



STOP Program Online Portal Training Manual



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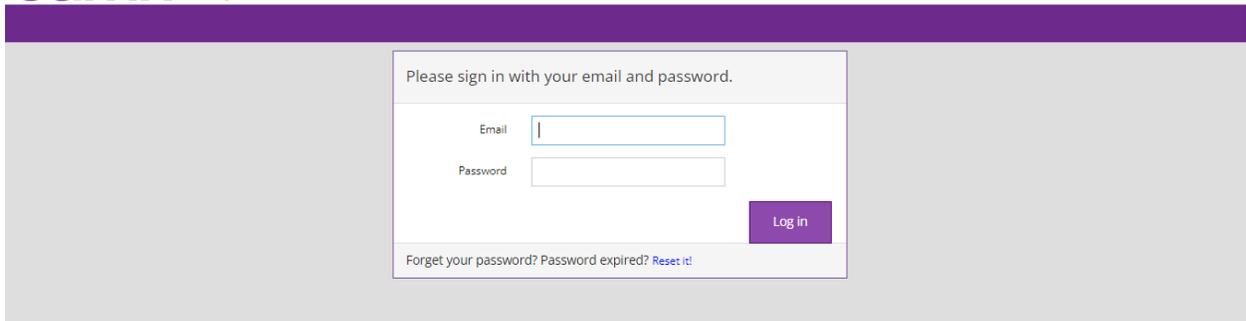
Introduction

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.

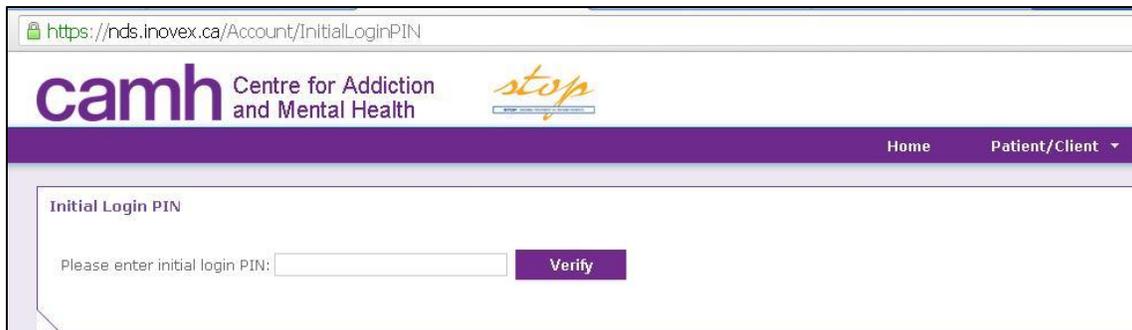
This manual provides instructions on how to use the online STOP Portal for relevant patient interactions and medication management. This manual is supplementary to the STOP Operations Manual.

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.

https://nds.inovex.ca/Account/ChangePassword

camh Centre for Addiction and Mental Health 

Home

Change password

i Use the form below to change your password. Password must be at least 8 characters consisting of at least three of the following conditions: English upper case letters(A-Z), English lower case letters(a-z), base digits(0-9), and Non-alphanumeric characters(I.E. !S#,%). Passwords cannot contain the user's email or parts of the user's full name that exceed two consecutive characters. Passwords cannot be any of the past 10 passwords. Password cannot be changed if it has been changed in the past 24 hours.

Current password:

New password:

Confirm new password:

Change

- 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.

My profile information

Last login: Jan 07, 2014

User class: Practitioner

Last name: Peters

First name: Carolyn

Phone:

Email: carolynpetersconsulting@gmail.com

i Please enter a security question and answer to that security question in the space below. An example might be "What was the name of your first dog?" and the answer might be "Rover". This question and answer will be asked of you if you ever forget your password to the system and need to have it reset.

