

AURORA Video Script and Survey Part 3 of 3

Modules covered:

- Transporting to Satellite Dispensing Areas Module
- Agent Dispensing Module
- Patient Returns Module
- Local Destruction Module
- Agent Transfers Module
- Bulk Agent Transfers Module
- Inventory Verification Module

OMB No.: 0925-0642


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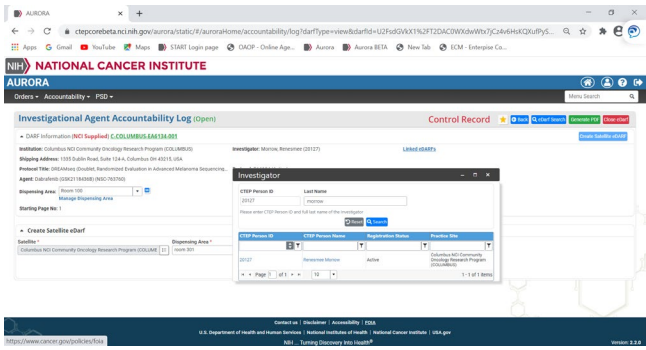
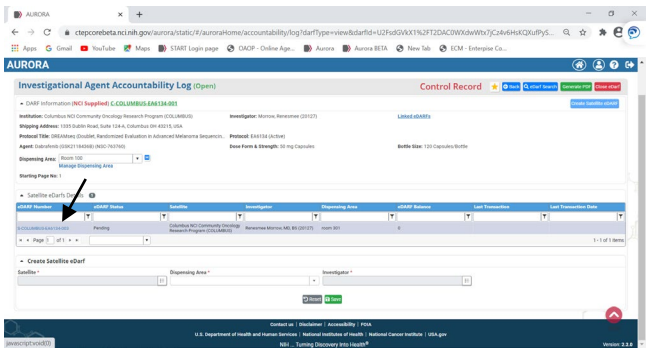
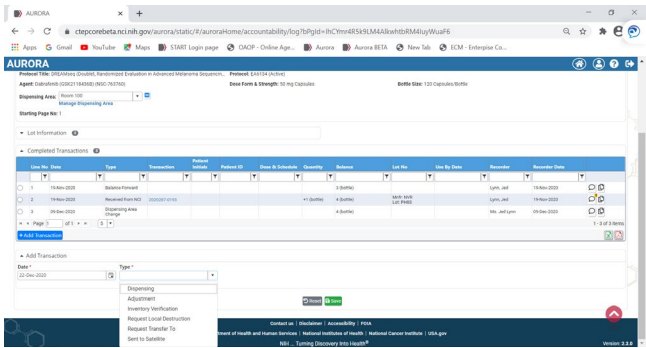
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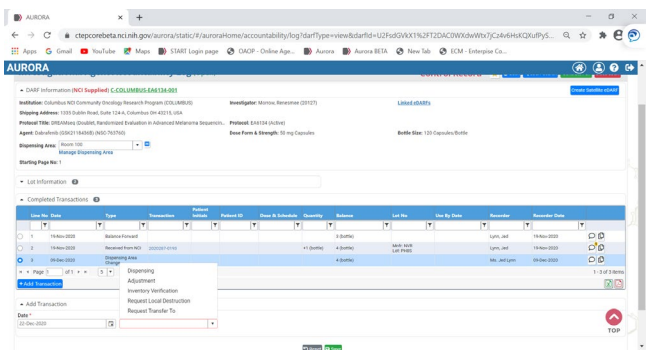

Transporting to satellite dispensing area Module

Transport study agent from control to satellite dispensing area.


Training Module Script: Transporting to satellites (version 01, DD-MMM-2020)

Step	Time (min:sec) 00:00	Action on Screen	Narration
1			Welcome to the AURORA training video on Agent Transporting to Satellites. The agent transport transaction is used to record in an eDARF the movement of agents from a control dispensing area to a satellite dispensing area and back. In Aurora, the transactions are called “Sent to Satellite” and “Return to Control.”
2		User ID: JLYNN C-Columbus- A031501	To record agent transport to a satellite dispensing area, find the control eDARF. Refer to the Aurora training video about eDARF Search for ways to find a specific eDARF.
3			Two things need to be in place prior to sending agent to a satellite. A satellite dispensing area needs to be set up in Site Maintenance and a satellite eDARF needs to exist.
4		Point to create satellite button on control eDARF	<p>Creation of satellite dispensing areas is discussed in the Site Maintenance training video.</p> <p>The “Create Satellite eDARF” link will not display on the control eDARF if a satellite dispensing area has not yet been created.</p>
5		Toggle back to A031501 control eDARF	If there is a satellite dispensing area already set up, but not no satellite eDARF has been set up, the “Send to satellite” transaction type will not be available in the list of values. To create a satellite eDARF, the designee at the control dispensing area can click


