STOP SMOKING TREATMENT for ONTARIO PATIENTS

STOP Program Online Portal

Training Manual

Centre for Addiction and Mental Health
Centre de toxicomanie et de santé mentale

SMOKE FREE ONTARIO

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Introduction

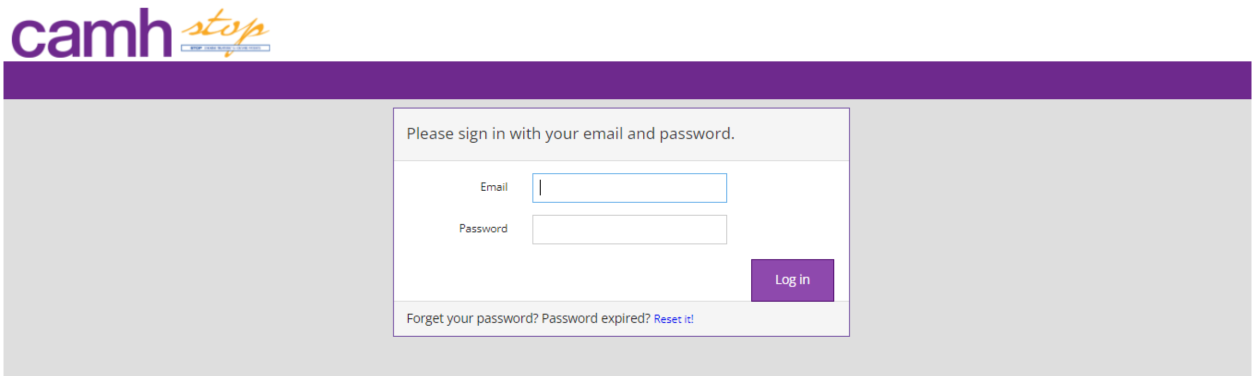
The **STOP (Smoking Treatment for Ontario Patients) Program** provides evidence-based treatment interventions including cost-free Nicotine Replacement Therapy to Ontarians who smoke commercial cigarettes and/or use other tobacco/nicotine products (e.g., e-cigarettes, cigars, chewing tobacco, water pipe, etc.) and wish to quit. STOP operates within the Centre for Addiction and Mental Health (CAMH) and is funded by the Government of Ontario.

This manual provides instructions on how to use the online STOP Portal for relevant patient interactions and medication management. This manual is supplementary to the STOP Operations Manual.

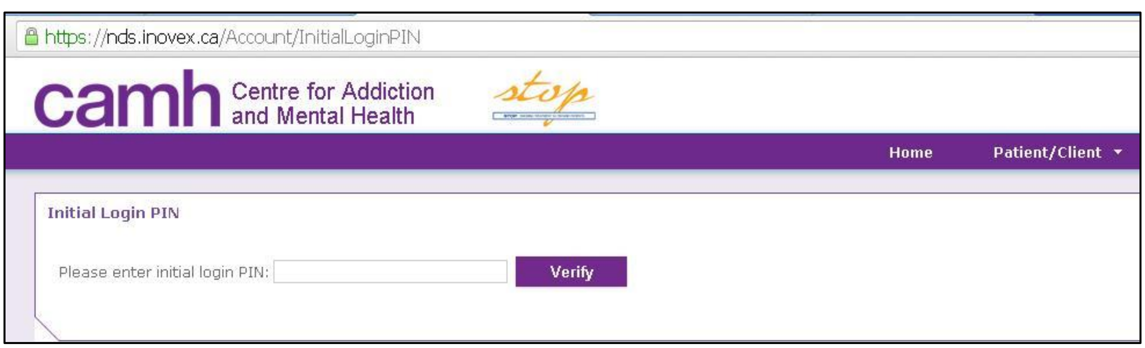
Login and Password

1.1 For your first time logging into the STOP Portal, you will receive an email from STOP with the subject line "Welcome to the STOP Portal." The email will contain a URL link and your temporary password.

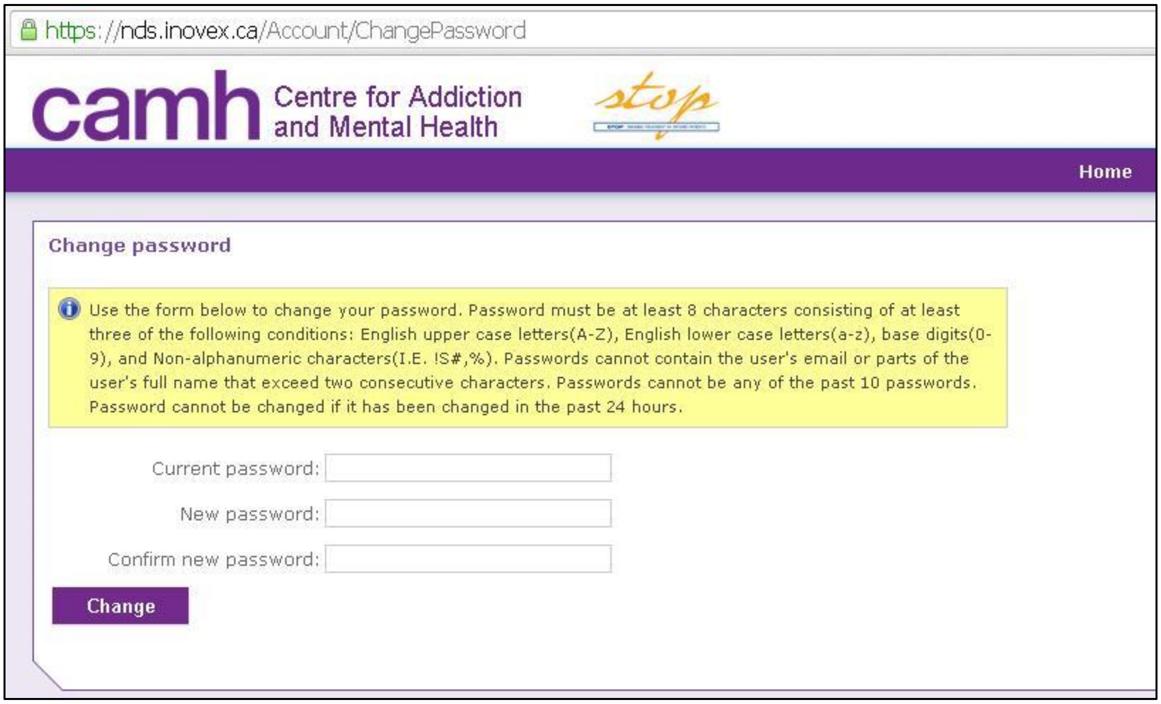
1.2 After clicking the link, please enter the email address to which your login information was sent, and the temporary password contained in the email (we recommend **copying** the password into the appropriate field).



1.3 You will be prompted to enter an Initial Login PIN. This PIN will be sent to you in a separate email from a member of the STOP team. This will only be needed when logging in for the first time. It will not be needed for any subsequent log-ins.

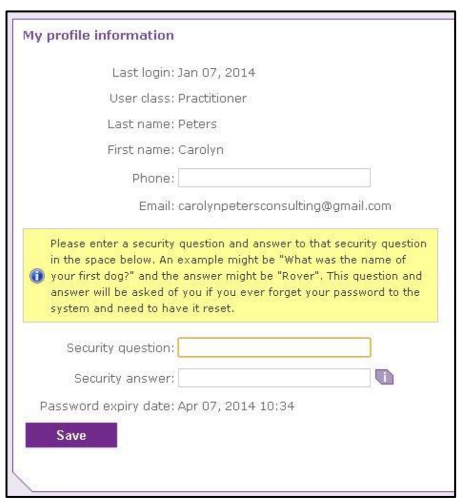


1.4 You will then be required to change your password. Be sure to read the condition requirements for your new password in the yellow box. Your "Current password" is the temporary one sent to you in the Welcome email.



1.5 Your profile information will then appear, and you will be prompted to create a security question. Be sure to read the condition requirements for your security question in the yellow box.

1.6 After clicking "Save," a drop-down menu may pop up asking which clinic you are trying to access. Please select your current clinic. This feature is relevant for practitioners who work at more than one organization and/or site.

