European Reference Networks

SHARE.CARE.CURE.

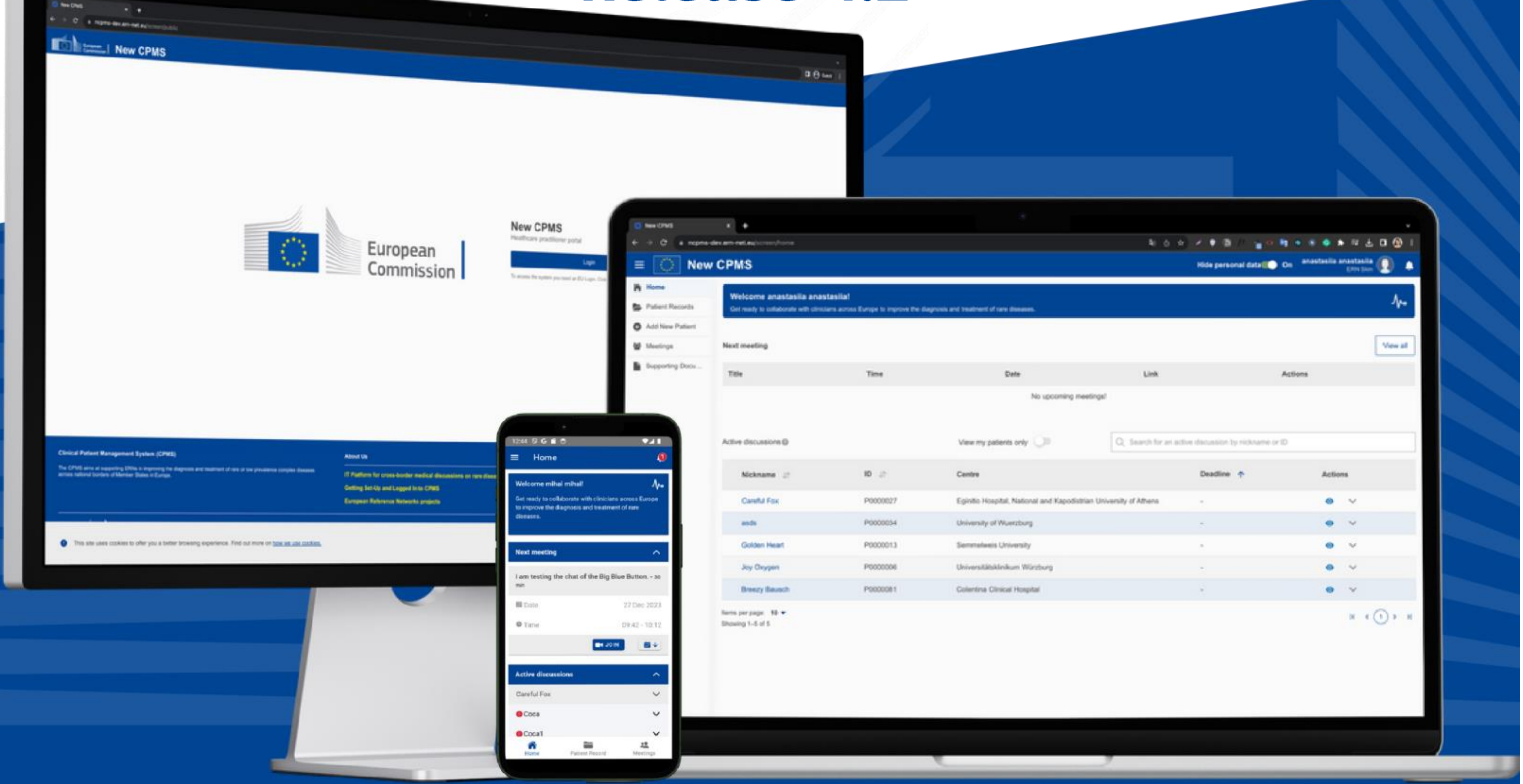
CPMS 2.0

Clinical Patient Management System

Your platform for cross-border clinical discussions on rare diseases

Reference Manual – Care

Release 4.2



European Commission | CPMS 2.0

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CHAPTER I

Introduction

Welcome to the Clinical Patient Management System (CPMS 2.0)

This reference manual is designed to assist healthcare professionals in navigating and effectively utilizing CPMS 2.0. It will help you understand all the details that make CPMS 2.0 a cutting-edge tool for improving the diagnosis and treatment of rare diseases.

Use this reference when you want to better understand all the possibilities of the tool, or you don't remember how a specific feature works. Use the available quick user guides if you just need a quick introduction or to quickly start using the main features of CPMS 2.0

Why is CPMS 2.0 right for you?

CPMS 2.0 is a versatile platform that adapts seamlessly to various user interfaces and workflows. It's designed to accommodate unstructured clinical cases, allowing for the inclusion of free text descriptions, slides, and other unstructured data, alongside structured data using coding systems.

The platform supports both synchronous interactions (audio, video, screen sharing) and asynchronous written communication. CPMS 2.0 offers two interfaces: a desktop interface for comprehensive clinical work and a mobile interface for simple, informal discussions and managing invitations/notifications.

Please note that CPMS 2.0 is a clinical platform exclusively for healthcare professionals and should not be accessed by patients.

Differences between CPMS and CPMS 2.0

CPMS 2.0 is a patient-centric platform designed to facilitate collaboration among clinicians from different European Reference Networks (ERNs). The key improvements over the previous version include:

- **Streamlined Discussions**: More organized and efficient communication between clinicians.
- **Enhanced File Sharing**: Direct upload of files and medical records, eliminating the need for external tools.
- **Simplified Sign-up**: A quicker and easier onboarding process using EU Login, eliminating the need for central authorizations.

System Requirements

The web user interface of CPMS 2.0 runs over any modern browser. For better results, before launching CPMS 2.0, ensure your system meets the following requirements:

Platform	Version	Release Date	Download Link
Google Chrome (Windows/macOS)	132.0.6834.110	January 22, 2025	https://www.google.com/chrome
Mozilla Firefox (Windows/macOS)	135.0	February 4, 2025	https://www.mozilla.org/en-US/firefox/new
Microsoft Edge (Windows/macOS)	133.0.3065.51	January 6, 2025	https://www.microsoft.com/en-us/edge/download?form=MA13FJ
Safari (macOS)	18.3	January 27, 2025	https://www.apple.com/safari

Note: Safari on Windows is not currently supported.

Screen Resolution and Zoom Settings

CPMS 2.0 may appear differently on various screens due to varying resolutions, text sizes, and personal preferences. To optimize your viewing experience, we recommend setting your browser's zoom level to around 80%. However, the ideal zoom level is ultimately a personal choice.

To adjust your browser's zoom level, follow these simple steps:

Google Chrome, Mozilla Firefox, and Microsoft Edge:

1. Click the three dots icon in the top right corner of your browser.
2. Select "Zoom."
3. Choose your preferred zoom percentage or use the "+" and "-" buttons to adjust.
4. Alternatively, use keyboard shortcuts:
   - Zoom in: Ctrl+Plus (Windows/Linux/Chrome OS), ⌘+Plus (Mac)
   - Zoom out: Ctrl+Minus (Windows/Linux/Chrome OS), ⌘+Minus (Mac)

Apple Safari:

1. Click "View" in the top menu bar.

2. Select "Zoom In" or "Zoom Out."
3. Or, use the keyboard shortcut: ⌘+Plus to zoom in, ⌘+Minus to zoom out.

By adjusting your browser's zoom level, you can tailor your CPMS 2.0 experience to your specific needs and preferences.

Overcoming Access Challenges

CPMS works seamlessly in most hospital IT environments. If you're encountering difficulties accessing CPMS 2.0 due to hospital IT infrastructure or firewall restrictions, follow these steps:

1. **Identify the Issue**: If you receive security warnings or access restrictions, it's likely due to your hospital's network security measures.
2. **Contact IT Support**: Reach out to your hospital's IT department to inform them about the access issue with CPMS 2.0 and provide the URL for review.
3. **Whitelist CPMS 2.0**: Request that your IT team whitelist CPMS 2.0, marking it as a trusted site within the hospital's network to prevent future access problems.

By following these steps, you should be able to resolve any access issues and gain seamless access to CPMS 2.0

Contact Information for Support

For any issues, questions, or assistance while using CPMS 2.0, our dedicated support team is here to help! Contact them via email: SANTE-ERN-CPMS-ITSUPPORT@ec.europa.eu.

Our support team strives to provide timely and efficient assistance to ensure a smooth and productive experience with CPMS 2.0.

CHAPTER II

System Vocabulary

This chapter defines key terms and concepts used in CPMS 2.0. While some terms retain their previous meanings, others have evolved, and new concepts have been introduced.

ERN: European Reference Networks (ERNs) are virtual networks involving healthcare providers across Europe. They aim to facilitate discussion on complex or rare diseases and conditions that require highly specialized treatment, and concentrated knowledge and resources (source: https://health.ec.europa.eu/european-reference-networks/overview_en);

CPMS 2.0: Clinical Patient Management System. IT Platform for cross-border medical discussions on rare diseases;

CPMS 2.0 CARE app: this is the system module dedicated to CARE and used by clinicians, assistants, and helpdesk. The menu available in the CARE app are Home, patient records, Meetings and supporting documents;

CPMS 2.0 ADMIN app: this is the system module dedicated to ADMIN tasks and used by ERN admin, DG SANTE Policy, and DG SANTE support.

Healthcare provider: means any legal person or any other entity legally providing healthcare on the territory of a Member State. It is usually an institution where healthcare is given to patients;

Healthcare professional: means a medical doctor, nurse, dental practitioner, midwife, pharmacist, etc., within the meaning of Directive 2005/36/EC, or any another professional exercising activities in the healthcare sector which are restricted to a regulated profession as defined in Article 3(1)(a) of Directive 2005/36/EC, or a person considered to be a health professional according to the legislation of the Member State of treatment. The HP is usually the person who meets patients and reports for the ERN;

ERN clinician: user role in CPMS 2.0 CARE app corresponding to a Healthcare professional member of an ERN, that is available to participate to patient’s discussions, meetings, and chat to share expertise;

ERN admin: user role in CPMS 2.0 ADMIN app. ERN administrators is responsible for validating user's accesses within their own ERNs. They have also access to reporting and can manage groups of experts;

Helpdesk: user role in CPMS 2.0 CARE. Helpdesk members can support ERN clinicians and lead after patients are created by providing operational support to the discussion or meetings. They can also edit the lead in the case the lead is not active anymore, to pursue the collaboration related to the patient. They can also edit the thematic area of the patients registered in their ERN and manage meetings hosted by users from their ERN. Exceptionally, they can act "on behalf" of a clinician from the same HCP, if appointed as assistants/ stand-ins;

Limited non-ERN member: user role in CPMS 2.0 CARE. Clinician who is not part of any of the 24 ERN and who is invited to the system to share their expertise and collaborate with the ERN experts in the context of patient's medical discussions and meetings;

Non-ERN member: user role in CPMS 2.0 CARE. Clinician who is not part of any of the 24 ERN and who is referring patients to the European Reference Networks. This user can create patient and act as lead, seeking advice from the ERN members;

Assistant: user role in CPMS 2.0 CARE dedicated to Medical/Personal Assistants who cannot perform patient-related actions in the system by their own (except meetings & chat), as long as they have not been appointed by a clinician to act on his/her behalf. Clinician can only appoint an assistant from their hospital as "stand-in". Once appointed, assistants will be able to perform the same actions as the clinicians they are appointed by. All action assistants are executing in the system will be marked as "on behalf of < clinician name>";

Standin: this is the action and the consequence of appointing an assistant to a clinician. The assistant will act on behalf of the clinician, and every action executed by the assistant will be marked by "on behalf of < clinician name>" to reflect that the assistant is stand in/acting on behalf of a clinician;

Patient record: All patient information necessary for experts to provide clinical advice. The patient record is constituted of patient identifying data and patient medical data. Patient's file and patient's discussions are also part of the patient's record;

Identifying data: personal data that allow direct identification of the data subject. In CPMS 2.0, the following identifying data is captured at the moment of the creation of the patient record. This data will only be visible by the user having created the patient, the lead and their eventual stand-in. The DPOs will also have access to those data if they are instructed by the patient to exercise their GDPR rights;

Nickname: the name of the patient displayed in the system. It shall not permit the identification of the patient. In CPMS 2.0 a nickname is automatically proposed by the system. The user can edit the proposed nickname by either automatically generating another nickname, by replacing it by a nickname of his/her choice. In that last case, there is button “validate” that will control that the nickname does not exist yet;

Treatment country: The country of the hospital where the patient is being treated at;

Lead: The healthcare professional who is responsible for the patient in the system. It is usually the person who brought the patient into the system;

Thematic area and sub-thematic area: The specific medical specialty or disease category that is the focus of collaboration and expertise in the Network. These areas vary per ERN and can be categorized as individual treatment or disease areas;

Chat: One-to-one discussion between 2 users of CPMS 2.0 (CPMS Care and/or Admin), outside patient context;

Discussions: discussion between 2 or more experts, invited to collaborate and share their expertise as participant of a patient record;

Active discussion: Discussion that is open/ongoing;

Discussion topic: discussion purpose/reason entered by the lead (or stand-in) to start a discussion with the participants of a patient record. It is a free text field which may contain details about the patient and their medical history;

Member: user invited as participant of the patient record and of the related discussions;

History: timeline of the discussion. It indicates when a discussion is opened, closed, and give access the closed discussion details including to the outcome document when a discussion is closed;

File investigation date: Date of the investigation (exam, lab results…);

Outcome: Document automatically generated by the system when the lead or stand-in closes a discussion by typing the summary comment. This document is available from the History tab of the patient record. It contains information such as the patient id, the patient creation date, the ERN where the patient is discussed, the thematic/sub thematic areas of the patient, the experts involved in the discussion, their profession , the topic of the discussion and the concluding comment;

Group: ERN admins have the possibility to create and manage groups of experts (ERN clinicians, limited/non-ERN clinicians, assistants, helpdesks) within their ERN and cross-ERN, when the group is composed of experts from different ERNs. Once created, users from the CARE app will be able to invite to a patient record or to a meeting all the members of the group at once, without having to select the experts one by one;

Clinical focus: Field present in "My account" page. This field is generated by the system based on the information the user entered in the fields thematic area, sub-thematic area and in the free text zone where user is invited to describe in own words the specific clinical or research focus, for which the user feels competent to give expert advice. Network members and non-ERN members users of the system can access to these details when searching for an expert to add as participant to a patient record, to invite to a meeting or to include in a chat;

Notifications. There are 2 types of notifications: email and in-app notifications.

Email notifications are per default sent to the email address related to the EU log in account. If user indicates a secondary email address in user's account settings, then email notifications will be sent only to the secondary email address.

In-app notifications are only displayed in the system and when the user is logged in, they are visible from the bell displayed on the top right part of the system.

Patient consent forms: users creating patients in the system must ensure that they have captured consent from their patient. Providing a GDPR compliant patient consent form is the responsibility of the hospital. Example templates of patient consent forms are available in all EU official languages from the supporting documentation section;

GDPR compliance: CPMS 2.0 is GDPR compliant for both patient and user's perspective. In the CPMS 2.0 platform GDPR rights can be clustered in three categories, depending on the way they are addressed:

- Right to be informed ;
- Right to access, right to rectification, right to erasure and right to data portability;
- Right to restrict processing, right to object and right to withdraw consent;

These rights can be addressed by 2 instances: the Data Protection Officer (DPO) of a hospital and the DPO of the European Commission. No automated decision making or profiling is done in the platform.

Privacy Policy: Every user must be aware of the Privacy Policy before using CPMS 2.0.

Withdraw of user consent: Users have the right to withdraw their consent, in such a case they will be inactivated and won't have access to the system anymore.

CHAPTER III

User Roles

This chapter defines the user roles available in CPMS 2.0. The user role is a key architectural feature of CPMS 2.0 and allows for the correct handling of rights and permissions:

- Users can perform actions in the CPMS 2.0 as per their role
- Permissions are handled at role level

Persona	App Roles	Care	Admin	App Role Description
Clinician	ERN Clinician	Yes	-	Clinicians working for healthcare providers/hospitals that are part of the European Reference Networks; Can have 1 or multiple "hats" in CPMS 2.0 - Patient lead, Regular participant, Standin for another clinician
Clinician – Guest	Non-ERN Clinician	Yes	-	Clinicians working for healthcare providers/ hospitals that are not yet part of the European Reference Networks but from countries where the board of members states allow experts to be invited to share their expertise and contribute to discussions. Expected to have only 1 "hat" in CPMS 2.0 - Regular participant to discussion/meetings
Clinician – Guest	Limited non-ERN Clinician	Yes	-	Clinicians working for healthcare providers / hospitals that are not yet part of the European Reference Networks but from countries where the board of members states allow experts to be invited to share their expertise and contribute to discussions Can have 1 or multiple "hats" in CPMS 2.0 - Patient lead, Regular participant

Persona	App Roles	Care	Admin	App Role Description
Assistant	Assistant	Yes	-	Medical/Personal Assistants, supporting ERN clinicians from the same hospital to perform their application activities at patient level once assigned to another user as "stand-ins"
Assistant	Helpdesk	Yes	-	ERN designated users, assisting all users in their ERN to do the needed work at patient level; can be added as "stand-ins" on special occasions
Admin	ERN Admin	-	Yes	ERN designated persons, in charge to support with users' management, reporting and groups management in their ERN
Admin	DG Sante Support	-	Yes	DG Sante support users, acting as delegates of Policy Unit cross - ERN, to support with users' management and reporting
Admin	Policy Unit	-	Yes	CPMS 2.0 admin "power user", acting cross -ERN, to support with users' management and reporting
Hospital Manager, Hospital nominees	Hospital Reporter	-	Yes	See/evaluate the global activity of their hospital for all ERNs where the hospital is involved.
Ministry of Health of Austria	Member State	-	Yes	Has a view of the involvement of the different hospitals of the country in ERNs
Hospital DPO/Legal rep of HCP X	DPO Hospital	Yes	-	Performs GDPR actions for patients in their HCP
Hospital DPO/ Legal rep of HCP X	DPO Commission	-	Yes	Performs GDPR actions for patients in their HCP

Notes:

1. **Single Role per User**: normally users have only one role per user interface (UI). For example:
    - An ERN clinician should only have access to the Care UI.
    - A support user should only have access to the Admin UI.

    An ERN coordinator may have access to both the Care UI (as a clinician) and the Admin UI (as an ERN admin).

2. **Combined Permissions**: when a user has multiple roles, their combined permissions will be granted. Currently, only two combinations are supported:
    - ERN Clinician (Care) + ERN Admin (Admin)
    - Helpdesk (Care) + ERN Admin (Admin)

CHAPTER IV

System Reference

This chapter provides a comprehensive overview of all CPMS 2.0 functionalities for clinicians. To enhance readability, we've organized the information in a question-and-answer format, categorized by high-level areas and/or common tasks.

A. EU Login

1. What is EU Login?

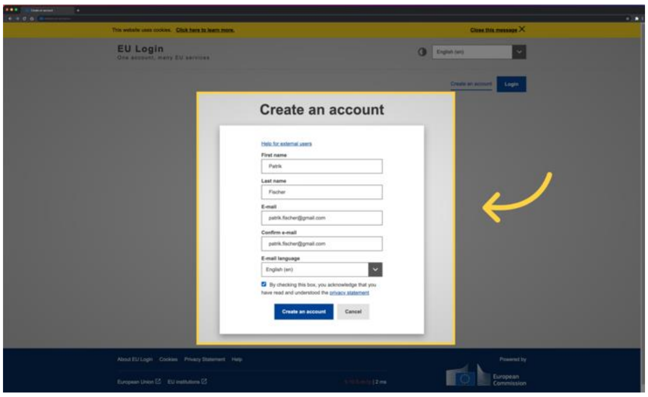
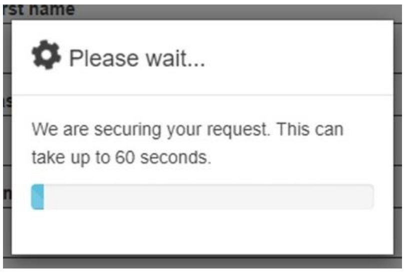
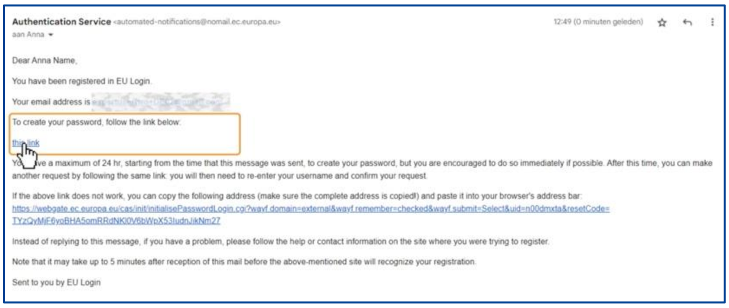
The EU Login authentication service (previously ECAS) is a point for user authentication to a wide range of Commission information systems. If you already have an ECAS account, you don't have to create a new EU Login account. In EU Login, your credentials and personal data remain unchanged. You can still access the same services and applications as before. You just need to use your e-mail address for logging in. Only one mobile device can be linked to one EU Login account.

Every time you want to use a website that requires EU Login authentication, you will automatically be transferred to the EU Login page, where you will be asked to enter your username and password.

2. How to create your EU Login?

Accessing the Clinical Patient Management System (CPMS 2.0) requires creating an EU Login. Follow these step-by-step instructions to set up your EU Login:

Step 1	Go to the EU Login registration page by navigating to https://webgate.ec.europa.eu/cas/eim/external/register.cgi.
Step 2	To create a new account, click on the Create an account hyperlink.

<table>
<tr><td>Step 3</td><td>Fill in the required personal information, including your email address, full name, and other necessary details.

</td></tr>
<tr><td>Step 4</td><td>A notification displays, informing you that the request is ongoing.

</td></tr>
<tr><td>Step 5</td><td>After providing your email address, you will receive a verification email. Open the email and click on the provided link to verify your account.

</td></tr>
<tr><td>Step 6</td><td>Set up security questions to enhance the security of your EU Login account.</td></tr>
<tr><td>Step 7</td><td>Follow the on-screen instructions to complete the registration process. Once done, you will have successfully created your EU Login.</td></tr>
</table>

To access more detailed information, kindly visit the following webpage: https://wikis.ec.europa.eu/display/NAITDOC/EU+Login+-+European+Commission+Authentication+Service

3. How do I reset my password in CPMS 2.0?

Password management is handled through the EU login system. To reset your password, visit the EU login page and follow the password recovery process. Once your EU login password is reset, it will automatically reflect in CPMS.

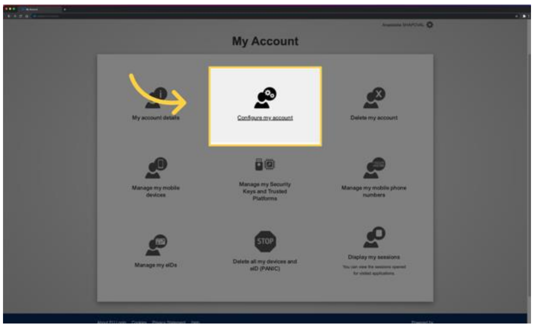
Link: https://wikis.ec.europa.eu/display/NAITDOC/EU+Login+-+European+Commission+Authentication+Service

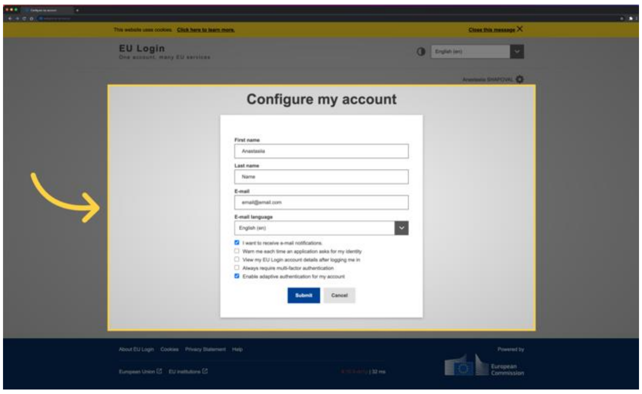
4. What happens if I forget my EU login credentials?

In case you forget your EU login credentials, visit the EU login page, and follow the provided instructions for account recovery. Link: https://wikis.ec.europa.eu/display/NAITDOC/EU+Login+-+European+Commission+Authentication+Service

5. How do I update my EU login information?

If you want to update your EU login information, you can follow these steps:

Step 1	Connect to your EU login
Step 2	Open your profile. Click on the wheel next to your username. Or go to: https://ecas.ec.europa.eu/cas/eim/external/restricted/edit.cgi
Step 3	Go to My Account.
Step 4	Click on “Configure my account”. 

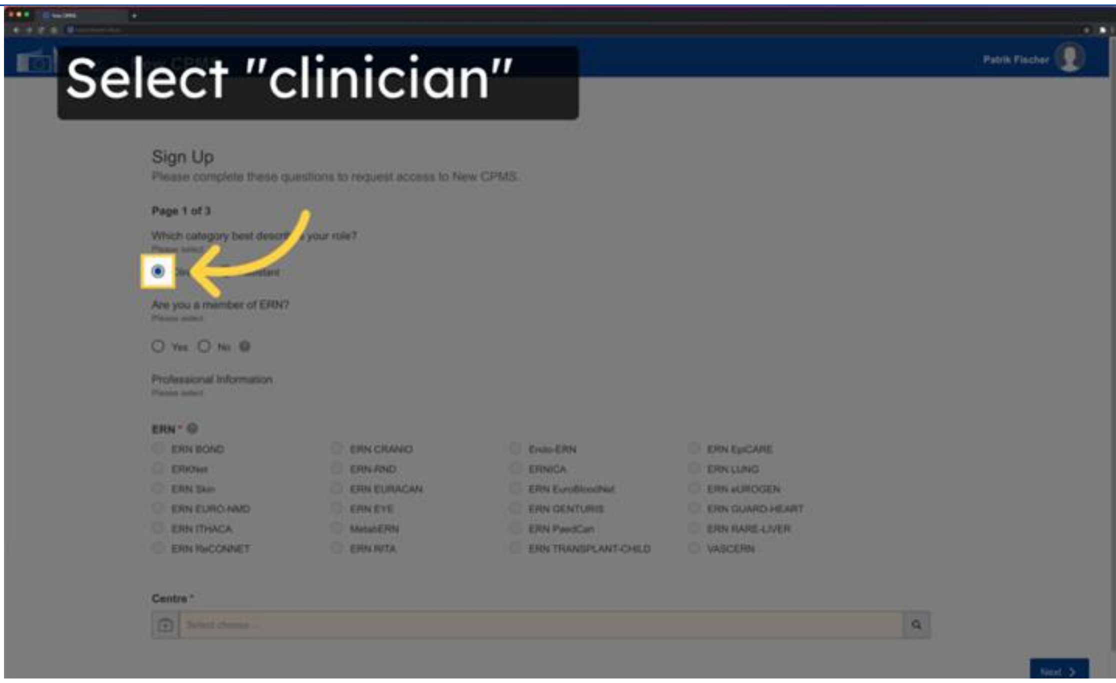
Step 5	Change your first name, last name, email, and press button “Submit” 

B. Sign-Up

1. How to Sign-Up for CPMS 2.0?

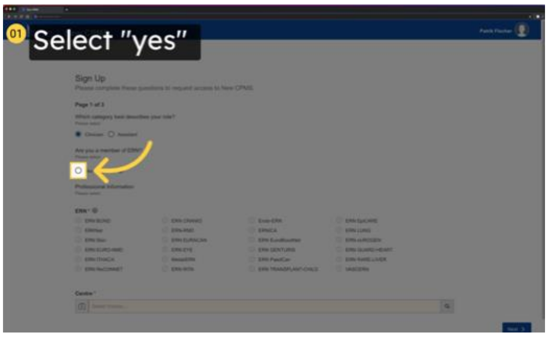
Follow the detailed steps below to sign-up for CPMS 2.0:

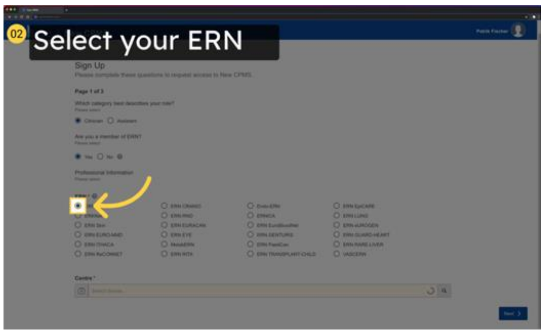
Step 1	Access the CPMS 2.0 from the public landing page.
Step 2	Click the "Log In" button.
Step 3	Ensure EU Login process is completed, including email/user ID, password, and dual-factor authentication.
Step 4	You will be redirected to the Sign-Up screen.
Step 5	Page 1/3: Select your role as "Clinician" and proceed to the next question.

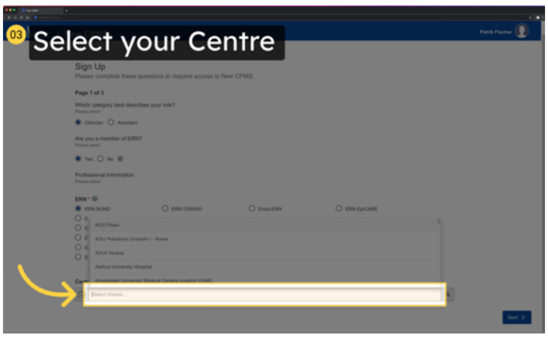


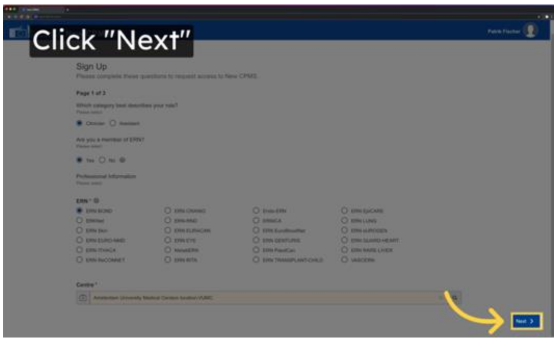
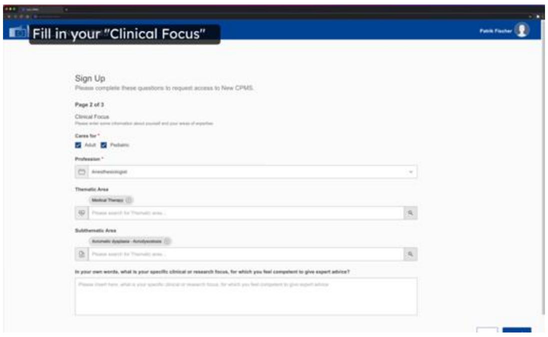
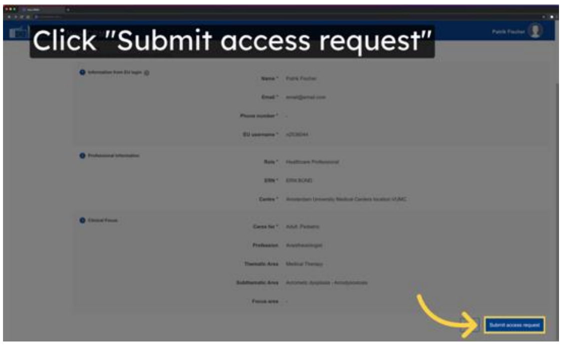
Step 6

When filling out your information as a clinician, please indicate whether you are member of an ERN (European Reference Network) or not. If you are, simply select your ERN from a list of predefined options. If you are not member of an ERN, you will be redirected to another flow where you will need to provide additional information. This information includes which ERN invited you, the name of your health care provider/hospital, and the country you work in. Please make sure to fill in all mandatory fields.





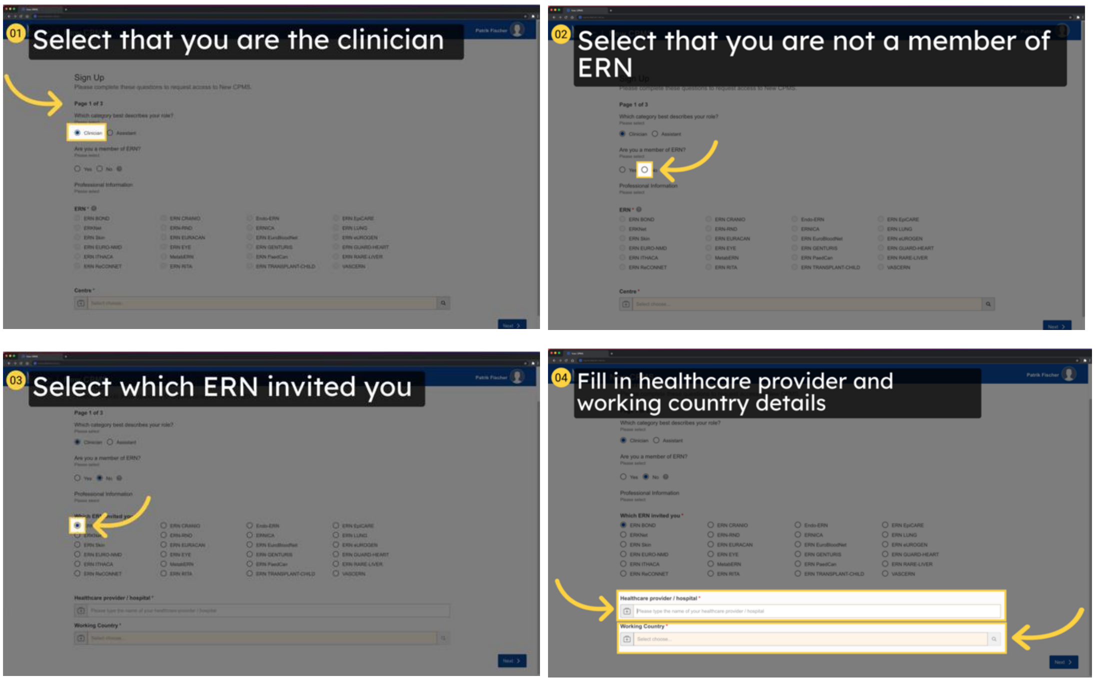


Step 7	Click “Next” button. 
Step 8	Provide detailed information about your clinical focus, including profession, thematic and sub-thematic areas, and a free text input. Click "Next" after completion. 
Step 9	Review your information and click "Submit access request." 

Your request status changes to “submitted”, and you'll be notified once approved.

2. Can Non-ERN Clinicians and Guests Sign Up?

Yes, non-ERN clinicians and guests can sign up by selecting their role and following the on-screen instructions. If you are a clinician who is not a member of an ERN, please indicate this during the sign-up process. You will then be redirected to another flow where you will need to provide additional information. This information includes the name of the ERN that invited you, the name of your health care provider or hospital, and the country you work in. Please ensure that you fill in all the mandatory fields.



C. Profile Management

1. Can I access CPMS 2.0 from different devices simultaneously?

It is possible to access CPMS2.0 application from 1 device on Web App and 1 device on mobile at the same time. However, it is crucial to ensure that you log in securely and have the necessary permissions to avoid any security breaches. You can use multiple devices not simultaneously with an internet connection to access CPMS 2.0, and your login credentials will remain the same across all devices. To ensure the safety of your data, please make sure you log out of CPMS 2.0 on any device that you are not actively using.

2. Can I access CPMS 2.0 from different geographical locations?

CPMS 2.0 can be accessed from any location across the world if the user has a stable internet connection. It is important to make sure that your internet connection is stable to avoid any interruptions while using the system.

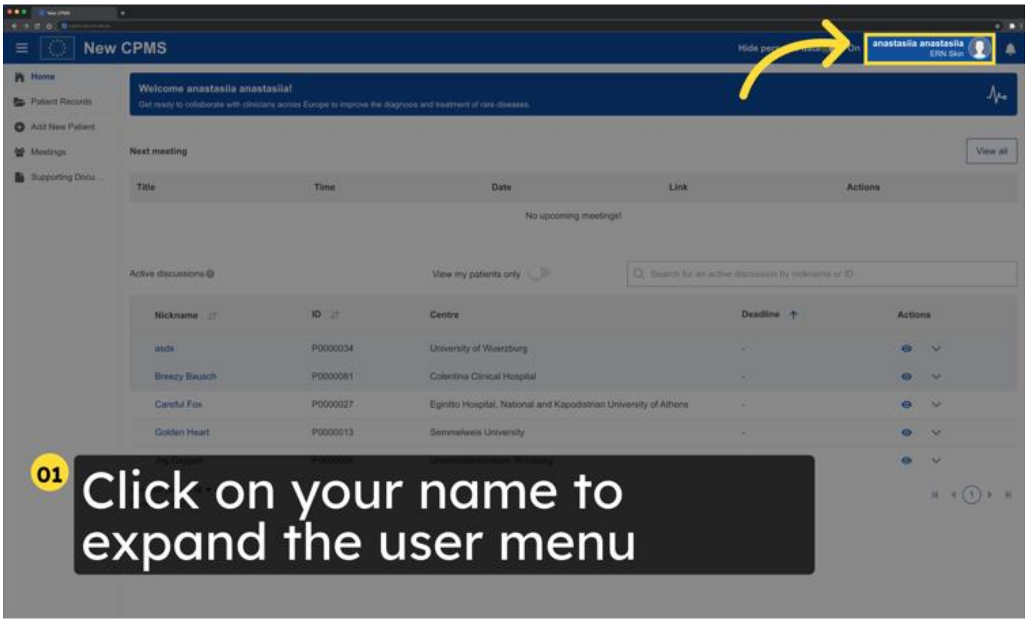
3. How is patient data anonymized inside the application?

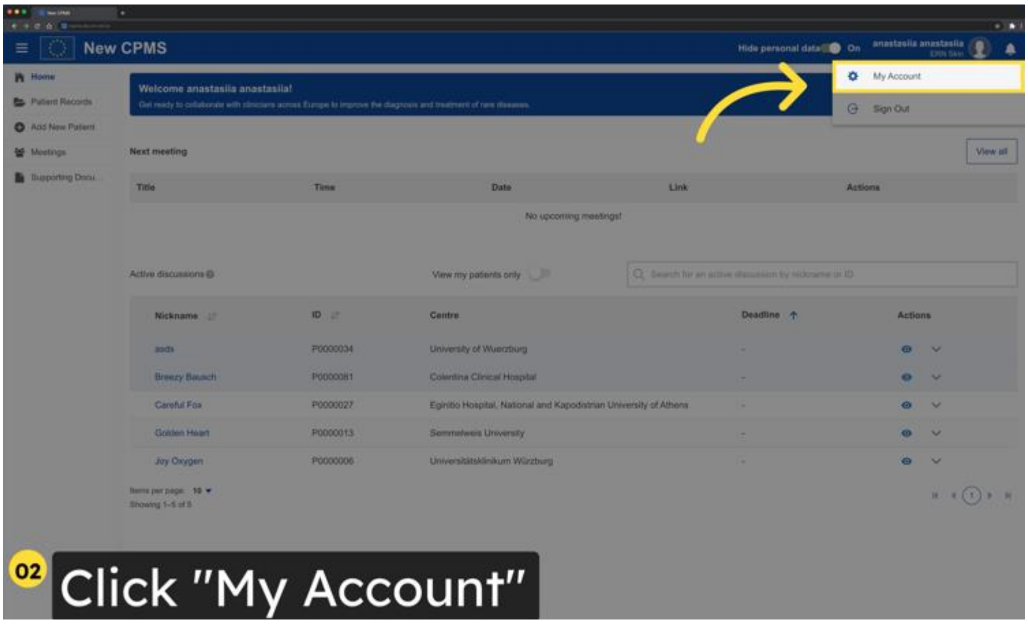
In CPMS 2.0 all users of the Care app will have default access to pseudonymized patient data, unique identifiers that cannot be traced back to the individual. Optionally, for GDPR compliance, patient personal information (first name, last name, birth date) is optionally visible and editable only to the clinicians who introduced the patient into the system and/or are the lead: Additionally, during file upload features:

- users are asked to make sure and confirm that the uploaded non-DICOM files do not include any sensitive information and that any sensitive medical information is also obscured or generalized to prevent identification.
- the system is checking DICOM files for structured tags including PI and removes those.

4. How do I navigate to the My Account page?

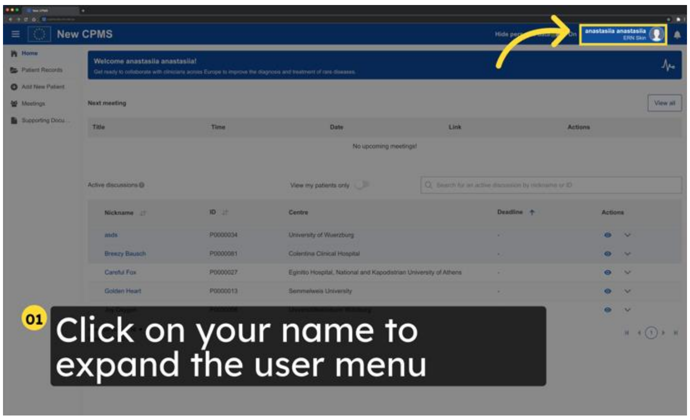
Follow the steps below to access your profile and manage your account information and preferences:

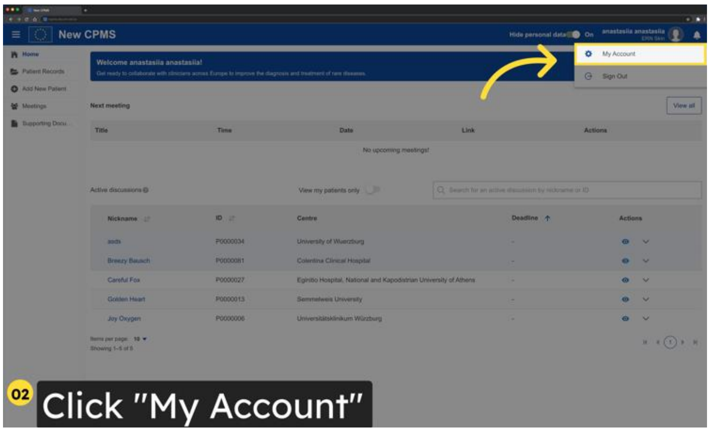
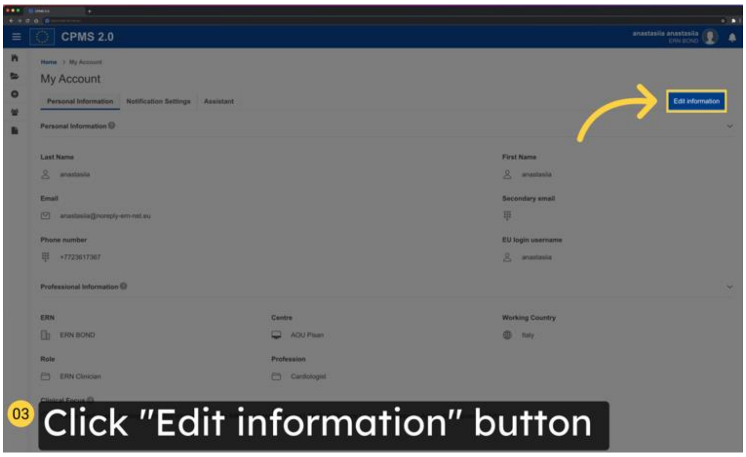
Step 1	Log in to the application using your credentials.
Step 2	Look for your name at the top bar of the page.
Step 3	Click on your name to expand the user menu. 

Step 4	From the user menu, select "My Account". 
Step 5	You will then be redirected to the My Account page where you can make changes to your account. On this page, you can edit your secondary email, profession, and clinical focus. If you need to change your role, please contact your ERN administrator. If you want to modify information such as your last name, first name, email, phone number, or EU login username, please visit the EU login, account page.

5. How do I update my contact information in My Account?

If you want to update your contact information, you can follow these steps:

Step 1	Log in to the application using your credentials.
Step 2	Click on your name in the top bar of the application. This will open the user menu. 

Step 3	From the expanded menu, select "My Account". This will take you to your profile. 
Step 4	Click the "Edit Information". 
Step 5	Simply type in the new information that you want to add or update in the relevant fields.
Step 6	Once you have entered the new information, click on the "Save" button to apply the changes. 

Please note you can edit your secondary email, profession, and clinical focus. If you need to change your role, please contact your ERN administrator. If you want to modify information such as your last name, first name, email, phone number, or EU login username, please visit the EU login, account page.

6. What is the purpose of the clinical focus section?

The clinical focus section describes your areas of expertise or specialty for which you are confident to provide expert advice. Clinical focus will be a sentence case formatted concatenation of your profession, the types of care you provide, the thematic areas you specialize in, the sub thematic/disease areas you are knowledgeable about, and your own words describing your expertise.

This section can be valuable in helping users understand your background and knowledge base. Providing a detailed and comprehensive clinical focus section can help users feel confident in seeking your advice and guidance.

7. Why it is important to fill in your clinical focus?

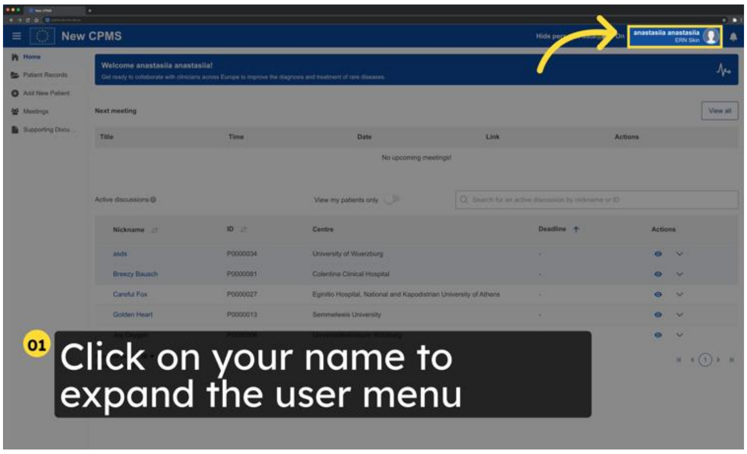
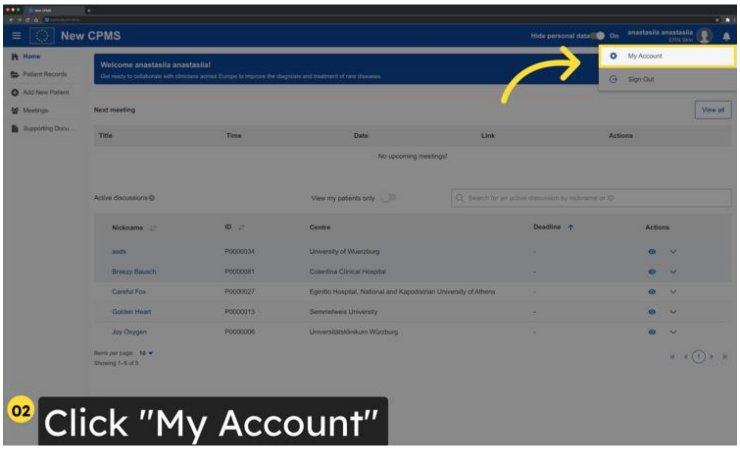
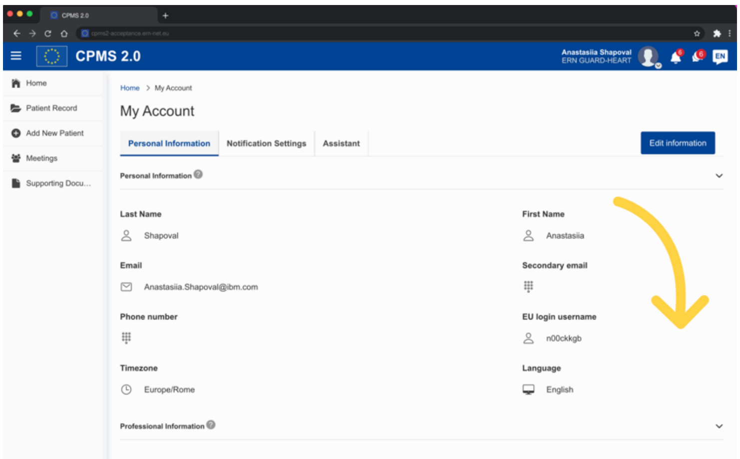
The clinical focus section describes your areas of expertise or specialty for which you are confident to provide expert advice. By having a detailed clinical focus section, you can help users feel more confident in seeking your advice and guidance. If someone wants to include you in a discussion or meeting, they may do so based on your clinical focus. This can help ensure that you are contributing to discussions and providing guidance in areas where you have the most expertise.

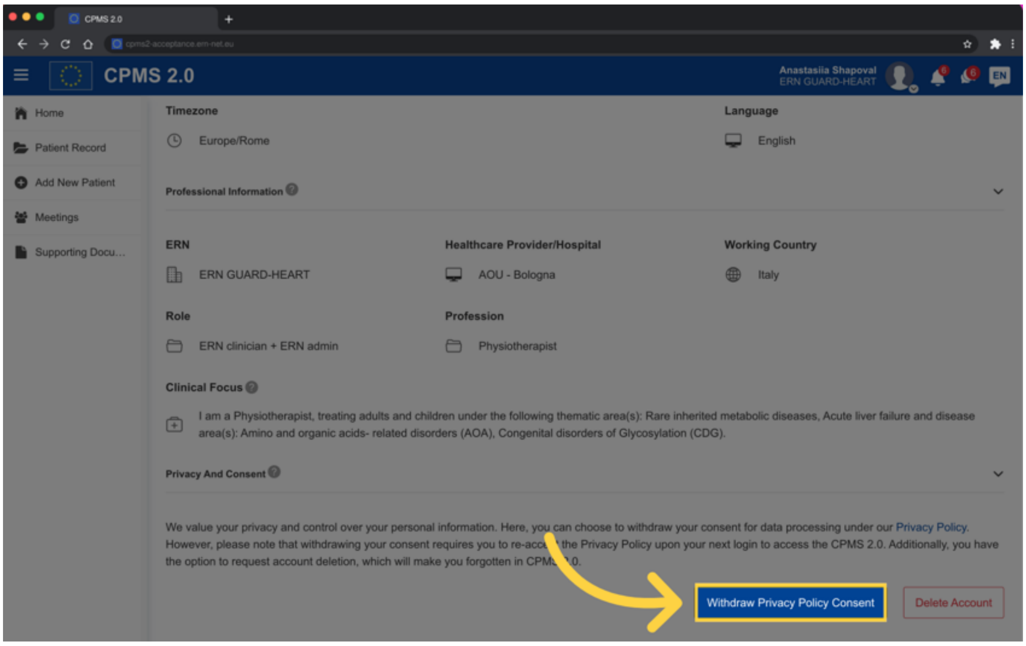
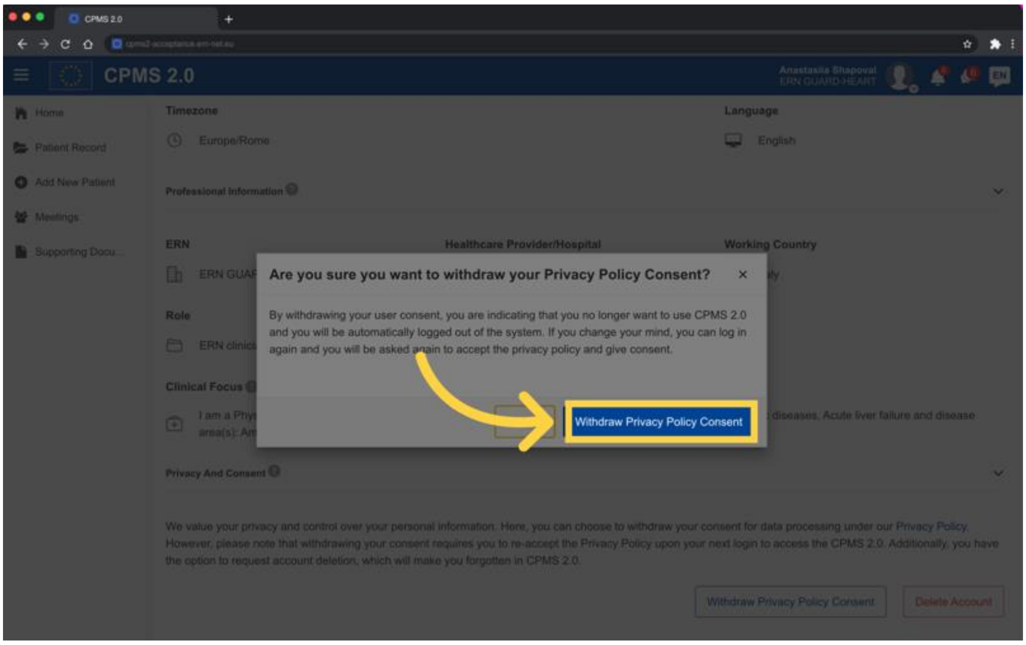
8. Can I customize My Account in CPMS 2.0?

Yes, you can. To customize your profile in the application, you can simply navigate to the dedicated My Account page. Once there, you'll have the ability to modify various aspects of your profile, such as your personal and professional information. You can also customize your notification preferences so that you receive alerts and updates in a manner that suits your needs. Additionally, you may have access to other customization options, depending on the features and functionalities of your application profile.

9. How can I withdraw Privacy Policy Consent?

If you want to withdraw privacy policy consent, you can follow these steps:

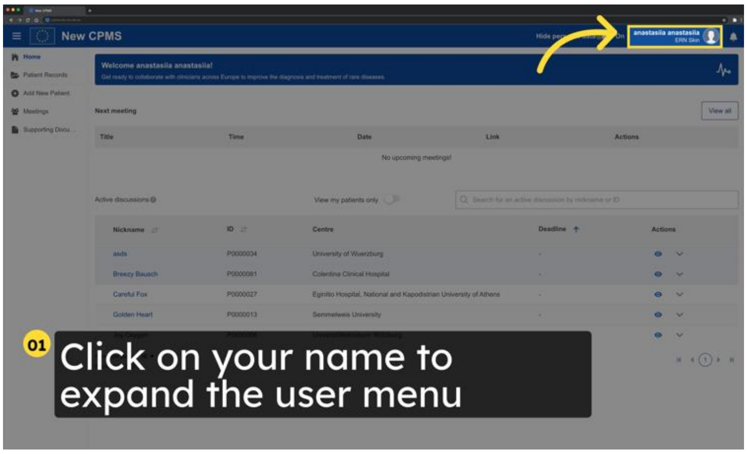
Step 1	Log in to the application using your credentials.
Step 2	Click on your name in the top bar of the application. This will open the user menu. 
Step 3	From the expanded menu, select "My Account". This will take you to your profile. 
Step 4	Scroll down to the “Privacy and Consent” section inside the Personal Information tab. 

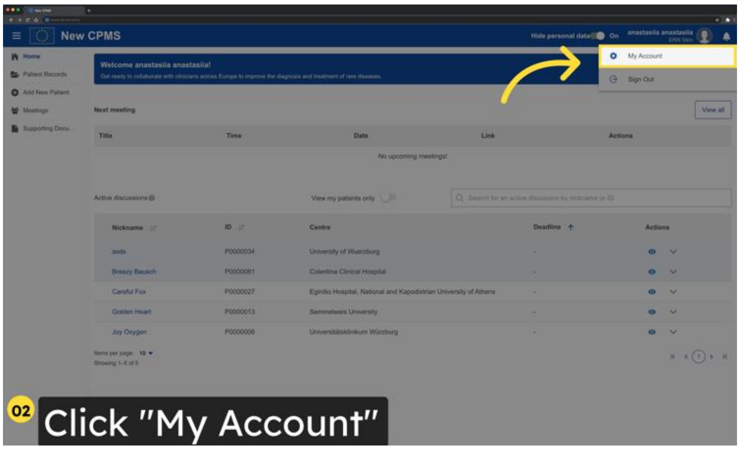
Step 5	Click on the "Withdraw Privacy Policy Consent" button. 
Step 6	Inside the confirmation pop-up click on the "Withdraw Privacy Policy Consent" button. 

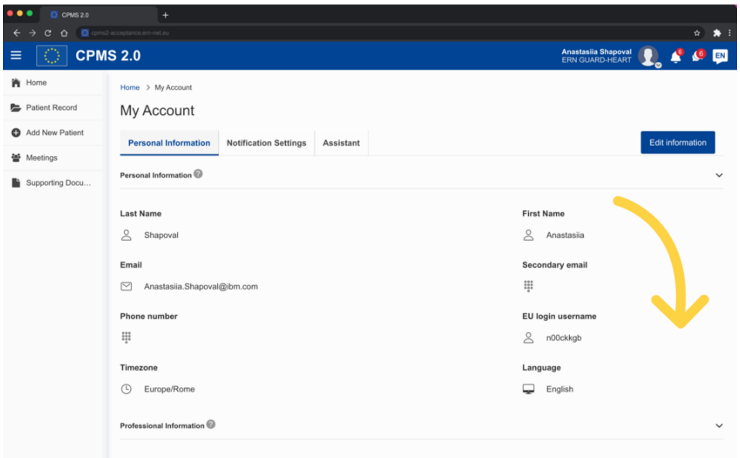
10. How can I delete my account?