Security question:

Security answer:

Password expiry date: Apr 07, 2014 10:34

Save

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:

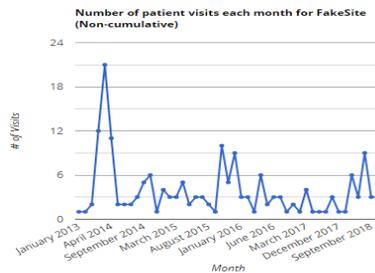
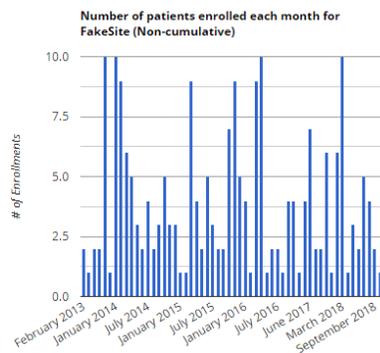
- “Enroll New Patient/Client” quick access button
- “Patient/Client Search” quick access button
- Ability to “Change Site” (relevant for practitioners who work at more than one organization and/or site)
- Current Inventory Levels
- Last 100 Encounters with patients at your organization, along with date,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

Current Inventory Levels

NRT	Quantity
Patch (14mg)	-1689
Mouth spray (1mg) (not in use)	0
Patch (21mg)	-5365
Patch (7mg)	-1795
NEW Nicorette Gum (2mg)	-317
Inhaler (4mg)	-748
Thrive Gum (2mg) (no longer available)	-296
Lozenge (2mg)	-850
Kits	Quantity

Last 20 Encounters

Patient ID	Date	Form status	Name
300-2115653	Jun 15, 2022	Incomplete	Registration and Baseline
300-2115627	Jun 13, 2022	Incomplete	Registration and Baseline
300-test1	Jun 10, 2022	Complete	Registration and Baseline
300-419537	Jun 02, 2022	Complete	Visit Form
300-419537	Jun 02, 2022	Complete	Registration and Baseline
300-411988	Jun 02, 2022	Complete	Visit Form
300-419361	Jun 01, 2022	Complete	Visit Form
300-419361	Jun 01, 2022	Complete	Registration and Baseline
300-419338	Jun 01, 2022	Complete	Visit Form
300-419338	Jun 01, 2022	Complete	Registration and Baseline