Step	Time (min:sec) 00:00	Action on Screen	Narration
			the Create satellite eDARF button located in the upper right-hand corner of the Control Record.
6			<p>The next step is to select a satellite, the satellite dispensing area and the investigator.</p> <p>[pause]</p>
7		 <p>Create satellite eDARF, but do not save.</p>	<p>Once saved, this creates a satellite eDARF in pending status. No agent transport can occur until the satellite eDARF is initiated.</p> <p>A satellite designee can open the satellite eDARF and complete the eDARF initiation process.</p> <p>The profile that is shown is for a control designee who has access to both control and satellite dispensing eDARFs.</p>
8		 <p>Go back to control eDARF for EA6134.</p>	<p>Once the status of the satellite eDARF is open, a designee at the control site goes to the control record to begin the transport transaction of the agent.</p>

Step	Time (min:sec) 00:00	Action on Screen	Narration
9			In this example, there is balance available on the the control eDARF for transport. To transport the agent to the satellite, click on the Add Transaction button and select “Send to Satellite” from the list of values.
10		Use linked eDARFs to toggle to satellite record and acknowledge transport	<p>Choose the satellite location, manufacturer, lot and quantity of the supply that is being transported and save.</p> <p>The next step is for a satellite designee to acknowledge the agent transport.</p> <p>Once the satellite record is located, a satellite designee can click on the Accept button and enter the received date. The supply cannot be used until this step is completed.</p>
11		Initiate Return to Control transaction from the satellite eDARF	When it is time to transport inventory back to the control dispensing area, use the “Return to Control” transaction to initiate the process from the satellite record. The transaction must be acknowledged on the control eDARF to complete the agent transport.
12			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.


Training Module Script: Agent Dispensing in AURORA (version final)


Step	Time (min:sec) 00:00	Action on Screen	Narration
1		<p>Instruction:</p> 	<p>Welcome to this video tutorial on patient dispensing in AURORA, the PMB's centralized agent inventory management application.</p> <p>This presentation will demonstrate how patient dispensing is performed on the eDARF for both protocol-specific and patient-specific PMB-supplied agents used for NCI-supported clinical trials. It will also demonstrate how agent units can be converted on the eDARF.</p>
2		<p>Instruction: log in as J Lynn Use eDARF search to find C-Columbus-E3A06-009</p> <p>Instruction: hover over bottle size</p>	<p>To record agent dispensing for a patient receiving a protocol-specific agent, we find the E3A06 control eDARF as our example. Notice that the inventory unit is tracked as 100-count bottles, which is consistent with the way the NCI distributes lenalidomide. We'll come back to this later.</p> <p>[slow]</p>
3		Instruction: go to dispensing transaction	Click on the Add transaction and choose "Dispensing" as the transaction type. The dispensing fields open for completion.
4		Instruction: open patient ID fields and manually add patient ID: 123456 and Patient Initials: AB	If the patient ID is not available in the list, click on the "Manually Add Patient" button and enter the patient details.
5		Instruction: Enter 5 mg daily and choose Lot A2828A	Next enter a free text dose and schedule. Choose the manufacturer and lot number from the available inventory.
6		Instruction:	<p>Based on the patient's dose and schedule, we want to dispense the exact quantity of 28 capsules, which is consistent with the dispensing requirement for lenalidomide.</p> <p>However, the units on the eDARF are tracked as bottles, not capsules. When we choose quantity of "28" and unit of "capsules," Aurora will ask us to confirm that we are changing the dispensing method from bottles to capsules.</p> <p>There may be other times when tracking</p>

Step	Time (min:sec) 00:00	Action on Screen	Narration
			inventory by the smallest unit is desired or required. Units can be converted during dispensing, transfer or local destruction transactions.
7		Instruction: enter comment “Converted to capsules for exact quantity per protocol”	Once the change in agent units is confirmed, agent inventory will display as capsules instead of bottles. Units can be converted back and forth as needed. A comment is required when agent units are converted.
8		Instruction: hover over use-by date field	Use-by date fields are optional, but if a date was previously entered by site designees, it will display here. When PMB issues the stock notification for this agent and lot, this use-by date field will populate the official expiration date.
9		Instruction: hover over Attach files field and comments field	Pertinent documents related to this specific agent dispensing transaction can be uploaded using the Attach files function. Free text can be entered in the Comments field. These fields are generally not required and are for your convenience. Click the save button. Keep in mind that uploaded files and comments become part of the accountability record. They can be viewed by clicking on the comment or attachment icons at the end of the relevant line within the accountability grid.
10		Instruction: C-Columbus-So820-008 under J Lynn	For an example of dispensing patient-specific agent supply, we go to the eDARF for So820, which is a blinded trial using eflornithine or placebo.
11		Instruction: hover over patient details on eDARF header	Patient-specific agent supplies are distributed by NCI specifically for a study patient. Notice that the patient initials and study ID are already populated on the eDARF header.
12		Instruction: Dispensing transaction	Click on the Add transactions button and choose “Dispensing.”