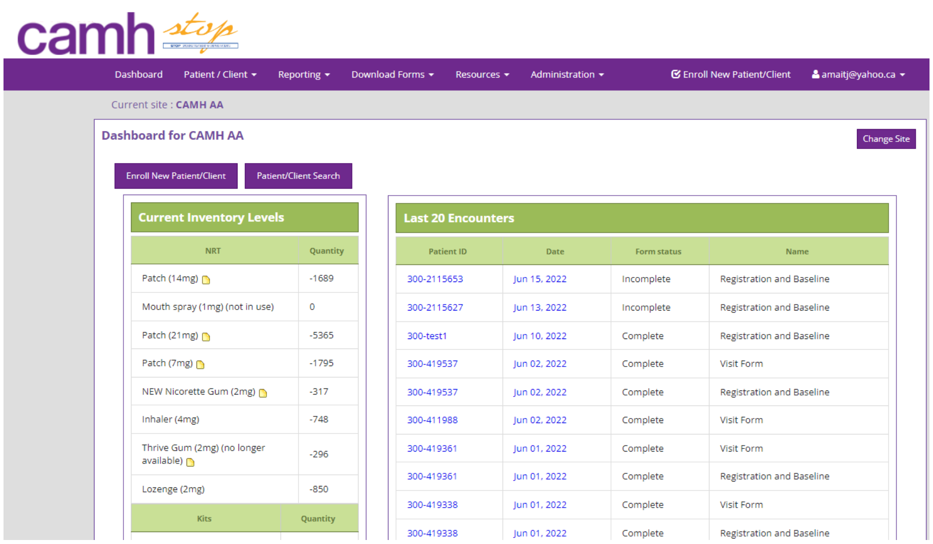


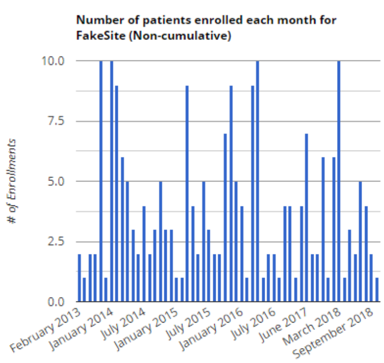
Note: if an account needs to be deactivated (e.g., staff turnover), please contact your STOP coordinator via email as soon as possible.

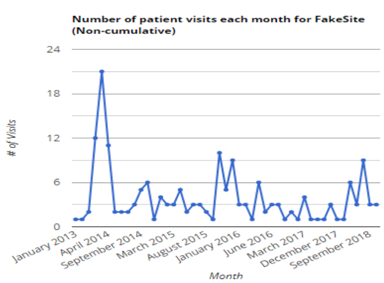
Home Screen/Dashboard

On the Home Screen, the following features are available:

- "Enroll New Patient/Client" quick access button
- "Patient/Client Search" quick access button
- Ability to "Change Site" (relevant for practitioners who work at more than one organization and/or site)
- Current Inventory Levels
- Last 100 Encounters with patients at your organization, along with date, the status of the form, and the reason for the encounter
- Graphs with monthly enrollments and # of visits by month for your organization





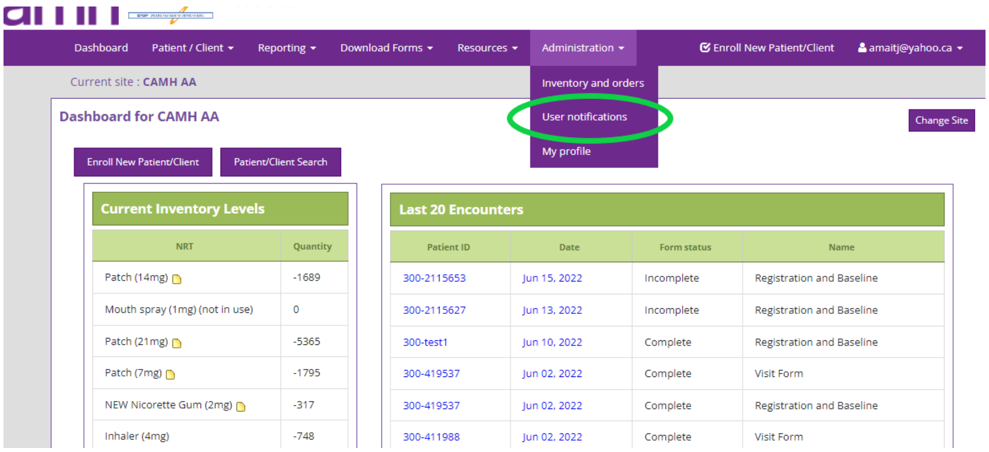


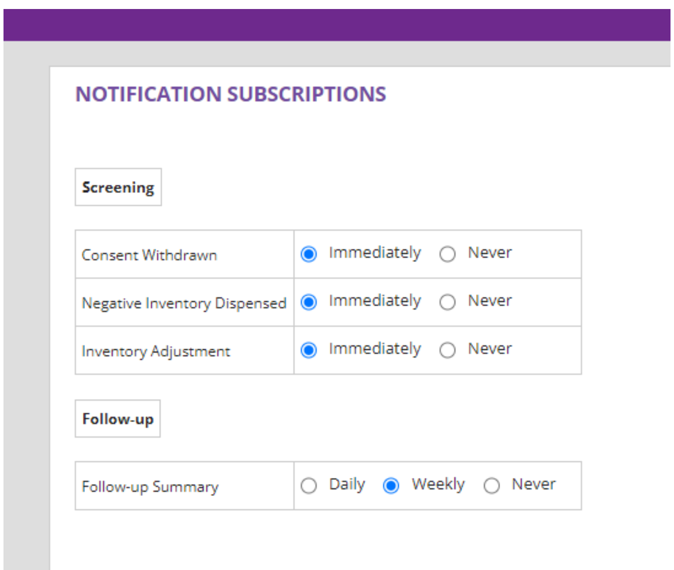
User notifications

You can choose to receive notifications when:

- A patient at the site(s) you have access to withdraws from the program
- Your site(s) has a negative NRT inventory balance
- Your site performs an NRT inventory adjustment
- A patient you enrolled online is due for a follow-up

You can turn these on or off by going to administration → user notifications



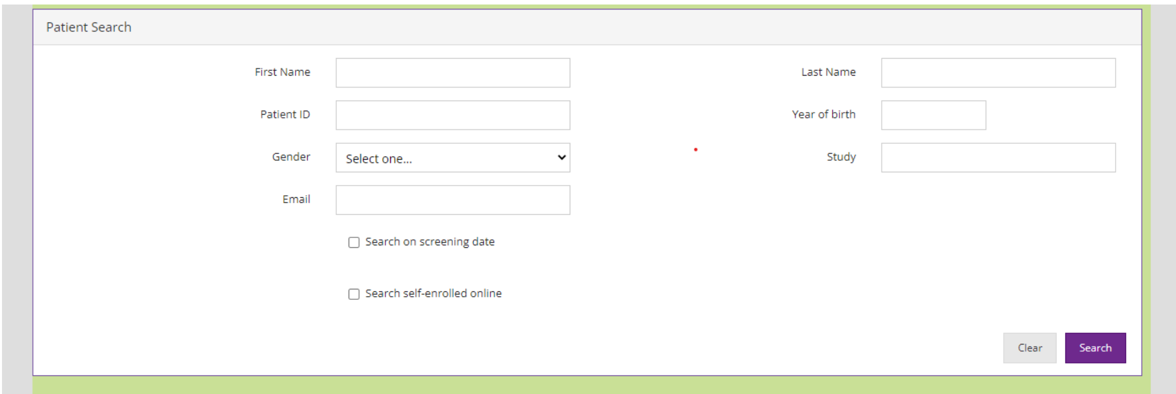


You CANNOT turn off Locked or Deceased notifications, or password reset reminders (these occur for 2 weeks prior to your password change date)

- If you are unable to receive these notifications, please speak to your IT department

Searching for an Existing Patient

- From the Home Screen, click on “Patient/Client Search” (or from Patient/Client drop-down menu, select “Patient/Client Search”).
- Patients can be searched by any of the following variables (you can also perform compound searches): First Name, Last Name, Patient ID, Year of Birth, email address and Enrollment Date. Partial information may also be searched (e.g., first initial, first few letters of last name).



Enrolling a New Patient

NOTE: The STOP Portal will time out after a certain period of inactivity. Please remember to save if you step away from your computer while in the middle of completing a survey.

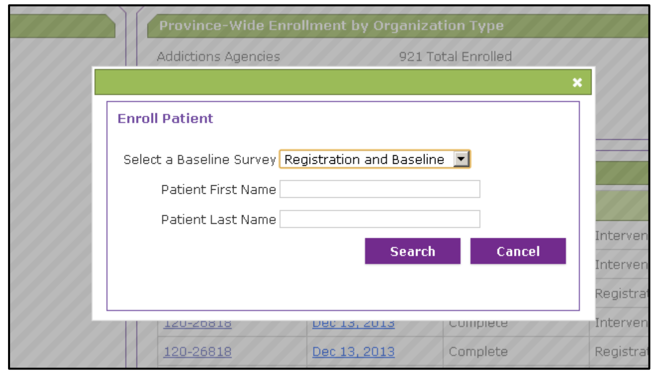
STOP Patients can enroll in the Program in two ways:

1. **Practitioner-assisted enrollment:** Patients can enroll with their STOP Practitioner during their initial clinic visit (either on paper or using the online Portal)
2. **Online via My STOP Portal** by self-completing the consent and baseline questionnaires (using a computer/tablet/smartphone or any device with internet access) ahead of their practitioner appointment (where their responses will be reviewed)

