

AURORA Video Script and Survey Part 2 of 3

Modules covered:

- Initiate eDARF
- Module eDARF
- Header Module
- eDARF Search Module

OMB No.: 0925-0642

Expiration Date: 03/31/2023


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Initiate eDARF module


Select a new order from the Orders (Processed) dashboard card to initiate an eDARF.

Select a transferred order from the eDARFs (To be acknowledged) dashboard card to initiate an eDARF.


Training Module Script: Initiate eDARF (version 04, 10-DEC -2020)

Step	Time (min:sec) 00:00	Action on Screen	Narration
1	00:10	 The thumbnail shows a blue background with the text 'eDARF Initiation in AURORA' and a subtitle 'The dawn of a new era in NCI Pharmaceutical Management Branch agent inventory management'. At the bottom, it says 'NATIONAL CANCER INSTITUTE' and 'MMM 2020'.	<p>Welcome to this video tutorial on initiating electronic Drug Accountability Record Forms (eDARFs) in AURORA.</p> <p>This video will go over how to create new eDARFs in AURORA for PMB supplied agents.</p>
2	00:35	AURORA log in screen	You will need to initiate eDARFs whenever a new eDARF is needed for a new protocol, agent, strength, formulation, ordering investigator, or new patients for patient specific orders. When transitioning to AURORA for the first time, all eDARFs will need to be initiated.
3	01:00	<p>AURORA dashboard</p> <p>Highlight dashboard tiles</p> <p>Sign in as JLYNN</p>	<p>There are two common ways of initiating an eDARF in AURORA.</p> <p>One way is to initiate an eDARF from the Orders (Processed) dashboard tile for new and previously shipped orders from PMB.</p> <p>The other way is to initiate an eDARF from the eDARFs (To acknowledge) dashboard tile for approved transfer requests from another protocol or investigator.</p>
4	01:00	<p>Open “Orders (Processed)” dashboard tile</p> <p>SMATHEWS for “add dispensing area”</p> <p>JLYNN for eDARF already initiated</p>	<p>To initiate an eDARF from the Orders (Processed) dashboard tile, select either a new order just received from PMB or the most recent order already received from PMB with shipped status.</p> <p>Under the eDARF column for that order, click “initiate.”</p> <p>If this column displays “add dispensing area” instead, then you have not set up your dispensing areas and should follow the steps in the “Site Maintenance” video.</p> <p>If an eDARF has already been initiated, this column will display a link to the eDARF.</p>
5	01:15	Click the “initiate eDARF” and show the questions/answers	Once you click the “initiate” link, a new screen appears with additional questions. Please note that the eDARF header information at the top is prepopulated based on the order specific information.


Step	Time (min:sec) 00:00	Action on Screen	Narration
			<p>There are two Yes or No questions.</p> <p>The first question is “Have you recorded Order XYZ on any other DARF?” Answer Yes if you’ve already recorded the shipment receipt outside of AURORA. Answer No if you have not recorded the receipt yet.</p> <p>The second question is “Do you have any existing inventory for the protocol?”</p> <p>Answer Yes if you have some current inventory at your site for this eDARF. Answer No if your current inventory is zero.</p>
6	00:50	Select “No” to the first question and then show both “Yes” and “No” options to the second question	<p>Depending on the answers, additional fields will display that need to be completed. Hover over the “I” icons for more information for certain fields.</p> <p>Click on the Help button at the top right corner of the page for  by step instructions.</p> <p>Click save to initiate the eDARF and the balance forward and receipt information will be automatically recorded.</p>
7	00:30	Show the eDARFs (To acknowledge) dashboard tile	<p>The other way to initiate an eDARF is after PMB approves a transfer from another investigator or protocol and a new eDARF needs to be created.</p> <p>Select the appropriate transfer under the “eDARFs (To acknowledge)” tile with a Transfer From transaction type.</p>
8	00:20	Click the eDARF link and show the question/answer	<p>Only one question needs to be answered: “Do you have existing inventory for the protocol?” Once information is entered, click save to initiate the eDARF and the record the transfer.</p> <p>AURORA prepopulates the eDARF header based on the approved transfer information.</p>
9	00:15	Highlight the Transfers dashboard tile	Pending and denied transfers are located in the Transfers dashboard tile and are not available to initiate an eDARF. Refer to the “Transfers” video for more information.
10	01:00		<p>Some helpful hints are:</p> <ul style="list-style-type: none"> Collect your current inventory lot

