BloodSTAR User Acceptance Testing Scenarios
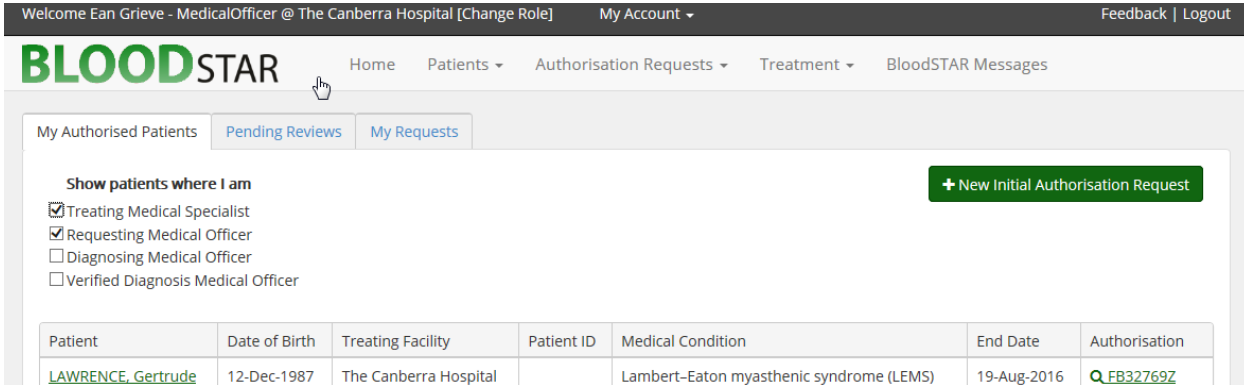
This document guides you through a set of common scenarios in Blood**STAR** (**S**ystem for **T**racking **A**uthorisations and **R**eviews). Use this document to conduct structured testing, before undertaking a process of self-guided discovery.

Remember you can provide feedback throughout your testing by clicking the Feedback button at the top right corner of each page.

Logging In

For the purposes of testing you will use a web address specific to our user acceptance testing environment.

1. Enter the address into your browser:

    https://test.blood.gov.au/UAT/BloodStar/

    You will be directed to the BloodPortal login screen.

2. Enter the username and password provided and click Log In

    If you are a registered user of other NBA systems do not enter your regular BloodPortal login details. You will not be able to access the UAT environment with these credentials.

Authorisation Request Assessment

This testing exercise is coordinated with the Australian Red Cross Blood Service; the contracted service provider for authorising requests. All requests will be assessed by midday each day during the testing exercise. This will allow you to see the result of your requests.

Medical Officer Home Page

When you begin your testing you will arrive at the Medical Officer Home Page.

Some users will not have any patients in this list when beginning the UAT exercise, however as you progress through scenarios the list will become populated with patient records that you have created.

My Authorised Patients Tab
This table provides ready access to Active Authorisations for which you are involved as the Treating Medical Specialist or Requesting Medial Officer or where you have been recorded as being involved in the diagnosis.

Pending Reviews Tab
This table displays patients for which are you are involved as the Treating Medical Specialist where a review is required within the next eight weeks (unless a review has already been submitted) or where a review is overdue.

My Request Tab
This table displays the history of authorisation requests (initial and continuing), dose change requests and additional dose requests that you have submitted. This list can be quickly filtered in order to find a particular request.

Unread Messages
As authorisation requests are approved, become due for review and expire, notifications are sent to you. A list of unread notifications will be displayed on your homepage.

Don't forget to return to this page once your authorisation requests are approved so that you can easily access authorisations that are relevant to you.

The Patient Record

There are a number of different ways that you can access a patient record.

Scenario: Accessing a patient record from My Authorised Patients List

1.   Click the patient's name from the **My Authorised Patients** list on the Home Page.

The patient record will be displayed.

Alternative Scenario: Accessing a patient record by searching

1.   Select **Search** from the **Patients** menu at the top of the page.

2.   Enter some search criteria and click search

3.   From the search results select **View**

The patient record will be displayed.