1) Practitioner-assisted enrollment

Name and Enrollment Date

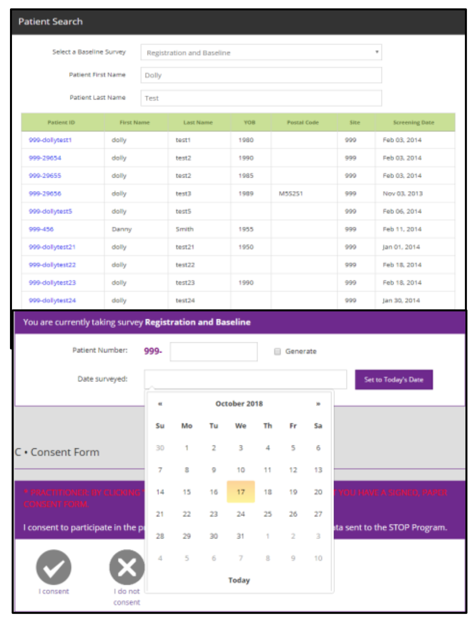
a. On the Home Screen, click on/select "Enroll New Patient/Client". A new pop-up (or page) will open.



b. Select "Registration and Baseline," and enter the patient's First and Last Name in the respective fields.

c. The STOP Portal will search to make sure that this patient is not already enrolled in the STOP Program at your site.

d. If the search results in "No records found", select "New Patient". In the event a patient with the same name appears, but the Year of Birth (YOB) and Postal Code do not match, select "New Patient".



e. If the patient has already enrolled and appears in the system, click on their Patient ID to review their Patient Profile. If you want to dispense NRT AND their consent is still valid AND they have not exhausted the maximum 26 weeks of NRT allowance, proceed with an Intervention Form instead (see page 17). **If their consent has expired, see page 19 to re-enroll this patient.**

f. After selecting "New Patient," the Registration and Baseline Survey will be opened. A pop-up will prompt you to enter the survey date (***the date that the patient enrolled, which should match the date the patient and the practitioner conducted the informed consent procedure***).

g. If enrolling a patient on today's date, select the "Set to Today's Date" button. If not, use the calendar tool to select the date that the patient actually enrolled and consented to participate in the STOP Program. ***In this case, you will need to answer "I consent" to the initial consent question first*** (see 3.8 below).

Consent Form and Contact Information

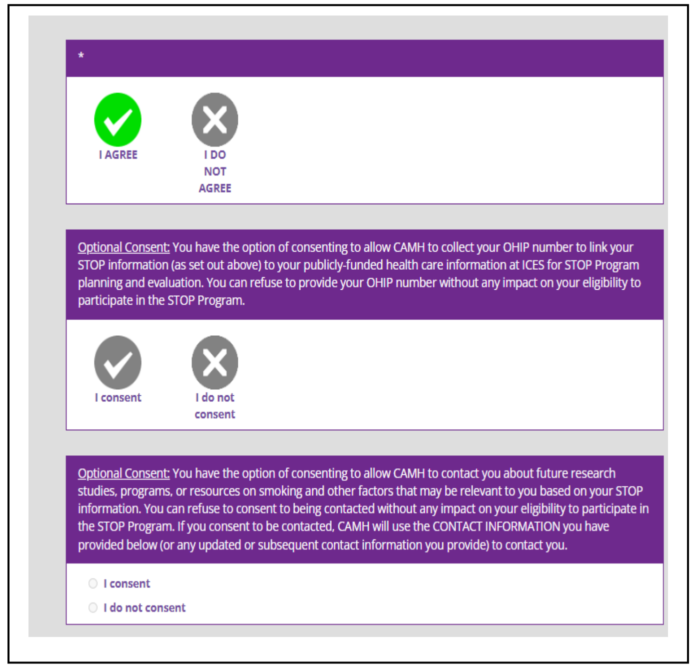
a. <u>Consent procedure must be completed</u> ***as per the instructions in the STOP Operations Manual*** before proceeding to complete the Registration and Baseline Questionnaires. The following instructions are specific to entering the information <u>into the STOP Portal</u>.

NOTE: Fields marked with a * are required

b. Choose the patient's preferred language – English or French. If the preferred language is French, select "French" from the Survey Language drop-down menu at the top right of the page.

c. At the top of the screen, enter the patient's Patient ID number based on your organization's procedure for assigning a <u>unique identifier</u> to each patient.

d. *Reminder:* The Patient ID # must be unique and independent from OHIP number or any other Personal Health Information. If you are unsure of the numbering system for your site, please contact a STOP Coordinator for assistance. The Portal also provides the ability to automatically generate a Patient ID. To generate a unique Patient ID through the Portal, check the Generate box beside the Patient ID field.



Select a **√**("I agree") or **X**("I do not agree") for the first Consent question. *Please note that you will* ***not*** *be able to enroll a patient in the STOP Portal if they have not consented to participate!* ***Therefore, you <u>must</u> select "I Consent" in order to proceed. If you click "I do not consent" by mistake, please click "Cancel" in the pop-up warning window.***

Continue entering all of the information from the patient's Consent Form, including Name and Contact Information.

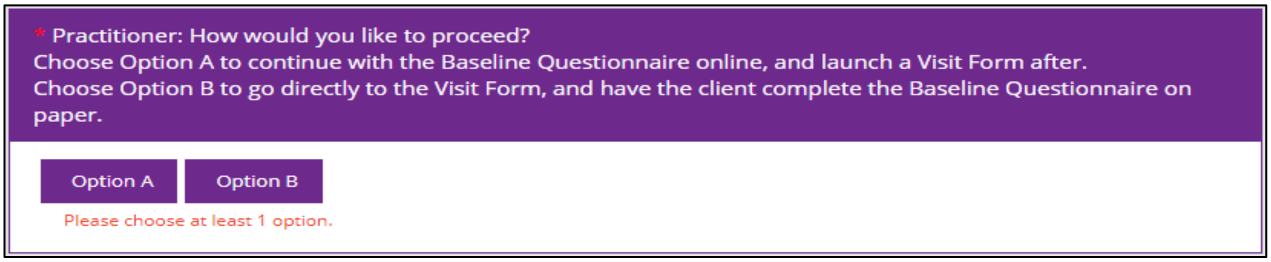
Registration Information

This part of the survey asks for further patient information (Date of Birth, Gender, Height, and Weight), as well as questions related to their nicotine use.

NOTE: Questionnaires are dynamic. New questions may appear depending on the responses of the previous questions (built-in skip logic).

a. Read all text in blue to the patient, and complete all questions on the screen. A response for every question on this page is <u>required</u>.

b. If entering paper forms into the STOP Portal after the patient has left your office, please choose “answer omitted” for questions that were left unanswered.
c. Please note that new questions may appear depending on the responses of the previous questions (built-in skip logic).
d. At end of the form, select either **Option A** or **Option B**.


* Practitioner: How would you like to proceed?
Choose Option A to continue with the Baseline Questionnaire online, and launch a Visit Form after.
Choose Option B to go directly to the Visit Form, and have the client complete the Baseline Questionnaire on paper.

Option A | Option B

Please choose at least 1 option.

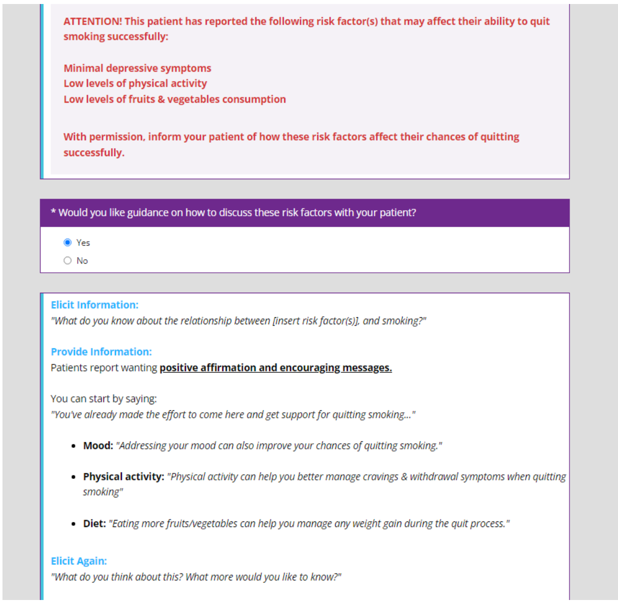
Option A → Continue with the Baseline Questionnaire online and launch an Intervention/Visit Form after
Option B → Go directly to the Intervention/Visit Form and have the patient complete the Baseline Questionnaire on paper (it will need to be mailed to STOP for delayed entry)

*Please note that if option B is chosen, STOP Practitioners will **not** have the ability to go back and enter the Baseline Questionnaire on the Portal once the patient has completed the paper form. The Baseline Questionnaire will need to be sent to STOP for data entry. Therefore, **<u>we strongly recommend that Option A be used</u>**, as it ensures that the Baseline Questionnaire is entered directly into the Portal. As a result, there will be no data entry delay at STOP, and you will have the most complete and up-to-date information for each patient. Additionally, the online Portal has built-in skip logics and prompts that facilitate the completion of the Baseline questionnaire.*

