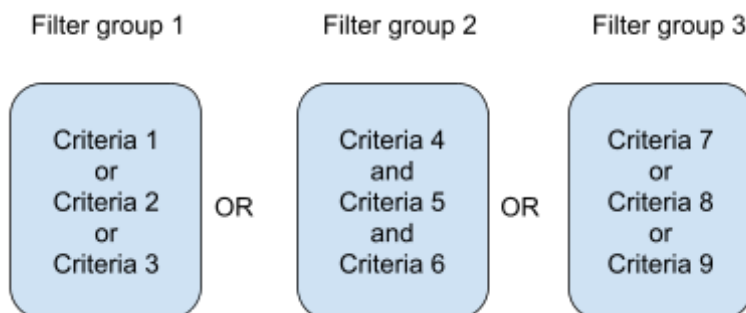


Image 40, example of a filter with 'or' groups

By default, the statement AND is always shown, but the statement can be changed at any time while setting the filter both inside the group and between groups.

Create a population filter

Bloodgroup equal to B

+ Add condition

AND Condition related to: **Diagnosis / Plasma Cell Disorders (PCD) Incl. Multiple Myeloma (MM)**

Parameter Event type (Any) Condition Equals Condition Plasma Cell Disorders (PCD) Incl. ...

AND Parameter* Date of diagnosis Condition* before Value* 2016-01-01

+ Add condition

AND ADD CONDITION, RELATED TO...

+ Patient + Treatment + Diagnosis + Follow-up + Testing

AND OR

Condition related to: **Patient**

Parameter* Date of birth Condition* before Value* 2016 Month Day

AND Parameter* Sex at birth Condition* equal to Value* Male

Cancel Reset APPLY

Image 41, example of a complex filter in the EBMT Registry

Patient/Donor page

All patients and donors registered in the EBMT Registry have their own page. The table below lists sections and explains the structure of each patient and donor specific page.

	Patient page	Donor page
1	Hyperlink PATIENT REGISTRY used to come back to the Patient registry overview page .	Hyperlink DONOR OUTCOME REGISTRY used to come back to the Donor outcome registry overview page .
2	EBMT patient short ID is always shown in the header.	EBMT donor short ID is always shown in the header.
3	Patient menu	Donor menu
4	Patient details summary	Donor details summary
5	Timeline	
6	Add new event button - not visible for data viewers.	
7	Event form - the most recent event form the timeline is loaded by default.	
8	Event form summary for the loaded event form.	

Table 14, sections in the patient and/or donor pages

1 PATIENT REGISTRY / DEMO ENVIRONMENT

2 Patient bbbed78 3 9000 - demo centre 9000 Data editor

4

EBMT short ID	Event date	Reg. centre CIC	Initials	Date of birth	Sex at birth	UPN	ProMiSe ID
bbbed78	2023-02-05	9000	M O	1968-07-15	Female	9998	/

5 2018 2 F + ADD NEW EVENT 6

8

HCT Day 100 2023-02-05 Demo Environment Day 100 Follow up Patient information Best Response Recovery (ANC) Recovery (Platelet reconstitution) Save changes Print Created at 2023-09-05 22:24 Last update 2024-03-15 11:31

Indication diagnosis for this HCT - Classification MDS Indication diagnosis: MDS Myelodysplastic Syndrome - 2018-10-01 Transplant type follow up is reported for Autologous HCT Transplant type: Autologous HCT Autologous HCT - 2022-11-17

Best Response Best clinical/biological response after HCT Continued complete remission (CCR) Date best response first observed 2023-02-04

Image 42, patient page

1 DONOR OUTCOME REGISTRY / DEMO ENVIRONMENT

2 Donor 4d3e18b 3 9000 - demo centre 9000 Data editor

4

EBMT short ID	Event date	Reg. centre CIC	Initials	Date of birth	Sex at birth	Donor number	ProMiSe ID	GRID
4d3e18b	2024-06-01	9000	j p	2021-02-01	Male	2222222	/	3553000060433201632

5 2023 F + ADD NEW EVENT 6

7

Donor outcome - Long ter... 2024-06-01 Demo Environment Donor status at follow-up Collection centre identification Product Complications (SAE/SAR) since last report - H... Complications (SAE/SAR) since last report - N... Save changes Print Created at 2023-12-01 10:44 Last update 2024-06-10 12:03

Donor status at follow-up Date of this follow-up 2024-06-01 Donor status at date of this report Alive Lost to follow-up Dead

Collection centre identification EBMT Centre Identification Code (CIC) If known Collection centre Donor registry Unrelated donors only

Image 43, Donor page

Additionally, the patient and donor page may display the notes icon (see image 44). This icon is only shown for patients or donors with registered notes. Whenever the notes for the patient or donor are empty (deleted), the notes icon is hidden automatically.

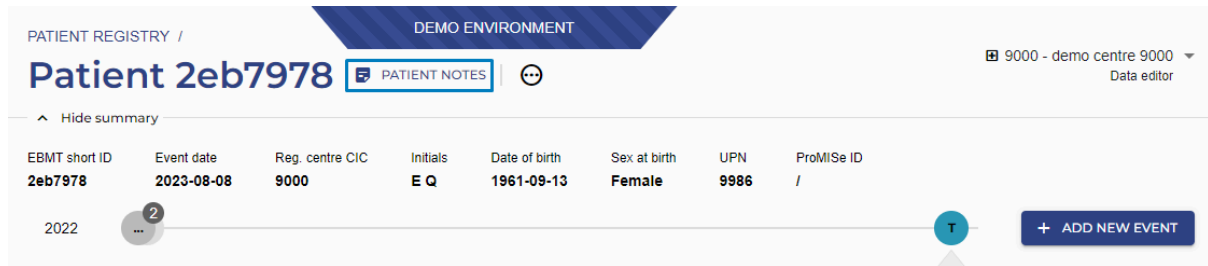


Image 44, example of a patient page with notes

Important note: the information entered into patient/donor notes is a free text that is not part of the core dataset, and it is the responsibility of the centre to ensure no sensitive or confidential information is stored there. Notes can be accessed only via the EBMT Registry application interface, data from Notes is not stored in the analytical database. Thus, it is not possible to export data from patient/donor notes.

Tentative patient page

Tentative patient pages are marked to call data editor and administrator users attention to the tentative status (image 45):

- there is a word warning next to the patient menu stating *Pending verification*;
- all the top part of the main screen except event form and event form summary is greyed out.

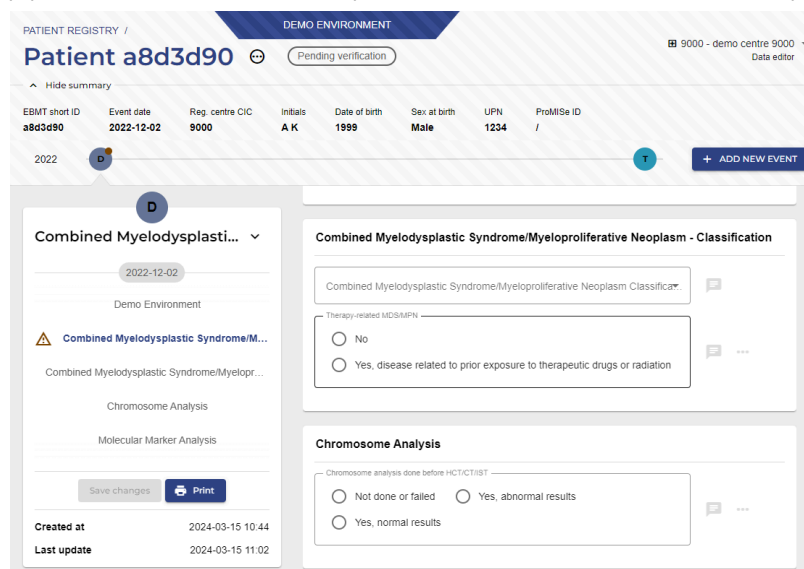


Image 45, example of a tentative patient page

Remember: Only data editors and administrators can see Tentative patient(s) in the system. This means that Data viewers and Monitors/Query managers cannot open Tentative patient pages.

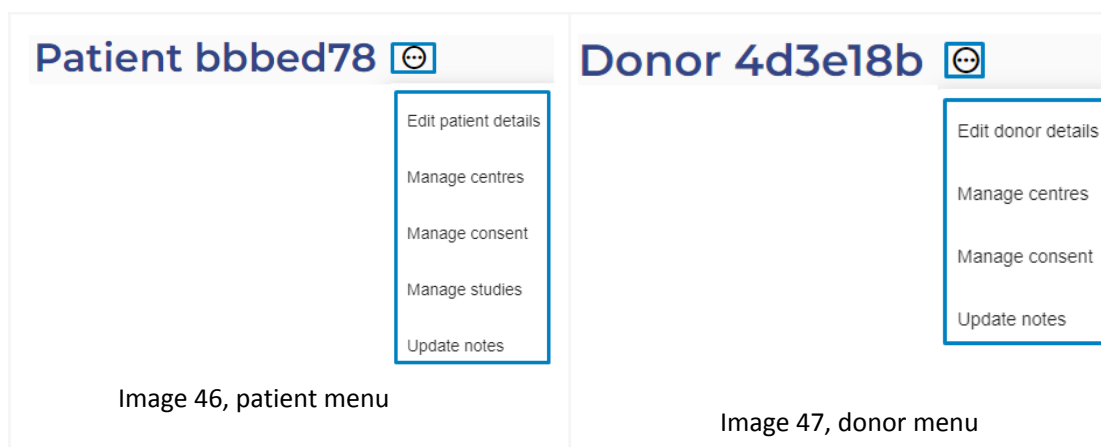
Patient/Donor menu

The **Patient/Donor menu** may be opened with the three dots button next to the Patient short ID (image 46) or Donor short ID (image 47). It is used to edit or update patient/donor registration information,

consent, information on studies, update notes. The functionality available for a user role is always highlighted. The functionality that is not available to a user is greyed out.

Patient/Donor menu includes the following items:

- **Edit patient details** section includes information about EBMT patient ID and the patient registration data (initials, date of birth, sex at birth, blood group, rhesus factor, etc.), where it can be updated, if required (see [Edit patient details](#)). **Edit donor details section** includes information about EBMT donor ID and the donor registration data (initials, date of birth, GRID, sex at birth, etc.), where it can be updated, if required (see [Edit donor details](#)).
- **Manage centres** section allows to view what centres are linked to the patient or donor and to [update patient UPN/donor ID](#), if required.
- **Manage consent** section includes information on the date of initial patient or donor consent and the latest informed consent signed as well as responses to all consent-related questions (see [Edit patient consent](#) and [Edit donor consent](#)).
- **Manage studies** section includes information on both non-EBMT and EBMT studies the patient is involved in. This section is not shown for donors in the current version of the system.
- **Update notes** section is used to edit or view any comments for this patient or donor. Comments are captured as a free text and are not part of core dataset, it is often used by centres/VRs users for their internal notes.



Patient menu item/User role	Data viewer /Monitor/ Query manager+viewer	Data editor	Administrator
Edit patient details	Read only	Editable	Editable
Manage centres	Read only	Read only for linking centres Editable to update UPN	Editable
Manage consent	Read only	Editable	Editable
Manage studies	Read only	Editable	Editable
Update notes	Read only	Editable	Editable

Table 15, items in the patient menu and users' editing or read only rights

Donor menu item/User role	Data viewer /Monitor/ Query manager+viewer	Data editor	Administrator
Edit donor details	Read only	Editable	Editable
Manage centres	Read only	Read only for linking centres Editable to update Donor ID	Editable
Manage consent	Read only	Editable	Editable
Update notes	Read only	Editable	Editable

Table 16, items in the donor menu and users' editing or read only rights

Patient/Donor summary

Patient/Donor summary is a section showing summary information about the patient/donor to provide users with some contextual details about the patient/donor while they are viewing events information. The content of this section may slightly change between the versions of the EBMT Registry application.

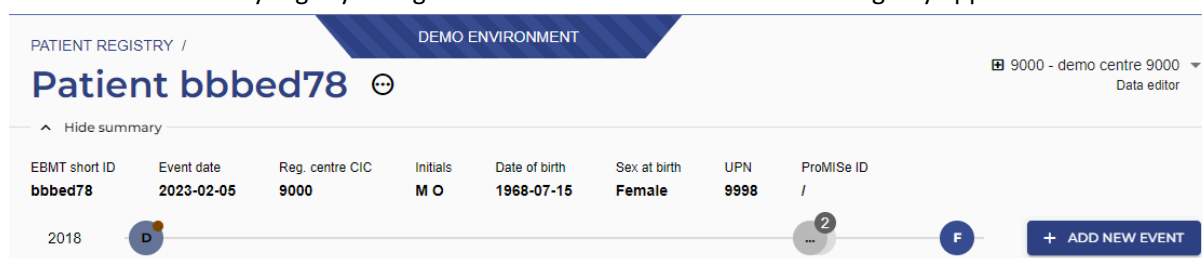


Image 48, patient summary full view

Patient/donor summary can be shown (in full view) as in image 48 or hidden as in image 49 to leave more screen space for the event form. *Hide summary* and *Show summary* are toggle buttons to switch between these two modes.

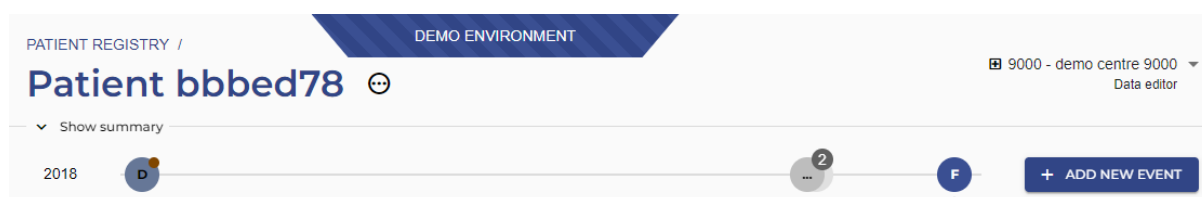



Image 49, patient summary hidden

Patient/Donor timeline

Patient and Donor timeline represents a summary of registered events for the particular patient or donor. Events are shown as coloured circles (see Image 48) in the timeline based on the registered event date (e.g. for patients: date of diagnosis, date of follow-up, etc.) in chronological order with earliest events shown on the left side and all subsequent events to the right. It allows users to see the entire registered medical history and intensity of patient/donor events over time at a glance.

Events may be grouped for patients with extended medical history. The groups of events are shown as a grey circle with the number of events it contains . Event forms with the same event date (e.g. Treatment and Disease status at HCT/CT/GT/IST) are always grouped in the current version of the EBMT Registry. User should click on the group circle to see the list of events it contains (see image below)

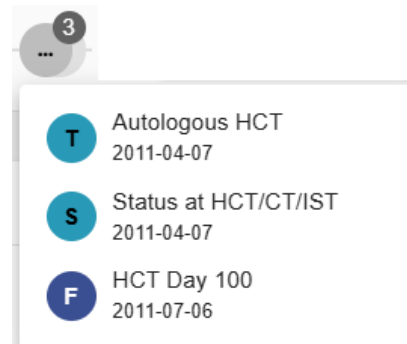


Image 50, example of a list of events shown upon clicking the event group in the timeline

When a user hovers the mouse over the event circle in a timeline, the user can see some summary information that includes:

1. Coloured circle representing an event with a letter(s) representing the category of the event (e.g. D for the diagnosis, T for treatment, F for Follow-up, etc).
S letter is used both for the Status at HCT/CT/GT/IST event and for study-related event forms (questionnaire), but the icons will appear with different colours to be easily distinguished.
2. Name of the event.
3. Date of the event.
4. The date when the event form was created in the EBMT Registry.
5. The date when the event form was last updated in the EBMT Registry.
6. How much time has passed since the event took place:
 - a. It is shown in months for events dated less than a year ago;
 - b. It is shown in full years for events dated over a year ago.

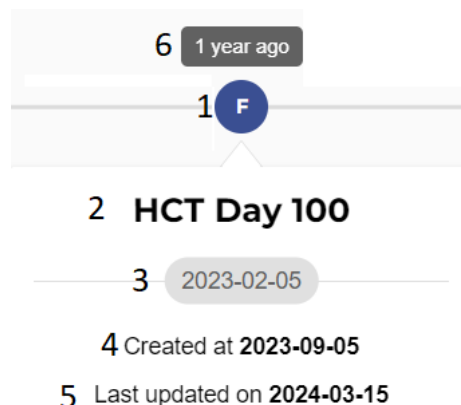


Image 51, example of a summary information of an event

Patient timeline enables users navigating between registered patients events by clicking on the events in the timeline (see [View Patient event](#)).

Note: further development in the patient timeline view and functionality are planned in the upcoming versions of the system.

Event form summary

Event form summary (event summary) is an area to the left of opened event form, that contains some summary information about the respective event form and important buttons for the event form management. It also allows navigating between event form sections.

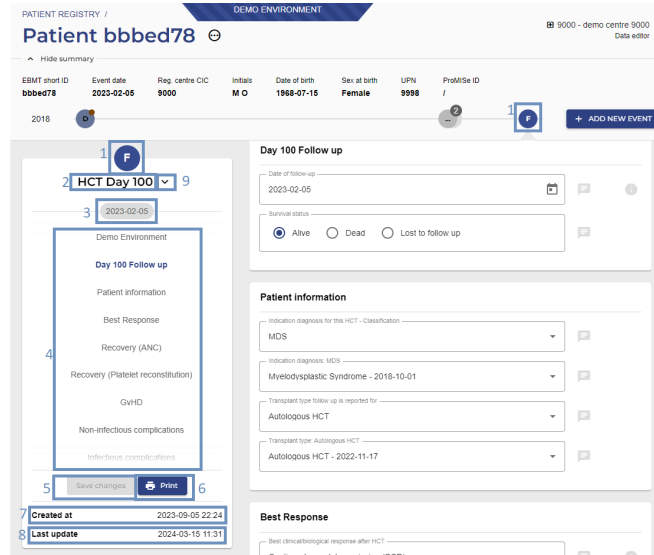


Image 52, example of an event form summary

It includes the following elements:

1. Event icon (coloured circle) representing an event with a letter specifying the event category (e.g. D for the diagnosis, T for treatment, F for follow-up, etc). It is equal to the one used in the Patient timeline.

Note: if an event form contains warning or error, the circle in the timeline (event icon) will also be marked with an error or warning dot. The event icon in the event form summary never contains any error or warning mark (see image below), since error/warning mark is shown next to the title of section it refers to.

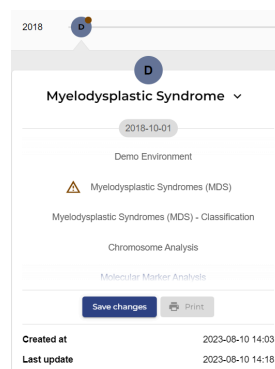


Image 53, event icon in a timeline and in an event summary

2. Name of the event.
3. Date of the event.

4. Titles of the sections from the event form.

The titles of sections from the event form are listed one under another as a list. When a user scrolls through an event form, the section currently displayed in the event form is shown as selected (highlighted in bold in the event form summary).

Every title of sections in the event form summary is clickable, it works similar to interactive content. Once a user hovers the mouse over the title of the section in event form summary - it becomes highlighted. Once a user clicks on it (selects), the title in the event form summary becomes highlighted and in bold and the corresponding section is being scrolled to and shown in the event form (see image below).

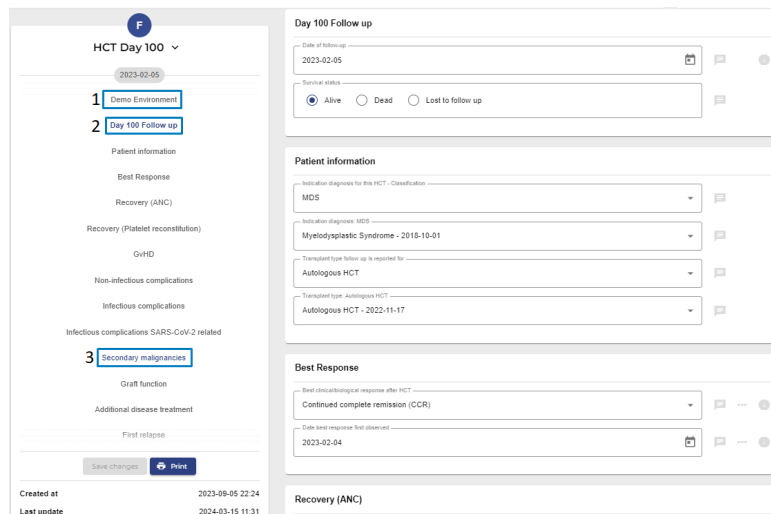


Image 54, event summary showing titles of sections: regular (1), selected/currently shown (2), highlighted upon hover (3)

If there are any field warning or error in any section of patient/donor event form, the corresponding icon will also be shown next to each title of the section (see [Field warnings](#) and [Field errors](#))

5. **Save changes** button

Save changes button may be shown in active or inactive mode as described in a table below



Button	Description
	Active <i>Save changes</i> button signifies that there were some changes done in the currently opened event form by data editor. If the user clicks the button, the changes will be saved to the database.
	Inactive <i>Save changes</i> button signifies that the user role does not allow editing event form and saving changes (e.g. data viewer); or there were no changes done in the currently opened event form by the data editor. Inactive button cannot be clicked.

Table 17, views of the save changes-button

6. **Print** button

Print button is used to create a printable version of the event form (see [Print event](#)).


7. Created at

It is the date and time when the loaded to the screen event form was created (registered) in the EBMT Registry by a data editor.

8. Last update

It is the date and time when the loaded to the screen version of the event form was last saved by an data editor in the EBMT Registry.

9. Event menu

Event menu can be called with the icon  which is to the right of the event form name. It is used to archive (delete) patient or donor events (see [Delete event](#)).

Event form

Event form corresponds to the Data Collection Form (DCF) of the respective event with some adjustments due to electronic format and EBMT Registry design. Patient and/or donor **event form** contains a series of data fields (questions). It provides a structured and organised way to capture and manage information that refers to the same event in a patient or donor timeline.

Tables, which are reports associated with repeated measurements that are similar for multiple items, are not used for the current version of the EBMT Registry. Thus the tables from the EBMT Data Collection Forms are represented with a group of questions.

Events are configured in the EBMT Registry in such a way that depending on answers given in some data fields, relevant sub-questions are shown ([visibility conditions](#)). There are also used buttons to add groups of questions (for example drugs, lines of treatments, etc.) in the EBMT Registry.

Data entry field (data field) is a designated space (field) where data can be input/viewed/edited. It is designed to capture a specific piece of information. More details on data fields can be found in the [Data entry](#) section.

Data fields are grouped by topic, similar to sections in the EBMT Data Collection Forms; in event forms this is visually represented as a group of fields displayed on the same white square background. Each section is displayed in a separate white square background.

There are usually-used titles for each section, which is also reflected in the event form summary.

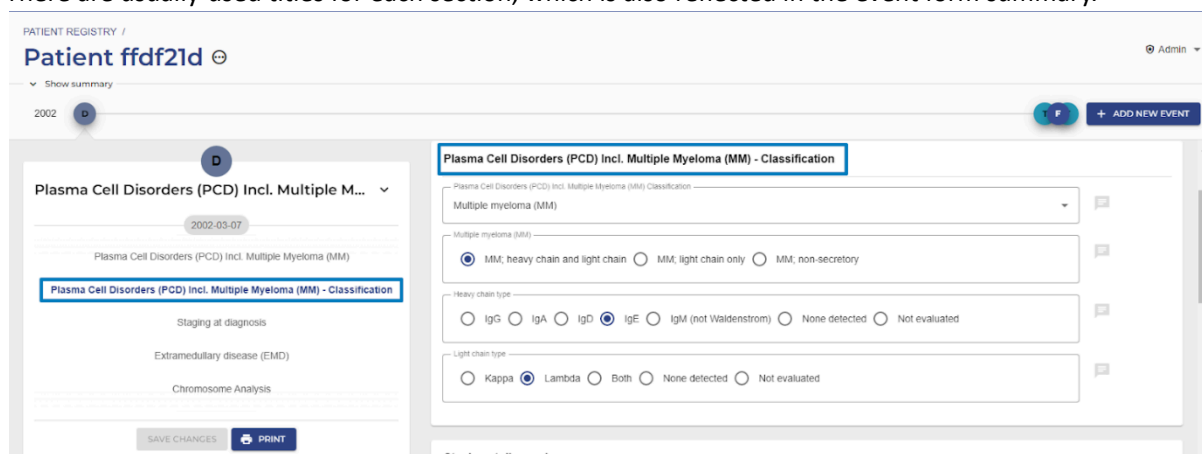


Image 55, data entry view with titles highlighted

Due to the high number of data fields within an event form, users need to scroll through the event form or use the event form summary to open the required section of the form.

Event forms are versioned, which means that the EBMT Registry keeps track of changes saved (e.g. user, who saved changes, date, time). It is recorded in the [audit trail](#).