The information in the system about a patient is deliberately limited. BloodSTAR is not a clinical registry of patients but is a system for gaining authorisation to access government funded immunoglobulin products.

Facility Identifiers

Facility Identifiers are the MRNs or URNs or other identifiers given to a patient at a facility. A patient may be a patient at multiple facilities. You can add a facility identifier for each of those facilities.

A facility identifier is made up of two parts:

- the facility name; and
- The Patient ID (MRN, URN, etc).

In jurisdictions where the same identifier is used across all hospitals you should still add a facility identifier at each of the hospitals that the patient is receiving treatment. Failing to record these identifiers at each facility will limit access to the patient record when privacy controls are implemented.

Do not prescribe
Do not prescribe advisories can be added to a patient record by a medical officer when they recommend that a patient is not prescribed a nominated immunoglobulin product.

The system will use these advisories during the authorisation processes to alert prescribers and authorisers in order to avoid authorising a product that may be inappropriate for a patient.

Note that this functionality is not an adverse events register.

Authorisation Requests
The list of authorisation requests shows the history of authorisation requests made in the name of the patient. Where the request was approved, the authorisation number is displayed as a link to click through to view the authorisation.

Privacy Consent Records
All patients recorded in BloodSTAR are required to have provided their consent to the collection, retention and use of personal information. The privacy consent records table shows the history of a patient's privacy consent.

The patient's current consent status is based on the latest consent record.

On withdrawal of privacy consent, any existing Authorisations in the patient's name will be immediately terminated and the patient will no longer have access to immunoglobulin treatment under the national blood arrangements.

Frequently Asked Questions

How do patients get into BloodSTAR?

Patients are only entered into BloodSTAR if they the subject of an authorisation request as such, the patient record can only be created at the time that you are submitting a request.

How can we avoid creating duplicate patients?

During the patient creation process (while entering an authorisation request) the system will identify potential duplicates and prompt the prescriber to check that the patient is the same person.

A secondary administrative process will be undertaken periodically to manage duplicate patient records. This process will include liaison with the patient's clinical team to ensure that data is maintained correctly.

How does the system protect patient privacy?

We will maintain the privacy of the patient by only allowing users who need the information to see the information. Generally as a medical officer you will be able to see patients in the system who are receiving treatment at the Hospital or Treatment facility at which you are logged in as well as patients at other facilities that you have treating relationship. This approach aims to balance the right to privacy of patients with the realities of shared care scenarios and aligns to the scope of information visibility in other in-hospital systems.

Requesting Authorisation for Immunoglobulin Treatment

An initial authorisation request in BloodSTAR replaces the current paper forms and fax.

The BloodSTAR authorisation form is a dynamic form, configured to only prompt you for the information required for the medical condition that you are requesting to access government funded immunoglobulin products.

The steps of an initial authorisation request are as follows:

Initiate a Request	Treatment Arrangements, Diagnosis and Criteria	Specify your requested doses	Submit the Form
•Enter Patient Details •Select Treating Medical Specialist	•Treatment Arrangements •Diagnosis •Criteria •Supporting Evidence		
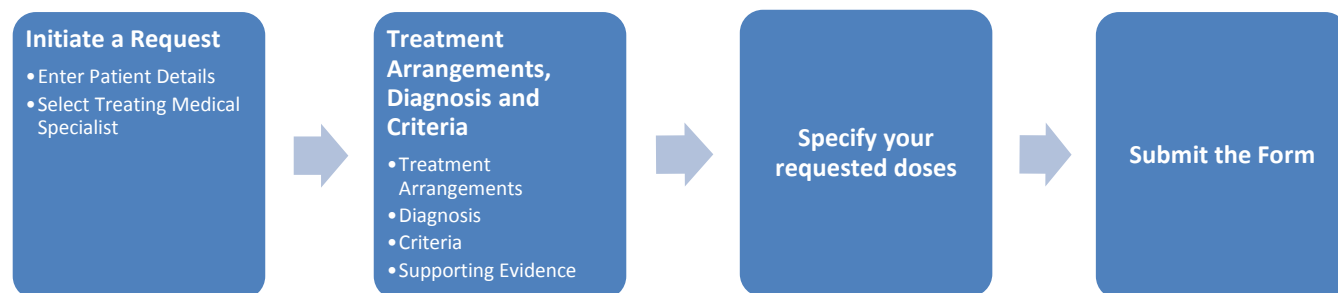
Initiating a request and entering Patient details

All authorisation requests must be made in the name of a patient.