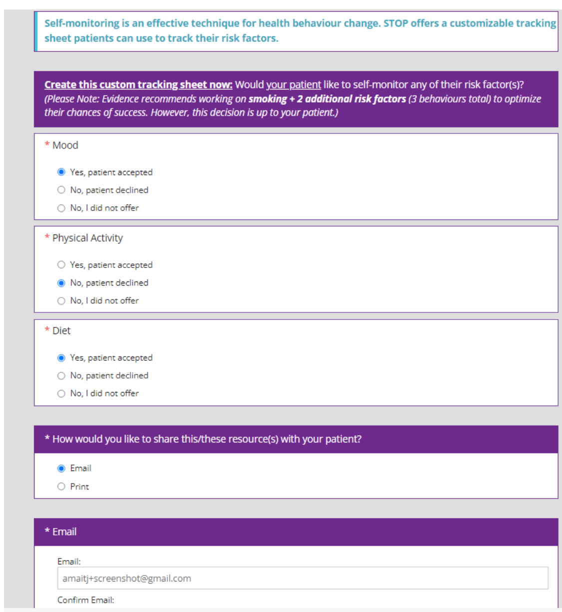
Baseline Questionnaire

<u>Option A:</u> *Baseline Questionnaire to be completed online*

- Complete with the patient the Other Substances (OS) section.
- If required, complete with the patient the AUDIT-10 (A10) section.
- Complete with the patient the General Health (GH) section.
- Complete with the patient the Demographics (D) section.
- Complete with the patient the Background (B) section.
- If applicable, follow the instructions on the Resources (RES) section. You will be asked if you would like guidance on how to discuss reported risk factors with the patient.



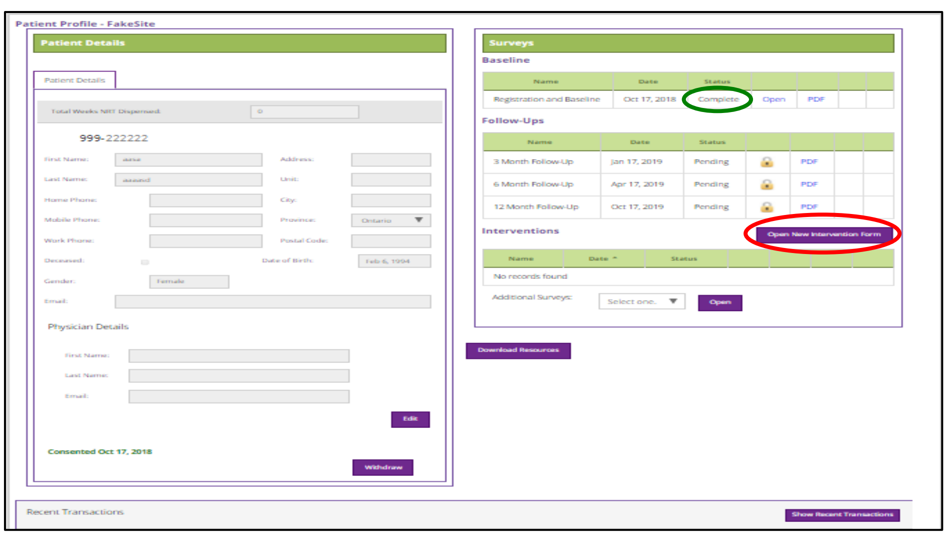
- You can choose to provide the patient with a tracking sheet for self-monitoring their risk factors. Educational resources for risk factors are also available for download off the portal and housed on the CAMH website. These can be shared via email.
- Email: Email field will auto-populate with the patient's email address; email will contain URLs to selected resources on the CAMH website.



- In the End section, enter any additional Comments or Follow-Up notes, if applicable.
- Click “Finish” to complete the Baseline Questionnaire.
- Please note that the patient may choose not to answer a question, but we ask that they do their best to answer all questions. If the patient is unable to provide a response, select “Don’t know/prefer not to answer”. If entering paper forms into the STOP Portal after the patient has left your office, please choose “answer omitted” for questions that were left unanswered.

*At any point, the Registration and Baseline Questionnaire can be printed by clicking on “**Print**” at the top right of the page. If you wish to save this information to the patient’s EMR, you can also download and save the survey as a PDF file by clicking the “**Download PDF**” button. All responses entered will be included in the Print/PDF. These options are also available from the Patient Profile.*

The **Patient Profile** will now appear on your screen. The Registration and Baseline status should now be Complete. If you are dispensing NRT to this patient, an Intervention (Visit) Form needs to be completed. Click on “Open New Intervention Form” to proceed.



If you select **Option B** at the end of the Registration tab: *The Intervention (Visit) Form will open immediately. The Baseline Questionnaire will need to be sent to STOP once the patient has filled out the paper copy. You will **not** have the ability to enter the responses* *from the Baseline Questionnaire once this option is selected.* ***Please note that any paper forms sent to STOP may not be immediately entered into the STOP Portal.***

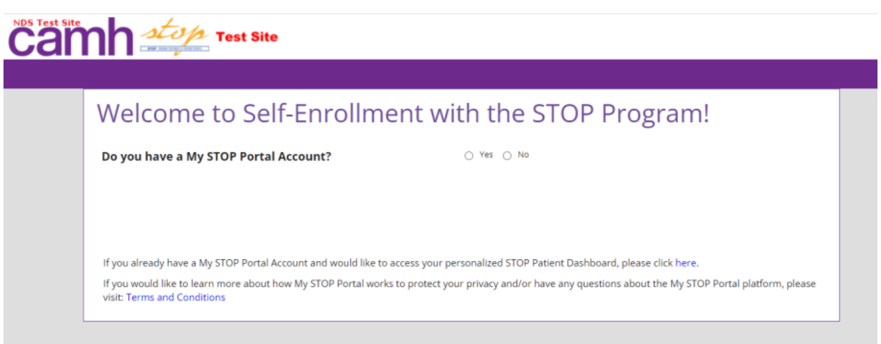
Self-Enrollment via My STOP Portal

People interested in joining the STOP Program have the option to self-enroll by completing the consent, registration and baseline forms online ahead of their scheduled appointment. This information will be reviewed at the time of their first STOP appointment with a STOP Practitioner.

1. If a patient is interested in self-enrolling into the STOP Program, their practitioner can provide them with the link to the My STOP Portal self-enrollment page (www.joinstopprogram.ca).

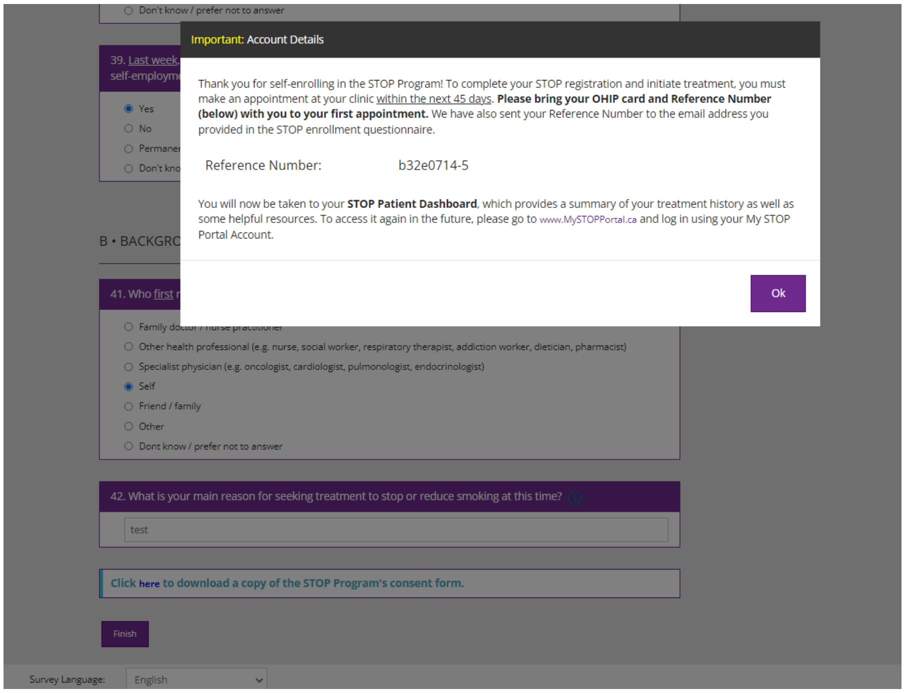
2. After navigating to the My STOP Portal self-enrollment page, patients will need to answer the initial question, “Do you have a My STOP Portal Account?”