When a user opens an event form, the EBMT Registry loads the latest saved version of this event form. Event form is displayed both for data editors and data viewers. Users without editing right will see the information, but it is greyed out to reinforce that it is in read-only mode.

Only users with editing rights are able to edit values, but all such changes remain purely visual until they are saved. Any changes are recorded and saved to the database only when a Data editor saves changes - clicks active *Save changes* button. The system will then create a new version of the form that will become the most recent event form version.

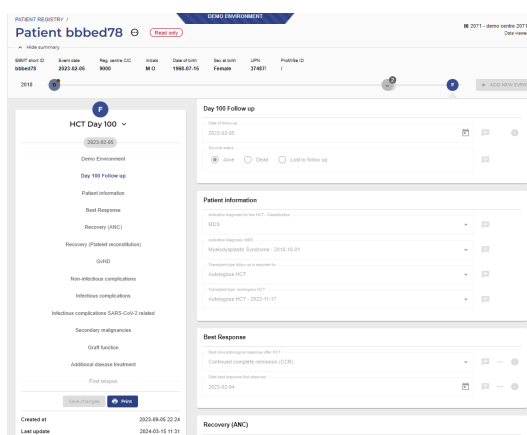


Image 56. Event form in read-only mode

Important: If the data editor leaves the event form without saving it or the [user session](#) expires, all unsaved entered data or changes will be lost and not recorded to the database or audit trail. Thus it is important to save changes done in the event form before a user:

- Navigates away from this particular event form (e.g. to other patient events or to other parts of the EBMT Registry);
- Leaves web browser tab with unsaved edited event form in the EBMT Registry;
- Closes web browser tab or web browser with unsaved edited event form in the EBMT Registry;
- Switches off computer;
- Leaves the EBMT Registry web page without activity for 20 minutes or more (see [User session](#)).

Event form versioning

Data collection process must be flexible to reflect the latest trends and changes in the treatments and diseases EBMT is collecting data. Data collection forms are regularly revised by EBMT experts and working parties, which leads to creation of new versions of DCFs and event forms as their equivalents in the EBMT Registry.

Once a new version of an event form is configured and published in the EBMT Registry - it becomes effective immediately and replaces its previous version (if any). Users cannot use the previous version of such event form to submit (register) new data, but they can open patient or donor event submitted at the time such version was active, edit/update active data fields, if needed.

The version of an event form is usually mentioned in the event name (see image 57)

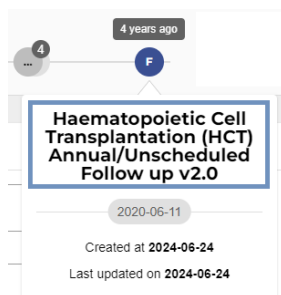


Image 57, example of an event form version specified in the event title

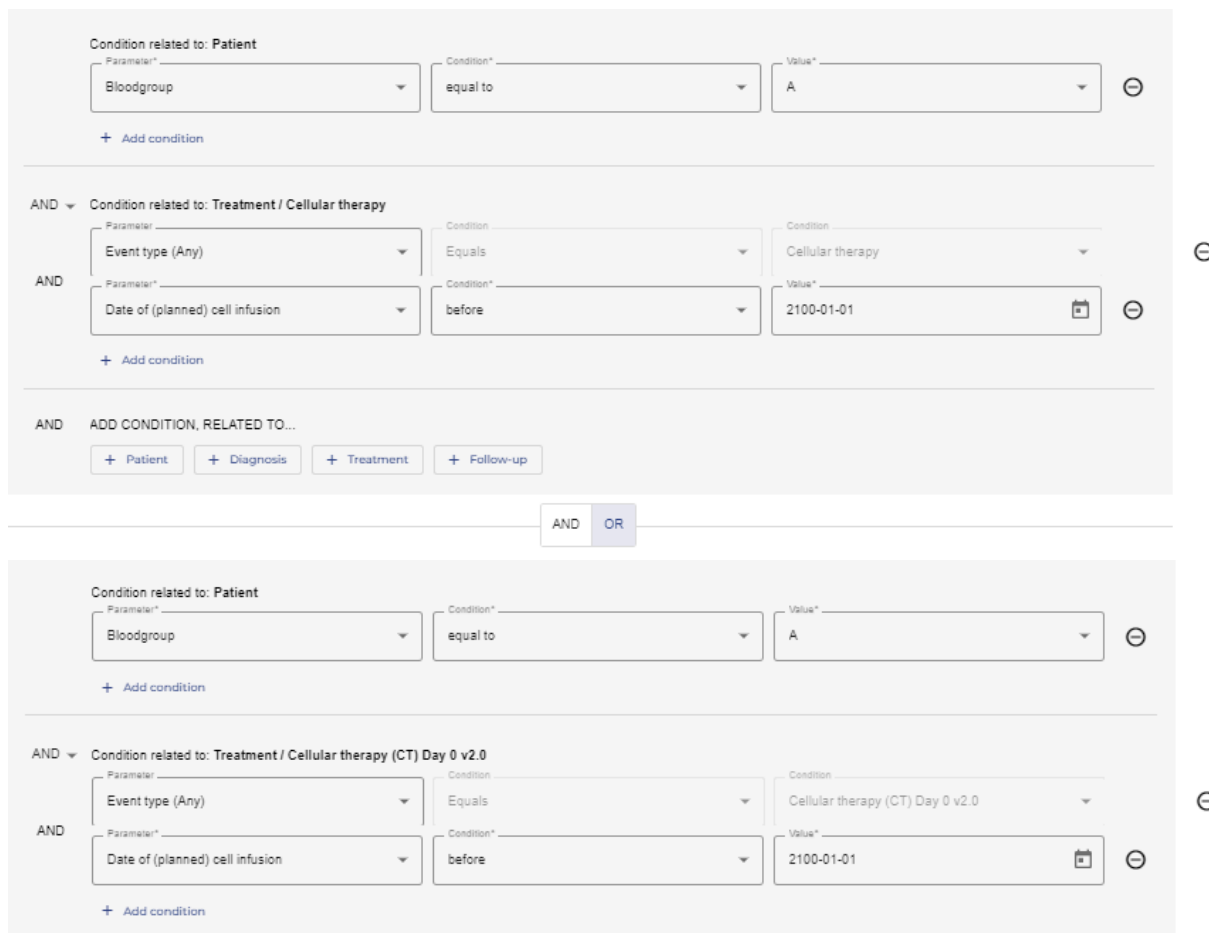


Image 58, example of a configured filter with form versions specified

Since content of event forms differs in various versions, it should be taken into account while working with exported data and in order to filter data in the EBMT Registry.

While filtering data, users should specify what versions of event form the filter should be applied to.

For example, to filter all patients with blood group A that underwent Cellular therapy treatment, the user should configure the filter with the following logic:

1. Patient has CT treatment reported (any date of treatment) in CT treatment form v.1 **and** patient blood group is A.
2. **OR**
3. Patient has CT treatment reported (any date of treatment) in CT treatment form v.2 **and** patient blood group is A.

When such a filter is configured in the EBMT Registry, it will look as appears in the image 58.

Possible editing conflict

If two or more users are opening any patient or donor event form at the same time or with 15 (fifteen) minutes difference, the EBMT Registry will show a [warning](#), notifying them about **possible editing conflicts**. It is important to note that if the same form is opened or edited by multiple users, the user that presses the *Save changes* button last will create the latest event form version; this means that data entered by other users will be lost and only the data as displayed on the main screen of this last user will be saved to the database. This is a crucial point to remember if multiple users open or edit the same form.

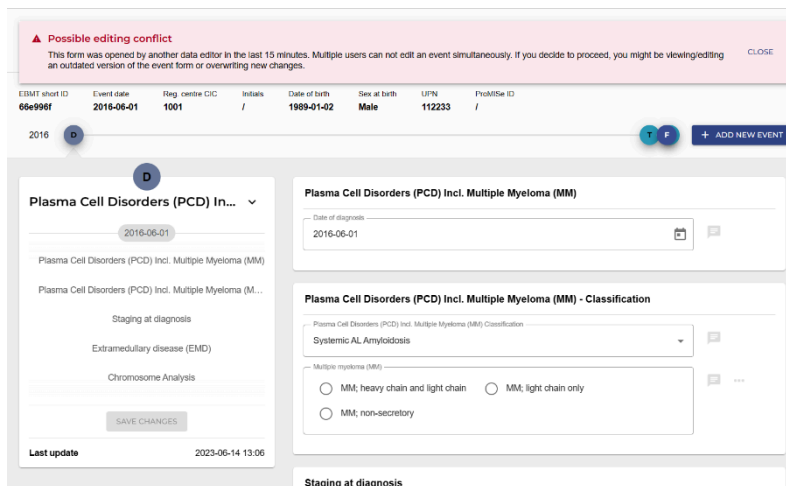


Image 59, the message shown in case of a possible editing conflict

Note: It is recommended that the users avoid situations of potential editing conflicts and return to such event records later.

Practical example:

- User A and User B open the same patient event form at the same time at 12:00 (or within 10 minutes of each other). The system shows a warning about a possible editing conflict. The event form is loaded on each user screen and looks exactly the same.
- User A enters data into data field 1, then presses the *Save changes* button at 12:11. The event form version 1.0 is created in the database.
- User B leaves data field 1 empty, enters data into data field 2 and data field 3, then presses the *Save changes* button at 12:15. The event version 2.0 replaces (overwrites) the event version 1.0 in the database.
- The information displayed on the User B screen will be captured in the database. The changes to data field 1 made by User A are lost, as version 1.0 has been overwritten by event version 2.0.
- Any user who enters this patient event form from 12:16 onwards will see that data field 1 is empty and data fields 2 and 3 are as entered by User B.

Hidden patient events

There are cases when patients event(s) should be temporarily hidden from other EBMT Registry users and be excluded for studies until a certain date.

It is expected in one of the upcoming versions of the EBMT Registry to allow assigning a special *Embargo status* to the patient to mark that the patient and all patient events data cannot be considered for studies. Once this feature is introduced, users with editing rights will be able to add and/or remove the Embargo status from their patient via the patient menu. It will also be possible to set up the date when this status is to be removed automatically from the patient in the EBMT Registry.

This functionality will be explained in more detail once it is available.

Study-related event forms

Besides regular event forms to record patient data (diagnosis, treatment, follow-up), patients enrolled into EBMT studies in their timeline will also be shown study-related events icons.

Study-related event forms contains a series of data fields (questions) to collect data required for studies.

This includes:

Study candidate search event forms, such form aims to collect data in order to select candidates for a study. This type of event forms are shown in the patient timeline as a smaller dot, comparing to other patient events.

Study event form (study questionnaire). This event form aims to collect data required for studies that is not included into regular patient events (core dataset).

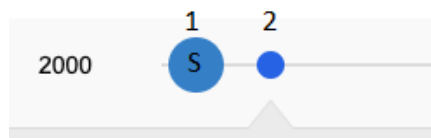


Image 60, study-related event form in a patient timeline: 1 study event form, 2 study candidate search form

Data entry field

Data entry field (data field) has the following elements:

1. **Label** describes in short what data should be provided in the data field. Label design differs slightly depending on the data entry field type.

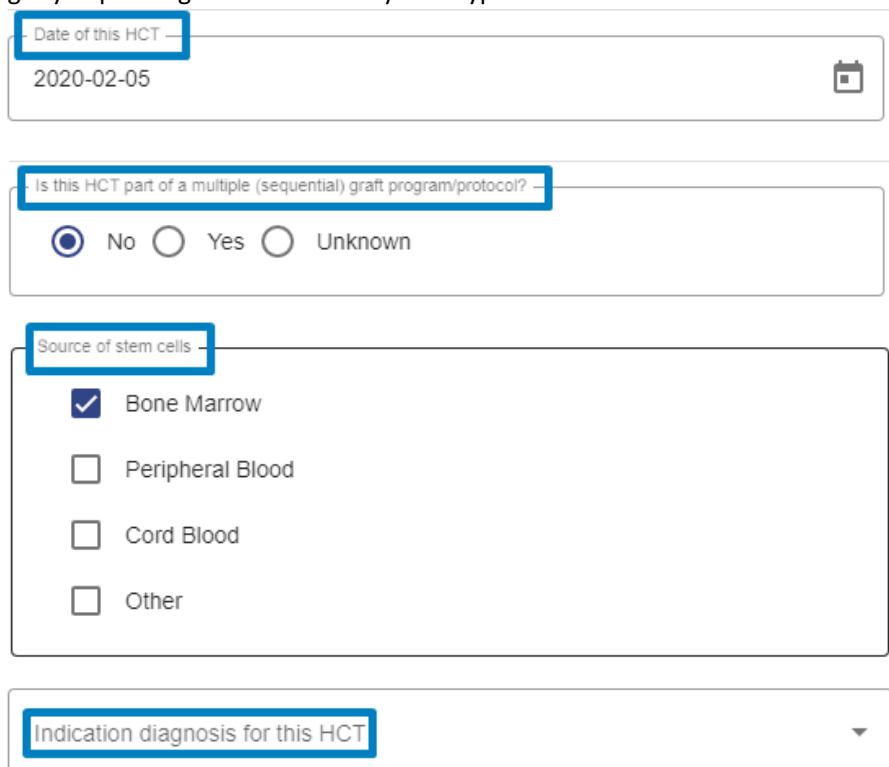


Image 61, labels in an event for data entry

2. Area to enter data or answer options to select from (see [Data entry field types](#))
3. Help **text** - some of the fields also have help text; it provides some extra details, such as the data to be entered into the data field.

The following icons may be shown to the right of a data entry field:

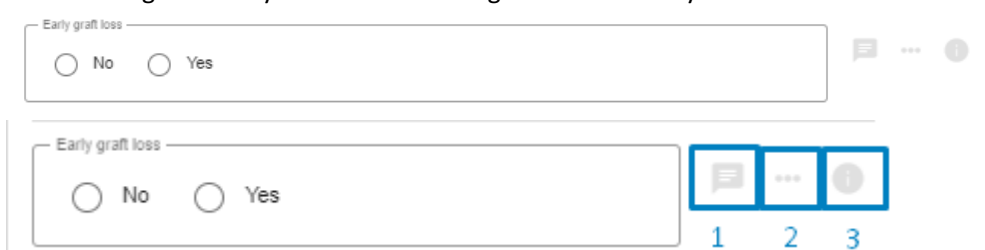


Image 62, items shown next to data entry fields

1. [Data query](#) icon.
2. Three dots icon to mark the data field menu, it is used to mark that the answer is [unknown/not evaluated](#).

Note: the data field menu icon is shown only for data fields, where it is possible to indicate [unknown, not evaluated and/or ongoing status](#). If the icon is not visible, this means that for this data field it is not possible to select any of these statuses.

3. Hint - help text that is not shown by default. It appears when a user hovers a mouse or cursor over the information icon to the right of the data field.



Image 63, example of a hint

Mandatory fields

Majority of data fields are considered to be mandatory for completion in the event form, a few may be optional. Optional fields are always marked. Data items should be filled in if specifically stated in the definition or in the Completion guidelines to the relevant DCF.

Some key data fields will also be configured to show a warning or error if they are left blank.

Unknown/Not evaluated/Ongoing status

For some data fields, it is possible to indicate that information is unknown or not evaluated, or the date is not known because the process was not finished (ongoing).


There is a three dots icon  to the right of some data entry fields to mark the data field menu (see image below). The data field menu is a dropdown that includes one or more options that vary depending on a data field, e.g. not evaluated, unknown, ongoing.



Image 64, marking a field as not evaluated or unknown

It is used when needed to state that information is not available and cannot be entered into the database, thus assigning this status to a data field. When a data editor selects an answer option from the data field menu, the field is marked with the respective status.



Image 65, example of how a not evaluated field looks like after selecting 'Not evaluated'

In case it was done by mistake or information becomes available at a later stage, data editors may remove such status from this data field:

- For fields previously marked as *Unknown*, data editor users can enter the field value and unknown status will be removed automatically, or they can remove this status through the data field menu, clicking *Mark as Normal*.



Image 66, removing the 'unknown' status

- For fields marked as *Not evaluated*, data editor users should open the data field menu and click *Mark as Normal* to remove the Not evaluated status and enable editing, and then enter field value if needed.



Image 67, removing the 'not evaluated' status

Ongoing status may be indicated for some date fields, as shown in the image below:



Image 68, ongoing status on a data entry field

Depending on a data entry field, ongoing may also be a regular answer option as shown in the image below:

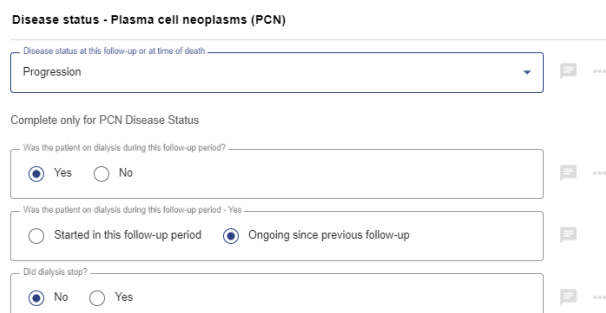


Image 69, ongoing as an answer option for a data entry field

Data fields visibility conditions

The data fields in the EBMT Registry event forms have strictly defined visibility conditions: depending on the answer given in one data field, only relevant dependant fields are shown to capture data; irrelevant data fields, based on established visibility conditions, are not visible and cannot contain any data. This ensures that every event form remains as compact as possible, the collected data does not contain contradictions and is properly structured.

In case a user changes the main field value, the list of dependent fields is automatically updated to show only relevant ones, any previously entered data into dependent fields that are not visible and not relevant any more is emptied. The user will be notified in this case, to ensure that the main field value is not changed by mistake and to avoid such mistake leading to data loss (see image 70)

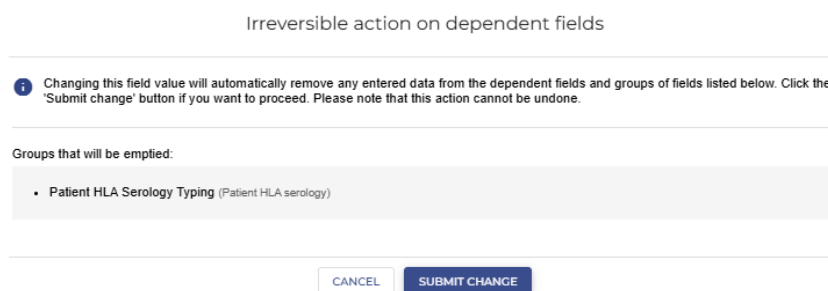


Image 70, example of a warning about removing data in dependant fields due to the main data field value change

Data entry field types

Below is the short summary and some details on data entry fields used for online data entry. There are different types of inputs used for data fields in the EBMT Registry.

1. Drop-down

Drop-down is mostly used for questions with more than three answer options. The answer options will appear after clicking the field. An option can be selected from the list. For long lists, please scroll to navigate through and see all the items. Some of the drop-down lists also have a search field. In this case, it is possible to type the text on the field and obtain suggestions from the list of options available.

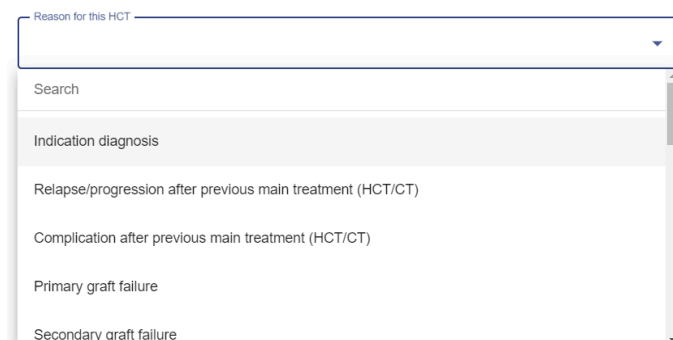
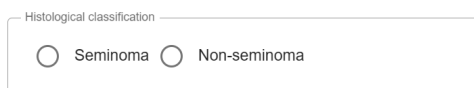


Image 71, example of a dropdown menu

2. Radio buttons

Radio buttons are used for questions where there are a few options available but only one option can be selected. The question can be filled in by clicking the dot before the answer.



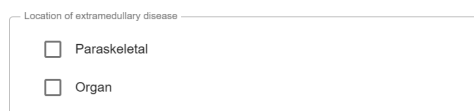
Histological classification

☐ Seminoma ☐ Non-seminoma

Image 72, example of radio buttons

3. Check-boxes

Check-boxes are used for questions where more than one option can be selected at the same time. Check-boxes can be selected and unselected, if needed.



Location of extramedullary disease

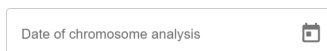
☐ Paraskelatal

☐ Organ

Image 73, example of check boxes

4. Dates

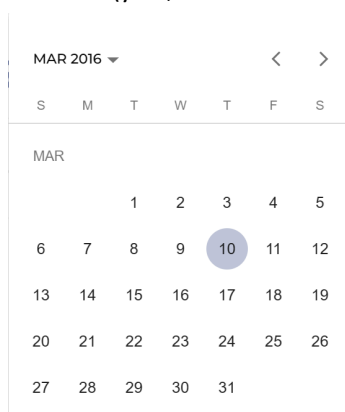
All dates in the EBMT Registry are in YYYY-MM-DD format, where YYYY represents 4 number digits of the year, MM - 2 number digits of the month, DD - 2 number digits for the day of the month. Date fields have calendar graphics on the right.



Date of chromosome analysis

Image 74, example of a date field

Users can enter the date manually by typing it in the format YYYY-MM-DD or click the calendar graphics to open the calendar window and select the date (year, month and date).



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< >

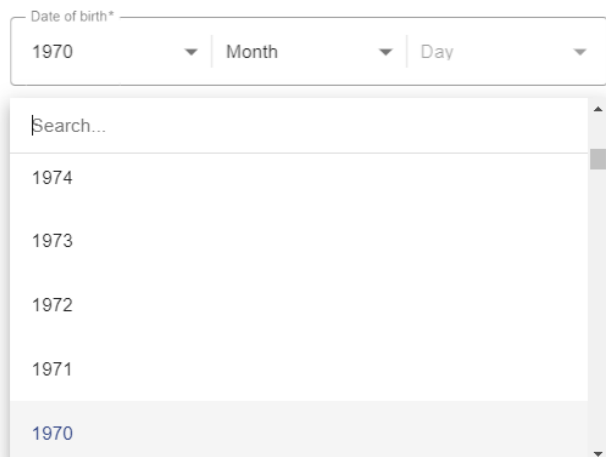
S	M	T	W	T	F	S
			1	2	3	4
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Image 75, calendar view after clicking the date field

It is not possible to mark the date reported as approximate in the current version of EBMT Registry, thus all dates are considered as exact dates. In case the exact day of the month is unknown, or day and month

is unknown, please follow the instructions as stated for the Introduction to the EBMT Registry Completion Guidelines available at the [EBMT website](#).

In rare cases, indicating a **partial date** (e.g. Patient date of birth) is possible. In this case, another date field format is used, allowing a user via separate dropdown to specify year only, or year and month, or year and month and day.



The image shows a date field labeled "Date of birth*". The field is split into three sections: "Year", "Month", and "Day". The "Year" section currently displays "1970". Below the field, a dropdown menu is open, showing a search bar and a list of years: 1974, 1973, 1972, 1971, and 1970. The year 1970 is highlighted at the bottom of the list.

Image 76, example for adding a partial date

5. Text

Text fields in the EBMT Registry accept both text and numbers. In case the field is aimed to enter a numerical value, there might be also set up [automatic data check](#) to make sure entered value is within expected range. Text boxes that specify Other answer options in the forms must only be used if no alternative from the dropdown or radio buttons is available. It is mandatory to answer in English, as other languages can create codification problems with letters not recognised by the system.



The image shows a text box field with the placeholder text "Other, specify".

Image 77, example of a text box field

6. Calculated fields

Calculated fields are quite rare and are used to perform calculations such as the exact age at the time of an event. These calculations are done based on the information entered into the database in previous forms. Calculated fields cannot be edited.




The image shows a calculated field labeled "Age at diagnosis". The field displays the value "60 years" and has a lock icon on the right side, indicating that the value is fixed and cannot be edited.

Image 78, example of a calculated field

If the value in the data field is shown wrongly, this can happen due to a mistake in the date of birth or date of the event registered in the EBMT Registry . Please check both data fields.

7. Remote field

Remote fields in the EBMT Registry are marked with the  icon, it is a data field (question) answered in the earlier submitted forms that is repeated in subsequent forms. This type of field is not available for editing. If the data editor notices that the data value is incorrect in the remote field, they need to find the form where it was initially entered (source field) and correct it.

Remote fields are shown with the following information:

1. Name of the data field (label).
2. Name of the event form where this data field was entered, followed by the date of the event.
3. Event field with its value.

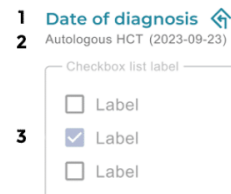


Image 79, Remote field


Repeating group of question

A repeating group of questions is a set of data entry fields (questions) that are repeated multiple times within a single data entry form (event form).