It is possible that the patient for whom you are requesting treatment is already recorded in the system (perhaps from a previous course of treatment). BloodSTAR seeks to mitigate duplicate records being created for the same patient by first searching for a patient before creating a new patient record.

In addition, the system will check for duplicate records again when you save the patient information.

BloodSTAR is not a clinical registry. As such there is no mechanism to create a patient record unless you are doing so for the purposes of requesting authorisation to access government funded immunoglobulin products.

Scenario: Entering patient details for an initial authorisation request

A patient has been diagnosed with a condition for which you or the specialist has determined that Immunoglobulin treatment is appropriate. You wish to request Ig treatment and to your knowledge the patient is not currently authorised to receive Ig treatment.

1. From your homepage, select **New Initial Authorisation Request**
   The system will prompt you to enter search criteria.

2. Enter some search criteria and click **Search**.
   To mitigate duplicate entries the system requires you to search for your patient first.

3. If your patient is not returned in your search results you may create a new patient by clicking **Create New Patient.**

4. Fill out the patient details form (values from your search criteria are pre-populated to avoid double entry).

5. Under the Privacy Consent section, you can download documents to be provided to your patient for information and signing.

6. Record Privacy Consent details.

7. Click **Save.**

The patient details are saved and populated into the Initial Authorisation Request Form.

Once the form is displayed you may select an urgency for the request.

Treating Medical Specialist

The authorisation request form captures information about the medical officers involved in the request.

The **Treating Medical Specialist** is the specialist who is responsible for the long term management of the patient's treatment. This may or may not be the same as person completing the form. For example, a specialist may delegate the task of requesting authorisation to a junior medical officer. In this scenario the junior medical officer is the Requesting Medical Officer (RMO) and must enter the specialist's details as the Treating Medical Specialist.

When entering the details of a treating medical specialist, BloodSTAR first asks you to search for an existing record for the specialist at the facility from which the request is made. If the specialist is not already registered in BloodSTAR, the user can enter details to register the specialist in the system.

If the specialist is already registered in the system but does not have a record at the facility from which the request is being made, the RMO must enter the position and contact details of the specialist at the facility. BloodSTAR will create a record for that specialist at the facility.

Scenario: Selecting a Treating Medical Specialist already registered in BloodSTAR
You do not need to complete these steps if you are nominating yourself as the Treating Medical Specialist.

1.   Click **Change Treating Medical Specialist.**

2.   Enter the name of the specialist in the search box.
The system will prompt you as you type from a list of specialists registered in the system.

3.   Click **Search.**

4.   From the search results select the correct specialist's record at the facility from which authorisation is being requested.

The specialist's details will be populated into the authorisation request form.

Alternate Scenario: Selecting a Treating Medical Specialist that is registered in the system but not at the facility
This scenario arises after searching where you can see the specialist's name but with no record at the facility from which authorisation is requested.

1.   Select **Add New Facility.**

2.   Complete details of the specialist's position at the facility.
The phone numbers and email address should be the phone numbers and email address on which the specialist can be contacted.

3.   Select **Save.**

The specialist will be associated with the request as the Treating Medical Specialist and the new facility will be added to the specialist's profile for the future.

Treatment Arrangements

The treatment arrangements panel sets out the facilities involved in the treatment of the patient.

Treating Facility – The facility from which the patient's treatment will be managed.

Administering Facility – The facility that the patient will attend to receive infusions. In most cases this will be the same as the Treating Facility.

Dispensing Facility – The lab or dispenser from which product would normally be dispensed for this authorisation.

Scenario: Entering Treatment Arrangements

1.   Click **Save and Continue** after completing step one to move to step 2.

The system pre-populates the treating and administering facilities based on the facility of the Treating Medical Specialist. The dispensing facility may be prepopulated to a dispenser from which the administering facility would normally receive product.