If you want to delete your account, you can follow these steps:

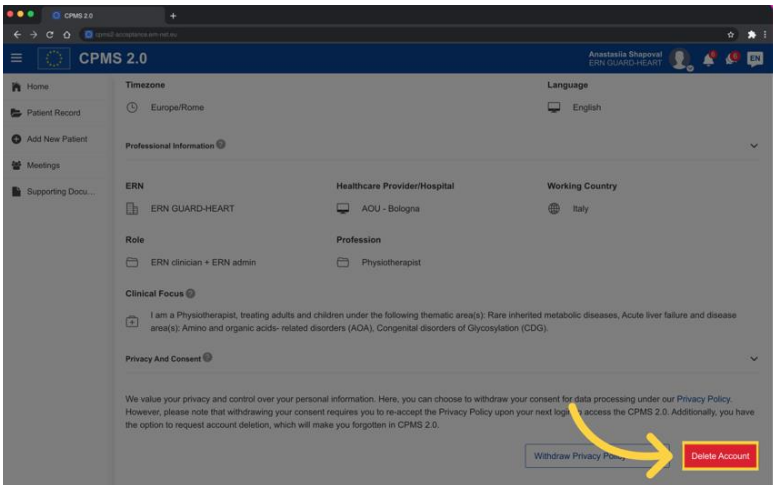
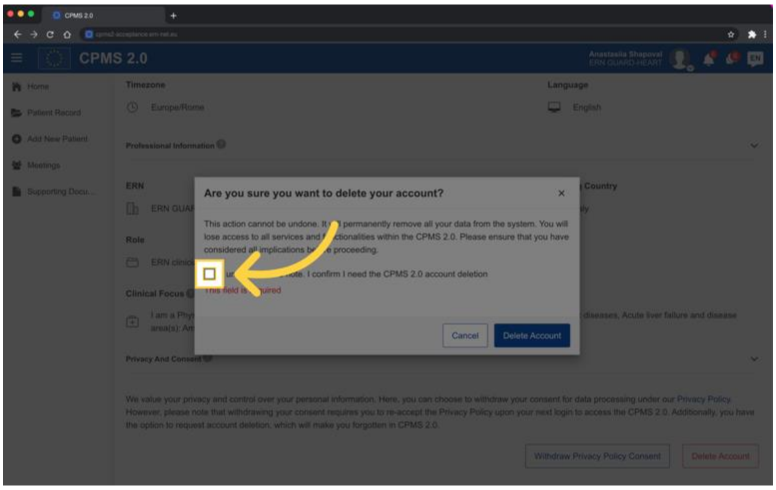
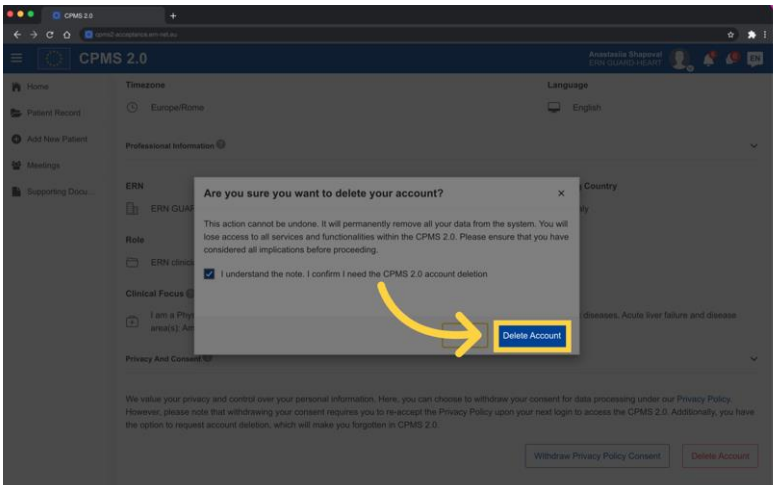
Step 1	Log in to the application using your credentials.

<table>
<tr><td>Step 2</td><td>Click on your name in the top bar of the application. This will open the user menu.


</td></tr>
<tr><td>Step 3</td><td>From the expanded menu, select "My Account". This will take you to your profile.


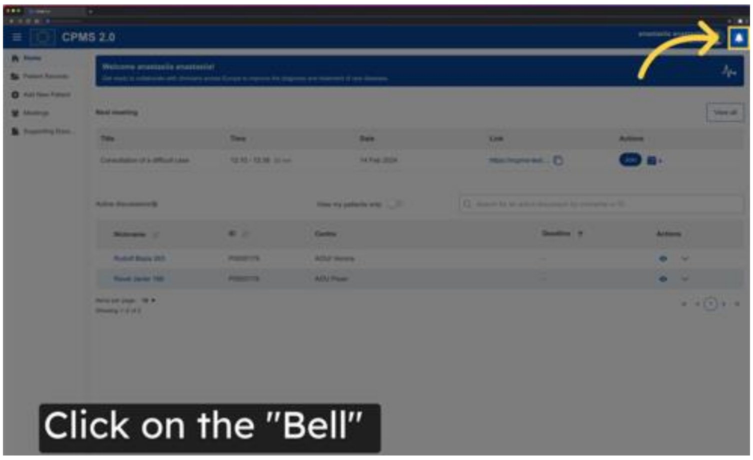
</td></tr>
<tr><td>Step 4</td><td>Scroll down to the “Privacy and Consent” section inside the Personal Information tab.


</td></tr>
</table>

Step 5	Click on the “Delete Account” button. 
Step 6	Inside the confirmation pop-up check the checkbox to proceed with the deletion. 
Step 7	Inside the confirmation pop-up click on the “Delete Account” button. 

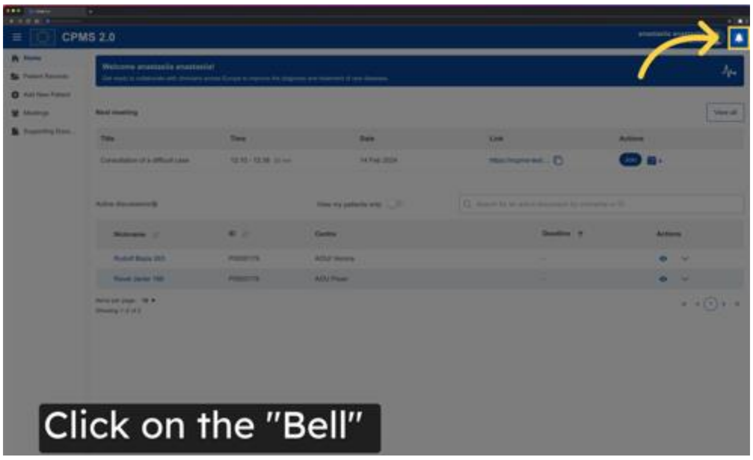
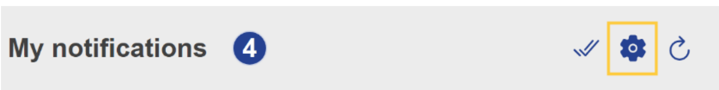
11. How can I view my notifications?

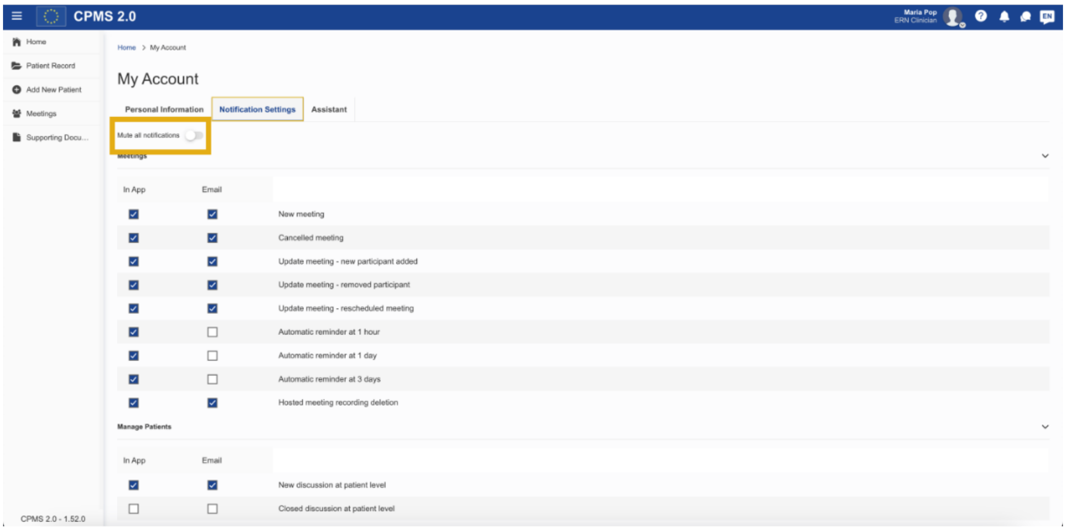
If you want to view your notifications in CPMS 2.0, follow these steps:

Step 1	Log in to the application using your credentials.
Step 2	Click on the “Bell” icon that is in the top menu. 
Step 3	You will be able to see your recent notifications.

12. How can I mute/unmute my notifications?

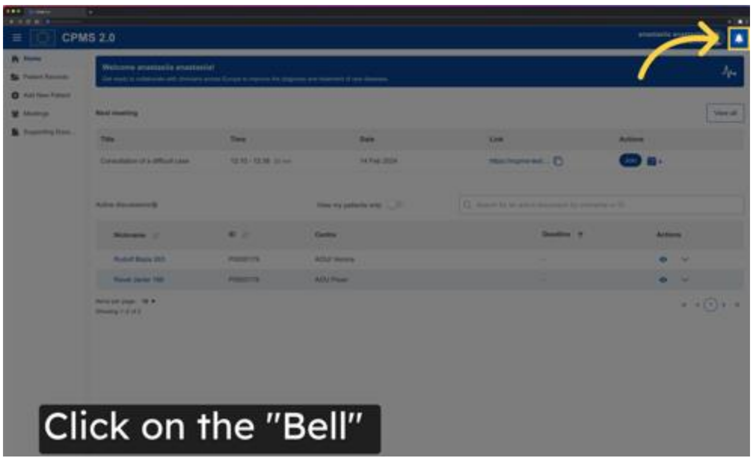
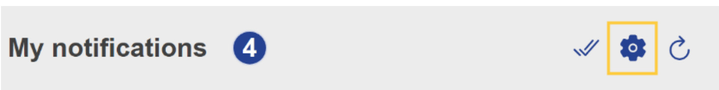
If you want to mute/unmute your notifications in CPMS 2.0, follow these steps:

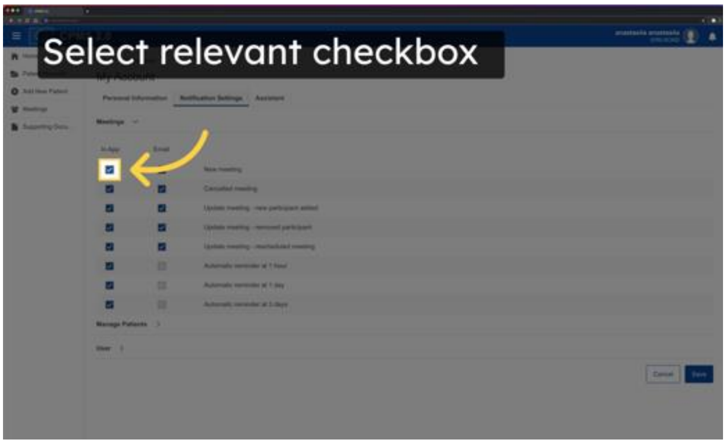
Step 1	Log in to the application using your credentials.
Step 2	Click on the “Bell” icon that is located in the top menu. 
Step 3	Click the Settings wheel for notification settings. 
Step 4	Once on the Notification Settings page, you'll see a list of various notification events categorized by in-app and email notifications.

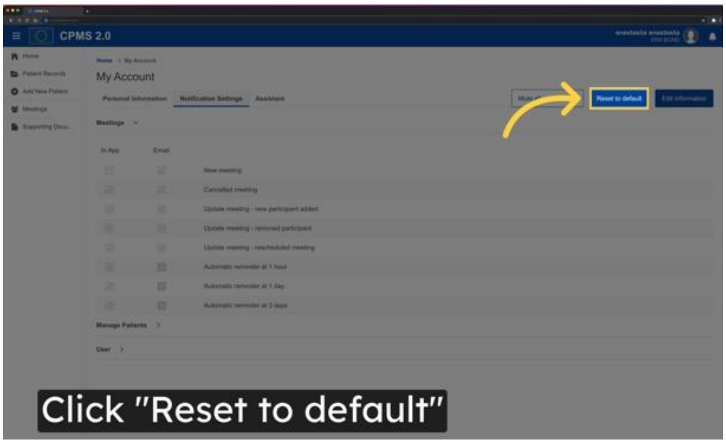
<table>
<tr><td>Step 5</td><td>Press the toggle to mute all notifications, In App or Email, for every single category. To unmute all notifications, press again the toggle.

</td></tr>
</table>

13. How do I change my notification preferences in the application?

If you want to change your notification preferences in CPMS 2.0, follow these steps to customize your in-app and email notifications according to your preferences:

<table>
<tr><td>Step 1</td><td>Log in to the application using your credentials.</td></tr>
<tr><td>Step 2</td><td>Click on the “Bell” icon that is located in the top menu.

</td></tr>
<tr><td>Step 3</td><td>Click the Settings wheel for notification settings.

</td></tr>
</table>

Step 4	Once on the Notification Settings page, you'll see a list of various notification events categorized by in-app and email notifications.
Step 5	For each notification event, you can turn the "In-App" switch on or off to enable or disable in-app notifications. In-app notifications are displayed within the CPMS interface when you are logged in. 
Step 6	Similarly, for each notification event, you can turn the "Email" switch on or off to enable or disable email notifications. Email notifications are sent to your registered email address and provide updates even when you are not actively using CPMS.
Step 7	After adjusting your preferences, make sure to click the "Save" button at the bottom of the Notification Settings page. This will apply the modifications you've made and update your notification preferences accordingly. 
Step 8	If you decide not to save the changes you made, you can click the "Cancel" button. This will discard any modifications made during the current session.

Step 9	If you want to revert all your notification preferences to the default settings, there is an option to do so on the Notification Settings page. Click on the "Reset to default" option, and the system will set the notification preferences to the standard settings. 

14. What are the different types of notifications?

The CPMS 2.0 provides two types of notifications - In-App and via email. In-App notifications are messages that appear within the application itself, while Email notifications are sent to your registered email. It's important to note that there are two email fields available in the CPMS 2.0 - the primary one is used for EU login and the secondary email is optional. If you fill in both email fields, you will only receive email notifications on your secondary email.

To manage your notifications, you can go to the “My Account” page and click on the Notifications tab. There, you can customize the notifications you receive by checking checkboxes on or off.

15. What are the default notifications settings?

The following table shows the default notifications settings:

Section	Description	In App	Email
Meetings	New meeting	Yes	Yes
	Cancelled meeting	Yes	Yes
	Update meeting - new participant added	Yes	Yes
	Update meeting - removed participant	Yes	-

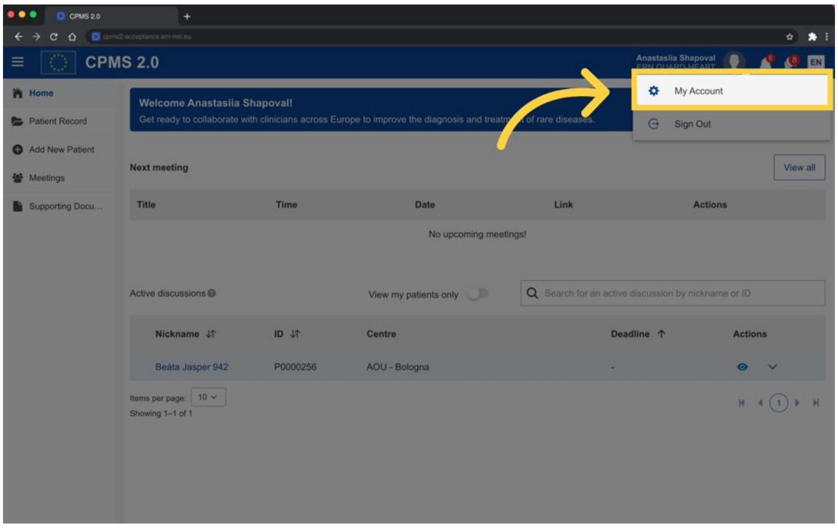
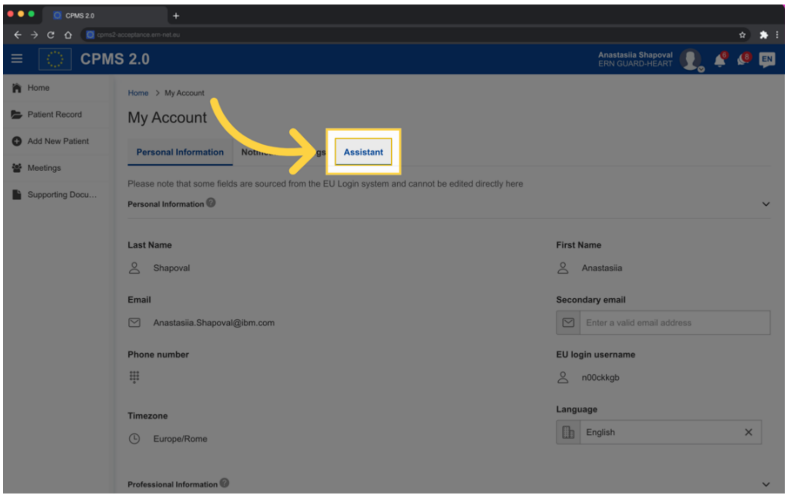
	Update meeting - rescheduled meeting	Yes	Yes
	Automatic reminder at 1 hour	Yes	-
	Automatic reminder at 1 day	Yes	-
	Automatic reminder at 3 days	Yes	-
	Hosted meeting recording deletion	Yes	Yes
Manage Patients	Discussion open	Yes	Yes
	Closed discussion at patient level	Yes	-
	Update patients remove participant	Yes	-
	Update patients add new participant	Yes	Yes
	New messages in a discussion at patient level	Yes	-
	Patient - retention date upcoming	Yes	-
	Patient - remove yourself	Yes	-
	Patient discussion - "@" mention	Yes	Yes
User Account	User's app role / clinical focus is updated by someone	Yes	-
	User is reactivated	Yes	-
	User account updates - to ERN	Yes	-
	User account - updates - from ERN standins	Yes	-
	User account - update ERN	Yes	-
	Maintenance mode	Yes	-

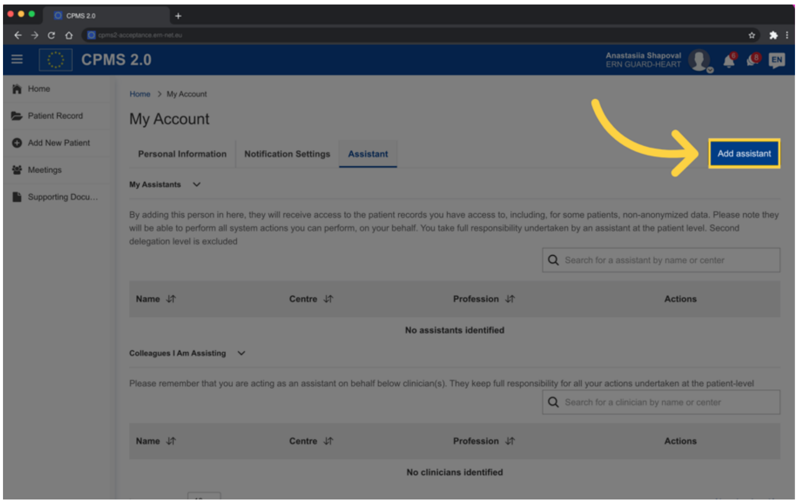
16. Can I customize the information displayed on the homepage?

At the moment, there is no option to personalize or modify the information that appears on the homepage. The information you see on the homepage is predetermined by the system and cannot be changed. However, we are constantly working on improving our platform and adding new features, so please stay tuned for any updates in the future.

17. Can I be assisted by other users?

If you need to transfer ownership of your account to another user, you can do so by delegating ownership through the assignment of assistants. Here's how:

Step 1	Log in to the application using your credentials.
Step 2	To start the process, click on your name in the top bar and select “My Account". This will take you to your profile page. 
Step 3	Once you are on the My Account page, go to the "Assistants" tab. Under the "Colleagues I am assisting" section, you can view users for whom you are an assistant. 

Step 4	To assign a new stand-in, click on "Add Assistant" button. You can then perform a search for a user within the same clinical center as you and select them as an assistant. 
Step 5	Once you have assigned an assistant, they will have the same system capabilities as you at the patient level. Essentially, the ownership of your account is now shared between the clinician and their assigned assistant.

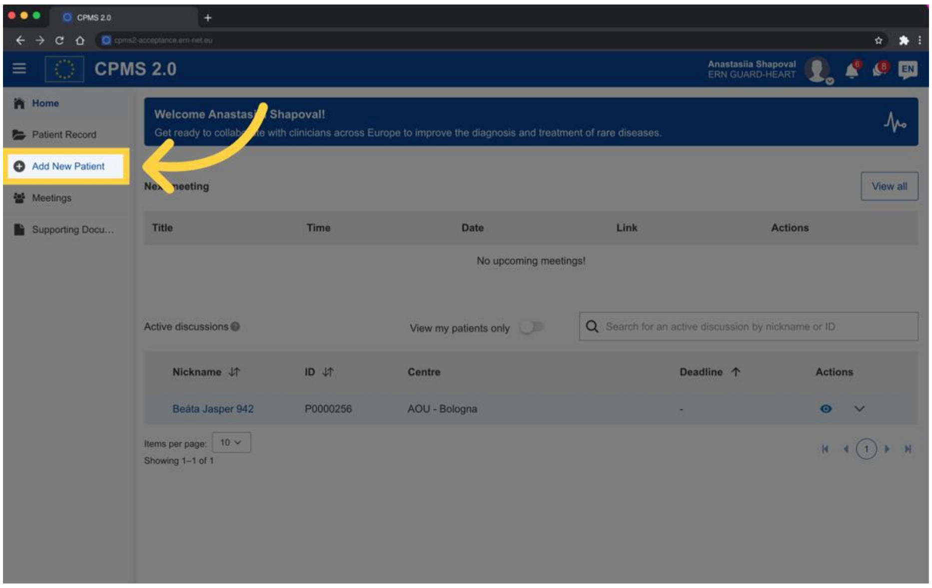
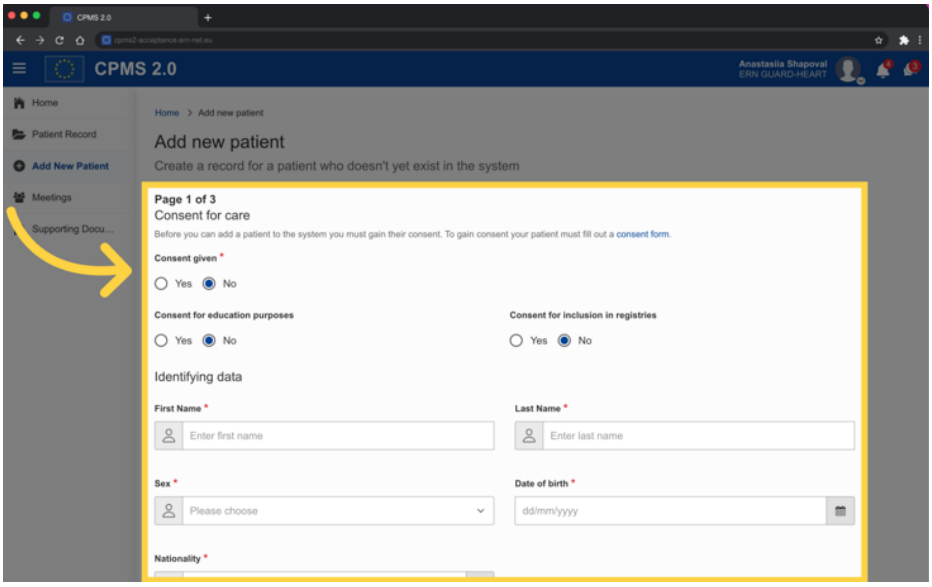
Please note that this feature is developed for a single level of delegation, and a second level of delegation is currently not supported.

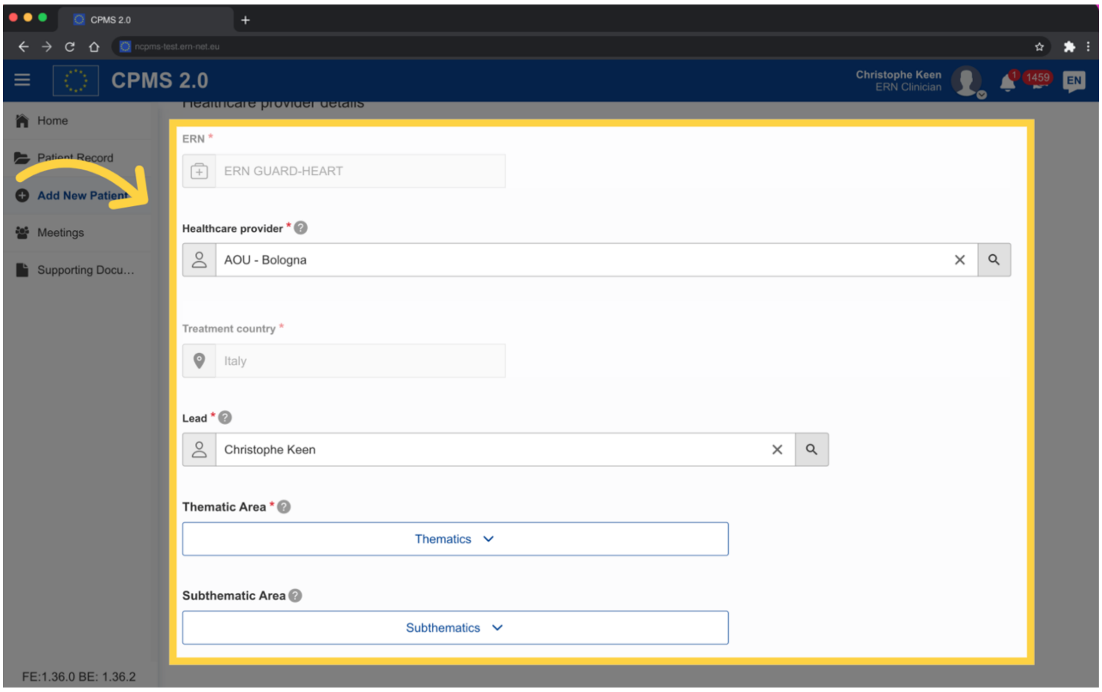
D. Enroll a patient

1. How can I create a patient?

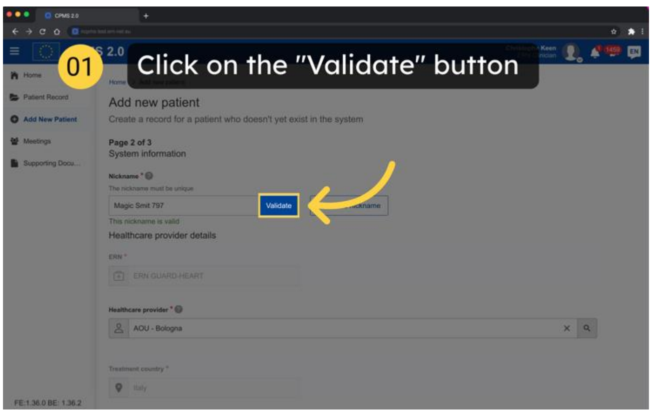
To create a new patient in CPMS 2.0, please follow these steps:

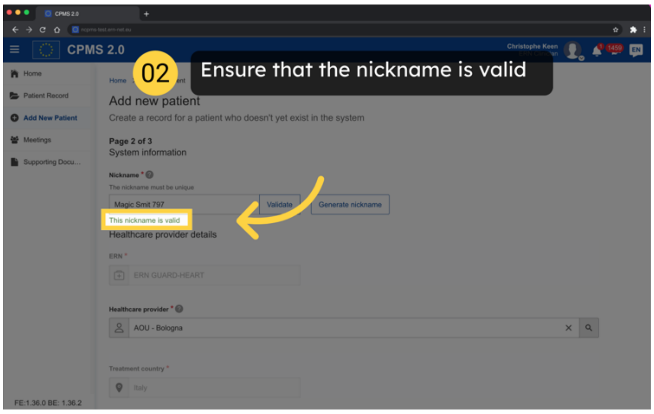
Step 1	Log in to the CPMS 2.0 system using your credentials.

<table>
<tr>
<td>Step 2</td>
<td>From the left-hand side menu, select "Add New Patient".

</td>
</tr>
<tr>
<td>Step 3</td>
<td>Fill in the patient's identifying data like first name, last name, sex, date of birth, and nationality.

</td>
</tr>
</table>

<table>
<tr>
<td>Step 4</td>
<td>Proceed to the next page to generate or validate a nickname, select a healthcare provider, lead, record assistant, thematic area, and sub thematic area.

</td>
</tr>
<tr>
<td>Step 5</td>
<td>Review the overview page and confirm the patient creation.</td>
</tr>
</table>

Please be aware that the system proposes a default generated nickname for you, but feel free to modify it as per your preference. However, while selecting a nickname, please ensure that you validate it to confirm that it's not already in use.





2. Is there a maximum limit to the number of patients records you can manage?

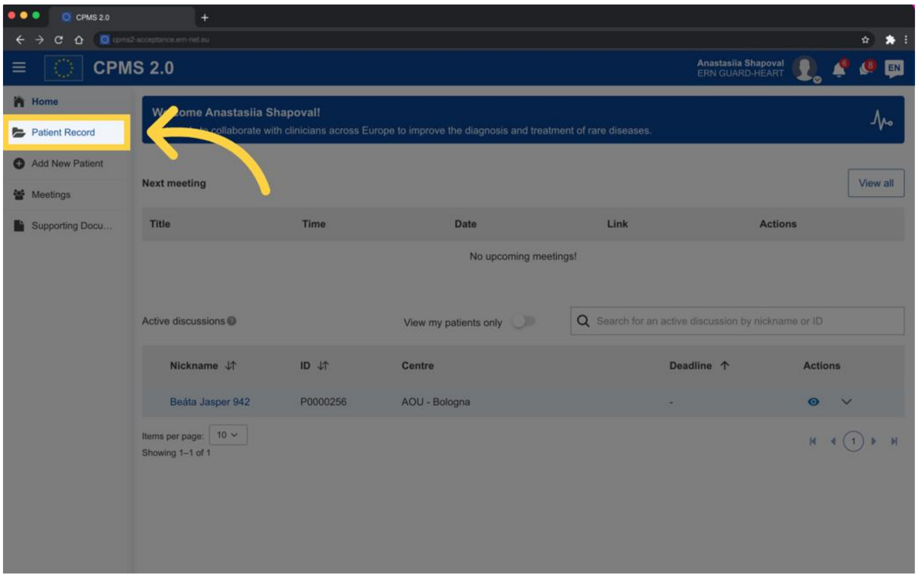
There is no maximum limit to the number of patients records you can manage. Access to patient records is based on your role and permissions.

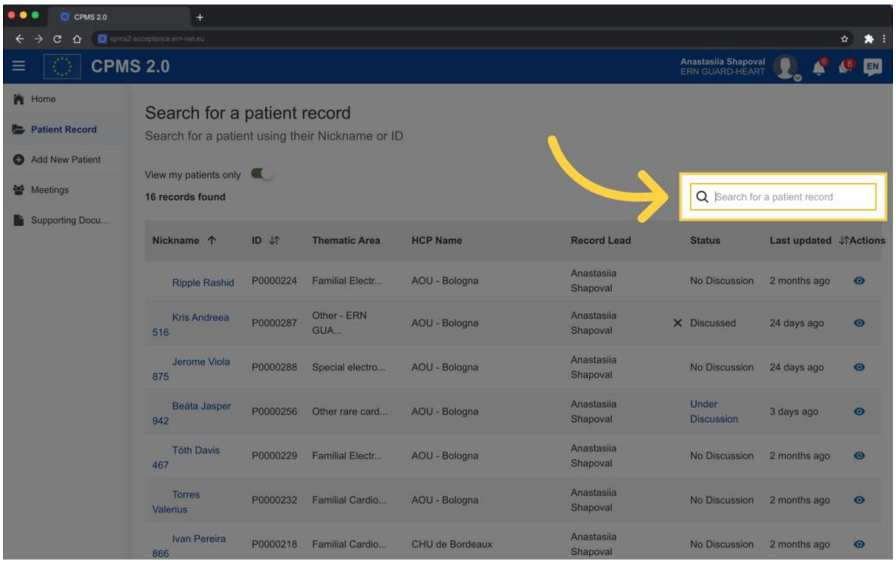
3. Are patient records can be archived or removed?

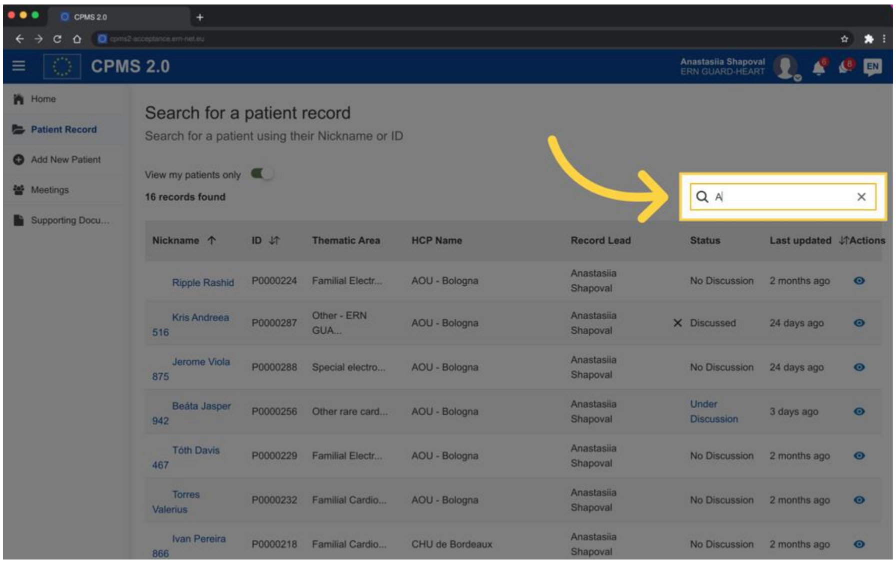
At this moment, it is not possible to archive or delete patient records. However, we are constantly working on improving our platform and adding new features, so please stay tuned for any updates in the future.

4. How do I search for a patient record in CPMS 2.0?

To search for a patient record in CPMS 2.0, you need to follow the steps below:

<table>
<tr><td>Step 1</td><td>Log in to the CPMS 2.0 system using your credentials.</td></tr>
<tr><td>Step 2</td><td>Access the "Patient Records" page from the left-hand side menu.

</td></tr>
</table>

<table>
<tr>
<td>Step 3</td>
<td>Once you are in the "Patient Records" page, look for the search bar. It is located above the table on the right side.


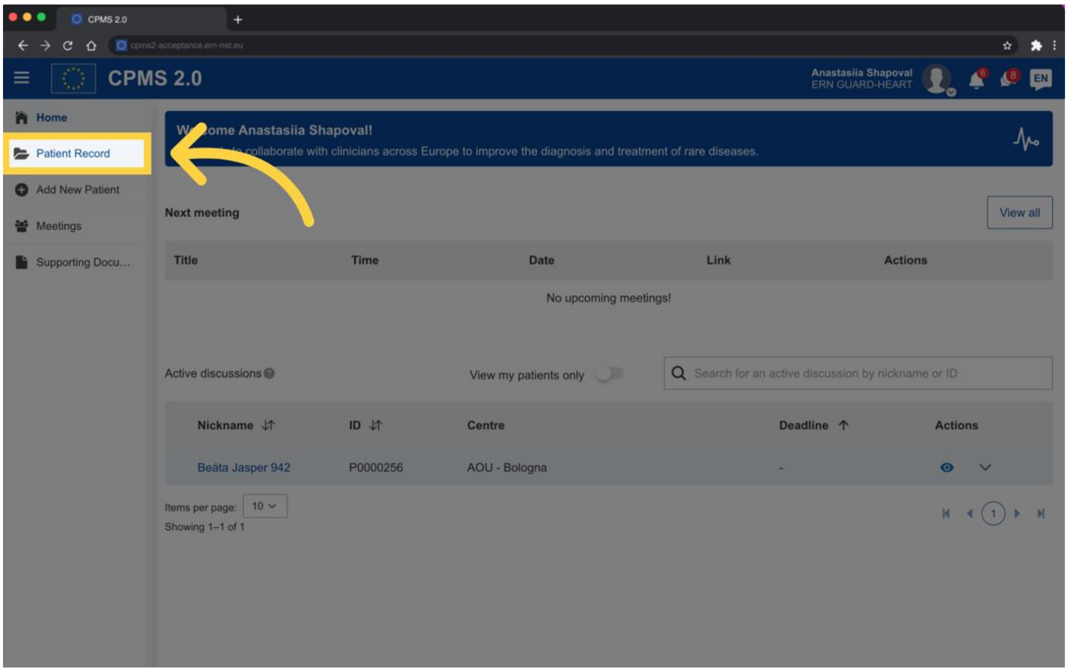
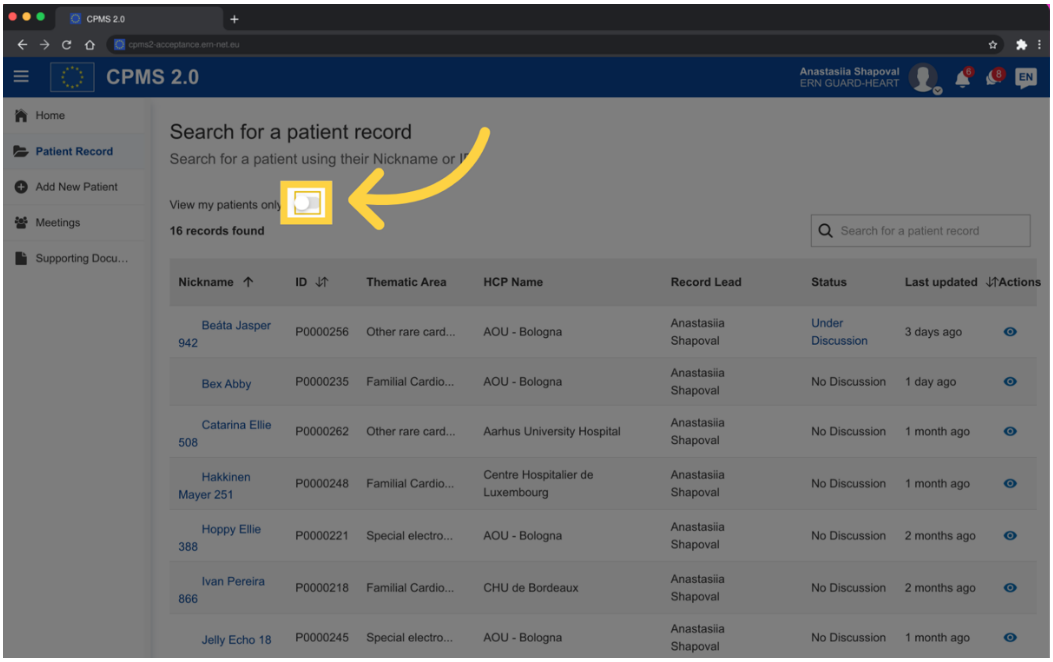
</td>
</tr>
<tr>
<td>Step 4</td>
<td>In the search bar, enter the patient's nickname or ID. Make sure you enter the correct information to avoid getting incorrect search results.


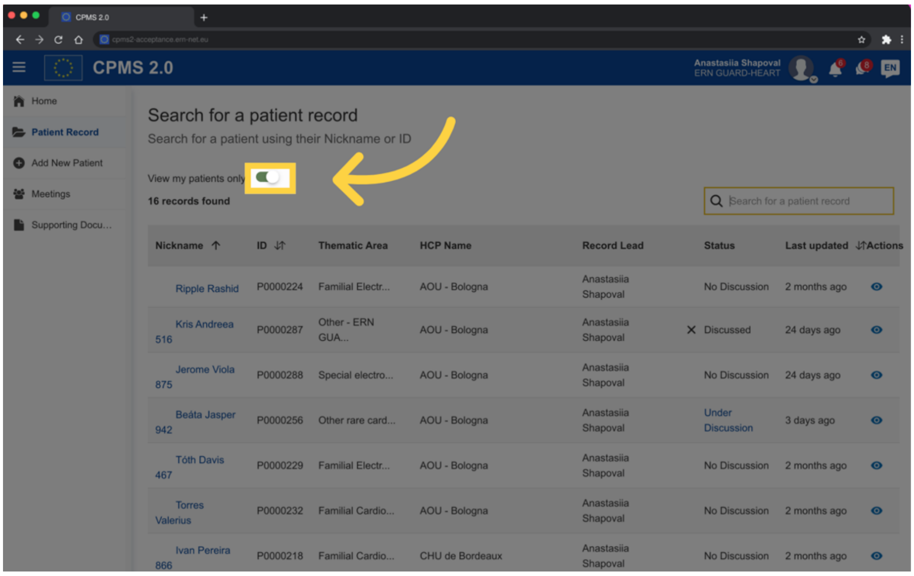
</td>
</tr>
<tr>
<td>Step 5</td>
<td>The table will display patient details including nickname, ID, thematic area, HCP name, lead, status, last updated and actions with an "eye" icon to view details.</td>
</tr>
</table>

If you want to view the full patient record, click on the patient's nickname or ID. This will take you to the patient's record page where you can view all the details related to that patient.

5. How can I view my patients only?

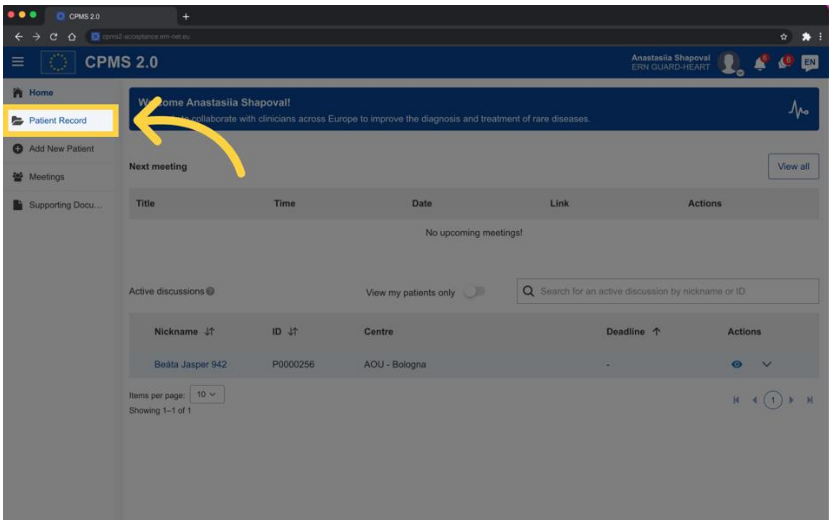
If you want to view only your patients in CPMS 2.0, follow these steps:

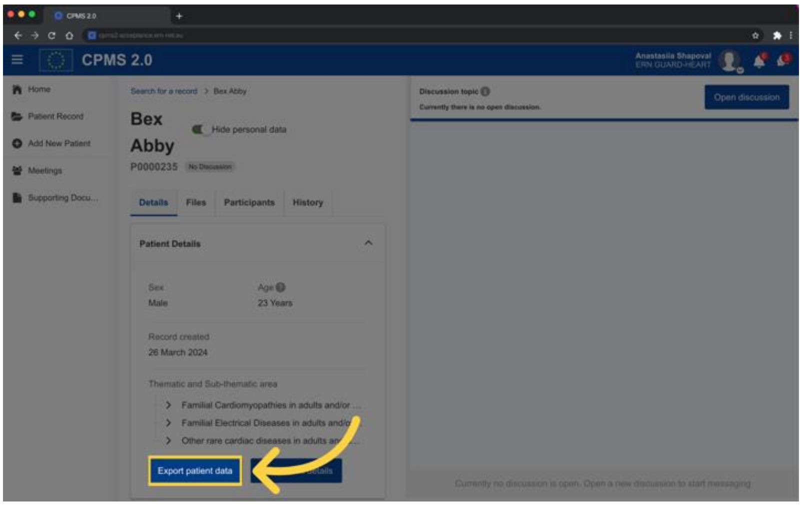
<table>
<tr><td>Step 1</td><td>Log in to the CPMS 2.0 system using your credentials.</td></tr>
<tr><td>Step 2</td><td>Access the "Patient Records" page from the left-hand side menu.

</td></tr>
<tr><td>Step 3</td><td>On the "Patient Records" page, you will see a toolbar above the table on the right side.

</td></tr>
</table>

Step 4	Look for the "View My Patients Only" switch and toggle it to "Yes". 
Step 5	The system will show you a table with columns displaying details of your active patients, filtered by 'patient owner' as the current user.
Step 6	To further filter the results, you can use the search bar to enter the patient's nickname or ID.

6. How can I export patient data?

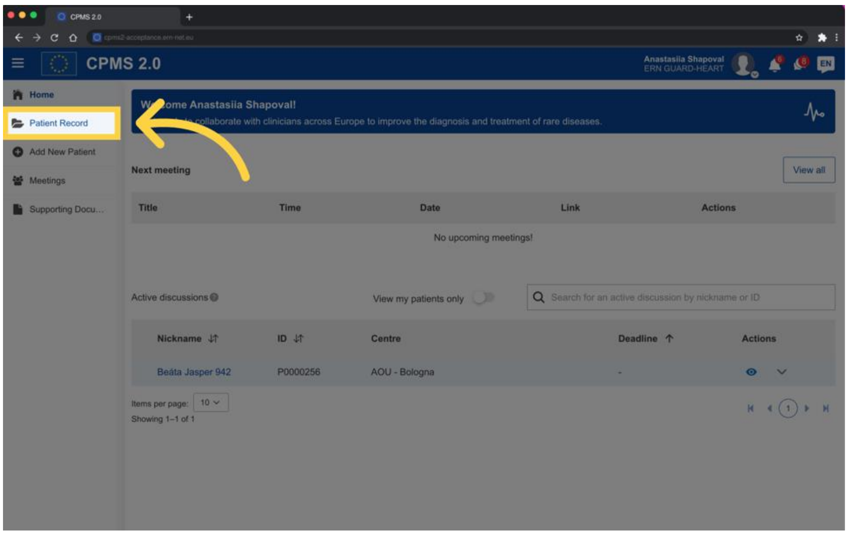
If you are the lead record, follow these steps to export patient data of your patient:

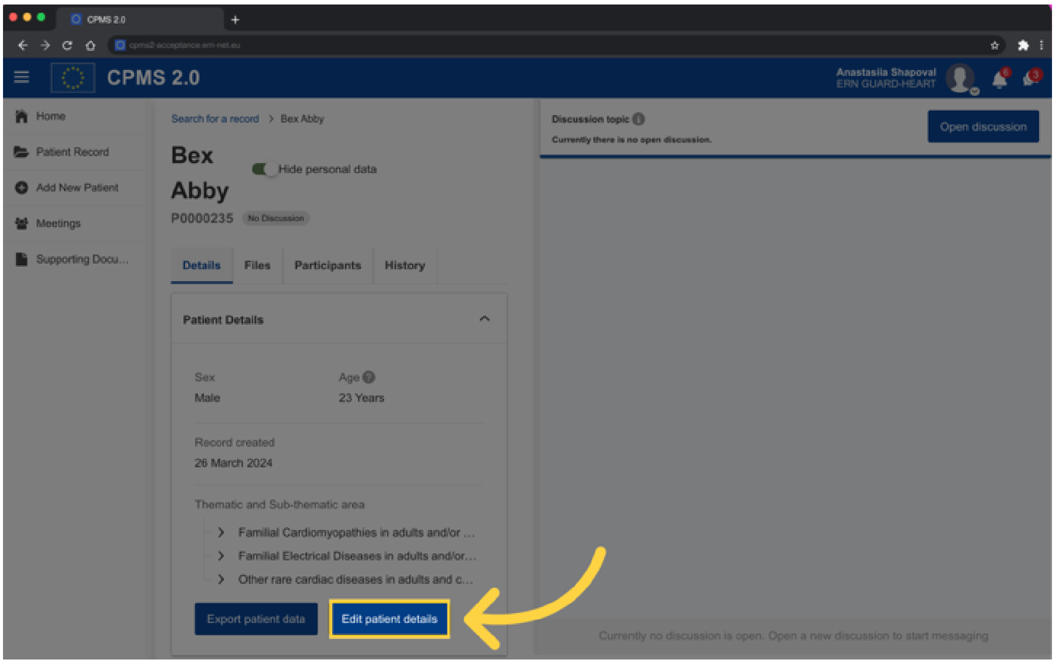
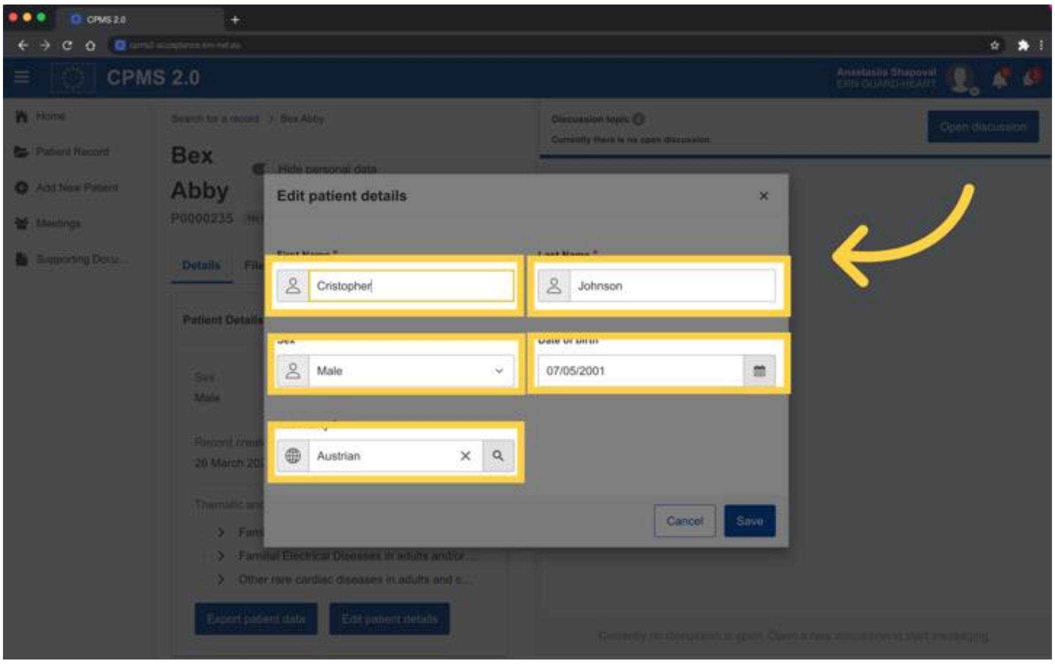
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu. 

Step 3	Navigate to the patient profile for which you want to export patient data. You can do this by either searching for the patient's name in the search bar at the top of the page or by browsing through the list of patients on the page.
Step 4	Under the “Details” tab click on the “Export patient data” button. 
Step 5	The file download will start, and you may be able to track its progress. Once the download is complete, the file will be saved to your computer.

7. How can I edit patient details?

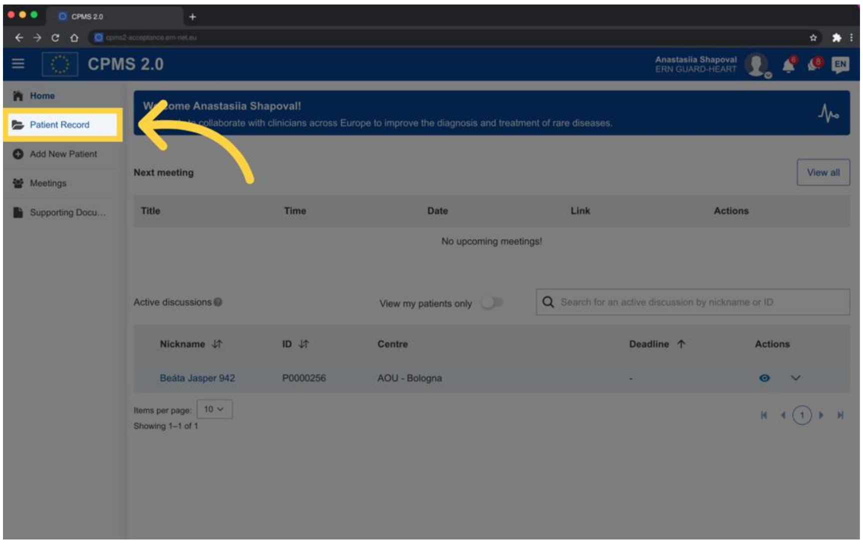
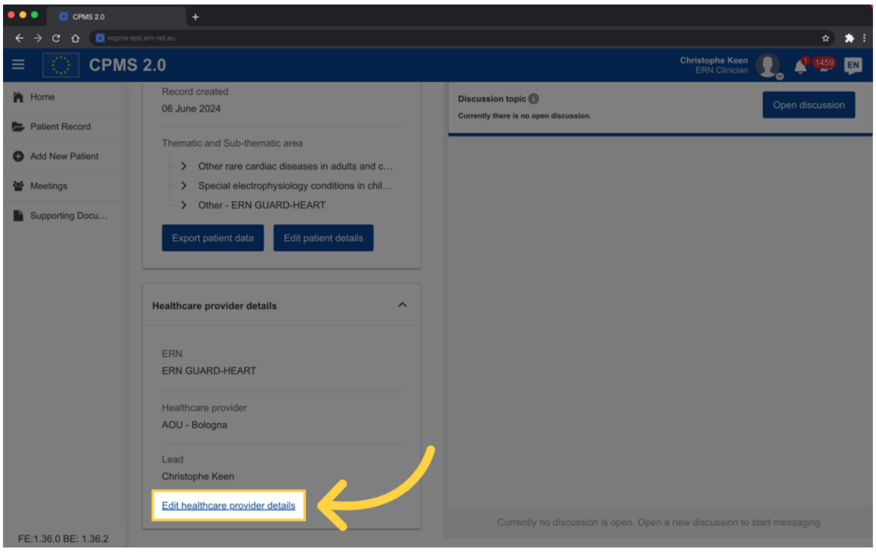
If you are the lead, follow these steps to edit patient details of your patient:

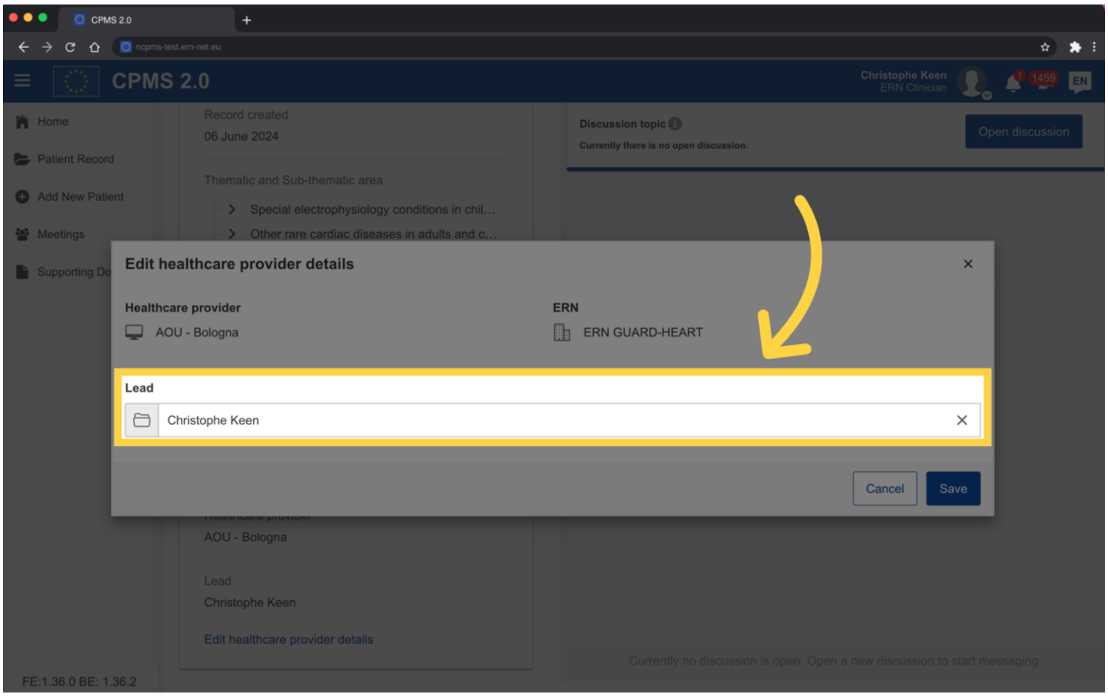
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu. 