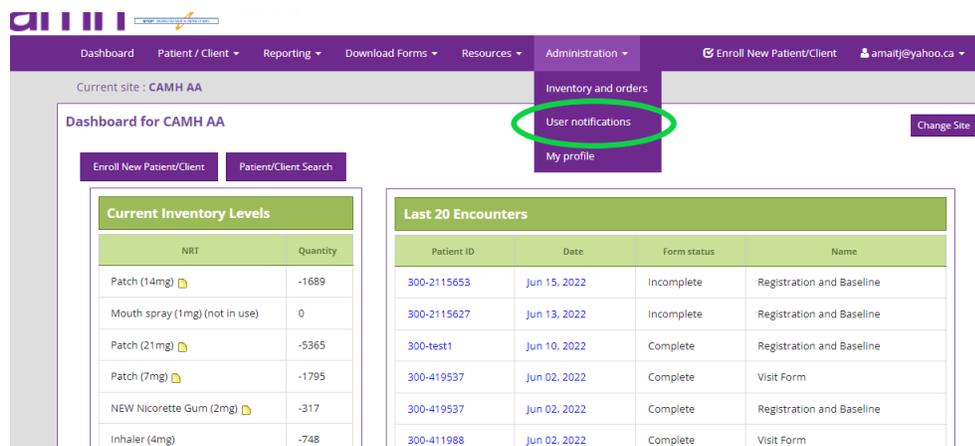


User notifications

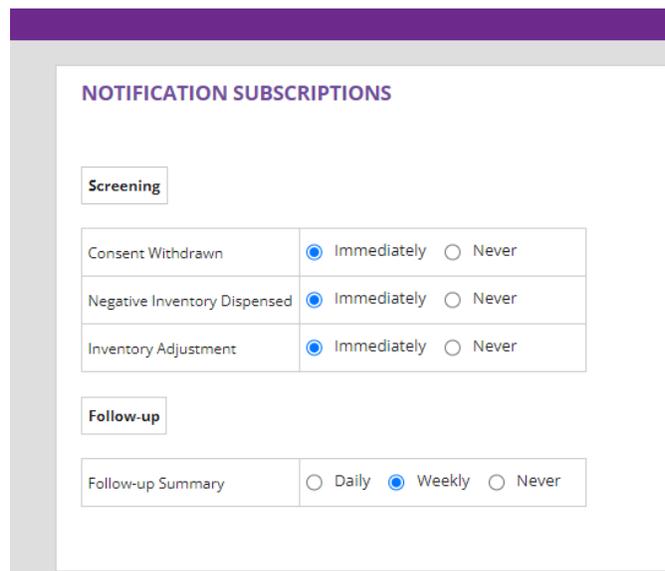
You can choose to receive notifications when:

- 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



The screenshot shows the 'Administration' dropdown menu in the STOP Portal. The 'User notifications' option is highlighted with a red circle. Other options in the menu include 'Inventory and orders' and 'My profile'. The main dashboard area shows 'Current site: CAMH AA' and various data tables.



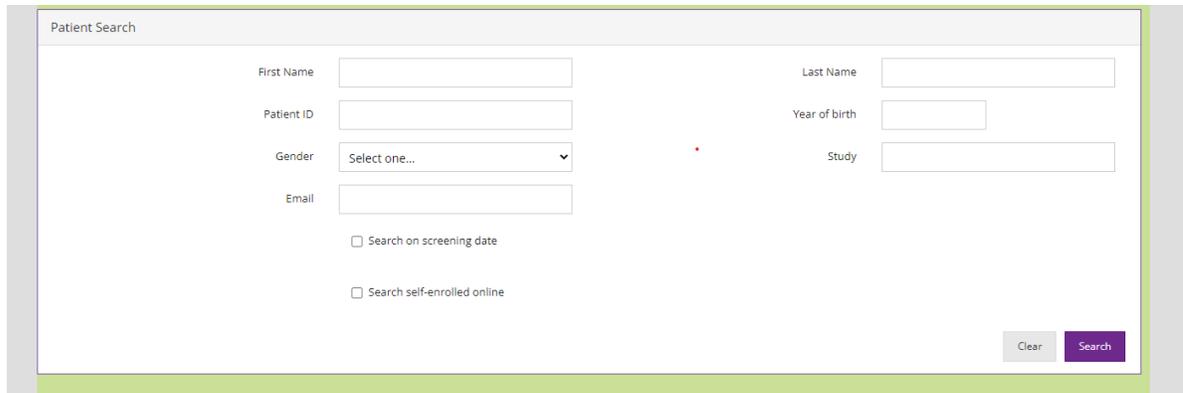
The screenshot shows the 'NOTIFICATION SUBSCRIPTIONS' page. It has two sections: 'Screening' and 'Follow-up'. In the 'Screening' section, 'Consent Withdrawn', 'Negative Inventory Dispersed', and 'Inventory Adjustment' are all set to 'Immediately'. In the 'Follow-up' section, 'Follow-up Summary' is set to 'Weekly'.

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).



The screenshot shows a web form titled "Patient Search". It contains several input fields: "First Name", "Last Name", "Patient ID", "Year of birth", "Gender" (a dropdown menu with "Select one..." and a downward arrow), and "Email". Below these fields are two checkboxes: "Search on screening date" and "Search self-enrolled online". At the bottom right of the form are two buttons: "Clear" and "Search".