Step	Time (min:sec) 00:00	Action on Screen	Narration
13		Instruction: 1 tablet twice daily 2 bottles No expiration date	Complete the dispensing fields as previously discussed.
14		Instruction: Point to use-by date field	<p>The Use-by Date field is optional and will display a date if PMB has entered the expiration date in Aurora for this agent supply.</p> <p>For calculating a use-by date for patient-specific supplies, refer to the Frequently Asked Question (FAQ) document.</p>
15		 <p>The image shows a blue background with the National Cancer Institute (NCI) 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 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 PMBAfterHours@mail.nih.gov at any time.</p>


Training Module Script: Managing Patient Returns (version final)

Step	Time (min:sec) 00:00	Action on Screen	Narration
1	00:15	<p>Instruction: Display intro slide</p> 	<p>Welcome to the AURORA video tutorial about Managing Patient Returns.</p> <p>The management of patient returns in AURORA is a tool that allows sites to document both patient returns and destruction. The patient returns module is for the convenience of clinical trial sites and is not considered part of the accountability records.</p>
2	00:30	<p>Instruction: Sign in as JLYNN site user. Locate C-COLUMBUS-E3A06-009</p>	<p>When a site has received patient returns, the appropriate eDARF is located by either using eDARF search or the eDARF favorites dashboard card.</p> <p>If using the eDARF search, the “dispensing” transaction type can be used as part of the search. The results can include both Control and Satellite eDARFs.</p>
3	00:30	<p>Instruction: Click on the Patient Return tool on the dispensing line of the eDARF.</p>	<p>In this example, find the correct “dispensing” transaction line for this patient return. Scroll all the way to the right to find the Patient Returns icon at the end that looks like a portrait. Hover over the icon and it will display the words Patient Returns. Click on the icon.</p>
4	00:30	<p>Instruction: Move through the patient returns data fields.</p>	<p>The patient returns module will open at the bottom of the screen. The Quantity Returned and Returned Date must be entered. The RX# and Destruction Date are optional fields for site use.</p> <p>Only enter a quantity of zero if the patient returns an empty container. A comment must be entered to explain the quantity of zero.</p>
5	00:20	<p>Instruction: Click the save button</p>	<p>Click the save button. Once saved, a number will appear in a yellow circle next to the Patient Returns icon to display the # of entries recorded. Multiple entries can be recorded under one dispense if necessary.</p>
6	00:30		<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</p>


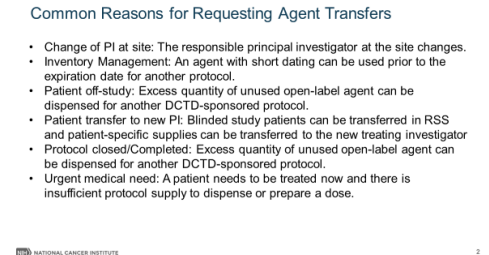
Step	Time (min:sec) 00:00	Action on Screen	Narration
		 <p>The image shows the National Cancer Institute logo, which includes a circular emblem with a caduceus and the text 'NIH NATIONAL CANCER INSTITUTE'. Below the logo, the website addresses 'www.cancer.gov' and 'www.cancer.gov/espanol' are displayed.</p>	<p>PMBAfterHours@mail.nih.gov at any time.</p>

Training Module Script: Local Destruction (version final)


<i>Step</i>	<i>Time (min:sec) 00:00</i>	<i>Action on Screen</i>	<i>Narration</i>
1		Instruction: Main title screen	<p>Welcome to the AURORA video tutorial about the Local Destruction module.</p> <p>The local destruction transaction is the process of requesting approval for local destruction and documenting local destruction on the eDARF after inventory is destroyed.</p>
2		<p>Instruction: Sign in as JLYNN.</p> <p>Select eDARF C-COLUMBUS-S1900A-007</p>	<p>Begin by identifying the supply that requires local destruction. Most commonly, you would use local destruction to destroy supplies that are expired, supplies that are determined to be unsuitable or when a protocol closes to treatment and supplies cannot be transferred.</p> <p>In this example the Notifications section shows a warning that one lot is expired. This information also appears in the Lot Information section.</p> <p>Remember that inventory at satellite locations must be returned to the control location before requesting local destruction. All inventory that needs to be destroyed should be requested at the same time.</p>
3		<p>Instruction: Stay at eDARF C-COLUMBUS-S1900A-007</p> <p>Click “Add transaction” – “Request Local Destruction”</p>	<p>Request local destruction approval from PMB by selecting “Add Transaction” and choosing “Request Local Destruction” on the appropriate eDARF.</p>
4		<p>Instruction: Move across the fields.</p> <p>Choose lot YXNC (expired lot)</p>	<p>Select the Manufacturer/Lot No from a list of values and enter the quantity. The Use-By Date is not editable and will display any PMB issued use-by dates. The Reason field is required and must be selected from a drop-down menu. The Requester Phone and Requester Email are automatically displayed based on the signed in user and will be the contact for PMB in case of questions. The file attachment and comment fields are optional.</p> <p>Click save to submit the request. [pause]</p>
5		Instruction: Show the Pending/Denied Transactions section.	<p>Once submitted, this request will appear in the Pending/Denied Transactions section of the accountability log as well as on the</p>