A button for *adding* the whole group of questions is often used in case it is not known the exact number of repetitions the user needs to report data. Such a button is placed at the end of the last added group of questions, it has **+ Add** at the beginning of its name.



Image 80, example of a repeating group of questions

The group of questions may also be removed (deleted) with the help of *remove* button icon  to the right from the group of questions title.

Important: Once the user deletes the group of questions, the data that was entered into there is deleted and this action is not reversible. That is why users are advised to be careful and check that there is no data to be lost by this action

For users convenience, each group of questions may be shown in full view or compact (collapsed) view in order to manage screen space. Users can use arrows (see table 18) to the left from the Repeated group name which are toggle buttons to switch between these views.






Image 81, collapsed and expanded questions in a repeating group

Icon	Description
^	Repeated group of questions is shown in full view, which means there are shown all its data entry fields and values, if any. Once a user presses this button, it switches to collapsed view.
v	Repeated group of questions is shown in a collapsed view, which means there is only the title of the group of questions. Data entry fields and their values, if any, are not visible to free more space for other data fields and information on the user screen. Once a user presses this button, it switches to full view.

Table 18, icons used in repeating groups of questions

Do not confuse:

- the  icon button deletes group of questions and entered into these fields data, while
- the  and/or  icon buttons are hiding/unhiding a group of questions on the user main screen (no data is deleted and it remains in the event form).

Inactive data entry fields

Some data entry fields may be set as inactive to mark that they are not relevant any more (deactivated) and data editors do not need to enter information into these fields. Nevertheless, all information already submitted in deactivated fields (when they were active) remains in the database and is shown in the patient/donor event form as legacy data (historical data).

Inactive data entry fields are not shown to users unless they contain some data.

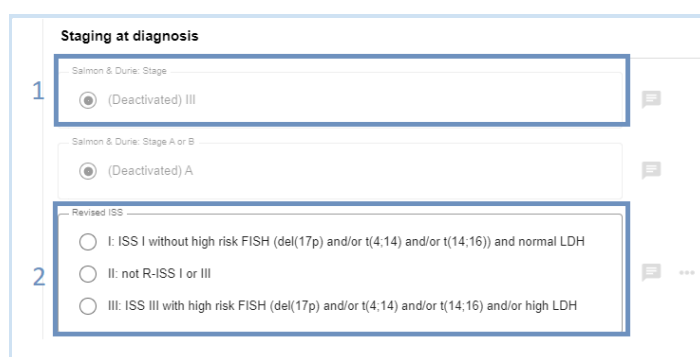


Image 82, example of inactive data entry field with entered data

Data entry fields to link data in the EBMT Registry

Some of the patient event forms include a number of data fields that are not present in the corresponding Data collection form. The fields differ depending on the event form type:

- In Allo HCT, Auto HCT, CT, GT and IST treatment event forms, the users must add information on Indication diagnosis for this treatment.

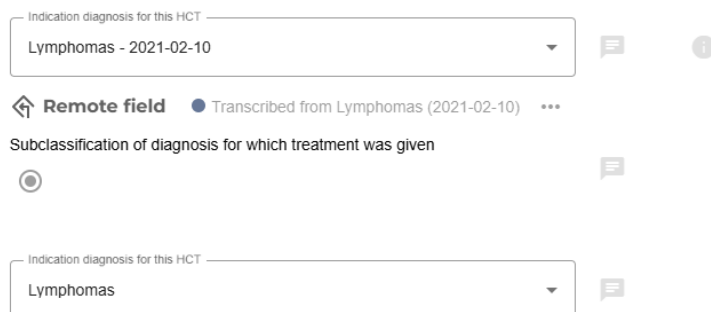


Image 83, example of data entry fields to link treatment and diagnosis events

- In Status at HCT/CT/GT/IST form the users must add information on Indication diagnosis for this treatment as well as treatment to which this event form refers to.




Image 84, example of data entry fields to link Status at HCT/CT/GT/IST form and treatment and diagnosis events

- In follow-up forms users must specify the indication diagnosis for this treatment and the exact treatment event the follow-up refers to

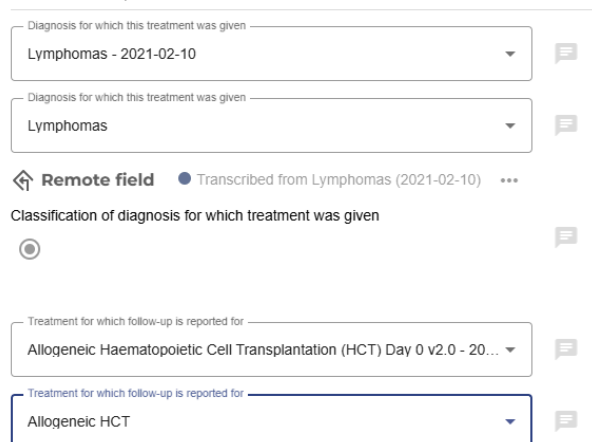


Image 85, example of data entry fields to link follow-up event and treatment and diagnosis events

There are two fields for users to enter the indication diagnosis for the reported treatment:

- 1) Drop down to select the main indication diagnosis for this treatment. The drop-down list includes all registered indication diagnosis events in the patient timeline with the date of each registered event. This data field is used to ensure the events are properly linked in the database and the data is correctly structured in OMOP.
- 2) Drop down to select the name of the main indication diagnosis for this treatment. This data field is used to ensure the visibility conditions for further data fields in this event form work correctly.

There are two fields for users to specify the treatment, the follow-up form refers to:

- 1) Drop down to select the treatment event in the patient timeline. The drop-down list includes all registered treatment events in the patient timeline with the date of each registered event. This data field is used to ensure the events are properly linked in the database and the data is correctly structured in OMOP.
- 2) Drop down to select the treatment type. This data field is used to ensure the visibility conditions for further data fields in this event form work correctly.


Mentioned above fields are mandatory and must be filled-in in order the data is properly organised in the EBMT Registry database and is included into the appropriate export file/table/dossier.

It is important to remember that if any event was archived (deleted) from the patient timeline, the data editor needs to open all the subsequent events, where archived (deleted) event could be mentioned in linking, and correct or update links.

If the date of transplant (treatment) was edited or changed, data editor should open the Status at HCT/CT/GT/IST form and update the data there as well.

Delayed migration status

Due to the fact that data migration from previously used systems will happen in stages, in the current version of the EBMT Registry users will see a notification in the affected data field(s) to mark that field value has not been migrated yet. Any field type may have such a status.

Data fields with delayed migration status are marked with the  icon. Once the migration is done, data field value (if any) will appear and the delayed migration status will be removed from the data field.

Delayed migration 



Image 86, a data field for which migration of data is still pending

Important: These fields are editable as any other field (except remote and calculated data fields). If data editor users enter the field value before the migration happens, it is recorded as the latest registered data field value. Data field value from the migration will be logged in the audit trail as historical data once the migration is complete.

Unknown migration

Since systems previously used by EBMT to collect data did not have strict visibility conditions and dependencies, in some cases the main data fields were left empty and only dependent fields contained information. In order to migrate such data correctly and not to lose submitted information respecting new EBMT Registry [visibility conditions](#), the empty at migration main (parent) fields that had dependant fields with entered data were marked as *Unknown migration*.

Transplant type follow up is reported for —

Unknown migration ⓘ

Image 87, the unknown migration field label

Unknown migration field value should not be edited by the users, and it is only present in the first version of the event form. Moreover, some of the answer options could be deactivated already. See image below as an example of Unknown migration status used to enable inclusion of dependent fields as legacy data.

Involvement at time of diagnosis —

Unknown migration ⓘ

^ Organ involvement ⓘ

Organs involved at time of diagnosis —

(Deactivated) Bone Marrow ▼


Indicate whether the organs were involved, uninvolved or not evaluated. —

☐ No ☒ Yes

Image 88, example of an Unknown migration field with data in the dependent fields

If a user marks the field with Unknown migration status as Normal, the migrated data in the dependent fields will be deleted. The user will be able then to enter the data into the main (parent) and dependent fields manually from available at the moment answer options (some answer options might be already [inactive](#) and will not be available).

Interdependent fields

Besides dependent fields within one event form explained above (see [visibility conditions](#)), there are also **interdependent fields** in the database across various event forms (e.g. calculated field and remote field), and if the field value is edited in one form, the EBMT Registry cannot apply the correction automatically in all the forms it is used at one time. Nevertheless, suppose a data editor corrects the field value in the source field, once the subsequent form (with dependent field) is opened, the system will apply these changes and mark the affected field with the icon .

Label



Automatically filled in ⓘ 

Image89, example of a remote field that is refreshed

Updates to the affected field(s) are applied automatically when a form containing this data field is opened, but a data editor has to click the Save changes button so that these changes are saved into the database. To reinforce that a user with editing rights needs to save changes, the Save changes button is shown as active until the changes are properly saved and the new version of the event form is recorded into the audit trail.

Extended dataset data fields

Extended dataset data fields are part of extended data set. Since in the EBMT Registry, users may choose to add the extended dataset-related data within regular patient events (see [Extended dataset](#)), such fields are marked with  icon.

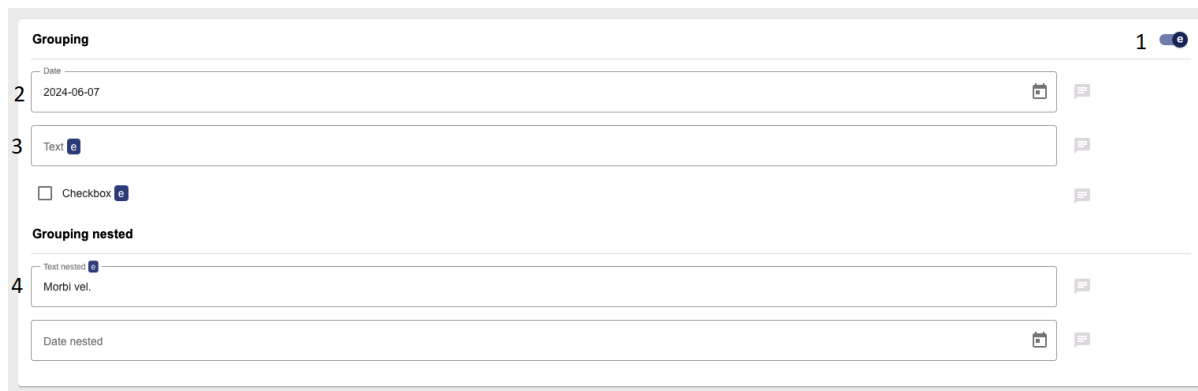


Image 90, extended and core dataset data fields: 1 toggle to show extended dataset data fields, 2 core dataset data field, 3 extended dataset data field without entered value, 4 extended dataset data field with entered value.

Extended dataset data fields are not shown by default upon creation of a patient event. Users should use the toggle switch button in the top right corner of an event section to show or hide extended dataset fields in a particular section of an event form.

Extended dataset toggle button may be as follows:




Icon	Description
	Extended dataset switch button is off. Extended dataset data fields are hidden (not visible), only core dataset data fields are shown in the particular section of an event form (see image).
	Extended dataset switch button is on. Both core dataset and extended dataset data fields are visible (see image). It is possible to switch the button off to hide extended dataset fields.
	Extended dataset switch button is on but disabled. Both core dataset and extended dataset data fields are visible. It is not possible to switch the button off to hide extended dataset fields because some of the extended data fields contain data (see image).

Table 19, Extended dataset toggle button icon

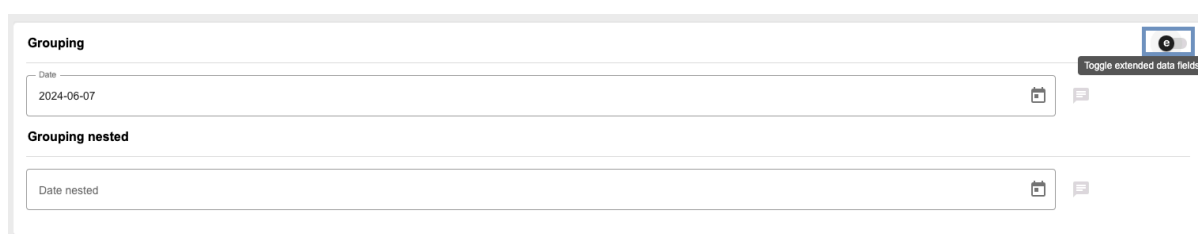


Image 91, extended dataset toggle button is off - no extended dataset fields are shown

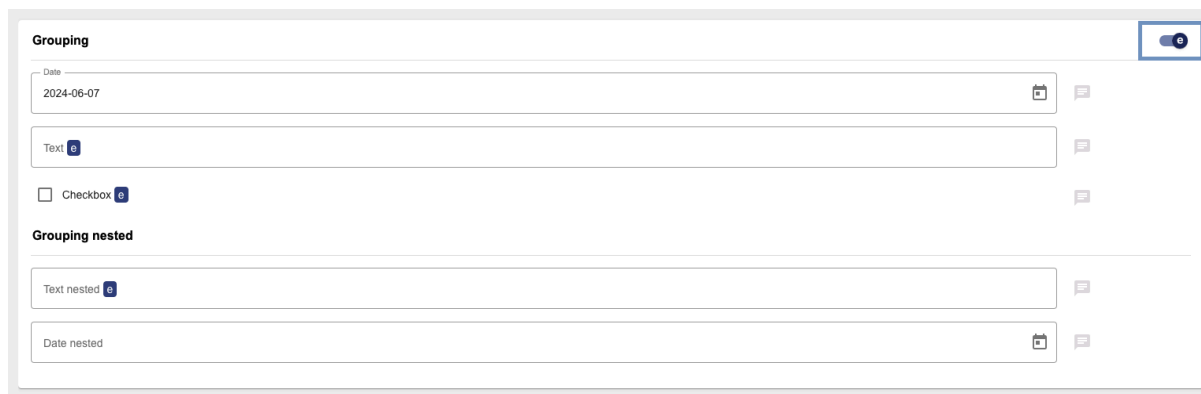


Image 92, extended dataset toggle button is on - extended dataset fields are shown

Note: once a data editor added information into extended dataset field(s), it is not possible to switch the extended dataset toggle button off and hide external data field. Users should remove data from extended dataset fields first to be able to hide them.

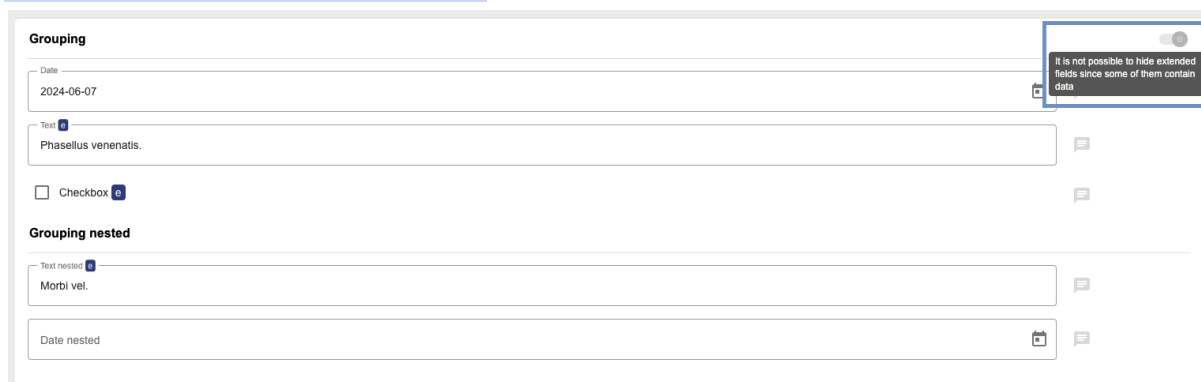


Image 93, extended dataset toggle button is on but disabled

System notifications and data check

In the current version of the EBMT Registry, the system notifications are implemented in various ways to inform the user and provide adequate support while using the system. Here are some of the most common ones:

Success notifications are displayed when an action is successfully completed (e.g. when a user saves changes in the event form, thereby creating a new version in the system). It is usually a short message on a dark grey background, which is shown for a few seconds at the bottom of the user web page and then automatically disappears, allowing the user to continue using the application.

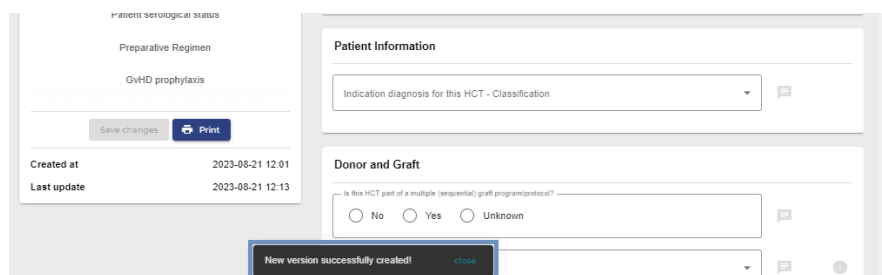


Image 94, an event with success screen visible at the bottom

System error notifications are displayed when an action fails, such as when a user tries to access the data of a patient who is not in the user's context. It is usually a modal window with a text explaining the issue.

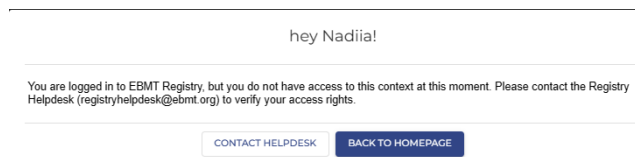


Image 95, access error due to no assigned context

Note: [Field errors](#) are different from system errors, they are described further in this section.

Warning notifications are displayed when there is a potential issue that needs to be addressed, such as when a data editor is entering a patient or donor that was opened by another data editor within the last 15 minutes. The system will warn the user about possible editing conflict. This type of notification is shown in the interface next to the element it refers to.

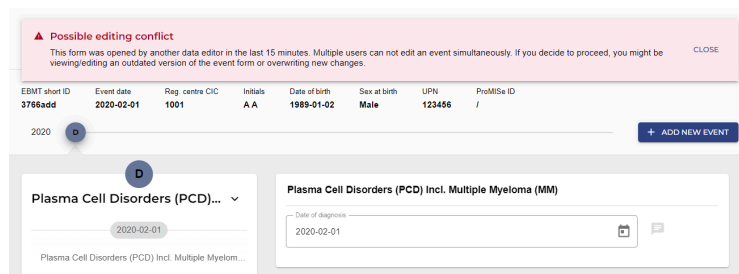


Image 96, possible editing conflict warning

Note: The [field warning](#) has a slightly different representation in the interface, and they are described in detail in the [Automated data check](#) section.

Confirmation notifications are usually displayed in a modal window. They typically contain a message explaining the action to be performed and asking the user to confirm or cancel the action. They often have two options, one for confirming the action and one for cancelling it. The user will see a window about unsaved changes when trying to leave an event form without saving changes (see image below). The user may choose to click *Confirm* button to proceed and leave the event form (the changes in the event form will not be saved) or click *Cancel* and return to the event form editing mode.

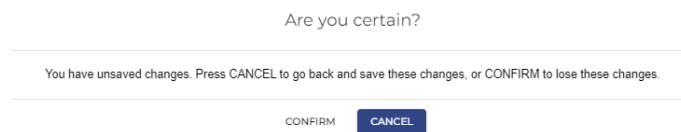


Image 97, confirmation on leaving the form without saving changes in the event

Some confirmation dialogues may also include additional options, such as stating a reason for the specific action being confirmed (e.g. stating a reason for making a change in an already submitted event form).



Image 98, confirmation on the reason for changes in the event

Scheduled maintenance notification

The notification about any upcoming maintenance of the EBMT Registry, when the system will not be available for user access, is shown in the top part of the user interface regardless of the section (see image below). EBMT will also inform users about scheduled maintenance through the website.

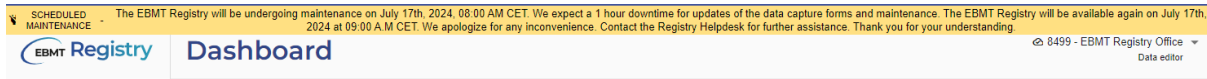


Image 99, example of a scheduled maintenance notification banner

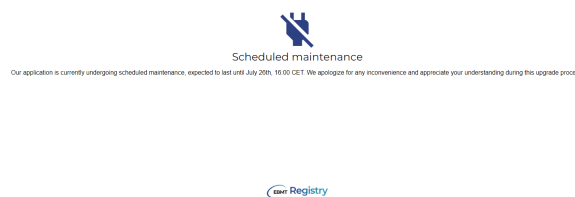


Image 100, example of a scheduled maintenance notification, when the system is not accessible due to maintenance

Page unresponsive

The EBMT Registry is a web application and if it takes too long to load the webpage, the system may show the notification as in the image below.

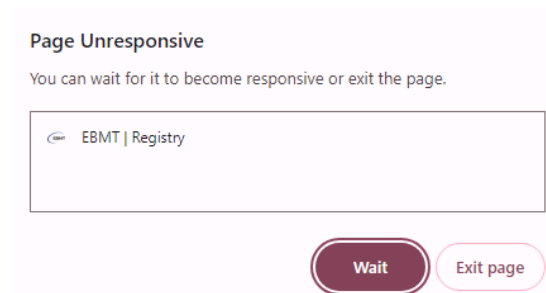


Image 101, notification on the EBMT Registry page unresponsive

Such messages may appear if the user internet connection is very slow. The users are advised to check their internet connection speed. The user may click the 'Wait' button to wait more time for the page to be loaded or exit the page to navigate away.

Automatic termination of user session due to inactivity

If the user is being inactive in the EBMT Registry web page or does not reload the web page for 20 minutes, the user will be shown the warning about the upcoming session termination (see image below). The user may click *Remain signed in* button to keep the user session active, otherwise the user will be signed out of the EBMT Registry.



Image 102, Warning on automatic termination of the user session due to inactivity (if the EBMT Registry web page is open in the user screen)

Note: entering data into data fields without clicking *Save changes* button is considerate as inactivity by the system since the web page is not updated or reloaded in the web browser during such edits. The users are advised to save data frequently to avoid it being lost if automatic sign out happens.

If the user has an active session in the EBMT Registry and is inactive there for 20 minutes, but the web browser tab with the EBMT Registry is not open or currently displayed at the user screen, the system will show the warning on possible loss of unsaved data due to automatic sign out (see image below). Should the user wish to keep the EBMT Registry session active, they are advised to click *Cancel* button and open the EBMT Registry in the browser tap. Otherwise, the user will be signed out automatically.

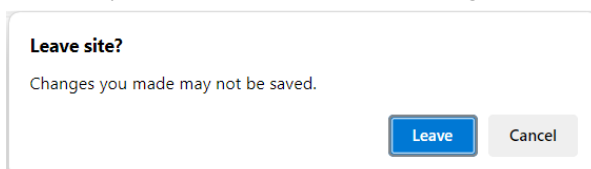


Image 103, Warning on automatic termination of the user session due to inactivity (if the EBMT Registry web page is not open in the user screen, but in one of the browser tabs)

Irreversible action notification or warning

While working with [groups of questions](#) or with data entry fields with [dependencies](#), the users may get the warning as shown in the image below if they edit data that was entered previously. The reason and details of the warning and consequences of the action are explained in the warning window. The user may choose to click *Cancel* button and cancel the action that leads to data deletion, or may click *Submit change* button to proceed.

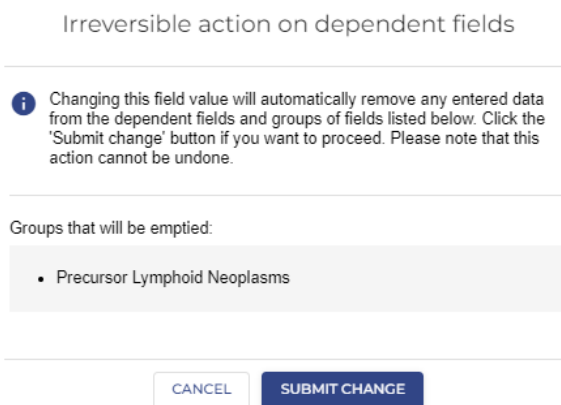
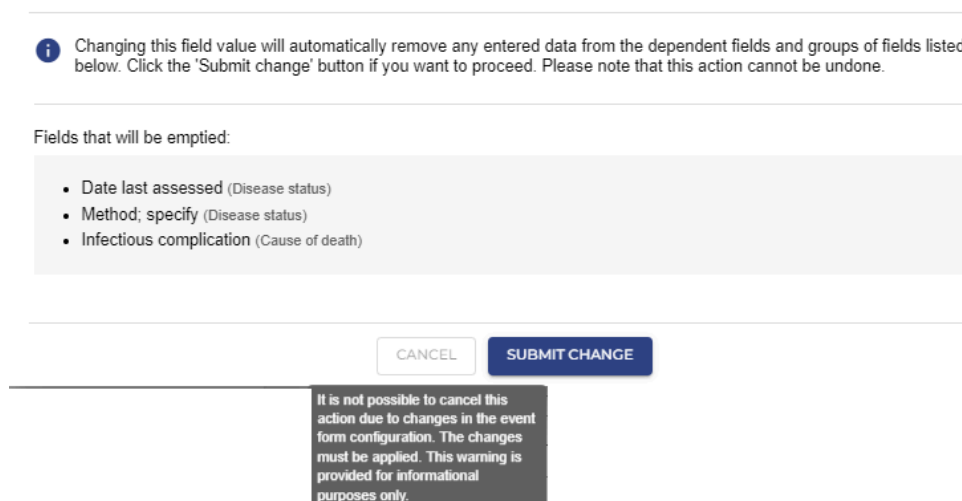


Image 104, example of a warning about deletion of data from dependent fields due to change in the main field answer (see visibility conditions)

While legacy data was prepared for migration to the EBMT Registry, it was noticed that in previous data collection systems used by EBMT it was possible for users to include contradictory data in the main and dependent fields (e.g. patient was reported as alive and there was also entered cause of death). Due to the fact that dependencies between data fields were changed/updated in the EBMT Registry compared to previous systems, some of the migrated data does not match the new dependencies and visibility criteria. For example, in ProMISe the user could report absence of GvHD and also record the aGvHD grade 0 (none). If the answer to the first question (GvHD present: yes or no) is answered 'no' in the EBMT Registry (no observed GvHD), the user is not able to register detailed information about aGvHD and cGvHD due to the introduced visibility conditions (these fields are not shown and thus cannot be filled in).