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)

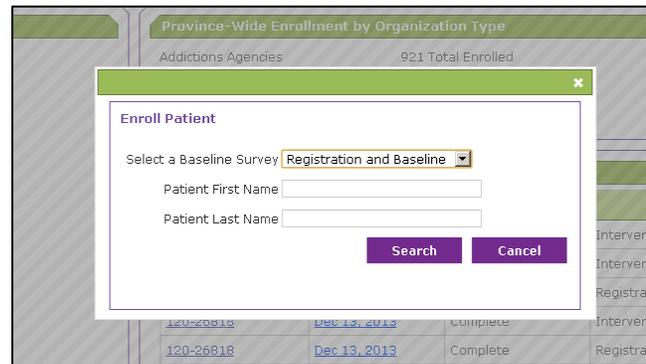
1) Practitioner-assisted enrollment

Name and Enrollment Date

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

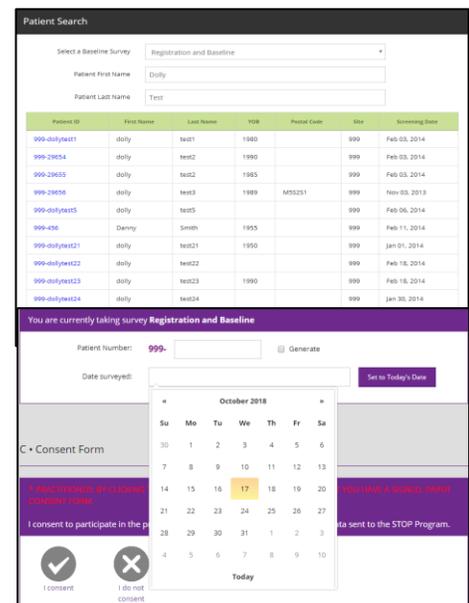
b. Select “Registration and Baseline,” and enter the patient’s First and Last Name in the respective fields.

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. Consent procedure must be completed 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 into the STOP Portal.

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 unique identifier 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.

* I AGREE I DO NOT AGREE

Optional Consent: You have the option of consenting to allow CAMH to collect your OHIP number to link your STOP information (as set out above) to your publicly-funded health care information at ICES for STOP Program planning and evaluation. You can refuse to provide your OHIP number without any impact on your eligibility to participate in the STOP Program.

I consent I do not consent

Optional Consent: You have the option of consenting to allow CAMH to contact you about future research studies, programs, or resources on smoking and other factors that may be relevant to you based on your STOP information. You can refuse to consent to being contacted without any impact on your eligibility to participate in the STOP Program. If you consent to be contacted, CAMH will use the CONTACT INFORMATION you have provided below (or any updated or subsequent contact information you provide) to contact you.

I consent I do not consent

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 **must** 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 required.

- 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, **we strongly recommend that Option A be used**, 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

Option A: 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.

ATTENTION! This patient has reported the following risk factor(s) that may affect their ability to quit smoking successfully:

Minimal depressive symptoms
 Low levels of physical activity
 Low levels of fruits & vegetables consumption

With permission, inform your patient of how these risk factors affect their chances of quitting successfully.

* Would you like guidance on how to discuss these risk factors with your patient?

Yes
 No

Elicit Information:
 "What do you know about the relationship between [insert risk factor(s)], and smoking?"

Provide Information:
 Patients report wanting **positive affirmation and encouraging messages.**

You can start by saying:
 "You've already made the effort to come here and get support for quitting smoking..."

- **Mood:** "Addressing your mood can also improve your chances of quitting smoking."
- **Physical activity:** "Physical activity can help you better manage cravings & withdrawal symptoms when quitting smoking"
- **Diet:** "Eating more fruits/vegetables can help you manage any weight gain during the quit process."

Elicit Again:
 "What do you think about this? What more would you like to know?"

- 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.

Self-monitoring is an effective technique for health behaviour change. STOP offers a customizable tracking sheet patients can use to track their risk factors.

Create this custom tracking sheet now: Would your patient like to self-monitor any of their risk factor(s)?
 (Please Note: Evidence recommends working on **smoking + 2 additional risk factors** (3 behaviours total) to optimize their chances of success. However, this decision is up to your patient.)