<table>
<tr><td>Step 3</td><td>Navigate to the patient profile for which you want to edit patient details. You can do this by either searching for the patient's name in the search bar at the top of the page or by browsing through the list of patients on the page.</td></tr>
<tr><td>Step 4</td><td>Under the “Details” tab click on the “Edit patient details” button.

</td></tr>
<tr><td>Step 5</td><td>Inside the pop-up, edit patient details.

</td></tr>
<tr><td>Step 6</td><td>Once you have made all the required edits, click on the "Save" button.</td></tr>
</table>

8. How can I edit healthcare provider details?

If you are the lead record, follow these steps to edit the healthcare provider details of your patient:

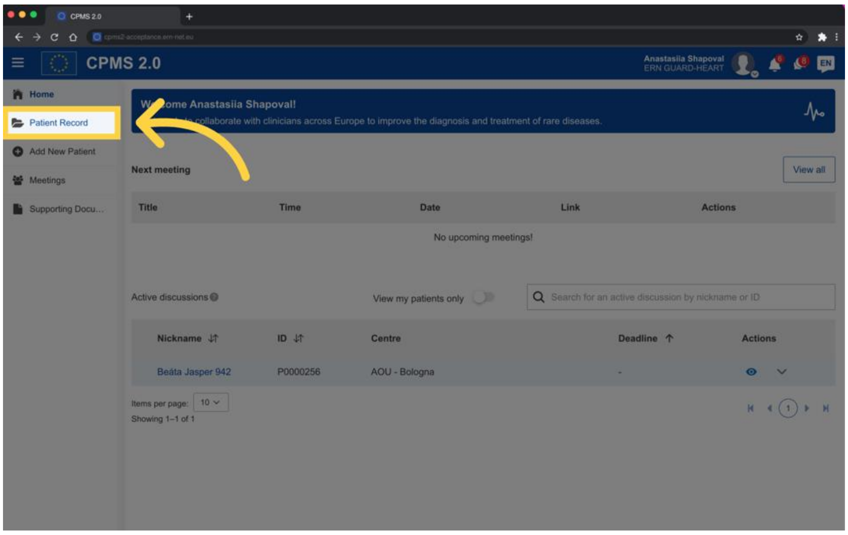
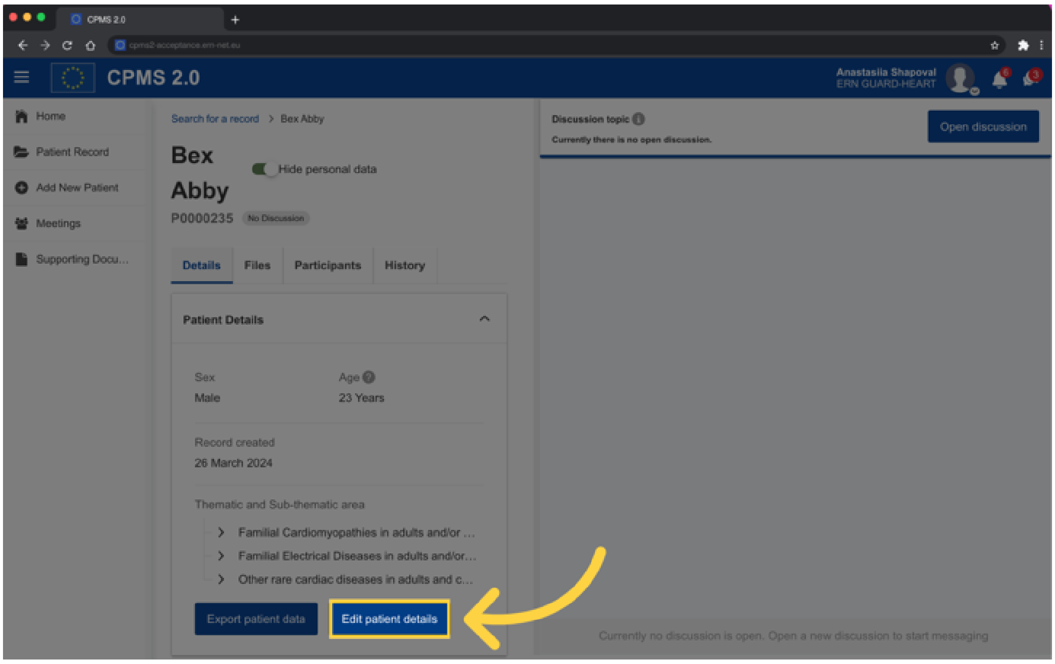
<table>
<tr><td>Step 1</td><td>Log in to the CPMS 2.0 system using your credentials.</td></tr>
<tr><td>Step 2</td><td>Access the "Patient Records" page from the left-hand side menu.

</td></tr>
<tr><td>Step 3</td><td>Navigate to the patient profile for which you want to edit healthcare provider details. You can do this by either searching for the patient's name in the search bar at the top of the page or by browsing through the list of patients on the page.</td></tr>
<tr><td>Step 4</td><td>Under the “Details” tab click on the “Edit healthcare provider details” button.

</td></tr>
</table>

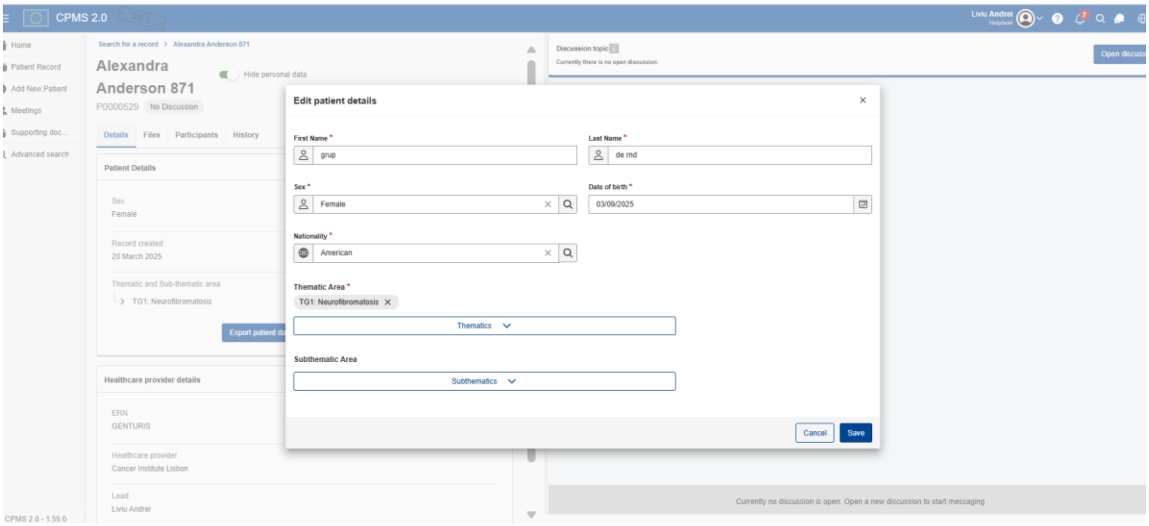
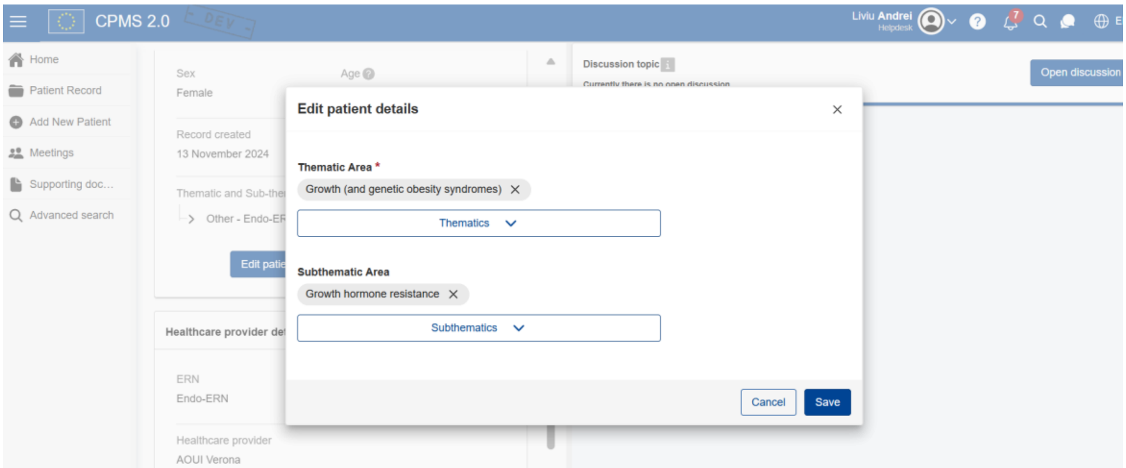
Step 5	Edit field “Lead”. 
Step 6	After all edits are done press on the “Save” button.

9. How can I edit thematic and sub-thematic area?

If you are the patient record creator, record lead, stand-in of any for the previous users or a helpdesk of the ERN in which the patient is enrolled, you can edit thematic and/or sub-thematic area after a patient record is created, by following these step-by-step instructions:

Step 1	Log in to the CPMS 2.0 system using your credentials.

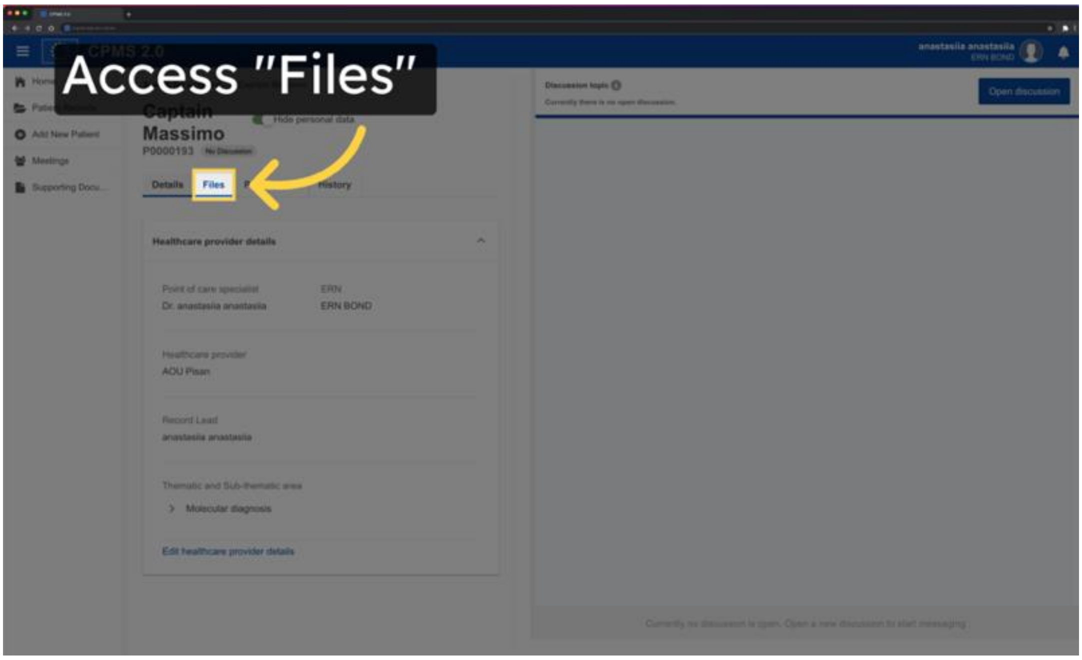
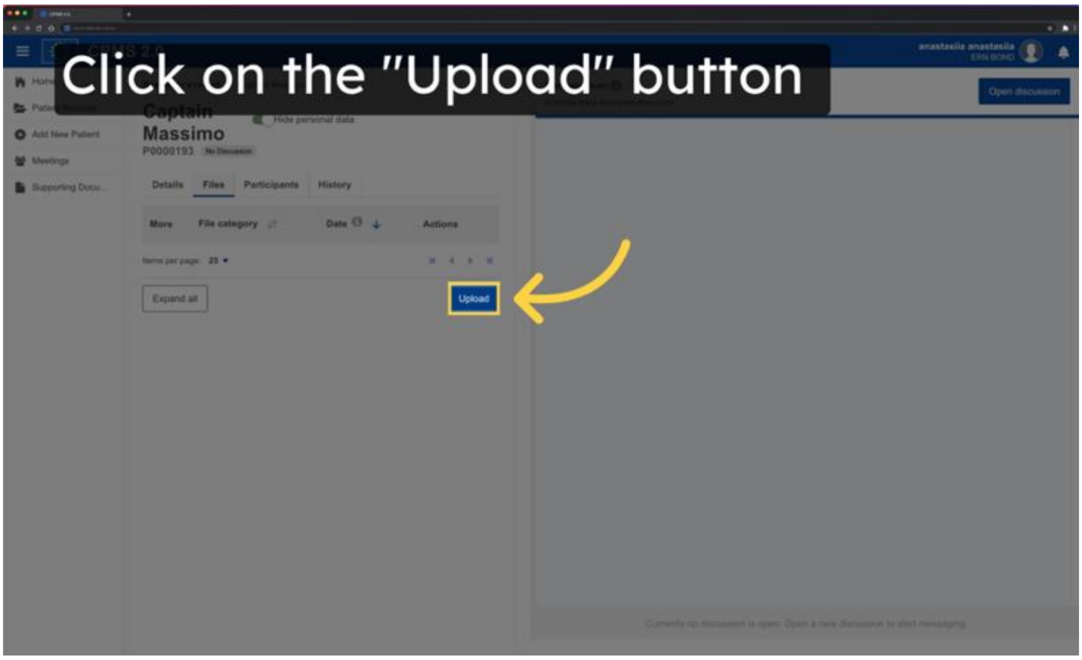
<table>
<tr><td>Step 2</td><td>Access the "Patient Records" page from the left-hand side menu.

</td></tr>
<tr><td>Step 3</td><td>Navigate to the patient profile for which you want to edit patient details. You can do this by either searching for the patient's name in the search bar at the top of the page or by browsing through the list of patients on the page.</td></tr>
<tr><td>Step 4</td><td>Under the “Details” tab click on the “Edit patient details” button.

</td></tr>
</table>

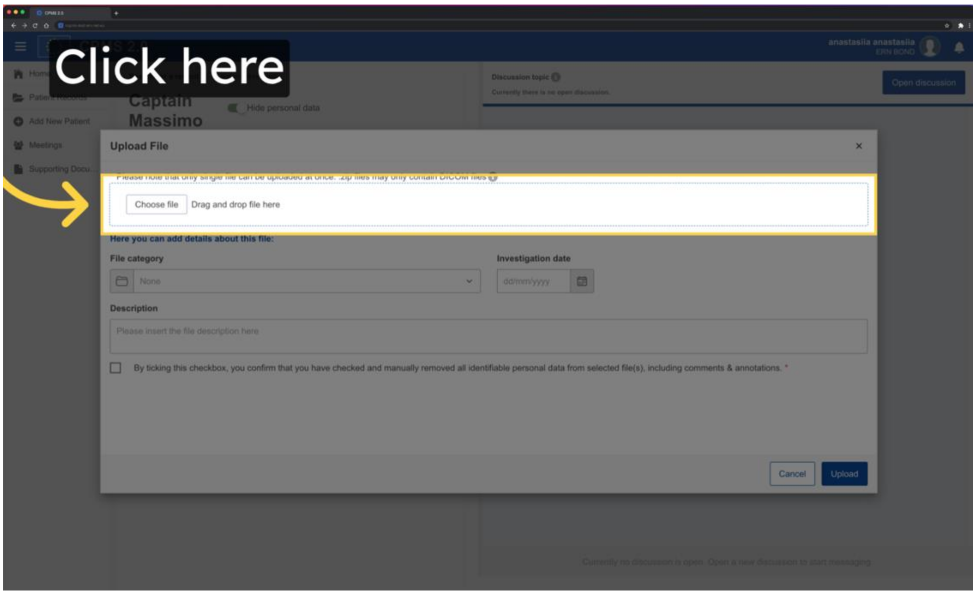
Step 5	Inside the pop-up, edit the thematic and sub-thematic. Fields to fill in in case you are the user who created the record, its stand-in, the patient lead or its stand-in:  Fields to fill in in case you are the helpdesk of the ERN in which the patient is enrolled: 
Step 6	Once you have made all the required edits, click on the "Save" button.

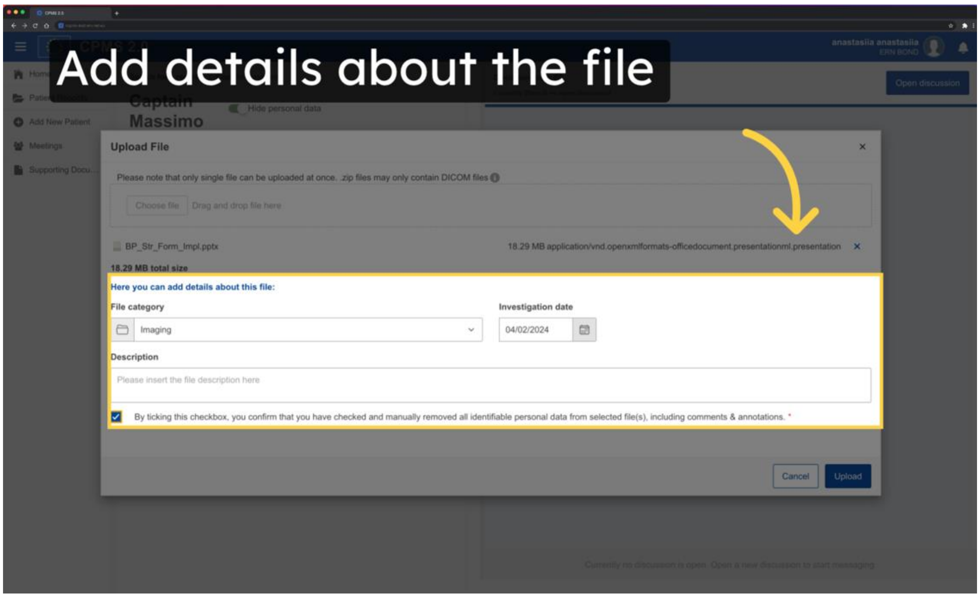
10. How to upload a new file to a patient record?

Please note that patient files are accessible and downloadable by all patient participants. To upload a new file to a patient record, follow these step-by-step instructions:

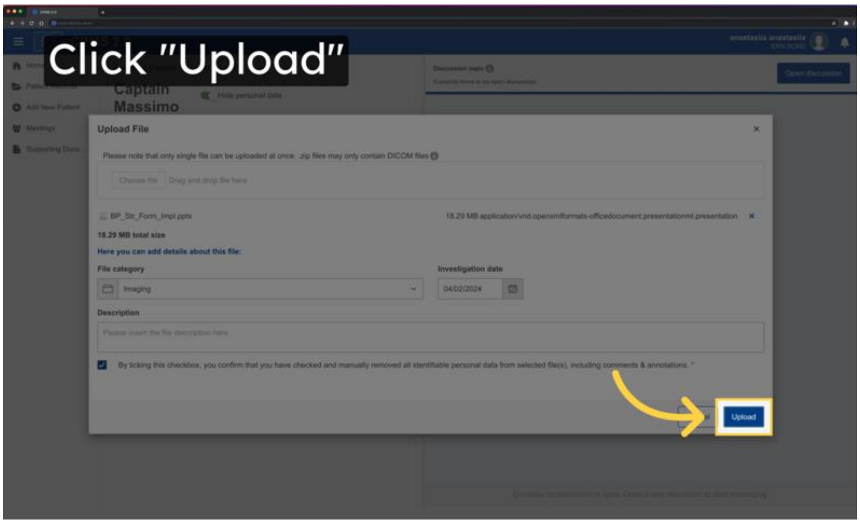
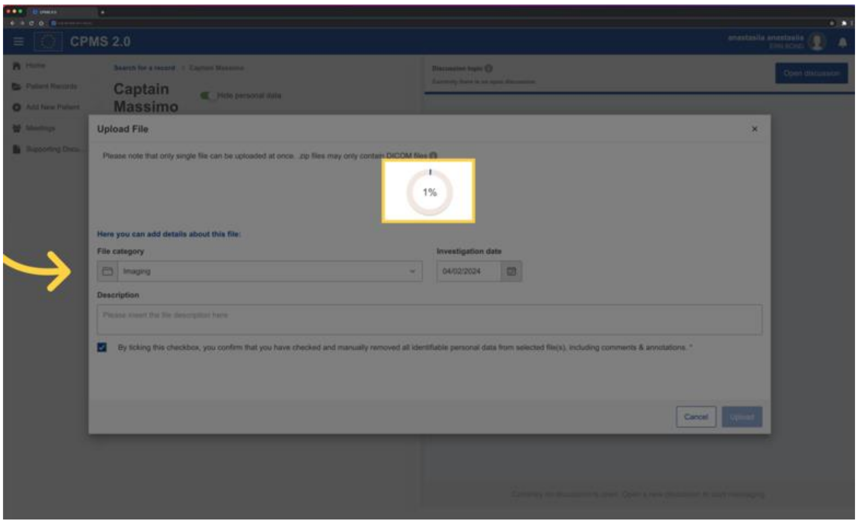
Step 1	Log in to the application using your credentials.

Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Navigate to the patient profile for which you want to view the files. You can do this by either searching for the patient's name in the search bar at the top of the page or by browsing through the list of patients on the page.
Step 4	Once you have accessed the patient's record, go to the "Files" tab. This is where you can view all the files that have been uploaded to the patient's record. 
Step 5	Look for the "Upload File" call-to-action button. This button will be located under the table. Click on the "Upload File" button, and a pop-up will appear. 

<table>
<tr>
<td>Step 6</td>
<td>Click on the "Choose file" button and choose the file you want to upload from your local system. Please note that you are supposed to upload only anonymized files.


</td>
</tr>
<tr>
<td>Step 7</td>
<td>Once the file is selected, you'll be prompted to fill in details such as the file category, investigation date, and a free-text description. Provide accurate information to enhance the context of the uploaded file. Check the disclaimer: “By ticking this checkbox, you confirm that you have checked and manually removed all identifiable personal data from selected file(s), including comments & annotations.”


</td>
</tr>
</table>

Step 8	After completing the file details, initiate the upload process. Press on the “Upload” button. 
Step 9	A progress indicator will inform you about the status of the upload. 
Step 10	Once the upload is successful, you will be redirected to the patient's files tab. The newly uploaded file will be listed among the documents associated with the patient.

11. What file types are supported for uploading?

CPMS 2.0 supports file upload, download and in-app viewers for various formats, including:

- medical images (DICOM - .dcm and .zip);
- PDF documents (.pdf);
- office files (.doc, . docx, .ppt, .pptx);
- images (. jpg, . jpeg, .png, .tiff, .bmp);
- videos (.mp4, .mov);

Following formats can only be uploaded and downloaded (no in app viewers): avi, .eeg, .edf and .trc.

Please note that:

- CPMS 2.0 is performing data anonymization during the upload of DICOM files.
- You can zip several files and/or folder into a single zip file. For details on how to do this, please refer to Zip and unzip files - Microsoft Support.

12. What investigation date refers to?

The term "investigation date" refer to the specific date on which the investigation took place. This is different from the date when the document was uploaded. Knowing the investigation date is important because it helps other clinicians understand the timeline of events during the investigation. It also helps evaluate the reliability and accuracy of the findings and conclusions presented in the document.

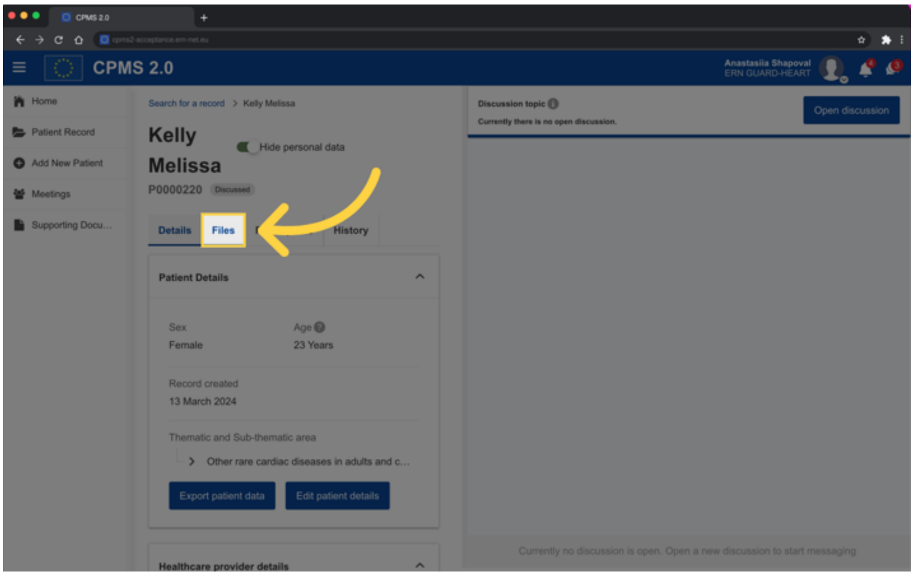
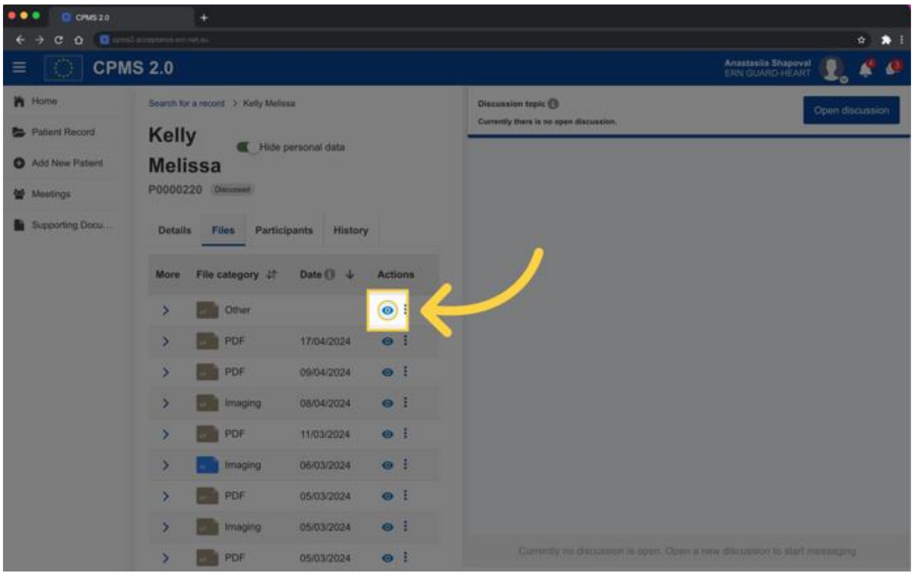
13. Is there a maximum file size for document uploads?

There are certain limitations on the maximum file size that can be uploaded based on your internet browser capabilities and speed of internet connection. For DICOM files, the maximum upload size is 2 GB, while for regular files there is NO maximum upload size.

14. How can I view files inside CPMS 2.0?

To view files of a patient, follow these steps:

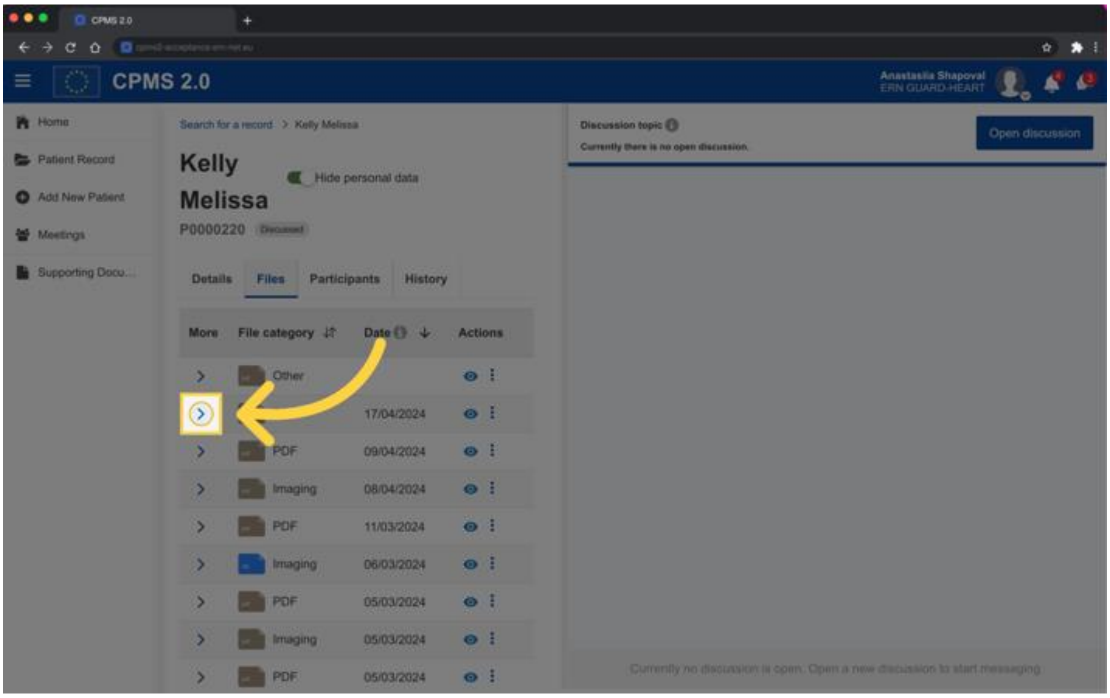
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Navigate to the patient profile for which you want to view files.

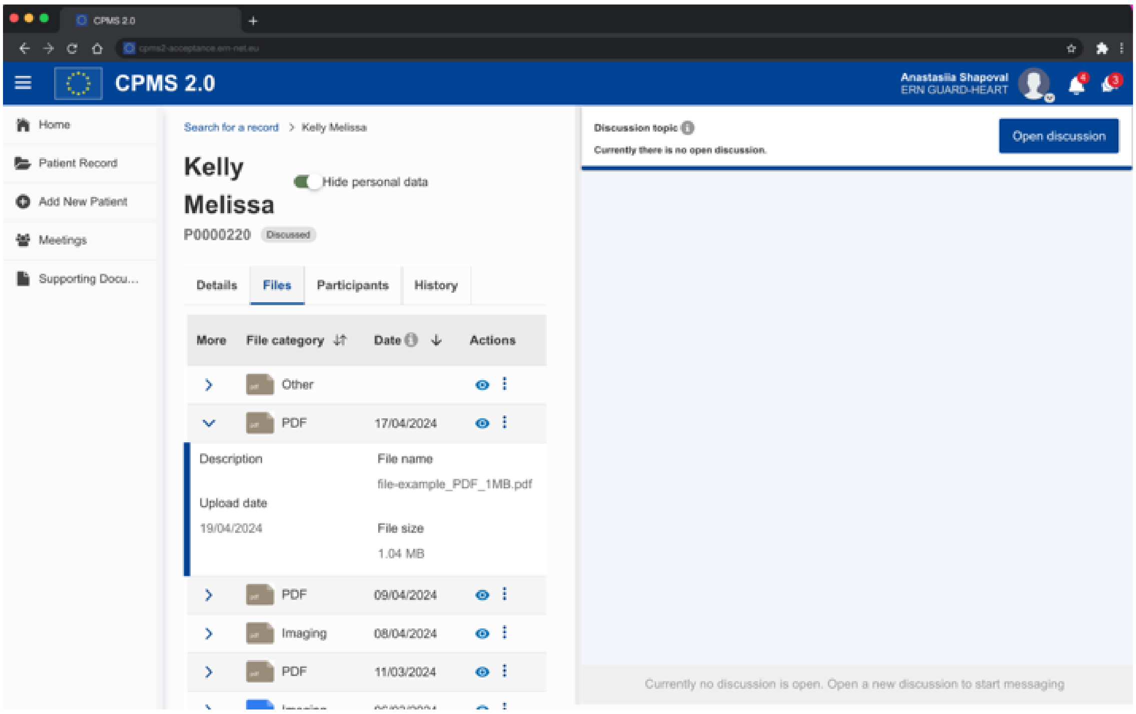
Step 4	Access the “Files” tab within the patient record. 
Step 5	The list of uploaded documents will be displayed, categorized by file type (Imaging, Testing/Lab results, Pathology, Genetic Testing, Reports, Video, PDF, Other).
Step 6	To open a file, click on the “Eye” icon, which will open the file in a new tab. You can then explore the content of each file. 

Each file in the table includes details such as file category, date, and a call to action to view the description and upload date.

15. How can I view file description?

To view the description of a file that has been uploaded to a patient's record, you can follow the below steps:

Step 1	Log in to the application using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Navigate to the patient profile for which you want to view the files. You can do this by either searching for the patient's name in the search bar at the top of the page or by browsing through the list of patients on the page.
Step 4	Once you have accessed the patient's record, go to the "Files" tab. This is where you can view all the files that have been uploaded to the patient's record.
Step 5	Look for the file you want to know the description for and click on the "More" arrow located in the "More" column. This will open a drop-down menu that contains additional information about the file. 

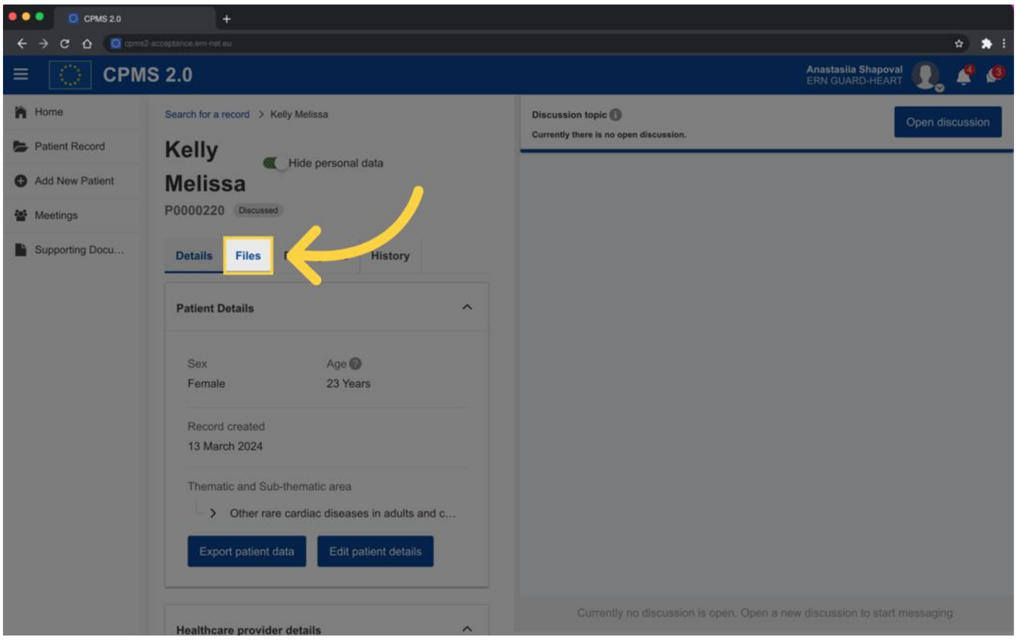
<table>
<tr><td>Step 6</td><td>The file description, including the upload date, will be visible on the screen. You can now read the description to get a better understanding of what the file contains.
</td></tr>
</table>

16. How to download a file from a patient record?

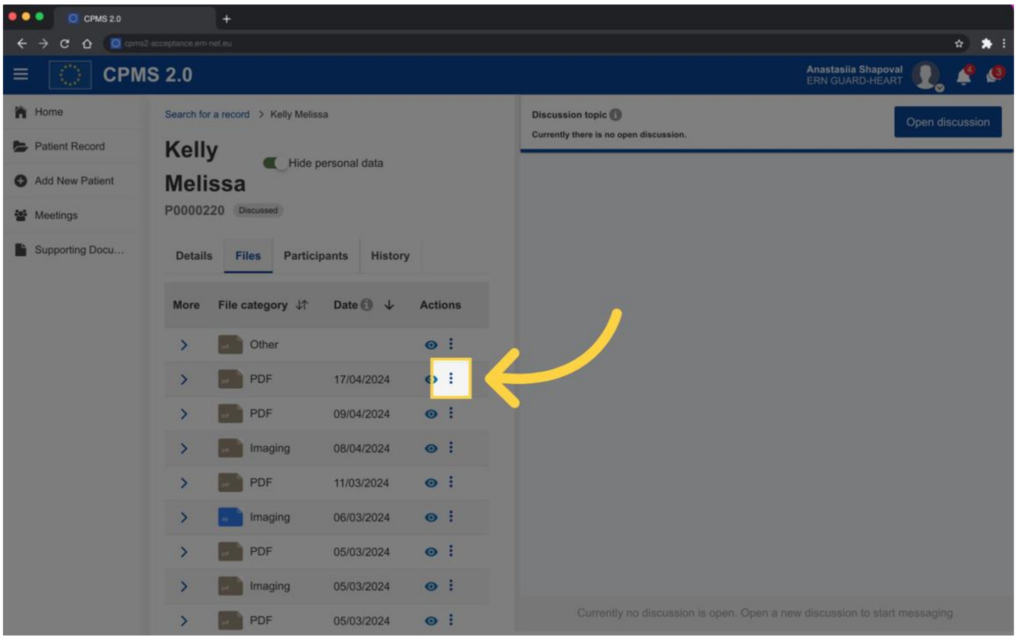
To download a file from a patient record, follow these step-by-step instructions:

Step 1	Log in to the application using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Navigate to the patient profile for which you want to view the files. You can do this by either searching for the patient's name in the search bar at the top of the page or by browsing through the list of patients on the page.

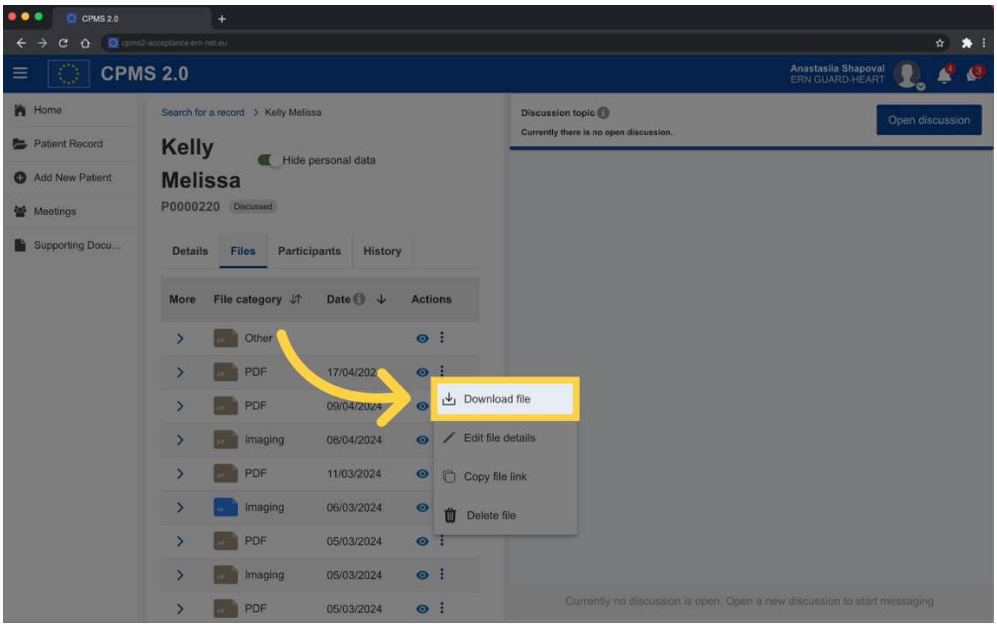
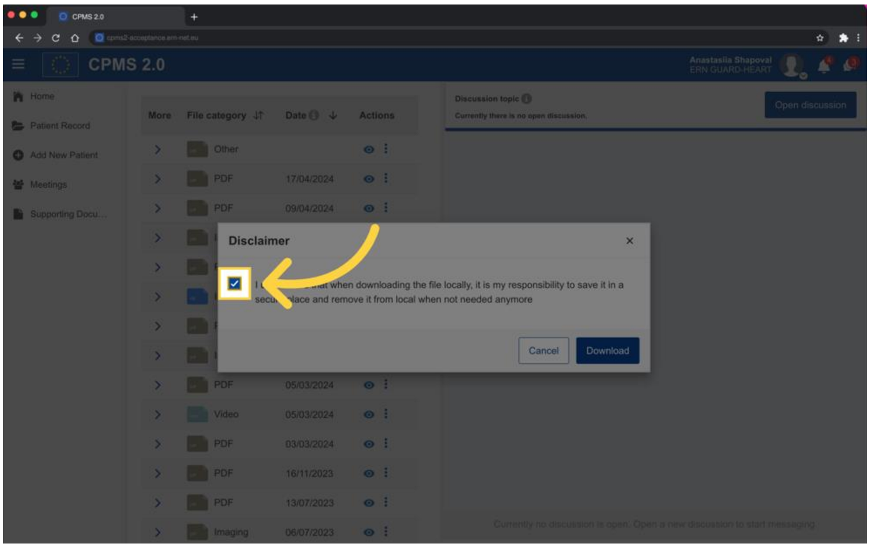
<table>
<tr>
<td>Step 4</td>
<td>Once you have accessed the patient's record, go to the "Files" tab. This is where you can view all the files that have been uploaded to the patient's record.



</td>
</tr>
<tr>
<td>Step 5</td>
<td>Find the file you want to download and click on the three dots located in the "Actions" column.



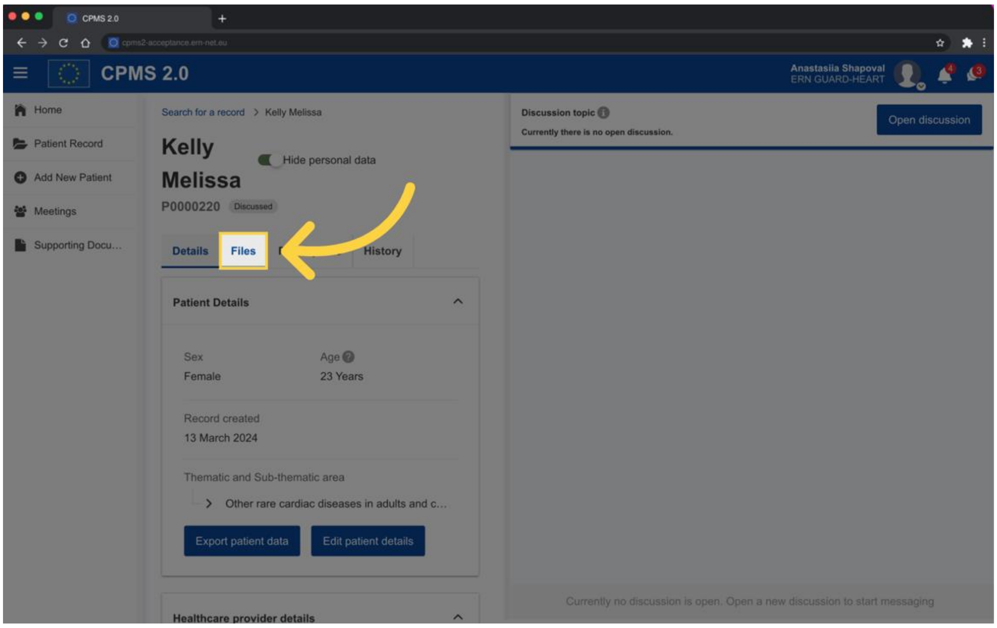
</td>
</tr>
</table>

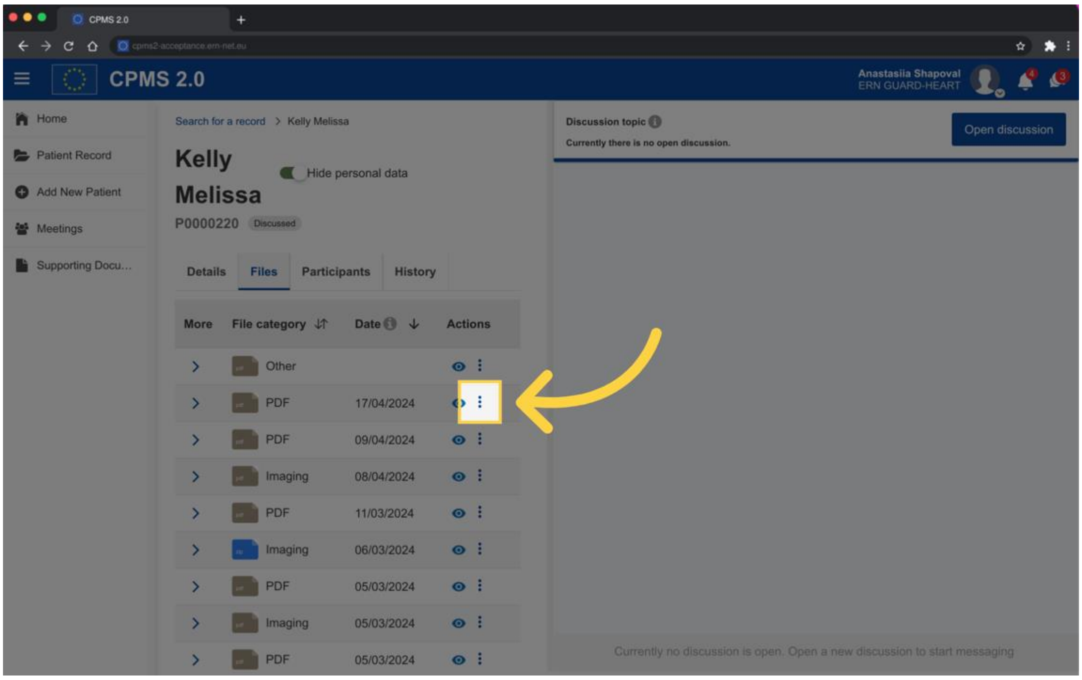
Step 6	A pop-up window will appear with various options. Click on the "Download file" button. 
Step 7	Before proceeding with the download, a pop-up window will remind you of your responsibility for the security of locally downloaded files. Make sure you understand and accept these responsibilities.
Step 8	Check the disclaimer: “I understand that when downloading the file locally, it is my responsibility to save it in a secure place and remove it from local when not needed anymore”. 
Step 9	Click on the "Download" button to confirm your understanding and acceptance of the security responsibilities.
Step 10	The file download will start, and you may be able to track its progress. Once the download is complete, the file will be saved to your computer.

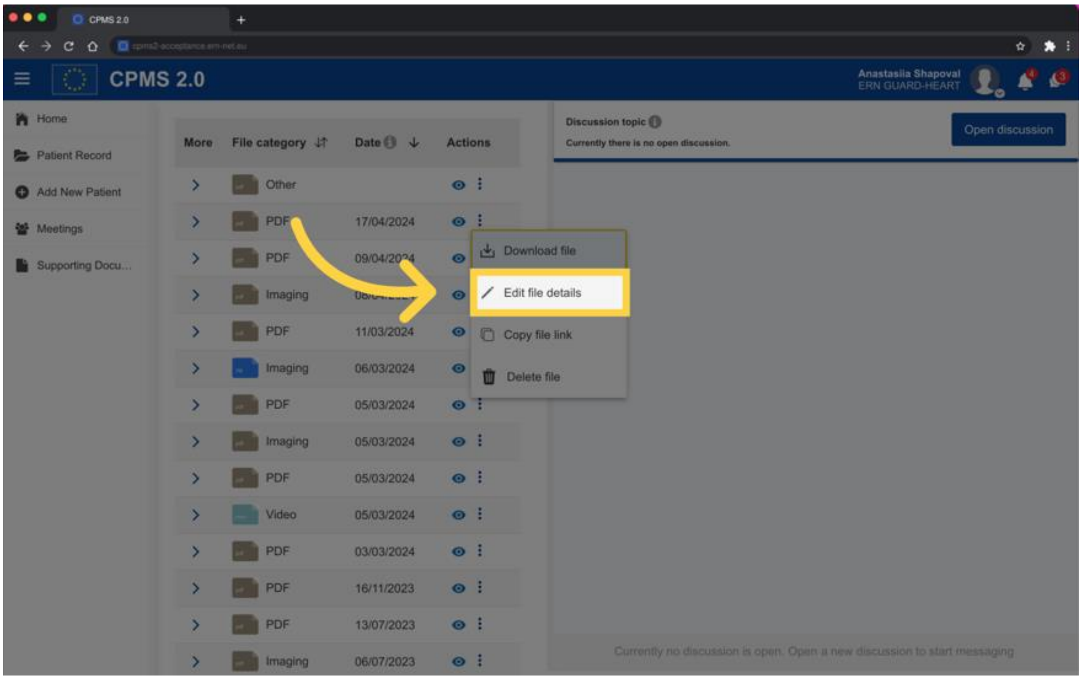
Please note that you can download zip files for images/Dicom. The download time will depend on your bandwidth and the file size.

17. How can I edit file details?

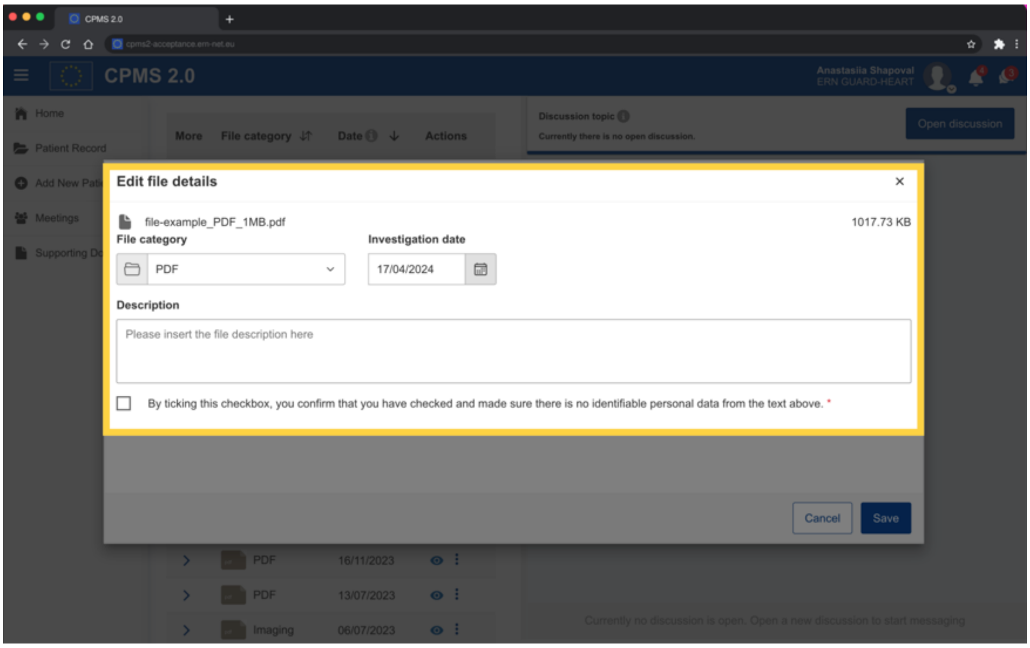
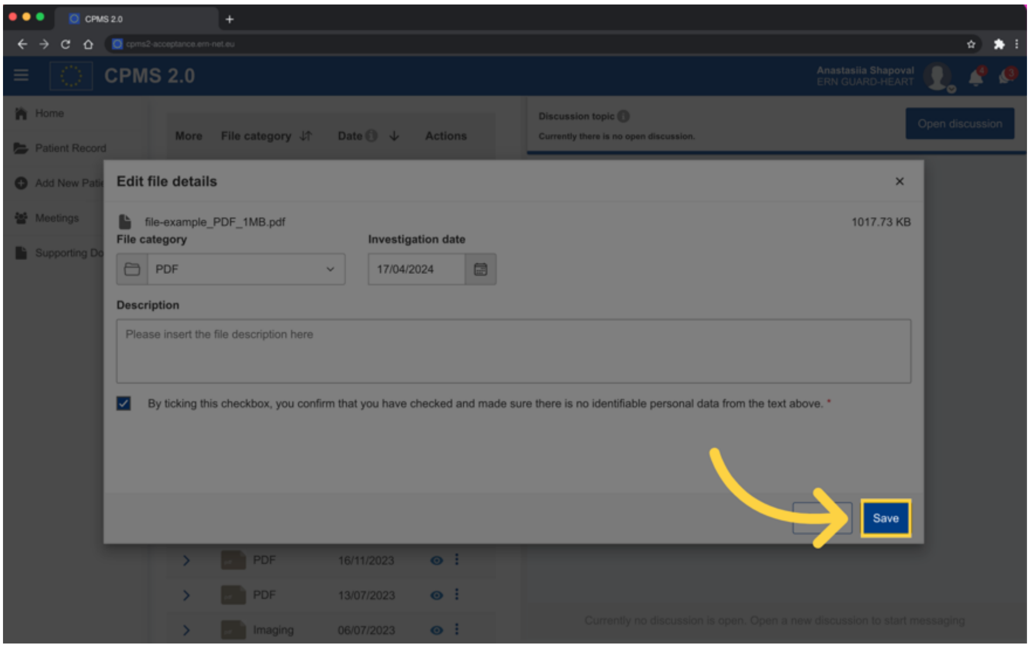
To edit a file from a patient record, follow these step-by-step instructions:

Step 1	Log in to the application using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Navigate to the patient profile for which you want to view the files. You can do this by either searching for the patient's name in the search bar at the top of the page or by browsing through the list of patients on the page.
Step 4	Once you have accessed the patient's record, go to the "Files" tab. This is where you can view all the files that have been uploaded to the patient's record. 

<table>
<tr>
<td>Step 5</td>
<td>Find the file you want to download and click on the three dots located in the "Actions" column.


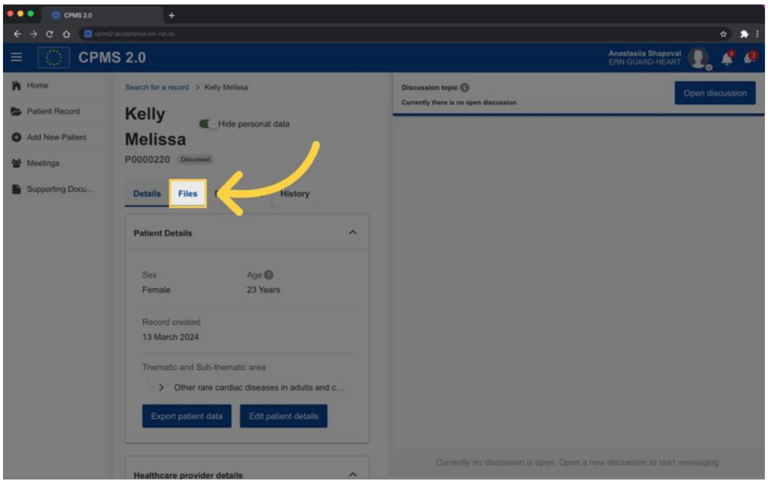
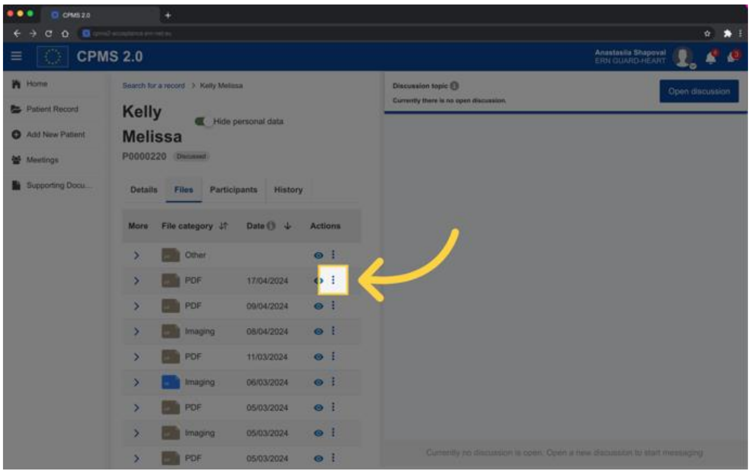
</td>
</tr>
<tr>
<td>Step 6</td>
<td>A pop-up window will appear with various options. Click on the "Edit file details" button.