In case of such inconsistencies after data migration or due to new visibility rules, the information in the main data fields will stay as migrated and information in the dependent fields will be removed. The users will be shown the notification as in the image below. Users cannot cancel such action (*Cancel* button is disabled and there is an explanation shown upon mouse hover) and must click *Submit changes* button. If they fail to do it, the notification will be shown every time the event form is loaded to the user screen until the changes are saved and a new version of the event form without contradictory data is created.

Irreversible action on dependent fields



i Changing this field value will automatically remove any entered data from the dependent fields and groups of fields listed below. Click the 'Submit change' button if you want to proceed. Please note that this action cannot be undone.

Fields that will be emptied:

- Date last assessed (Disease status)
- Method, specify (Disease status)
- Infectious complication (Cause of death)

CANCEL SUBMIT CHANGE

It is not possible to cancel this action due to changes in the event form configuration. The changes must be applied. This warning is provided for informational purposes only.

Image 105, example of a notification about deletion of data from dependent fields due to inconsistency with the main field answer

Note: if in the previous system the main data entry field was left empty, but dependent data entry field had data entered, the information from dependent fields will not be lost (see [Unknown migration](#)).

Automated data check

The automated data check, warning and error messages are important features of the EBMT Registry and are designed to improve data quality and to prevent mistakes.

With **automated data check**, the system automatically verifies the data entered by users, comparing it to established standards (validation rules and reference values) or previously entered data, flagging any inconsistencies or errors. This helps prevent common mistakes such as typos, missing information, incorrect formatting, etc.

The automated data check is set up by the EBMT Registry team and is not visible to the end user. In case of possible issues or concerns, users should contact the EBMT Registry helpdesk by emailing registryhelpdesk@ebmt.org.

Field warning and error messages are another important feature, providing real-time alerts to users about any issues or concerns that arise during data entry. Most of them do not affect or block data entry processes. However, the message will remain visible, allowing monitors and other users (both data viewers and data editors) to see that the field/event form/patient data contains an unexpected value.

Practical example: for values that are expected to fall within set ranges or specific answers, a warning/error message may be displayed next to a data entry field if the entered value does not match the range/expected value: e.g. if a value is entered in percentages higher than 100, or for negative weight or height values.

Note: The process of EBMT Registry improvements is expected to be a continuous one. This means that new validation checks, warnings and errors will be added to consistently improve the data quality and to support users in the process of data entry.

Field warnings

Warnings are used to inform EBMT Registry users that there is an issue with the entered field value, or a missing field value. It is shown in the following way:

1. the field is highlighted in yellow;
2. there is a message text under the field to explain the warning;
3. an exclamation mark in a triangular box is shown in the right top corner of the question group;
4. an exclamation mark in a triangular box next to the title of the event form section in the [event form summary](#).

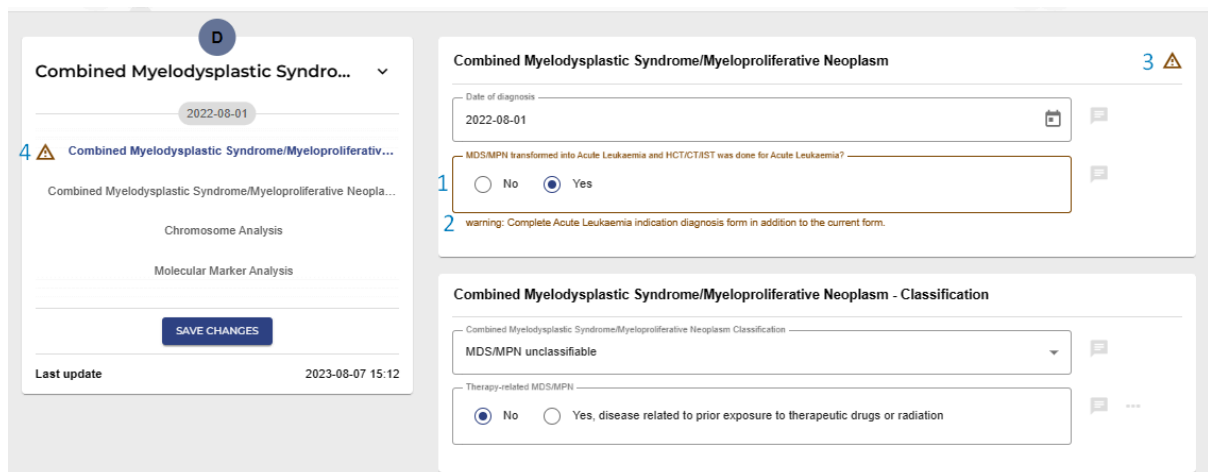


Image 106, example of a field warning

Field errors

Error messages are used to inform EBMT Registry users that there is an error in the entered field value, or a missing field value. It is shown in the following way:

1. the field is highlighted in red;

2. there is a message text under the field to explain the error;
3. an exclamation marks in the circle is shown in the top right corner of the question group;
4. an exclamation mark in the circle is next to the title of the event form section in the [event form summary](#).

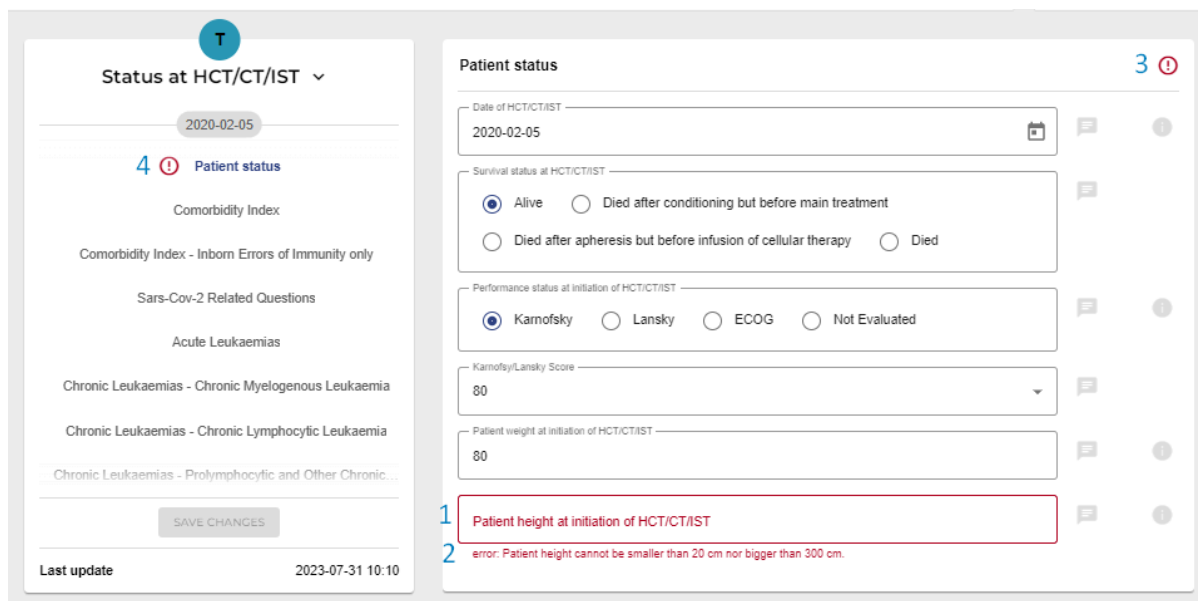


Image 107, example of a field error

Note: that there are some data fields in the EBMT Registry that must be answered and cannot be left blank. For example, the event date. The system will not allow the form to be created/saved without entering value into such a crucial field.

Duplicate check

The EBMT Registry performs the duplicate check when a user creates a new patient in the system. This ensures:

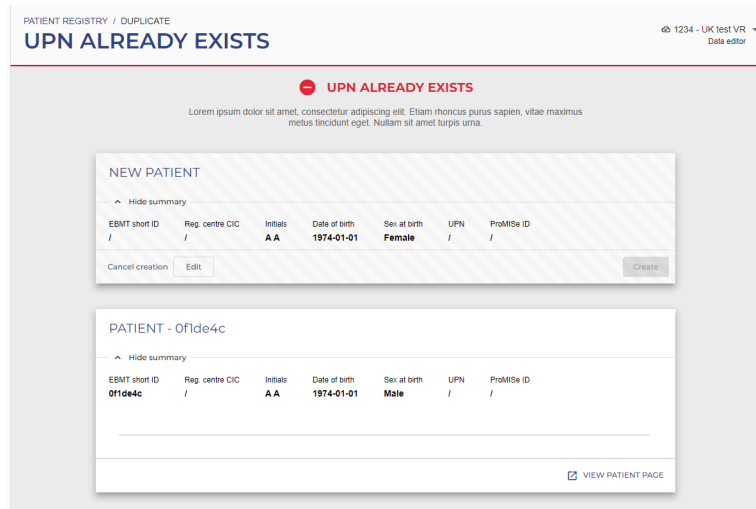
- Avoiding duplicate entries: by identifying existing patient records, it helps to prevent the creation of duplicate entries in the database. It ensures that each patient has a unique and single record, improving data management.
- Data accuracy: by highlighting potential duplicates, the application assists users and EBMT staff in reviewing and verifying patient information.

When a user enters new patient information during the patient registration process, the application performs the following steps:

1. Data validation: The application validates the entered information for completeness and correctness, ensuring that all mandatory fields are filled accurately.
2. Matching Criteria UPN (the same UPN at the same centre)
3. The application compares the entered data against existing records in the system using the predefined matching criteria (duplicate check algorithm).

Case 1: if the new patient UPN is identical to an UPN of an existing patient at this centre, these records are considered as definite duplicates - creation of a new patient is not allowed. The user will receive a corresponding error message and a summary of patient details (see screenshot below). The user can

either cancel the new patient creation and continue working in the existing patient page, or the user can modify the data of the patient under creation and try registering it again.



The screenshot shows the 'NEW PATIENT' form in the EBMT Registry. At the top, a red banner reads 'UPN ALREADY EXISTS'. Below this, a table displays the patient data entered: EBMT short ID (01de4c), Reg. centre CIC (/), Initials (AA), Date of birth (1974-01-01), Sex at birth (Female), UPN (/), and ProMise ID (/). The 'UPN' field is highlighted in red, indicating the source of the error. A 'Create' button is visible at the bottom right of the form.

Image 108, the error message if a duplicate UPN is entered

4. Potential duplicates: If the application finds records that closely match the entered data, it displays a warning message. The duplicate check matching criteria include:
 - Birthdate;
 - Sex at birth;
 - Blood group;
 - Rhesus factor;

Note: the duplicate check is currently limited to the patient country only: this means that the new patient data will be only compared to data of patients registered in the same country.

The duplicate check algorithm is set up in such a way that the system compares the data value of the new patient (Pn) and existing in the database patient (Pe) in the following order:

1. **Date of birth** match - this is done by progressively deepening into the comparison:

- First, the year of birth is compared;
 - If they match, the system proceeds to compare the next parameter;
 - If they don't match, Pe and Pn are not considerate being duplicates (comparison stops).
- Second, the month of birth is compared:
 - If it is specified for both patients, proceed to compare the next parameter;
 - If it is specified for both patients and don't match, Pe and Pn are not considerate being duplicates (comparison stops).
 - If in one or both patients the month of birth is not specified, the system will consider them matching and proceed to compare the next parameter.
- Third, the day of birth is compared:
 - If it is specified for both patients and match, the rule is satisfied. The system proceeds to compare the next parameter.
 - If it is specified for both patients and don't match, Pe and Pn are not considerate being duplicates (comparison stops).

- If in one or both patients the day of birth is not specified, the system will consider them matching and proceed to compare the next parameter.

2. Sex at birth match

- If in one or both patients records the sex is not specified (patients registered through the previous system sometimes do not have this data), the system will consider them matching and proceed to compare the next parameter.
- If it is specified for both patients and don't match, Pe and Pn are not considerate being duplicates (comparison stops).

3. Blood group match

- If the blood group is not specified for one patient, the system will consider them matching and proceed to compare the next parameter.
- If it is specified for both patients and don't match, Pe and Pn are not considerate being duplicates (comparison stops).

4. Rhesus factors match:

- If in one or both patients records the rhesus factor is not specified (patients registered through the previous system sometimes do not have this data), the system will consider them matching and proceed to compare the next parameter.
- If it is specified for both patients and don't match, Pe and Pn are not considerate being duplicates (comparison stops).

5. Initials match

- If it is specified for both patients and match, the match should be exact, disregarding the lower/upper case: e.g. A/G match a/g, while NN/S do not match N/S.
- If it is specified for both patients and don't match, patients are not considerate being duplicates.
- If in one or both patients the initials are not specified, the system will consider them matching and proceed to compare the next parameter.

The following cases may arise in case EBMT Registry identifies possible duplicate(s):

Case 2: The user is trying to create a patient that is a possible duplicate of an existing patient. The user has access to an existing patient data and thus can review data and check whether patients are actually duplicates or not. The EBMT Registry shows the list of potential duplicates for the user's review (see screenshot below).

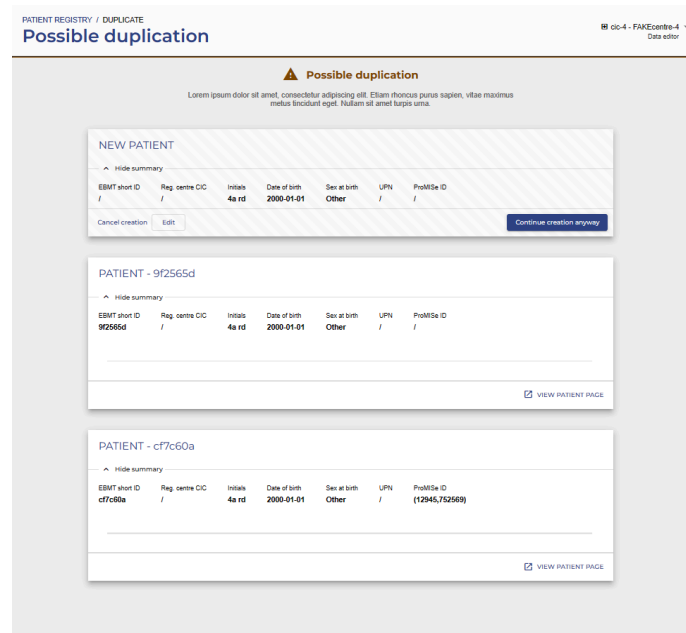


Image 109, the warning for a possible duplicate patient where the user has access to the possible duplicate

Possible actions for the user:

The user carefully examines the potential duplicate records to determine whether they correspond to the same patient or if they are indeed separate individuals.

Final action: Based on the user's evaluation, the application allows the user to either:

- proceed with the registration of a new patient (by clicking *Continue creation anyway*): the new patient will be registered but marked as tentative pending administrator review;
- cancel the new patient creation (by clicking *Cancel creation*) and select an existing patient record to register or edit data.

Case 3: The user is trying to create a patient that is a possible duplicate of an existing patient. The user does not have access to the data of an existing patient (this patient is not in the user [Context](#)) and thus cannot review data and check if the patients are actually duplicates or not. The EBMT Registry shows the respective warning (see screenshot below). The data of patients outside of the user context are not visible.

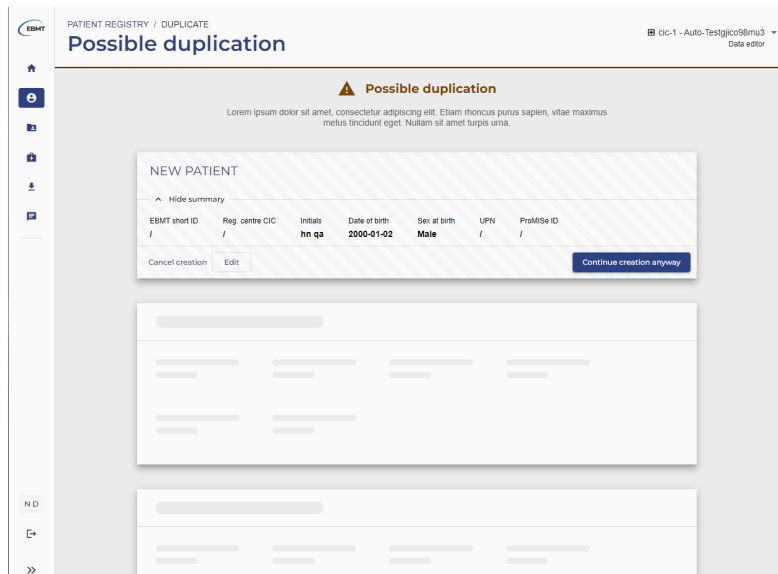


Image 110, the warning for a possible duplicate patient where the user does not have access to the possible duplicate

Possible actions for the user:

Based on the user's evaluation, the application allows the user to either:

- proceed with the registration of a new patient (by clicking *Continue creation anyway*): the new patient will be registered but marked as tentative pending Administrator review;
- cancel new patient creation (by clicking *Cancel creation*).

If the EBMT Registry does not suspect a new patient under creation as a possible duplicate, the patient is registered in the system and appears immediately in the patient overview list.

Source data verification (SDV)

Source data verification (SDV) is a process performed by a [data monitor](#) to ensure that the data entered into the EBMT Registry corresponds to the original source documents of the patient and thus it is reliable and accurate.

Note: data viewers and data editors do not have access to see the SDV status of any data field. These are the EBMT Registry monitors internal processes and is part of a data quality check.

SDV refers to the data field value (answer), only the data monitor can see and update the SDV. The SDV is done only by data monitors and only if a patient consented to provide access to their original source documentation (see Patient consent).

Access to the EBMT Registry: all users HOW TO

Here is a step-by-step for a user to get access to the EBMT Registry:

1. **Submit the *EBMT Registry User Account Request form* to the EBMT Registry Helpdesk by emailing registryhelpdesk@ebmt.org.**

It is important to note that the user role will be already indicated at this stage. The form must be properly filled in and signed by the PI of the centre or VR.

If a user requires access to multiple contexts, the form needs to be filled in per each context.

2. **Complete the EBMT Registry training in the EBMT E-learning platform.**

EBMT will activate access to the EBMT Registry only for the individuals who have successfully completed the specifically designed training and passed the exam in the EBMT E-learning. This is in order to ensure that the users are able to work with the new web- application and the database.

Access to the E-learning training will be provided to all users, who submit the *EBMT Registry User Account Request form*.

In case a user requires access to multiple contexts with different roles, the following should be taken into account:

Completed Data viewer training - is valid only for users to be granted a Data viewer role.

Completed Data editor training - is valid for both Data viewer and Data editor roles.

Only certificates on successful completion of the respective course in the EBMT E-learning will be recognised and considered while setting a user account in the EBMT Registry.

Additional online or face-to-face training course(s), questions and answers sessions, and other events provided by EBMT, National Registries or other stakeholders may be organised to support the users but cannot substitute the E-learning training.

It should be expected that new functionalities will be developed and added to the EBMT Registry application in the future, which will be announced to the EBMT members and stakeholders accordingly. In case of major changes, the users might be asked to undergo additional specific training and pass exams.

Note: the EBMT will require some time to process the confirmation on successful completion of the EBMT E-learning course and for the administrator to create/activate the user in the system and link to a correct context. Until this is completed, when a user Signs up or Signs in to the EBMT Registry, they may experience the following problems:

- Warning message that there is no active user with such email; or
- Required centre/VR is not shown in the Context menu (as requested in the *EBMT Registry User Account Request form*).

3. **Sign up and Sign in to the EBMT Registry application.**

The sign in (log in) to the EBMT Registry web-based application is currently done through the AWS *Cognito* service, which is an external service to manage the identity and authentication of users for the EBMT Registry and for its demo environment.

Note: Sign up process must be followed only once by every user. It ensures that the user created username and password that is used both to enter the real system and its training environment.

All [Users](#) need to set up and pass 2-factor authentication, which means that every time they want to sign in to the EBMT Registry, they not only enter their login and password but also need to confirm the entry through an additional [MFA](#) authenticator program. The MFA is used both to enter the EBMT Registry and its training environment.

Details on [Sign up](#), [Setting up the MFA](#), [Sign in](#) and other related processes will be further explained in the current section of the Manual.

First time sign up - how to create login and password

Please follow the following step-by-step to create a username and password to access the EBMT Registry for the first time:

Step	User actions	EBMT Registry
1	Open the app in your browser.	<p>The regular Log in page opens.</p> <p>Sign in with your username and password</p> <p>Username</p> <input type="text"/> <p>Password</p> <input type="password"/> <p>Forgot your password?</p> <p>Sign in</p> <p>Need an account? Sign up</p>
2	Click the Sign up text button at the bottom of the form.	<p>The Sign up with a new account form opens.</p> <p>Sign up with a new account</p> <p>Username</p> <input type="text"/> <p>Email</p> <input type="text"/> <p>Password</p> <input type="password"/> <p> ✓ Password must contain a lower case letter ✓ Password must contain an upper case letter ✓ Password must contain a number ✓ Password must contain at least 8 characters ✓ Password must contain a special character or a space ✓ Password must not contain a leading or trailing space </p> <p>Sign up</p> <p>Already have an account? Sign in</p>
3	<p>Fill-in the Sign up with a new account form:</p> <ul style="list-style-type: none"> • Create Username; • Input Email (it must be the same email as in the <i>EBMT Registry User Account Request form</i>); • Create Password, check that password requirements are met 	<p>The Confirm your account form opens.</p>

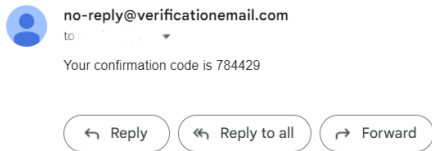
	<p>and thus all highlighted in green; and</p> <ul style="list-style-type: none"> Click the Sign up button. 	
	<div> <h3>Confirm your account</h3> <p>We have sent a code by email to t***@e***. Enter it below to confirm your account.</p> <p>Verification code <input type="text"/></p> <p>Confirm account</p> <p>Didn't receive a code? Send a new code</p> </div>	
4	<p>Check the mailbox specified in Step 2. There will be a new email from no-reply@verificationemail.com with the confirmation code that contains six digits. If you cannot find such an email in your Inbox, please check the Spam folder.</p> <div>  <p>no-reply@verificationemail.com to: ... Your confirmation code is 784429</p> <p> Reply Reply to all Forward </p> </div> <p>If the mail still has not arrived after a few minutes, please go to the <i>Confirm your account</i> window and press Send a new code text button, which is located at the bottom of this modal window. The system will send a new code to the entered email address.</p>	
5	<p>Enter the confirmation code from the email to Confirm your account form and click the Confirm account button.</p> <p>Important: Sign up confirmation code is valid for 24 hours. After that, it expires. Please make sure to enter received code into the required field of Confirm your account form and complete the Sign up process at your earliest and before this deadline.</p>	<p>If the code is entered correctly, the system will proceed to Set up MFA process.</p> <p>If the code is entered incorrectly, the system will show an error: <i>Invalid verification code provided, please try again.</i></p> <p>Try entering the code again or request a new code to be sent with Send a new code text button.</p>

Table 20, steps on setting up your credentials (username and password)

Set up MFA

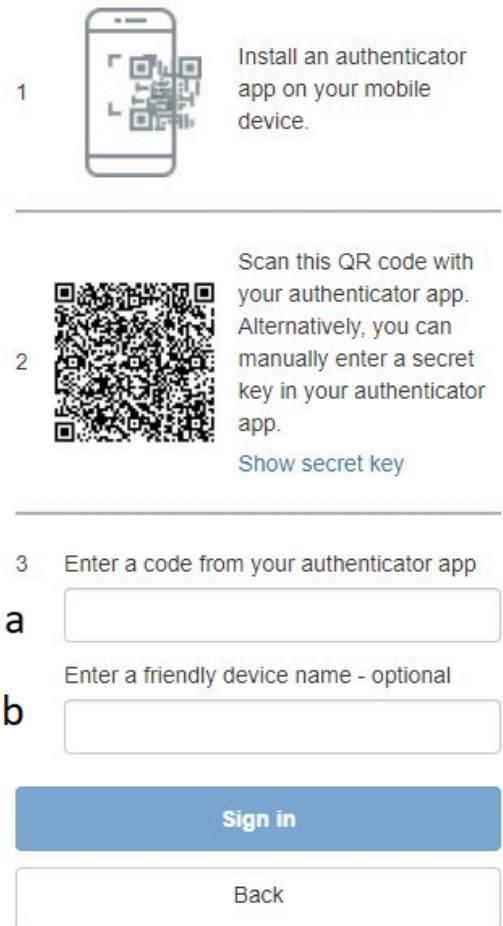
Instructions on setting up the [authenticator application MFA](#) are displayed on the screen (Image 1). It includes the following steps:

1. Install an authenticator application on your mobile device.
OR
Install an authenticator application on your computer.

Important: remember that this device must always be available when a user tries to sign in to the EBMT Registry. It is not possible to use different devices.