Step	Time (min:sec) 00:00	Action on Screen	Narration
			<p>numbers and quantity information for each lot prior to initiating your eDARFs (Recall that AURORA security logs you off after 30 min of inactivity)</p> <ul style="list-style-type: none"> • Make sure information entered is accurate before saving as saving creates official records in the system • The inventory information you enter will be used by AURORA to help notify you of expiration notifications • The help button is available at the top right corner of the screen to give step by step instructions.
11	00:25	 <p>The image shows the National Cancer Institute logo, which includes the NIH logo and the text 'NATIONAL CANCER INSTITUTE'. Below the logo, the website addresses 'www.cancer.gov' and 'www.cancer.gov/espanol' are displayed.</p>	<p>Thank you for watching this video tutorial. Questions can be directed to the Pharmaceutical Management Branch, CTEP, NCI by calling (240) 276-6575 Monday through Friday from 8:30am to 4:30pm Eastern Time or by emailing PMBAAfterHours@mail.nih.gov at any time.</p>


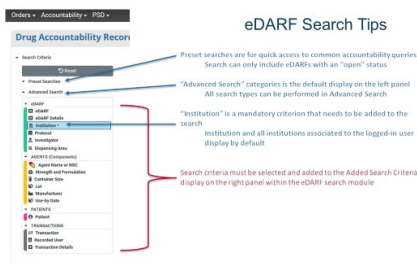
Training Module Script: eDARF Header (version 02, 18-DEC-2020)

Step	Time (min:sec) 00:00	Action on Screen	Narration
1	00:20	 The slide shows the title 'eDARF Header in AURORA' with a subtitle 'The dawn of a new era in NCI Pharmaceutical Management Branch agent inventory management'. At the bottom, it features the NIH logo and 'NATIONAL CANCER INSTITUTE' on the left, and 'DEC 2020' on the right.	Welcome to this video tutorial focusing on the eDARF header in AURORA. This video will review and highlight some new features and enhancements to the eDARF header area.
2	00:45	Sign into AURORA (JLYNN) Open eDARF from eDARF Favorites dashboard tile C-COLUMBUS-S1900A-007	In this tutorial we will review the eDARF header area for protocol specific and patient specific eDARFs. Open the eDARF of interest from the eDARF Favorites dashboard tile or eDARF search. Refer to the “eDARF search” video tutorial for additional information and helpful hints on this process. It is important that you select the correct eDARF for accountability.
3	01:30	“Open label” eDARF header	Let’s start with the protocol specific eDARF, which is used for open label studies. At the top of the header is the status of the Control Record eDARF, shown as “OPEN.” If the eDARF is no longer active (such as if the protocol is closed), use the “Close eDARF” button to inactivate the eDARF. The star icon next to the Control Record is yellow if the eDARF is added to the eDARF Favorites dashboard tile for quick access. The “Generate PDF” button allows you to generate a pdf of the eDARF for your files. The OMB form expiration date will be automatically updated and will display on the pdf at this time.
4	00:40		Right below the top line is the Notifications section. This section will only display if there are certain notifications related to this eDARF. In this example, a stock recovery letter was issued, and the link to the letter is provided. Other examples include protocol status changes, local destruction request status changes, and other errors and warnings.
5	00:20	Columbus header	Next is the eDARF information section which shows how the agent is supplied and the name