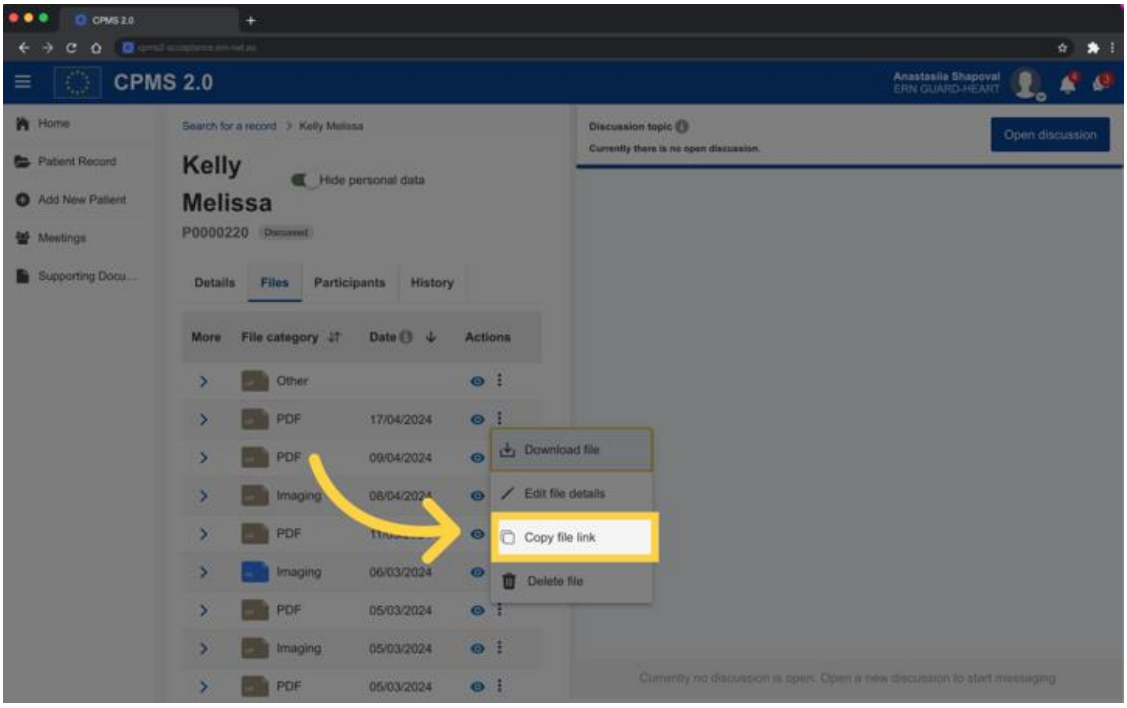
</td>
</tr>
</table>

Step 7	A pop-up will appear, allowing you to edit information such as file category, investigation date, and description. 
Step 8	Save the changes, and the updated details will be visible in the patient's files tab. 

18. How do I copy a link to a specific file?

Please note that the link you copy will only be accessible to patient's participants who have logged in to CPMS 2.0. If you need to share a link to a specific file in CPMS 2.0 with other clinicians, you can easily copy the link using the following steps:

Step 1	Log in to the application using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Navigate to the patient profile for which you want to view files.
Step 4	Access the "Files" tab within the patient record. 
Step 5	Look for the file you want to copy the link for and click on the three dots in the "Actions" column. 

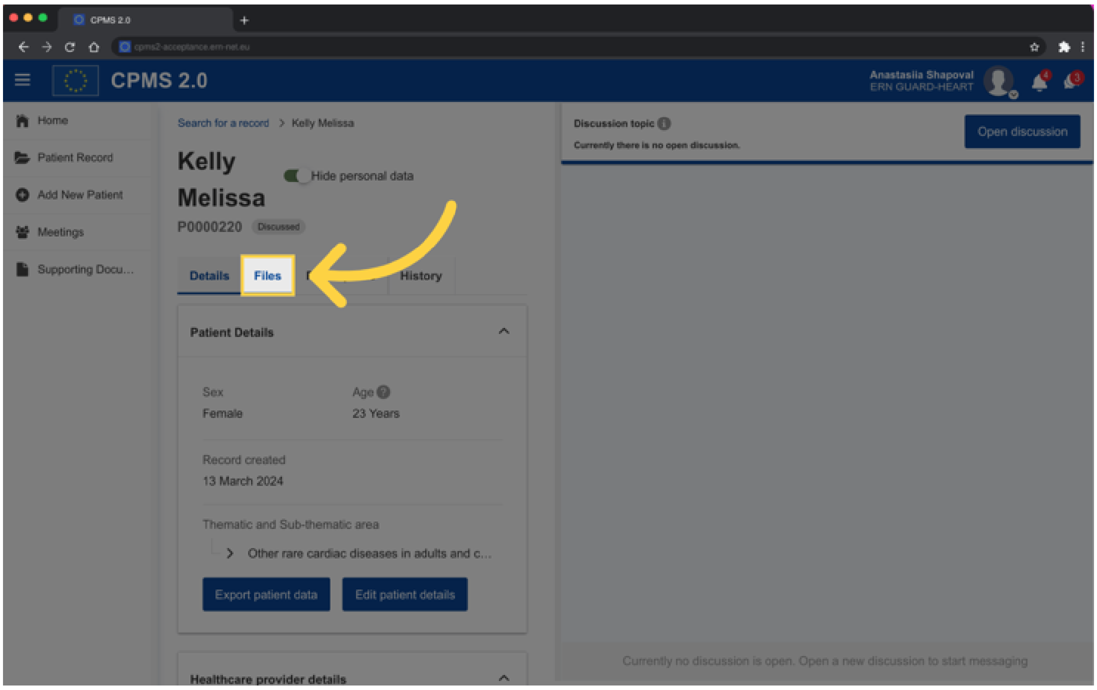
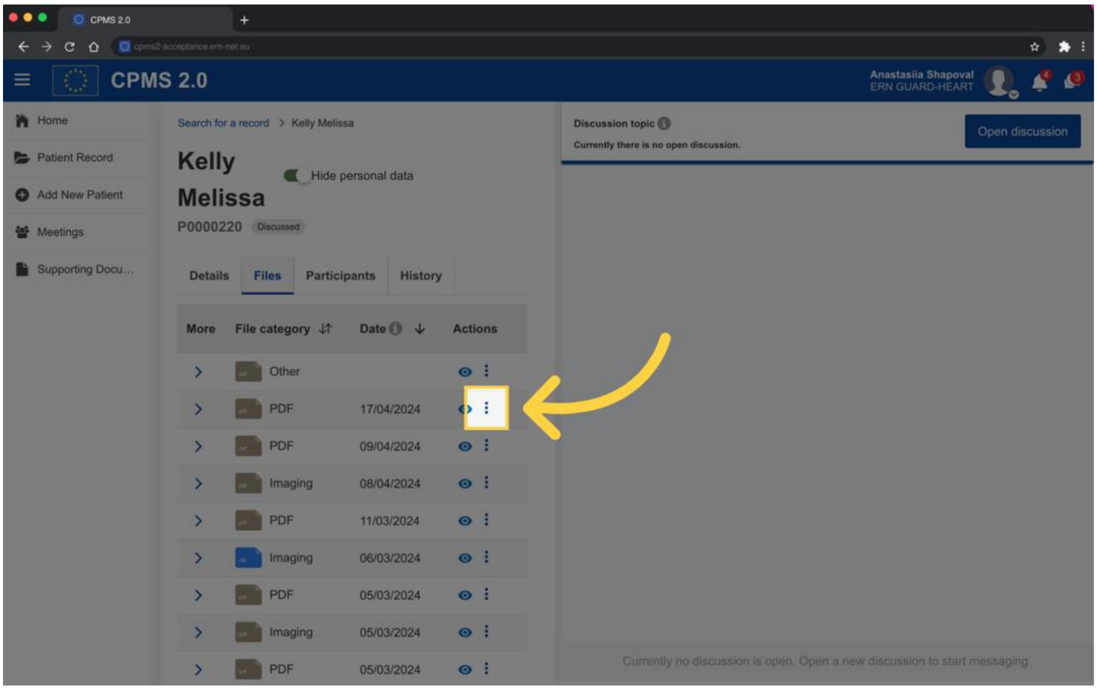
<table>
<tr><td>Step 6</td><td>A pop-up will appear with different options. Click on the "Copy File Link" button associated with the file.

</td></tr>
<tr><td>Step 7</td><td>A success message will appear, confirming that the file link has been copied.</td></tr>
</table>

You can now share this link with other clinicians through discussions for reference.

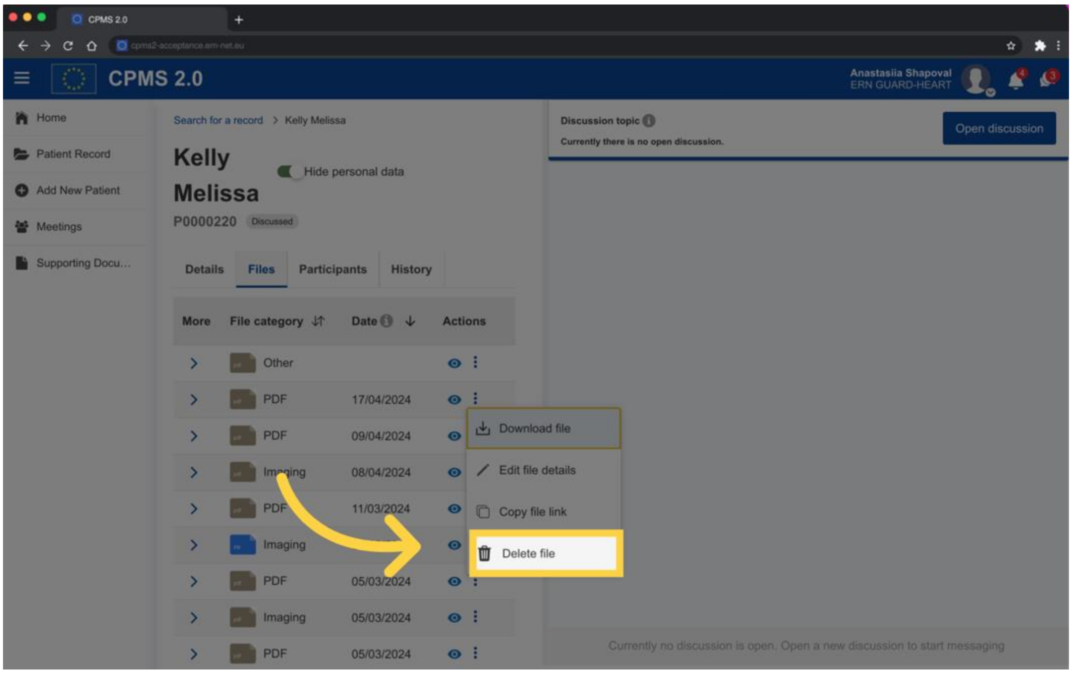
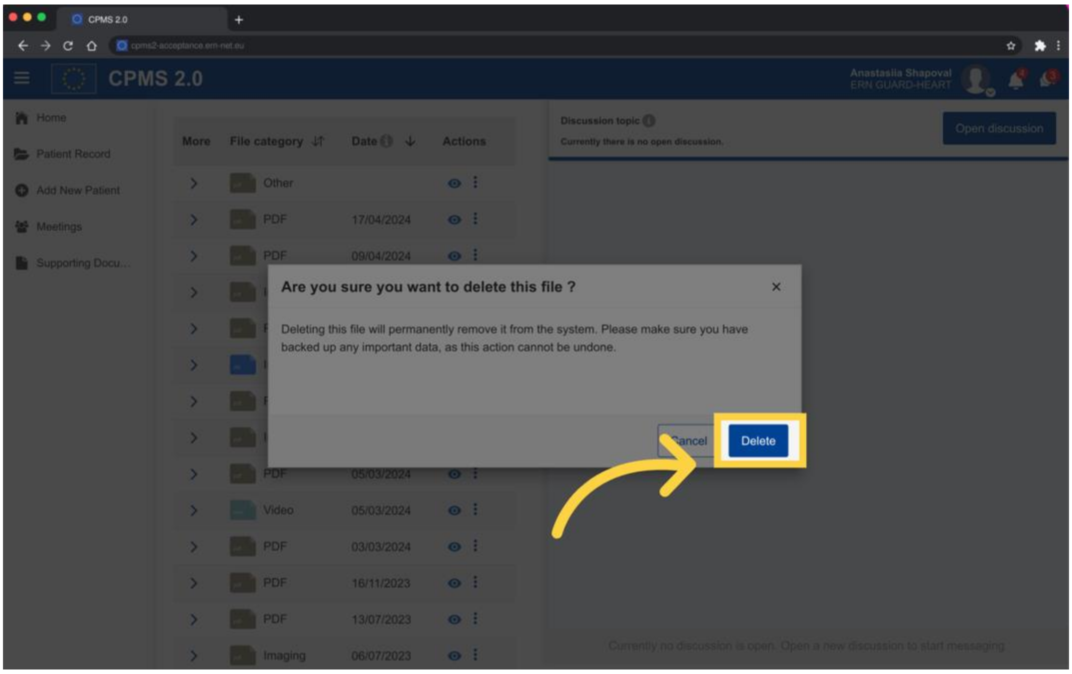
19. How can I delete a file?

To delete a file from a patient record, follow these step-by-step instructions:

Step 1	Log in to the application using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Navigate to the patient profile for which you want to view files.

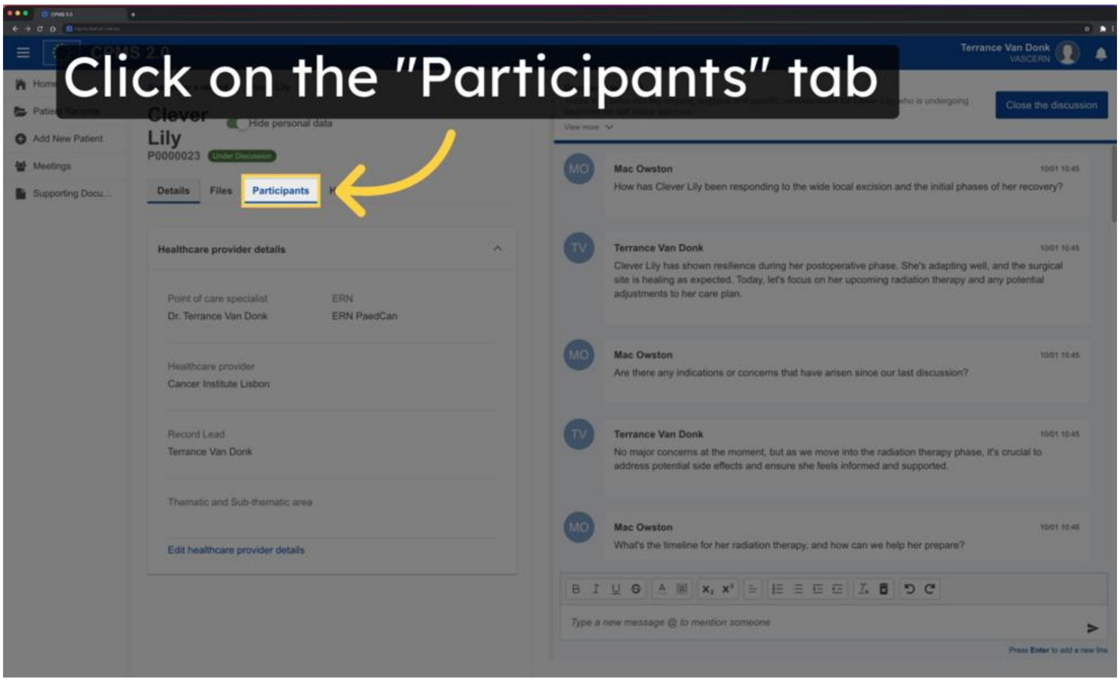
<table>
<tr>
<td>Step 4</td>
<td>Access the "Files" tab within the patient record.

</td>
</tr>
<tr>
<td>Step 5</td>
<td>Look for the file you want to delete and click on the three dots in the "Actions" column.


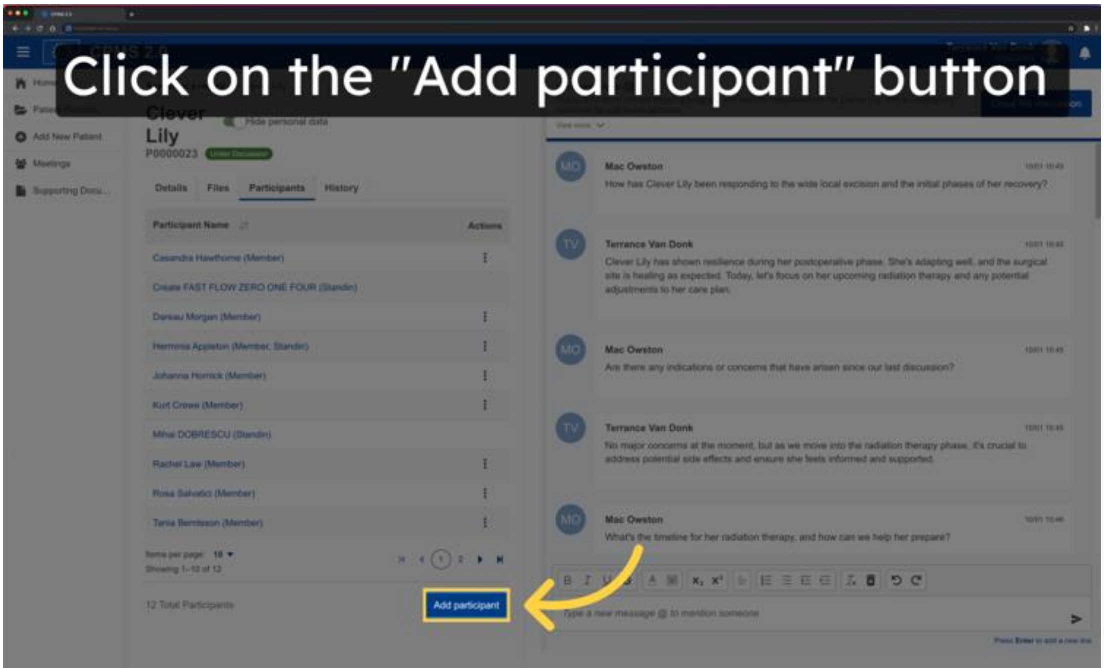
Note that the user who created the patient record, the patient lead, their stand-ins and the helpdesk of the ERN in which the patient is enrolled can delete any file on the patient. The other members can delete only the files updated by themselves or by their own assistants.</td>
</tr>
</table>

Step 6	A pop-up will appear with different options. Click on the "Delete file" button associated with the file. 
Step 7	Click on the “Delete” button to confirm that you want to delete file. 
Step 8	A success message will appear, confirming that the file has been deleted.

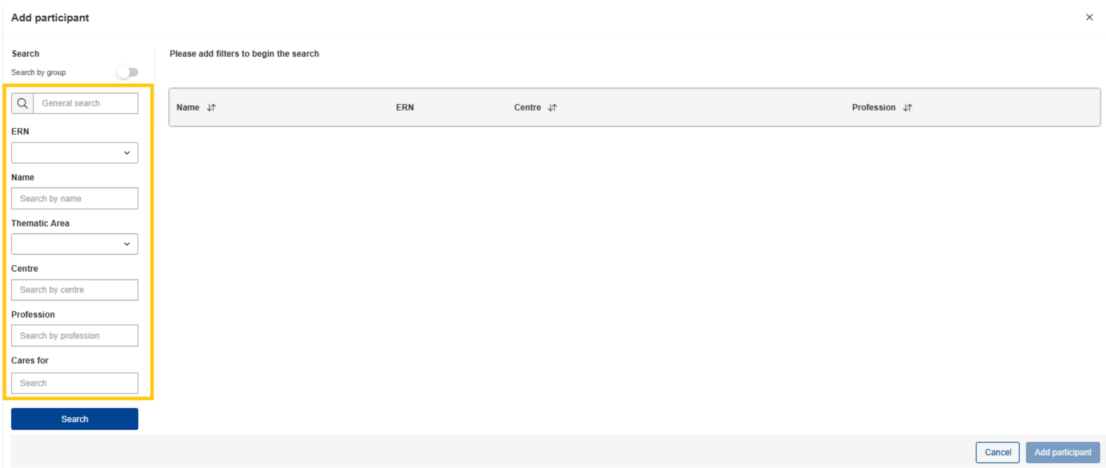
20. How to add a participant to a patient discussion?

If you are the lead, follow these steps to add a participant to a patient discussion:

<table>
<tr>
<td>Step 1</td>
<td>Log in to your account and access the patient profile you want to add a participant to. Once you are in the patient profile, go to the "Participants" tab.


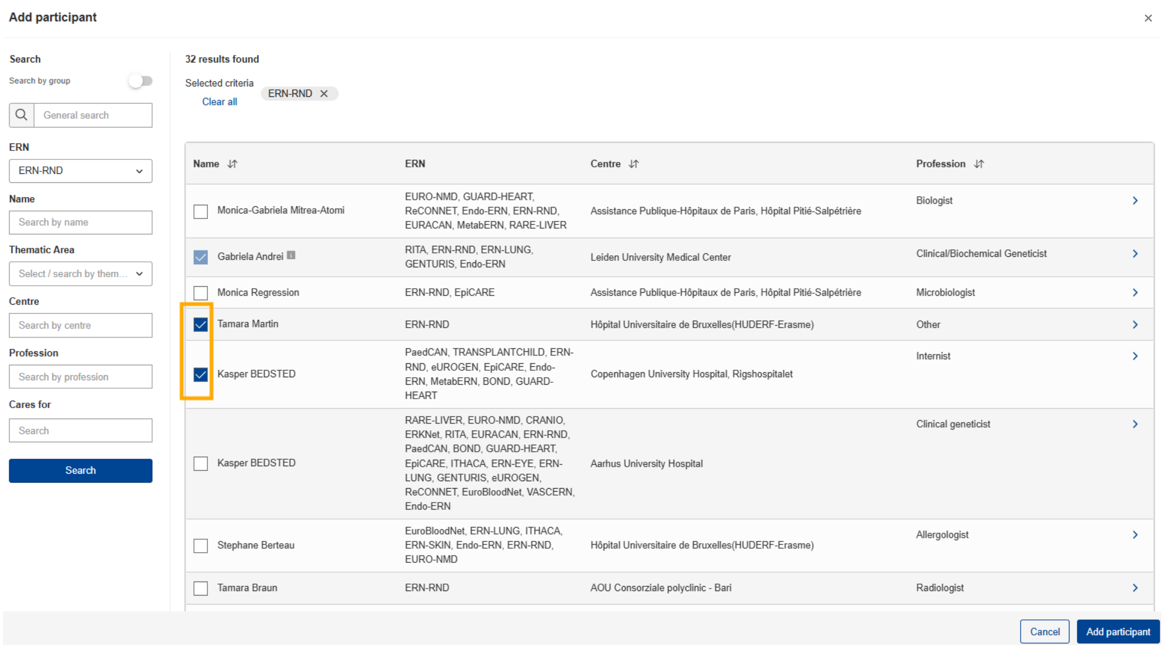
</td>
</tr>
<tr>
<td>Step 2</td>
<td>Click on the "Add Participant" button to start the search process. This will take you to the search panel.


</td>
</tr>
</table>

Step 3	To find the right experts to participate in a discussion, you can search across all European Reference Networks (ERNs). The search panel allows you to refine your search by selecting from the following options: - Search by group: Check the toggle to view list of groups. When searching by groups, you can limit your search to the groups with the same ERN(s) as yours, to all groups that are ERN-specific and/or to all cross-ERN groups. - General search: Searches is all characteristics of a user (first and last name, email, EULogin user name, language, country, timezone, thematics, subthematics, clinical focus, ERN, HCP, roles, profession). The “+” symbol can be used to search for multiple criteria- ERN (European Reference Network): Choose the specific ERN from the drop-down menu. - Name (First or Last Name): Enter the clinician's name in the text field. - Thematic Area: Select the thematic area from the drop-down menu. If you have previously filtered by ERN, only the related thematic areas will be displayed. - Center: Enter the center's name in the text field to find clinicians from a specific medical center. - Profession: Choose the profession from the drop-down menu to find clinicians based on their roles. 
Step 4	Once you have input your search criteria, the system will display a list of clinicians matching the specified criteria. Review the list to find the colleague you want to add.

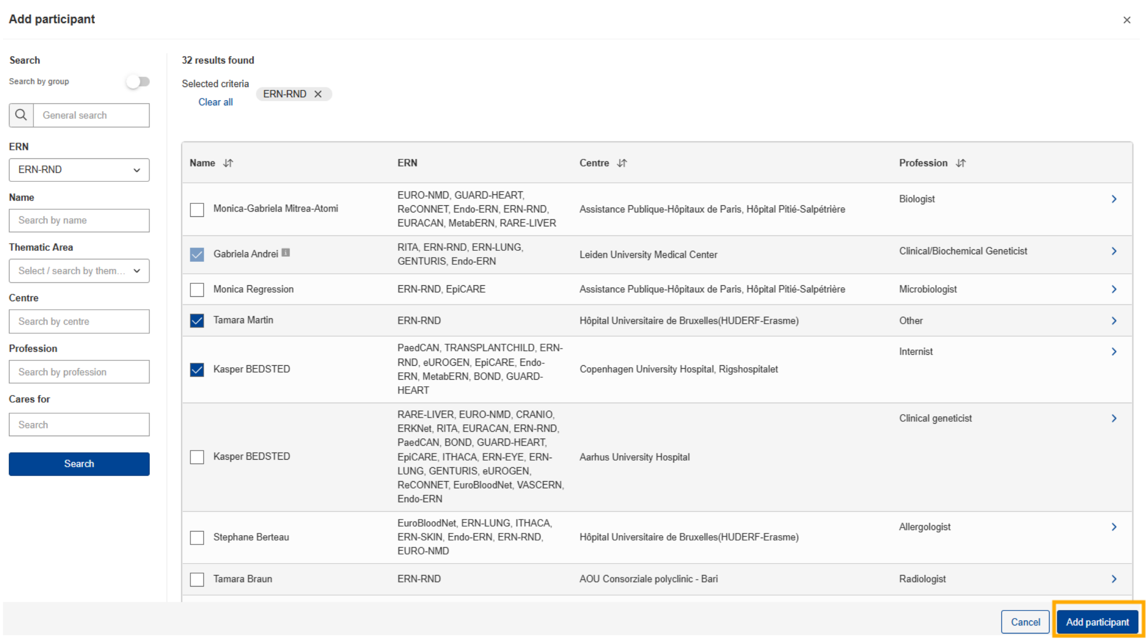
Step 5

Select the colleague you want to add from the list.



Step 6

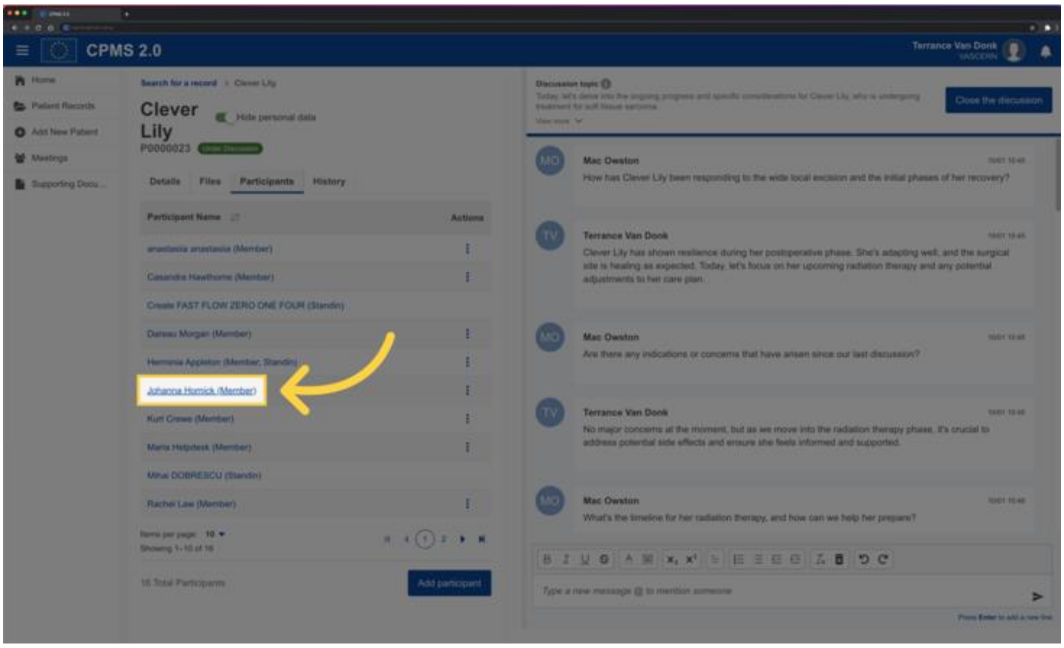
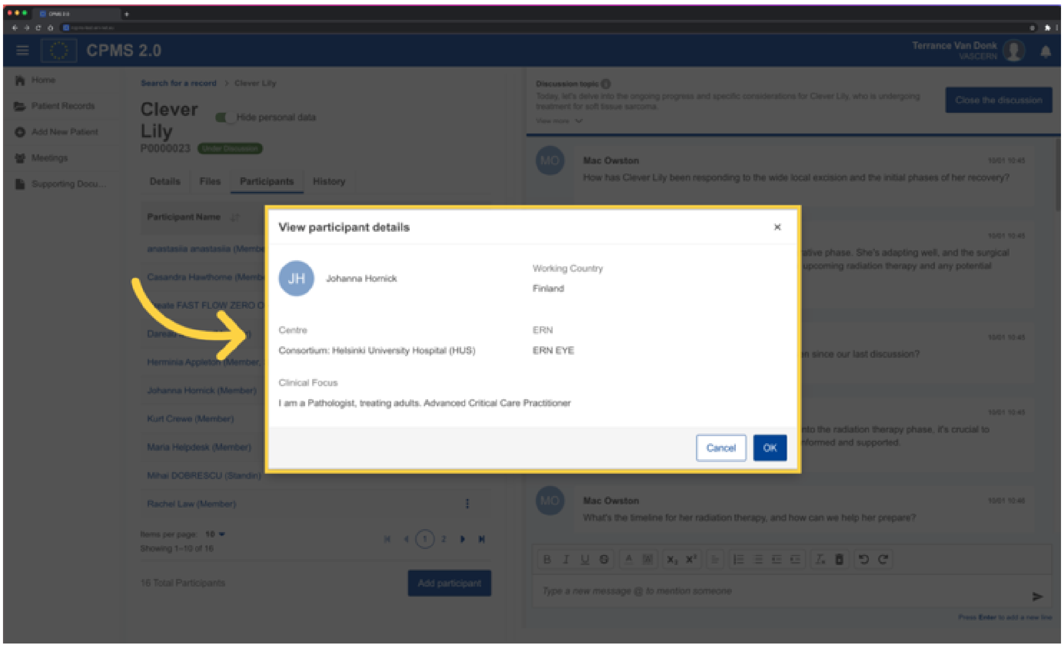
Click the "Add Participant" button.



21. How to view the details of a participant in a patient discussion?

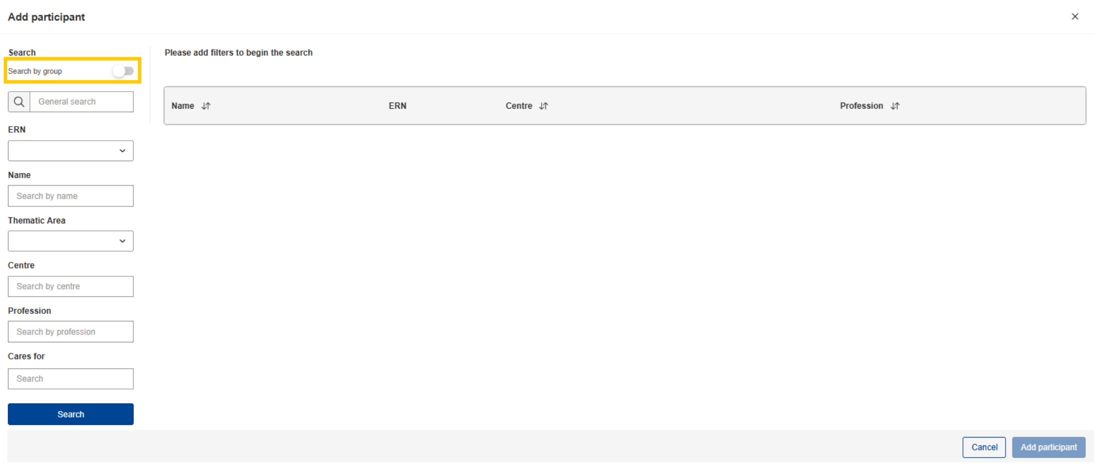
Here are the steps to view the details of a participant in a patient discussion:

Step 1	Log in to your account and access the patient profile you want to add a participant to.
Step 2	Click on the "Participants" tab within the patient profile.

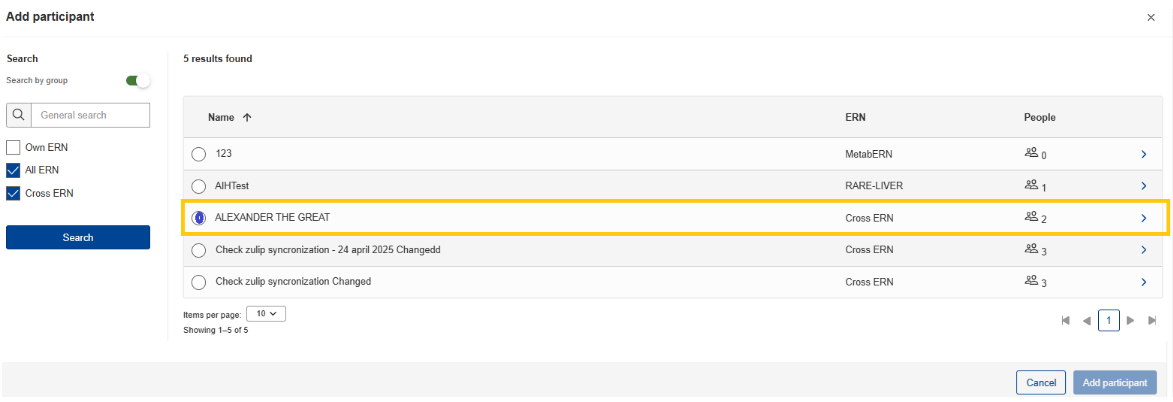
Step 3	Look at the list of participants who are already engaged in the patient discussion.
Step 4	Click on the name of the participant whose details you wish to explore further. 
Step 5	Upon selecting a participant, a detailed pop-up window will appear with a comprehensive set of information. This includes the participant's full name, job role, center, expertise, working country, and clinical focus. 

22. How to add a group of participants to the patient record?

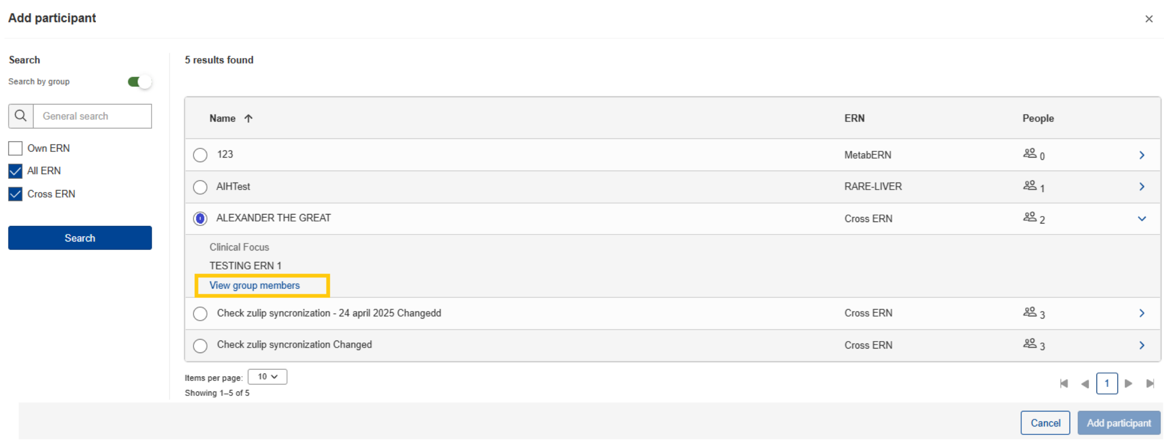
If you are the lead and looking to add a group of participants to the patient record in the CPMS 2.0, follow the steps below:

Step 1	Log in to your account and access the patient profile you want to add a group of participants to.
Step 2	Click on the "Participants" tab within the patient profile to manage and add participants to the patient discussion.
Step 3	Click on the "Add Participant" button to start the search process. This will take you to the search panel.
Step 4	Use the toggle to switch to the group search mode, allowing you to search for and add an entire group of participants to the patient record. You can limit your search to the groups with the same ERN(s) as yours, to all groups that are ERN-specific and/or to all cross-ERN groups. 

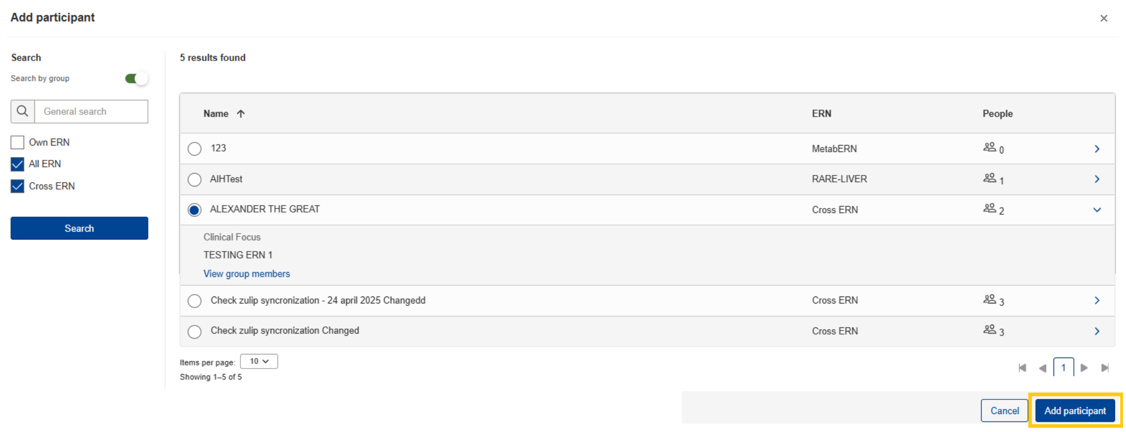
<table>
<tr>
<td>Step 5</td>
<td>
Select the group you want to add. This ensures that you are adding participants from a specific group to enhance collaboration. Please note that you can select groups from your own ERN’s and cross-ERN groups if needed.



</td>
</tr>
<tr>
<td>Step 6</td>
<td>
Press the button "View group members" to explore the members of the selected group to assess their expertise and qualifications. This step ensures that the group members are suitable for inclusion in the patient discussion.

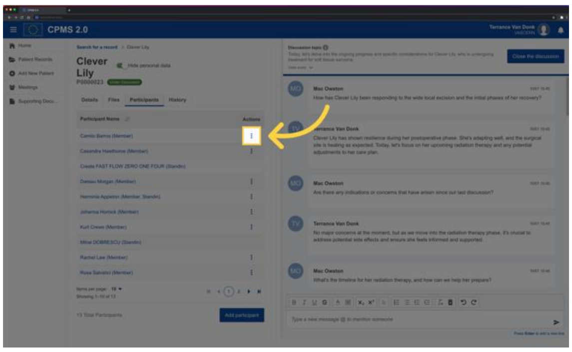


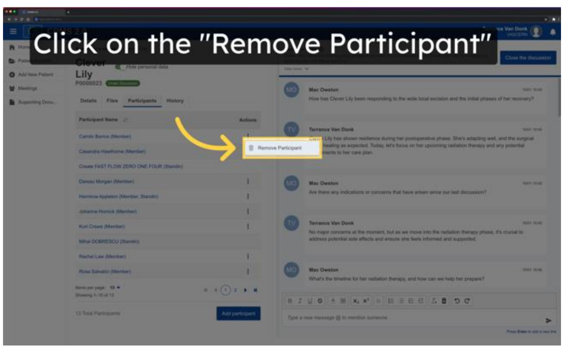
</td>
</tr>
</table>

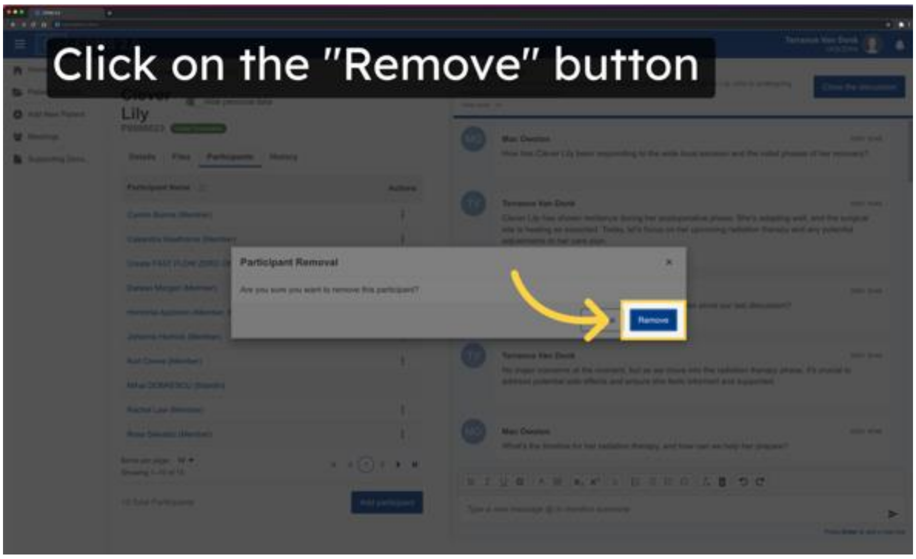
<table>
<tr><td>Step 7</td><td>Click "Add participant" to seamlessly include all members of the selected group in the patient discussion. Please note that you can decide to remove people from the group and add additional participants.

</td></tr>
</table>

23. How to remove a participant?

If you're a lead and need to remove a participant from a patient discussion, here are the steps you need to follow to remove a participant:

<table>
<tr><td>Step 1</td><td>Log in to the CPMS 2.0 system using your credentials. Once you access your account, navigate to the patient profile from which you want to remove a participant.</td></tr>
<tr><td>Step 2</td><td>Click on the "Participants" tab within the patient profile.</td></tr>
<tr><td>Step 3</td><td>After accessing the "Participants" tab, identify the participant you intend to remove from the discussion. The list of participants will include their name.</td></tr>
<tr><td>Step 4</td><td>Click on the "Remove Participant" option after pressing three dots located next to the name of the participant you want to exclude.


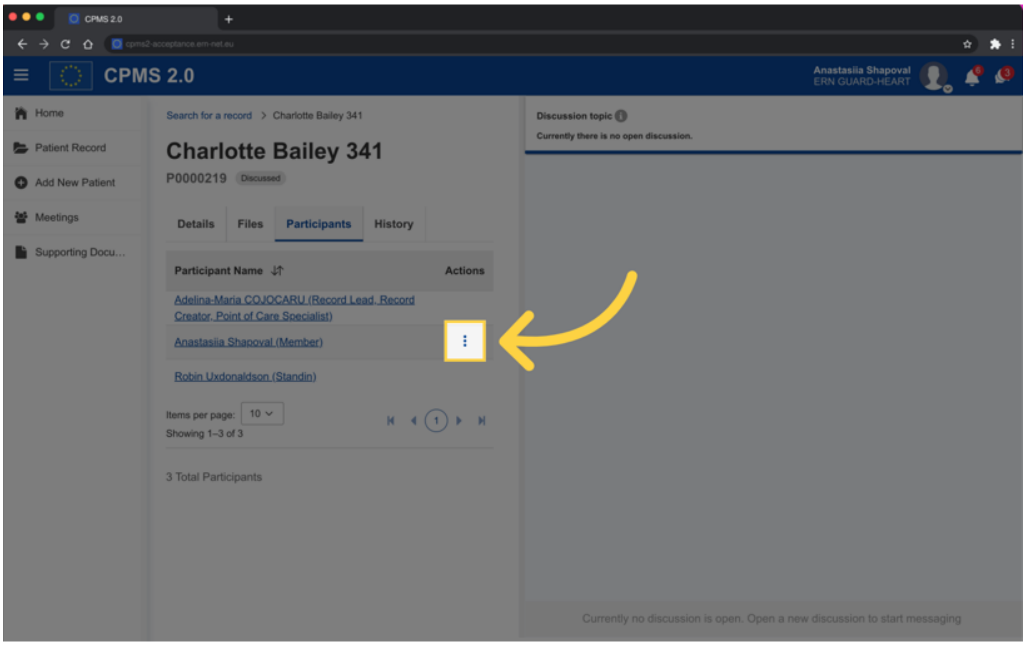
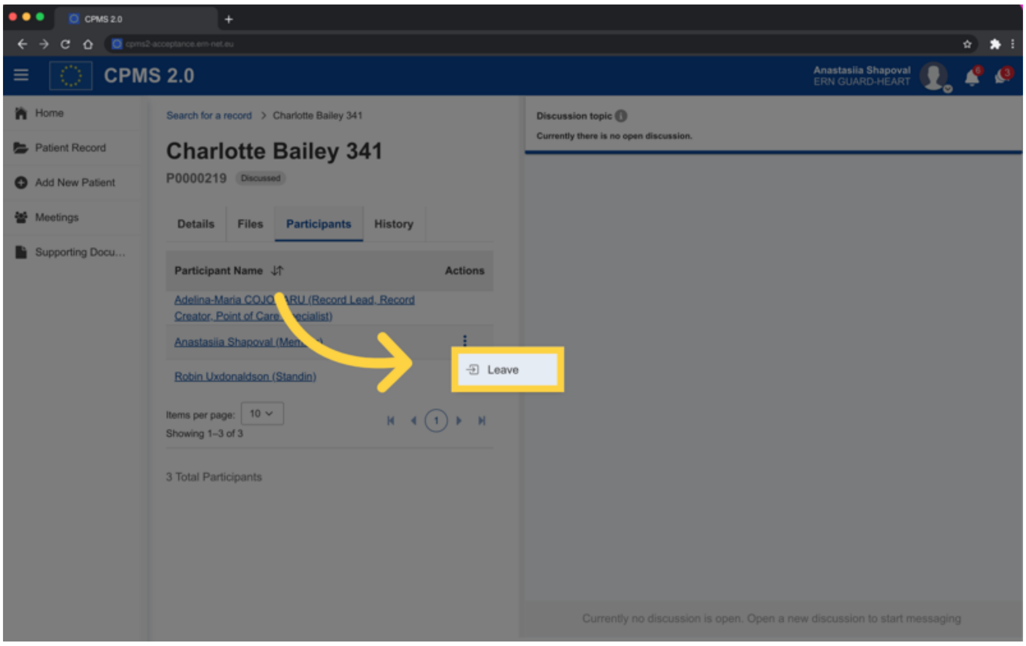

</td></tr>
<tr><td>Step 5</td><td>A confirmation pop-up will appear, providing details about ongoing discussions if applicable.</td></tr>
</table>

Step 6	Review the information in the confirmation pop-up carefully. If you are sure that you want to remove the participant, click on the "Remove" option in the pop-up to proceed with the removal process. 
Step 7	Once you've confirmed the removal, the participant will no longer appear in the list of participants for that patient record. This means they can no longer access the discussion.

24. How to leave a patient record?

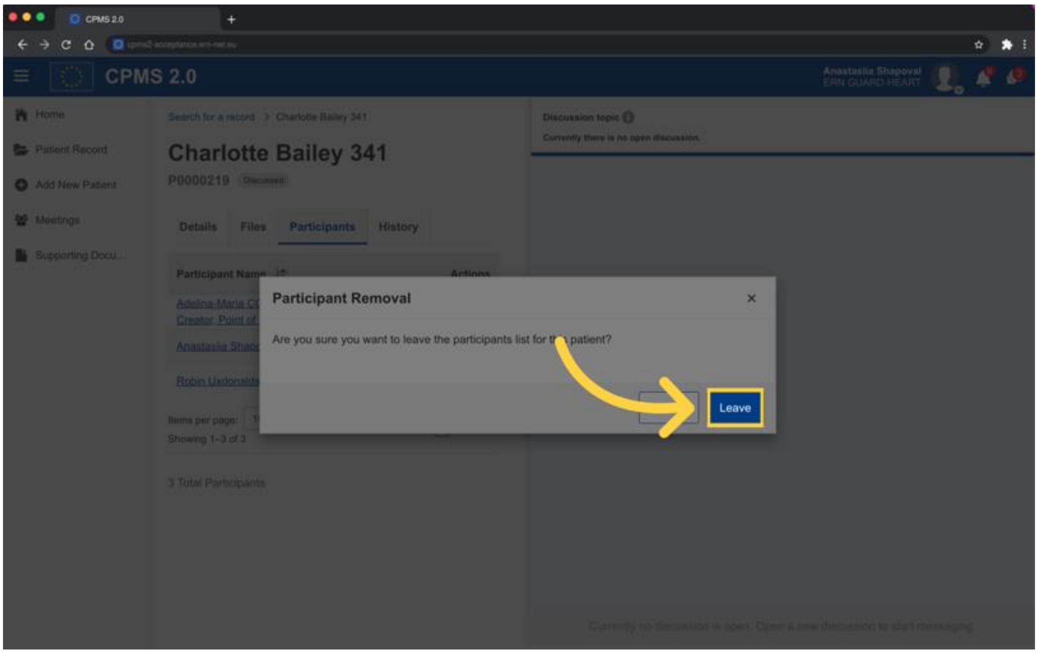
To leave a patient record, please follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials. Once you access your account, navigate to the patient record from which you want to leave.
Step 2	Click on the "Participants" tab within the patient profile.

Step 3	After accessing the "Participants" tab, click on the three dots. 
Step 4	Click on the "Leave" option after pressing three dots located next to your name. 

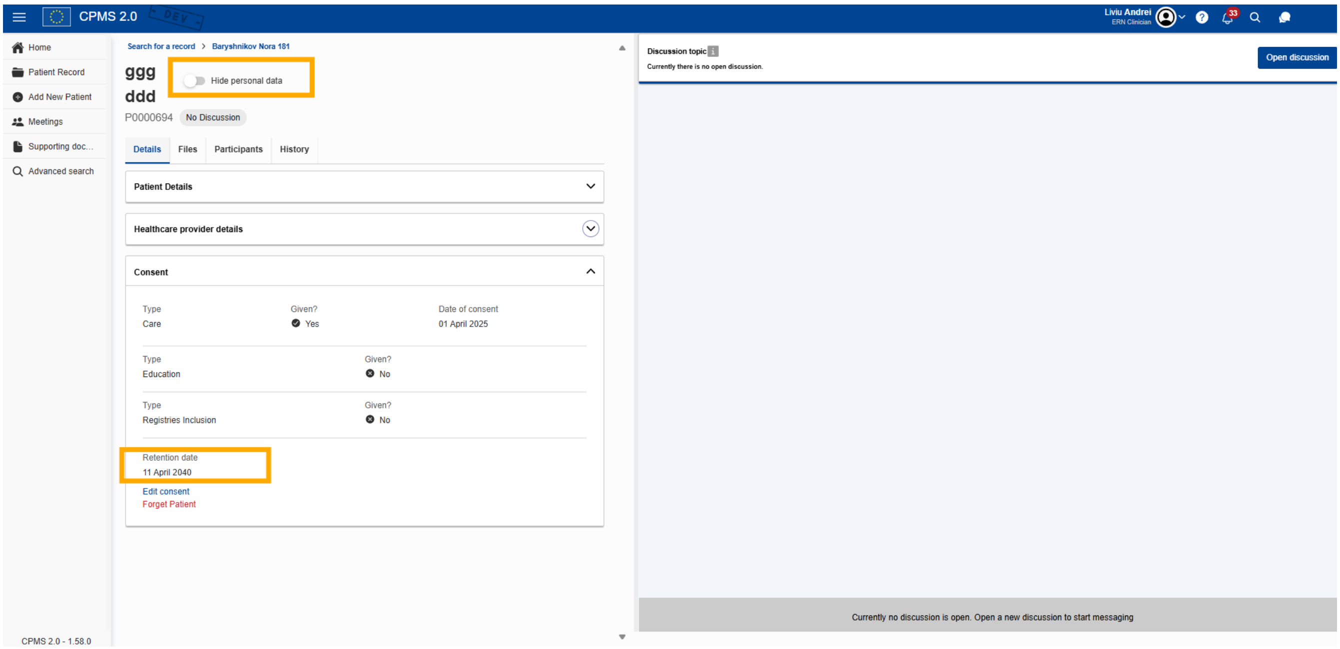
Step 5

Click on the “Leave” button inside the confirmation pop-up.



25. How long is a patient kept in the system?

A patient is kept in the system until the Patient retention date. This field is visible for the patient’s lead (and it’s assistants) and for the helpdesk of the patient’s ERN, on the bottom of the Details tab of the patient when the toggle is set to show personal data.

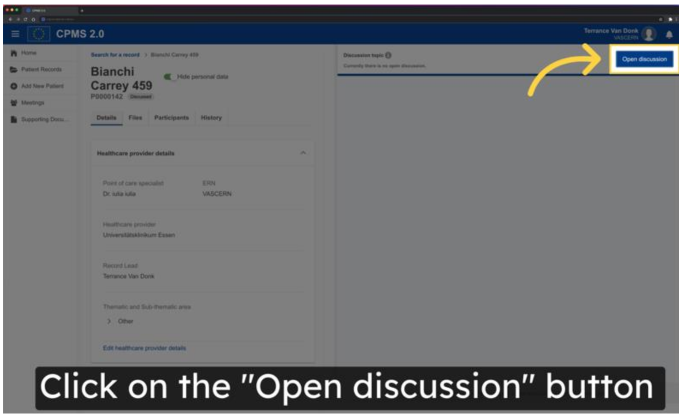


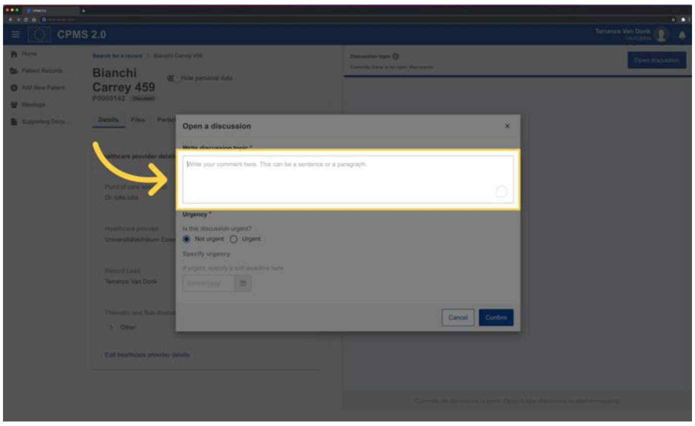
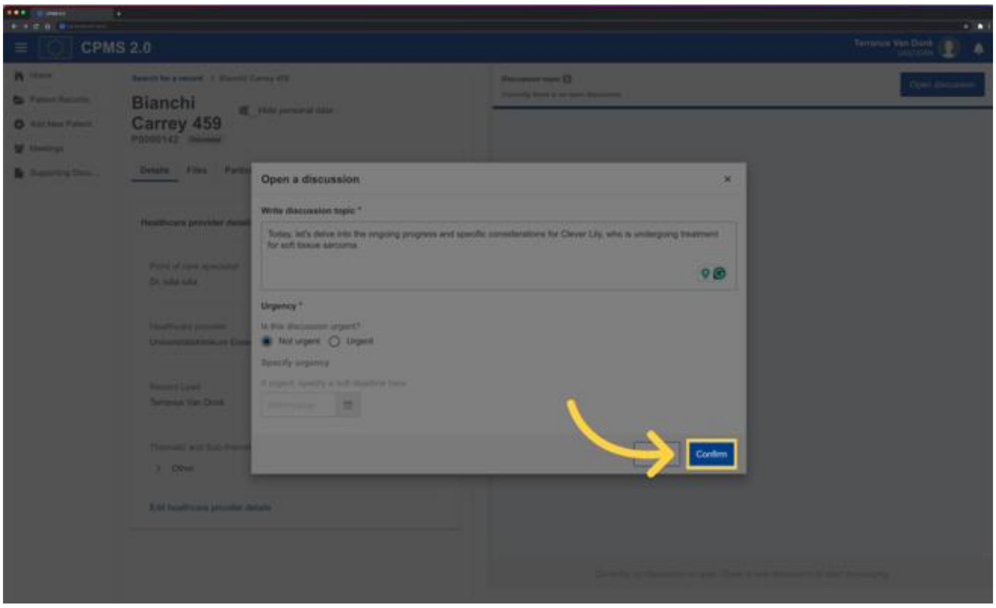
The value of this field is set to 15 years after patient creation in the system but can be updated by the above-mentioned users. It is important to note that the retention date should be at most 15 years later than the consent date, so that if the consent date is changed, the retention date should be updated accordingly.