2. Scan the QR code displayed on the screen (Image 111) with your authenticator app - this will automatically add your account to the authenticator app.
OR
Alternatively, you can click the **Show secret key** text button and manually enter the shown secret key (combination of letters and numbers) into your authenticator app. Depending on the app, you might also be asked to enter the name of the account and the type of code.

Set up authenticator app MFA



1 Install an authenticator app on your mobile device.

2 Scan this QR code with your authenticator app. Alternatively, you can manually enter a secret key in your authenticator app.
[Show secret key](#)

3 Enter a code from your authenticator app

a

Enter a friendly device name - optional

b

Sign in

Back

Image 111, setting up authenticator app MFA

3. a) Verify your account: once you have added your account to the authenticator app, you will need to verify it. This involves entering a code that is generated by the app into the field **a** on Image 72. This code changes every few seconds, so make sure you enter the correct code at the right time.
b) Enter an MFA device name into the field **b** on Image 76 to remember which device you use for entering the EBMT Registry. This field is optional. If you leave it blank, you will be shown in the future instructions with default text *Please enter the code from passcode app*.
4. Click the **Sign in** button at the bottom of *Set up of authenticator application MFA* form. If the authenticator app was verified correctly and you entered a correct code, you will be signed in to the EBMT Registry and see the Dashboard.

Note: If the authenticator app was not verified correctly or you entered an incorrect code, you will see an error message *Invalid or expired code entered. Try again*. You can try entering the code from your authenticator app once again, as explained in Step 3. If the sign-in failed again, try to remove the account from your authenticator app and set it up again, as explained in Step 2.

Regular Sign in

This section explains the process of entering the EBMT Registry for the users that have already done the first time [Sign up](#) (created their username and password) and [Set up MFA](#). This means that such users have entered the EBMT Registry in the past:

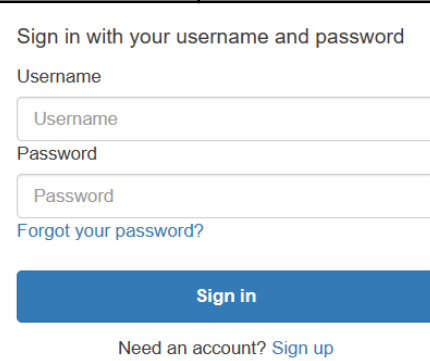
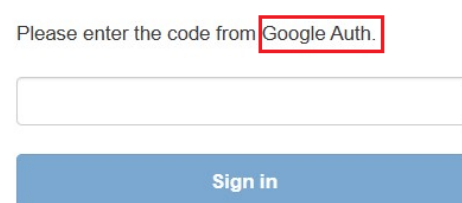
Step	User actions	EBMT Registry
1	Open the app in your browser.	The regular Sign in page opens.
		
2	<p>Fill-in the <i>Sign in</i> form:</p> <p>Username - you can enter here the email address or your username registered at the first time Sign up.</p> <p>Password - enter the latest password you registered.</p> <p>Click the Sign in button.</p>	<p>If you entered the correct username and password, the <i>MFA Code</i> form to enter the code from your authenticator device opens.</p> <p>Name of the device is displayed as registered in Step 3b of Set up MFA.</p> <p>If you entered incorrect username and/or password, the error message <i>Incorrect username or password</i> will be shown.</p>
		
3	Enter the code from your authenticator app into <i>MFA Code</i> form and click the Sign in button.	<p>If you entered a correct code, you will be signed in to the EBMT Registry and see the Dashboard.</p> <p>If you entered an incorrect code, you will see an error message <i>Invalid or expired code entered. Try again</i>. You can try entering the code from your authenticator app again.</p>

Table 21, signing in after setting up your account

Important: after five consecutive failed login attempts, regardless of the reason (wrong username, wrong password, etc), there is an enforced lockout time for that user. A lockout time is a period in which the user cannot make any more attempts for authentication. Users should not try to sign in for a minimum of 15 minutes, after that, the user can do a normal sign -in attempt again or reset their password through the

Forgot your password functionality. If the issue still persists, users should contact the Registry Helpdesk registryhelpdesk@ebmt.org.

Possible error messages:	Error related to topic	How to resolve
No active user with this email found in the system	Inactive user	<ol style="list-style-type: none"> 1. Make sure you have submitted an <i>EBMT Registry User Account Request form</i> with the same email address. 2. Make sure you have successfully completed the EBMT E-learning training. 3. Contact the EBMT Registry Helpdesk providing details of the user experiencing the problem (user registered email address must be indicated).
No context assigned to a user	Context or Inactive Centre/VR	Contact the EBMT Registry Helpdesk providing details of the user experiencing the problem (user registered email address must be indicated) and CIC number of the centre/VR.

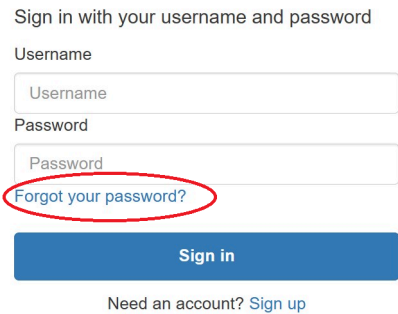
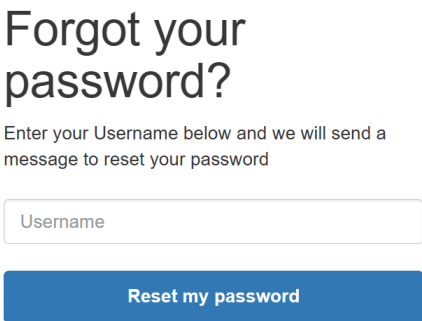
Table 22, common error messages and steps to resolve them

Password change

Users can change their password in two ways:

1. from the EBMT Registry login page;
2. from the [User profile](#) when the user is in the EBMT Registry (signed in).

1. Here is step by step to change the password from the EBMT Registry login page:

Step	User actions	EBMT Registry
1	Open the app in your browser.	The regular <i>Sign in</i> page opens.
		
2	Click <i>Forgot your password?</i> text button at the <i>Sign in</i> page.	The <i>Forgot your password</i> page opens.
		
3	Enter your Email or Username into the field at <i>Forgot your password</i> page and press <i>Reset my password</i> button.	<p>The system will send the code for the password change to the registered email.</p> <p>The <i>Change password</i> page opens.</p>

	<p>We have sent a password reset code by email to n***@e***. Enter it below to reset your password.</p> <p>Code</p> <input type="text" value="a"/> <p>New Password</p> <input type="text" value="b"/> <p>Enter New Password Again</p> <input type="text" value="c"/> <p>Change Password</p>	
	<p>Check the mailbox specified on Step 2. There will be a new email from no-reply@verificationemail.com with the confirmation code that contains six digits. If you cannot find such an email in your Inbox, please check the Spam folder.</p> <p>no-reply@verificationemail.com to</p> <p>Your password reset code is <u>043409</u></p> <p> <input type="button" value="Reply"/> <input type="button" value="Reply to all"/> <input type="button" value="Forward"/> </p>	
4	<p>Fill in fields a, b and c in <i>Change password</i> page:</p> <ul style="list-style-type: none"> - enter the confirmation code from the email to the field a; - enter a new password to the field b; - enter a new password again to the field c; <p>check that password requirements are met and thus all highlighted in green.</p> <p>Click the Change password button.</p> <p>Important: password reset code is valid for 1 hour only. After that it expires. Please make sure to finalise Password change/reset before this deadline.</p>	<p>The regular Sign in page opens.</p> <p>The new password is now saved and should be used.</p> <p>Follow the regular Sign in process to enter the EBMT Registry.</p>

Table 23, steps after a user forgets their password for the EBMT Registry

2. When the user is signed in to the EBMT Registry they can change their password in the following way:

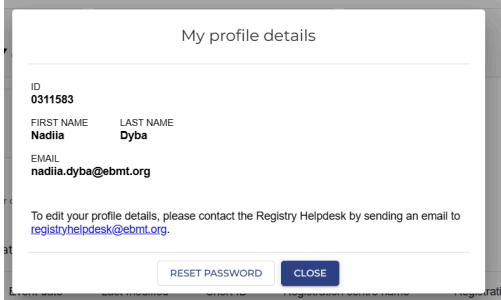
Step	User actions	EBMT Registry
1	Open User profile at the Navigation menu and click the Reset password button.	The <i>Forgot your password</i> page opens.
		
	<p>Follow the Steps 2-4 as described above to change the password from the EBMT Registry login page.</p> <p>Important: password reset code is valid for 1 hour only, after that it expires. Please make sure to finalise Password change/reset before this deadline.</p>	

Table 24, changing the password for the EBMT Registry

Reset MFA

Reset MFA is required in some cases, including but not limited to:

- user needs to change the MFA device or authentication application;
- previously used MFA device is not secure or lost.

Reset of MFA settings will also require the user to change both the password to the EBMT Registry and Set up MFA once again. The process for MFA reset is described in the following step by step:

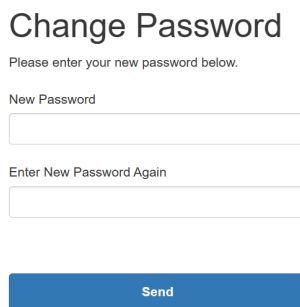
Step	User actions	EBMT Registry
1	Contact the EBMT Registry Helpdesk (registryhelpdesk@ebmt.org) to notify that the MFA device is lost or needs to be changed. Provide details.	Administrator resets users settings for MFA. Important: MFA settings reset involves multiple parties and may take up to 7 working days.
	<p>Check the mailbox. There will be a new email from no-reply@verificationemail.com with the information as provided in the example below. If you cannot find such an email in your Inbox, please check the Spam folder.</p> <p><i>Dear,</i> <i>Your account to the EBMT Registry has been reset by an administrator. You can log in using your original username and the temporary password below to (re-)configure MFA.</i> <i>Username: [username]</i> <i>Temporary password: [temporary password] (e.g. 2%vqDea0)</i> <i>Kind regards</i></p> <p>Important: temporary password from MFA reset email is valid for 24 hours. After that, it expires. Please make sure to complete Steps 2-4 as soon as possible and before this deadline.</p>	
2	Open the app in your browser.	The regular <i>Sign in</i> page opens.
3	Enter the Username and temporary password received by email (in Step 1).	The <i>Change Password</i> page opens.
	 <p>The screenshot shows a 'Change Password' form with the following elements: a title 'Change Password', a subtitle 'Please enter your new password below.', two input fields labeled 'New Password' and 'Enter New Password Again', and a blue 'Send' button at the bottom.</p>	
4	Enter a new password to the fields in the <i>Change Password</i> page. Check that password requirements are met and thus all highlighted in green. Click the Send button.	The <i>Set up an authenticator app MFA</i> window opens. Follow the Set up MFA process.

Table 25, resetting your multi-factor authentication

Sign out

Signing out of a web application is essential to ensure the security and privacy of sensitive data. By signing out, the user terminates the session of the web application. This means that once logged out, the user has to go through the [Sign in](#) process, including MFA, to enter the system again.

Signing out from the EBMT Registry is essential for several reasons, including:

- **Security:** Signing out from the application ensures that sensitive medical data is protected from unauthorised access by others who may have access to the user's computer or device.
- **Privacy:** Signing out of the application helps to protect user privacy.
- **Compliance:** Signing out of the application is necessary to comply with various regulations and standards governing the handling and storage of medical data, such as HIPAA and GDPR.

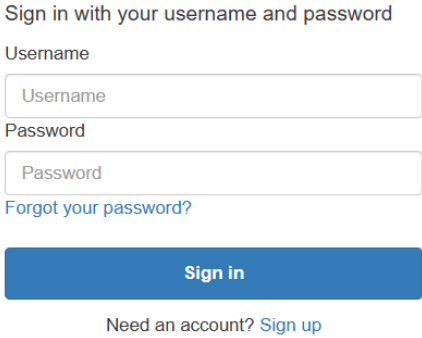
Step	User actions	EBMT Registry
1	From anywhere in the EBMT Registry, click the <i>Sign out</i> button or icon in the Navigation menu .	The regular <i>Sign in</i> page opens.
		

Table 26, logging out

Note: simply closing the user's browser window or tab is not considered secure enough and does not substitute the sign out (logout) process. If a user does not sign out properly, the user's session may remain active in one of the open browser tabs, potentially allowing unauthorised access to the data.

If EBMT Registry was open in multiple tabs of the browser and the user terminates the session in one of the tabs (signs out), the information already loaded in the still open tab with EBMT Registry web app will remain visible, but upon reloading the EBMT Registry tab(s) (or any activity on the web page) the user will see the Sign in page.

If, for any reason, a user is using two or more browsers (not tabs) to work in the EBMT Registry simultaneously, The Sign-out process (session termination) should be done separately for each browser. It is not recommended, though, to work in multiple browsers to avoid confusion or editing conflicts.

Change Context

The process below explains how to change the [Context](#) for users that have access to multiple contexts.

Step	User actions	EBMT Registry
1	From anywhere in the EBMT Registry, click the Context menu .	Dropdown list with the list of all available for the user active contexts will be open under the Context menu.
2	Click the context you want to be opened.	The Dashboard for the user in the selected context is loaded. The Context menu displays the name of the context and user role.

Table 27, changing contexts

Viewing data

Once the user with access to one or multiple contexts enters the EBMT Registry, they can navigate around and view the data available within their [context](#).

Use the Navigation menu to open the Patient registry or Donor outcome registry.

Click the Patient in the [Patient Registry](#) or Donor in the [Donor outcome registry](#) to open and view the [Patient/Donor page](#), see summary data, timeline and events.

From the Patient page, users can also open the [Patient menu](#) to see the following information about this patient:

- Patient registration data and related details.
- Consent data - responses to EBMT Informed Consent questions.
- Studies - summary on any EBMT and non-EBMT studies the patient was/is enrolled in.
- Centres - Information on the patient registration centre as well as centres that have access to the patient record and the UPN for each of these centres.
- Notes - text field for the users notes. This information is for users information only. It is not included into analytical database.

From the Donor page, users can open the [Donor menu](#) to see the following information about this donor:

- Donor registration data and related details.
- Consent data - responses to EBMT Informed Consent questions.
- Centres - Information on the donor registration centre as well as centres that have access to the donor record and the Donor ID for each of these centres.
- Notes - text field for the users notes. This information is for users information only. It is not included into analytical database.

This section provides simplified step-by-step instructions to find and view various types of data within EBMT Registry user context for users of all roles.

View Patient/Donor Event

Please follow the below step-by-step to access and view Patient/Donor events.

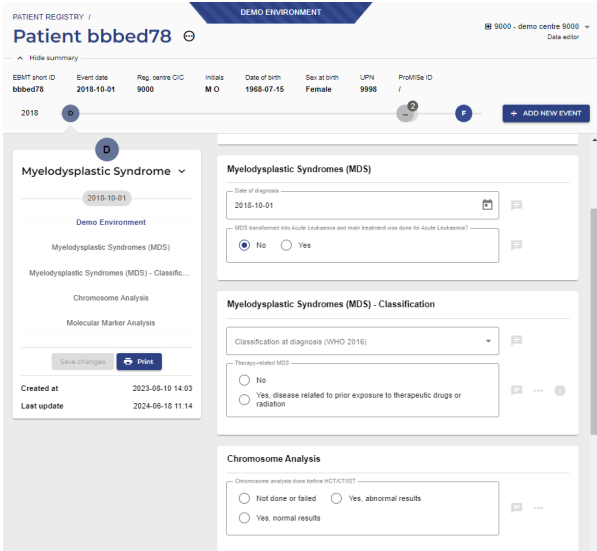
Step	User actions	EBMT Registry
1	Click on the Event in the <i>Patient/Donor timeline</i> (Patient or Donor page).	<i>Patient/Donor event form</i> and <i>Patient/Donor event form summary</i> is loaded and shown on the Main screen.
		
	Patient/Donor event form includes: <ul style="list-style-type: none"> • Patient/Donor event form data. • Print button - to print the event form currently open in the Main screen; • Save changes button - to save any introduced changes to the event. This button is disabled for data viewers/monitors. 	

Table 28, viewing a patient/donor events

View Patient/Donor Details

Please follow the step-by-step below in order to access and view patient or donor general registration data fields and their EBMT patient ID or EBMT donor ID.

Step	User actions	EBMT Registry
1	Click <i>Edit patient details</i> in the <i>Patient menu</i> . Or Click <i>Edit donor details</i> in the <i>Donor menu</i> .	The <i>Edit patient</i> window opens. Or The <i>Edit donor</i> window opens. For Data editors all editable fields are highlighted. For Data viewers the fields are visible but greyed out to emphasise that they are not editable and disabled.
<div> <div> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p> <p>12</p> <p>13</p> <p>14</p> <p>15</p> <p>16</p> <p>17</p> <p>18</p> <p>19</p> <p>20</p> <p>21</p> <p>22</p> <p>23</p> <p>24</p> <p>25</p> <p>26</p> <p>27</p> <p>28</p> <p>29</p> <p>30</p> <p>31</p> <p>32</p> <p>33</p> <p>34</p> <p>35</p> <p>36</p> <p>37</p> <p>38</p> <p>39</p> <p>40</p> <p>41</p> <p>42</p> <p>43</p> <p>44</p> <p>45</p> <p>46</p> <p>47</p> <p>48</p> <p>49</p> <p>50</p> <p>51</p> <p>52</p> <p>53</p> <p>54</p> <p>55</p> <p>56</p> <p>57</p> <p>58</p> <p>59</p> <p>60</p> <p>61</p> <p>62</p> <p>63</p> <p>64</p> <p>65</p> <p>66</p> <p>67</p> <p>68</p> <p>69</p> <p>70</p> <p>71</p> <p>72</p> <p>73</p> <p>74</p> <p>75</p> <p>76</p> <p>77</p> <p>78</p> <p>79</p> <p>80</p> <p>81</p> <p>82</p> <p>83</p> <p>84</p> <p>85</p> <p>86</p> <p>87</p> <p>88</p> <p>89</p> <p>90</p> <p>91</p> <p>92</p> <p>93</p> <p>94</p> <p>95</p> <p>96</p> <p>97</p> <p>98</p> <p>99</p> <p>100</p> </div> <div> <p>1</p> <p>2</p> <p>3</p> <p>4</p> <p>5</p> <p>6</p> <p>7</p> <p>8</p> <p>9</p> <p>10</p> <p>11</p> <p>12</p> <p>13</p> <p>14</p> <p>15</p> <p>16</p> <p>17</p> <p>18</p> <p>19</p> <p>20</p> <p>21</p> <p>22</p> <p>23</p> <p>24</p> <p>25</p> <p>26</p> <p>27</p> <p>28</p> <p>29</p> <p>30</p> <p>31</p> <p>32</p> <p>33</p> <p>34</p> <p>35</p> <p>36</p> <p>37</p> <p>38</p> <p>39</p> <p>40</p> <p>41</p> <p>42</p> <p>43</p> <p>44</p> <p>45</p> <p>46</p> <p>47</p> <p>48</p> <p>49</p> <p>50</p> <p>51</p> <p>52</p> <p>53</p> <p>54</p> <p>55</p> <p>56</p> <p>57</p> <p>58</p> <p>59</p> <p>60</p> <p>61</p> <p>62</p> <p>63</p> <p>64</p> <p>65</p> <p>66</p> <p>67</p> <p>68</p> <p>69</p> <p>70</p> <p>71</p> <p>72</p> <p>73</p> <p>74</p> <p>75</p> <p>76</p> <p>77</p> <p>78</p> <p>79</p> <p>80</p> <p>81</p> <p>82</p> <p>83</p> <p>84</p> <p>85</p> <p>86</p> <p>87</p> <p>88</p> <p>89</p> <p>90</p> <p>91</p> <p>92</p> <p>93</p> <p>94</p> <p>95</p> <p>96</p> <p>97</p> <p>98</p> <p>99</p> <p>100</p> </div> </div>		
<p>The <i>Edit patient</i> window contains:</p> <ul style="list-style-type: none"> EBMT patient ID; information from the Patient registration Data Collection Form; ProMISe ID for patients registered via the previously used system; Cancel button - to close the window and discard changes; Update patient button - to save any introduced changes to Patient details. 		<p>The <i>Edit donor</i> window contains:</p> <ul style="list-style-type: none"> EBMT donor ID; information from the Donor registration Data Collection Form; ProMISe ID for donors registered via the previously used system; Cancel button - to close the window and discard changes; Update donor button - to save any introduced changes to Donor details.

Table 29, viewing and editing patient/donor details

View Patient/Donor Consent

Please follow the following step-by-step in order to access and view Patient or Donor informed consent-related data fields from the Patient registration DCF or Donor registration DCF:

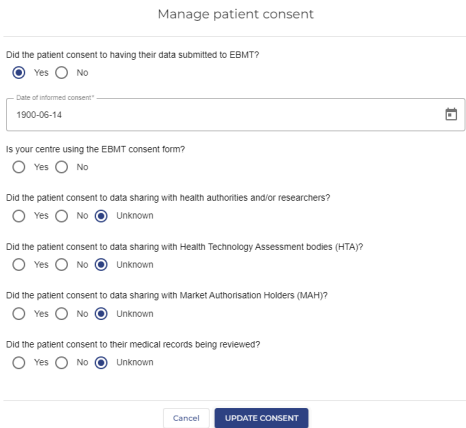
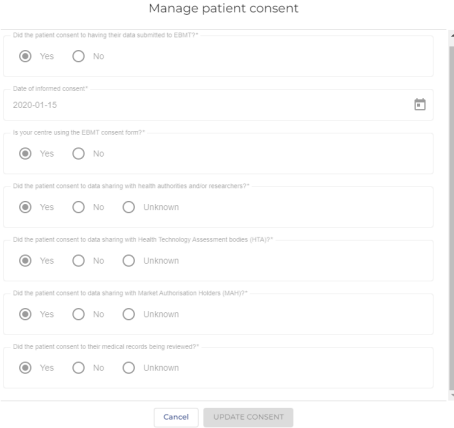
Step	User actions	EBMT Registry
1	Click <i>Manage consent</i> in the <i>Patient menu</i> or in <i>Donor menu</i> .	The <i>Manage Patient Consent</i> or <i>Manage Donor Consent</i> window opens. The fields are visible but greyed out to highlight that they are not editable and disabled. For changing consent information, contact the helpdesk.
		
<p>The <i>Manage patient consent</i> window contains:</p> <ul style="list-style-type: none"> • Patient answers to the consent questions; • Cancel button - to close the window and discard changes; • Update consent button - to save any introduced changes to consent questions. 		<p>The <i>Manage donor consent</i> window contains:</p> <ul style="list-style-type: none"> • Donor answers to the consent questions; • Cancel button - to close the window and discard changes; • Update consent button - to save any introduced changes to consent questions.

Table 30, viewing patient and donor consent in the EBMT Registry

View Patient Studies

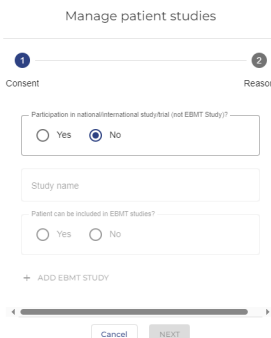
Step	User actions	EBMT Registry
1	Click <i>Manage studies</i> in the <i>Patient menu</i> .	The <i>Manage patient studies</i> window opens.
		
	<p>The <i>Manage patient studies</i> window contains:</p> <ul style="list-style-type: none"> • Information on any non-EBMT studies of the Patient as indicated in the Patient registration form; • Statement if the Patient can or cannot be included into EBMT studies; • +ADD EBMT STUDY button - to add information about EBMT Study once the patient is enrolled. This button is disabled for data viewers. (this button should be used only by EBMT staff) • Cancel button - to close the window and discard changes; • Update studies button - to save any introduced changes to Patient studies questions. This button is disabled for data viewers. 	

Table 31, viewing patient studies

Save system filter as personal filter

Users may save system filter as their personal filter (e.g. to further edit or reuse it). Follow the following step-by-step to perform such action.