Step	Time (min:sec) 00:00	Action on Screen	Narration
			of the eDARF, which is a unique record.
6	00:20	<p>Process Workflow: eDARF Naming Convention</p> <p>C or S-NY158-EA9161-001</p> <ul style="list-style-type: none"> Where C stands for CONTROL; or where S stands for Satellite eDARFs NY158 - is for Shipping Institution EA9161 - is for Study Number And 001 - is the Sequential number of all eDARFs generated per given shipping site eDARF names are unique records <p><small>NATIONAL CANCER INSTITUTE</small></p>	The eDARF naming convention is based on the details of the record itself, where:
7	01:30	Columbus header	<p>The information here is auto-populated for PMB-supplied agents based on the information in the order placed with PMB when this eDARF was initiated. Most of the information cannot be changed after initiation. See the “Initiating eDARF” video tutorial for more information.</p> <p>The Local Protocol number field is optional and can be entered when initiating the eDARF to add the local site protocol number.</p> <p>The “manage dispensing area” button directs you to the site maintenance module. See the Management of dispensing areas and satellites video tutorial for more information.</p>
8	00:30	Open the Lot Information section	<p>The last section before the start of the eDARF transactions is the Lot Information cards. These cards summarize the different lots in your inventory based on transactions in the eDARF. The lot cards may include the last transaction and date, the manufacturer, the use by date with an icon that indicates if this is site entered or based on a PMB stock notification letter, and the balance.</p> <p>See the Stock Notifications video for more information.</p>
9	00:40	<p>Switch to a patient specific eDARF header</p> <p>C-COLUMBUS-So820-008</p>	<p>Patient specific eDARFs are used for blinded protocols and certain other studies. There is only one difference with the protocol specific eDARF headers.</p> <p>The difference is the addition of a “Patient” field which shows the CTEP Patient ID number. This is automatically populated based on the order from which the eDARF was initiated. This eDARF is only used for this patient.</p>
10	00:15	Highlight the help button	For step by step instructions or help with the

Step	Time (min:sec) 00:00	Action on Screen	Narration
			eDARF header information, please reference the help button at the top right corner of the screen.
11	00:25	 <p>The image shows a blue background with the National Cancer Institute (NCI) logo on the left, which includes a stylized eagle and the text 'NIH NATIONAL CANCER INSTITUTE'. Below the logo, the website addresses 'www.cancer.gov' and 'www.cancer.gov/espanol' are listed.</p>	<p>Thank you for watching this video tutorial. Questions can be directed to the Pharmaceutical Management Branch, CTEP, NCI by calling (240) 276-6575 Monday through Friday from 8:30am to 4:30pm Eastern Time or by emailing PMBAAfterHours@mail.nih.gov at any time.</p>


Training Module Script: eDARF Search (version 02, 07-JAN-2021)

Step	Time (min:sec) 00:00	Action on Screen	Narration
1		<p>Slide 1</p> 	<p>Welcome to this video tutorial focusing on the eDARF Search in AURORA. This video will review how to search for and view details of an eDARF.</p>
2		<p>Sign into AURORA as JLYNN Open eDARF Search from Accountability</p>	<p>The Accountability module allows you to search for existing eDARFs by clicking eDARF Search. This is one way of accessing eDARFs and is especially useful when there are many active records at your site. We'll discuss just some of ways you can use this powerful tool to support your site inventory management activities.</p>
3		<p>This can be accomplished using live capture and slide is not needed for display</p> <p>Slide 2</p> 	<p>Some general eDARF Search tips:</p> <ul style="list-style-type: none"> There are two different types of searches – Preset Searches and Advanced Search. Preset searches are for convenient access to common accountability queries <ul style="list-style-type: none"> The search can only include eDARFs with an “open” status “Advanced Search” criteria is the default display on the left panel <ul style="list-style-type: none"> All search types can be performed in Advanced Search “Institution” is a mandatory criterion that needs to be added to every search <ul style="list-style-type: none"> Institution and all institutions associated to the logged-in user display by default Search criteria must be selected and added to the Added Search Criteria display on the right panel within the eDARF search module. Choose these criteria in the order they are presented for best results. Click Reset and enter new search criteria
4			<p>To use a preset search, expand and click on one of the Preset Searches, either Threshold Balance Search or Expiration Search.</p>
5			<p>The Threshold Balance Search allows you to search for eDARFs with agents that are over or under a certain balance. It contains the</p>