2.   Enter Treatment arrangements

Throughout the system, drop down lists have been designed so that you can type part of the name you want to select. The system will filter the list as you type.

Diagnosis and Criteria

The diagnosis and criteria step records information about the patient's diagnosed condition and the criteria that your patient's condition meets.

This part of the form is highly dynamic – the form reconfigures fields based on the data that you enter into the form. The form is driven by the *Criteria for the clinical use of intravenous immunoglobulin in Australia*.

Scenario: Recording Diagnosis and Criteria	

1. Type in the name of the medical condition for which you wish to request immunoglobulin.
   The system will search conditions as you type. Once the condition you are looking for is displayed, select the condition.

2. Select a **Specific Condition** and **Indication** from the drop down lists.
   The qualifying criteria pertaining to the selected indication will be displayed. You may also be required to declare that the patient does not meet any of the exclusion criteria.

3. Many conditions require a diagnosis to be made by a medical officer holding particular specialist registration. Type the name of the specialist that diagnosed the condition.
   Specialists holding the appropriate speciality registration are displayed at the top of the list.

   If you cannot find the diagnosing medical officer you can select **Cannot Find Practitioner** and enter name and details manually.

   For this UAT exercise, select the medical officer at the top of this list so that a medical officer with the appropriate speciality registration is selected.

4. Select the qualifying criteria that you patient's condition meets.
   As you select qualifying criteria additional fields will be displayed under the heading Supporting Evidence

5. Complete the required evidence fields.

6. Click **Save and Continue**

Alternate Scenario: Recording Diagnosis and Criteria for an exceptional use or unsupported medical condition

Alternate Scenario: Recording Diagnosis and Criteria for an exceptional use or unsupported medical condition

This scenario is applicable to medical conditions in chapters 7 (Exceptional use) and 8 (Not Supported) of the criteria.

1.　Type in the name of the medical condition for which you wish to request immunoglobulin.
The system will search conditions as you type.

　　If the medical condition is part of the exceptional use or unsupported medical condition you can select the medical condition from the drop down list as you type.

　　As these medical conditions do not have any formal criteria defined you will be prompted to provide additional details to make your case for access to immunoglobulin.

2.　Complete the **Reason for required access to treatment** and **Detail other therapies tried and patient's response**.

3.　Upload any attachments

4.　Click **Save and Continue**.

Specifying Requested Doses

In the third step of the Initial Authorisation Request the medical officer is required to nominate the product and dose that they wish to prescribe.

Dosing is based on the patient's weight. At the prescriber's discretion the dose may be calculated on the basis of Ideal Body Weight Adjusted Dosing.

While setting up doses the system will evaluate your proposed dose against the doses permitted in the criteria. The system will not stop you from requesting a dose outside the criteria, however, where you do request a dose outside the criteria you will be required to provide a reason for the authoriser's consideration.

Scenario: Entering Dose Information

1. Enter the patient weight in kilograms.
   You may choose to calculate dose based on Ideal Body Weight Adjusted Dosing. If so select the option and enter the patient's height.

2. The system will allocate a product for the authorisation based on the allocation rules. You may choose a different product by selecting **Request a different product** and providing a reason. The decision to grant a different product rests with the authoriser.

3. Select from the list of available doses that you would like to prescribe. For each dose:

a. Enter the proposed dose per kilogram – if you propose a dose outside the criteria you will be required to enter a reason for dosing outside the criteria.

b. For repeating doses, set a frequency – if you propose a dose with a frequency outside the criteria you will be required to enter a reason for dosing outside the criteria.

c. Enter the approximate date required (the date that you wish this treatment to begin)
   The system will calculate the approximate end date and will alert you if the proposed course of treatment is longer than permitted in the criteria.

d. Enter any additional dosing notes that may be relevant to the authorisation decision.

4. Click **Save and Continue**

Rounding of Doses

The calculated total dose will always be rounded to a value that can be made up with the available presentations of the allocated or selected product.

