Rationalisation of capturing data for a participant's research journey 2

REASON WHY?

R&I currently use Excel spreadsheets ("Patient Logs") to record screening, recruitment and follow-up visit information about a participant's research journey at the Trust. The team also has access to a research Local Performance Management System (LPMS) called EDGE, which is a secure database intended to capture all research activity at the Trust. There is inconsistency within the team on the use of Excel Patient Logs and EDGE and there is a risk of duplication resulting in waste of resource. There is also a GDPR risk and difficulty in collating information for reporting purposes.

SMART AIM

S SPECIFIC **M** MEASUREABLE **A** ACHIEVABLE **R** RELEVANT **T** TIME-BOUND **AIM**

To rationalise the use of data capture systems by ensuring all new research projects are not duplicated by the 1st November 2023.

PLAN

A previous project identified that EDGE could provide 100% of the same functionality as the Excel Patient Logs but in different formats. EDGE is a secure, audited system with reporting capabilities. However, there were some concerns about using EDGE alone and data was being duplicated in Excel and EDGE for 70% of new research projects.

edge

After presenting this information to the team it was decided that we would trial the use of EDGE to collect information about a participant's research journey for all new research projects. We also wanted to generate ideas about how the team could be encouraged to use EDGE more frequently.

DO

A survey was circulated to ascertain how people felt about using the EDGE alone for all new research projects and themes collated, which were:

- **Lack of skills/training in using EDGE**
- **Lack of time to complete EDGE training**
- **Lack of confidence in the capabilities of EDGE**
- **Being unable to see the participant journey holistically and "at a glance"**

The 7 whys and Idea Sorting Priority Matrix was used to generate ideas about how the team could be encouraged to use EDGE more frequently and it was decided we would implement weekly "EDGE huddles"

A 6-month trial of using EDGE alone for all new research projects and implementing weekly "EDGE huddles" was undertaken, and data collected.

STUDY

Percentage of participant status* and appointment data for new research projects duplicated on EDGE and Excel
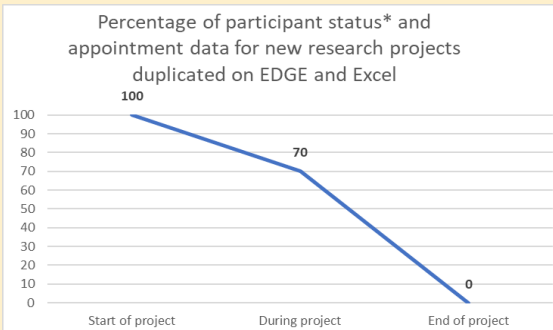
* Defined as pre-screened, approached, consented, screened, recruited, on treatment, on follow-up, completed or off study

Duplication of EDGE and Excel data for new research projects reduced from 100% at the start of the project to 70% during the project to 0% at the end of the project. All research projects had minimal or no follow-up appointments.

The main theme from the feedback collected at the end of the project was that the participant status and appointment functions in EDGE can be used without Excel for "simple" research projects, where there is minimal or no follow-up visits. However, the team still had a preference to use Excel or more "complex" research projects with several follow-up visits. They felt Excel provided a better overview of where all participants are in their research journey.

75% found the huddles very helpful or helpful, and 25% who didn't find them useful felt they weren't necessary to attend as they already had knowledge of the process.
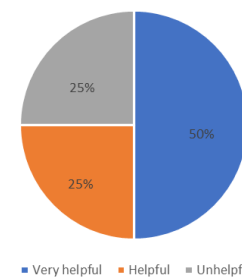
The main themes from the feedback were:

- Helped increase confidence in using EDGE
- Helped increase confidence in understanding the research pathway and requirements.
- Allocated time to problem solve.
- Good reminder to use EDGE.

How helpful are EDGE huddles?

- Very helpful 50%
- Helpful 25%
- Unhelpful 25%

ACT

We will **adopt** EDGE to enter participant status and appointment data for new studies where there is minimal or no follow-up. We will also **adopt** regular EDGE Huddles.

We will feedback current findings to EDGE and the WM:CRN Research Operational Group.

Our **next steps** will be to continue to collect data to find out how EDGE can be utilised to capture data about a participant's research journey for "complex" research projects.

We would also like to undertake further improvement projects to explore the use of EDGE screening logs, Forms, Calendars and Safety Reporting function to track a participant's research journey.