Step	Time (min:sec) 00:00	Action on Screen	Narration
			Search Criteria Details: Institution, Agent Name or NSC, and eDARF Details.
6		Institution: Columbus Pembrolizumab less than 4 vials both control and satellite	<p>In this example, we have selected pembrolizumab NSC 776864 with a threshold value of < 4 vials in both control and satellite records. We click Search to start the query.</p> <p>From the eDARF search grid, you can see the eDARFs that have low inventory and may require an agent order. You can also export the search results to Excel or PDF, filter the results to locate a specific eDARF, and view details for an eDARF by clicking the link in the eDARF Number column.</p>
7			<p>Next, we'll review the other Preset Search, Expiration Search. It allows you to search for eDARFs that will meet the PMB-specified use by date within a specified timeframe. It contains the Search Criteria Details: Institution, eDARF Details, and Use-by Date.</p>
8		Institution Default date range Control and satellite records Default date range	<p>The Institution and eDARF Details (Status and Type) function are already described in the Threshold Balance Search. Use-by Date contains the following fields:</p> <ul style="list-style-type: none"> • Use-by Date: Enter the date or click the calendar icon to select the date range. The default range is 90 days starting from today's date. • Expiration Date Added By: PMB is selected by default and cannot be changed or updated. <p>Once you have selected all criteria, click Search and the results will provide you a list of eDARFs with agents that have use-by dates in the specified date range. In this example, there are no PMB-determined use-by dates within the next 90 days.</p>
9		Slide 2	<p>We've covered the Preset Searches. Now we'll discuss the Advanced Search function which is used to query AURORA for a variety of accountability activities. A few examples will be demonstrated shortly, but there are many other search possibilities, with more common examples that include locating:</p> <ul style="list-style-type: none"> • Inventory on hand by agent, protocol, dispensing area or investigator • All expiring agent inventory by date range • All agent/strength on hand in case of urgent need for agent transfer

Step	Time (min:sec) 00:00	Action on Screen	Narration
			<ul style="list-style-type: none"> • Agents in a specific dispensing area that experienced temperature excursion • All inventory for an ordering investigator who has left the site • All inventory on hand when control dispensing area is re-locating and all agents need to be transferred
10			Select your search criteria from the Search Criteria Categories: eDARF, Agents (Components), Patients, and Transactions.
11			The first Search Criteria is eDARF. When you click on eDARF, you can multi-select any eDARFs from the list of values or use the search field to enter the criteria if it is known.
12		<p>Institution eDARF details: control awaiting acknowledgement</p> <p>Click on second one down to see transfer acknowledgment:</p> <p>C-COLUMBUS-A031501-003</p>	Under the eDARF category, we can search for control eDARFs that are awaiting acknowledgement and generate a list of eDARFs that require site action. In this example, we find 8 records in the search results. Refer to other videos in the training series that focus on different transaction types, such as agent transfer.
13			<p>The fourth Search Criteria is Protocol with the following fields:</p> <ul style="list-style-type: none"> • Protocol Letter Issued: Use this toggle button to indicate if a protocol letter was issued for an eDARF. • Protocol ID: Use the search field to locate a specific protocol ID.
14		Investigator: Inara Montes eDARF details: control	Lastly, you can click on Investigator and Dispensing Area to multi-select any criteria from the list of values or use the search field. In this example, Dr. Montes has left the institution and you need to request agent transfers for any remaining inventory. We can find two control eDARFs with Dr. Montes as the ordering investigator.
15			Next, we'll discuss the Search Criteria Category: Agents (Components). Searching under Agents (Components) contains the Search Criteria: Agent Name or NSC, Strength and Formulation, Container Size, Lot, Manufacturer, and Use-by Date.

Step	Time (min:sec) 00:00	Action on Screen	Narration
16		Institution Agent name: trametinib Use-by date: stock notification YES Result: EA6134-006 Open eDARF to see notification banner and lot cards with PMB assigned use-by date	You can click on the Search Criteria to multi-select any criteria from the list of values or use the search field to enter the criteria if it is known. The Use-by-Date is the only criteria with additional fields: <ul style="list-style-type: none"> • Expiration Date Added By: Click a button to indicate who added the expiration date. • Stock Notification Issued: Use this toggle button to indicate if stock notification was issued for the eDARF In this example, we located an eDARF where a stock notification has been issued for expiring trametinib inventory.
17		Example?	Next, we'll discuss the Search Criteria Category: Patient with the following fields: <ul style="list-style-type: none"> • Patient Return: Use this toggle button to indicate if a patient return was recorded on the eDARF. • Return Date: Enter the date as previously discussed • Patient ID: Use the search field to locate a specific patient ID number. This search functionality may be helpful when preparing a destruction report that contains patient returns within a specified timeframe.
18			The last Search Criteria Category under Advanced Search is Transactions. Searching under Transactions contains the Search Criteria Details: Transaction, Recorded User, and Transaction Details.
19		Agent name: pembro Transaction dates: 10/01/2020-today Received from NCI transaction type	The first Search Criteria is Transaction with the following fields: <ul style="list-style-type: none"> • Transaction Date: Enter the date as previously discussed • Awaiting Acknowledgment: as previously discussed • Transaction Types: Use the scroll bar to locate a specific transaction type or use the search field. As an example, you can use the advanced search functions across multiple categories to find every pembrolizumab shipment that was received from the NCI within the specified timeframe.
20		Institution Transaction dates 10/1/2020-today Type: inventory verification Recorded user: J Lynn	Within the transaction category, you can multi-select criteria to identify which records had inventory verification performed by a specific recorded user during the specified timeframe.