* Mood

Yes, patient accepted
 No, patient declined
 No, I did not offer

* Physical Activity

Yes, patient accepted
 No, patient declined
 No, I did not offer

* Diet

Yes, patient accepted
 No, patient declined
 No, I did not offer

* How would you like to share this/these resource(s) with your patient?

Email
 Print

* Email

Email:

Confirm Email:

- 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.

The screenshot shows a 'Comments:' text area at the top. Below it is a purple button labeled 'Finish', which is circled in red. At the bottom left, there is a 'Survey Language:' dropdown menu set to 'English'. At the bottom right, there are 'Save' and 'Print' buttons.

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.

The screenshot shows the 'Patient Profile - FakeSite' interface. On the left is the 'Patient Details' tab with fields for patient information (999-222222), contact info, and physician details. On the right is the 'Surveys' section with three tables: 'Baseline', 'Follow-Ups', and 'Interventions'. In the 'Baseline' table, the 'Status' for 'Registration and Baseline' is 'Complete', circled in green. In the 'Follow-Ups' table, the 'Status' for '12 Month Follow-Up' is 'Pending', with a 'PDF' button circled in red. In the 'Interventions' section, the 'Open New Intervention Form' button is circled in red. At the bottom right, there is a 'Show Recent Transactions' button.

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

NDS Test Site
camh *stop* Test Site

Welcome to Self-Enrollment with the STOP Program!

Do you have a My STOP Portal Account? Yes No

If you already have a My STOP Portal Account and would like to access your personalized STOP Patient Dashboard, please click [here](#).

If you would like to learn more about how My STOP Portal works to protect your privacy and/or have any questions about the My STOP Portal platform, please visit: [Terms and Conditions](#)

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.

The screenshot shows a patient self-enrollment form with a modal window overlay. The modal window, titled "Important: Account Details", contains the following text: "Thank you for self-enrolling in the STOP Program! To complete your STOP registration and initiate treatment, you must make an appointment at your clinic within the next 45 days. Please bring your OHIP card and Reference Number (below) with you to your first appointment. We have also sent your Reference Number to the email address you provided in the STOP enrollment questionnaire." Below this text, the "Reference Number:" is listed as "b32e0714-5". Further down, it says: "You will now be taken to your STOP Patient Dashboard, which provides a summary of your treatment history as well as some helpful resources. To access it again in the future, please go to www.MySTOPPortal.ca and log in using your My STOP Portal Account." An "Ok" button is located at the bottom right of the modal. In the background, the form includes question 39 about self-employment, question 41 about who first advised the patient to quit, and question 42 about the main reason for seeking treatment. A "Finish" button and a link to download the consent form are also visible.

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.

NDS Test Site
camh stop Test Site

Dashboard Patient / Client Reporting Download Forms Resources Administration

Enroll New Patients/Client amany@yahoo.ca

Patient Search

First Name Last Name

Patient ID Year of birth

Gender Study

Search on screening date

Search self-enrolled online

Clear Search

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.

Patient Search

Patient ID

Email Reference Number

Search self-enrolled online

Clear Search

Search Results

Patient ID	Last Name	First Name	Contact Information	YOB	Gender	PostalCode	Enrollment Date	Study
000-2105567	test100	Ryan	ryan+test100@woodforsheep.ca	1982	M		Apr 08, 2022	Enroll

20 per page page 1 of 1

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.

ndsc3-test.inovex.ca says

If your participant self-enrolled through My STOP Portal, you must review their responses to the baseline questionnaire with them. Please always select Option A for these participants.

OK

* PRACTITIONER: If your participant self-enrolled through My STOP Portal, do NOT select Option B. Please select Option A and review their responses with them.

* 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.