Step	Time (min:sec) 00:00	Action on Screen	Narration
			<p>dashboard tile. The inventory involved in the request are held in reserve on the eDARF and no other transactions can be initiated on this supply. Prior to PMB review, this entry can still be deleted by clicking on the “trash can” icon.</p> <p>[pause]</p>
6		<p>Instruction: Show the Local Destructions dashboard tile</p> <p>Select C-COLUMBUS-EA6134-006 – approved Local Destruction</p>	<p>After the local destruction request is approved or denied, the status will update and can be viewed from the Local Destructions dashboard tile. Click on the return number or the eDARF name to open the eDARF.</p> <p>A pop-up window appears to notify you that there are transactions that need to be acknowledged. In the Pending/Denied Transactions section, click the Accept button for the appropriate request to continue the process.</p>
7		<p>Instruction: C-COLUMBUS-EA6134-006 (already has a completed transaction and denied transaction)</p>	<p>If the request was denied, you must accept the transaction and record the accepted date to complete the process. The denied request will remain in the Pending/Denied Transactions section. In the Completed Transaction section of the eDARF, the quantity will no longer be held in reserve.</p> <p>If the request was approved, accept the transaction when you are ready to destroy your inventory and enter the destruction date. The last step is to click save to complete the local destruction transaction.</p> <p>Please remember that no local destruction should occur prior to PMB approval.</p>
8			<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 PMBAfterHours@mail.nih.gov at any time.</p>



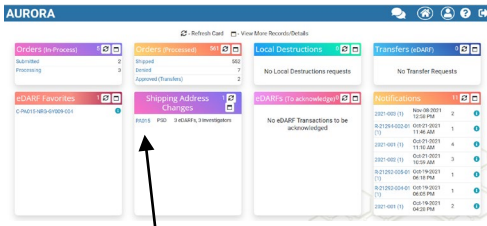
Training Module Script: Agent Transfers (Final)

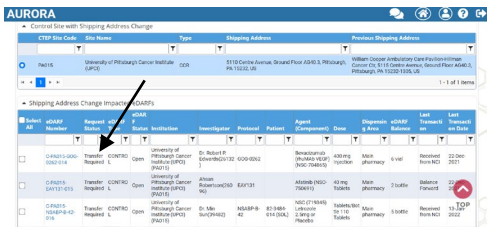
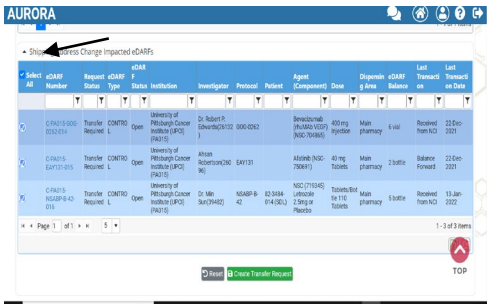
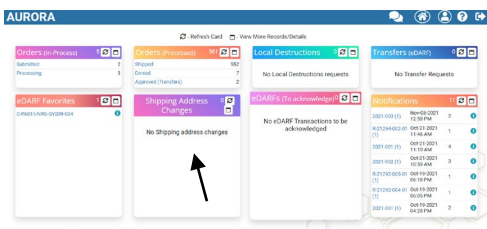
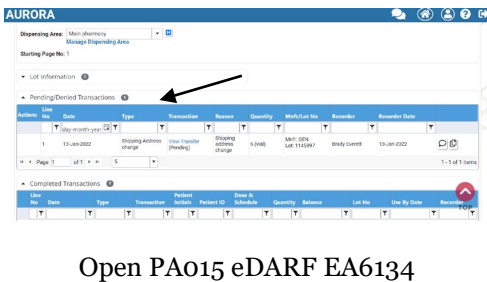
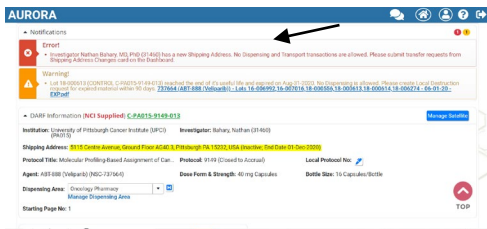
Step	Time (min:sec) 00:00	Action on Screen	Narration
1		<p>Instruction: slide 1</p> 	<p>Welcome to the Aurora video tutorial about the agent transfer process.</p> <p>When possible, PMB-supplied agents may be transferred from a DCTD-sponsored protocol to another DCTD- sponsored protocol for the same investigator or between eligible investigators within the same institution.</p>
2		<p>Instruction: slide 2</p> <p>Common Reasons for Requesting Agent Transfers</p> <ul style="list-style-type: none"> • Change of PI at site: The responsible principal investigator at the site changes. • Inventory Management: An agent with short dating can be used prior to the expiration date for another protocol. • Patient off-study: Excess quantity of unused open-label agent can be dispensed for another DCTD-sponsored protocol. • Patient transfer to new PI: Blinded study patients can be transferred in RSS and patient-specific supplies can be transferred to the new treating investigator • Protocol closed/Completed: Excess quantity of unused open-label agent can be dispensed for another DCTD-sponsored protocol. • Urgent medical need: A patient needs to be treated now and there is insufficient protocol supply to dispense or prepare a dose. 	<p>Common reasons for requesting agent transfers are:</p> <p>[Read the slide.]</p> <p>For control pharmacy or dispensing area relocations, please refer to the “Bulk Transfers in Aurora” video in the training series.</p>
3		<p>Instruction:</p> <p>Login as jlynn</p> <p>Aurora home page transitioning to eDARF.</p>	<p>The steps for agent transfer process are very similar as before; however, the transfer process occurs within Aurora and is fully electronic. We will discuss differences in this video.</p>
4		<p>Instruction:</p> <p>Select DARF -C-Columbus-S1418-010 To A031501-003</p>	<p>Select the eDARF from which agent will be transferred. In this example, we want to transfer pembrolizumab from one protocol to another since we have an urgent medical need.</p>
5		<p>Instruction:</p> <p>Click “Add Transaction” button.</p> <ul style="list-style-type: none"> - Type = Request Transfer To 	<p>Request agent transfer approval from PMB by selecting “Add Transaction” and choosing “Request Transfer To.”</p>
6		<p>Instruction:</p> <p>Enter the required information:</p> <ul style="list-style-type: none"> - Investigator = Morrow/20127 - Protocol = A031501 - Manufacturer/Lot No = S028160 - Quantity = 1 - Reason = Urgent Medical Need <p>Click the green “save” button.</p>	<p>[slow down]</p> <p>Complete all mandatory fields for the investigator, protocol, institution, date, manufacturer/lot, quantity and reason, designated by a red asterisk in the “Add Request Transfer to Transaction” box.</p> <p>Click “Save.”</p> <p>[pause]</p>