Where a dose has been rounded up a reason is not required if the dose is greater than set out in the criteria.

A user may enter a value into the Total Dose field. Where the manually entered value is greater than the dose set out in the criteria plus the minimum rounding allowance a reason for dosing outside the criteria is required.

Alternate Scenario: Entering Dose Information for an exceptional use or unsupported conditions
This scenario is applicable where an exceptional use or unsupported condition was selected in Diagnosis and Criteria.

1. Enter the patient weight in kilograms.
   You may choose to calculate dose based on Ideal Body Weight Adjusted Dosing. If so select the option and enter the patient's height.

2. Select a preferred product.

3. Click **Add Dose.**

4. Enter a dose type (for example Loading Dose, Maintenance Dose, Induction Dose).

5. Enter the details of the dose that you are requesting.

6. Click **Save and Continue.**

You can add multiple doses (for example a Loading Dose and a Maintenance Dose) by clicking **Add Dose** again.

Submitting the Form

The final step in submitting the form requires you enter the name and phone number of the best contact for this request and to acknowledge a declaration.

Step 4 - Submission

To assist with the assessment of this request please enter a contact name and phone number for an authoriser to contact you if needed.

Contact Name [   ]

Contact Phone [   ]

Your request is ready for submission. Please review the request details and click 'Submit' to submit your request

☑ I acknowledge the governance and management arrangements for the appropriate supply and use of immunoglobulin products, funded under the national blood arrangements, and the provision of information required to support authorisation. To the best of my knowledge, the information provided in this form is true and correct.

I have explained to the patient (or parent/carer/guardian) and I believe that they are aware of and understand:

- the risks and benefits of treatment with immunoglobulin products and alternative treatments (where these exist),
- the national access conditions and governing requirements for the appropriate supply and use of immunoglobulin products
- under the national blood arrangements, including that immunoglobulin products may need to change from time to time
- (for patients requiring ongoing treatment only) the nature of ongoing monitoring and review and that access to product will cease if response to treatment does not demonstrate clinical benefit.

[Previous Step]   [Submit]

Scenario: Submitting the Authorisation Request Form

1.   Enter the name and phone number of the person who is the best contact should the authoriser need to discuss this request.
      In this UAT exercise please enter fictitious names and phone numbers.

2.   Read the declaration and tick to acknowledge the declaration.

3.   Click **Submit**

Your authorisation request will be submitted to the authoriser for assessment. A success message is displayed including a reference number for the request.

You can view your completed authorisation request by selecting Submitted requests in the Authorisation Request list.

After submitting an authorisation request, another UAT tester performing a role of an Authoriser will assess your request and the outcome of that assessment will be recorded in the system for you to view.

You can view a list of requests that you have submitted by selecting **My Requests** from the **Homepage**. The filter at the top of the page will allow you to see the status of your requests. To find out if any authoriser has begun assessment, filter the list by the status **In Assessment.**

I made a mistake and need to correct a form that I have submitted

If the authoriser has not yet started assessment on the request you can recall the request, make changes and re-submit.

To recall a request, select to **View** the submitted request in the Authorisation Request List and then choose Recall from the bottom of the form.

Viewing the Outcome of an Assessment

As part of this User Acceptance Testing exercise, transfusion medical staff at the Australian Red Cross Blood Service will also be undertaking User Acceptance Testing of the Assessment functionality. These users will assess and either Approve or Decline your request.

There are various ways that you can find out the outcome of assessment.

- You will receive a notification about the assessment in your BloodSTAR messages menu on the home page.
- If approved, the patient's authorisation will now appear on your My Patient's list (your home page).
- When you view the patient record, details of the current authorisation are displayed.
- On the patient record the authorisation request list, will have a link to the Authorisation Record.

Resubmitting a request that has been declined

If a medical officer submits a request which is declined by the authoriser because the submitted information was not sufficient for the authoriser to approve the request, the request may be resubmitted.

A request may only be submitted up to two months after the original request was declined.

Scenario: Resubmitting a declined request

1. Click **Home** to return to the Home Page

2. Select the **My Requests** tab

3. Select **View** on the declined Request from the Request List

4. Scroll to the bottom of the request the assessment outcome and click **Create Resubmission.**
    A new request is created containing all of the submitted information.