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: (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	<input type="text"/>	<input type="text"/>
Patch (14mg)	0	<input type="text"/>	<input type="text"/>
Patch (7mg)	0	<input type="text"/>	<input type="text"/>
Inhaler (4mg)	0	<input type="text"/>	<input type="text"/>
Thrive Gum (2mg) (no longer available)	0	<input type="text"/>	<input type="text"/>
Lozenge (2mg)	0	<input type="text"/>	<input type="text"/>
Mouth spray (1mg) (not in use)	0	<input type="text"/>	<input type="text"/>
NEW Nicorette Gum (2mg)	0	<input type="text"/>	<input type="text"/>

ⓘ

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

The screenshot displays the 'Welcome to your Dashboard!' header. Below it is a purple bar with the 'Enrollment Details' tab selected. The main content area is divided into two columns. The left column, titled 'Currently you are enrolled in:', shows a dropdown menu with 'Registration and Baseline (08-Apr-2022)' selected. Below this, it lists 'Enrolled in: CAMH AA', 'Part of:', and 'Date enrolled: Friday, April 8, 2022'. A 'Download Consent' button is at the bottom. The right column, titled 'Enrollment related tasks:', lists three tasks: 'Baseline Form' (COMPLETED), '3 Month Follow-Up' (PENDING), '6 Month Follow-Up' (PENDING), and '12 Month Follow-Up' (PENDING). The 'Baseline Form' task includes 'Survey Date: Apr 08, 2022' and buttons for 'View' and 'Email my practitioner'. The '3 Month Follow-Up' task has a due date of '7/8/2022 12:00:00 AM'. The '6 Month Follow-Up' task has a due date of '10/8/2022 12:00:00 AM'. The '12 Month Follow-Up' task has a due date of '4/8/2023 12:00:00 AM'.

- **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.

Tracking My Progress (click/hover over figure to pause scrolling)

When you enrolled in the STOP Program, you indicated:

On a scale from 1 to 10

Importance of quitting to you **1**

Your confidence in quitting **8**

Smoking Status at Baseline	Occasionally
Time to First Cigarette of the Day	31 to 60 mins
You stated your Quit Date as	No quit date reported

*If no data is shown, you did not provide a response at baseline

Your level of alcohol use that you reported at time of enrollment:

You did not indicate use of alcohol when you enrolled in the program

Changes to the number of cigarettes you smoke per day

Factors that make quitting or staying quit difficult for you

Insights from information you shared with us

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

Other Things I Can Do

Update my contact details:

Username: ryan+test100@woodforsheep.ca

Keep a journal

Click here to open your journal page

Access self-help resources

[Download My Change Plan App \(iOS\)](#)

[List of resources](#)

[Change Password](#)

[About the STOP Program](#)

[Contact Us](#)

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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.

The screenshot displays the 'Surveys' section of a patient profile. It is divided into 'Baseline' and 'Follow-Ups' sections. The 'Baseline' section contains one survey: 'Registration and Baseline' with a date of 'Jul 17, 2018' and a status of 'Complete'. The 'Follow-Ups' section contains three surveys: '3 Month Follow-Up' (Oct 17, 2018, Due, highlighted in yellow), '6 Month Follow-Up' (Jan 17, 2019, Pending), and '12 Month Follow-Up' (Jul 17, 2019, Pending). Each survey row includes an 'Open' button and a 'PDF' icon. Below the surveys is an 'Interventions' section with a button to 'Open New Intervention Form' and a table with no records found. At the bottom, there is an 'Additional Surveys' section with a dropdown menu and an 'Open' button.

Name	Date	Status	Open	PDF
Registration and Baseline	Jul 17, 2018	Complete	Open	PDF

Name	Date	Status	Open	PDF
3 Month Follow-Up	Oct 17, 2018	Due	Open	PDF
6 Month Follow-Up	Jan 17, 2019	Pending	Open	PDF
12 Month Follow-Up	Jul 17, 2019	Pending	Open	PDF

- 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.

Baseline comments: [Show](#)

Survey Language: English [Save](#) [Print](#)

You are currently taking survey **3 Month Follow-Up** for patient 999-22222

Date of Follow-up: Oct 17, 2018 [Set to Today's Date](#)

W - Welcome 3M

Welcome to the online survey. Veuillez choisir la langue dans laquelle vous voulez répondre à ce sondage (ci-dessus).