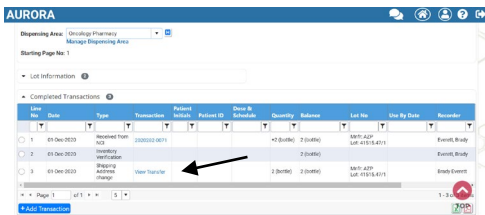
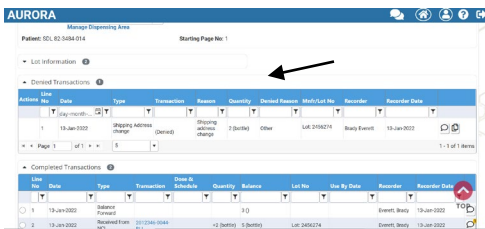
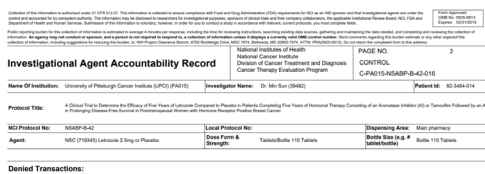

Step	Time (min:sec) 00:00	Action on Screen	Narration
7		<p>Instruction:</p> <p>Point to the “Pending/Denied Transactions” section of the DARF</p>	<p>Once submitted, the completed Transfer request appears in the “Pending/Denied Transactions” accountability log of the eDARF.</p> <p>The inventory involved in the request are held in reserve on the eDARF and no other transactions can be initiated on this supply. Prior to PMB review, this entry can still be deleted by clicking on the “trash can” icon.</p>
8		<p>Instruction:</p> <p>Go back to the Home page and point to the Transfers eDARF on the eDARFs tile.</p> <p>See “pending” request See approved requests</p> <p>Hover then open up then click the “View More Details” button</p>	<p>To easily track transfer transactions awaiting PMB review, you can either perform an eDARF search by transaction type or view the dashboard Transfers (eDARF) tile.</p> <p>Details about all transfer requests can be viewed by clicking the “View More Details” button in the upper right-hand corner of the tile.</p>
9		<p>Instruction:</p> <p>Hover over approved transfers in eDARFs (to acknowledge) tile</p>	<p>Once the request is reviewed, the transaction information on the Transfers tile will change from “Pending” to either “Approved” or “Denied.”</p> <p>The eDARF is added to the “eDARFs (To acknowledge)” tile and is noted by “Transfer To” action type.</p>
10		<p>Instruction:</p> <p>Use C-Columbus-S1418-010</p>	<p>The PMB decision must be acknowledged regardless of disposition. When the Transfer to eDARF is opened, a “Transactions to Acknowledge” box with all unacknowledged transactions for that eDARF appear at the top of the eDARF. This box is informational only.</p> <p>Scroll down to the Denied/Pending Transactions box, select the appropriate transaction and click the “Accept” button to acknowledge the PMB decision and save. Accepted transactions will move to the “Completed Transactions” box, while denied transactions will remain in the “Pending/Denied Transactions” box.</p> <p>Note that the accountability record will have a transaction type called “Transfer To.” [pause]</p>
11		C-COLUMBUS-S1418-005	<p>In this example, notice the denied transfer request that needs to be acknowledged. Click on the Accept button to complete the</p>