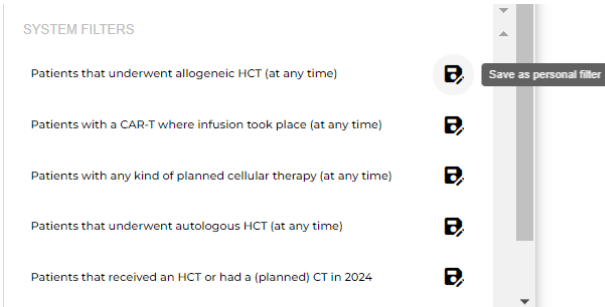

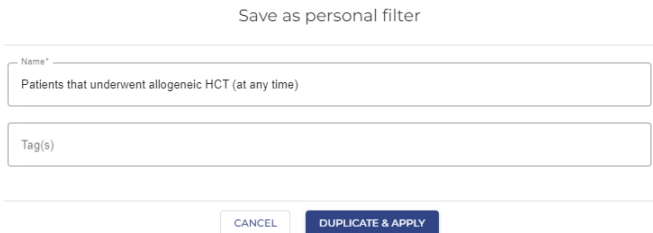
Step	User actions	EBMT Registry
1	In the Patient overview click <i>Filters</i> button to open the list of personal and system filters. Hover the mouse over the icon  to the right from the system filter you want to reuse	The hint will be shown for the system filter
		
	Click the icon 	<p>Save as personal filter window appears. It contains two fields:</p> <p>Name - to name the personal filter to be created, by default it contains the name of the source filter.</p> <p>Tags - to add tags the user wishes for the personal filter to be created.</p> <p>It also contains the following buttons:</p> <p>Cancel - to close the window and cancel the creation of new personal filter;</p> <p>Duplicate and apply - to confirm the action and create a new personal filter with specified in the window name and tags.</p>
		
	Fill-in fields as required and click <i>Duplicate and apply</i> button	The personal filter is saved and applied to the Patients registry list. Filtered list of patients is displayed.

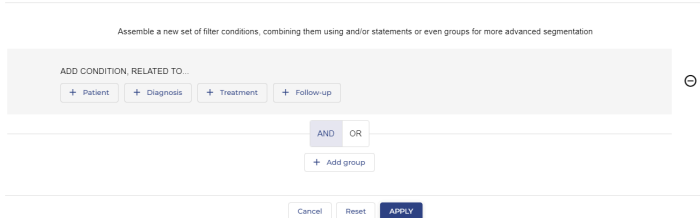
Table 32, saving system filter as a user personal filter


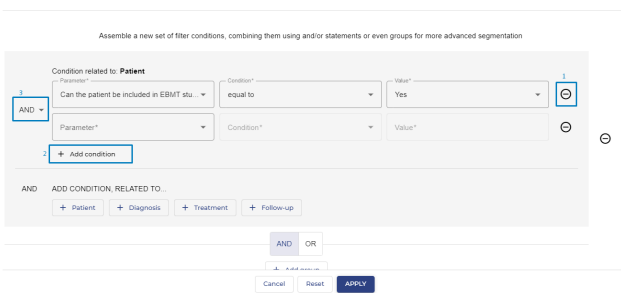
Set up personal filter

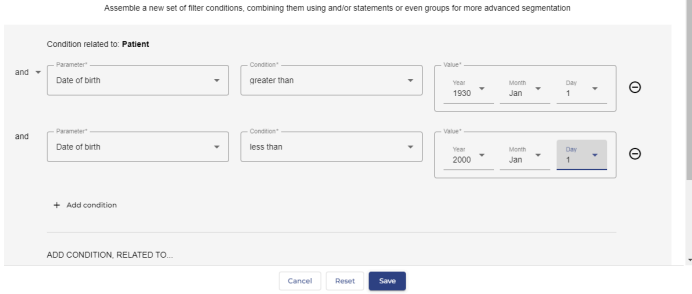
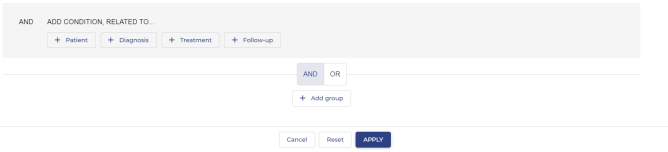
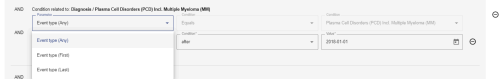
Creating or setting up a personal [filter](#) to filter or search for Patients or Donors follows the below logic:

1. Identify all the data fields that will be [Parameters](#) for the User's personal filter.
 - a. For each data field, identify the event (Data collection form) that contains this data field.
- Due to event versioning in the EBMT Registry, it is also important to identify if the filtering should be done only in one or multiple versions of the event form, the versions should be stipulated at filter creation..
 - b. For each Patient event, identify the event category (if it refers to Patient Diagnosis, Treatment, Follow-up or Other category). There are no event categories for Donors and this step can be skipped.
 - c. For each Event, if there are multiple event types (e.g. Patient underwent multiple auto HCT treatments), will the filter consider all events or only a specific event? If only a specific event is to be considered for this filter, specify if it is the first or the last event from the respective patient timeline.
2. Identify the [Condition](#) and reference [Value](#) for each Parameter (data field). Parameter +Condition + Value will detail filter [Criteria](#).
3. What are the relationships between the filter Criteria? It can be either:
 - a. *and*: e.g. Criteria A and Criteria B and Criteria C;
 - b. *or*: e.g. Criteria A or Criteria B or Criteria C.
4. Will the filter Criteria be divided into separate groups? If yes, how many groups and what are the relationships between the filter groups? It can be either:
 - a. *and*: e.g. (Criteria A and Criteria B) and (Criteria C or Criteria D or Criteria E);
 - b. *or*: e.g. (Criteria A and Criteria B and Criteria C) or (Criteria A and Criteria D and Criteria E).

The process below explains how to set up a personal filter manually from scratch and filter Patients list. For Donor outcome registry follow the same logic choosing Donor-related filter conditions.

Step	User actions	EBMT Registry
1	From the Patient registry overview page click <i>New filter</i> .	The <i>Create a population filter</i> window opens.
		

<p>2a</p>	<p>Click + Patient under <i>Add condition, related to...</i> to specify that data field of interest (filter parameter) that refers to Patient Registration information.</p> <p>If the data field refers to another event category (not to Patient Registration but to Treatment, Diagnosis, Follow-up), choose the correct one by clicking + [Name of Event Category] button and follow the same logic.</p>	<p>The filter Criteria 1 is shown (Parameter, Condition, Value are 3 dropdown fields) to specify criteria that refer to the Patient Registration form.</p> <ol style="list-style-type: none"> 1. The minus icon  is shown to the right from the filter criteria. It can be used to delete/remove this whole filter criteria regardless of whether it is empty or filled in with data. 2. +Add condition button is shown under filter criteria and can be used to add one more filter criteria that refers to Patient Registration 3. Use <i>and/or</i> toggle button to the left from filter Criteria 1 to specify the relationship between this condition and the following ones. This toggle is shown when 2 or more criteria are shown.
		
<p>3a</p>	<p>Specify filter Criteria 1 using the dropdowns with answer options (Parameter, Condition, Value).</p>	<p>Selected Parameter, Condition and Value are displayed in filter Criteria 1. These fields remain active and can be amended at any point of setting up the filter.</p>
<p>4a</p>	<p>Click +Add condition under displayed filter Criteria if you need to add one more filter Criteria that refers to the Patient Registration form.</p>	<p>Filter Criteria 2 (Parameter, Condition, Value are 3 dropdown fields) to specify criteria that refers to the Patient Registration form is shown.</p>

		
	<p>Specify filter Criteria 2 using the dropdowns with answer options (Parameter, Condition, Value).</p>	<p>Selected Parameter, Condition and Value are displayed in filter Criteria 2. These fields remain active and can be amended at any point of setting up the filter.</p>
2b	<p>Click the + [Name of Event Category] under <i>Add condition, related to..</i> to specify to which event category the Event with a data field of the interest (filter parameter) belongs. Event Categories are shown as buttons with the plus sign before the name.</p>	<p>The list of events in the chosen Event category is shown.</p> <p>The Event category name is clickable and can be used to go 1 Step back.</p>
		
3b	<p>Click + [Name of Event] under <i>Condition related to [Name of the event category]</i> to specify what event contains the data field of interest (filter parameter). Events are shown as buttons with plus sign before the name.</p>	<p>Filter Criteria 3 is shown (Parameter, Condition, Value are 3 dropdown fields) to specify the criteria that refers to the chosen Event.</p> <p>An additional line under <i>Condition related to: [Name of Event]</i> is displayed with a field that describes the Event type. Answer Any is chosen by default, use the dropdown to select from the answer options: Any, First, Last, if needed to specify that the Criteria refer only to one particular event from the Patient timeline.</p> 

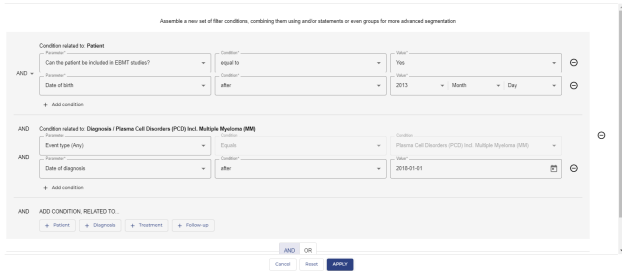
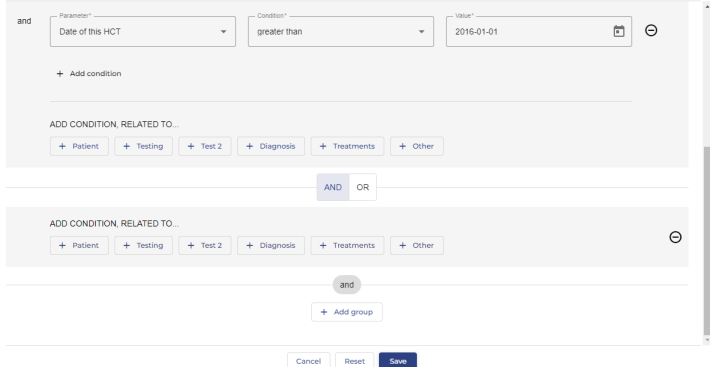
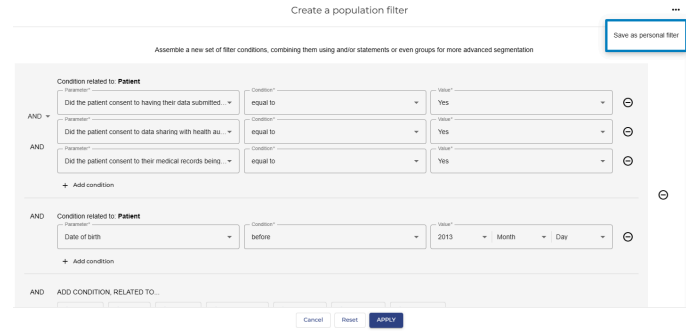
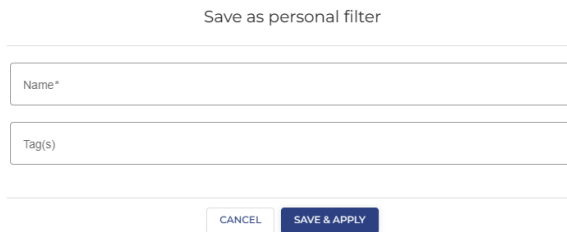
		
4b	Specify filter Criteria 3 using the dropdowns with answer options (Parameter, Condition, Value).	Selected Parameter, Condition and Value are displayed in filter Criteria 3. These fields remain active and can be amended at any point of setting up the filter.
	Follow the Steps 3a - 4a to add and specify more condition(s) that refer to the chosen Event, if needed.	
	Follow the Steps 2b-4b to add and specify more conditions that refer to any <i>other Event</i> , if needed.	
5	Click the +Add group button at the bottom of the window to add one more group of conditions, if needed.	<p>The new Group of conditions for set up is shown.</p> <ol style="list-style-type: none"> 1. Use the AND/OR toggle button shown before the group of conditions 2 to specify the relationship between these groups.
		
	For the New group of Conditions follow the Steps 2a-4a or 2b-4b to add and specify conditions that refer to the Patient registration form or Patient Event.	
6	Click the <i>Apply</i> button to apply the filter.	Patient Registry overview page shows filtered list of Patients.

Table 33, making a personal filter and saving it

Save personal filter

The process below explains how to save an already set up personal filter.

Step	User actions	EBMT Registry
1	Set up personal filter that you would like to save.	Click on the three dots icon to call the menu.
		
2	Click Save as personal filter in the appeared menu.	<p>Save as personal filter window appears. It contains two fields:</p> <p>Name - to specify the name of filter. It will be later shown in the dropdown list of saved personal filters.</p> <p>Tag(s) - to enter and save some tags, later to find this filter more easily in the list of saved filters.</p> <p>It also contains the following buttons:</p> <p>Cancel button- to cancel the action and close the window.</p> <p>Save and Apply button - to save the personal filter and apply it filtering the list.</p>
		

3	<p>Enter the Name you want to assign to this filter into the 1st field Name.</p> <p>Enter tags into the 2nd field Tag(s): type the tag name and press Enter every time you want to have it entered as a tag.</p> <div data-bbox="304 450 783 510"> <p>Tag(s)</p> <p>Paediatrics 2013 PCDAfter2013</p> </div> <p>Tags may include letters and numbers without space. If a space is used while naming a tag, the system will show an error. Such tag needs to be removed and entered again in the correct format</p> <div data-bbox="304 734 783 817"> <p>Tag(s)</p> <p>Children PCD</p> <p>each value in tags must contain only letters and numbers</p> </div> <p>Click <i>Save and Apply</i> button to save the filter.</p>	<p><i>Save as personal filter</i> window closes. The filter is saved and applied to the overview list. Filtered list is loaded in the main screen.</p> <p>The name of the filter and number of conditions it contains is shown above filtered list.</p> <p>The filter is now shown in the list of saved personal filters.</p>
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Patient Registry Admin

FILTERS PCDAfter2013 (2 conditions defined) EDIT FILTER EXPORT RESULTS (4) + ADD PATIENT

<input type="checkbox"/>	Short ID	Registration CIC	Registration centre name	UPN	Date of birth	Sex at birth	Date of last event	Last modified	
<input type="checkbox"/>	51021ec	1011	demo centre 1011	1234568	2020-01-02	Female	2023-07-21	2023-07-21	...
<input type="checkbox"/>	93e15bf	12	demo centre 12	12312	2018-02-02	Male	2023-06-01	2023-06-14	...
<input type="checkbox"/>	76812e6	17	demo centre 17	123	2016-02-03	Male	2023-05-10	2023-06-15	...
<input type="checkbox"/>	c55b004	17	demo centre 17	1234	2019-02-03	Male	2023-05-11	2023-06-15	...

4 results Items per page: 20 1 - 4 of 4 < >

Patient Registry

Admin

FILTERS

+ NEW FILTER

Search for personal filters by name or tag

PCDAfter2013

UPN

Date of birth

Sex at birth

Date of last event

Last modified

FAKE1

1978-12-10

Female

2023-05-15

2023-07-19

...

007

1960-01-10

Male

2023-07-01

2023-07-06

...

1234568

2020-01-02

Female

2023-07-21

2023-07-21

...

e72ae9

1011

demo centre 1011

789654

2007-10-15

Female

/

2023-05-25

...

fe4c526

1005

demo centre 1005

1

1950-04-28

Male

2023-06-15

2023-06-10

...

2fa83c

1016

demo centre 1016

123456

2001-03

Female

2023-08-26

2023-06-13

...

89ada04

1003

demo centre 1003

8999

1973-03

Male

2022-02-02

2023-06-12

...

5d95dc9

616

General Test

006

1984-10-08

Female

2023-01-05

2023-06-22

...

Table 34, making a personal filter and saving it

Patient Registry								
<div> <div>PCDafter2013 (3 conditions defined)</div> <div>EDIT FILTER</div> <div>EXPORT RESULTS (24)</div> <div>ADD PATIENT</div> </div>								
<input type="checkbox"/>	Short ID	Registration CIC	Registration centre name	UPN	Date of birth	Sex at birth	Date of last event	Last modified
<input type="checkbox"/>	fb4c526	1005	demo centre 1005	1	1950-04-28	Male	2023-06-15	2023-06-10
<input type="checkbox"/>	25f853c	1016	demo centre 1016	123456	2001-03	Female	2023-08-26	2023-06-13
<input type="checkbox"/>	89a0304	1003	demo centre 1003	8999	1973-03	Male	2022-02-02	2023-06-12
<input type="checkbox"/>	5d639de	616	General Test	006	1984-10-08	Female	2023-01-05	2023-06-22
<input type="checkbox"/>	0446e65	1003	demo centre 1003	73-99	1980-01-02	Male	2020-03-02	2023-06-29

Table 35, editing a personal filter

Delete personal filter

Note: deletion of a personal filter is not reversible action. It is not possible to restore deleted filters.

The process below explains how to delete any saved personal filter.


Step	User actions	EBMT Registry
1a	<p>Open the Edit personal filter window as explained here. Click Filter menu icon and then Delete personnel filter option.</p> 	<p>The warning window will appear asking for confirmation on requested action. It contains: <i>Cancel</i> button - to cancel the request and return to Edit personal filter window. <i>Delete personal filter</i> button - to confirm the deletion of this personal filter.</p>
2	<p>Click the <i>Delete personal filter</i> button to confirm the deletion.</p>	<p>This personal filter is deleted from the system and thus removed from the list of saved personal filters. Unfiltered overview list is loaded in the main screen</p>

Table 36, deleting a personal filter

Duplicate personal filter

The process below explains how to duplicate or create a copy of any saved personal filter.

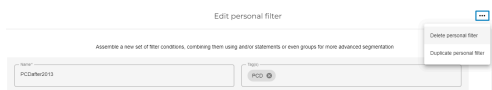
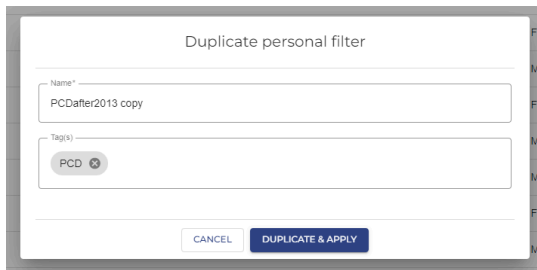
Step	User actions	EBMT Registry																																								
1	<p>Open the Edit personal filter window as explained here. Click <i>Filter menu</i> icon and then <i>Duplicate personnel filter</i> option.</p> 	<p>The <i>Duplicate personal filter</i> window will appear.</p> <p>It contains:</p> <p><i>Name</i> field - to enter the name of duplicate filter. By default this field contains the name of the original filter followed by the word copy.</p> <p><i>Tags</i> field - to enter the tags for the duplicate filter. By default this field contains the tags of the original filter.</p> <p><i>Cancel</i> button - to cancel the request and return to <i>Edit personal filter</i> window.</p> <p><i>Duplicate personal filter</i> button - to confirm saving the duplicate of this personal filter with entered into the <i>Duplicate personal filter</i> window name and tags.</p>																																								
																																										
2	<p>Edit the Name and Tag(s) fields of the <i>Duplicate personal filter</i> window as required.</p> <p>Click <i>Duplicate personal filter</i> button to confirm the action.</p>	<p>The duplicate filter is saved and applied to the overview list. Filtered list is loaded in the main screen.</p> <p>The name of the filter and number of conditions it contains is shown above the filtered list.</p> <p>The filter is now shown in the list of saved personal filters.</p>																																								
<div><div><p>Patient Registry</p><p>PCDafter2013 copy (3 conditions defined)</p><table><tr><th>Short ID</th><th>Registration CIC</th><th>Registration centre name</th><th>UPN</th><th>Date of birth</th><th>Sex at birth</th><th>Date of last event</th><th>Last modified</th></tr><tr><td>9a6c36</td><td>1005</td><td>demo centre 1005</td><td>1</td><td>1950-04-28</td><td>Male</td><td>2023-06-15</td><td>2023-06-10</td></tr><tr><td>2f8f3c</td><td>1016</td><td>demo centre 1016</td><td>123456</td><td>2001-03</td><td>Female</td><td>2023-08-26</td><td>2023-06-13</td></tr><tr><td>8baad04</td><td>1003</td><td>demo centre 1003</td><td>8999</td><td>1973-03</td><td>Male</td><td>2022-02-02</td><td>2023-06-12</td></tr><tr><td>5d93de</td><td>616</td><td>General Test</td><td>006</td><td>1984-10-08</td><td>Female</td><td>2023-01-05</td><td>2023-06-22</td></tr></table></div><div><p>Patient Registry</p><p>PCDafter2013</p><p>PCDafter2013 copy</p></div></div>			Short ID	Registration CIC	Registration centre name	UPN	Date of birth	Sex at birth	Date of last event	Last modified	9a6c36	1005	demo centre 1005	1	1950-04-28	Male	2023-06-15	2023-06-10	2f8f3c	1016	demo centre 1016	123456	2001-03	Female	2023-08-26	2023-06-13	8baad04	1003	demo centre 1003	8999	1973-03	Male	2022-02-02	2023-06-12	5d93de	616	General Test	006	1984-10-08	Female	2023-01-05	2023-06-22
Short ID	Registration CIC	Registration centre name	UPN	Date of birth	Sex at birth	Date of last event	Last modified																																			
9a6c36	1005	demo centre 1005	1	1950-04-28	Male	2023-06-15	2023-06-10																																			
2f8f3c	1016	demo centre 1016	123456	2001-03	Female	2023-08-26	2023-06-13																																			
8baad04	1003	demo centre 1003	8999	1973-03	Male	2022-02-02	2023-06-12																																			
5d93de	616	General Test	006	1984-10-08	Female	2023-01-05	2023-06-22																																			

Table 37, duplicating a personal filter

View anonymous events

The process below explains how to access and view [anonymous events](#) in the user [Context](#).

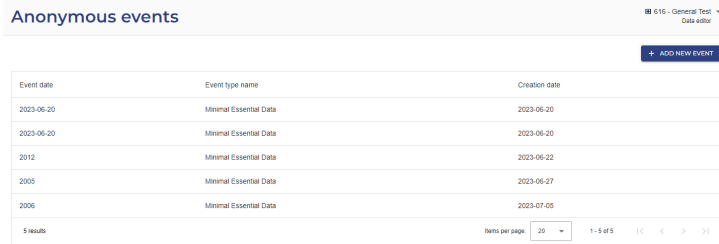
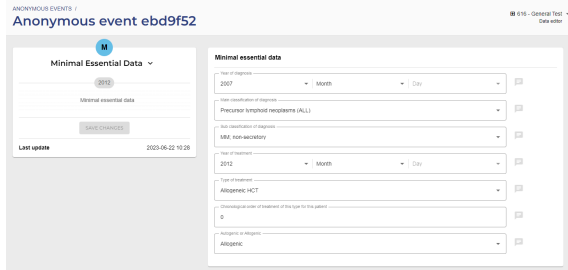
Step	User actions	EBMT Registry
1	Click <i>Anonymous events</i> in the Navigation menu .	Anonymous events overview page opens
		
2	Click the event you wish to open and view.	The Anonymous event is loaded and shown on the main screen.
		

Table 38, viewing anonymous events

Print Patient or Donor Event

Since the EBMT Registry is a web application, users are always able to print the webpage through the toolbar of their web browser or a keyboard shortcut.

The process below explains how to print a Patient or Donor Event form as displayed in the system user interface with EBMT Registry built-in functionality. The print document produced by the EBMT Registry is more user-friendly compared to the standard browser one.

Remember that printing document contains sensitive patient or donor data and all security measures should be applied.

Step	User actions	EBMT Registry
1	Open the Patient event that you wish to print. Click on <i>Print</i> in the Event form summary.	The confirmation warning appears. It contains the following buttons: <i>Cancel</i> - to cancel the printing request and return to the patient event form. <i>I understand</i> - to confirm the user agrees and understand the shown warning and agrees to comply with the mentioned statement.
	<div style="text-align: center;"> <p>Sensitive patient data</p> <hr/> <p>All users of the EBMT Registry must comply with the EBMT Registry Conditions of Use, Data Protections laws in existence in each individual country, and the General Data Protection Regulations (GDPR 2016/679). By proceeding with this export, I understand that I am downloading sensitive patient- and/or donor-related data from the EBMT Registry and I agree to comply with the requirements mentioned above.</p> <hr/> <p>CANCEL I UNDERSTAND</p> </div>	
2	Read carefully the warning and click <i>I understand</i> to confirm and proceed to printing. Or click Cancel to cancel the printing.	The event form is transformed into a file in pdf format and downloaded to the users computer. (into Downloads folder) ready to be printed.

Table 39, printing patient or donor events

The printed version of an event received as a result of the currently explained process is not identical to the paper version of a Data Collection Form because it does not show answer options to data fields, does not display questions dependent on other factors than entered values, etc.