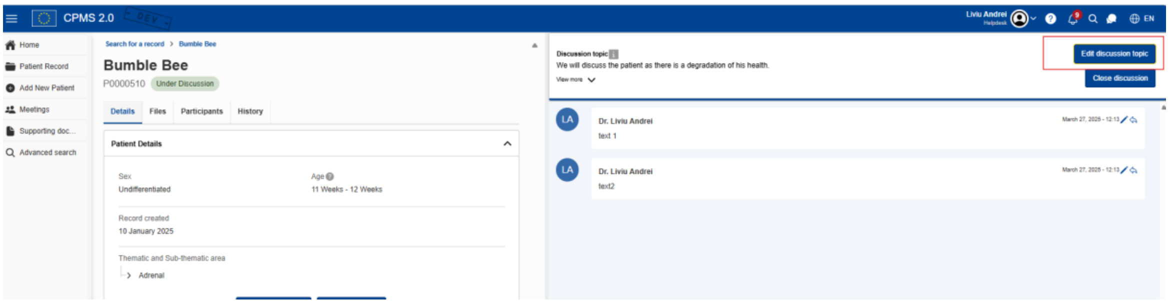
E. Patient Discussions

1. How to open a discussion?

If you're a patient lead or creator (or their assistant) or the helpdesk of the ERN the patient is registered in, and need to open a patient discussion, here are the steps you need to follow to open a discussion:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	After ensuring that there are no open discussions, click on the "Open Discussion" button. This will open a pop-up window. 

Step 4	In the pop-up window, provide a concise and clear discussion topic related to the patient's condition. Also, include details about the patient's medical history, medications, and past treatments. 
Step 5	Choose the urgency level (urgent/non-urgent) and update the patient's status accordingly. If the patient's condition is urgent, it is important to mark it as such, so that other clinicians can respond promptly. 
Step 6	After providing all the necessary details, click on "Confirm" button to initiate the discussion. This will create a new discussion thread, which will be visible to all clinicians who have access to the patient's records. 

<table>
<tr>
<td>Step 7</td>
<td>Note that the discussion topic can be edited all the time a discussion is open. To do this, the patient lead or creator (or their assistant) or the helpdesk of the ERN the patient is registered in can click on the “Edit discussion topic” button on the upper right side of the screen.


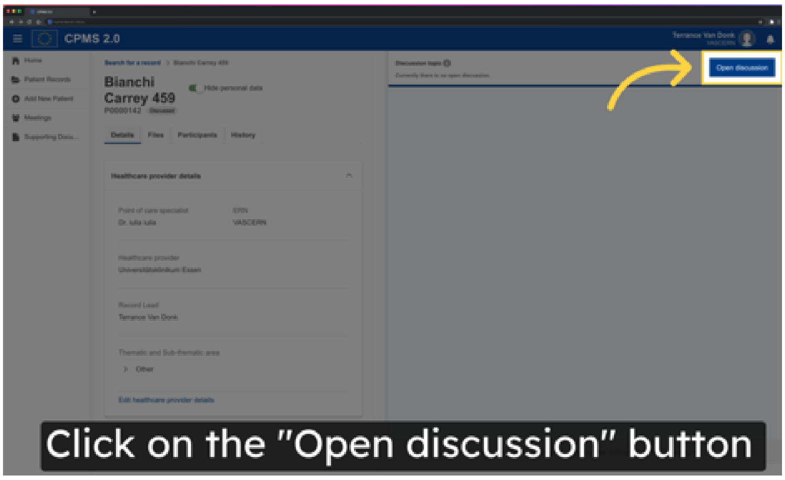
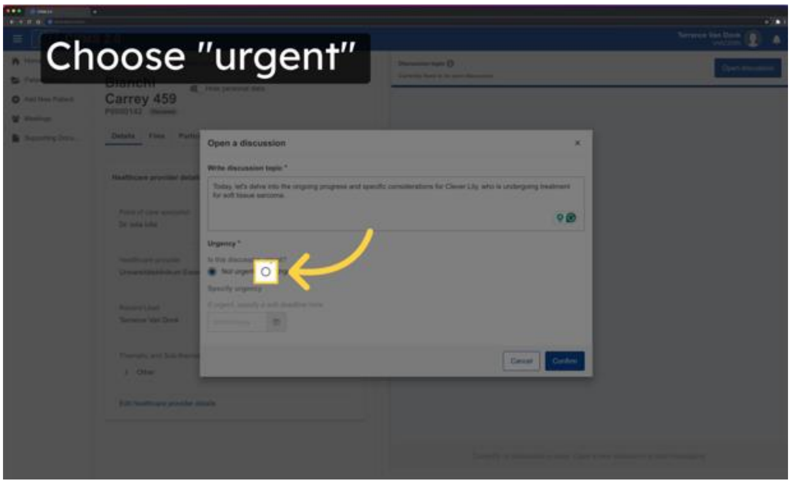
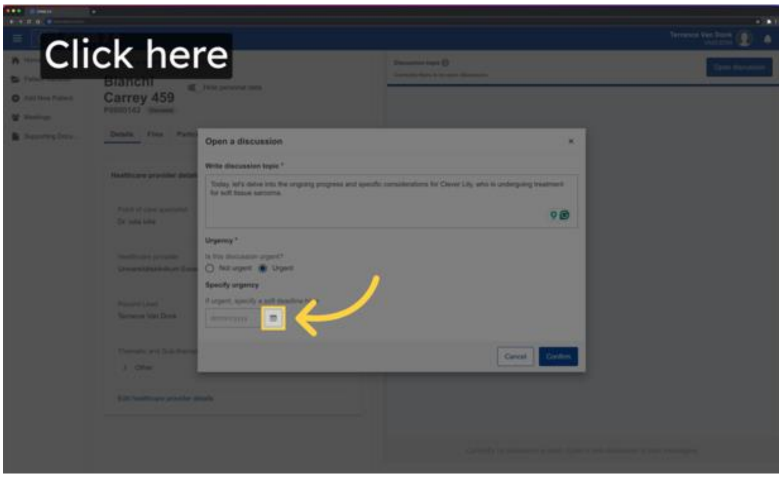
</td>
</tr>
</table>

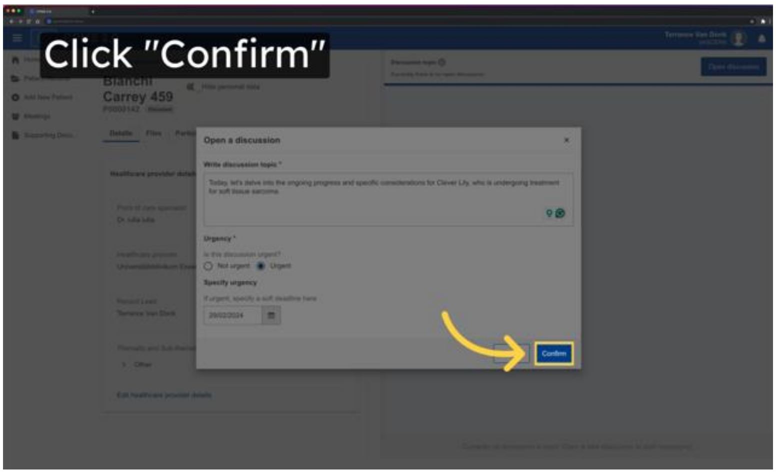
If you want to tag someone in the edited message, use the "@" feature. Simply type "@" and then start typing the name of the person you want to tag. They will receive a notification that they have been tagged in the message. Please note that when you are pressing Enter on your keyboard – it will enter a new line. To send a message please click on a blue arrow located in the right side of the message box.

2. How do I set the urgency of a patient discussion?

To set the urgency of a patient discussion, please follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Access the patient record page with no open discussion.

Step 4	After ensuring that there are no open discussions, click on the "Open Discussion" button. 
Step 5	A pop-up will appear, prompting you to select the level of urgency. Choose "urgent. 
Step 6	If the discussion is urgent, you can set a soft deadline for when you need a response from your colleagues. 

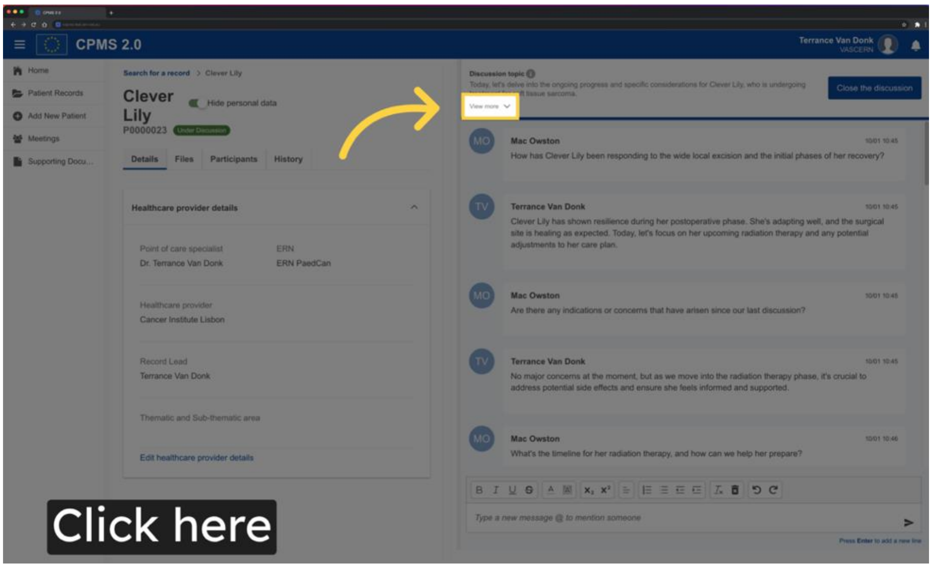
Step 7	Once you have made your selections, click "Open Discussion" to proceed. 

Please be informed that if a discussion is marked as urgent, you will have the option to set a deadline. This deadline will remind the participants about the time-sensitivity of the discussion and prompt them to respond in a timely manner. Along with the deadline display, the participants will receive an email and in-app notification with an exclamation mark, indicating the urgency of the discussion. This will ensure that the participants are aware of the urgency and can respond promptly.

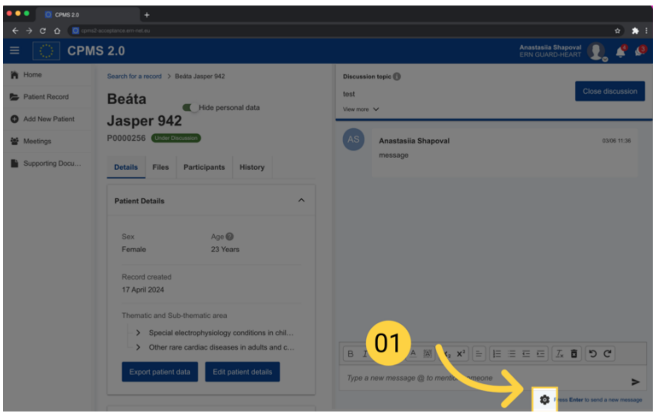
3. How do I consult discussions I am invited to participate to?

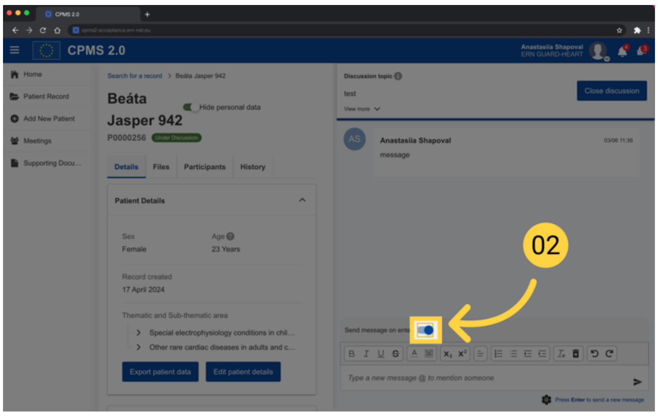
If you are trying to review discussion topic of a patient, follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Look for a patient with an active discussion. You can do this by searching for the patient's name or by sorting the patient's "Status" column by the "Under discussion" label.
Step 4	Once you've found the patient, navigate to their record page with a status of "Under discussion". Click on their name to access their details.
Step 5	On the right-hand side of the patient's details, you will see the first two lines of the discussion topic.

Step 6	To view the full discussion topic, click the arrow next to "view more". This will expand the discussion topic and allow you to read the entire topic. 

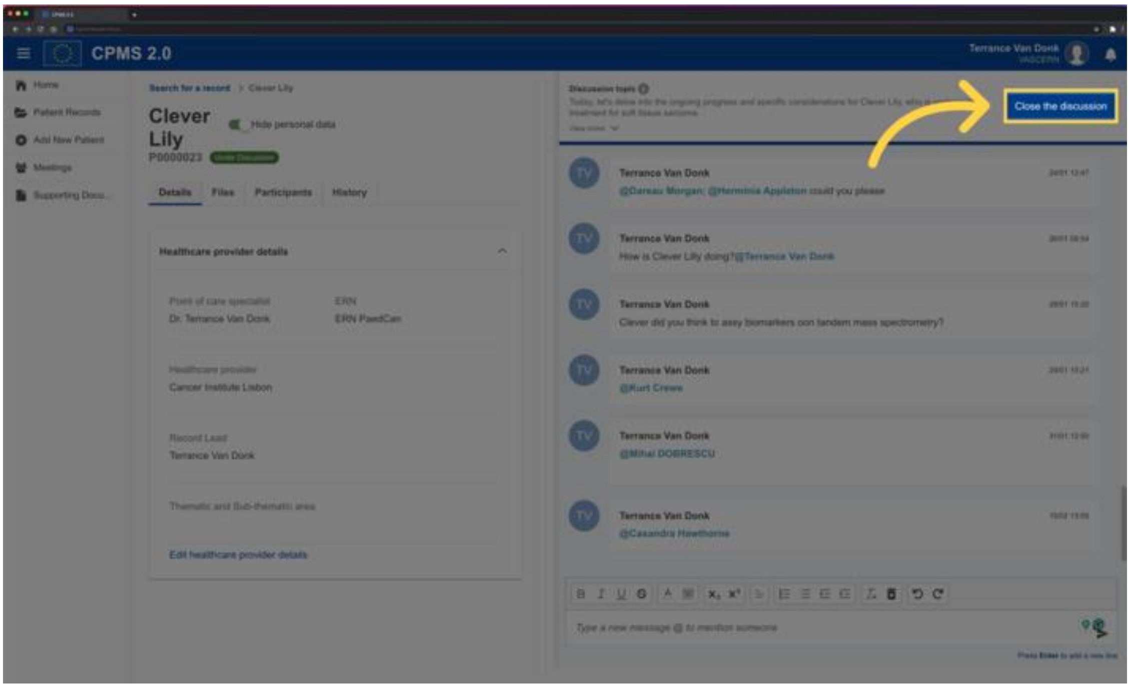
If you want to tag someone in the edited message, use the "@" feature. Simply type "@" and then start typing the name of the person you want to tag. They will receive a notification that they have been tagged in the message. Please note that when you are pressing Enter on your keyboard – it will enter a new line. To send a message please click on a blue arrow located in the right side of the message box. To change the behaviour of the ENTER button, click on the settings icon within the patient discussion and select your preferred ENTER behaviour option.





4. How to close a discussion?

If you're a patient lead or creator (or their assistant) or the helpdesk of the ERN the patient is registered in, follow these steps to close a discussion:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	First, ensure that you are the patient record owner. If you are, navigate to the discussion section of the patient record.
Step 4	You will be able to see the "Close Discussion" button on the right side of the screen, next to the discussion topic.
Step 5	Click on the "Close Discussion" button to initiate the process of closing the discussion. 

Step 6	You will need to provide a conclusion comment in the mandatory comment box that appears. This comment should summarize the key points that were discussed during the conversation and provide a reason for why the discussion is being closed. Please note that this comment will be displayed in the outcome document that is available under "History" tab for download. 

<table>
<tr><td>Step 7</td><td>If you want to see how the outcome document will look like, click on the “Preview outcome document” button. A new tab will be opened, and a draft version of the outcome document will be displayed (with a DRAFT watermark). This version can be saved on your local PC if you want.

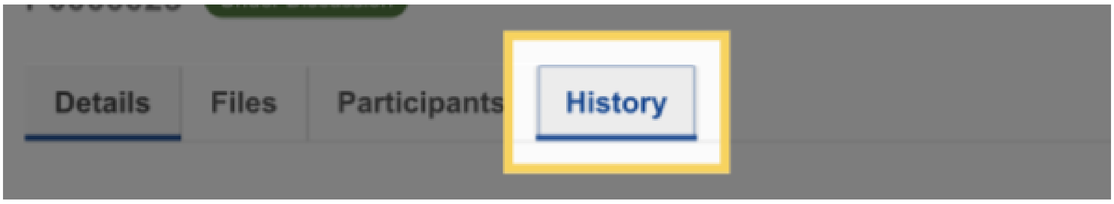
European Reference Networks
Patient P0000510 Thematic area: Adrenal Discussion closed on
Sub-thematic area: - still opened
ERN Endo-ERN
Experts involved
Record Lead: Moni MM of UniversitÃ¤tsklinikum MÃ¼nster / RITA, Endo-ERN unit (Biologist)
Experts having contributed: Liviu Andrei (CG developer)
Assistants:
To whom it may concern,
Patient P0000510 was enrolled on January 10, 2025 for assessment by the experts of the European Reference Network on endocrine conditions.
The topic under discussion is:
We will discuss the patient as there is a degradation of his health.
After discussing the patient case, the group of experts reached the following conclusion:
we will administrate Lidocaine and rediscuss in 1 month
With my best regards,
Moni MM (discussion lead)
DRAFT</td></tr>
<tr><td>Step 8</td><td>Once you are sure about the closure comment, press the button “SignOff”. The discussion status will automatically change to "Discussed" and the patient record status will update to "Discussed".</td></tr>
</table>

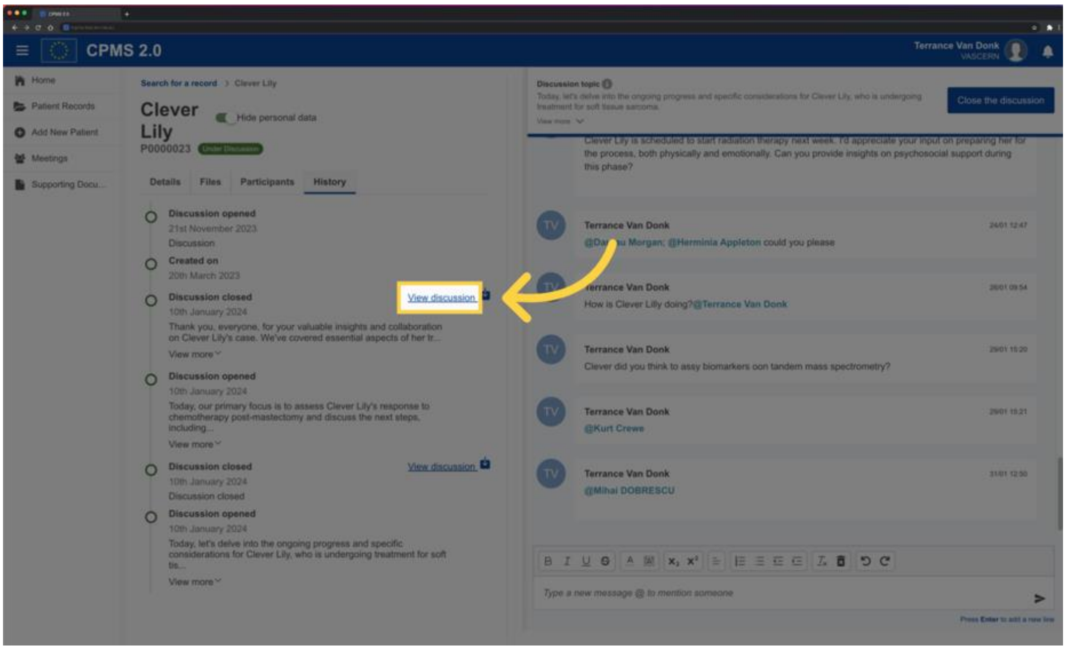
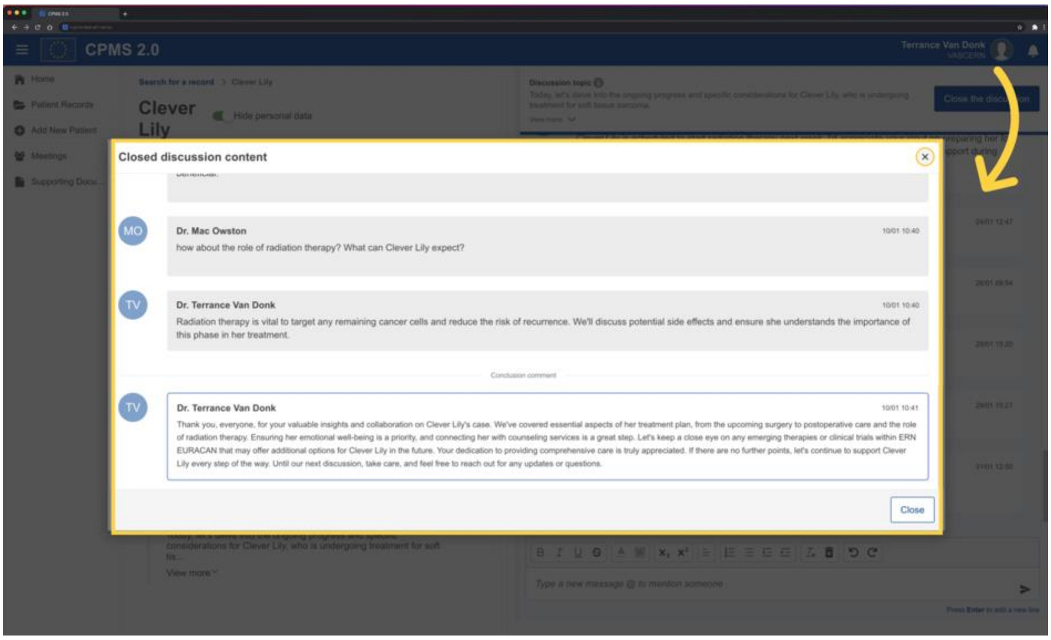
5. What happens if the deadline for urgent discussion has passed?

If the deadline for the urgent discussion passes, it won't affect the discussion itself. However, you can still send messages within the discussion and close it (if you are the lead). Nonetheless, it is always advisable to close the discussion before the deadline. This will help to ensure that the final decisions are made in a timely manner and that everyone involved in the discussion is aware of the outcomes.

6. Can I view the history of discussions made to patient record?

Yes, you can view the history of closed discussions in the Patient History tab. Here's how you can do it:

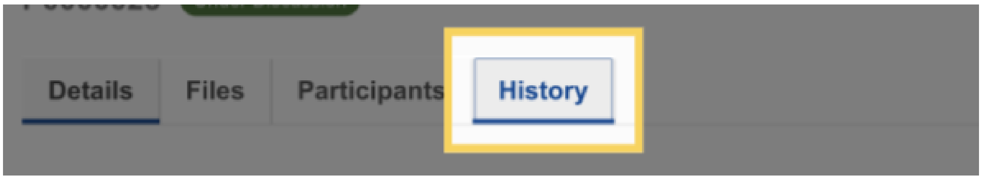
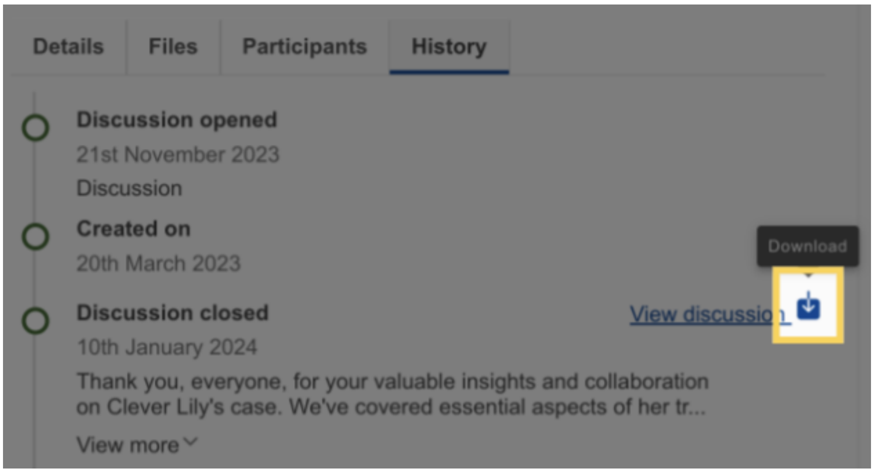
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Navigate to the patient profile for which you want to view the history of a closed discussion.
Step 4	Click on the "History" tab within the patient profile. 

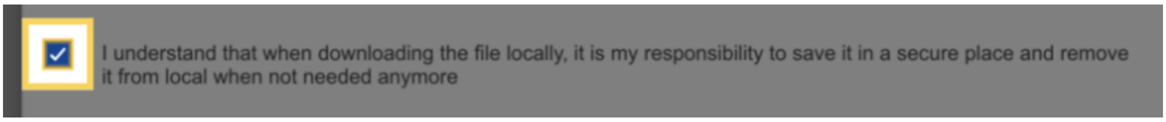
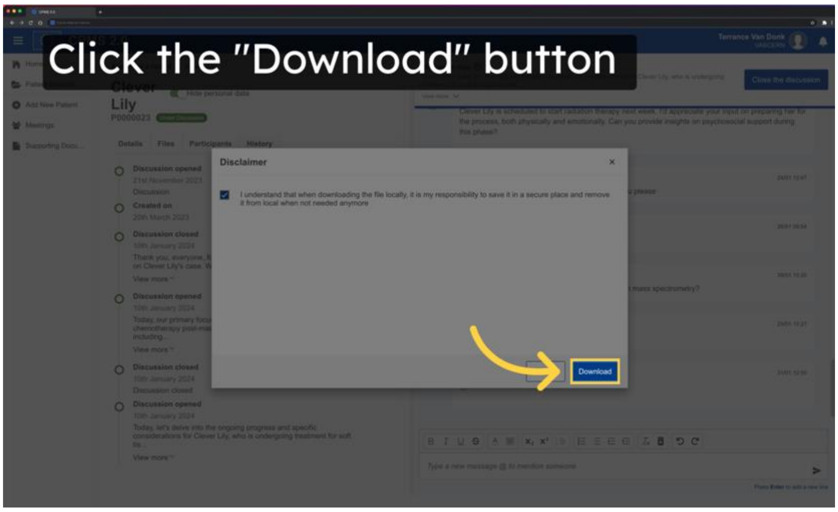
Step 5	Look for the entry of the closed discussion that you're interested in and click on the "View discussion" button. This button will be located next to the relevant closed discussion entry. 
Step 6	A pop-up window will appear, displaying the content of the previous discussion. You'll notice that the messages and Conclusion Comment (outcome) are grayed out, and you won't be able to edit or modify them. 
Step 7	You can scroll down through the content of the closed discussion to review its full history.

Step 8	After you're done, close the pop-up window by clicking on the "Close" button, and you'll be redirected back to the Patient History tab.

7. Is there a document with the conclusion of the discussion or some document like an outcome document?

Yes, you can download the outcome document in the Patient History tab. Here's how you can do it:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Navigate to the patient profile for which you want to download an outcome document.
Step 4	Click on the "History" tab within the patient profile. 
Step 5	Look for the entry of the closed discussion that you're interested in and click on the "Download" icon. This button will be located next to the relevant closed discussion entry. 

Step 6	Check the checkbox: “I understand that when downloading the file locally, it is my responsibility to save it in a secure place and remove it from local when not needed anymore.” 
Step 7	Click on the "Download" button to confirm your understanding and acceptance of the security responsibilities. 
Step 8	The file download will start, and you may be able to track its progress. Once the download is complete, the file will be saved to your computer.

This document provides complete details about a discussion that has ended. It includes the topic of the discussion, the exact date when the discussion was closed, along with the thematic and sub-thematic areas. It also lists all the experts who participated. Lastly, the document contains a concluding comment, which summarizes the discussion's outcome. This comment is written by the lead or assistant who closed the discussion.

F. Meetings

1. What does the term “meeting” mean in the context of CPMS 2.0?

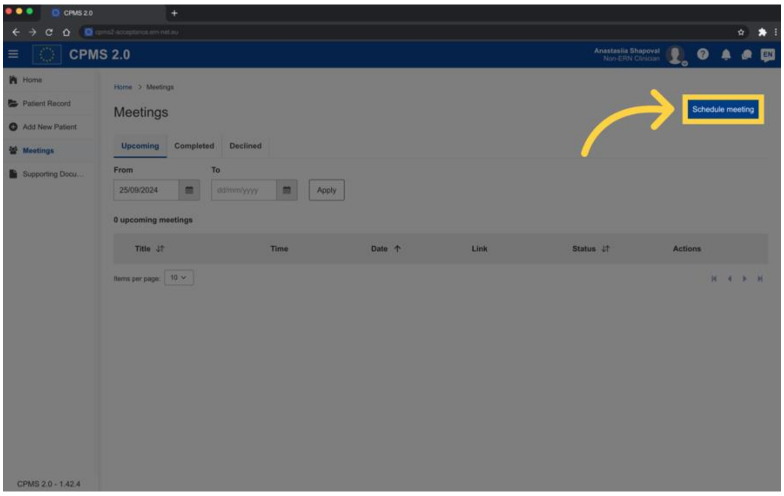
CPMS 2.0 Meeting term refers to the scheduled time where users can synchronize audio and video with each other.

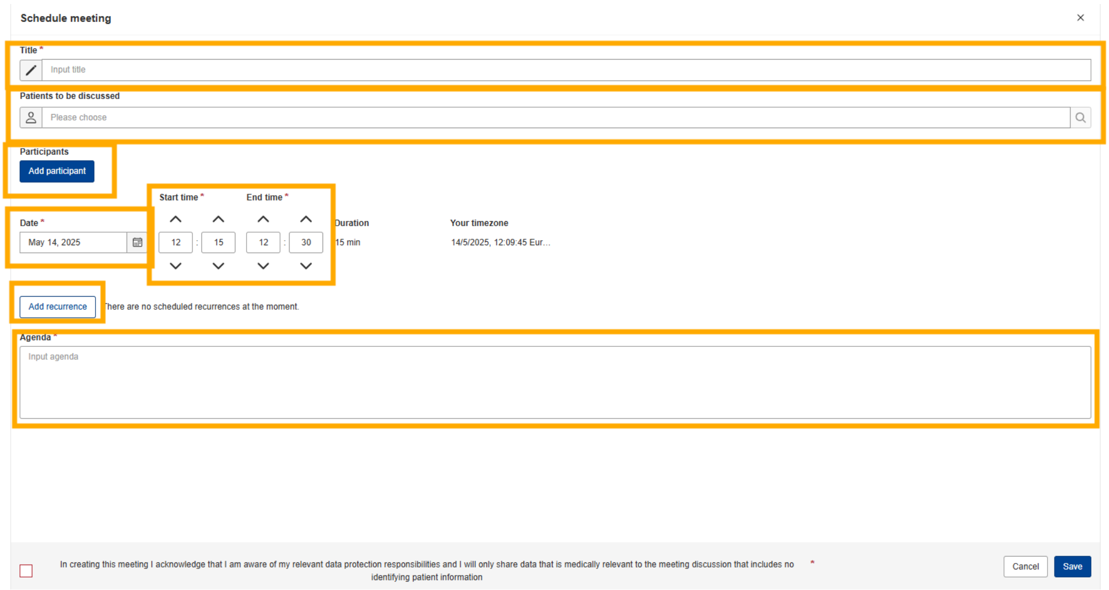
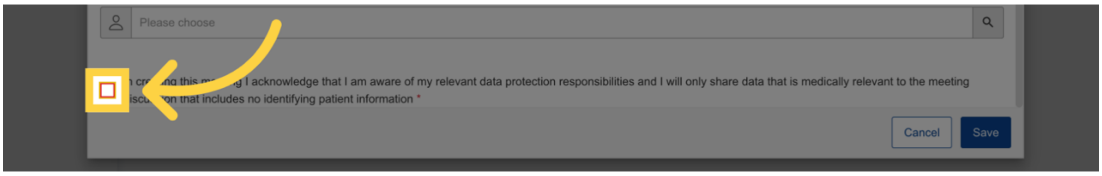
2. With whom can I have a meeting inside the CPMS 2.0?

You can have a meeting with any CARE user regardless of their role or ERN.

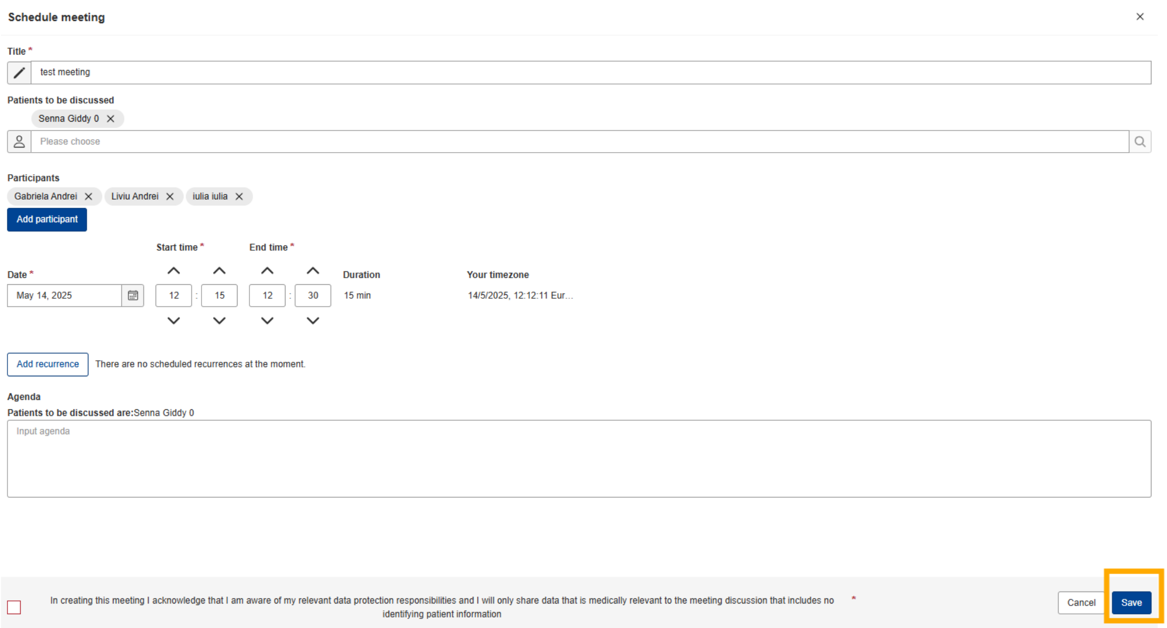
3. How do I schedule a meeting in CPMS 2.0?

To schedule a meeting in CPMS 2.0, please follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".
Step 3	Click on the "Schedule Meeting" button located on the right upper corner of the screen. 

Step 4	Fill in the details for the meeting, including title, date, time, recurrence and agenda.  Note that adding a patient to the meeting: - automatically adds the patient's participants in the meeting's participants list (these added participants can be individually removed, if desired). - automatically adds the list of discussed patients to the meeting's agenda
Step 5	Check the disclaimer: "In creating this meeting I acknowledge that I am aware of my relevant data protection responsibilities, and I will only share data that is medically relevant to the meeting discussion that includes no identifying patient information." 

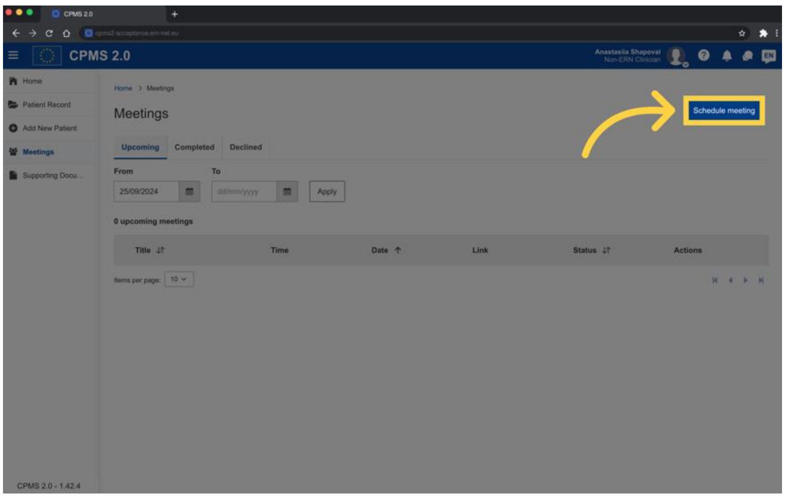
<table>
<tr><td>Step 6</td><td>Save your meeting details to view the scheduled meeting in the "Upcoming Meetings" tab.

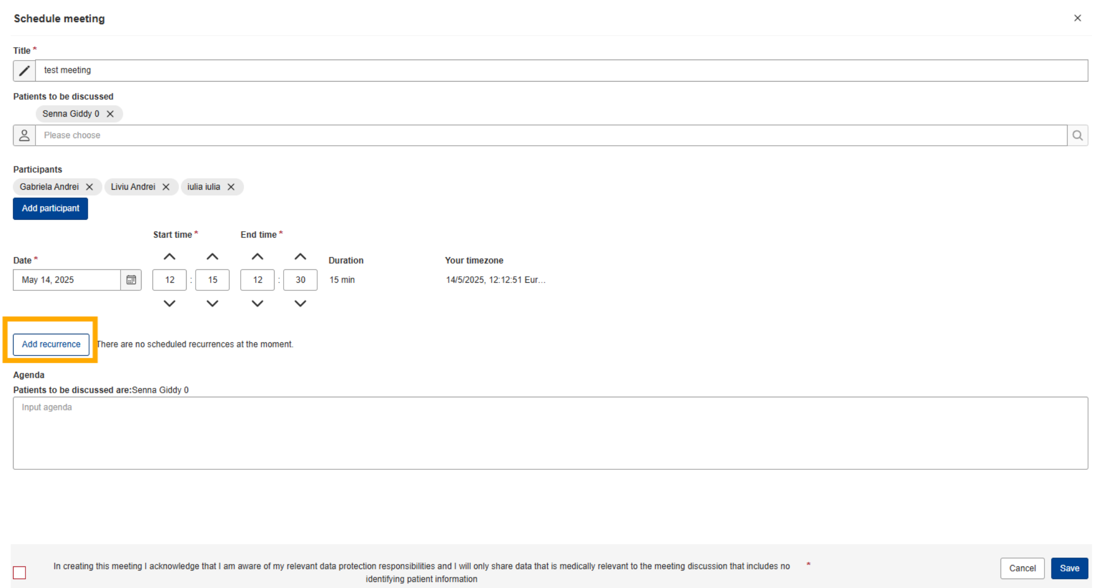
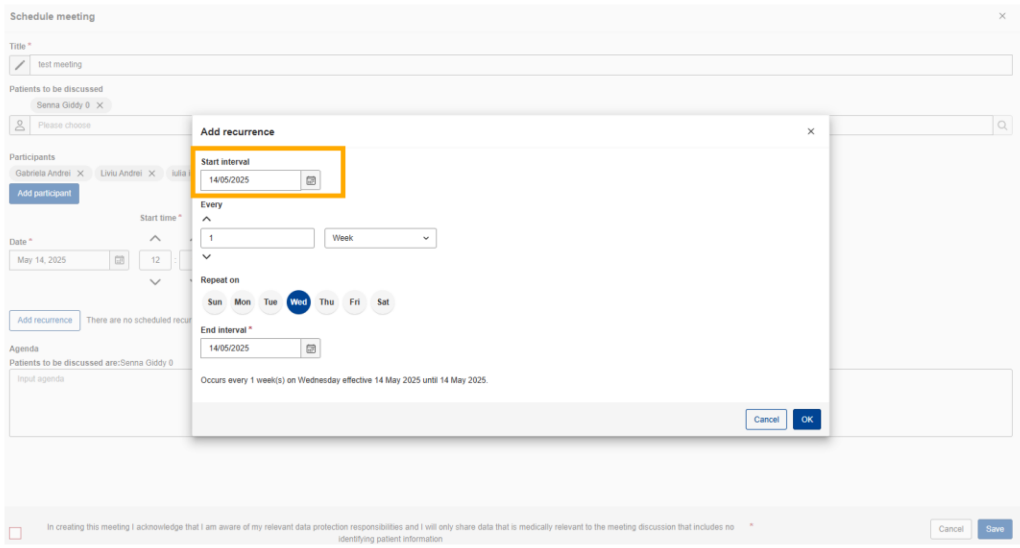

</td></tr>
</table>

4. Can I schedule recurring meetings in CPMS 2.0?

Yes, you can schedule recurring meetings in CPMS 2.0. To do this, follow these steps:

<table>
<tr><td>Step 1</td><td>Log in to the CPMS 2.0 system using your credentials.</td></tr>
<tr><td>Step 2</td><td>From the left-hand side menu, select "Meetings".</td></tr>
<tr><td>Step 3</td><td>Click on the "Schedule Meeting" button located on the right upper corner of the screen.

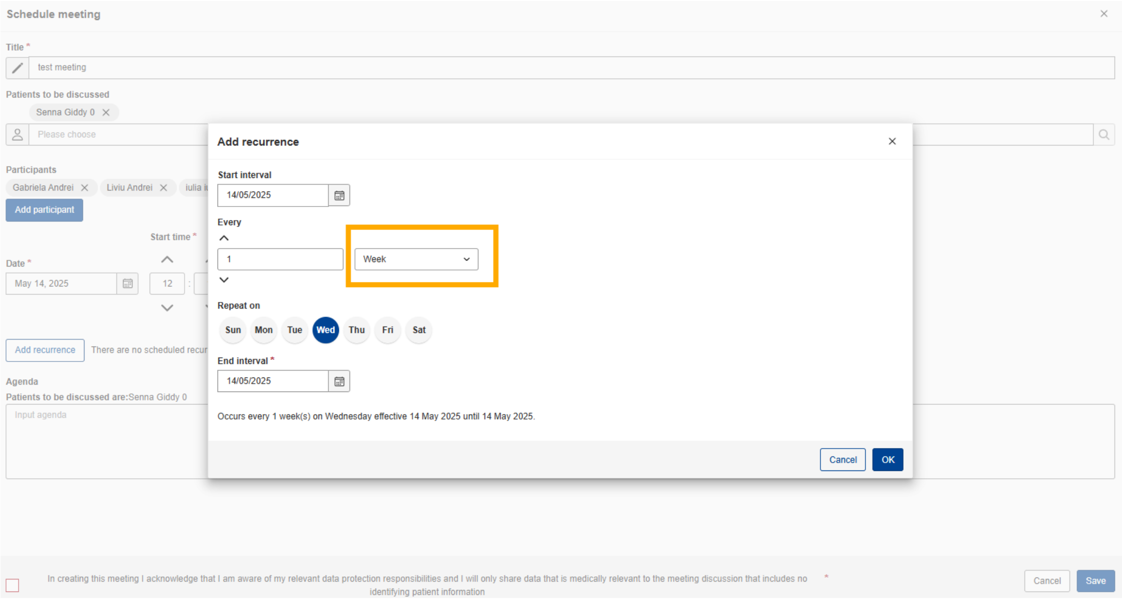

</td></tr>
</table>

<table>
<tr>
<td>Step 4</td>
<td>In the schedule meeting pop-up, click on the "Add recurrence" button to set up a recurrence.

</td>
</tr>
<tr>
<td>Step 5</td>
<td>Set a start interval and determine when the recurrence should begin.

</td>
</tr>
</table>

Step 6

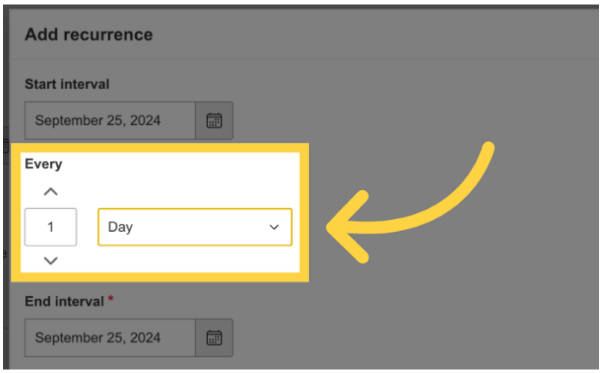
Choose the recurrence pattern you want. You can choose weekly, daily or monthly.

- **Daily:** Events repeat every day or every X days.
- **Weekly:** Events repeat every week on specific days (e.g., every Monday, every Wednesday, every Friday).
- **Monthly:** Events repeat on a specific weekday of the month (e.g., the first Monday of every month).

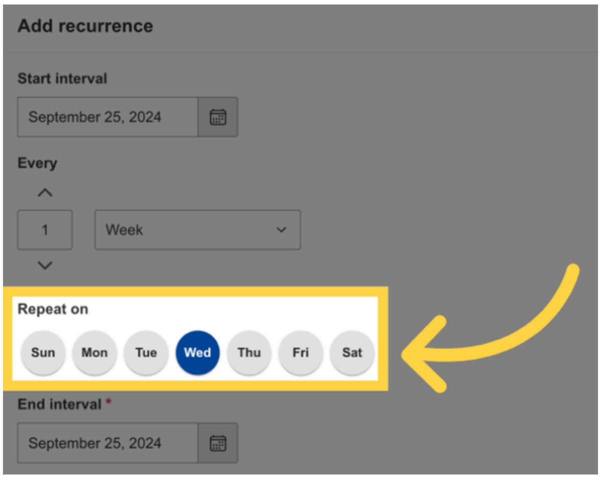


<table>
<tr>
<td>Step 7</td>
<td>
Customize the pattern:

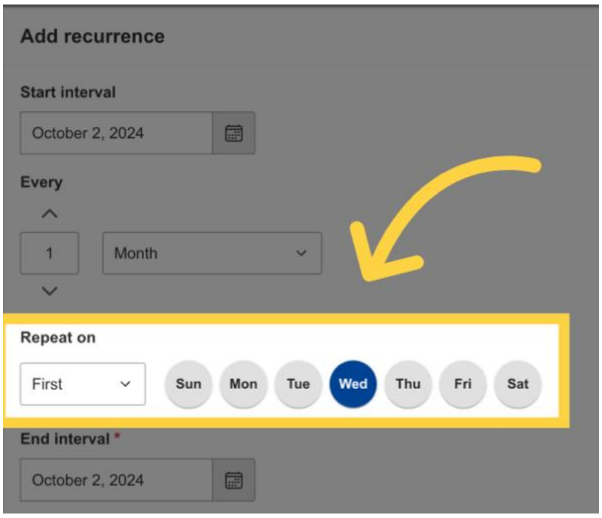
- **Daily:** Specify the number of days between occurrences.



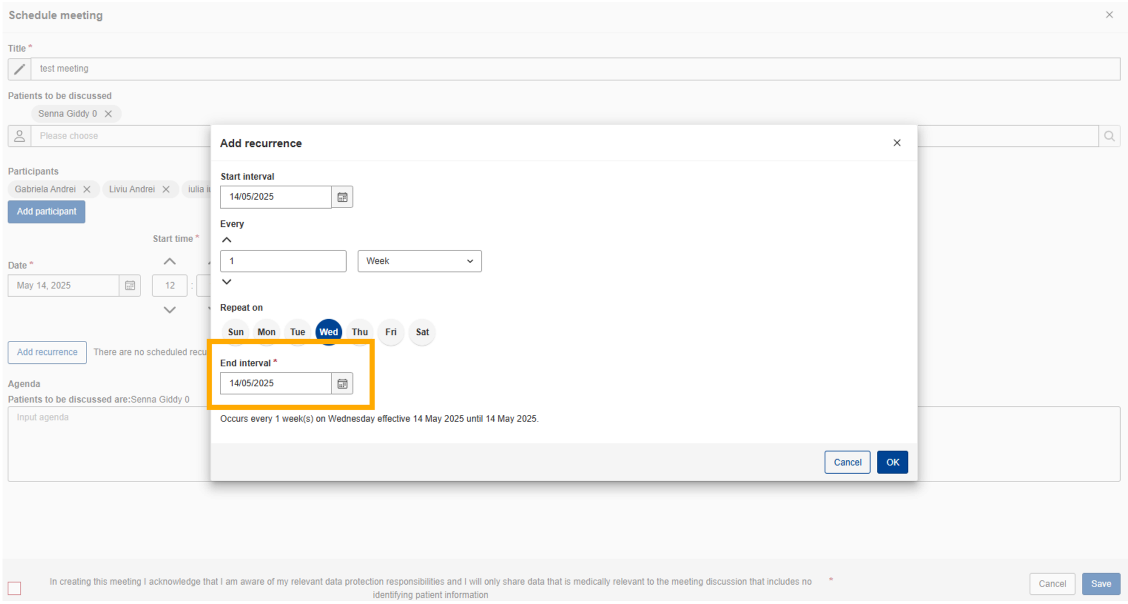
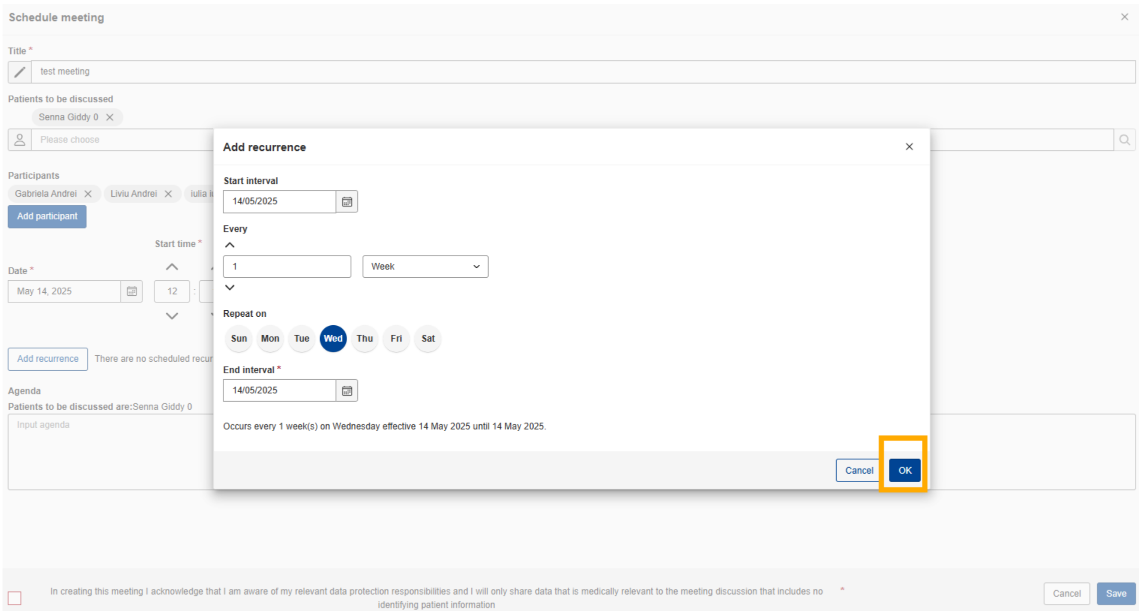
- **Weekly:** Select the days of the week for the recurrence.



- **Monthly:** Choose the day of the month or the weekday of the month (e.g., the first Monday).



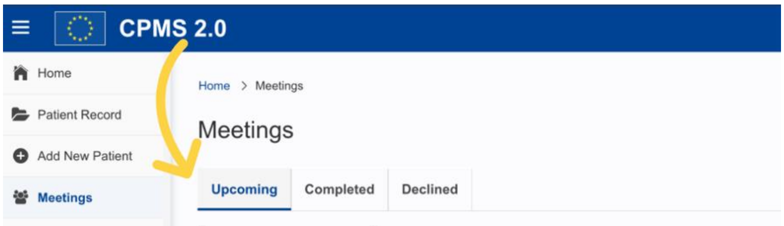
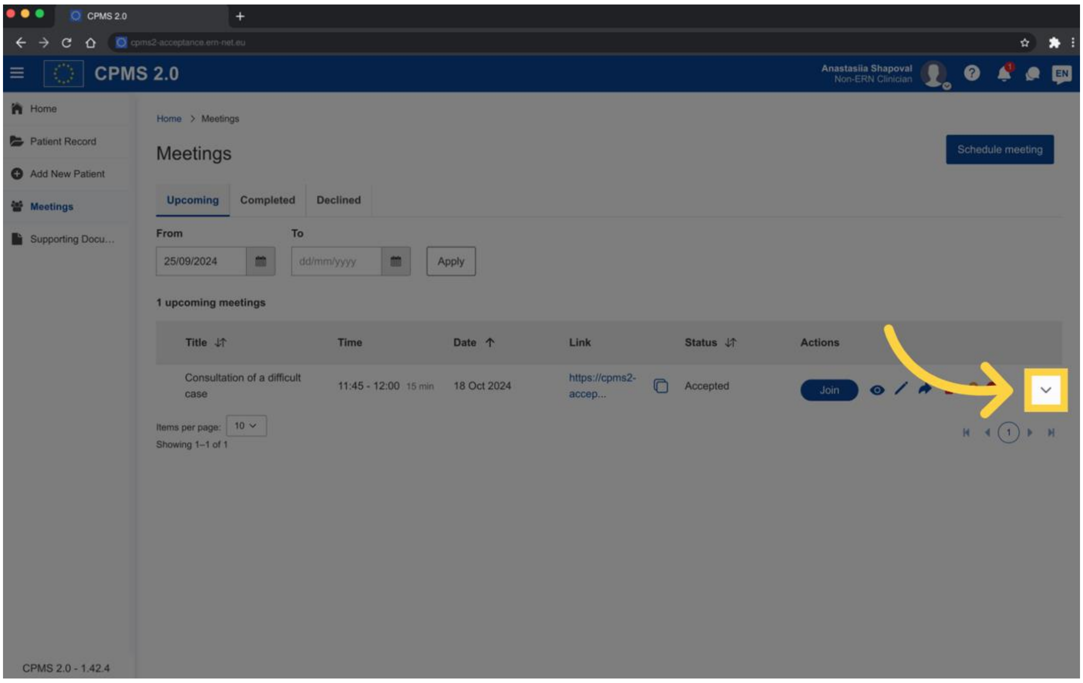
</td>
</tr>
</table>

<table>
<tr><td>Step 8</td><td>Set an end interval and determine when the recurrence should stop.

</td></tr>
<tr><td>Step 9</td><td>Click on the “OK” button to save the recurrence.

</td></tr>
</table>

5. How do I view the agenda for an upcoming meeting?

To view the agenda for an upcoming meeting, please follow these steps:

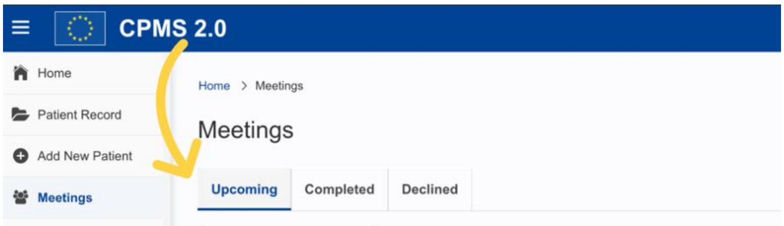
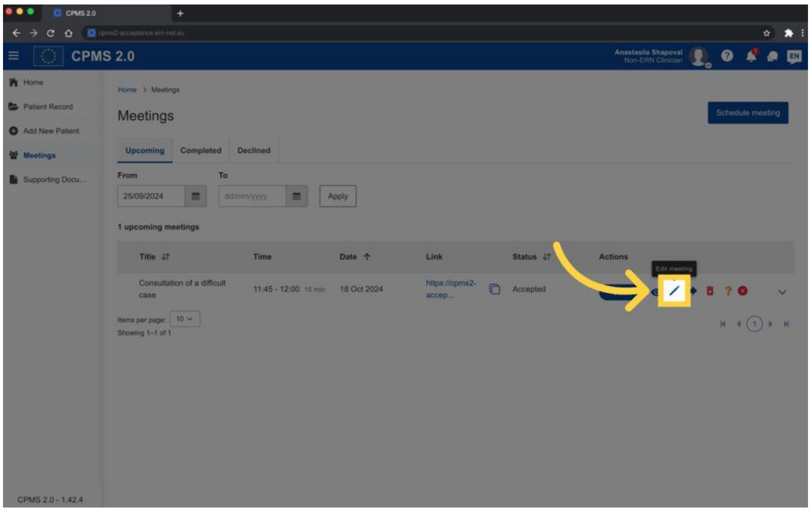
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".