Step	Time (min:sec) 00:00	Action on Screen	Narration
			transaction and remove inventory from reserve status.
12		<p>Instruction:</p> <p>Return to the Home page and show the Transfers tile.</p>	<p>Once acknowledged, the approved transaction will be removed from the “Transfers” tile.</p> <p>The eDARF receiving the transfer will now appear on the eDARFs (To acknowledge) tile. The words “Transfer From” are to the right of the eDARF ID.</p> <p>If the receiving eDARF does not yet exist in Aurora, answer the system-generated questions to set up the eDARF to complete the agent transfer. Refer to the “eDARF Initiation in Aurora” video in the training series.</p>
13		<p>Instruction:</p> <p>eDARF C-Columbus-A031501-003</p>	<p>The final step in the transfer process is for the site designees to accept the transfer transaction on the receiving eDARF.</p> <p>When the eDARF is opened, a “Transactions to Acknowledge” box with all unacknowledged transactions for that eDARF appears at the top of the eDARF. This box is informational only.</p> <p>Scroll down to the Denied/Pending Transactions box, select the appropriate transaction and click the “Accept” button to acknowledge the transaction and save. The transaction will move to the Completed Transactions box. Note that you will see a transaction type called “Transfer from.” This supply can now be dispensed.</p>
14		<p>Instruction: slide 3</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>


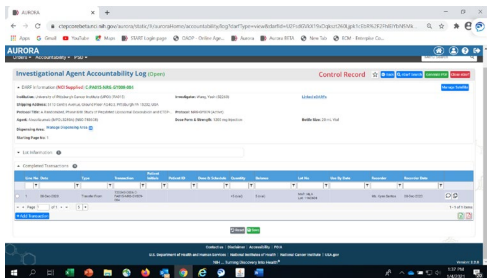
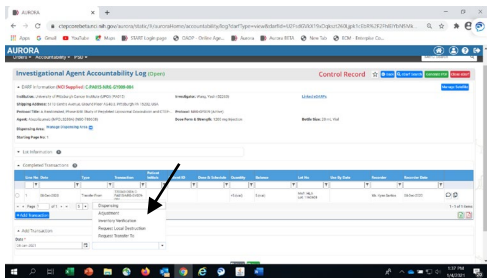
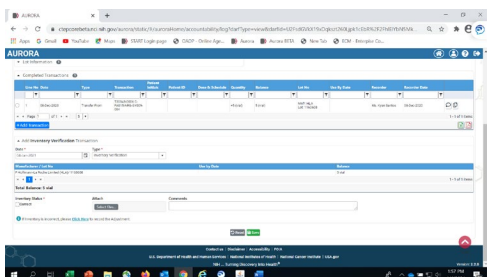
Training Module Script: Bulk Agent Transfers (final)