3. If they are new to the STOP Program, or have never enrolled in the STOP Program and are not in a conflicting program, patients should answer “no”. They will be asked to create a My STOP Portal Account, after which they will be allowed to proceed to the consent, registration and baseline questions.
    - Patients who already have a My STOP Portal account (see below) because they have enrolled previously will need to answer “yes” and login to their account first before proceeding



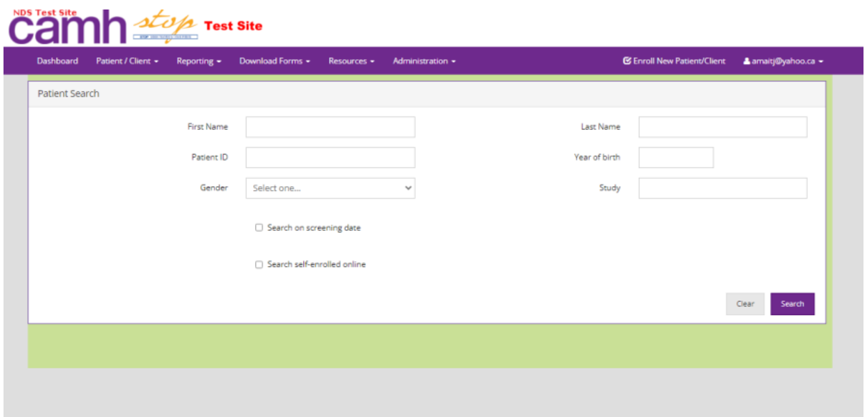
3. Patients will complete all consent questions, including their first and last name and their email address.
    - The patient’s email address will become their username to log into their STOP Portal account
4. The patient will complete all registration and baseline questions themselves.

5. Upon completion, patients will receive an email to the address provided during self-enrollment. This email will contain a reference number.
    - Patients will also be reminded to make an appointment to see their clinic within 45 days to complete their enrollment. They should **bring their reference number to the appointment**, though you can also search for them by their email address.

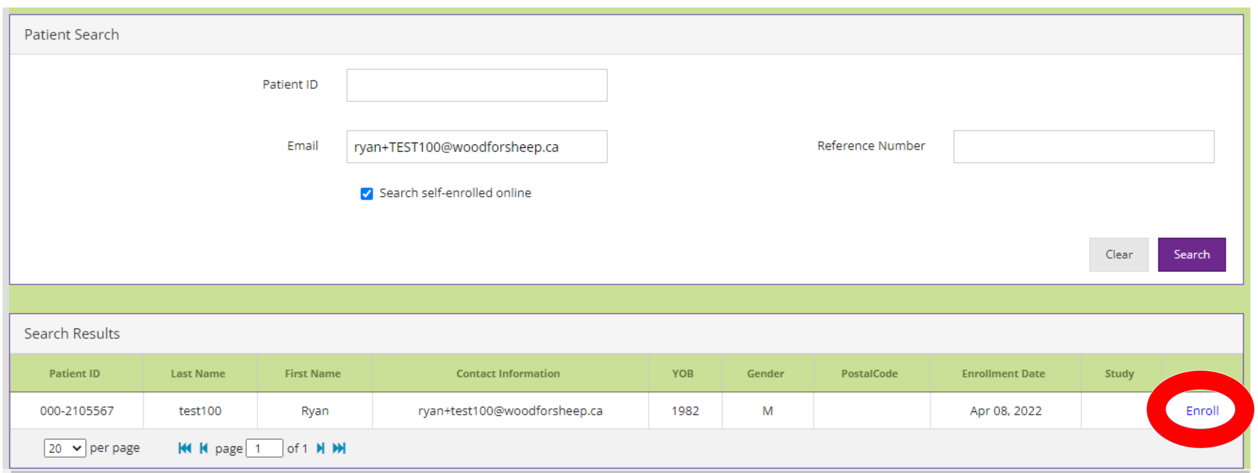


At the clinic appointment:

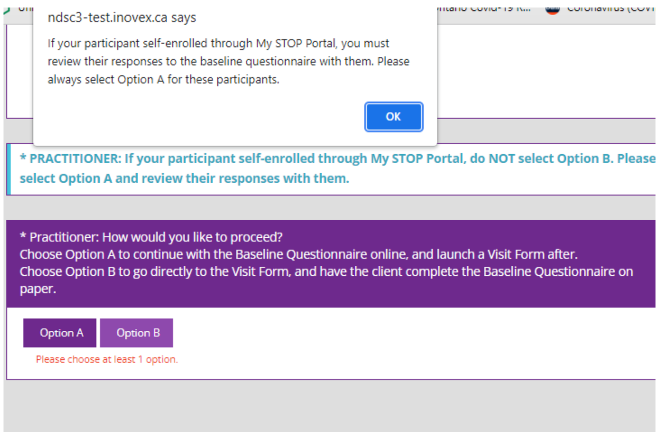
6. At the in-person appointment, the **practitioner** will need to search for the patient using their **email address** or the **reference number** provided to the patient during self-enrollment.
    - To find a self-enrolled patient, select “Patient/Client search” and check off the box ‘search self-enrolled online’. Enter the patient’s email address or reference number and click ‘search’.
    - **Note:** For privacy reasons, practitioners cannot search for patients who self-enrolled by anything other than their email or reference number. It is important that patients come to their appointment with this information.



7. Add the patient to your clinic by clicking the “enroll” link on the far right of the screen. The patient will be automatically enrolled into your clinic.



8. You will need to open the patient’s registration and baseline to review their responses and complete any unanswered questions (note: some questions were **not** visible to the patient and require the healthcare practitioner’s attention at this initial visit. Some questions are also time-sensitive and should only be asked during the in-person visit.). When the patient self-enrolls through My STOP Portal, the completion of their enrollment requires the practitioner to review the entire baseline. The Option B button (to skip directly to the visit form after the Registration questions are answered) is disabled in this scenario.



9. Click Finish to complete the enrollment.

10. A blank copy of the STOP Program consent form will be emailed to the patient for reference. Patients can access pdf versions of their completed consent and registration forms at any time by accessing their Patient Dashboard (see page 19)

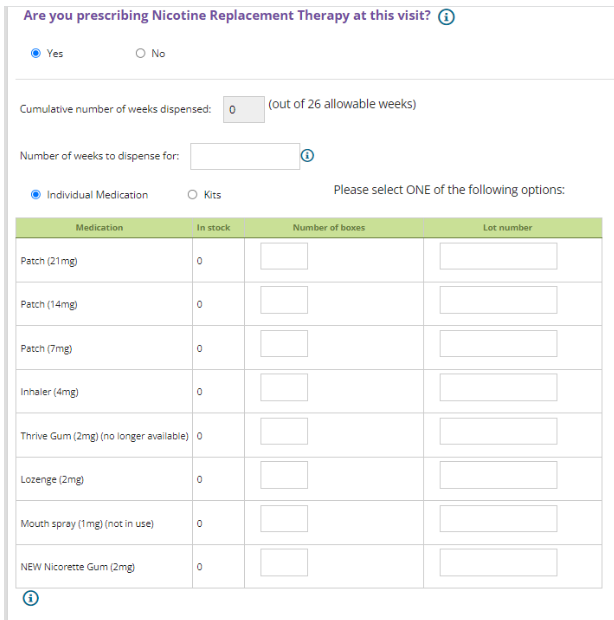
Intervention (Visit) Form

1. On the right side of the Patient Profile, select "Open New Intervention Form".

2. Check that the Date Surveyed is the date that the patient actually met with the practitioner for their visit. The default is set to today's date however, this may not be the same date that the Visit took place.

3. Ask the patient each question/answer the questions as required and enter your name (or the name of the practitioner who completed the visit).

4. Select "Yes" if you are prescribing NRT at this visit. A table will appear (see below) for you to input:
   a. The number of weeks you are dispensing for
   b. The NRT products being provided to the patient at this visit. You must include the Number of Boxes and the Lot Number and Expiry Date for each product.
   c. *Please make sure to follow the NRT Dispensing rules and guidelines outlined in the STOP Operations Manual.*
   d. Enter any comments, if applicable.



Are you prescribing Nicotine Replacement Therapy at this visit?

Yes No

Cumulative number of weeks dispensed: 0 (out of 26 allowable weeks)

Number of weeks to dispense for:

Individual Medication Kits

Please select ONE of the following options:

Medication	In stock	Number of boxes	Lot number
Patch (21mg)	0		
Patch (14mg)	0		
Patch (7mg)	0		
Inhaler (4mg)	0		
Thrive Gum (2mg) (no longer available)	0		
Lozenge (2mg)	0		
Mouth spray (1mg) (not in use)	0		
NEW Nicorette Gum (2mg)	0		

5. **Please note that you may not dispense more than 4 weeks of NRT products at a time.** In rare circumstances, if you need to dispense more than 4 weeks of individual NRT products at one time, you are required to indicate the reason as well as the name of the STOP Coordinator who approved the request in advance of the Visit.

6. Click on “Finish” to submit the Visit Form.

7. The NRT dispensed to the patient will automatically be subtracted from your inventory. The total number of weeks of NRT received by the patient will also automatically be updated and can always be found on the upper-left of the Patient Profile. Note: some types of short-acting NRT are no longer available.