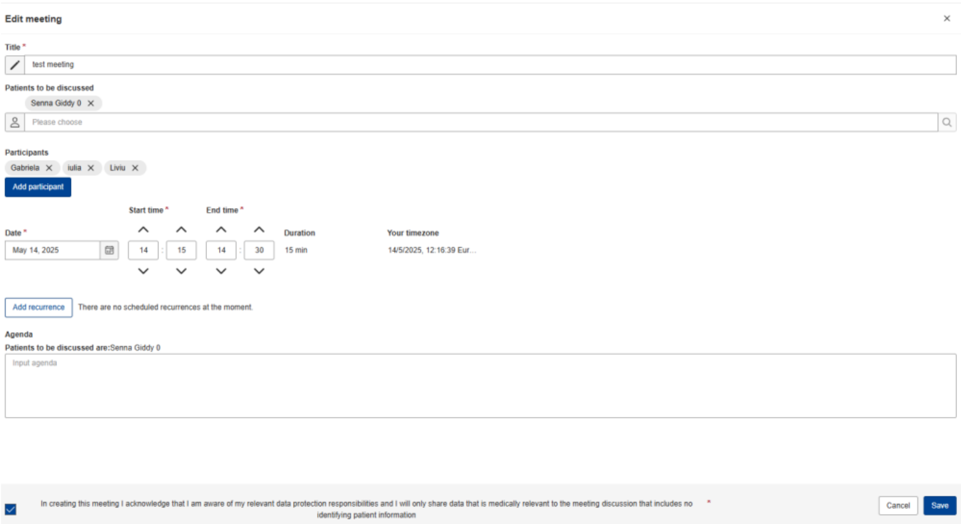
<table>
<tr><td>Step 3</td><td>In the "Upcoming" tab, find the specific meeting you are interested in.

</td></tr>
<tr><td>Step 4</td><td>Click on the arrow inside the action column in the table for the desired meeting.

</td></tr>
<tr><td>Step 5</td><td>Inside the meeting details, you can access the full agenda, participants list, and any relevant information.</td></tr>
</table>

6. How can I edit a meeting that I have created?

To edit the details for an upcoming meeting, please follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".

<table>
<tr><td>Step 3</td><td>In the "Upcoming" tab, find the specific meeting you are interested in.

</td></tr>
<tr><td>Step 4</td><td>Click on the “Pencil” icon inside the action column in the table for the desired meeting.

</td></tr>
</table>

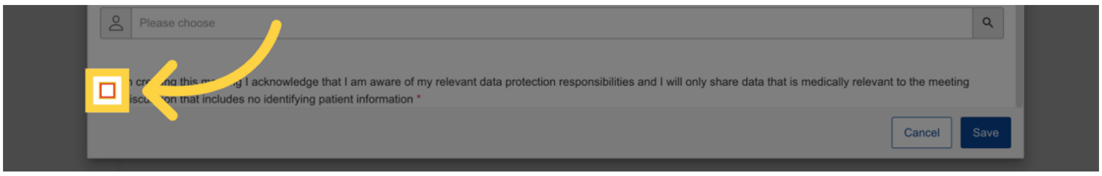
<table>
<tr><td>Step 5</td><td>
Review and make any necessary changes to your meeting.


Note that adding a patient to the meeting:

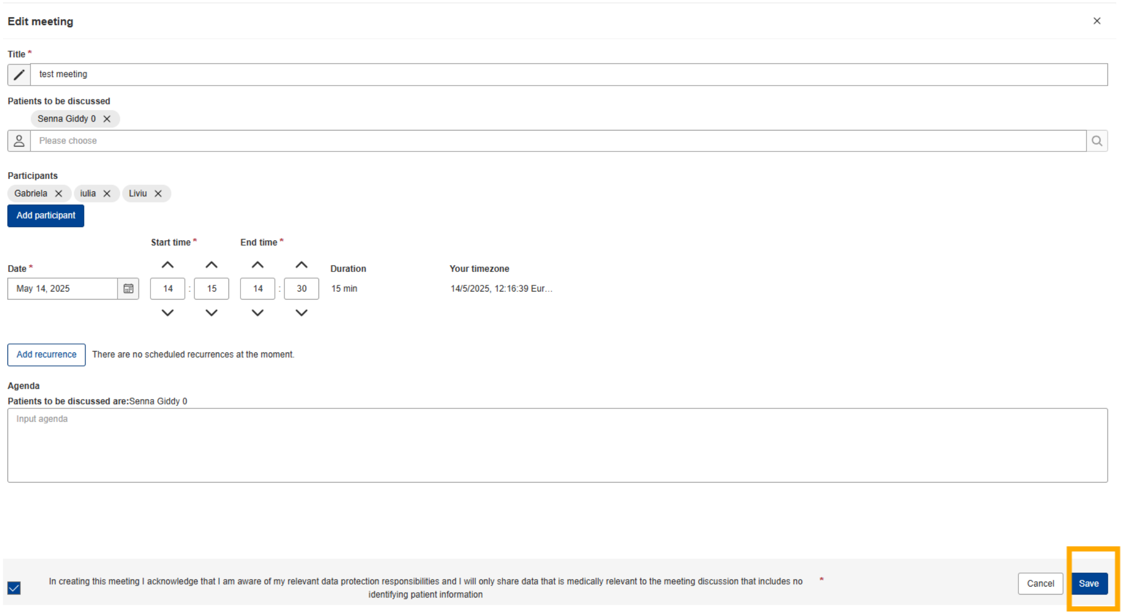
automatically adds the patient’s participants in the meeting’s participants list (these added participants can be individually removed, if desired).
automatically adds the list of discussed patients to the meeting’s agenda

Similarly, removing a patient from the meeting:

automatically removes the patient’s participants from the meeting’s participants list (if they are not participants in other patients present in the meeting)
automatically removes the patient from the list of discussed patients present in the meeting’s agenda

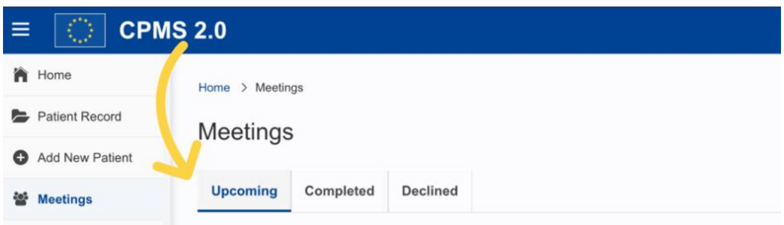
</td></tr>
<tr><td>Step 6</td><td>
Scroll down to the bottom of the pop-up and check the disclaimer.


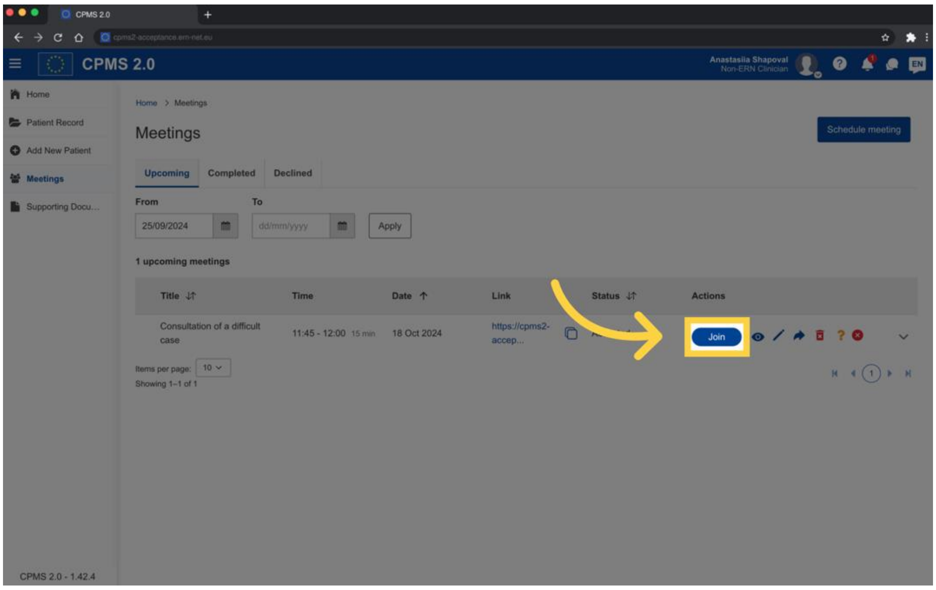
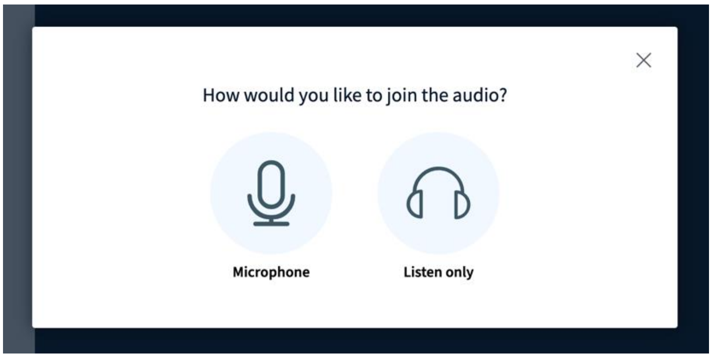
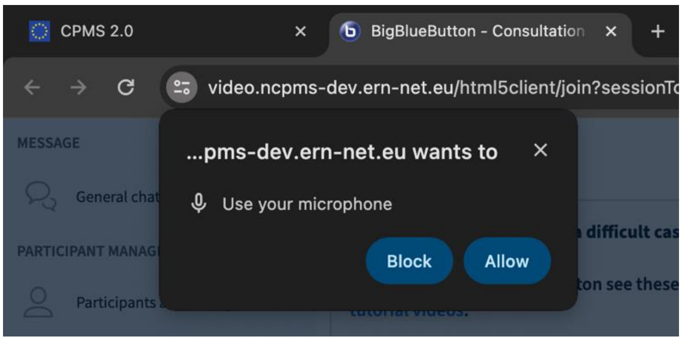
</td></tr>
</table>

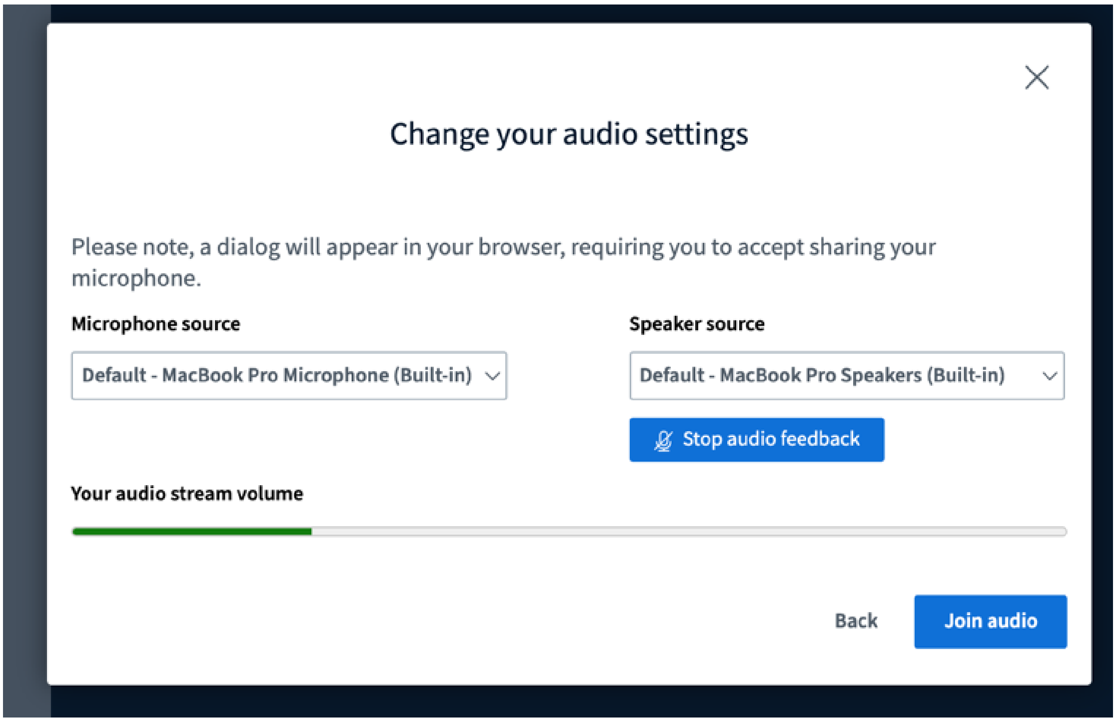
Step 7	Once you have completed all the necessary edits, simply click on the "Save" button to finalize your changes. 

7. How can I join a meeting?

To cancel an upcoming meeting, please follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".
Step 3	In the "Upcoming" tab, find the specific meeting you want to join. 

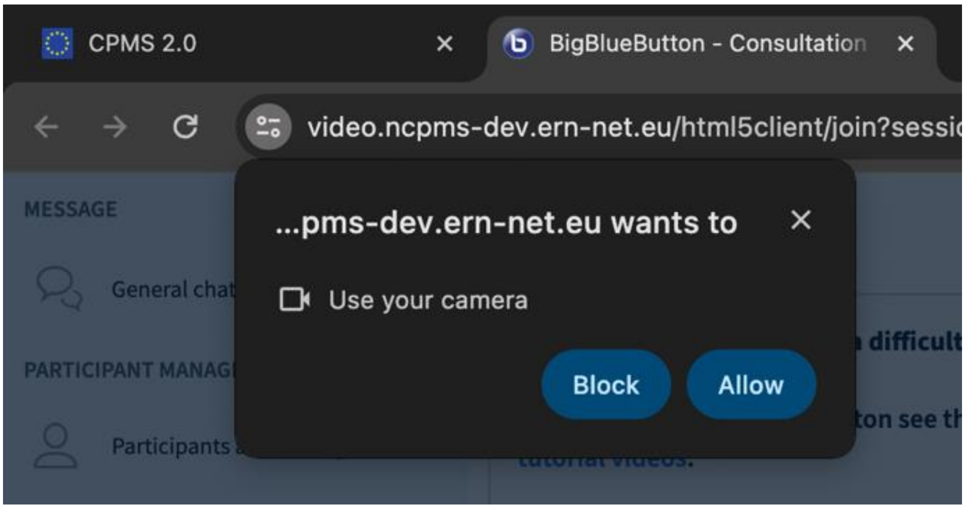
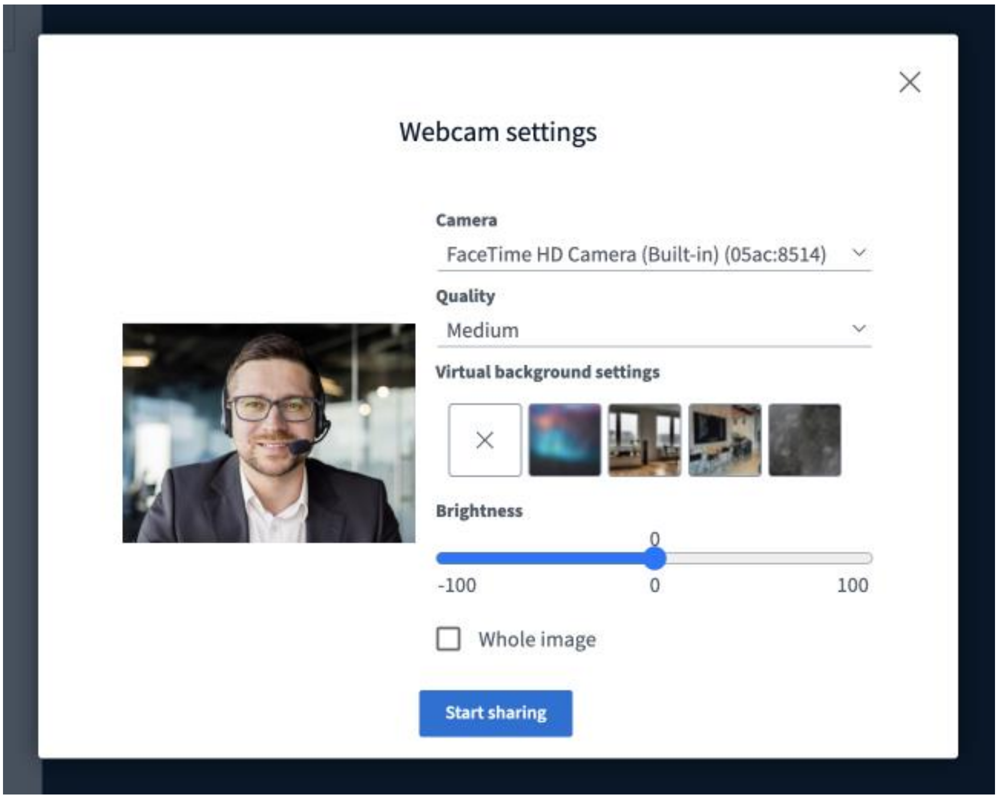
<table>
<tr><td>Step 4</td><td>Click on the “Join” button inside the action column in the table for the desired meeting.

</td></tr>
<tr><td>Step 5</td><td>You will be prompted to choose whether to join with your microphone enabled or in listen mode.

</td></tr>
<tr><td>Step 6</td><td>If this is the first time you are connecting to a CPMS 2.0 meeting with your microphone, you may be prompted to grant your browser permission to use the microphone. If this is the case, please click “Allow”.

</td></tr>
</table>

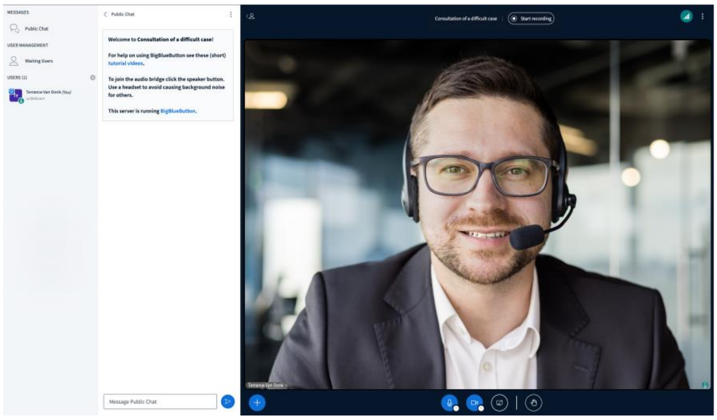
Step 7	Check your audio settings by saying a few words and check if you hear the echo. 
Step 8	Click on the “Join audio” button.

8. How to turn on the video inside the meeting?

To turn on your video, please follow these steps:

Step 1	Look for the “Camera” icon. It's located towards the bottom of the screen. Click on the “Camera” icon. 

Step 2	If this is the first time you are connecting to a CPMS 2.0 meeting with your video, you may be prompted to grant your browser permission to use your camera. If this is the case, please click “Allow”. 
Step 3	Make sure to check your webcam settings, where you can choose which camera you wish to use (if you have more than one) and the video quality and click “Start Sharing”. If you have a slow Wi-Fi connection, Medium or Low quality can be a good choice to save bandwidth. 

<table>
<tr><td>Step 4</td><td>You should now see the video from your camera.

</td></tr>
</table>

9. What can I do if I do not have sound or video inside the meeting?

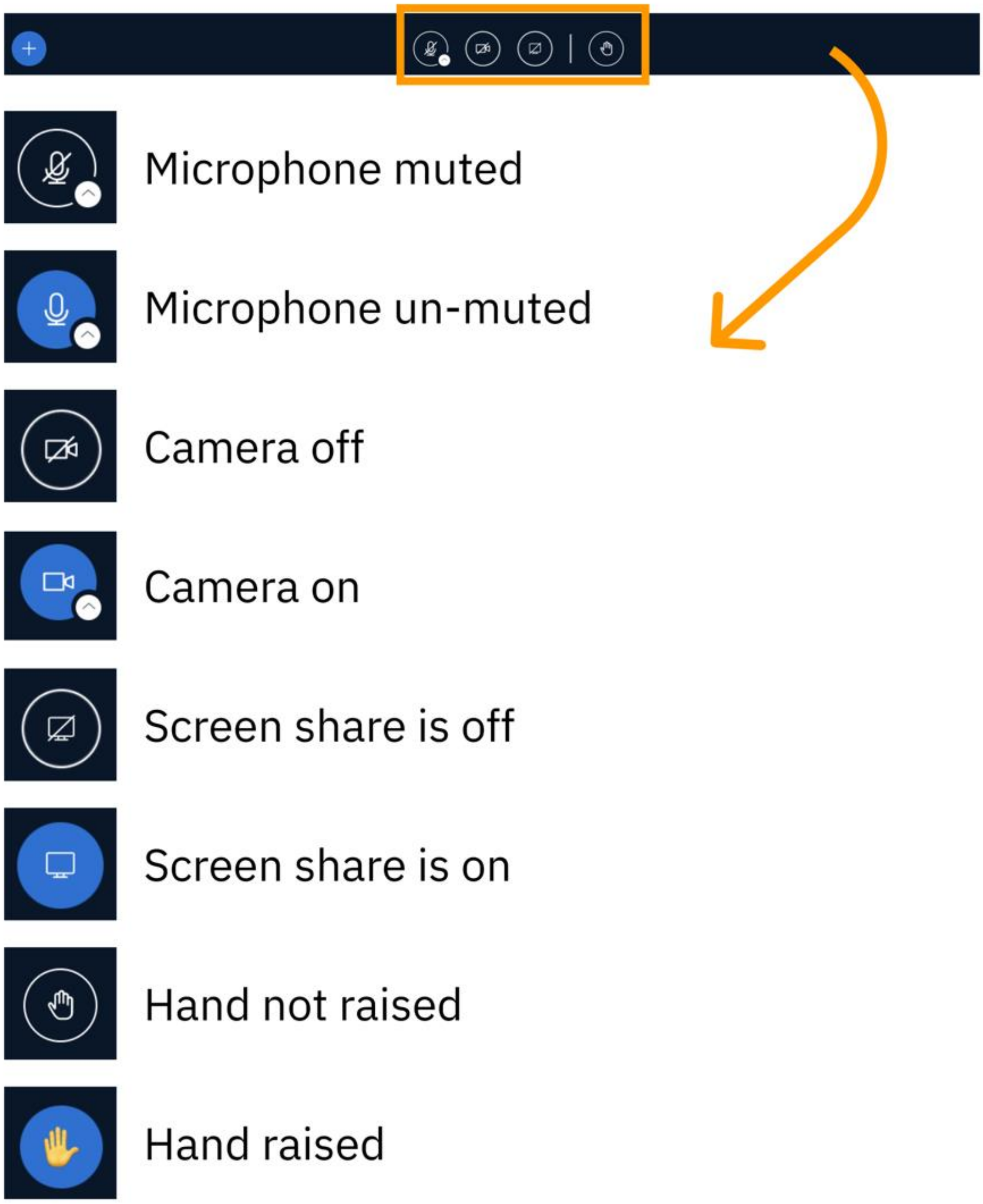
It takes a while to connect, so please be patient and, if possible, use a headset with a dedicated mute button if you can, then make sure the right sound device/microphone is selected.

<table>
<tr><td rowspan="4">If you successfully connected to the meeting but:
You cannot hear the participants;
The participants cannot hear you;
The participants cannot see you;</td><td>Your browser displays a message about not being able to access or use your microphone, sound device or camera: Please refer to “How can I join a meeting” question, step 5.</td></tr>
<tr><td>Try disabling and re-enabling audio.</td></tr>
<tr><td>Try leaving and re-joining the meeting.</td></tr>
<tr><td>Try clearing the browser cache, close it and launch it again or try joining the meeting using a different browser.</td></tr>
</table>

If you experience audio issues during the meeting, we recommend you log out of the meeting and try a different browser, sound setting or other audio device (we recommend a wired headset for reliability) before logging in again, as the platform may not detect a change of audio device.

10. What are the functions of the buttons located below the video?

You can control your microphone, sound, camera and raise hand feature by clicking the buttons below.

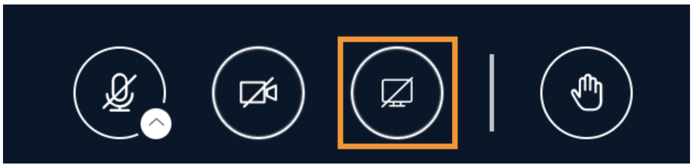
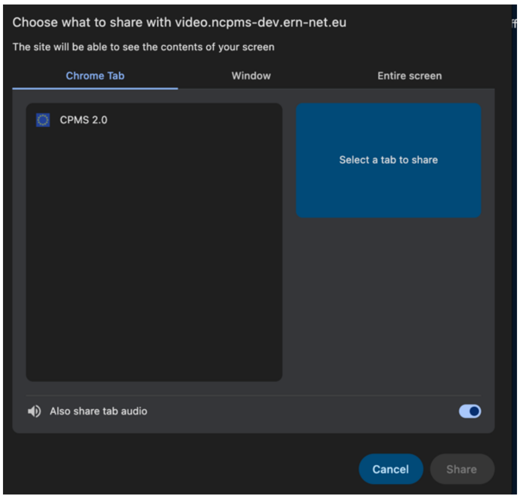


11. How can I share the screen inside the meeting?

A presenter in BigBlueButton can use screen sharing to display content from their local desktop/laptop or Chromebook in Chrome, Firefox, Safari, and Edge browsers. You can share your entire screen or an application window from your local desktop or laptop device.

If you are a viewer you will need to request presenter status from the moderator. When a user has the presenter role, the presenter icon will appear over their avatar in the users list.

To share your screen, please follow these steps:

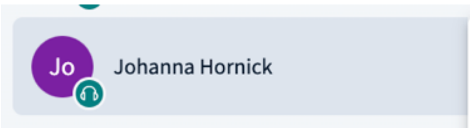
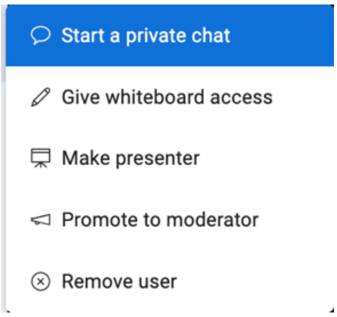
<table>
<tr><td>Step 1</td><td>Look for the “Presentation” icon. It's located towards the bottom of the screen. Click on the “Presentation” icon.
</td></tr>
<tr><td>Step 2</td><td>Choose what you want to share: Your Entire Screen or an Application Window or Tab.

</td></tr>
<tr><td>Step 3</td><td>Once you have configured the screen share to your preference, press on the “Share” button to begin sharing with attendees.</td></tr>
</table>

12. How to screen share from mobile/tablet inside the meeting?

Screen sharing is currently not supported on mobile and tablet devices. To share a screen the presenter must use a desktop, laptop, or Chromebook.

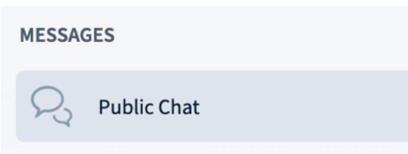
13. How to start a private chat with a participant inside the meeting?

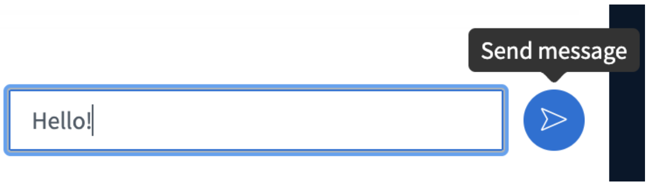
To start a private chat with a participant, please follow these steps:

Step 1	Click on the username of the participant you want to privately chat with. 
Step 2	Select from the menu "Start a private chat" option. 
Step 3	Write a private message inside the "Private chat".

14. How to write messages inside the meeting?

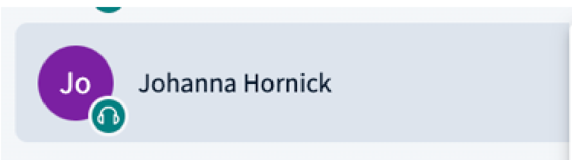
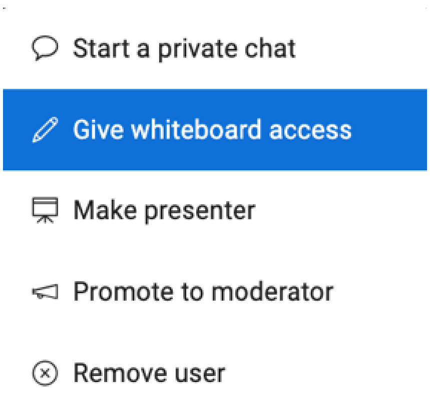
To start a public chat with a participant, please follow these steps:

Step 1	Click on a "Public Chat" option on the left side menu. 
Step 2	Go to the white box located in the bottom of the screen. 

Step 3	Write a message inside the “Public chat”.
Step 4	Send a message by clicking on the “Arrow” located nearby white box. 

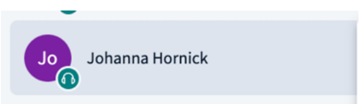
15. How to give whiteboard access inside the meeting?

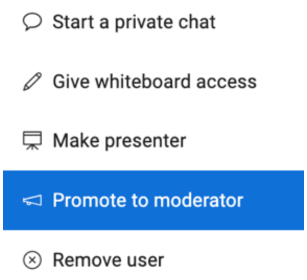
If you are the moderator, please follow these steps to give whiteboard access to another participant:

Step 1	Click on the username of the participant you want to give whiteboard access. 
Step 2	Select from the menu “Give whiteboard access” option. 

16. How to promote user to moderator inside the meeting?

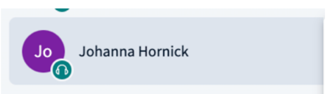
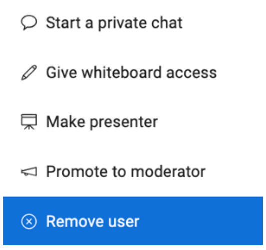
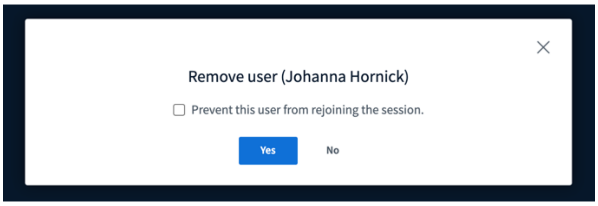
If you are the moderator, please follow these steps to promote another user to moderator:

Step 1	Click on the username of the participant you want to promote to moderator. 

Step 2	Select from the menu “Promote to moderator” option. 

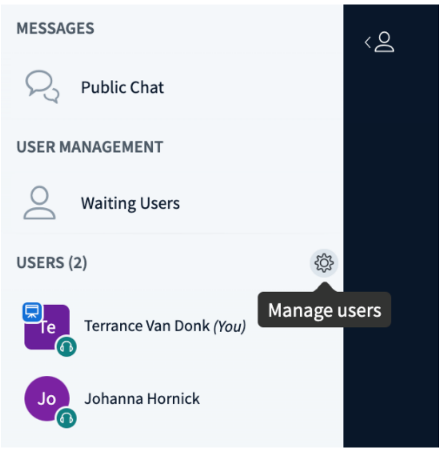
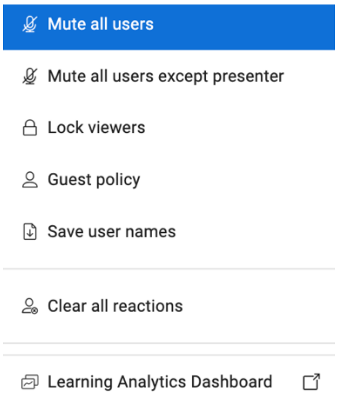
17. How to remove a user inside the meeting?

If you are the moderator, please follow these steps to remove user from the meeting:

Step 1	Click on a username of the participant you want to remove. 
Step 2	Select from the menu “Remove user” option. 
Step 3	The confirmation pop-up will appear. Press on the “Yes” button if you want to remove the user from the meeting. 

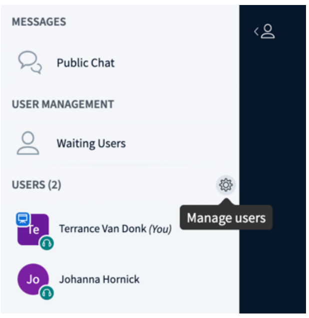
18. How to mute all users inside the meeting?

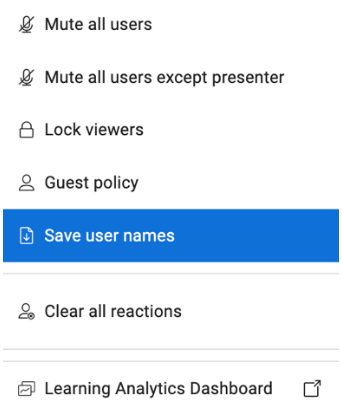
If you are the moderator, please follow these steps to mute all users:

<table>
<tr><td>Step 1</td><td>Click on the “Gear” icon in the left corner.

</td></tr>
<tr><td>Step 2</td><td>Select from the menu “Mute all users” option.

</td></tr>
</table>

19. How to save usernames inside the meeting?

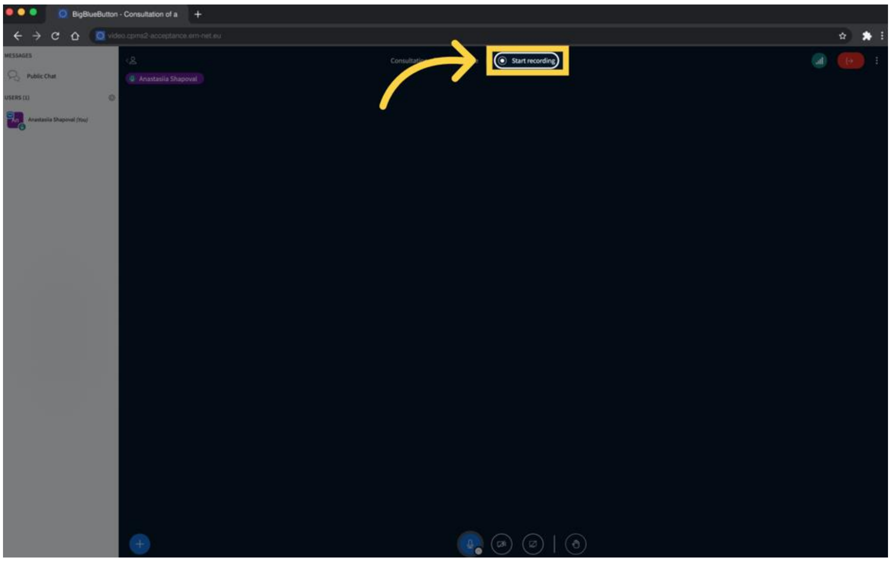
If you are the moderator, please follow these steps to save usernames:

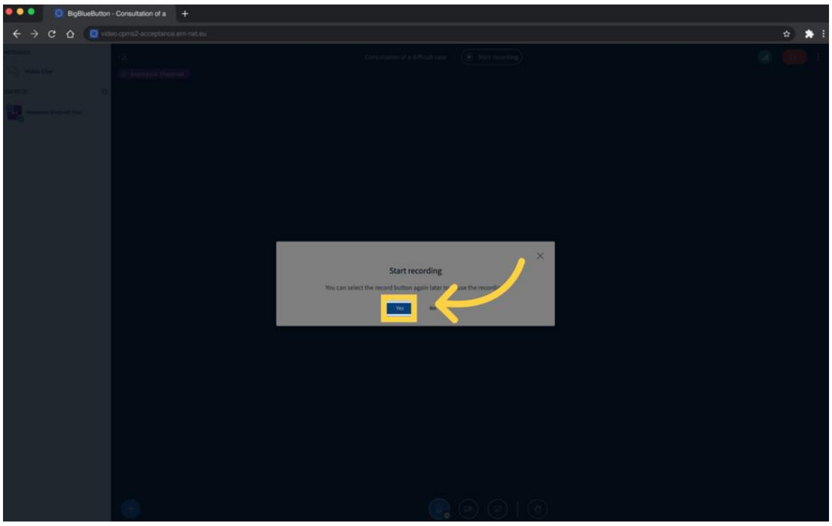
<table>
<tr><td>Step 1</td><td>Click on the “Gear” icon in the left corner.

</td></tr>
</table>

Step 2	Select from the menu “Save usernames” option. 
Step 3	The download process will start.

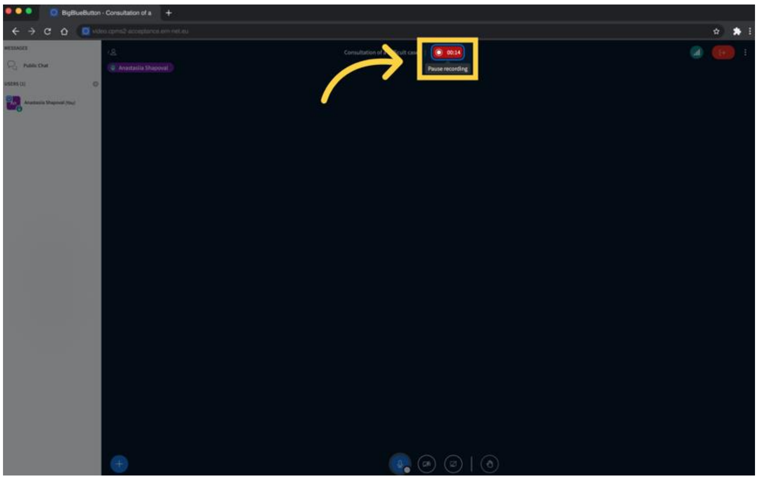
20. How can I start/pause a recording of the meeting?

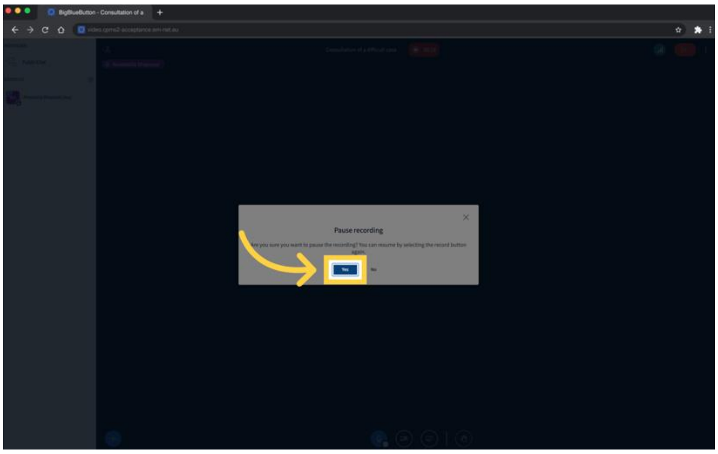
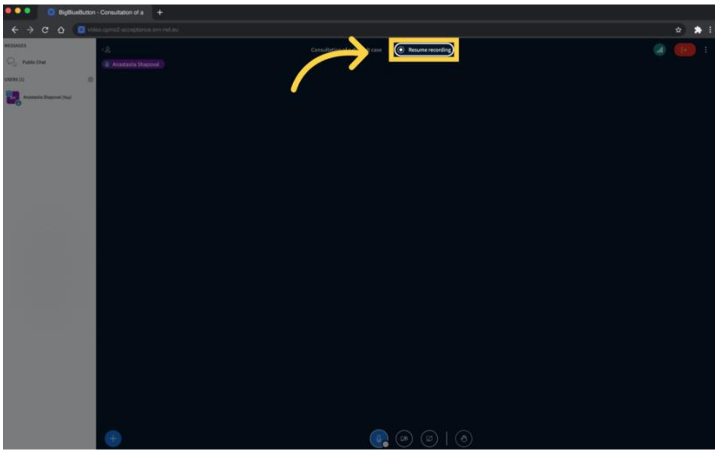
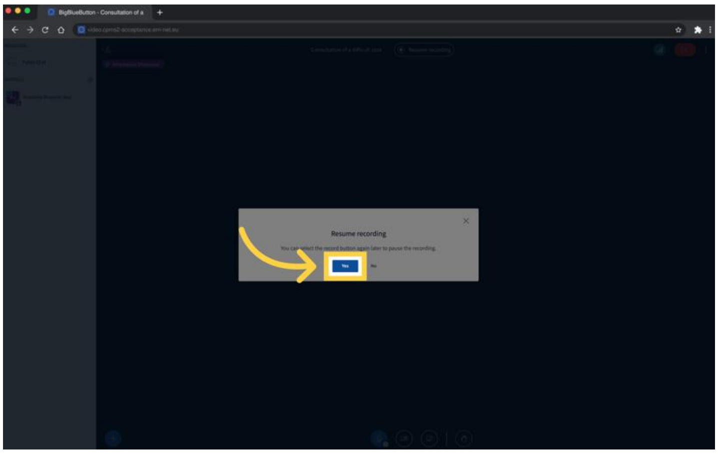
To record the meeting, please follow these steps:

Step 1	When you want to start recording the meeting, click on the "Start recording" button located at the top of the screen. 

<table>
<tr><td>Step 2</td><td>Inside the pop-up click on the “Yes” button to start recording.


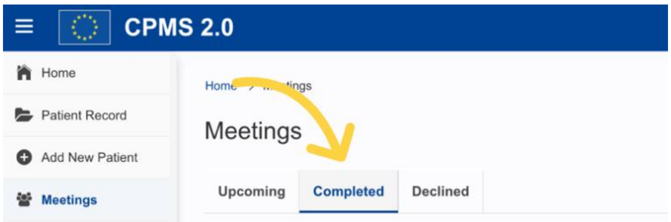
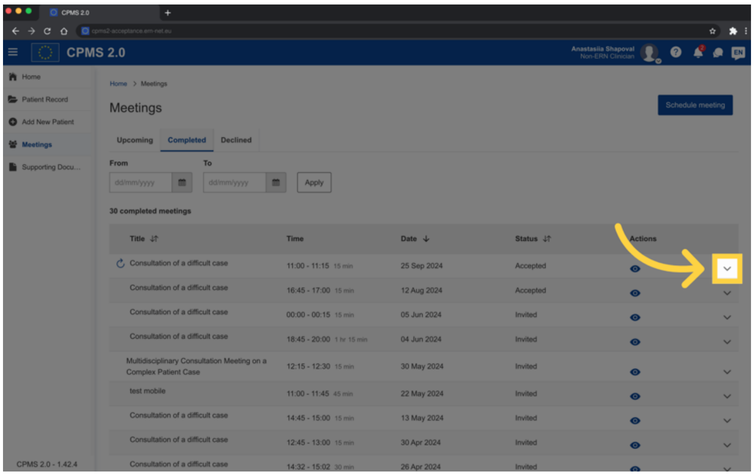
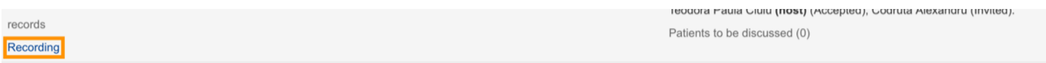
</td></tr>
<tr><td>Step 3</td><td>To confirm that the recording is in progress, a visual indicator (a red dot) will be displayed at the top of the screen.


</td></tr>
<tr><td>Step 4</td><td>When you're ready to pause the recording, click on the "Pause Recording" button, which is located at the top of the screen.

</td></tr>
</table>

Step 5	Inside the pop-up click on the “Yes” button to pause recording. 
Step 6	To resume recording, click on the "Resume Recording" button, which is located at the top of the screen. 
Step 7	Inside the pop-up click on the “Yes” button to resume recording. 

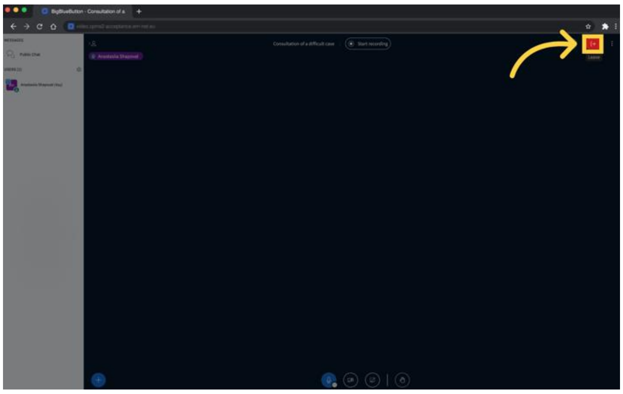
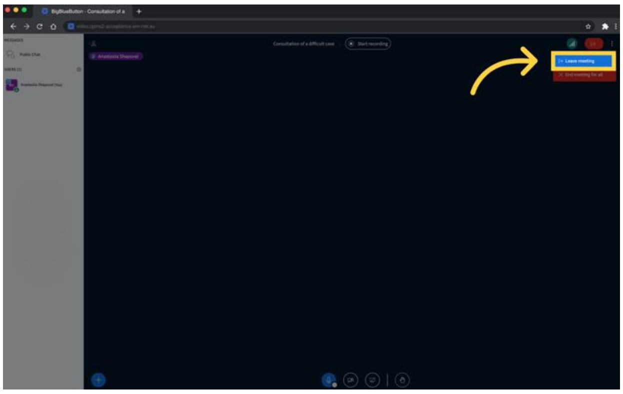
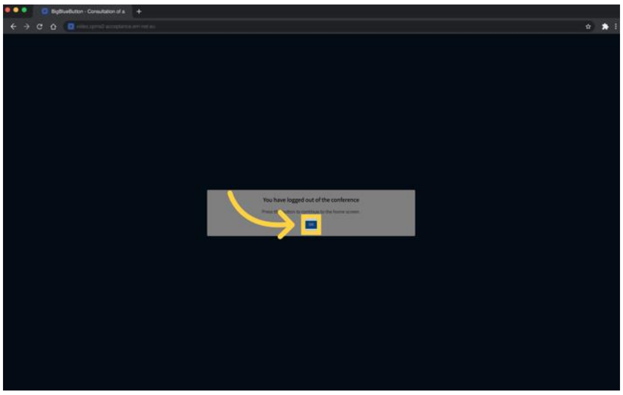
21. How can I access saved recording of the meeting?

To view saved recording of the meeting, please follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".
Step 3	In the "Completed" tab, find the specific meeting you want to see the recording for . 
Step 4	Click on the arrow inside the action column in the table for the desired meeting. 
Step 5	Click on the “Recording” label to view the recording. 

22. How can I leave the meeting?

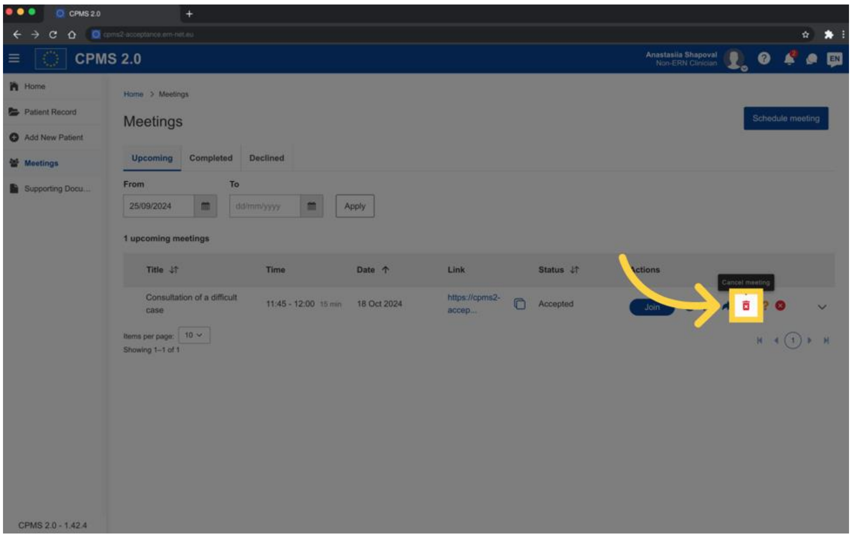
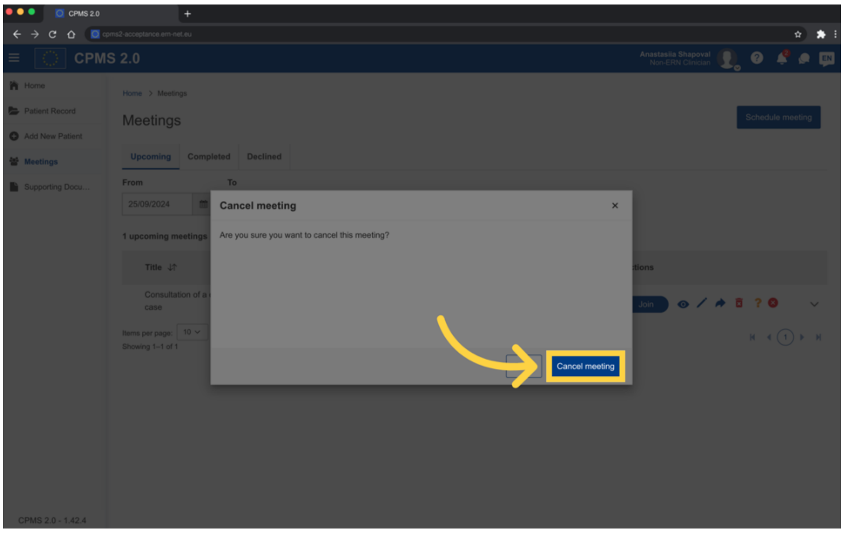
To leave the meeting, please follow these steps:

Step 1	When you wish to leave the meeting, click on the red icon that is located on the top right corner of the screen. 
Step 2	Choose "Leave meeting". 
Step 3	Click on the "OK" button. 

23. How can I cancel a meeting that I have created?

To cancel an upcoming meeting, please follow these steps:

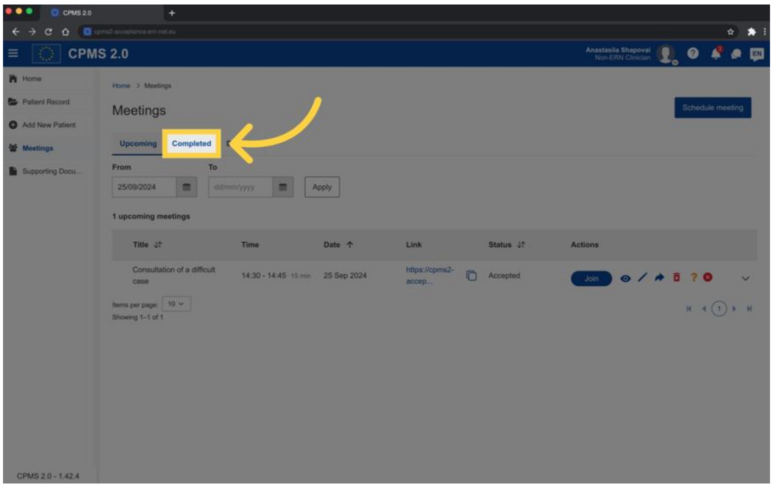
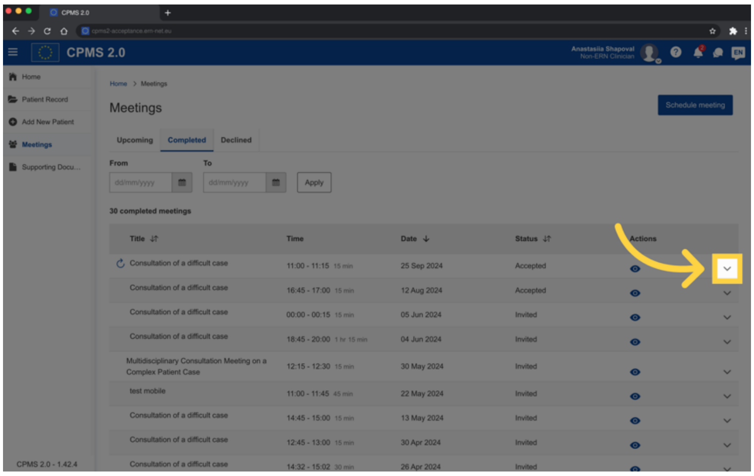
Step 1	Log in to the CPMS 2.0 system using your credentials.

Step 2	From the left-hand side menu, select "Meetings".
Step 3	In the "Upcoming" tab, find the specific meeting you wish to cancel
Step 4	Click on the “Bin” icon inside the action column in the table for the desired meeting. 
Step 5	The pop-up will appear, asking for confirmation. Click on the "Cancel meeting" button if you want to cancel this meeting for all participants. 

24. How do I check for completed meetings in CPMS 2.0?

To check for completed meetings, please follow these steps:

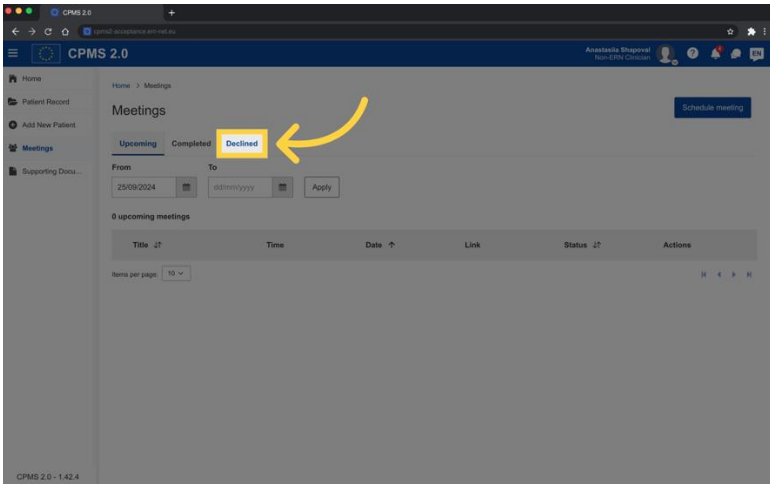
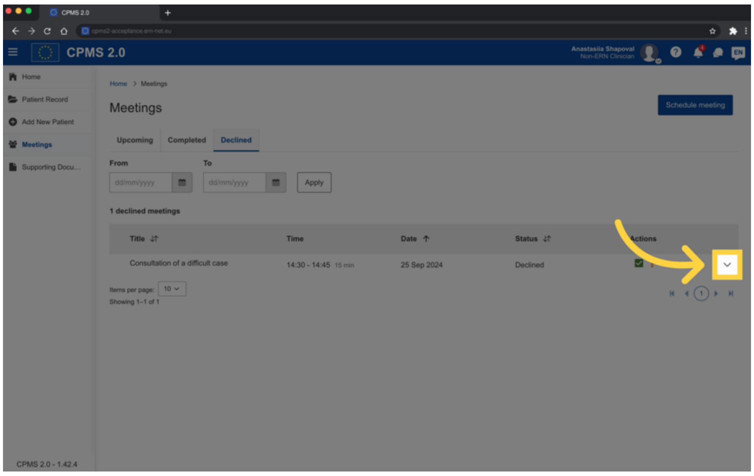
Step 1	Log in to the CPMS 2.0 system using your credentials.

<table>
<tr><td>Step 2</td><td>From the left-hand side menu, select "Meetings".</td></tr>
<tr><td>Step 3</td><td>Switch to the "Completed" tab.

</td></tr>
<tr><td>Step 5</td><td>You will find a list of all past meetings, along with options to view participants and agenda using an arrow inside the action column in the table.

</td></tr>
</table>

25. How do I check for declined meetings in CPMS 2.0?

To check for declined meetings, please follow these steps:

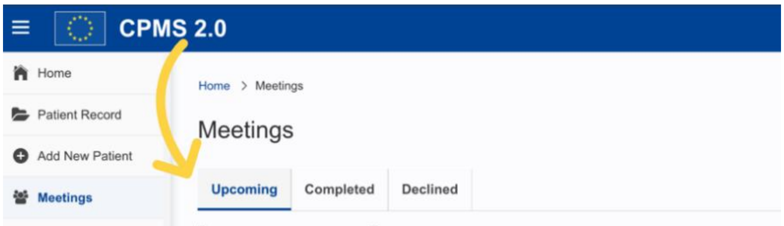
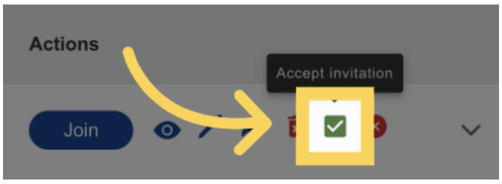
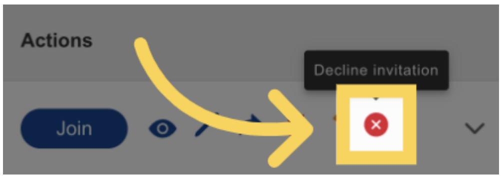
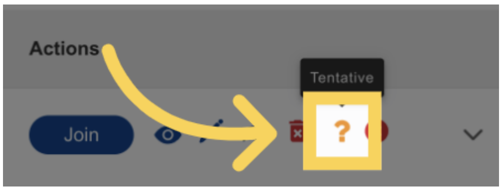
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".