Data Editor-related functionality

The EBMT Registry was designed so that users can fill a paper Data Collection Form first and then enter the information into the EBMT Registry, or fill the information online directly. The use of the EBMT Registry online platform is preferred, as it saves time, avoiding mistakes while transferring data from paper to the EBMT Registry, the system will also check for potential errors (validation checks) and navigate the user through the required fields (depending on answer to a question, dependant sub questions appear).

Reminder: It is important to save changes regularly during the data entry process.

Add Patient

The process below explains how to register (add) a new patient to the EBMT Registry.

Step	User actions	EBMT Registry
1	<p>From the Patient Registry overview page click <i>Add patient</i> button.</p> 	<p><i>Add a new patient</i> window opens. It contains data fields from the a Patient registration form and is represented as 3 steps form (it can be considerate as 3 pages or sections of the same form):</p> <ol style="list-style-type: none"> Patient consent - contains data fields related to the Patient Informed consent. Patient information - includes data fields related to the general patient registration data (UPN, birthdate, initials, etc.). Patient studies - data fields to inform if a patient is part of any non-EBMT study and study-related data. <p>At the bottom of the form there are shown the following buttons:</p> <p>Cancel - use this button to cancel new Patient creation. The Add a new patient window will be closed, already entered information, if any, will be lost.</p> <p>Next - use this button to proceed to the next step (page) of the registration form.</p>

Add a new patient

1 Patient consent
2 Patient information
3 Patient studies

Do the patient consent to having their data submitted to EBMT?

First date of informed consent*

Is your centre using the EBMT consent form?

Do the patient consent to data sharing with health authorities and/or researchers?

Do the patient consent to data sharing with Health Technology Assessment bodies (HTA)?

Do the patient consent to data sharing with Medical Automation Industries (MAI)?

Do the patient consent to their medical records being viewed?

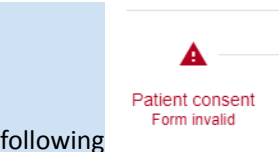
Cancel Next

2

Answer questions in the Patient consent section. Remember to add the Date of the Patient informed consent.

Click the *Next* button at the bottom of the *Add a new patient* window.

It is important that all questions of this section are mandatory and shall not be left blank. If a user proceed to next sections of the *Add a new patient*, the title of the Patient consent section will be marked with an Error and shown as



following

The Patient registration section will be shown in the *Add a new patient* window.

At the bottom of the form there are shown the following buttons:

Cancel (explained in the Step 1).

Previous - use this button to go back to the previous section Patient consent (Step 1).

Next (explained in Step 1).

Data editors in VR context that Add a new patient will see one extra data field **Centre**, where they must specify the registration centre for this Patient.

Add a new patient

1 Patient consent
2 Patient information
3 Patient studies

Hospital unique patient number or code (UPN)*

Date of birth*
year | Month | Day

Initials first name | Initials last name
The initials fields are mandatory for all centres where the local laws allow for this information to be shared with EBMT.

Ethnicity | Postal code


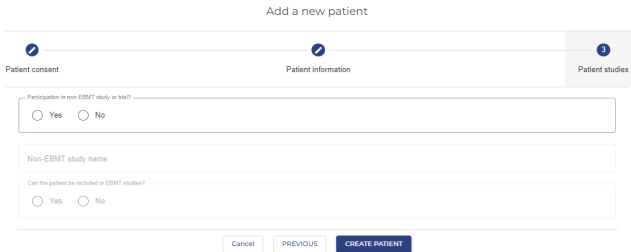
Only for UK

Sex at birth*
☐ Male ☐ Female

Bloodgroup*
☐ A ☐ B ☐ AB ☐ O

Rhesus factor*
☐ - ☐ + ☐ Not evaluated ☐ Unknown

Cancel PREVIOUS NEXT

<p>3</p>	<p>Answer questions in the Patient registration section.</p> <p>Click the <i>Next</i> button at the bottom of the <i>Add a new patient</i> window.</p> <p>UPN number is a very important data field that should be entered correctly at this step. Please check it is correct before proceeding.</p> <p>All data fields (except Ethnicity and Postal code) are shown as mandatory and shall be filled in. If a user proceeds to the next section of the <i>Add a new patient</i> or returns to a previous one, the title of the Patient registration section will be marked with an Error and shown as following:</p>  <p>Due to legal restrictions in some countries, in rare cases patients initials may not be reported, the field will still be highlighted with an error, but it will not block Adding a new Patient to the EBMT Registry.</p>	<p>The Patient studies section will be shown in the <i>Add a new patient</i> window.</p> <p>At the bottom of the form there are shown the following buttons:</p> <p>Cancel (explained in the Step 1).</p> <p>Previous - use this button to go back to the previous section Patient consent (Step 1).</p> <p>Create patient - the button to confirm Adding a new patient to the EBMT Registry with registration data entered in the <i>Add a new patient</i> window.</p>
		

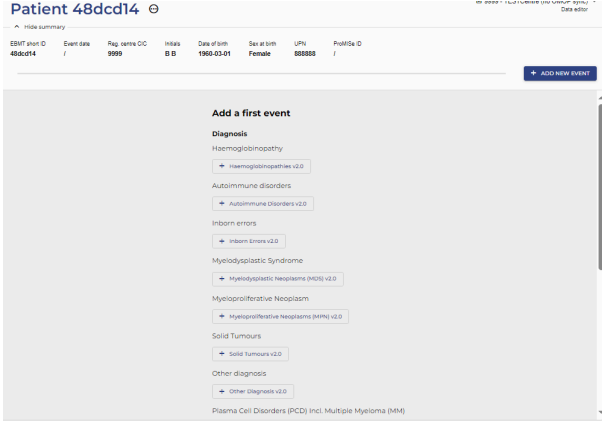
4	<p>Answer questions in the Patient studies section.</p> <p>Click the <i>Create patient</i> button at the bottom of the <i>Add a new patient</i> window.</p>	<p>If all mandatory fields were filled in the <i>Add a new patient</i> window, the patient duplicate check will be performed and, if it is successful, the new Patient is successfully created in the EBMT Registry and the Patient page is shown in the main screen.</p> <p>If the data of the patient the user is trying to register is matching the data of an existing patient, there will be shown the warning or error message as explained in details in the Duplicate check section.</p> <p>If there is missing information in the mandatory fields, the corresponding section of the form is highlighted with an error, the data field is highlighted in red. <i>The Create patient</i> button may be clicked, but the <i>Add a new patient</i> window remains open. Add information to the mandatory fields and click the <i>Create patient</i> button.</p>
		

Table 40, instructions on how to add a patient to the EBMT Registry

Add Donor

The process below explains how to register (add) a new donor to the EBMT Registry.

Step	User actions	EBMT Registry
1	From the Donor outcomes registry overview page click <i>Add donor</i> .	<p><i>Add a new donor</i> window opens. It contains data fields from the a Donor registration form and is represented as 2 steps form (it can be considerate as 2 pages or sections of the same form):</p> <ol style="list-style-type: none"> Donor consent - contains data fields related to the Donor Informed consent. Donor information - includes data fields related to the general donor registration data (GRID, Donor ID, birthdate, initials, etc.). <p>At the bottom of the form there are shown the following buttons:</p> <p>Cancel - use this button to cancel new Donor creation. The Add a new donor window will be closed, already entered information, if any, will be lost.</p> <p>Next - use this button to proceed to the next step (page) of the registration form.</p>

Add a new donor

1

2

Donor consent
Donor information

Did the donor consent to having their data submitted to EBMT?
☐ Yes ☐ No

First date of informed consent*


Is your centre using the EBMT consent form?
☐ Yes ☐ No

Did the donor consent to data sharing with health authorities and/or researchers?
☐ Yes ☐ No ☐ Unknown

Did the donor consent to data sharing with Health Technology Assessment bodies (HTA)?
☐ Yes ☐ No ☐ Unknown

Did the donor consent to their medical records being reviewed?
☐ Yes ☐ No ☐ Unknown

Cancel NEXT

2	<p>Answer questions in the Donor consent section. Remember to add the Date of the Donor informed consent.</p> <p>Click the <i>Next</i> button at the bottom of the <i>Add a new donor</i> window.</p> <p>It is important that all questions of this section are mandatory and shall not be left blank. If a user proceeds to the next section of the <i>Add a new donor</i>, the title of the Donor consent section will be marked with an Error and shown as following</p> 	<p>The Donor information section will be shown in the <i>Add a new donor</i> window.</p> <p>At the bottom of the form there are shown the following buttons:</p> <p>Cancel (explained in the Step 1).</p> <p>Previous - use this button to go back to the previous section Donor consent (Step 1).</p> <p>Create donor - the button to confirm Adding a new donor to the EBMT Registry with registration data entered in the <i>Add a new donor</i> window.</p> <p>Data editors in VR context that Add a new donor will see one extra data field Centre, where they must specify the registration centre for this Donor.</p>
---	---	--

Add a new donor

1

2

Donor consent

Donor information

GRID

Donor number*

Date of birth*

year

Month

Day

Initials first name

Initials last name

The initials fields are mandatory for all centres where the local laws allow for this information to be shared with EBMT.

The initials fields are mandatory for all centres where the local laws allow for this information to be shared with EBMT.

Sex of birth*

Male

Female

Cancel

PREVIOUS

CREATE DONOR

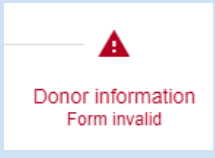
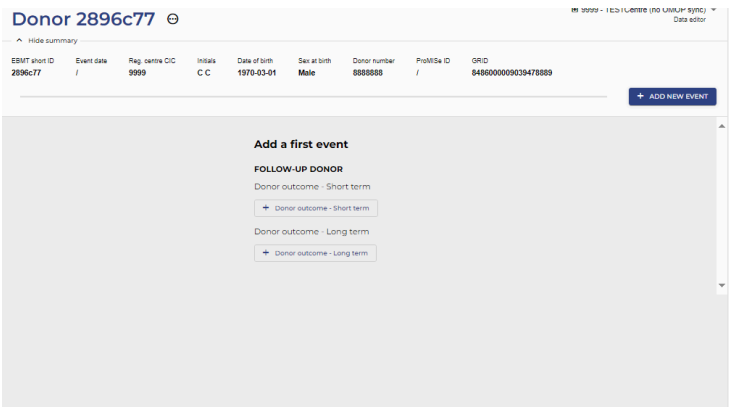
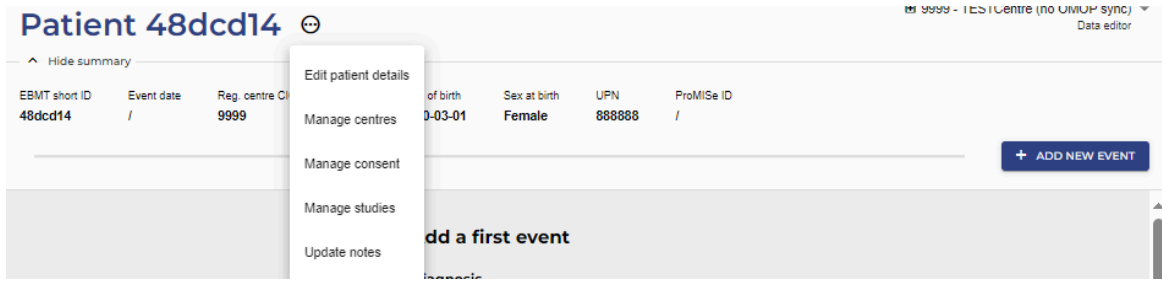
3	<p>Answer questions in the Donor information section.</p> <p>Click the <i>Create donor</i> button at the bottom of the <i>Add a new donor</i> window.</p> <p>If a user returns to a previous section, the title of the Donor registration section will be marked with an Error and shown as following:</p>  <p>Due to legal restrictions in some countries, in rare cases donor initials may not be reported, the field will still be highlighted with an error, but it will not block Adding a new donor to the EBMT Registry.</p>	<p>If the data is entered correctly, the new Donor is successfully created in the EBMT Registry and the Donor page is shown in the main screen.</p> <p>If there is missing information in the mandatory fields, the corresponding section of the form is highlighted with an error, the data field is highlighted in red. <i>The Create donor</i> button may be clicked, but the <i>Add a new donor</i> window remains open. Add information to the mandatory fields and click the <i>Create patient</i> button.</p>
		

Table 41, instructions on how to add a donor to the EBMT Registry

Edit Patient details

Please follow the following step-by-step in order to edit Patient general details-related data fields from the Patient registration DCF:

- A. date of birth;
- B. initials for name;
- C. initials for surname;
- D. Ethnicity; (should be entered only for UK centres)
- E. postal code; (should be entered only for UK and France centres)
- F. sex at birth;
- G. blood group;
- H. rhesus factor.

Step	User actions	EBMT Registry
1	In the Patient page click on the three dots button to the right from the Patient short ID to call the Patient menu.	The patient menu will open.
		
2	Click on Edit patient details in the Patient menu.	<p>The Edit patient window will appear.</p> <p>It is 2 steps form (it can be considerate as 2 pages or sections of the same form):</p> <ol style="list-style-type: none"> Patient information - includes data fields related to the general patient registration data (UPN, birthdate, initials, etc.). Reason - data field to inform about the reason for the change. <p>At the bottom of the form there are shown the following buttons:</p> <p>Cancel - to discard the changes. Use this button to close the Edit patient window without saving any changes done.</p> <p>Next - use this button to proceed to the next step (page) of the form. The button is active only if data editor edited any field of the form.</p>

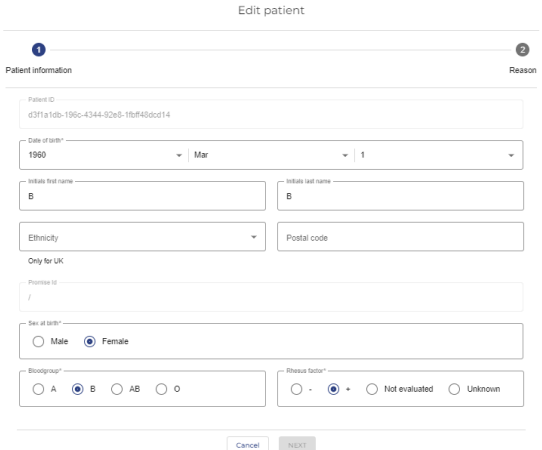
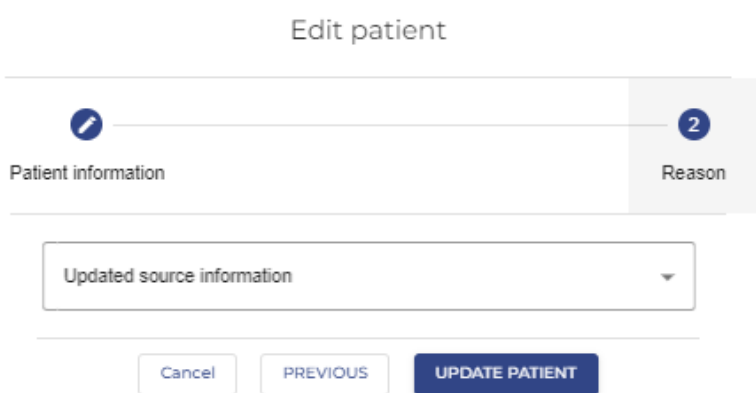
Step	User actions	EBMT Registry
		
5	<p>Edit required fields. Click the <i>Next</i> button to proceed to the next step.</p>	<p>The <i>Edit patient</i> window: reason for changes will be shown. There are shown the following buttons at the bottom of the window:</p> <p>Cancel - to discard the changes. Use this button to close the Update this patient window without saving any changes done. Previous - to go back to editing patient information. Update patient - to save changes and close Edit patient window.</p>
		
6	<p>Enter the reason for the changes:</p> <ul style="list-style-type: none"> Updated source information Data entry error/mistake <p>Click the <i>Update patient</i> button.</p>	<p>The <i>Edit patient</i> window disappears. Patient page is displayed at the main screen.</p>

Table 42, instructions on how to update patient information

Note: The Edit patient window also shows the EBMT Patient ID (log ID) if it is required to see this information through the user interface. This field is not editable but for information purposes only.

Edit patient

Patient ID: 48dcd14-4212-4358-8f5c-12020a919d3f

Date of birth: 2018 / Month / Day

Initial first name: YY Initial last name: YY

Ethnicity: Asian or Asian British - Bangladeshi / Postal code: /

ProMIS ID: /

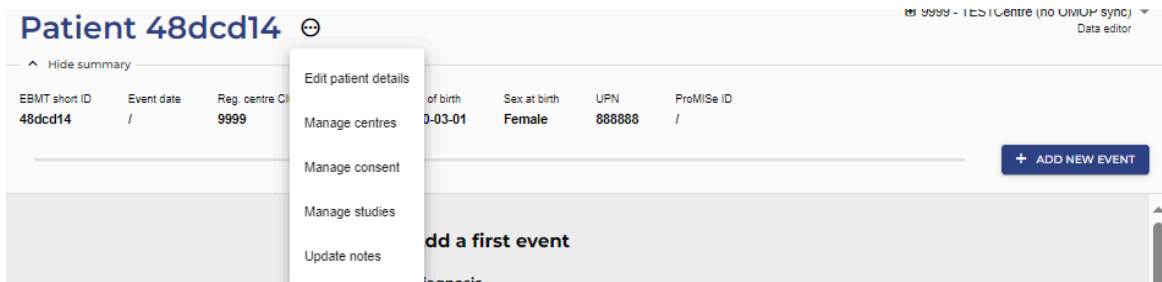


Sex at birth: ☒ Male ☐ Female

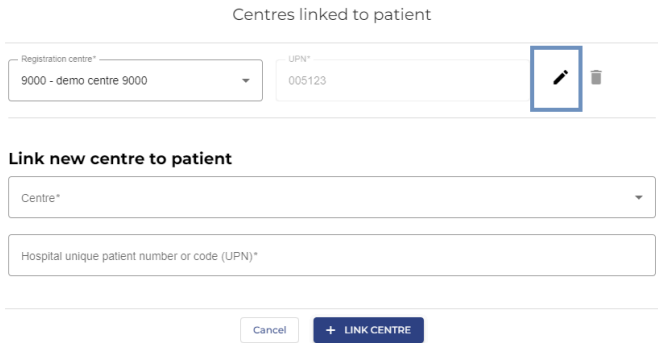


Biological sex: / Phenotypic sex: /

Cancel UPDATE PATIENT

Edit Patient UPN

Data editors can update the patient UPN, if needed. Follow the instructions below to update or edit the Patient UPN

Step	User actions	EBMT Registry
1	In the Patient page click on the three dots button to the right from the Patient short ID to call the Patient menu.	The patient menu will open.
		
2	Click on Manage centres in the Patient menu.	<p>The <i>Centres linked to patient</i> window will appear.</p> <p>There are listed centres linked to this patient and UPNs per centre.</p> <p>The UPN field is shown as disabled (greyed out). Next to the UPN field there are shown edit icon  and delete icon .</p> <p>Note: data editors cannot delete the patient UPN or the link between the centre and the patient. Should data editor click this button, the system will show an error.</p> <p>The <i>Centres linked to patient</i> window also contains administrator-related fields to link a new centre to the patient. For data editors it is not possible to link new centres, thus such fields should not be used.</p>

Step	User actions	EBMT Registry
		<p>At the bottom of the form there are shown the following buttons:</p> <p>Cancel - to discard the changes. Use this button to close the <i>Centres linked to patient</i> window.</p> <p>+Link centre - data editors are not able to link new centres to a patient, thus clicking this button will cause system showing an error to data editors.</p>
		
3	Click the edit icon next to the patient UPN in the <i>Centres linked to patient</i> window.	<p>The UPN field is shown in edit mode, there are icons to confirm and save changes ✓ or to cancel and close the field without saving any changes ✕ .</p>
		
4	Edit the patient UPN as required and click confirm icon ✓	<p>The Updated UPN is saved in the UPN field. The field is shown as disabled.</p>
		

Step	User actions	EBMT Registry
5	Click Cancel button at the bottom of the <i>Centres linked to patient</i> window.	The <i>Centres linked to patient</i> window disappears. The patient page is updated. New patient UPN is shown in the Patient summary.

Table 43, editing patient UPN in the EBMT Registry

Edit Patient consent

Follow the instructions below to update or edit the Patient informed consent related data, in particular:

1. Remove consent to having patient data submitted to EBMT

Important: if the patient withdraws the consent (answer is changed to No), the application will ask for the date of the patient consent withdrawal, the patient page will be turned to Read only mode. This means that already submitted data will remain visible, but it will not be possible to add new events data.

Patient data and events are not removed from the EBMT registry in this case. If this action happened accidentally, please contact EBMT Registry Helpdesk to request reversing such action and explaining all the details of the case.

2. Change the informed consent date:

At patient registration, a data editor enters the **First informed consent date**. This is the date the first informed consent was given (with signed informed consent form) by the patient or their legal guardian to having their data submitted to EBMT. (Please see more details in the Guide to the completion of the EBMT data collection form: Patient_registration_v2.0 available on the EBMT website)

In the scenario that a patient has been transferred from another hospital where consent was already collected, the new centre is responsible for obtaining the patient's consent (its date shall be recorded in the data field the Most recent informed consent date) and providing evidence of the consent acceptance following GDPR and their local regulations. The first date of consent from the previous hospital will be maintained since it is when the patient-EBMT relation was authorised.

Note: once First date of informed consent is added to the EBMT Registry, this field cannot be edited. Please contact EBMT Registry helpdesk if it is required to correct this data field, specifying all the details and the reason for such change.

Most recent informed consent date - is the date the latest informed consent form was signed by the patient or their legal guardian.

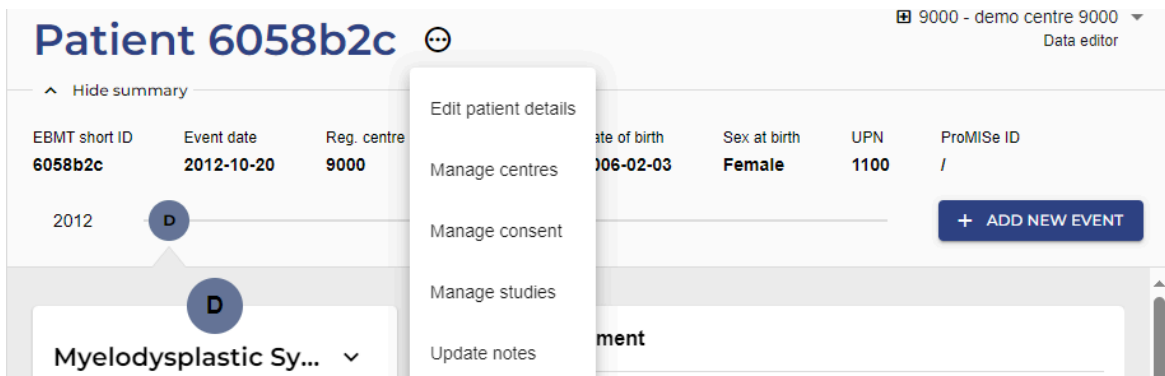
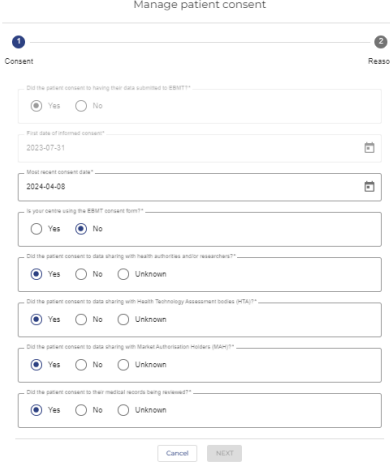
In the EBMT Registry initially this field is pre-populated with the date entered into the First informed consent date and it shall be edited/updated by the centre in case the patient or their legal guardian signed an informed consent form different from the form registered in the first informed consent field above.

For some patients this field is empty, this is due to the fact that this data field was added to the database after patient was created. Please note, that the system logic is not affected in this case.

Note: this date shall be edited in the EBMT Registry whenever the patient or their legal guardian signs a new informed consent form. The remaining questions of this section below should always reflect the patient details as per the most recent informed consent form signed.

3. Update or edit other consent-related questions.

Step	User actions	EBMT Registry
1	In the Patient page click on the three dots button to the right from the Patient short ID to call the Patient menu.	The Patient menu will open.

Step	User actions	EBMT Registry
		
2	Click on Manage consent in the Patient menu.	<p>The <i>Manage patient consent</i> window will appear. There are shown the following buttons at the bottom of the window:</p> <p>Next - to proceed to the next step of updating patient consent data. The button is active (enabled) only if any field in the form was edited.</p> <p>Cancel - to discard the changes. Use this button to close the Manage patient consent window without saving any changes done.</p>
		
3	<p>Edit required fields.</p> <p>Click the <i>Next</i> button to proceed with the changes.</p> <p>If the changes due to signing a new ICF, make sure to enter the date into the field Most recent consent date.</p>	<p>The Manage patient consent window: reason for changes will be shown.</p> <p>There are shown the following buttons at the bottom of the window:</p> <p>Cancel - to discard the changes. Use this button to close the Manage patient consent window without saving any changes done.</p> <p>Previous - to go back to the editing of the patient consent data.</p> <p>Update consent - to save changes and close Manage patient consent window.</p>

Step	User actions	EBMT Registry
	<div> <div>Manage patient consent</div> <div> <div>1</div> <div>Consent</div> </div> <div> <div>2</div> <div>Reason</div> </div> <div> <div>Updated source information</div> <div></div> </div> <div> <div>Cancel</div> <div>PREVIOUS</div> <div>UPDATE CONSENT</div> </div> </div>	
4	Enter the reason for the changes: <ul style="list-style-type: none"> Updated source information Data entry error/mistake Click the <i>Update consent</i> button.	The patient consent-related data is updated. The <i>Manage patient consent</i> window disappears. Patient page is displayed at the main screen.