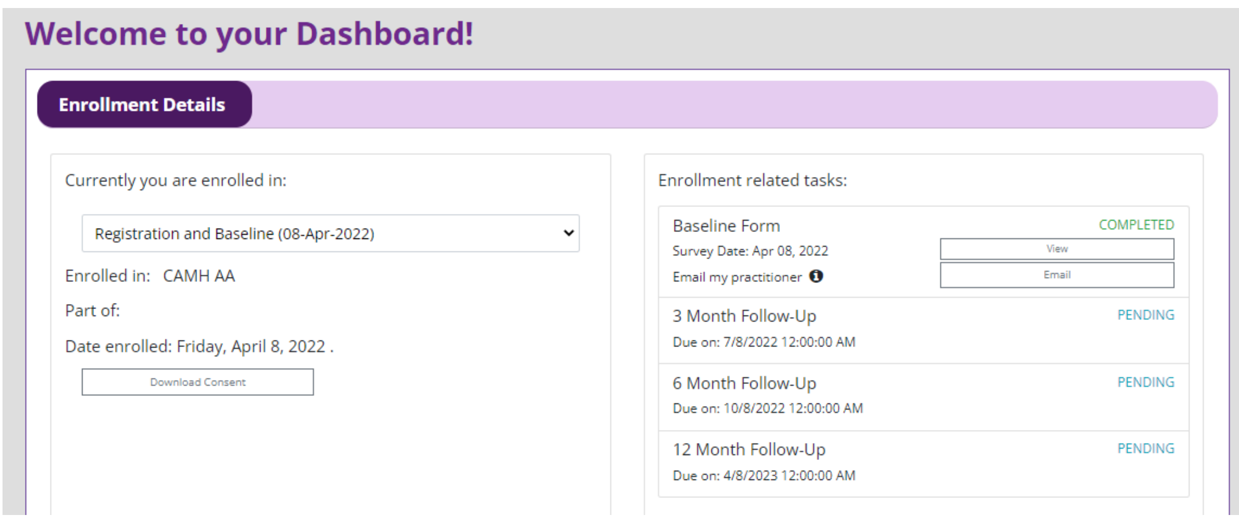
My STOP Portal Patient Dashboard

The My STOP Portal Patient Dashboard is an online platform where self-enrolled patients can access their own information as well as tools and self-help resources to support them in the STOP Program.

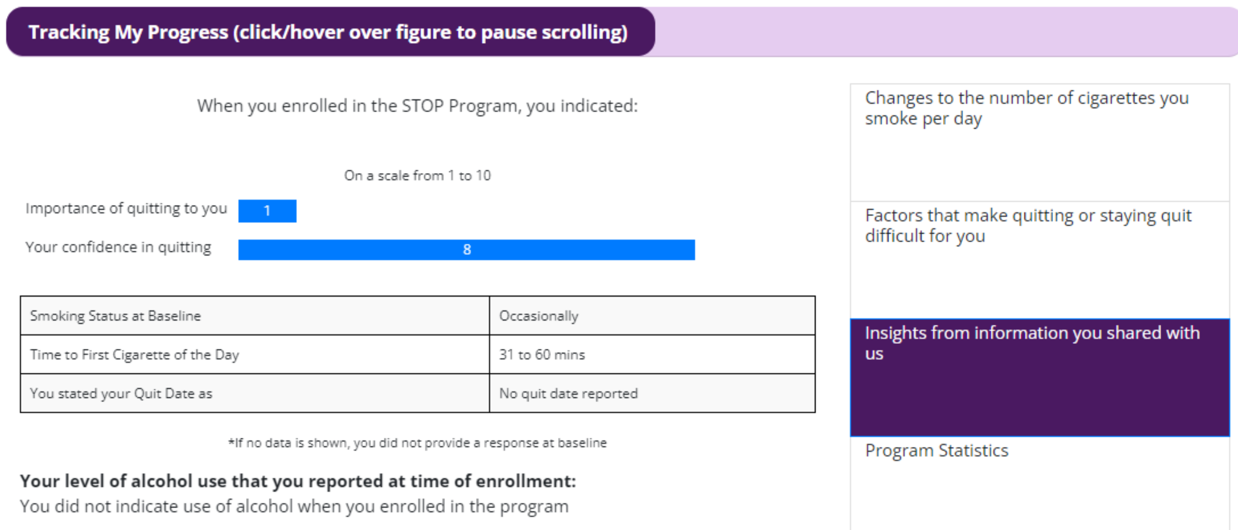
- Once a patient self-enrolls into the STOP Program they will be re-directed to their STOP Patient Dashboard
- Patients can access their Patient Dashboard at any time via their My STOP Portal Account.
- The specific information contained in the Patient Dashboard is for the *patient only*; neither STOP staff nor STOP practitioners will have access to this information

The STOP Patient Dashboard is organized into three sections:

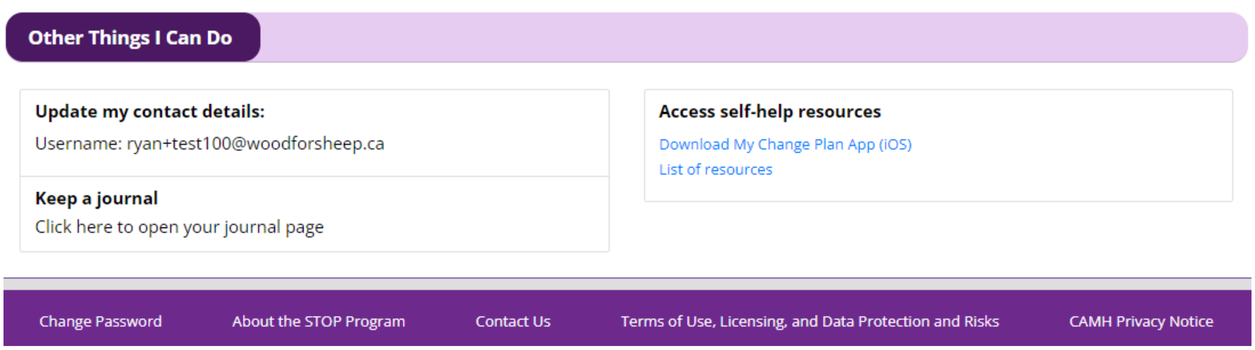
- **Enrollment Details:** This section includes details about the patient's STOP Program enrollment, including the clinic they enrolled at and the date they enrolled. It also provides links to upcoming STOP Program follow-up surveys that are due at 3, 6 and 12 months post-enrollment.



- **Tracking My Progress:** This section allows patients to view their progress in the STOP Program by comparing their enrollment data to data collected during follow-ups.
    - This includes changes in the patient's tobacco/nicotine use, factors that influence their tobacco/nicotine use and other program statistics.



- **Other Things I Can Do:** In this section patients will be able to manage their Patient Portal account and access tools and additional resources provided by CAMH. This includes:
    - Updating patient contact information
    - Participating in other research studies and programs at CAMH
    - Access to self-help resources
    - Creating a journal to track their feelings and progress
    - Re-setting their account password
    - Withdrawing from the STOP Program



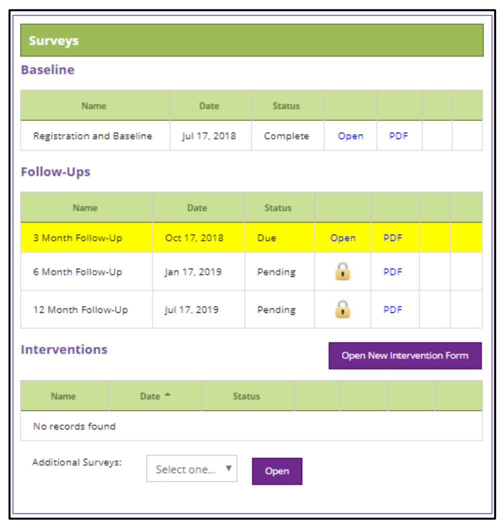
Re-Enrolling a Patient

In the event that a patient is marked as “Withdrawn” or “Consent Expired” on their profile (this will be displayed in red, near their consent date), but the patient wishes to re-enroll in the program, **a new consent discussion will need to take place and a new Registration and Baseline survey will need to be completed**. *Please note that patients can withdraw consent during their follow-up survey with CAMH staff. Practitioners at that site will be notified automatically by the STOP Portal notification system.*

- Take note of (write down) the original Patient ID # of the patient.
- Click “Enroll new patient/client”
- Complete the enrollment as if you were enrolling a new patient but add a “R1-“ prefix to the original patient ID # to mark it as a re-enrollment:
- E.g., if original enrollment was “12345”, re-enrollment is “R1-12345”; 2nd re-enrollment would be “R2-12345”, and so on

Conducting a Follow-Up Survey

When you are conducting a patient visit and their 3, 6 or 12-month follow-up survey is due, you may complete it with them.



- After opening a Patient Profile, if you see that a survey is highlighted in yellow under Follow-Ups, this means that this survey is ‘due’. Click on “Open” in the row that is highlighted yellow to launch the survey.