Thank you for taking the time to complete this follow up survey. We are asking you to complete this survey because the only way we can find out whether the STOP Program is really meeting the needs of Ontario smokers seeking to quit is to ask you. Please answer each question as best you can. If you don't know an exact answer, your best estimate will be fine.

You have consented to participate in the STOP Program in order to receive free Nicotine Replacement Therapy and counselling at your health care organization. As part of your ongoing consent, we ask that you complete the following survey. Your answers will be kept completely confidential, including within the evaluation team at the STOP Program. If you complete this survey, you will be entered in a prize draw.

I consent I do not consent

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.

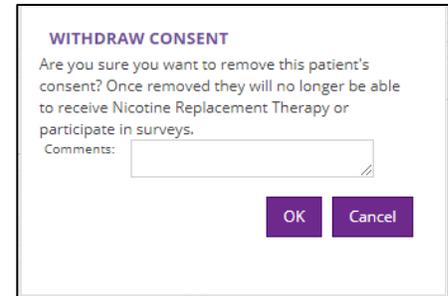
- On the Patient Profile, select “Edit” on the left side of the page (under Patient Details).
- Check the box next to “Deceased” and click “Save”. *This action cannot be reversed.*
- The Patient Profile will now state that the patient is deceased and all surveys will be locked.

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 confirm 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.



WITHDRAW CONSENT
Are you sure you want to remove this patient's consent? Once removed they will no longer be able to receive Nicotine Replacement Therapy or participate in surveys.
Comments:
OK **Cancel**

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 no longer eligible to receive NRT unless they re-enroll in the program. You will not be able to launch a new Visit Form for the patient.

NOTE: Deceased patients are updated via the Deceased checkbox (see above), not 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
Collaborator makes new inventory request in the Portal

Step 2
STOP staff at CAMH review request and place order with supplier

Step 3
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.

The screenshot displays the CAMH Portal interface for inventory management. At the top, there is a 'Filter' section with fields for 'Confirmation #', 'Date range', and a 'Filter' button. Below this is the 'Current Inventory Levels' section, which includes a 'New Request' button highlighted with a red box. The 'Current Inventory Levels' table has columns for 'Patch (21mg)', 'Patch (14mg)', 'Patch (7mg)', 'Inhaler (4mg)', 'Gum (2mg)', 'Lozange (2mg)', 'Mouth spray (1mg)', 'Patch 5-Week Kit', 'Gum 5-Week Kit', 'Inhaler 5-Week Kit', and 'AA 10-Week Kit'. Below this is the 'Order History' section, which includes a table with columns for 'Actions', 'Ordered on', 'Ordered by', 'Status', 'Confirm #', and 'Individual Medication'. The 'Individual Medication' table has columns for 'Patch (21mg) Request/Order/Receipt', 'Patch (14mg) Request/Order/Receipt', 'Patch (7mg) Request/Order/Receipt', and 'Inhaler (4mg) Request/Order/Receipt'. To the right of the 'Current Inventory Levels' table is the 'New Request' table, which has columns for 'Medication', 'Ordered', 'Average Monthly Usage', and 'Current Inventory'. The 'Average Monthly Usage' and 'Current Inventory' columns are highlighted with a red box. Below the 'New Request' table is a warning message: 'Before placing your NRT order, please ensure your physical stock matches the Current Inventory showing here or your NRT order may get delayed. If you order Thrive Gum, it will be replaced with Nicorette Gum. Thrive Gum no longer available.' At the bottom right of the 'New Request' table are 'OK' and 'Cancel' buttons.

- 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		Individual Medication											
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 Partial 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 does match the amount *received*, it is not 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		Individual Medication										
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.