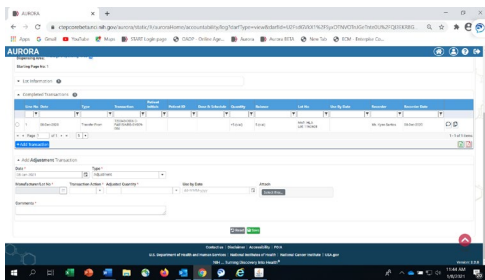

Step	Time (min:sec) 00:00	Action on Screen	Narration
1			<p>Welcome to the AURORA video tutorial about performing Bulk Agent Transfer transactions.</p> <p>The bulk agent transfer transaction process allows a site to submit multiple agent transfer requests simultaneously, and upon PMB approval, have multiple agent transfer transaction approvals recorded simultaneously on the control eDARF. These bulk transfer transactions will occur in cases when the Control Dispensing Area is moving from one physical address location to another.</p>
2			<p>The bulk agent transfer process involves multiple steps that can be accomplished quickly from beginning to end and minimize the burden for the site. For this reason, the address update on the Primary Shipping Designee (PSD) worksheet should only occur at the time of the Control Dispensing Area relocation.</p>
3		<p>Overview of Bulk Agent Transfers</p> 	<ul style="list-style-type: none"> Step 1: Control Dispensing Area submits a shipping address update via the AURORA PSD worksheet module Step 2: PMB approves the shipping address change and is alerted to address updates involving the street address, city, state or zip code Step 3: PMB determines if agent transfers are required as a result of the address update Step 4: Control Dispensing Area is alerted to submit agent transfer requests. A single request is submitted for all agent inventory at one time. Step 5: PMB reviews and approves/denies agent transfer request Step 6: Control Dispensing Area eDARFs are automatically updated with the transfer approvals. No additional site action is required.
4		 <p>PA015 User: BEVERETT</p>	<p>When the PSD address change includes the street address, city, or zip code for the Control Dispensing Area and PMB determines submission of transfer requests is required, the Shipping Address Changes card on the dashboard will indicate the number of affected open eDARFs with an inventory balance and the number of investigators on those eDARFs for the PSD site code.</p> <p>Click on the site code to view the site code address change and eDARFs that require transfer request submission.</p>

Step	Time (min:sec) 00:00	Action on Screen	Narration
5			The PSD site code, site name, updated PSD address and previous PSD address are displayed with the list of affected eDARFs that require transfer request submission.
6			Check “Select All” to select all eDARFs that require a transfer request submission. eDARFs may be selected individually if the remaining inventory will not be transferred; for example, if the remaining agent inventory balance will be destroyed locally prior to the site’s relocation. Once the affected eDARFs are selected, click the Create Transfer Request button to submit the transfer requests to PMB.
7			If all affected eDARF Transfer Requests are submitted, the Shipping Address Changes card on the dashboard will be cleared.
8			The submitted transfer request will display in the Pending/Denied Transactions grid on the individual eDARF while the request is being reviewed by PMB. The transfer details for the shipping address change are viewed by clicking on the view transfer link.
9			If an investigator’s shipping address has changed and PMB determines transfer requests must be submitted, no dispensing or transport transactions will be allowed on the eDARF until the transfer request is submitted and approved for the new location. An error message will display under the Notifications banner.

Step	Time (min:sec) 00:00	Action on Screen	Narration
10		 <p>Open PA015 eDARF EA6134 <u>C-PA015-EA6134-017</u></p>	<p>PMB will receive, review and approve or deny the transfer requests. Approved transfers for a change in address will automatically be recorded in the completed transaction grid on each eDARF. No further action is required by the site.</p> <p>Bulk transfer details for the shipping address change are viewed by clicking on the view transfer link. The shipping address in the eDARF header will update to the new shipping address and a history button will display the old shipping address.</p>
11		 <p>Open C-PA015-9149-013</p>	<p>Denied transfers will be recorded in the denied transactions grid on the eDARF with the denial reason.</p> <p>Keep in mind that final disposition of the remaining inventory still needs to be reconciled prior to relocation of the Control Dispensing Area (e.g. if the remaining inventory is to be destroyed locally).</p>
12		<u>Open C-PA015-EAY131-018</u>	<p>The shipping address in the eDARF header for open eDARFs with an inventory balance of zero will update to the new shipping address automatically once the address change is approved. No further action is required by the site. A history button will display next to the address to view the old shipping address.</p>
13		 <p><u>Open C-PA015-EA6134-017 pdf</u></p>	<p>Approved transfers for a shipping address change will be denoted on the eDARF pdf report by the start of a new page with the shipping address change transfer documented as the first line number.</p> <p>[pause]</p>
14			<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 PMBAfterHours@mail.nih.gov at any time.</p>

Training Module Script: Transaction – Inventory Verification (version final, JAN-2021)

Step	Time (min:sec) 00:00	Action on Screen	Narration
1			<p>Welcome to the AURORA video tutorial about Inventory Verification.</p> <p>The inventory verification transaction is the process of reconciling physical inventory with inventory on the eDARF and then resolving any discrepancies using the adjustment transaction.</p>
2		<p>User ID: BEVERETT (PSD; UPCI)</p> 	<p>To begin, go to the appropriate eDARF, shown here for atezolizumab in study NRG-GY009. Inventory verification can be documented on both Control and Satellite eDARFs.</p>
3			<p>Let's say today, we are going through our inventory and want to verify the balance of our physical inventory against the agent balance on the eDARF. We see that the eDARF shows a balance of 4 vials.</p> <p>We click on Add Transaction button and select Inventory Verification from the list of values.</p>
4			<p>Once the inventory verification transaction fields open, we can verify the total balance, manufacturer and agent lot number with the physical inventory. If the inventories match, the inventory status "correct" button can be checked and the transaction saved.</p>
5			<p>If the total balance of the physical inventory and the eDARF inventory do not match, try to resolve the discrepancy. Some steps to resolve a discrepancy include checking that:</p> <ul style="list-style-type: none"> All quarantined supply that may have