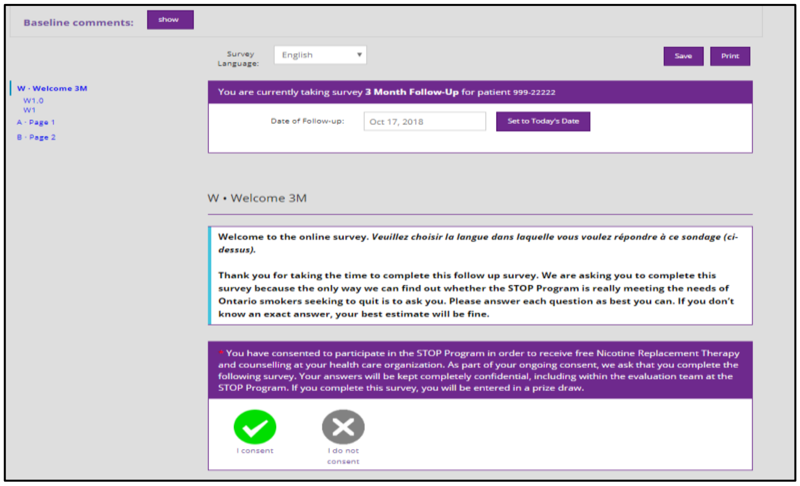
- The date should default to today’s date; please confirm at the top of the first page.

- Read the blue text to the patient (using preferred language – English or French). If the preferred language is French, select “French” from the Survey Language drop-down menu at the top right of the page.

- **Completing the follow up**: If the patient is unwilling to answer the questions for the follow-up at this time, they can still participate in the STOP Program. They will receive an email or a call from a STOP staff member to conduct the survey at a future date. In this case, do **NOT** click “I do not consent”; please go back to the Patient Profile by clicking on the Patient ID# link at the top of the page.

    - Ask the patient each question as it appears on the screen. A patient may choose to not answer a question, but we ask that they do their best to answer all

questions. If the patient is unable to provide a response, select “Don’t know/prefer not to answer” where applicable.
   - New questions may appear depending on the responses of the previous questions (built-in skip logic).
   - Click “Finish” to submit the survey. This will take you back to the Patient Profile.
   - On the Patient Profile, the status of this survey in the Follow-Ups section will now indicate that the survey is Complete.



Deceased Patients

In the event that you find out that one of your STOP patients has passed away *within their 1-year consent period* (even if that time has passed), their Patient Profile needs to be updated.

- On the Patient Profile, select “Edit” on the left side of the page (under Patient Details).
- Check the box next to “Deceased” and click “Save”. *This action cannot be reversed.*
- The Patient Profile will now state that the patient is deceased and all surveys will be locked.

Withdrawing a Patient

In the event that a patient chooses to withdraw their consent to participate in the STOP Program, their Patient Profile needs to be updated. **PLEASE NOTE that this action cannot be reversed and the patient will no longer be eligible to receive STOP Program NRT or participate in any follow-up surveys.**

1. On the Patient Profile, click the "Withdraw" button located on the left side of the page beside the Consent Date. This will open a pop-up box that asks you to <u>confirm</u> that you wish to withdraw the patient's consent. Please add a comment describing why and when the patient asked to be withdrawn.
   - Please note that the "Withdraw Consent" is a permanent feature. Do NOT withdraw patients if they discontinue the use of NRT, fail to attend follow-up appointments, or relapse to smoking. This feature is only to be used if the patient explicitly asks you to withdraw them from the study.

2. Click the "OK" button in the pop-up box to withdraw the patient's consent. *This action cannot be reversed!*
   - The Patient Profile will now indicate in red that the patient's consent has been withdrawn. Any comments made will be accessible by **hovering** your cursor over the icon to the right of the *Consent Withdrawn* notice.
   - At the top right of the page, a highlighted note will appear indicating that all of the patient's surveys are locked due to their consent being withdrawn.
   - Once withdrawn, the patient is <u>no longer eligible</u> to receive NRT unless they re-enroll in the program. You will <u>not</u> be able to launch a new Visit Form for the patient.

NOTE: Deceased patients are updated via the Deceased checkbox (see above), <u>not</u> by withdrawing them.

Inventory Management

Inventory Ordering

The STOP Portal allows **Main Collaborators** to order and receive new NRT inventory for their organization. Only those with a Collaborator account can place an order for NRT.

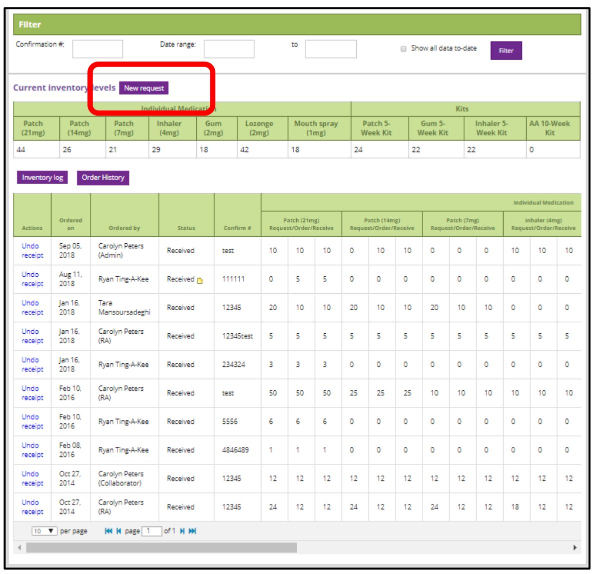
The NRT new request system is set up so that the Collaborator at each site can place a request online. At CAMH, our staff will review all the requests and place the actual orders with our supplier. The advantage to this system is that all inventory movement (NRT received and dispensed) is electronically tracked.

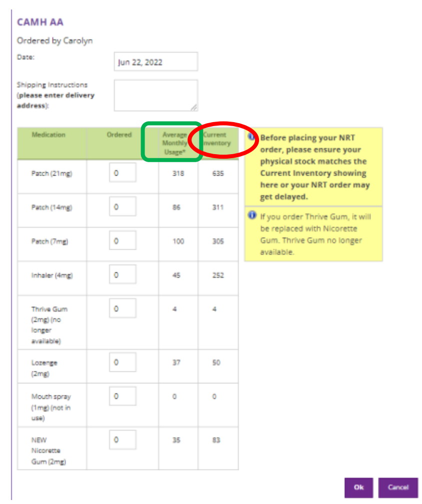
The actual amount ordered by CAMH will appear in the Order History. Once the NRT order has been received by you, the amount displayed will be the amount of NRT that CAMH actually *ordered*, which may not necessarily be the amount requested by the Collaborator. We will do our best to accommodate all requests.

Step 1	Step 2	Step 3
Collaborator makes new inventory request in the Portal	**STOP staff at CAMH review request and place order with supplier**	**Collaborator will note full or partial receipt of CAMH order in the Portal once it is delivered**

From the "Administration" drop-down menu at the top of any screen, select "Inventory and Orders". Your Current Inventory levels and your Order History will be displayed.

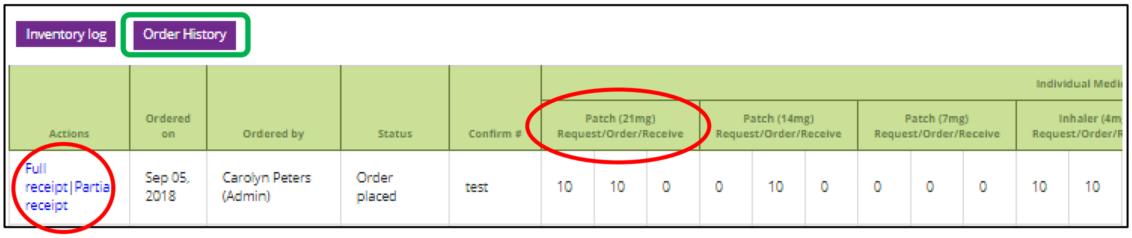
- Before placing a new NRT order request, it is very important to **ensure that your online inventory matches the actual count of NRT at your site**. Make sure all previous orders are received, all outstanding Visit Forms (if any) are entered, all expired products are removed from your inventory and all product movements are documented through an Inventory Adjustment (see below) on the Portal.





- Click the "New Request" button. A pop-up box will open with a list of the NRT products available to order. Type in the amounts you are requesting in the "Ordered" column. Use your "Average Monthly Usage" and your "Current Inventory" levels displayed in the other two columns to estimate quantities you are ordering.
  - Ideally, your new request plus your current inventory should last for about two months. **[Your new request= (your average monthly usage x 2) – (your current inventory)]**
- Click "OK" to place your request.
  - STOP staff will receive notification that a request for NRT has been placed.
  - When STOP staff have placed the NRT order with our supplier, the Order History will show both the "Request" made and the "Order" placed.

- Once the NRT shipment is received, the Collaborator will log in and go to "Inventory and Orders" to update the shipment status. Select either *Full Receipt* (if the full order was received) or *Partial Receipt* (if the products that were received are different from the order placed by CAMH). In the event of a partial receipt, only enter in the product amounts that were *actually* received. Tracking can then be done on what is still outstanding (contact your STOP Coordinator).