3. Update or add to the information in the request and submit in the same way as submitting the original request.

The Authorisation Record

For requests that are approved, an Authorisation record will be created by BloodSTAR.

The authorisation record is the place in BloodSTAR which displays authorisation status of a patient and details exactly what the patient is authorised for.

Note: In most places throughout BloodSTAR where an Authorisation Number is displayed you can click the link to display the authorisation record.

Patient Details

The patient details panel summarises the identifying details of the patient.

In the screen shot above that this patient has been entered to the system without an MRN. The system provides you with the opportunity to add one by clicking the link.

Authorisation Details

The authorisation details tab sets out for which medical condition and indication the patient is approved for immunoglobulin treatment, the dosing regimen, the authorisation end date and the Treatment arrangements (which facilities are involved in the treatment)

Treatment Plan

The Treatment plan sets out the planned treatment episodes as forecast by the system at the time of approval. Over the course of the authorisation the treatment plan will be updated to display the quantities of product dispensed for each treatment and planned dates will be updated in order to ensure that the approved interval between doses is maintained.

Editing an Authorisation Record

The ability to edit an authorisation record is tightly controlled as most attributes of an authorisation must be approved by an Authoriser.

The patient's medical condition, indication and dosing regimen cannot be changed without the submission of a new Initial Authorisation Request (for medical condition and indication) or dose change request (for dosing regimen). These requests must be submitted by a medical officer and approved by an authoriser. Once approved the authorisation record will reflect the change.

An authorisation record can be edited in order to update the Treatment Arrangements (Treating, Administering and Dispensing Facilities) or to transfer the care to another Treating Specialist.

Editing of an authorisation is limited to doctors and nurses working at the patient's current treating facility.

Scenario: Updating the Treatment Arrangements

1.   From the Authorisation Record select **Edit.**

2.   When the **Edit Authorisation** page is displayed select new Treating, Administering and/or dispensing facilities.

3.   Click **Save.**

The patient's treatment arrangements will be updated in the authorisation record.

This patient will no longer be displayed on the Authorisation Patients at the current facility. They will now appear on the Authorised Patients list for users logged in at the new Treatment facility.

Requesting a Change to an Authorised Dose

During the course of a patient's authorisation there may be cause to consider a change to the approved dosing regimen. Changes to the dosing regimen must be approved by the Authoriser, as such a Dose Change Request is required.

A dose Change Request is initiated from the Authorisation record. A prescriber must request a change to the dose that is to be changed and provide a rationale for the change. Similar to specifying a dose in the initial request the requested dose must either be within the constraints of the dosing criteria for the indication or must be supported with a reason for dosing outside the criteria.

Note: A change to an authorised dose should be requested where the change of dose is intended for the foreseeable future of the authorisation period.

Scenario: Requesting a Change to an Authorised Dose

1.   View the authorisation record for the patient's current treatment by clicking on the **Authorisation Number** in your **My Patients List** or the **Authorised Patients at this Facility** list in the Patients menu

2.   From Regimen field select **Request Change** against the dose for which you wish to request a change.
The Dose Change Request form is displayed with patient and authorisation details pre-populated

3.   Provide a reason for Dose Change.

4.   Complete the patient's current weight and dose specification.
Please see Setting up Doses for detailed steps in completing the Dose Form

5.   Add a Contact Name and number for the Authoriser to use if they need to discuss the request.

6.   Tick the declaration in the Submission panel and select **Submit.**

The Dose Change Request is sent to the Authoriser for approval. The outcome of the assessment is notified through BloodSTAR messages.

You can view your completed authorisation request by selecting Submitted requests in the Authorisation Request list

Requesting an additional dose

During the course of an authorisation there may be cause to request an **additional** dose such. For example an additional loading dose may be requested to raise the patient's Ig levels to a sufficient level early in treatment or for a small number of acute conditions the criteria permits an additional dose if a sufficient response has not been achieved by the first dose.