Current Inventory Levels New request											
Individual Medication								Kits			
Patch (21mg)	Patch (14mg)	Patch (7mg)	Inhaler (4mg)	Gum (2mg)	Lozenge (2mg)	Mouth spray (1mg)		Patch 5-Week Kit	Gum 5-Week Kit	Inhaler 5-Week Kit	AA 10-Week Kit
21	4	9	7	6	30	18		24	22	22	-1

Inventory log		Order History		Individual Medication									
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	999-22222	Dispensed	Negar Bagheri		-1	21							
Oct 17, 2018		Undo receipt	Carolyn Peters (RA)		-12	22	-12	4	-12	9	-12		
Oct 17, 2018		Undo receipt	Carolyn Peters (Admin)		-10	34	-10	16	0	21	-10		
Oct 17, 2018	999-22222	Dispensed	Negar Bagheri		-2	44			-2	29			
Oct 15, 2018		Adjustment	Carolyn Peters (Collaborator)		50	46	25	26	20	21	12		
Oct 12, 2018	999-152232	Dispensed	Carolyn Peters (RA)					-4	1				
Oct 12, 2018	999-152232	Dispensed	Carolyn Peters (RA)								-4		
Oct 10, 2018	999-307931	Dispensed	Ryan Super Collaborator							-1	19		
Oct 10, 2018	999-test125	Dispensed	Carolyn Peters (RA)							-2	20		
Oct 02, 2018	999-test135	Dispensed	Carolyn Peters (RA)		-4	-4							

10 per page | page 3 of 21

New request Inventory adjustment

2. When completing an inventory adjustment, you must enter the reason 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!).

FAKESITE

Ordered by Negar Oct 17, 2018

Adjustment Reason:

If there is less actual inventory at the Site than what is recorded in the Current Inventory Levels table, a negative adjustment is required to make up for the difference. For example, if there are 3 units of NRT at the Site, but 5 units are recorded in the table, an adjustment of -2 units is required to adjust the total.

Medication	Adjustment
Patch (21mg)	0
Patch (14mg)	0
Patch (7mg)	0
Inhaler (4mg)	0
Gum (2mg)	0
Lozenge (2mg)	0
Mouth spray (1mg)	0
Kits	Adjustment
Patch 5-Week Kit	0
Gum 5-Week Kit	0
Inhaler 5-Week Kit	0
AA 10-Week Kit	0

OK Cancel

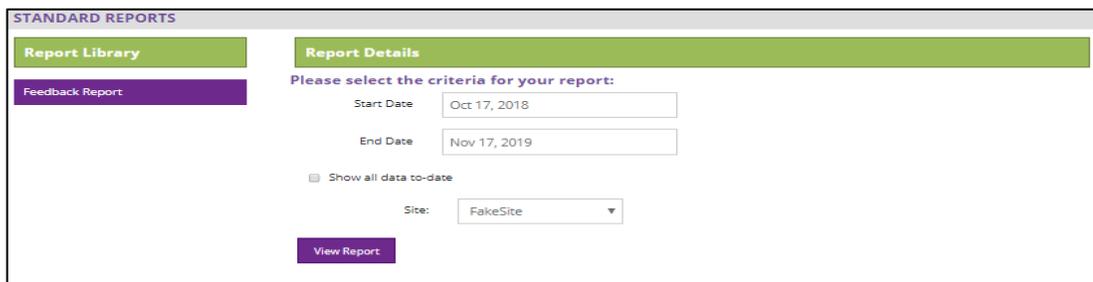
Reporting

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.

The image displays two screenshots of the STOP Portal interface. The left screenshot shows the 'Download Forms' dropdown menu open, listing options: Blank Baseline Form PDF, Blank Registration Form PDF, Blank Visit Form PDF, Blank French Baseline Form PDF, Blank French Registration Form PDF, Blank French Visit Form PDF, and Request Hardcopies. The right screenshot shows the 'Resources' dropdown menu open, listing options: Alcohol Reduce PDF, Alcohol Abstain PDF, Sleep PDF, Physical Activity PDF, Nutrition PDF, Stress PDF, Mood Management PDF, and STOP Certificate. Both screenshots show the portal's navigation bar with 'Download Forms', 'Resources', and 'Administration' tabs, and a 'Follow-up Snapshot' section with filters for Survey Type and Organization Type.