Step 3	Switch to the "Declined" tab. 
Step 5	You will find a list of all declined meetings, along with options to view participants and agenda using an arrow inside the action column in the table. 

26. How can I accept or refuse a meeting from app?

You can respond to an invitation within CPMS 2.0 by following these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".

Step 3	In the "Upcoming" tab, find the specific meeting you wish to respond to. 
Step 4	You have the option to "Accept," "Decline," or "Tentative" the invitation within the "Actions" column. Simply click on any of those options to respond to the invitation. • **Accept:** This confirms your attendance at the meeting.  • **Decline:** This indicates that you will not be able to attend.  • **Tentative:** This means you are unsure about your availability and may need to confirm later. 

27. How can I accept or refuse a meeting from an e-mail client (Outlook, Gmail)?

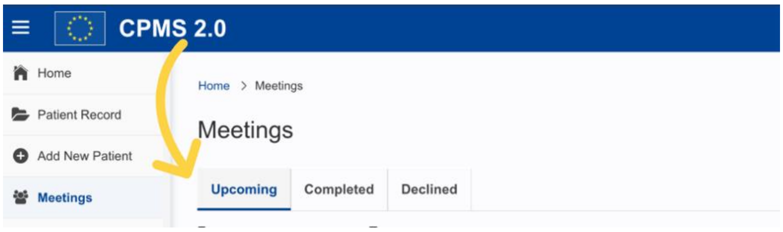
Within your email client (like Outlook or Gmail), you have the option to accept, decline, or tentatively accept a meeting invitation. To take one of these actions, follow the steps below:

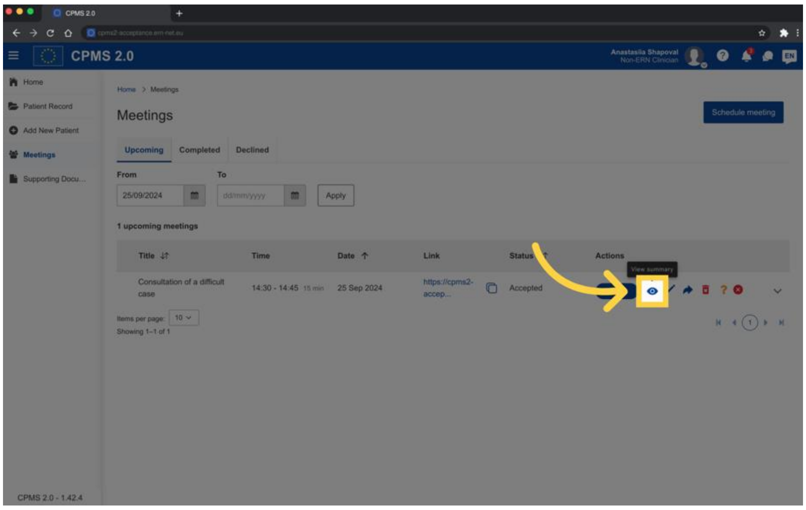
Step 1	Locate the meeting invitation in your inbox and open it.

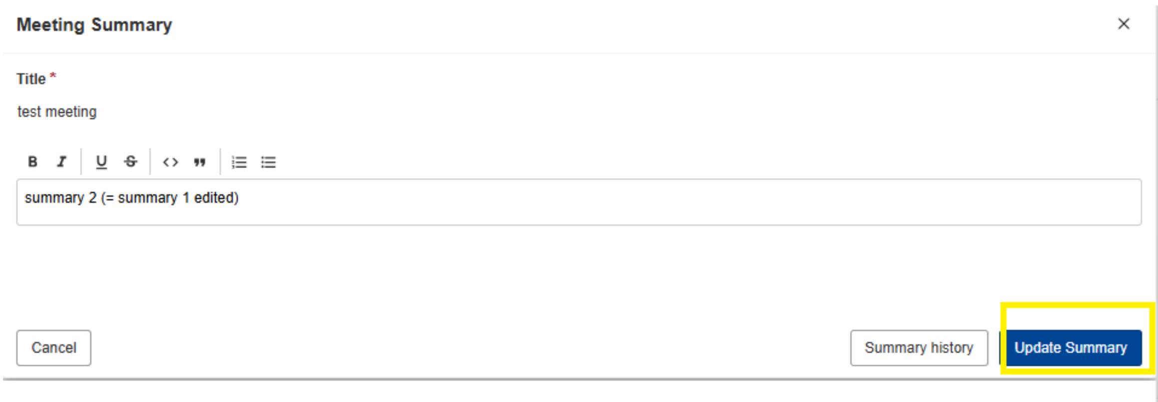
Step 2	Choose your response. Click on one of the following buttons at the top of the meeting window: • **Accept:** This confirms your attendance at the meeting. • **Decline:** This indicates that you cannot attend the meeting. • **Tentative:** This suggests that you might attend but are unsure.
Step 3	If you want to provide an explanation for your response, you can add a note in the "Reply" section.
Step 4	Click the "Send" button to send your response to the meeting organizer.

28. How can I update the summary of the meeting?

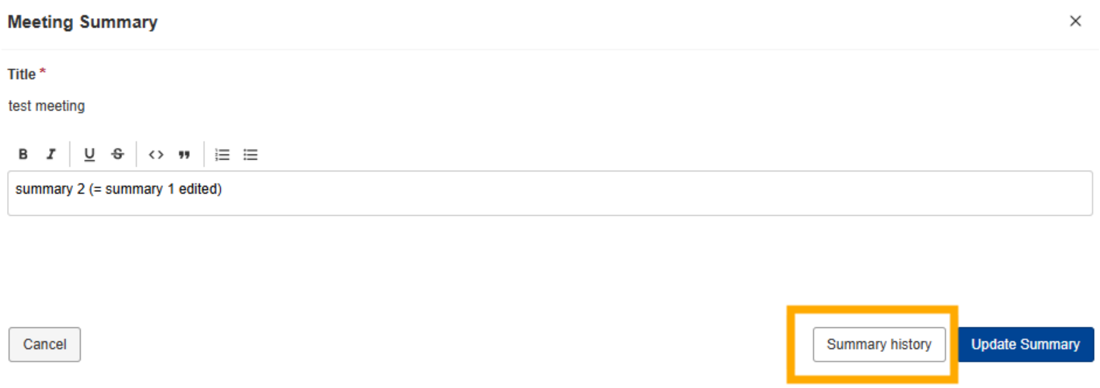
To update summary of the meeting, please follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".
Step 3	In the "Upcoming" tab, find the specific meeting you wish to edit the summary for. 

<table>
<tr>
<td>Step 4</td>
<td>Click on the “Eye” icon inside the action column in the table for the desired meeting.

</td>
</tr>
<tr>
<td>Step 5</td>
<td>Fill in the meeting summary inside the message box.

</td>
</tr>
<tr>
<td>Step 6</td>
<td>Click on the “Update Summary” button.

</td>
</tr>
</table>

<table>
<tr>
<td>Step 7</td>
<td>
You can view the history of the Meeting summary by clicking the “Summary history” button.



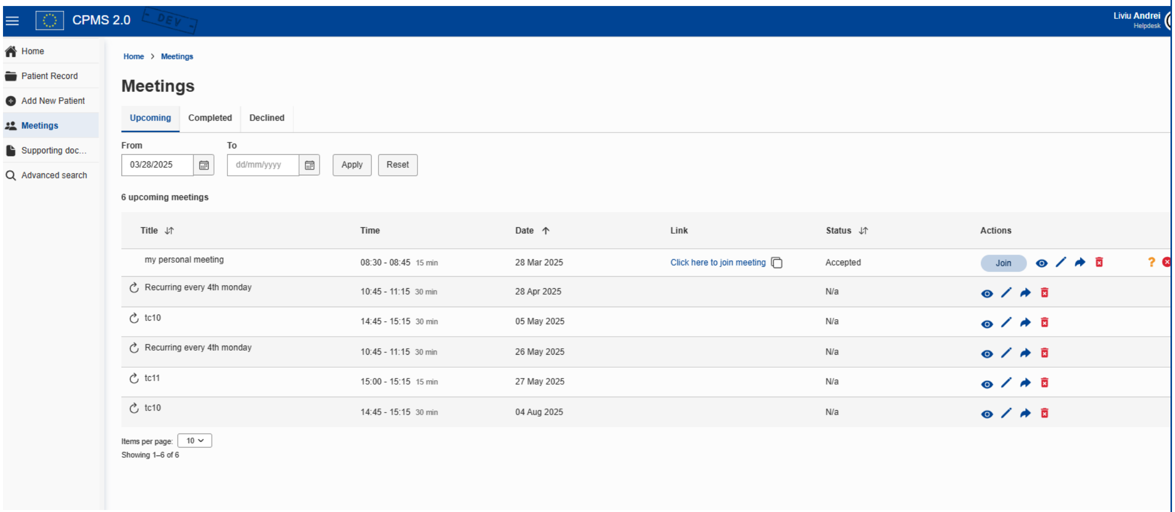
This will open a new tab in which all the historical versions of the summary are displayed, starting with the most recent one. For each version, the user who created it and the time of creation are displayed.

</td>
</tr>
</table>

29. Can a helpdesk manage meetings from his ERN?

If you are an user with helpdesk role you can manage meetings hosted by users from your ERN, by following these steps:

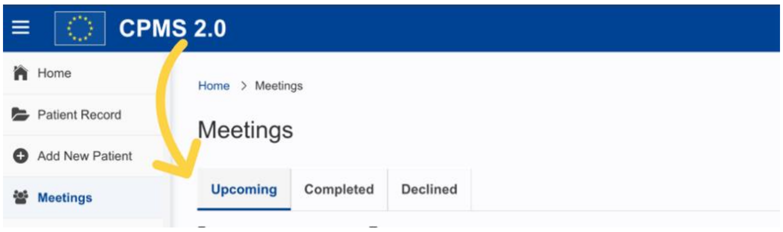
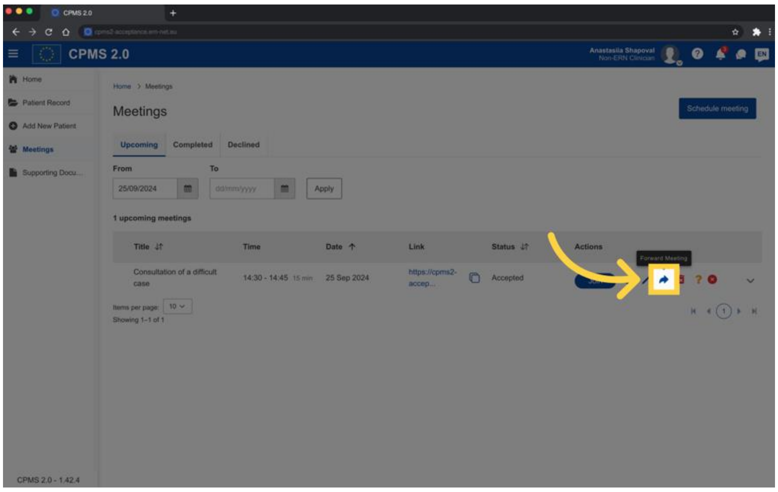
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".

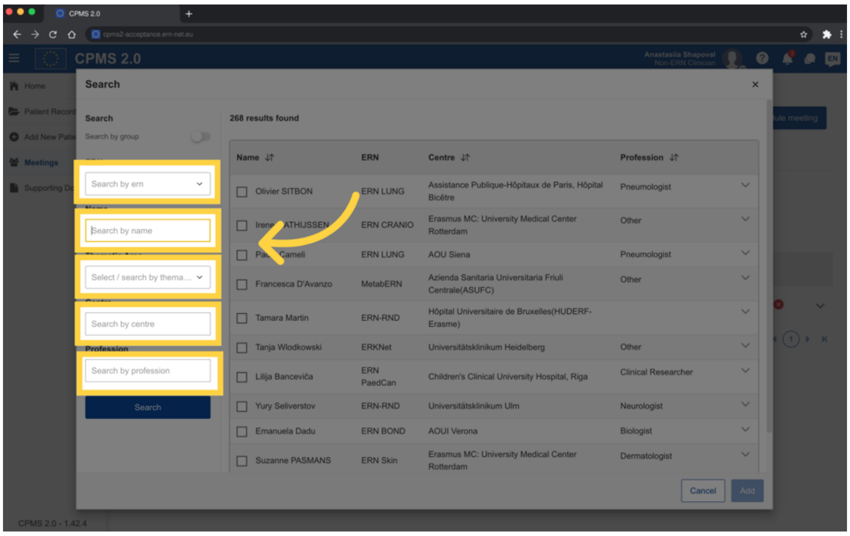
Step 3	Check the “Upcoming” and "Completed" tab to see the meetings you are invited and those hosted by users from your ERN (for the meetings hosted by users from your ERN in which you are not invited you will see “N/a” in the column status): 
Step 4	On the meetings you are seeing because they are hosted by users from your ERN you can do the following actions: - Edit meeting - Forward meeting - View meeting summary - Delete meeting In case you want to join the meeting as well, you need to add yourself as a participant by editing the meeting.

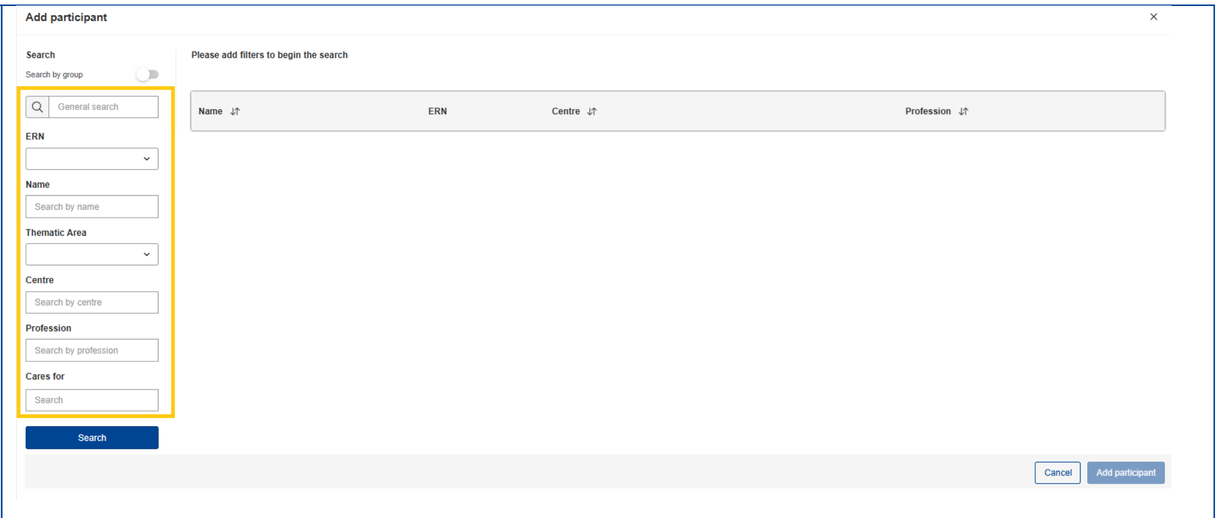
30. How to forward a meeting to a colleague?

To forward the meeting, please follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	From the left-hand side menu, select "Meetings".

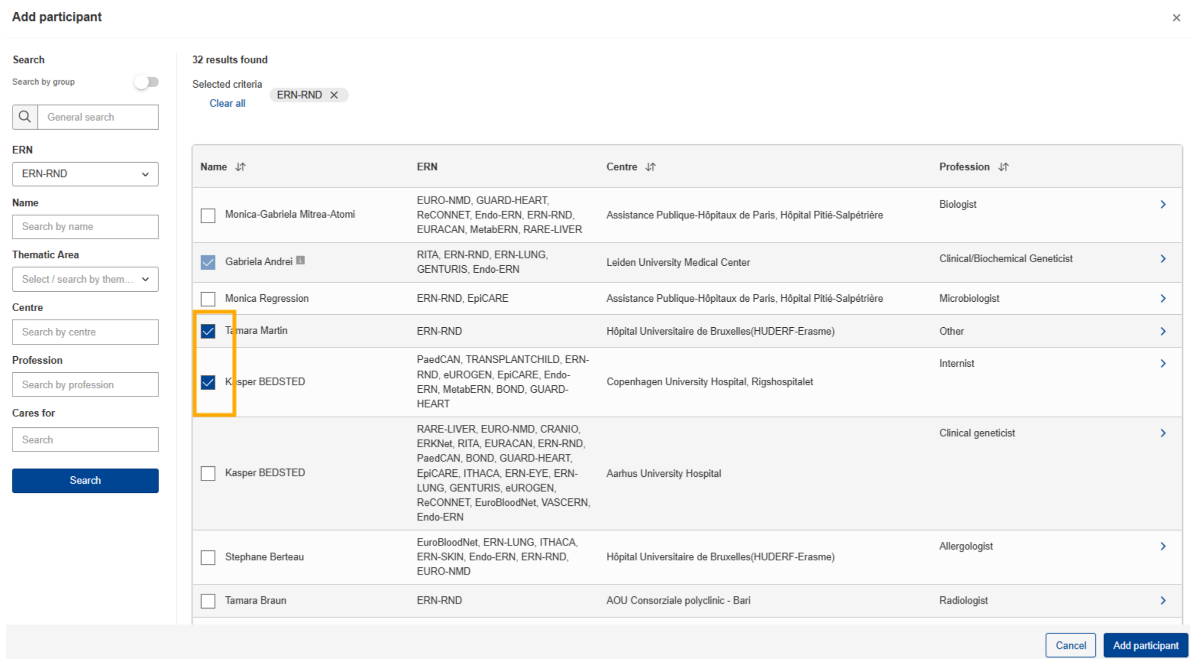
Step 3	In the "Upcoming" tab, find the specific meeting you wish to forward. 
Step 4	Click on the “Arrow” icon inside the action column in the table for the desired meeting. 

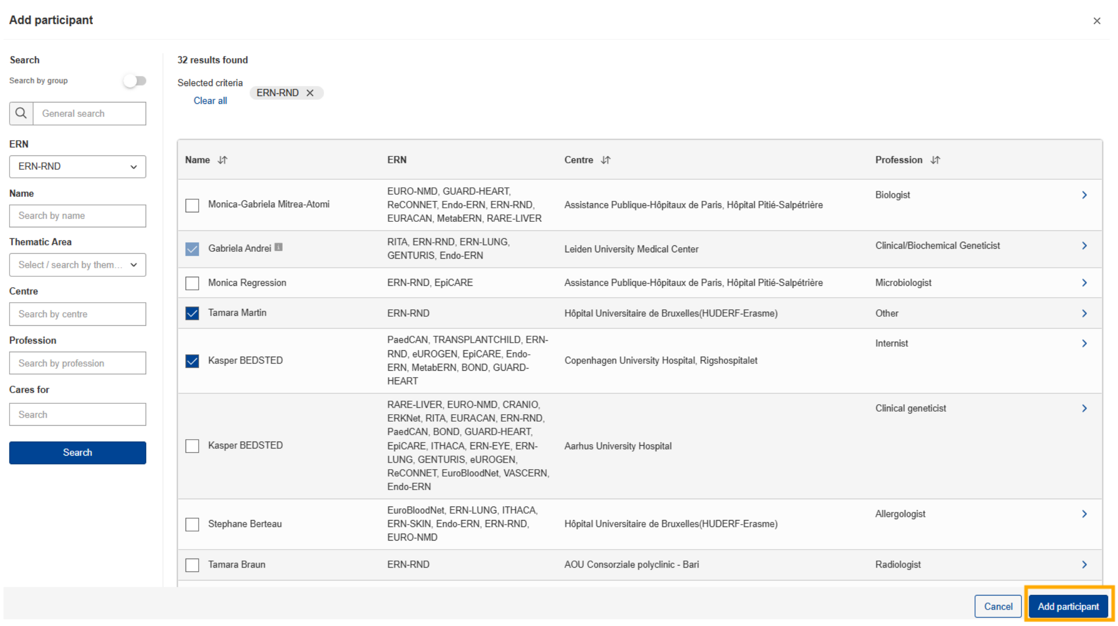
Step 5	To find the right experts to invite to the meeting, you can search across all European Reference Networks (ERNs). The search panel allows you to refine your search by selecting from the following options: - Search by group: Check the toggle to view list of groups. When searching by groups, you can limit your search to the groups with the same ERN(s) as yours, to all groups that are ERN-specific and/or to all cross-ERN groups. - - General search: Searches is all characteristics of a user (first and last name, email, EULogin user name, language, country, timezone, thematics, subthematics, clinical focus, ERN, HCP, roles, profession). The “+” symbol can be used to search for multiple criteria - ERN (European Reference Network): Choose the specific ERN from the drop-down menu. - Name (First or Last Name): Enter the clinician's name in the text field. - Thematic Area: Select the thematic area from the drop-down menu. If you have previously filtered by ERN, only the related thematic areas will be displayed. - Center: Enter the center's name in the text field to find clinicians from a specific medical center. - Profession: Choose the profession from the drop-down menu to find clinicians based on their roles. 



Step 6

Select the colleague you want to add from the list.



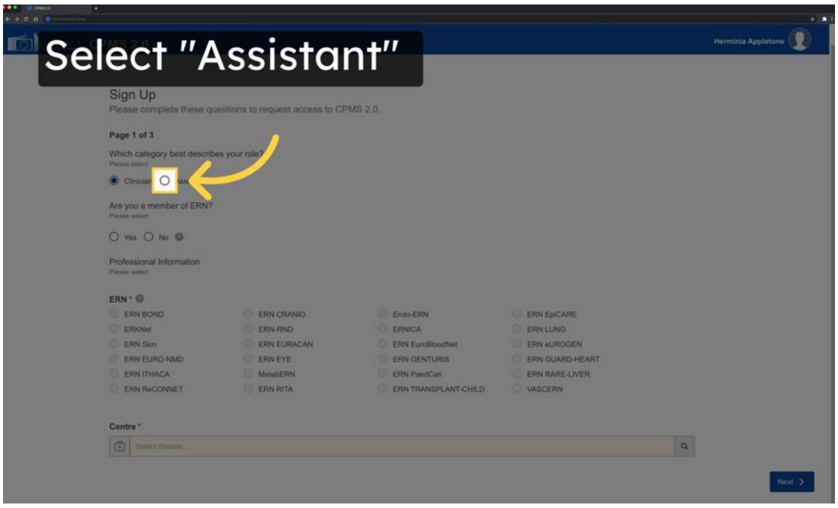
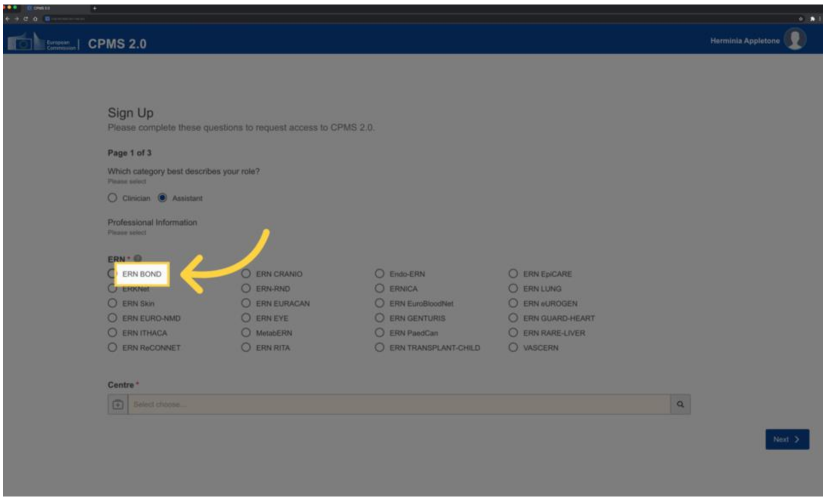
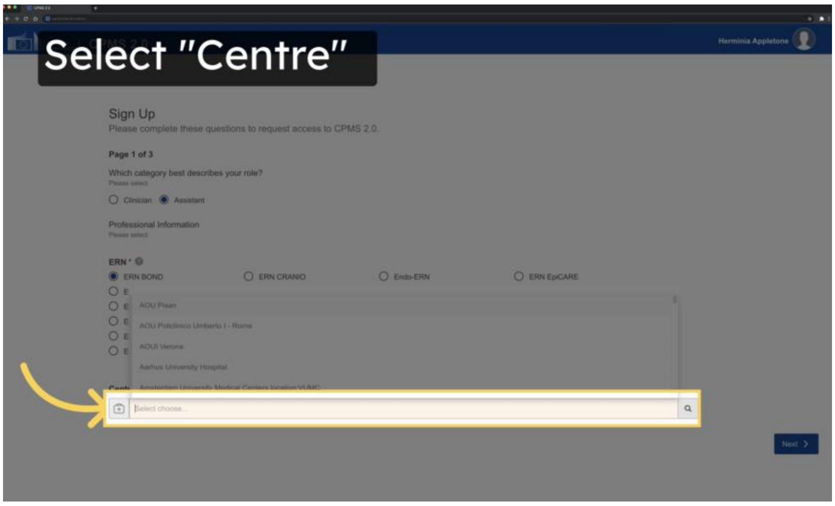
Step 7	Press on the “Add” button. 

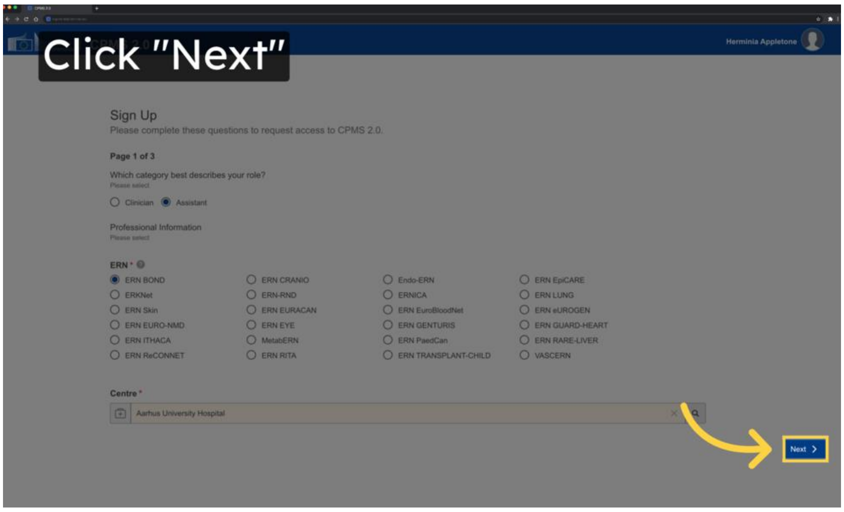
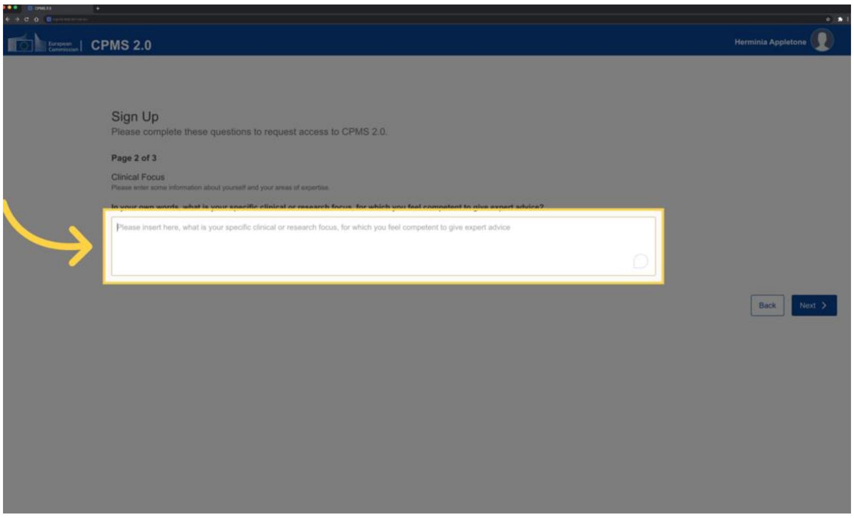
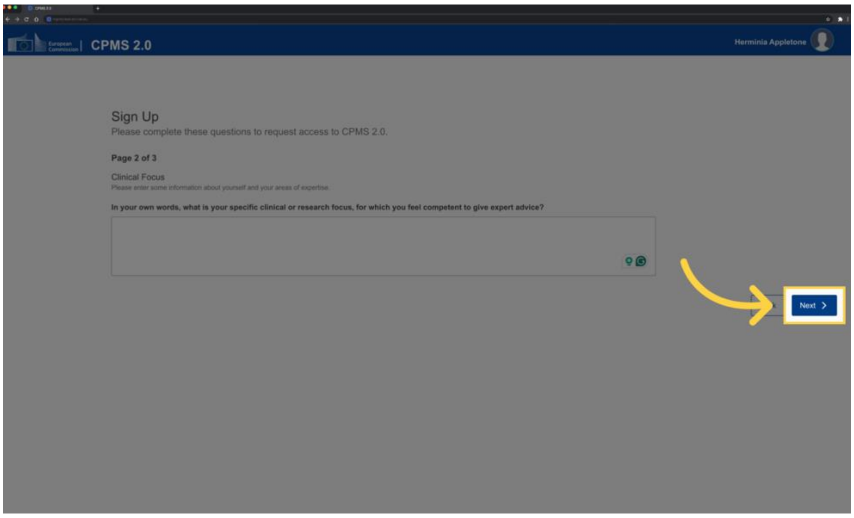
G. Assistant

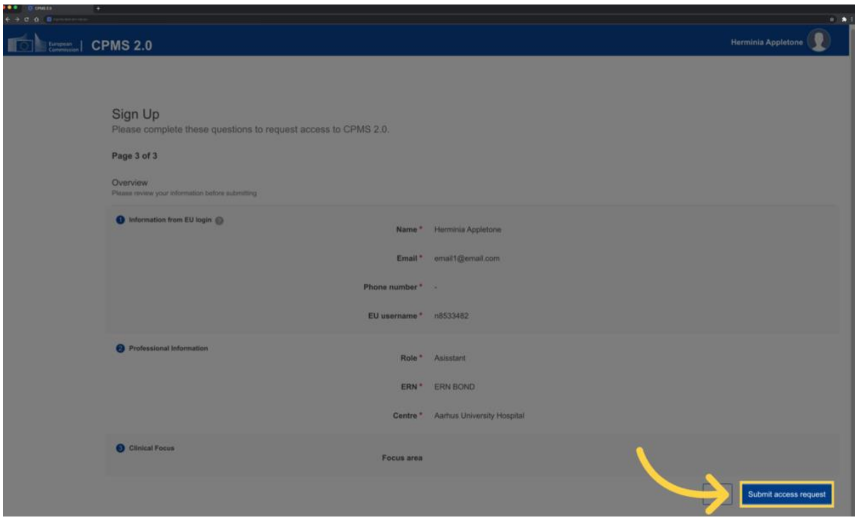
1. How to Sign-Up for CPMS 2.0 as an assistant?

To sign up as an assistant in CPMS, follow these steps:

Step 1	Access the CPMS 2.0 from the public landing page.
Step 2	Click the "Sign In" button.
Step 3	Ensure EU Login process is completed, including email/user ID, password, and dual-factor authentication.
Step 4	You will be redirected to the Sign-Up screen.

<table>
<tr><td>Step 5</td><td>Page 1/3: Select your role as "Assistant" and proceed to the next question.

</td></tr>
<tr><td>Step 6</td><td>Select your ERN from a list of predefined options.

</td></tr>
<tr><td>Step 7</td><td>Choose your Centre from a list of options.

</td></tr>
</table>

<table>
<tr><td>Step 8</td><td>Click “Next” button.

</td></tr>
<tr><td>Step 9</td><td>In "Your own words, tell us about yourself and your areas of expertise" field provide relevant information.

</td></tr>
<tr><td>Step 10</td><td>Click “Next” button.

</td></tr>
</table>

<table>
<tr>
<td>Step 11</td>
<td>Review your information and click "Submit access request."


</td>
</tr>
</table>

Your request status changes to 'submitted,' and you'll be notified once approved.

2. What does the blue icon located next to the patient's nickname mean?

If you are assigned as an assistant for a clinician from your hospital, you will be able to see a blue icon located next to the patient's nickname. This icon indicates that you have been granted access to the patient's records and can act on behalf of the clinician who added you as an assistant.

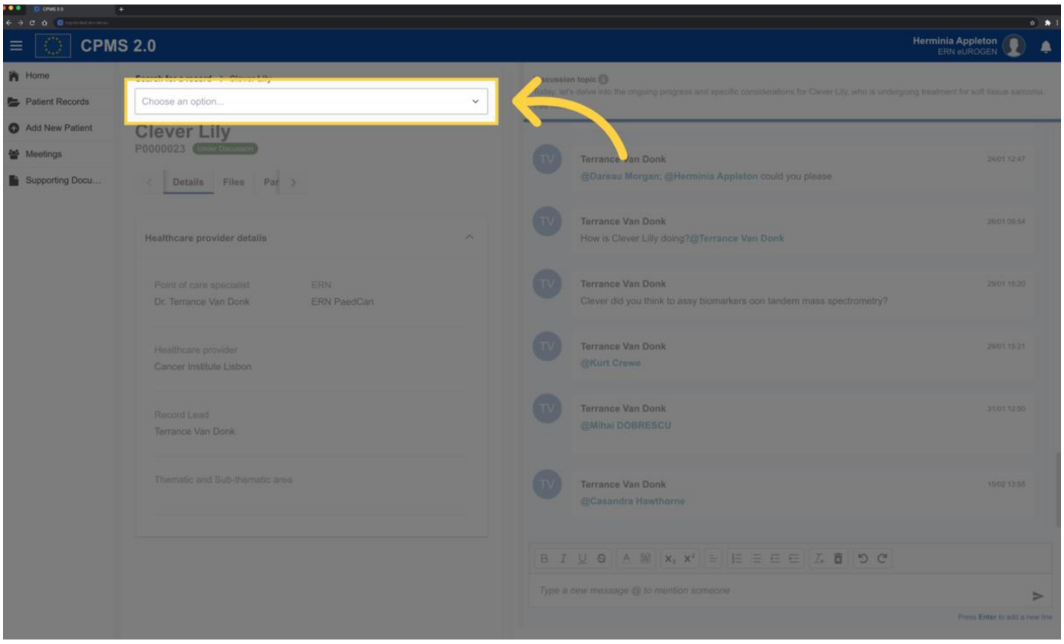
To perform any action related to the patient, such as writing messages or uploading/viewing files, you will need to select the name of the clinician who added you as an assistant. Once you select the name of the clinician, you will be able to access the patient's records and perform any necessary tasks.

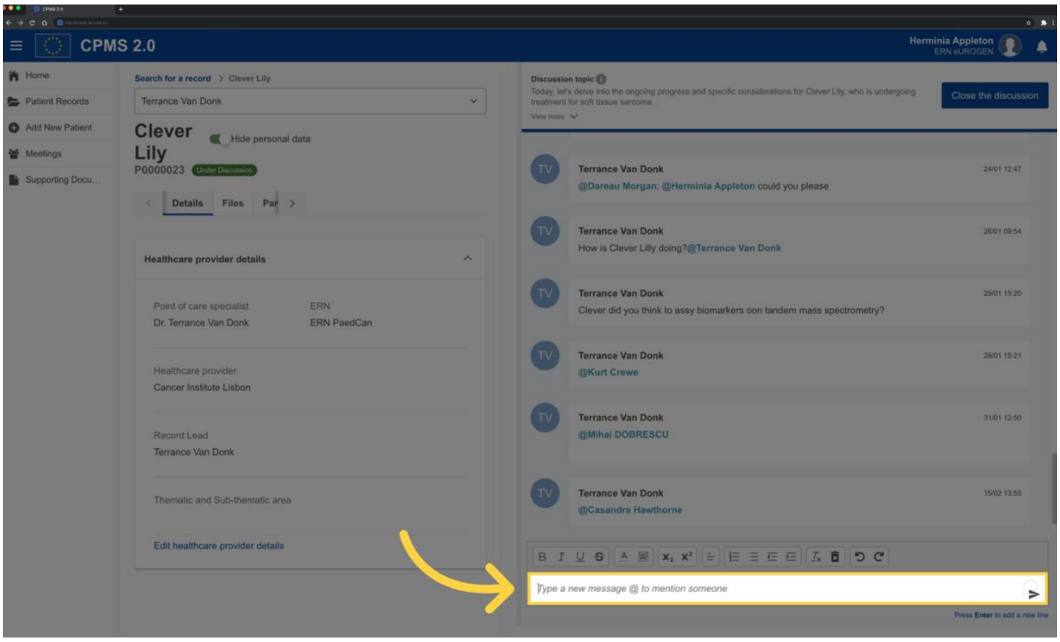
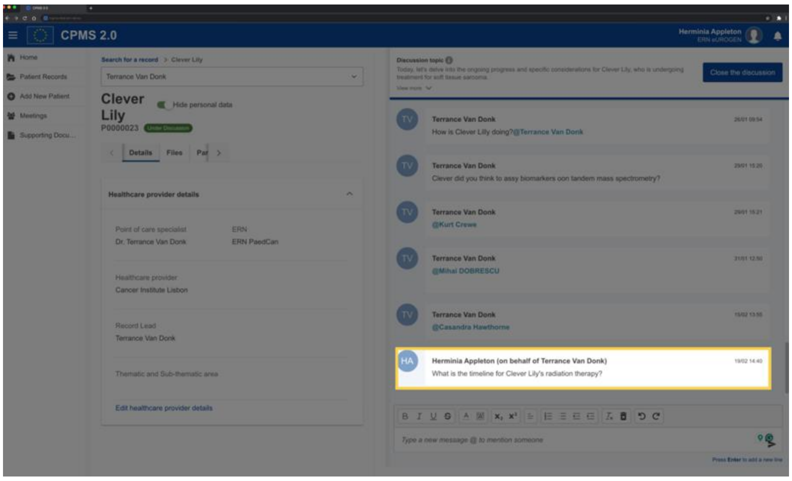
Nickname	ID	Thematic Area	HCP Name	Record Lead	Status	Last updated	Actions
Birut Waddle 737	P0000164	Rare Multisyste...	AZ Sint-Marteen	Terrance Van Donk	Under Discussion	24 days ago	
Clever Lily	P0000023		Cancer Institute Lisbon	Terrance Van Donk	Under Discussion	4 days ago	
Jacob Braun 41	P0000166	Rare Multisyste...	Hospital Universitari Vall d'Hebron	Terrance Van Donk	No Discussion	24 days ago	
Schubert Davide 63	P0000167	Rare Multisyste...	Pediatric hospital Bambino Gesù, Rome	Terrance Van Donk	No Discussion	20 days ago	

3. How can I write a message on behalf of the clinician?

If you are assigned as an assistant for a clinician from your hospital, you will be able to see a blue icon located next to the patient's nickname. This icon indicates that you have been granted access to the patient's records and can act on behalf of the clinician who added you as an assistant.

To write a message on behalf of the clinician, follow these steps:

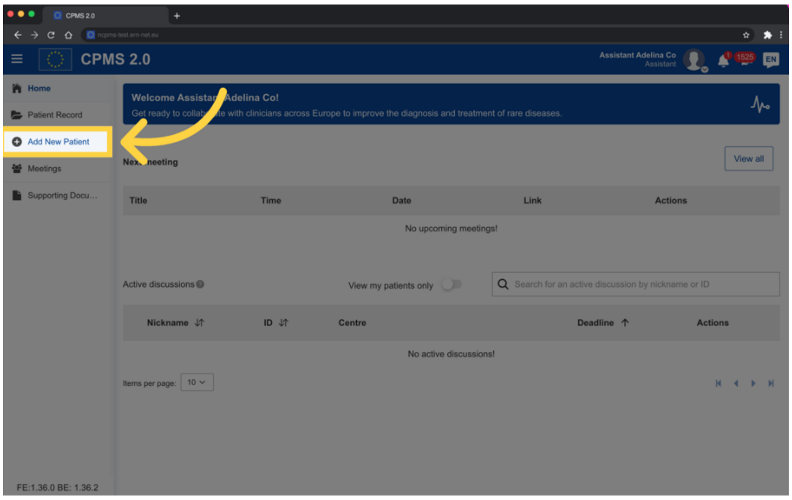
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Access the "Patient Records" page from the left-hand side menu.
Step 3	Look for a patient with an active discussion. You can do this by searching for the patient's name or by sorting the patient's "Status" column by the "Under discussion" label.
Step 4	Once you've found the patient, navigate to their record page with a status of "Under discussion". Click on their name to access their details.
Step 5	On the left-hand side of the patient's details, you will be able to select who you want to act on behalf of. 

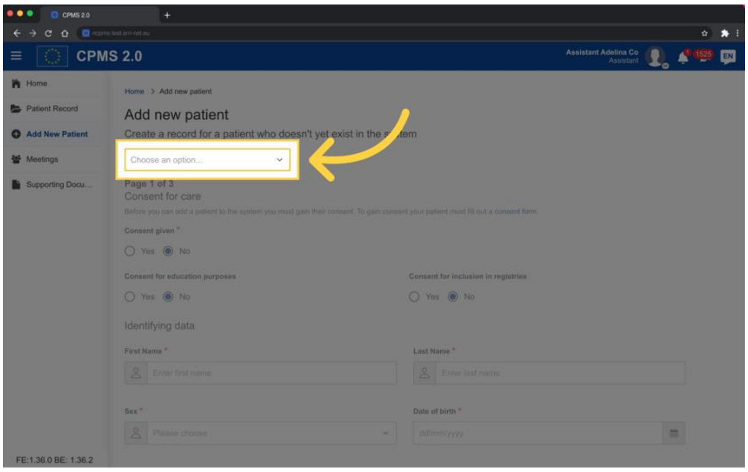
<table>
<tr><td>Step 6</td><td>Write and send a message inside the discussion.

</td></tr>
<tr><td>Step 7</td><td>The message will display your name in the following format to indicate that you are acting on behalf of the clinician:
</td></tr>
</table>

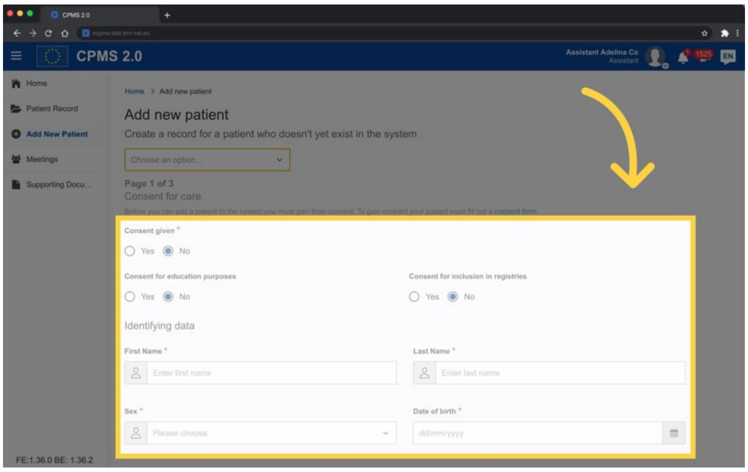
4. How can I create a patient on behalf of the clinician?

If you are assigned as an assistant for a clinician from your hospital, to create a new patient in CPMS 2.0, please follow these steps:

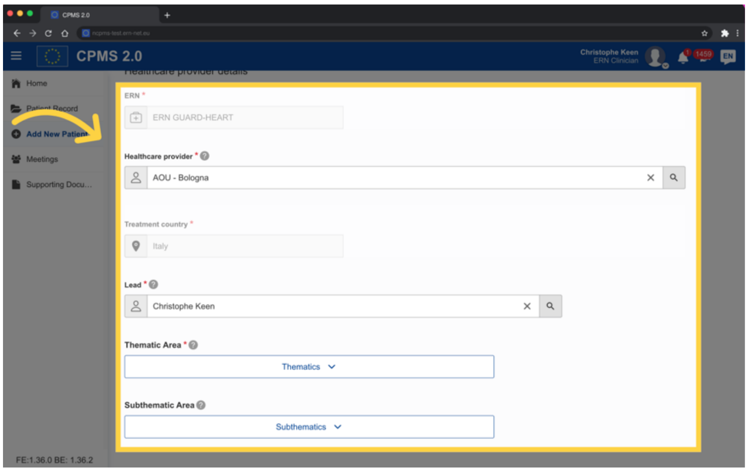
Step 1	Log in to the CPMS 2.0 system using your credentials.

<table>
<tr>
<td>Step 2</td>
<td>From the left-hand side menu, select "Add New Patient".


</td>
</tr>
<tr>
<td>Step 3</td>
<td>You will be able to select who you want to act on behalf of.


</td>
</tr>
<tr>
<td>Step 3</td>
<td>Fill in the patient's identifying data like first name, last name, sex, date of birth, and nationality.


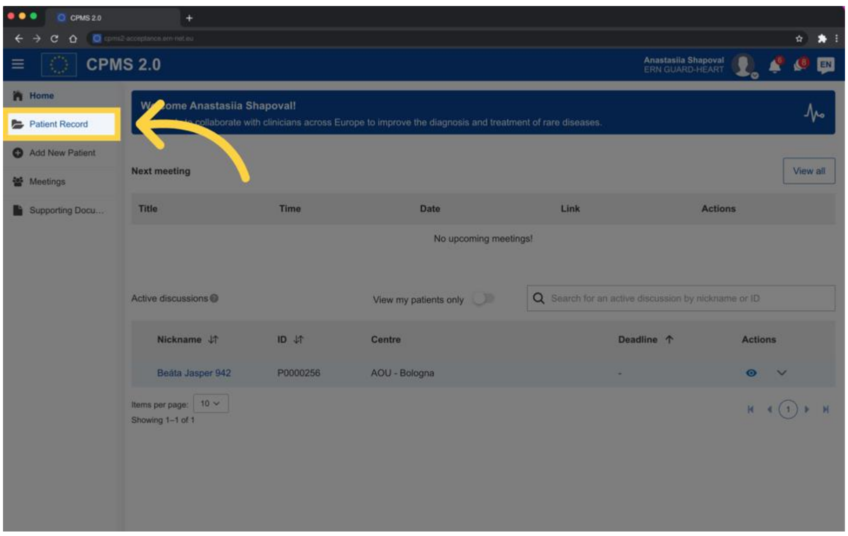
</td>
</tr>
</table>

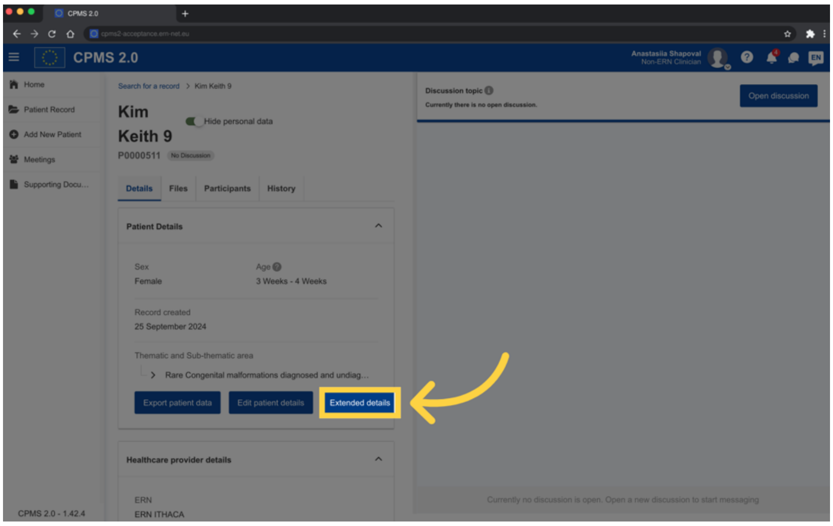
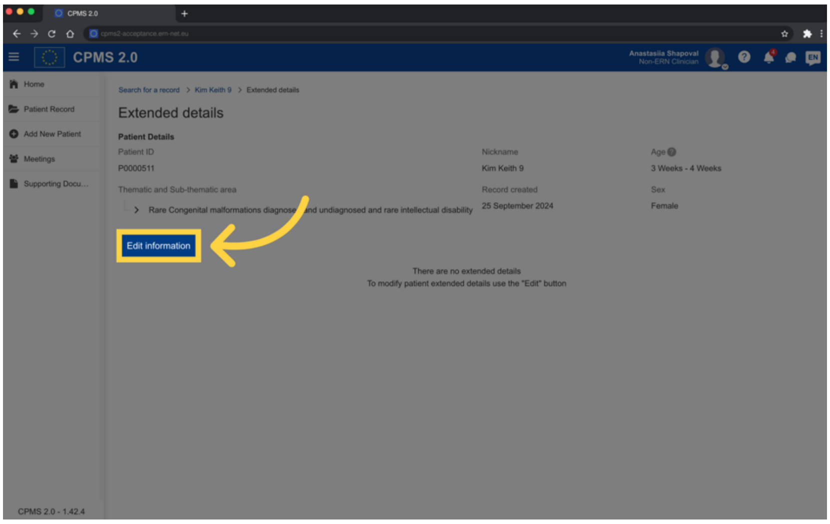
Step 4	Proceed to the next page to generate or validate a nickname, select a healthcare provider, lead, record assistant, thematic area, and sub thematic area. 
Step 5	Review the overview page and confirm the patient creation.

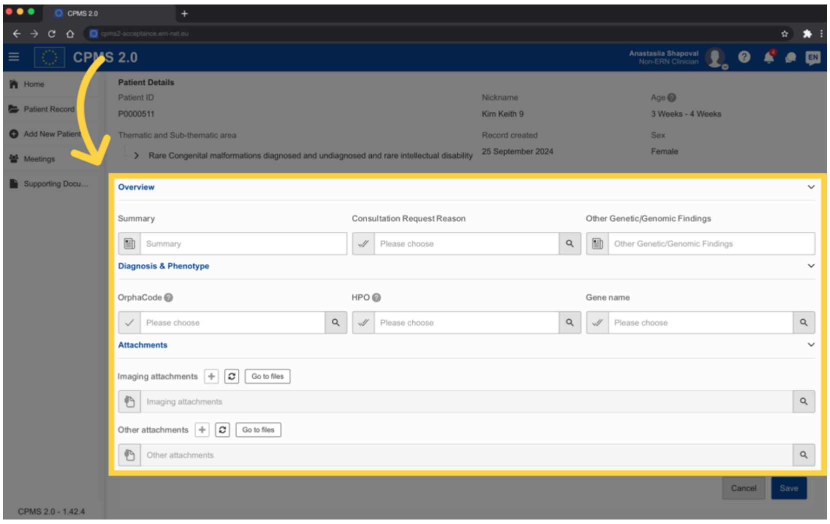
H. Extended details

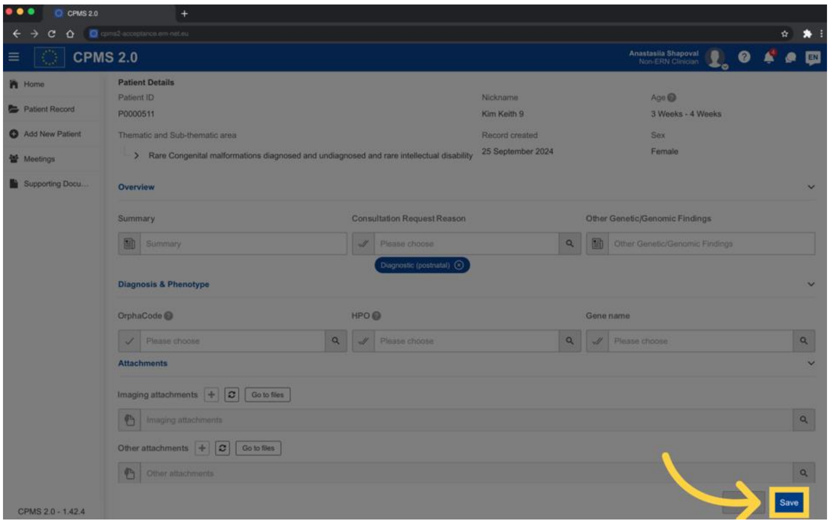
1. How can I edit extended details if I am part of specific ERN's having custom fields?

If you are the lead, follow these steps to edit patient details of your patient:

Step 1	Log in to the CPMS 2.0 system using your credentials. You can make changes to the details of the patient only if you are the lead for that patient. In case you are a participant, you can only view the details.
Step 2	Access the "Patient Records" page from the left-hand side menu. 

<table>
<tr><td>Step 3</td><td>Navigate to the patient profile for which you want to edit extended details. You can do this by either searching for the patient's name in the search bar at the top of the page or by browsing through the list of patients on the page.</td></tr>
<tr><td>Step 4</td><td>Under the “Details” tab click on the “Extended details” button.

</td></tr>
<tr><td>Step 5</td><td>Inside the new page press on the “Edit information” button.

</td></tr>
</table>

<table>
<tr>
<td>Step 6</td>
<td>Inside the edit page update all the needed fields.


</td>
</tr>
<tr>
<td>Step 7</td>
<td>After all the fields are updated click on the “Save” button.