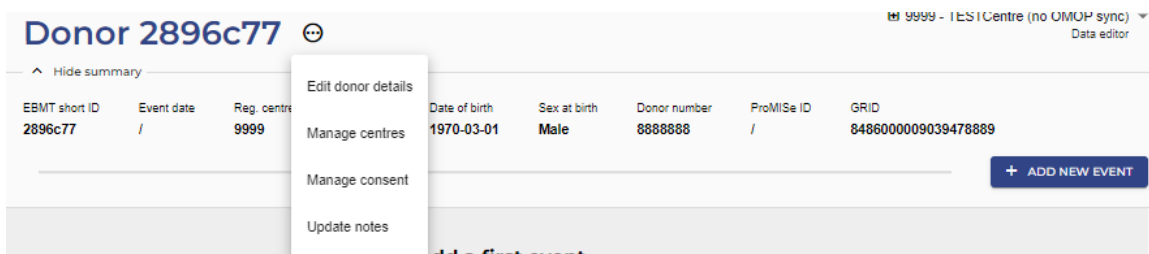
Table 44, editing patient consent in the EBMT Registry

Note: If a patient besides removing the consent to share data with EBMT specifically requests that patient data is removed from EBMT Registry, please contact EBMT Registry Helpdesk. Only Administrator can delete patient from the database.

Edit Donor details

Please follow the following step-by-step in order to edit Donor general details and related data fields from the Donor registration DCF:

- A. Donor GRID
- B. date of birth;
- C. initials for name;
- D. initials for surname;
- E. sex at birth.

Step	User actions	EBMT Registry
1	In the Donor page click on the three dots button to the right from the Donor short ID to call the Donor menu.	The donor menu will open.
		
2	Click on Edit donor details in the Donor menu.	<p>The <i>Edit donor</i> window will appear.</p> <p>It is 2 steps form (it can be considerate as 2 pages or sections of the same form):</p> <ol style="list-style-type: none"> Donor information - includes data fields related to the general donor registration data (Donor ID, birthdate, initials, etc.). Reason - data field to inform about the reason for the change. <p>At the bottom of the form there are shown the following buttons:</p> <p>Cancel - to discard the changes. Use this button to close the Edit donor window without saving any changes done.</p> <p>Next - use this button to proceed to the next step (page) of the form. The button is active only if data editor edited any field of the form.</p>

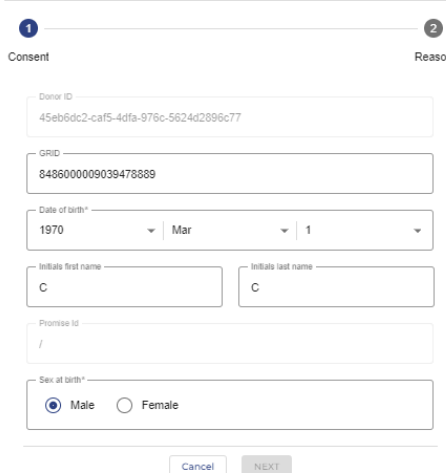
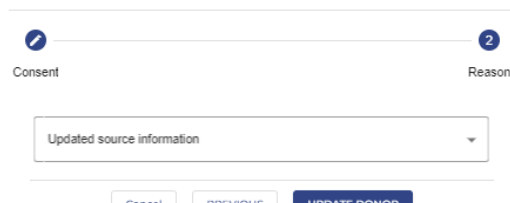
Step	User actions	EBMT Registry
		<p>Edit donor</p> 
3	<p>Edit required fields. Click the <i>Next</i> button to move to the next step.</p>	<p>The <i>Edit patient</i> window: reason for changes will be shown. There are shown the following buttons at the bottom of the window:</p> <p>Cancel - to discard the changes. Use this button to close the Update this patient window without saving any changes done. Previous - to go back to editing patient information. Update patient- to save changes and close Edit patient window.</p>
		<p>Edit donor</p> 
4	<p>Enter the reason for the changes:</p> <ul style="list-style-type: none"> Updated source information Data entry error/mistake <p>Click the <i>Update donor</i> button.</p>	<p>The <i>Edit donor</i> window disappears. Donor page is displayed at the main screen.</p>

Table 45, editing donor details in the EBMT Registry

Note: The Edit donor window also shows the EBMT Donor ID if it is required to see this information through the user interface. This field is not editable but for information purposes only.

Edit donor

Donor ID

2fd0b488-72a7-49e4-b971-ad95b7182fc7

Date of birth*

1980

▼

May

▼

7

▼

Initials first name

te

Initials last name

st

Promise Id

/

Sex at birth*

☐ Male




☒ Female

Cancel

UPDATE DONOR

Edit Donor ID number

Data editors can update the Donor ID, if needed. Follow the instructions below to update or edit the Donor ID.

Step	User actions	EBMT Registry
1	In the Donor page click on the three dots button to the right from the Donor short ID to call the Donor menu.	The Donor menu will open.
		
2	Click on Manage centres in the Donor menu.	<p>The <i>Centres linked to donor</i> window will appear.</p> <p>There are listed centres linked to this donor and Donor ID per centre.</p> <p>The Donor ID field is shown as disabled (greyed out). Next to the Donor ID field there are shown edit icon  and delete icon .</p> <p>Note: data editors cannot delete the Donor ID or the link between the centre and the donor. Should data editor click this button, the system will show an error.</p> <p>The <i>Centres linked to donor</i> window also contains administrator-related fields to link a new centre to the donor. For data editors it is not possible to link new centres, thus such fields should not be used.</p> <p>At the bottom of the form there are shown the following buttons:</p> <p>Cancel - to discard the changes. Use this button to close the <i>Centres linked to donor</i> window.</p> <p>+Link centre - data editors are not able to link new centres to a donor, thus clicking this button will cause system showing an error to data editors.</p>

Step	User actions	EBMT Registry
		<p>Centres linked to donor</p> <p>Registration centre* 9000 - demo centre 9000 Donor number* 2222222</p> <p>Link new centre to donor</p> <p>Centre* Donor number*</p> <p>Cancel + LINK CENTRE</p>
3	Click the edit icon next to the Donor ID in the <i>Centres linked to donor</i> window.	<p>The Donor ID field is shown in edit mode, there are icons to confirm and save changes ✓ or to cancel and close the field without saving any changes ✕.</p>
		<p>Centres linked to donor</p> <p>Registration centre* 9000 - demo centre 9000 Donor number* 2222222 ✓ ✕</p>
4	Edit the Donor ID as required and click confirm icon ✓	<p>The updated Donor ID is saved in the Donor ID field. The field is shown as disabled.</p>
		<p>Centres linked to donor</p> <p>Registration centre* 9000 - demo centre 9000 Donor number* 2222220 ✎ 🗑</p>
5	Click <i>Cancel</i> button at the bottom of the <i>Centres linked to donor</i> window.	<p>The <i>Centres linked to donor</i> window disappears. The Donor page is updated. New Donor ID is shown in the Donor summary.</p>

Table 46, editing donor ID number in the EBMT Registry

Edit Donor GRID

Please follow the [Edit Donor details](#) process to update or add Donor GRID.

Edit Donor consent

The process below explains how to update or edit the Donor informed consent related data.

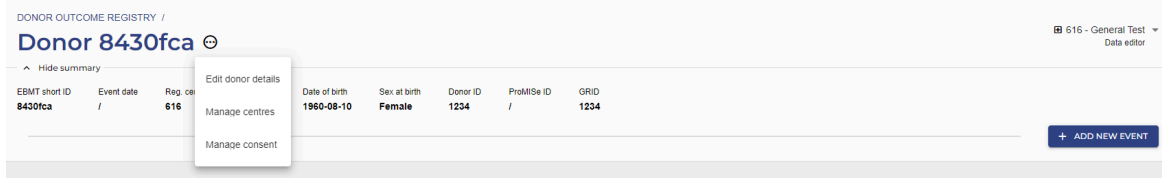
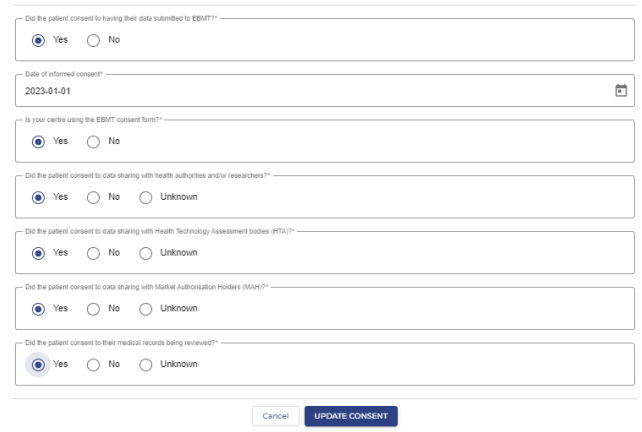
Step	User actions	EBMT Registry
1	In the Donor page click on the three dots button to the right from the Donor short ID to call the Donor menu.	The Donor menu will open.
		
2	Click on Manage consent in the Donor menu.	<p>The Manage donor consent window will appear. There are shown the following buttons at the bottom of the window:</p> <p>Update consent- to apply and save the changes in shown data fields.</p> <p>Cancel - to discard the changes. Use this button to close the Manage patient consent window without saving any changes done.</p>
		
3	Edit required fields. Click the Update consent button to apply the changes.	<p>The donor consent-related data is updated.</p> <p>The Manage donor consent window disappears.</p> <p>Donor page is displayed at the main screen.</p>

Table 47, editing donor consent in the EBMT Registry

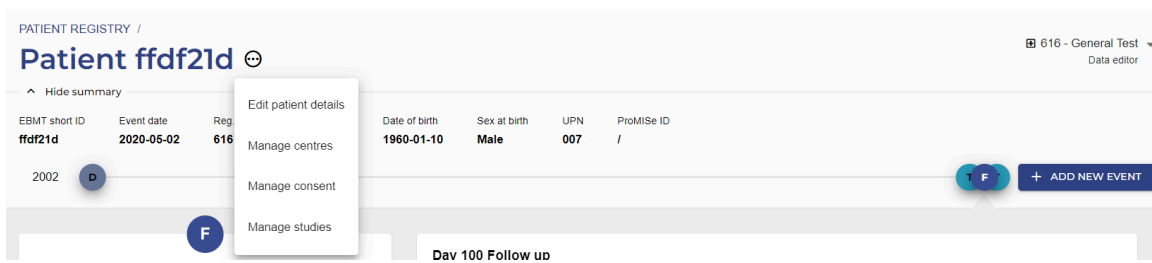
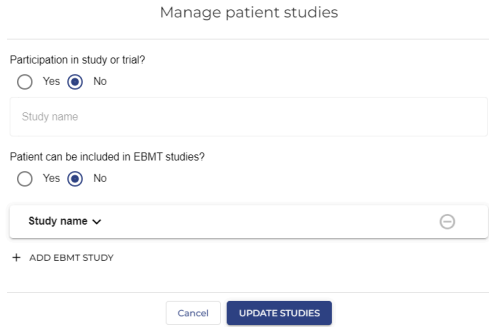
Edit Patient studies

Follow the instructions below to edit patient data related to non EBMT studies, in particular:

- Edit information as to whether the patient is participating in any non-EBMT study or trial and if answered Yes, to add study name;
- Indicate whether the patient can be included into the EBMT studies.

Information on patient enrolment into EBMT studies is managed by EBMT staff and shall not be added or edited by users from Centres or National registries.

EBMT staff will add every EBMT study related information (E.g. *Working group; Study name; Study number; Study type; Patient ID number*).

Step	User actions	EBMT Registry
1	In the Patient page click on the three dots button to the right from the Patient short ID to call the Patient menu.	The Patient menu will open.
		
2	Select Manage studies from the patient menu.	<p>The Manage patient studies window will appear.</p> <p>There are shown the following buttons at the bottom of the window:</p> <p>Update studies - to apply and save the changes in shown data fields.</p> <p>Cancel - to discard the changes. Use this button to close the Manage patient consent window without saving any changes done.</p>
		

Step	User actions	EBMT Registry
3	Edit required fields. Click the <i>Update studies</i> button to apply the changes.	The patient study-related data is updated. The <i>Manage patient studies</i> window disappears. Patient page is displayed at the main screen.

Table 48, editing patient studies in the EBMT Registry

Delete Patient/Donor

Only the Administrator can delete a patient in exceptional circumstances.

Data viewers and data editors cannot delete any patient or donor.

Add new event

Follow the instructions below to add a new patient or donor [event](#).

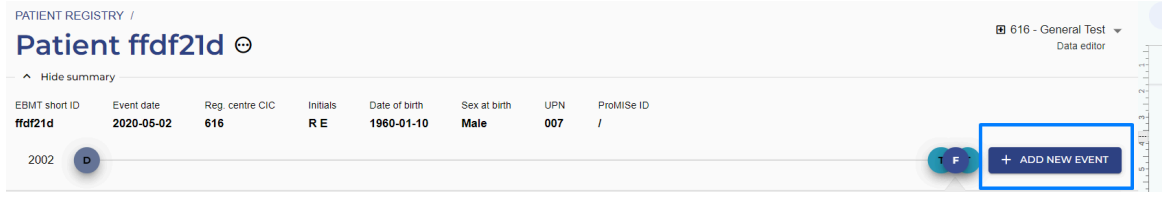
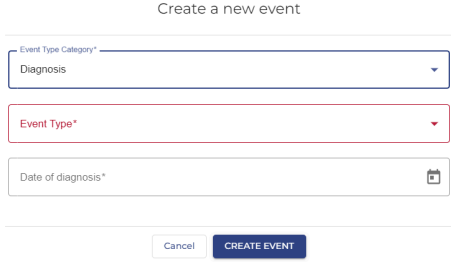
Step	User actions	EBMT Registry
1	In the <i>Patient page (or Donor page)</i> click the Add new event button located on the right from the patient timeline.	The Create a new event window will appear.
		
2	<p>Fill in the Create a new event form, specifying:</p> <ul style="list-style-type: none"> a. Event type category: <i>Diagnosis/Treatment/Follow Up/Other</i>; (this field is not shown for Donor events) b. Event type (name of the data collection form for the event you want to register); c. Event date. 	
3	Once fields are filled in correctly, click the Create event button.	The event is created in the Patient/Donor page, event form is shown in the main screen.

Table 49, adding new patient or donor event

Edit event

Follow the instructions below to edit any registered patient or donor [event](#).

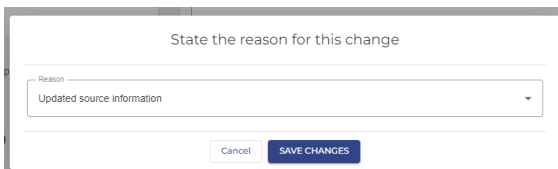
Step	User actions	EBMT Registry
1	<p>In the <i>Patient page (or Donor page)</i> open the event form you wish to edit (add new data or edit data, etc.).</p> <p>Make edits in the required data fields.</p> <p>Click Save changes button in the Event summary.</p>	<p>The warning message asking for confirmation and to state the reason for this change.</p> <p>It is possible to indicate the following reasons:</p> <ul style="list-style-type: none"> • Updates source information; • Data entry err/mistake. <p>The window also contains the buttons:</p> <p><i>Cancel</i> - to cancel the request to save introduced changes. Use this button to cancel saving the changes to the database.</p> <p><i>Save changes</i> - use this button to confirm saving changes to EBMT Registry database.</p>
		
2	<p>Indicate the reason for introduced changes from the dropdown list and click <i>Save changes</i> button</p>	<p>The changes are saved to the EBMT Registry database. The new version of the event form is created and recorded in the Audit log.</p> <p>The event form with introduced changes is displayed in the main screen.</p>

Table 50, editing patient and donor event in the EBMT Registry

Delete event

Follow the instructions below to remove the patient's or donor's [event](#) from the timeline.

The event is not deleted from the system in full. Data from the event is removed from the database, but it remains in the [Audit trail](#), that is why in the user interface this action is called Archive event.


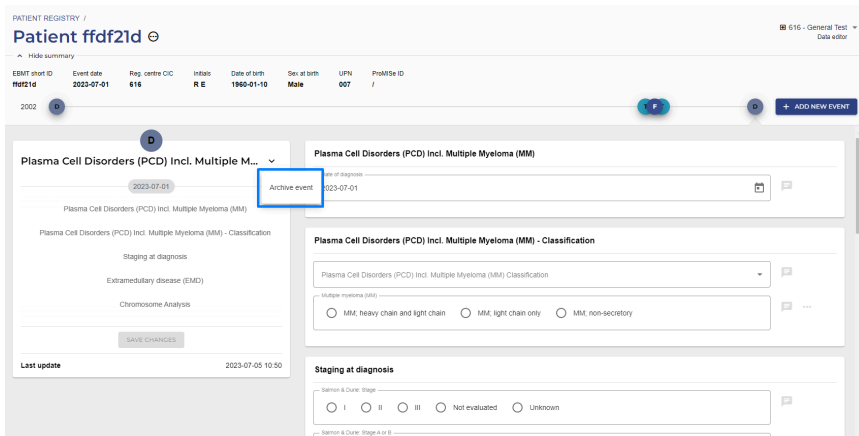
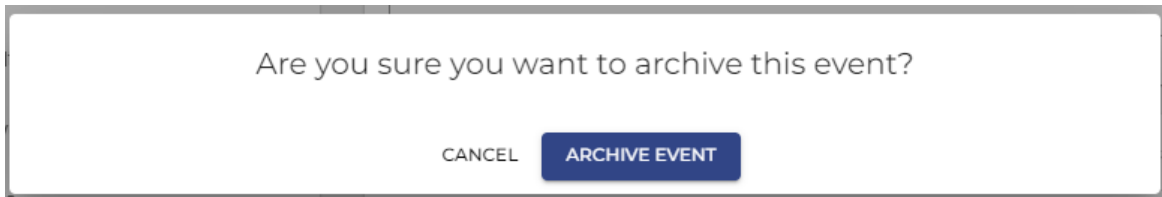
Step	User actions	EBMT Registry
1	<p>In the <i>Patient page (or Donor page)</i> open the event you wish to delete.</p> <p>Click the icon  to the right from the event form name to call the event menu.</p>	<p>The event menu will appear.</p>
		
2	<p>Click <i>Archive event</i>. The warning message asking to confirm the action will be shown. It includes the following buttons:</p> <p><i>Archive event</i> button - to remove the event from the Patient/Donor page and event data from the database.</p> <p><i>Cancel</i> - to cancel this request and leave the event in the Patient/Donor page and event data in the database.</p>	
3	<p>Click <i>Archive event</i> button.</p>	<p>The event disappears from the Patient/Donor timeline. The event with the latest date is loaded and shown in the main screen.</p>

Table 51, instructions on how to delete (archive) an event

Add anonymous event

The process below explains how to add an [anonymous event](#) to register minimum essential data on treatment of non-consenting patients in the user [Context](#).

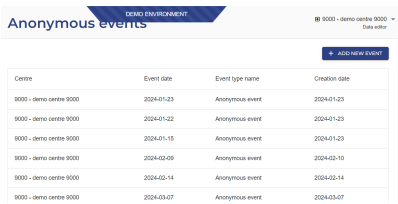
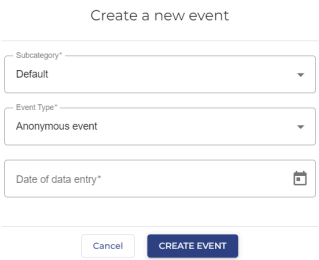
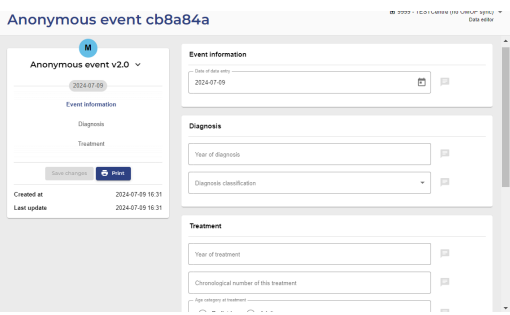
Step	User actions	EBMT Registry
1	Click <i>Anonymous events</i> in the Navigation menu .	Anonymous events overview page opens.
		
2	Click <i>Add new event</i> button.	<p>The <i>Create a new event</i> window will appear. It contains:</p> <p>Date field - to enter the date of the treatment</p> <p>Cancel button - to cancel anonymous event creation and go back to Anonymous events overview page.</p> <p>Create event button - to create an anonymous event in the system</p>
		
3	Fill in the date of the anonymous event and click the <i>Create event</i> button.	New anonymous event with a unique number is created in the system and is loaded on the screen.
		
	Fill-in the data in the data fields and click the <i>Save changes</i> button.	The data is saved for the anonymous event in the database.

Table 52, instructions on how to add anonymous events

Edit anonymous event

Follow the instructions below to edit any registered [anonymous event](#).

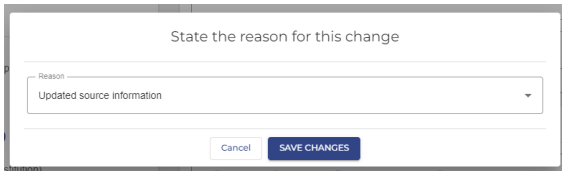
Step	User actions	EBMT Registry
1	<p>In the Anonymous events overview page open the event form you wish to edit.</p> <p>Make edits in the required data fields.</p> <p>Click <i>Save changes</i> button in the Event summary.</p>	<p>The warning message asking for confirmation and to state the reason for this change.</p> <p>The window also contains the buttons:</p> <p><i>Cancel</i> - to cancel the request to save introduced changes. Use this button to cancel saving the changes to the database.</p> <p><i>Save changes</i> - use this button to confirm saving changes to EBMT Registry database.</p>
		
2	<p>Indicate the reason for introduced changes from the dropdown list. It is possible to indicate the following reasons:</p> <ul style="list-style-type: none"> • Updates source information; • Data entry err/mistake. <p>Click <i>Save changes</i> button.</p>	<p>The changes are saved to the EBMT Registry database. The new version of the event form is created and recorded in the Audit log.</p> <p>The anonymous event form with introduced changes is displayed in the main screen.</p>

Table 53, instructions on how to edit anonymous events

Delete anonymous event

Follow the instructions below to remove any anonymous event from the system.

The anonymous event is not deleted from the system in full. Data from the event is removed from the database, but it remains in the [Audit trail](#), that is why in the user interface this action is called Archive event.


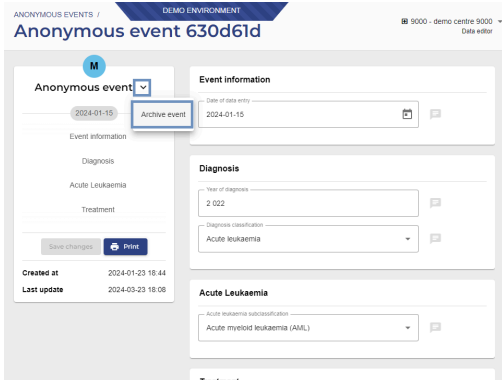
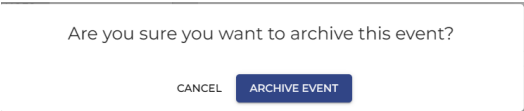
Step	User actions	EBMT Registry
1	<p>Open the page of the Anonymous event page you wish to delete.</p> <p>Click the icon  to the right from the event form name to call the event menu.</p>	<p>The event menu will appear.</p>
		
2	<p>Click Archive event.</p>	<p>The warning message asking to confirm the action will be shown.</p> <p>It includes the following buttons: <i>Archive event</i> button - to remove the Anonymous event from the system. <i>Cancel</i> - to cancel this request and leave the event in the database.</p>
		
3	<p>Click <i>Archive event</i> button.</p>	<p>The Anonymous event disappears from the system. Anonymous events overview page is shown on the main screen with the updated list.</p>

Table 54, instructions on how to delete anonymous events

Abbreviations

Abbreviation	Full term
EBMT	European Society for Blood and Marrow Transplantation
Allo-HCT	Allogeneic HCT
Auto-HCT	Autologous HCT
CT	Cellular therapy
IST	Immunosuppressive therapy
MFA	Multi-factor authentication
OMOP CDM	Observational Medical Outcomes Partnership Common Data Model
DCF	Data collection form
VR	Virtual registry
UPN	Unique patient number (see Patient)

Table 55, abbreviations