Step	Time (min:sec) 00:00	Action on Screen	Narration
21			<p>The last Search Criteria is Transaction Details with the following multi-select fields:</p> <ul style="list-style-type: none"> • Local Destruction: Select a Request Status, set the Destruction Date range, or use search field to locate a specific record. • Transfer From: Select Institution, Investigator, or Protocol to narrow the data lists from which to select your search criteria or use the search field. • Transfer To: Select a Transaction Status and select either Institution, Investigator, or Protocol to narrow the data lists from which to select your search criteria or use the search field. • Received from NCI: Use the scroll bar to locate a specific order number or use the search field.
22		Highlight the help button	For step by step instructions or help with the eDARF Search information, please reference the help button at the top right corner of the screen.
23		 <p>The image shows the National Cancer Institute logo, which includes a stylized eagle and the text 'NIH NATIONAL CANCER INSTITUTE'. Below the logo, the website addresses 'www.cancer.gov' and 'www.cancer.gov/espanol' are displayed.</p>	<p>Thank you for watching this video tutorial. Questions can be directed to the Pharmaceutical Management Branch, CTEP, NCI by calling (240) 276-6575 Monday through Friday from 8:30am to 4:30pm Eastern Time or by emailing PMBAAfterHours@mail.nih.gov at any time.</p>

1. Were you able to initiate an eDARF from the Orders (Processed) dashboard card and after a transfer from the eDARFs (To be acknowledged) dashboard card?

- ☐ Yes to both
- ☐ Yes but only from one of the dashboard cards
- ☐ No to both

2. Does having the eDARF header pre-populate for you save you time?

- ☐ Yes a little time
- ☐ Yes a lot of time
- ☐ It is about the same amount of time.
- ☐ No it takes more time

3. Were the helpful hints slide and help icon in AURORA useful in the initiate eDARF process?

- ☐ Yes very helpful
- ☐ Yes somewhat helpful
- ☐ No not helpful
- ☐ More information or instructions should be included.

eDARF header module

Please review the eDARF header and answer the following questions:

4. How useful do you find the following features?

	Extremely useful	Somewhat useful	Neutral	Somewhat not useful	Extremely not useful
Star feature for saving eDARF as favorites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Notifications section at the top of each eDARF	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Free text local protocol number field	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Manage dispensing areas button	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lot information cards	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

eDARF search module

Perform eDARF searches to find a particular eDARF.

Perform a preset search.

5. Please rate the ease of use for searching eDARFs.

- ☐ Easy to use
- ☐ Somewhat easy to use
- ☐ Neutral
- ☐ Somewhat hard to use
- ☐ Hard to use

6. How useful did you find the following features?

	Extremely useful	Somewhat useful	Neutral	Somewhat not useful	Extremely not useful
Preset Searches - Threshold Balance Search and Expiration Search	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advanced Searches - Search Criteria Categories: eDARF, Agents (Components), Patients, and Transactions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Extra questions

If there are any issues during testing, please contact pmbafterhours@mail.nih.gov (<mailto:pmbafterhours@mail.nih.gov>).

7. What is your current DARF system?

- ☐ Paper DARFs from NCI or other sponsors
- ☐ Commercial electronic DARF systems (e.g. Velos, Vestigo)
- ☐ Institution created electronic DARF system
- ☐ Combination



Other

8. What features would you like to see in the future in these modules?