Inventory log | Order History

Actions	Ordered on	Ordered by	Status	Confirm #	Patch (21mg) Request/Order/Receive			Patch (14mg) Request/Order/Receive			Patch (7mg) Request/Order/Receive			Inhaler (4m Request/Order/R	
Full receipt|Partia receipt	Sep 05, 2018	Carolyn Peters (Admin)	Order placed	test	10	10	0	0	10	0	0	0	0	10	10

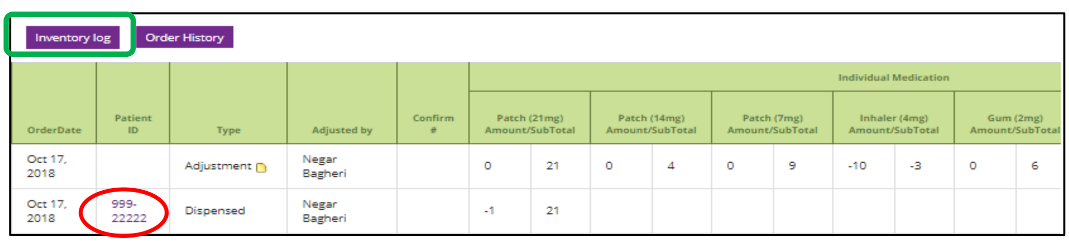
- The Inventory Log should now reflect the new amount of inventory at your organization/site.

NOTE: STOP staff may not be able to fulfill the requested amount from the Collaborator because supply of one particular NRT product may temporarily be limited. In the event that the amount *ordered* does not match the *request*, but <u>does</u> match the amount *received*, it is <u>not</u> considered a partial receipt. A partial receipt is only if the amount *received by courier* does not match the *order submitted by STOP staff* to our supplier.

Dispensing and Logging NRT

Please refer to the Intervention (Visit) Form instructions (page 17)

- After NRT is dispensed to a patient (and logged in the STOP Portal via a Visit Form), your inventory levels will automatically be adjusted. This will be reflected in the Inventory Log (see example below).


Inventory log | Order History

OrderDate	Patient ID	Type	Adjusted by	Confirm #	Patch (21mg) Amount/SubTotal		Patch (14mg) Amount/SubTotal		Patch (7mg) Amount/SubTotal		Inhaler (4mg) Amount/SubTotal		Gum (2mg) Amount/SubTotal	
Oct 17, 2018		Adjustment	Negar Bagheri		0	21	0	4	0	9	-10	-3	0	6
Oct 17, 2018	999-22222	Dispensed	Negar Bagheri		-1	21								

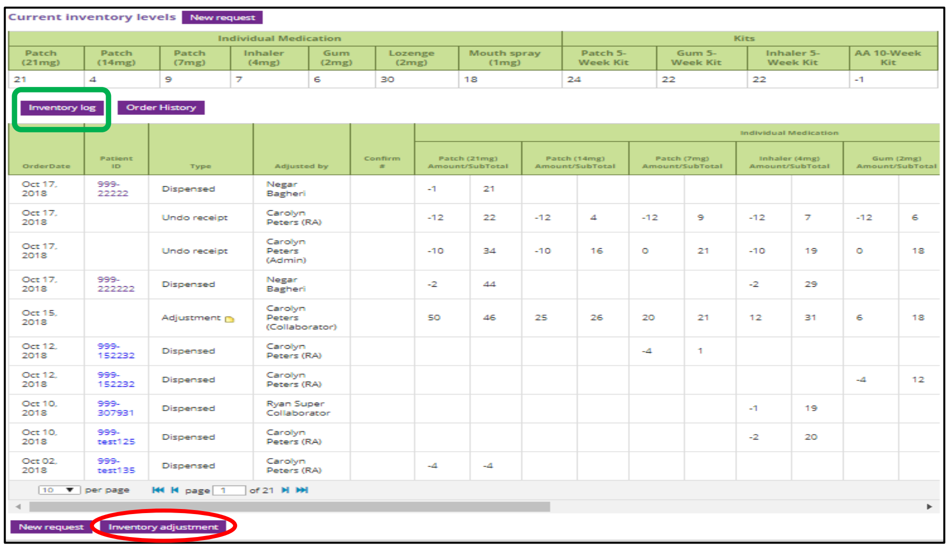
- To view the NRT last dispensed to a patient, go to their Patient Profile. Under Interventions on the right side of the page, you can either select "Open" (to view online) or "PDF" beside the most recent Visit Form completed. By downloading the PDF, you can choose to save or print the Visit Form. By viewing it online, the NRT dispensed will be shown at the bottom of the window.

Inventory Adjustments

An inventory adjustment needs to be completed if the actual amount of inventory in stock at your organization does not match the inventory levels of the online Inventory Log. This may happen in the following situations:

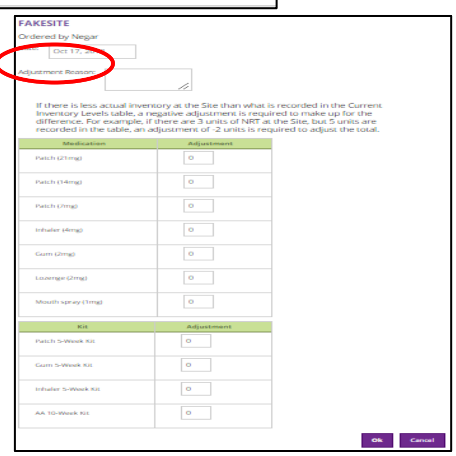
- When NRT has expired or will soon expire
- When NRT is sent to another site or received from another site
- When a box of NRT is opened for sampling by patients

1. Go to “Inventory Log” from the “Inventory and Order” page and click on “Inventory Adjustment”. A pop-up box will open with a list of the NRT products.



2. When completing an inventory adjustment, you must <u>enter the reason</u> for the adjustment in the comments section of the Inventory Adjustment pop-up box.

3. The Inventory Adjustment table works by addition or subtraction. For example, if a box of lozenges is opened for sample, you will need to enter “**-1**” in the table for lozenges (don’t forget the minus sign!).



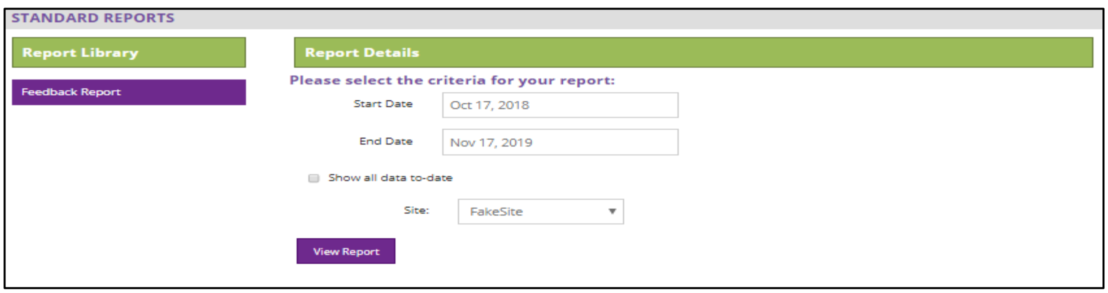
Reporting

Feedback Reports are available for download under the Reporting Menu. This report contains information from the Registration, Baseline, and Visit Questionnaires, as well as outcome data from the 3-, 6- and 12-month Follow-Up surveys. Your organization data will be displayed alongside data for other organizations of the same type.

When reviewing your report, please be conscious of small sample sizes, particularly if your organization only enrolls a few patients/clients each month or if you are selecting a short period of time for review.

Finally, if your organization has several locations that are considered ‘separate’ in the Portal (’multi-site’), then you will have to download a separate report for each site (they cannot be combined). Conversely, organizations that are ‘collapsed’ in the Portal cannot generate separate reports for each of their locations.

1. To download your report, select a Start Date and an End Date (and site if you belong to more than one site), and Click View Report. The report will take about 10-15 seconds to load.



2. Once the report loads, it can be viewed by selecting the blue arrow to scroll through the pages or it can be downloaded into a variety of formats (see image below).

Patients who have withdrawn are not included in the “due for follow-up numbers”; but if they completed a follow-up survey prior to withdrawing, these data are included.

Patients who re-enroll are counted as separate, unique patients for the purpose of this report.

Some notes about the data included in the report:

- Cumulative total of enrollments counts only the date range specified.
- Number of cigarettes per day (CPD) is for daily smokers only.
- The percentages for comorbidities do not add up to Total Comorbidities as a patient may have more than one.
- The number of patients indicating “not at all” for their smoking status and the number categorized as “yes” to the 7-day point prevalence abstinence (7-day PPA) question will not always match as these come from two different questions in the follow-up survey, which patients may answer differently. For example, some patients identify as non-smokers (‘self-report’) but fail to meet 7-day PPA criteria.

Download Forms and Resources

The “Download Forms” option in the drop-down menu allows for downloading the PDF versions of the paper Baseline, Registration, and Visit Forms. The most up-to-date versions of these forms can always be found here. You can also access take-home Educational Resources for patients under the ‘Resources’ tab.

If you are having trouble downloading the forms, please make sure that pop-ups are not blocked for the Portal website.

You can also request hardcopies of forms by selecting this menu option.