Step	Time (min:sec) 00:00	Action on Screen	Narration
		<p>Common causes of discrepancies Check that:</p> <ol style="list-style-type: none"> 1. All quarantined supply that may have been set aside for evaluation of suitability is accounted for 2. All dispensing transactions have been saved in Aurora 3. Inventory in all agent dispensing areas, including satellites has been accounted for 4. All NCI shipments have been recorded 5. All agent transfers and returns have been acknowledged 6. All agent transport transactions have been acknowledged 7. No patient returns have been added back to the balance <p>NATIONAL CANCER INSTITUTE</p>	<p>been set aside for evaluation of suitability is accounted for</p> <ul style="list-style-type: none"> • All dispensing transactions have been saved in Aurora • Inventory in all agent dispensing areas, including satellites has been accounted for • All NCI shipments have been recorded • All agent transfers and returns have been acknowledged • All agent transport transactions have been acknowledged • No patient returns have been added back to the balance
6			<p>If an inventory adjustment is required, click on the link below to record the adjustment transaction. To adjust the quantity, complete the required fields:</p> <ul style="list-style-type: none"> • Manufacturer/Lot No.: select from the list of values • Transaction Action: Add or Deduct • Adjusted Quantity: enter the quantity that was added or deducted • Comments: a comment is required <p>If the adjustment was due to a dispensing error, you need to email the medication error report to PMB for review and follow up. Attach your note to file or other documentation for this eDARF by uploading it using the Attach/Select files function.</p>
7			<p>After adjusting for the inventory discrepancy, verify the physical inventory and balance on the eDARF. Check the correct box under the inventory status and save to finalize the transaction.</p>
8			<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 add a satellite dispensing area (if you are a designee at the control site)?

☐ Yes

☐ No

2. If you're a satellite designee at the satellite location, were you able to initiate an eDARF at the satellite location?

☐ Yes

☐ No

3. Please rate the ease of use for transporting agent from Control eDARF to Satellite eDARF:

	Easy to use	Somewhat easy to use	Neutral	Somewhat hard to use	Hard to use
Select "send to satellite" transaction from the list of values	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Select satellite location, manufacturer, lot, and quantity of agent when entering a transport transaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accept and receive agent as a satellite designee	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Agent Dispensing Module

Choose an eDARF already initiated in Aurora and perform an agent dispensing transaction.

4. Please rate the ease of use for dispensing agent to a study patient:

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

5. How useful do you find the following features?

	Extremely useful	Somewhat useful	Neutral	Somewhat not useful	Extremely not useful
Ability to upload a file	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to enter a site use-by date for an agent lot	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to convert agent units from container to dosage unit or vice versa	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
If patient details cannot be selected/found in the system, is the ability to manually add useful?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Patient returns Module

Find a dispense transaction and document a patient return.

6. Were you able to document a patient return?

☐ Yes

☐ No

☐

Other

Local destruction Module

Open an active eDARF and enter a local destruction transaction of one unit.
Acknowledge an approved or denied transaction.

7. Please rate the ease of entering a local destruction transaction request:

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

8. Please rate the ease of acknowledging an approved or denied local destruction request:

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

Transfers Module

Create an agent transfer between two separate eDARFs.

Cancel a pending transfer request.

Acknowledge an approved or denied transfer request. (Contact PMB to approve/deny a transfer request in order to complete this step.)

9. How easy was it to perform the following functions?

	Easy to use	Somewhat easy to use	Neutral	Somewhat hard to use	Hard to use
Transfer agent from one eDARF to another	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cancelling a pending transfer request	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Acknowledging an approved or denied transfer request	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Bulk transfers for shipping address changes Module

Open the PSD (Primary Shipping Designee) worksheet from the toolbar. If one exists, change the shipping street address, city, state or zip code and save the changes. If a PSD worksheet does not exist, complete the fields for a new PSD worksheet and submit the request to PMB.

10. Please rate the ease of updating the PSD address, city, state, or zip code:

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

11. If PMB approves the address change during the testing period and the bulk transfer transaction process can be completed, how useful did you find the following features?

	Extremely useful	Somewhat useful	Neutral	Somewhat not useful	Extremely not useful
Ability to update a site address in real time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability of PMB to determine if bulk transfers are needed for an address update	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability of Aurora to identify agent inventory on eDARFs that are affected by a site relocation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to manage agent inventory that may or may not be relocated when PMB determines bulk transfers are needed	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to acknowledge bulk transfer transactions on the pending grid of eDARFs with agent inventory	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Inventory verification Module

Select an eDARF and reconcile the physical inventory with inventory on the eDARF.
Resolve any discrepancies using the adjustment transaction.

12. Please rate the ease of use of the following features:

	Easy to use	Somewhat easy to use	Neutral	Somewhat hard to use	Hard to use
Ability to acknowledge that agent inventory balance is correct on the eDARF (matches physical inventory)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Ability to perform an inventory adjustment from the Inventory Verification screen when there are discrepancies that were not otherwise resolved	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Extra question

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

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



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