In this scenario, the prescriber should request an additional dose.

Note: *Only doses that permit an additional dose in the criteria can be requested as an additional dose.*

Scenario: Requesting an Additional Dose

1. View the authorisation record for the patient's current treatment

2. From Regimen field select **Request Additional Dose**. Note this option may not be available for all doses and all indications. Try *Guillain Barre Syndrome* as an example.

3. The **Additional Dose Request** form is displayed with patient and authorisation details pre-populated

4. Provide a reason for the additional dose.
   The criteria that must be met for the additional dose may be displayed. Your reason for the additional dose should address these criteria.

5. Complete the patient's current weight and dose specification.
   Please see Setting up Doses for detailed steps in completing the Dose Form

6. Tick the declaration in the Submission panel and select **Submit**

The Additional Dose Request is sent to the Authoriser for assessment.

You can view your completed authorisation request by selecting Submitted requests in the Authorisation Request list

Once your additional dose request has been assessed, the outcome will be notified through BloodSTAR Messages

Review and Continuing Treatment

At the conclusion of an authorisation review outcomes may be required to be submitted.

Knowing when a review is due
A prescriber will be notified via BloodSTAR Messages that a review is required. A message will be sent eight weeks prior to the end of the authorisation and again two weeks prior to the end of the authorisation (if a review has not yet been recorded).

In addition to receiving Review messages, a prescriber can view pending reviews for patients in their care by viewing the Pending Reviews tab on the homepage

Frequently Asked Questions

What if the prescriber does not log onto BloodSTAR?

Nursing staff and other medical officer's at the facility have access to the list of authorised patients at the facility. This list includes the Authorisation End Date and an alert for authorisations pending review. From here hospital staff can be aware of patients with pending reviews.

Recording a Review Outcome

<table>
<tr><td colspan="2">Scenario – recording a review outcome</td></tr>
<tr><td>1.</td><td>From the Authorisation Record select the Review Outcomes Tab</td></tr>
<tr><td>2.</td><td>From the Review Outcomes tab select Record Review.
The Review Outcome form is displayed with patient and authorisation details pre-populated.</td></tr>
<tr><td>3.</td><td>Enter the date of the review</td></tr>
<tr><td>4.</td><td>Select an option for who undertook the review</td></tr>
<tr><td>5.</td><td>Select the Review Criteria that applies to your patient's condition at the time of the review.
As you select criteria additional fields are displayed to support your claims. This follows a similar process to the Initial Authorisation Request.</td></tr>
<tr><td>6.</td><td>Complete the additional fields for supporting evidence.</td></tr>
<tr><td>7.</td><td>Select a Review Outcome from the list.</td></tr>
</table>

Requesting Continuing Treatment

Where a review is completed with a Review outcome of **Request extension of the authorisation period (continuing authorisation)** the review form will be submitted as a **Continuing Authorisation Request**.

To complete the Continuing Authorisation Request you must request the doses that you would like the patient to receive and then complete the declaration before submitting the request. Completing the dose form follows the same process as above for Specifying Requested Doses.

On submission of the Continuing Authorisation Request you will receive a success message with a reference number for the request.

I made a mistake and need to correct a form that I have submitted

If the authoriser has not yet started assessment on the request you can recall the request, make changes and re-submit.

To recall a request, select to **View** the submitted request in the Authorisation Request List and then choose Recall from the bottom of the form.

Ceasing Treatment

To cease treatment of an authorisation you must enter a review and select a Review Outcome of Cease Treatment. You will be prompted for a date on which treatment shall cease.

What's next?

Now take some time to explore the system and try out different scenarios. Your aim here is not to try to break the system (we have a team of functional testers with this responsibility) but rather to test that the system deals with real-world scenarios that are applicable to your work.

Don't forget to provide us with your feedback as you go and take a few minutes to complete this https://www.research.net/r/BloodSTAR-MedicalOfficerUAT.

Questions

To learn more about **BloodSTAR** visit the NBA website at www.blood.gov.au/bloodstar, contact support on 13 000 BLOOD (13 000 25663) or email support@blood.gov.au.

Thank you for your time