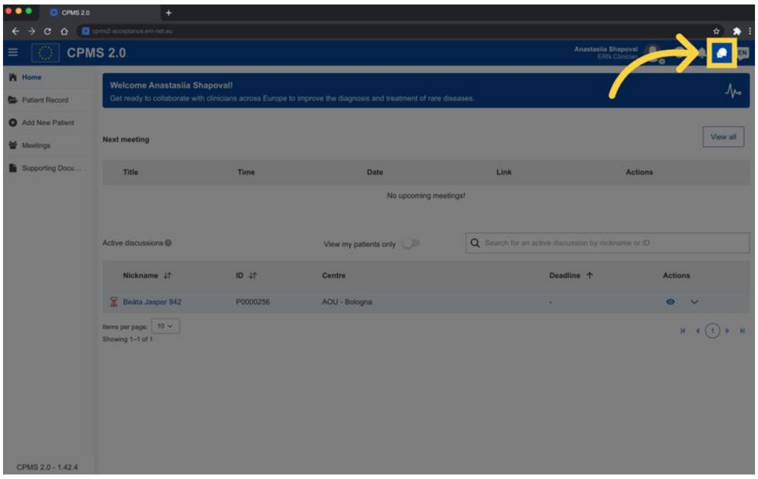
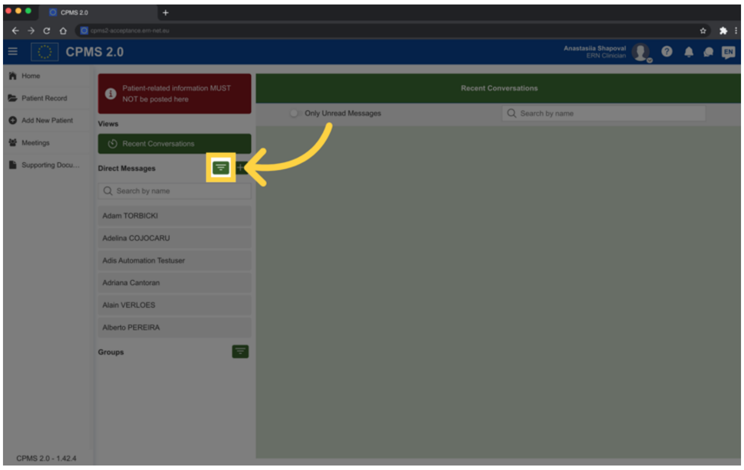
</td>
</tr>
</table>

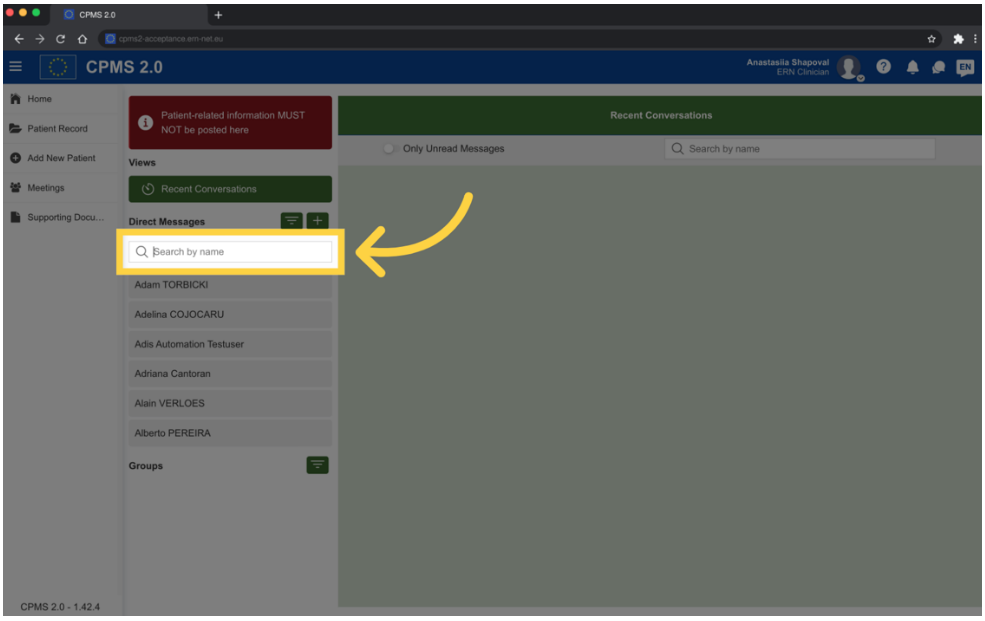
I. One-to-one Chats

1. How to access direct messages inside 1:1 Chats?

Please note that patient related information must not be posted inside 1:1 chats. To access 1:1 chat, follow these steps:

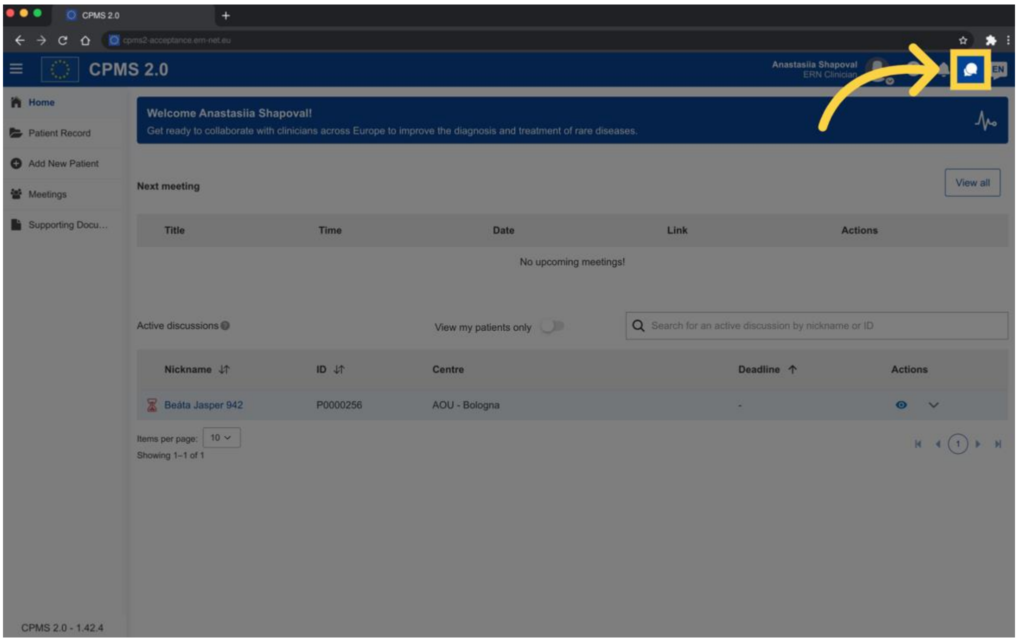
Step 1	Log in to the CPMS 2.0 system using your credentials.

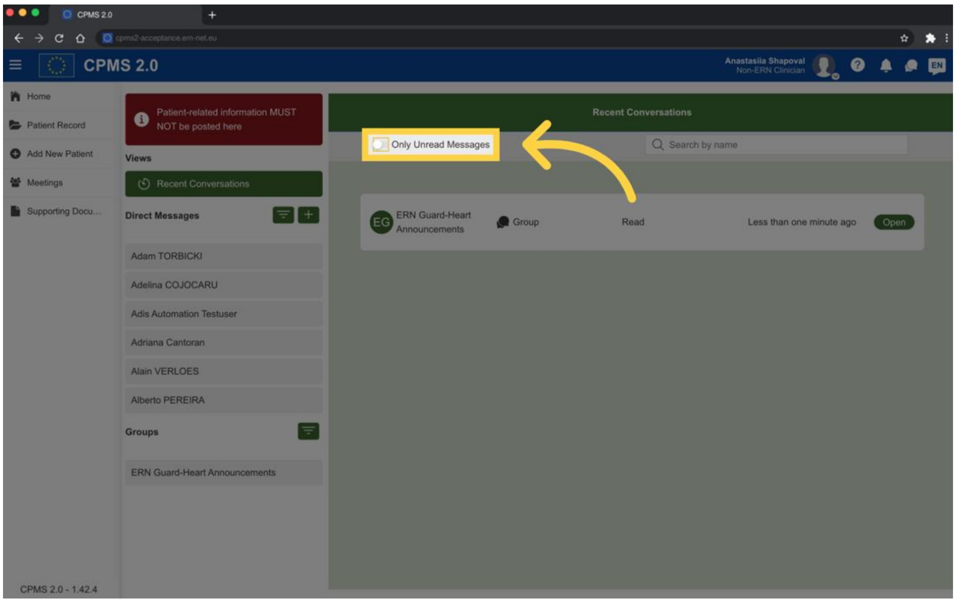
Step 2	Click on the “Messages” icon that is located in the top menu. 
Step 3	Select the name of the person you would like to communicate with inside the “Direct messages” section. To search for a specific person, click on the filter icon. 

Step 4	In the search bar, enter the name of the person. Make sure you enter the correct information to avoid getting incorrect search results. 

2. How to view only unread messages inside 1:1 Chats?

To view only unread messages inside 1:1 chat, follow these steps:

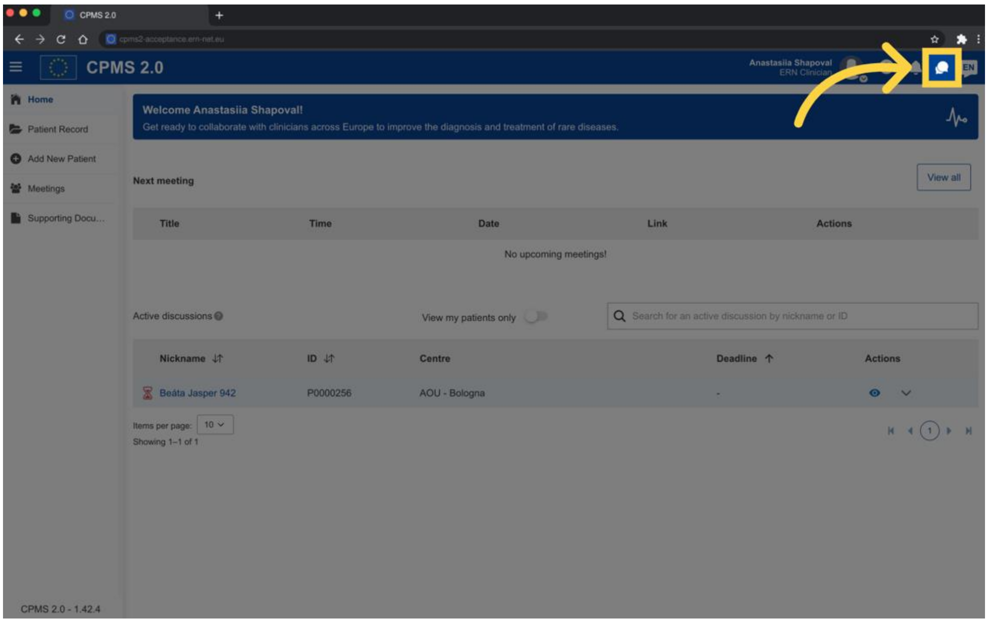
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Click on the "Messages" icon that is located in the top menu. 

<table>
<tr>
<td>Step 3</td>
<td>Under the “Recent Conversations” tab use toggle for “Only unread messages” and switch it to ON.


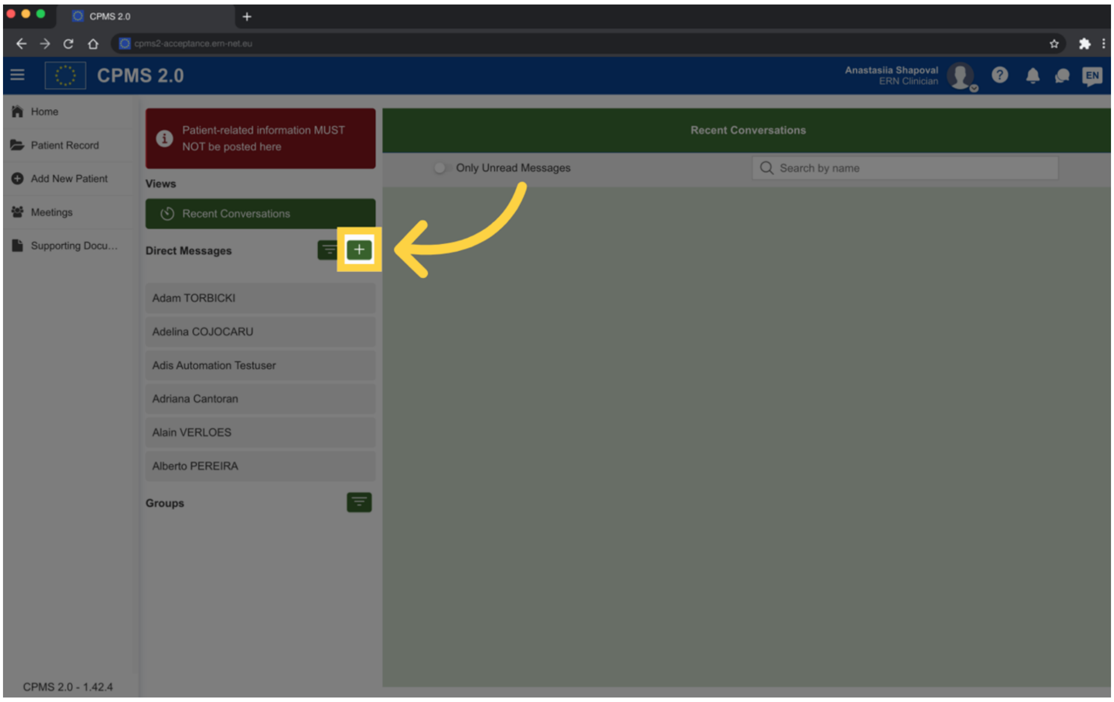
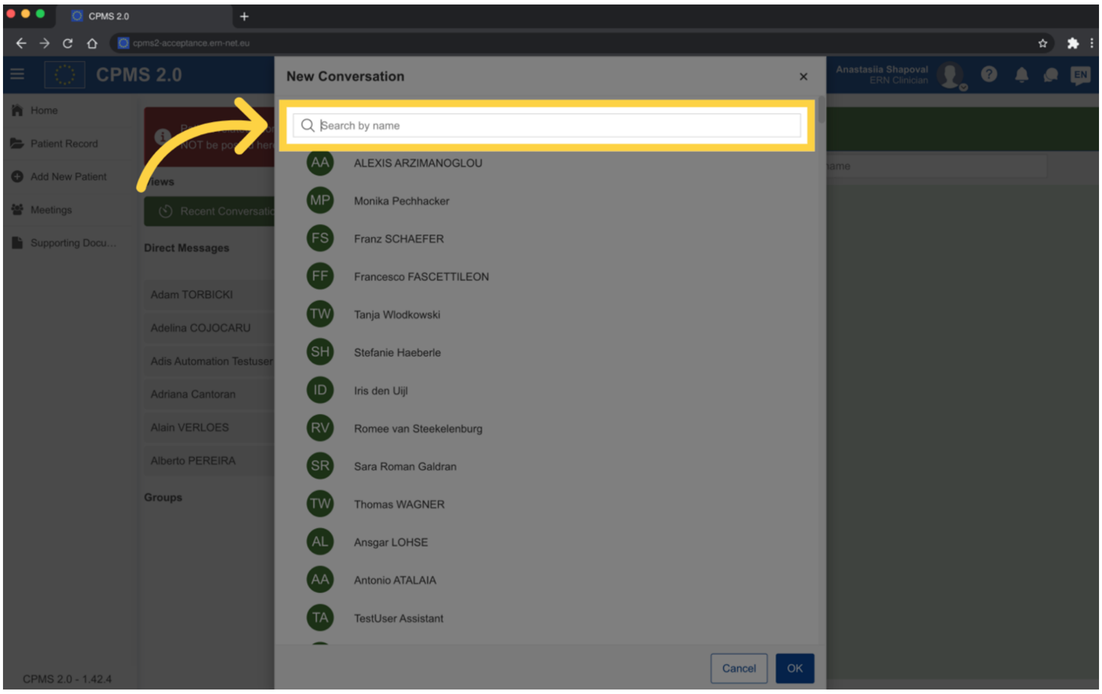
</td>
</tr>
</table>

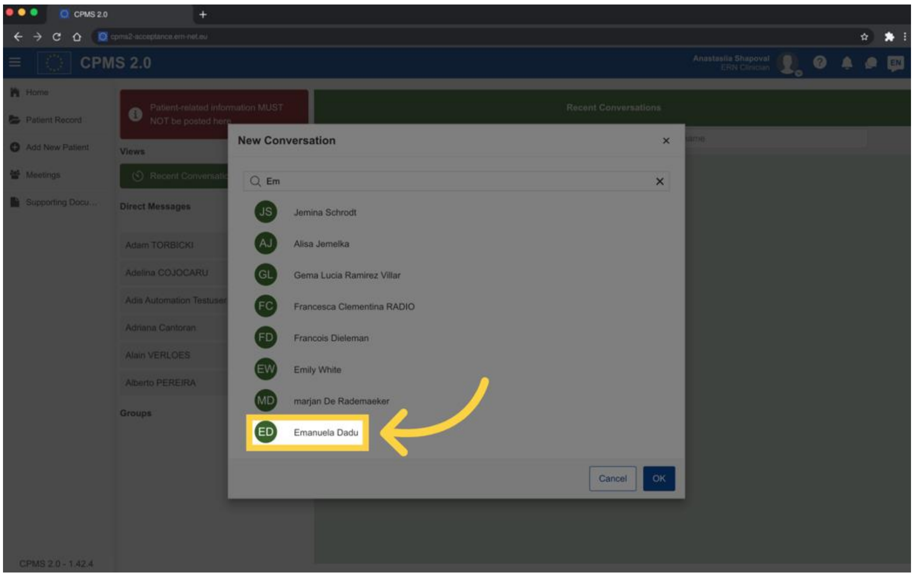
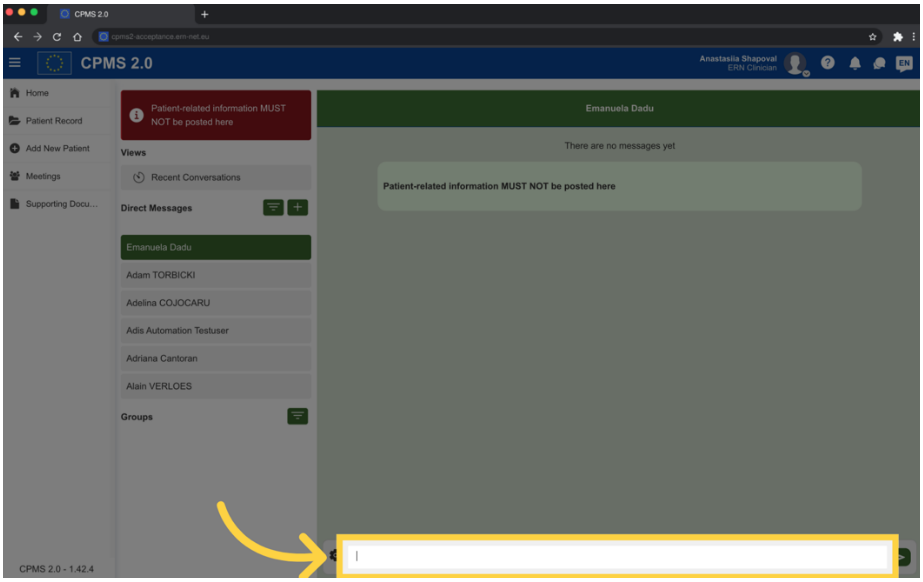
3. How to open a new conversation inside 1:1 Chats?

To open a new conversation inside 1:1 chat, follow these steps:

<table>
<tr>
<td>Step 1</td>
<td>Log in to the CPMS 2.0 system using your credentials.</td>
</tr>
<tr>
<td>Step 2</td>
<td>Click on the “Messages” icon that is in the top menu.


</td>
</tr>
</table>

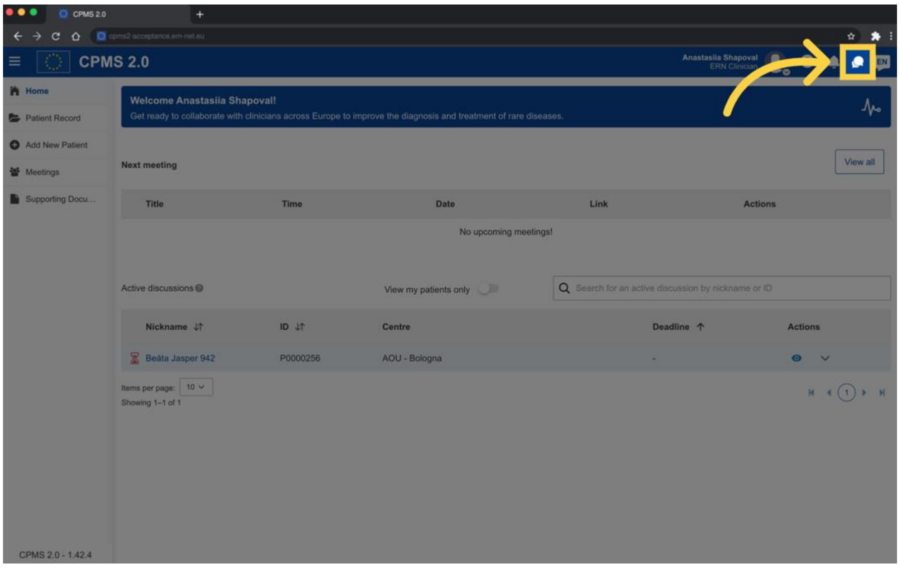
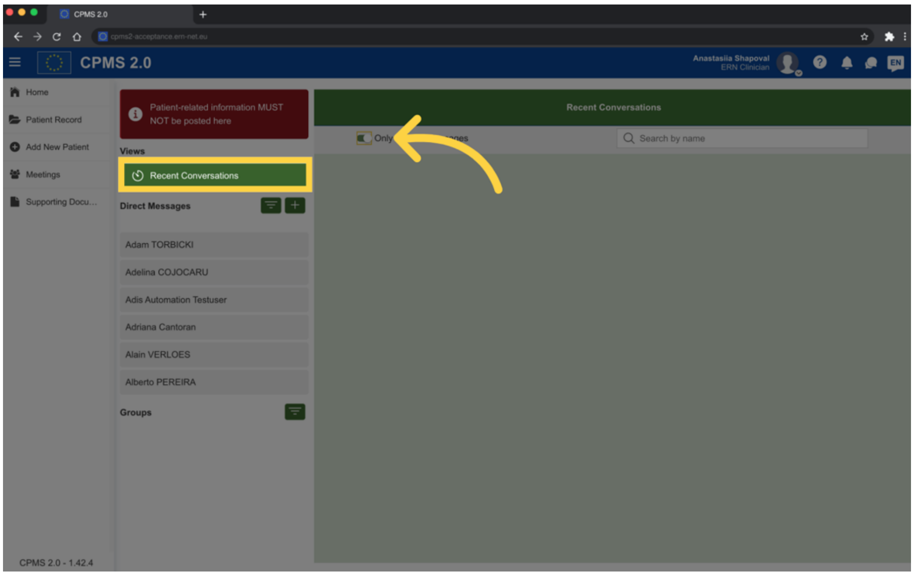
<table>
<tr>
<td>Step 3</td>
<td>Click on the "+" icon to search for a specific person and start a new conversation.

</td>
</tr>
<tr>
<td>Step 4</td>
<td>You can either search by name or choose a specific person from the list above the search bar.

</td>
</tr>
</table>

Step 5	To open a conversation, click on a specific person. 
Step 6	Type your message inside the 1:1 chat. 

4. How to open recent conversations inside 1:1 Chats?

To open recent conversations inside 1:1 chat, follow these steps:

Step 1	Log in to the CPMS 2.0 system using your credentials.

<table>
<tr><td>Step 2</td><td>Click on the “Messages” icon that is located in the top menu.

</td></tr>
<tr><td>Step 3</td><td>Click on the "Recent conversations" button.

</td></tr>
</table>

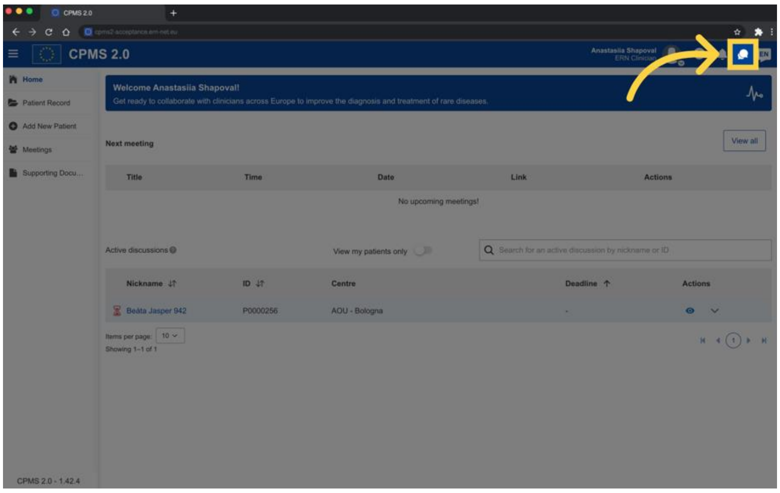
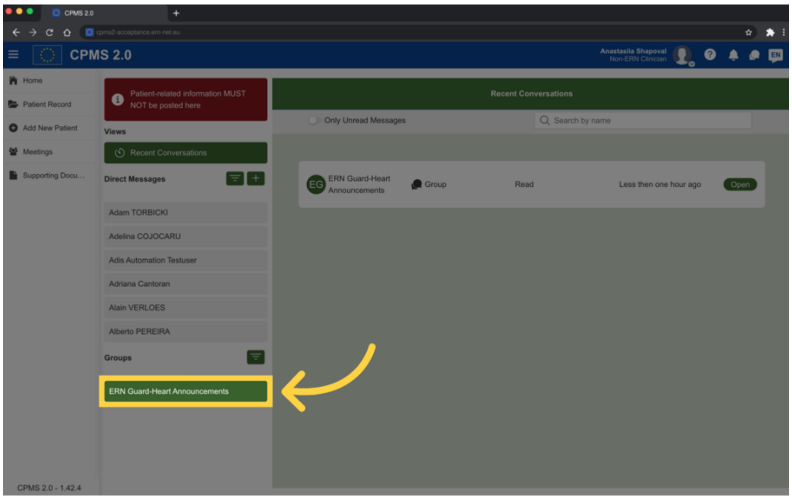
J. Group conversations

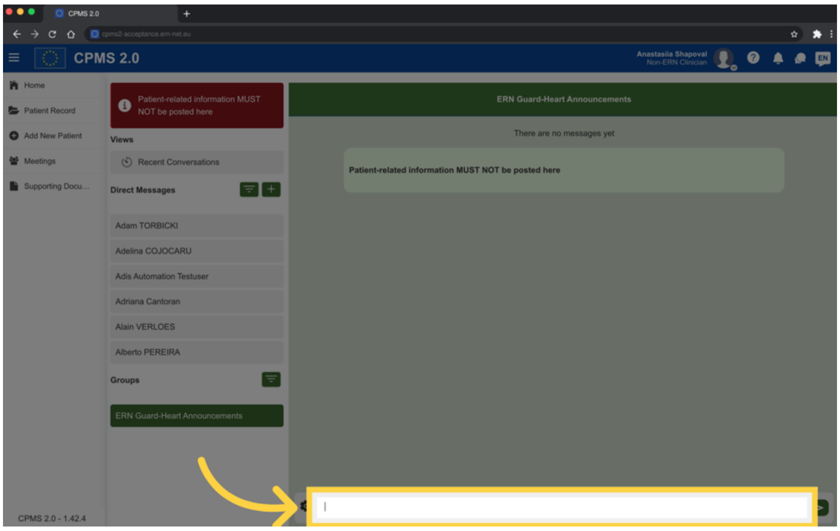
1. Which groups can I chat in?

You will see all CPMS 2.0 groups you are a member of. If you need to create a new group or leave a certain group, please contact your ERN admin.

2. How to open a group conversation inside 1:1 Chats?

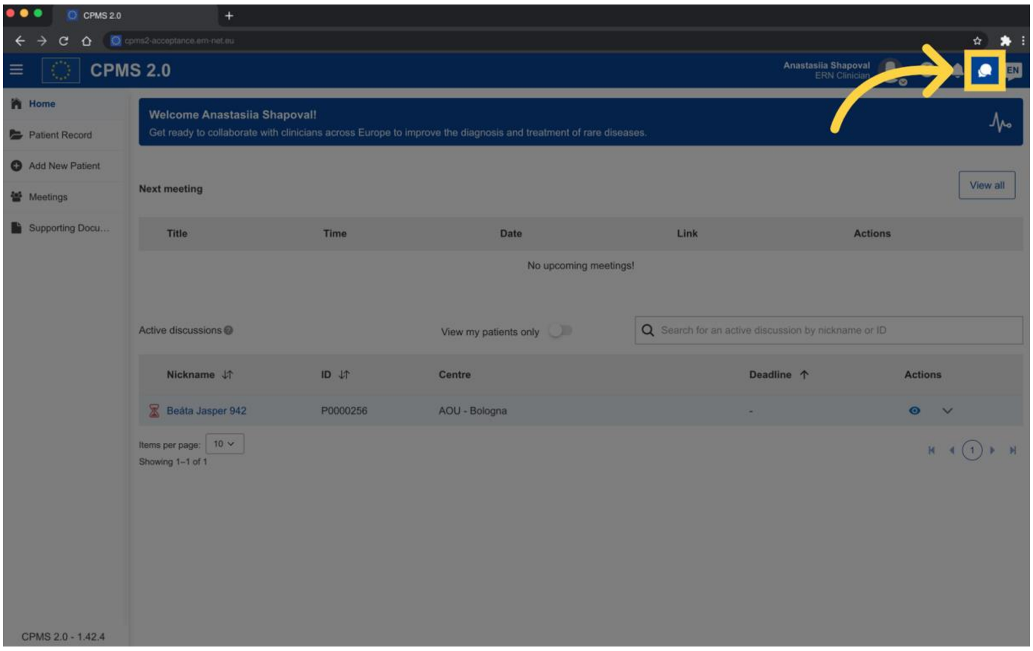
To open a group conversation inside 1:1 chat, follow these steps:

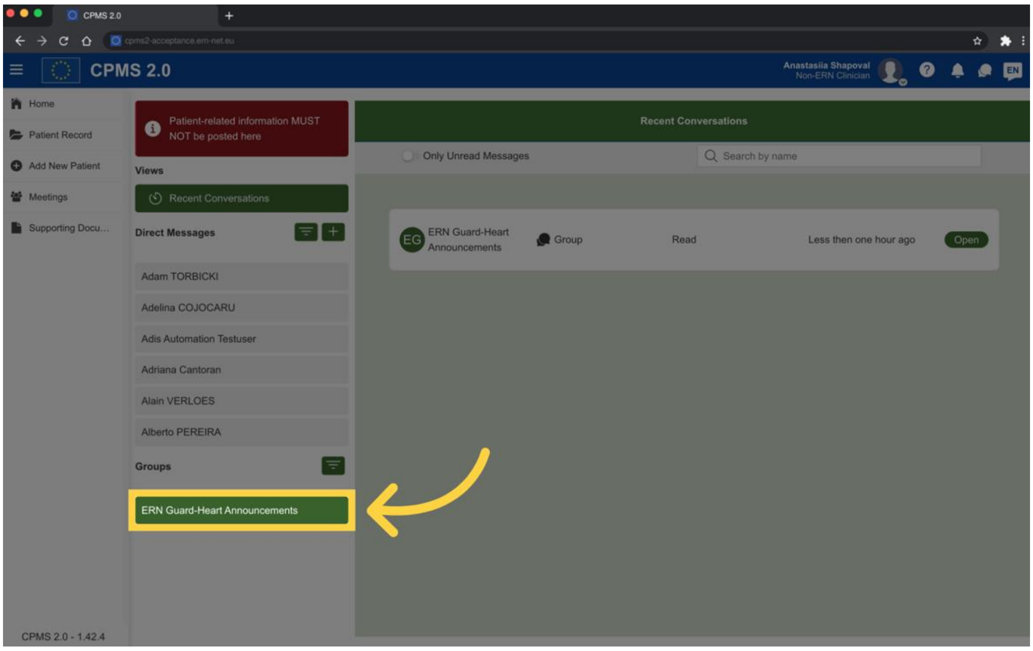
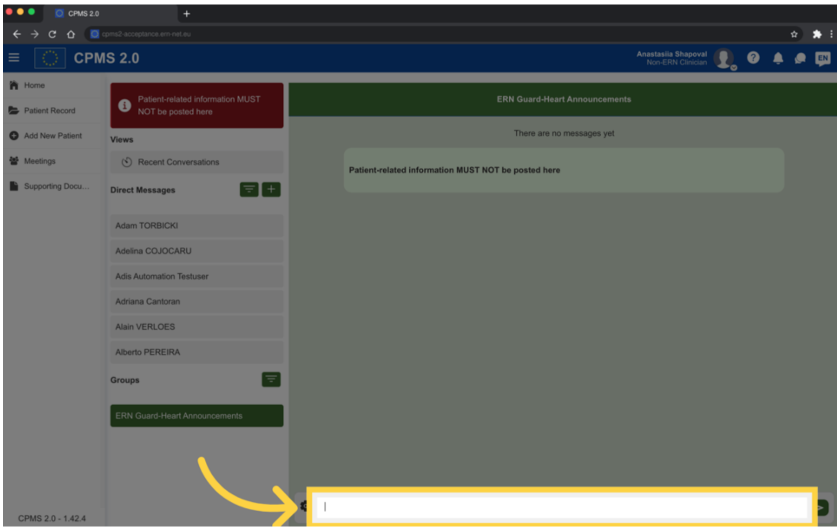
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Click on the “Messages” icon that is located in the top menu. 
Step 3	Select the most recent group from the list, or search for it by pressing on the filter button. 

Step 4	Type your message inside the group 1:1 chat. 

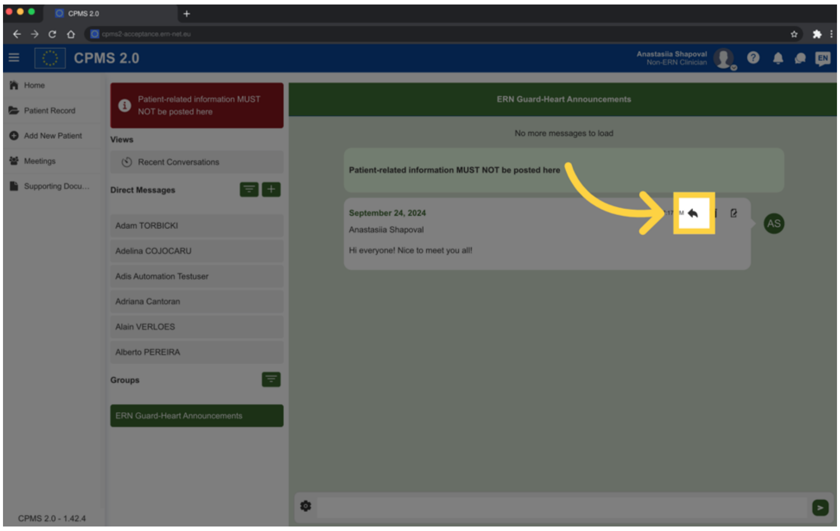
3. How to reply to a message inside the group conversation?

To reply to a message inside the group conversation, follow these steps:

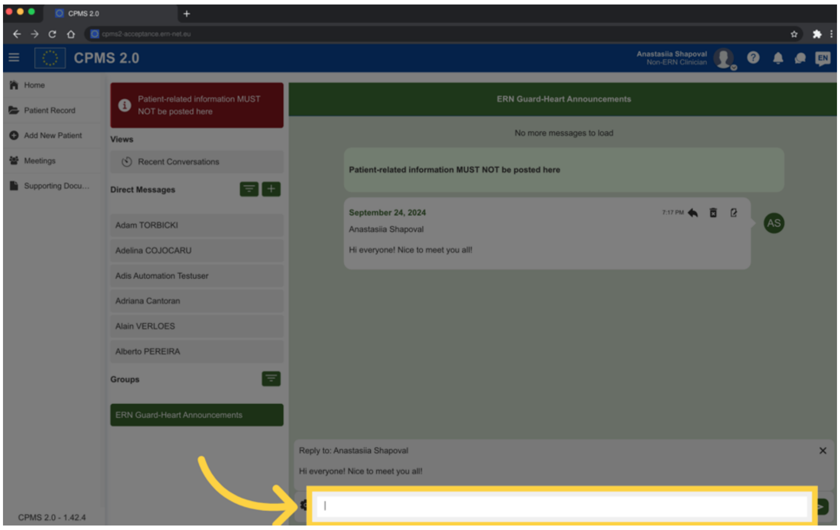
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Click on the “Messages” icon that is located in the top menu. 

Step 3	Select the most recent group from the list, or search for it by pressing on the filter button. 
Step 4	Type your message inside the group 1:1 chat. 

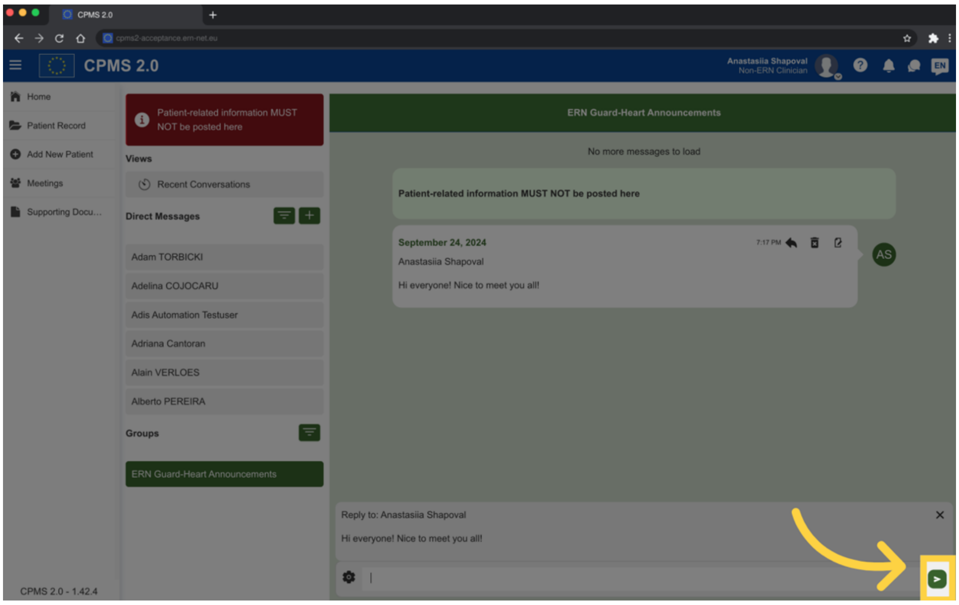
<table>
<tr>
<td>Step 5</td>
<td>Press on the “Reply” icon that is located in the right upper corner.



</td>
</tr>
<tr>
<td>Step 6</td>
<td>Write your reply.

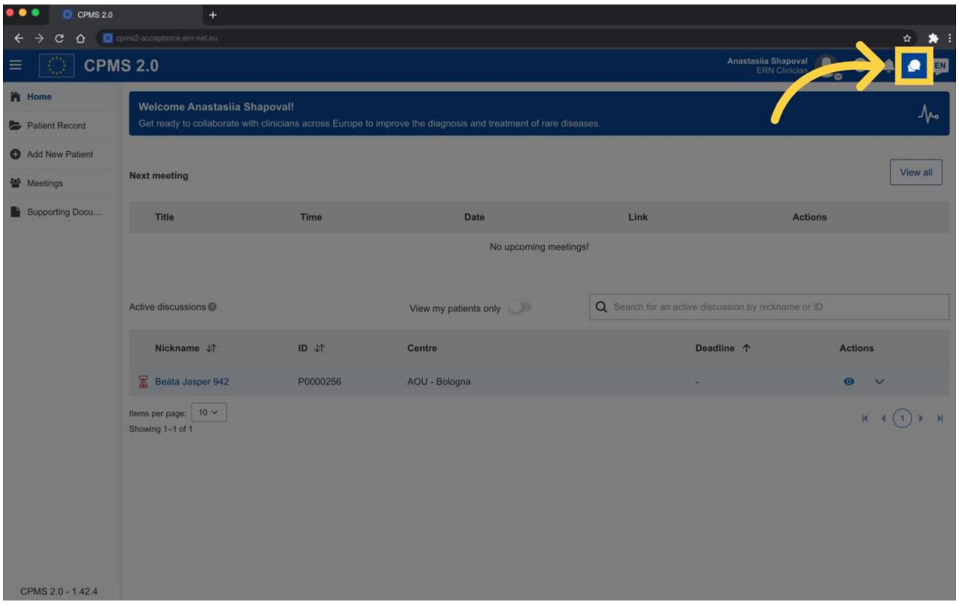


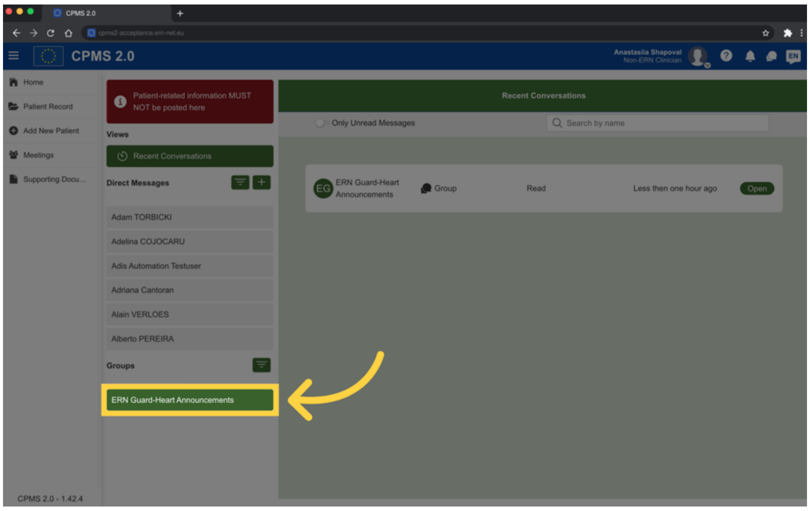
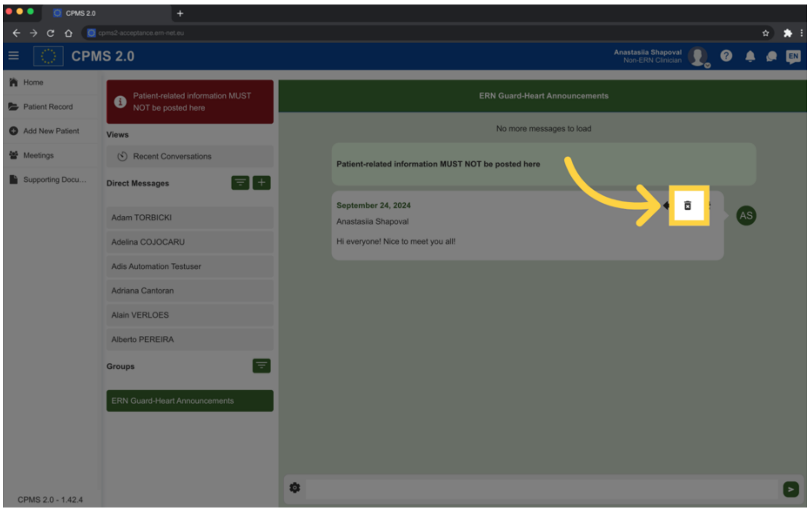
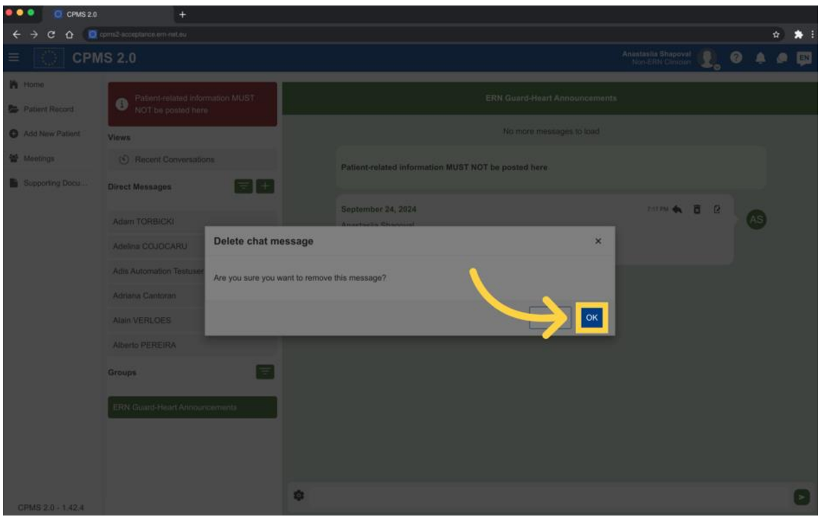
</td>
</tr>
</table>

<table>
<tr><td>Step 7</td><td>Send your message by pressing on the arrow.

</td></tr>
</table>

4. How to delete a message inside the group conversation?

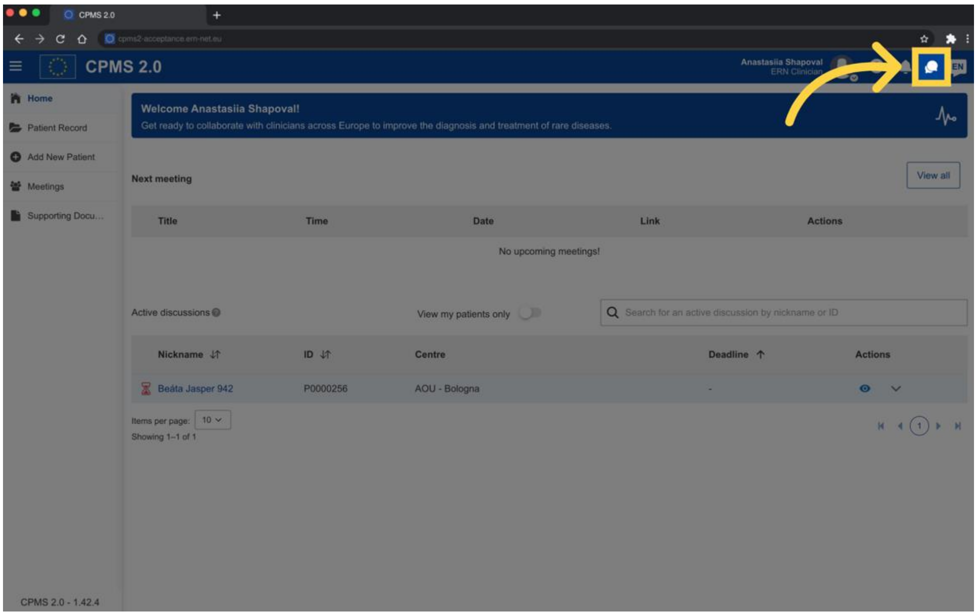
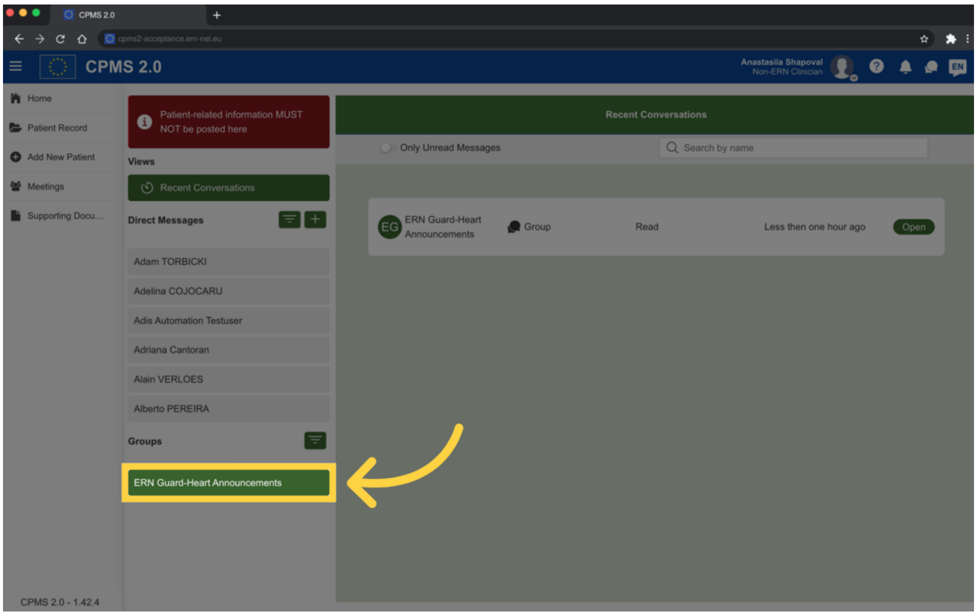
To delete a message inside the group conversation, follow these steps:

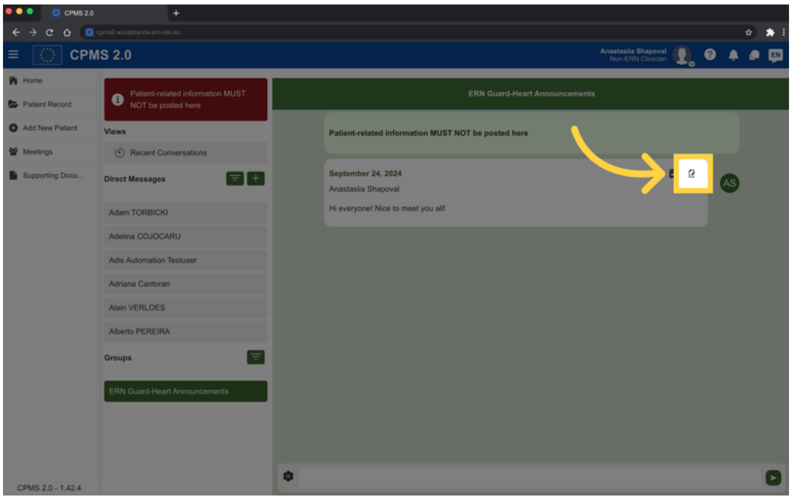
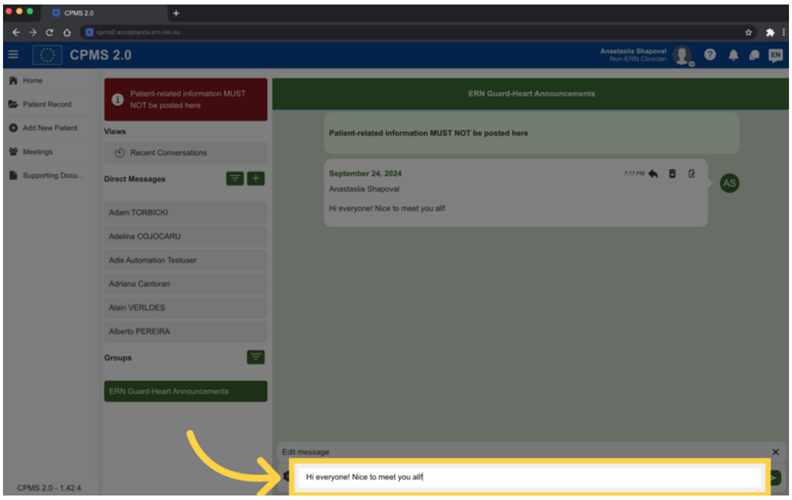
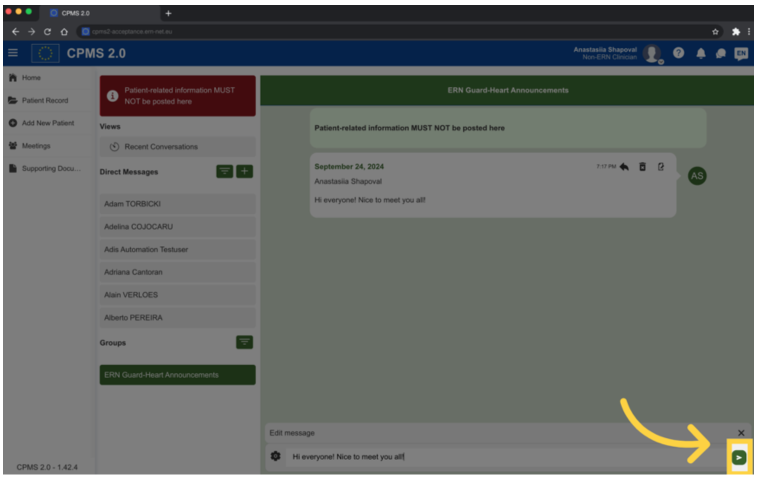
<table>
<tr><td>Step 1</td><td>Log in to the CPMS 2.0 system using your credentials.</td></tr>
<tr><td>Step 2</td><td>Click on the “Messages” icon that is located in the top menu.

</td></tr>
</table>

<table>
<tr>
<td>Step 3</td>
<td>Select the most recent group from the list, or search for it by pressing on the filter button.

</td>
</tr>
<tr>
<td>Step 4</td>
<td>Click on the “Recycle bin” icon that is located in the right upper corner.

</td>
</tr>
<tr>
<td>Step 5</td>
<td>Inside the pop-up click on the “OK” to delete a chat message.

</td>
</tr>
</table>

5. How to edit a message inside the group conversation?

To edit a message inside the group conversation, follow these steps:

<table>
<tr><td>Step 1</td><td>Log in to the CPMS 2.0 system using your credentials.</td></tr>
<tr><td>Step 2</td><td>Click on the “Messages” icon that is located in the top menu.
</td></tr>
<tr><td>Step 3</td><td>Select the most recent group from the list, or search for it by pressing on the filter button.
</td></tr>
</table>

Step 4	Click on the “Edit” icon that is located in the right upper corner. 
Step 5	Modify the text. 
Step 6	Click on the arrow button to send a message. 

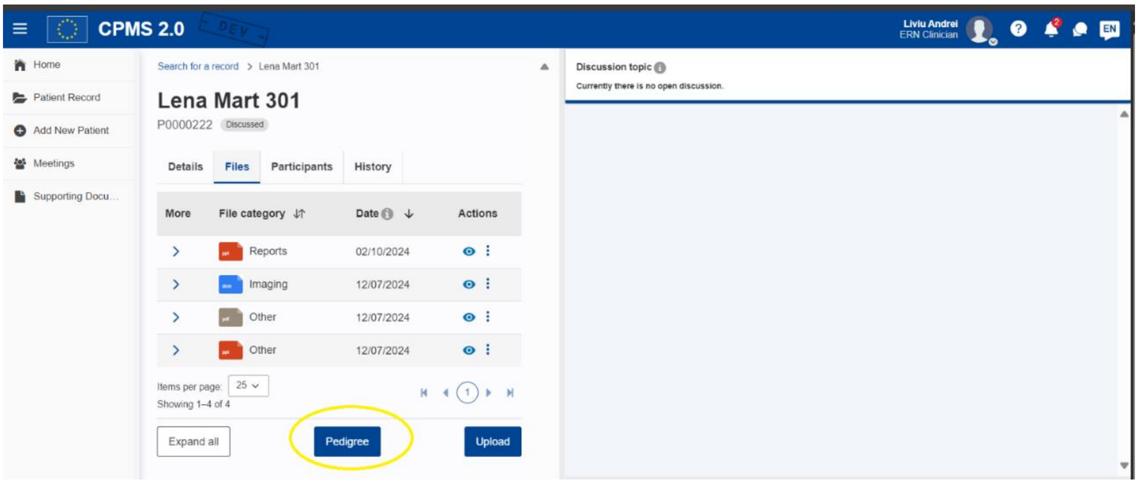
We hope these answers provide clarity on common tasks within CPMS 2.0. If you need further assistance or have additional questions, please contact your ERN Helpdesk for personalized support.

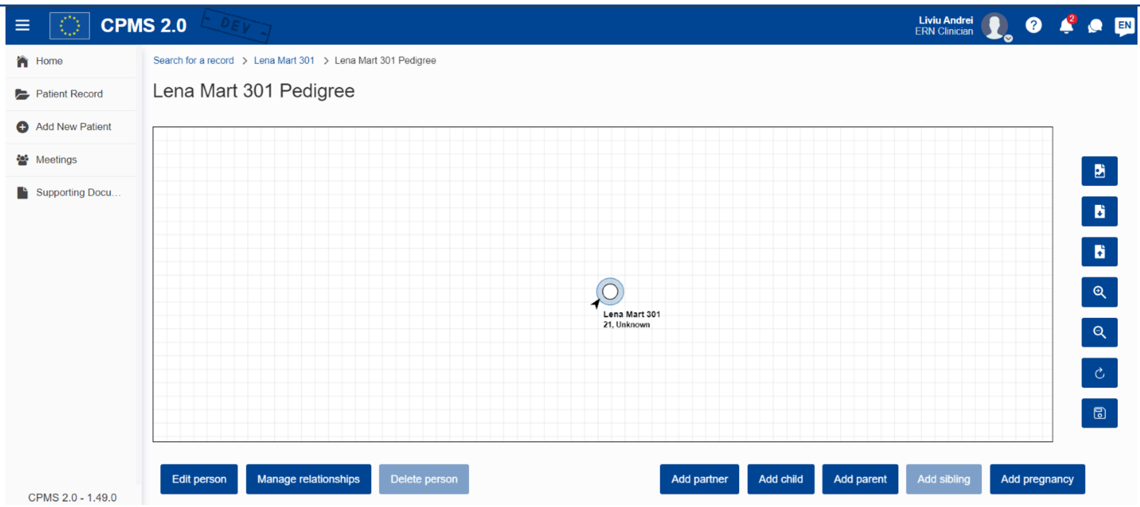
Feel free to also contact the CPMS 2.0 support team.

K. Pedigree Diagram

1. How do I create a Pedigree diagram

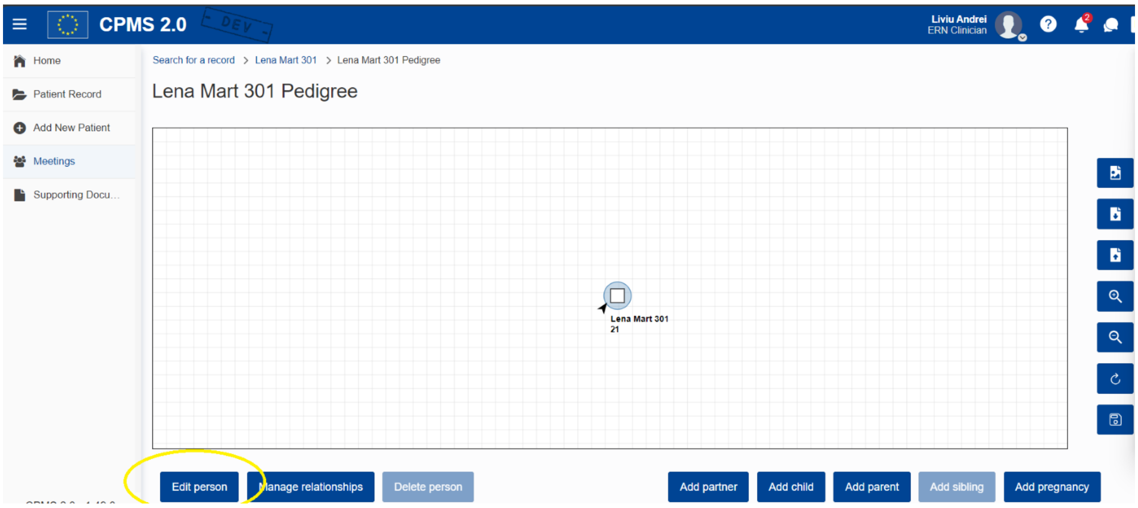
To create a Pedigree Diagram follow these steps:

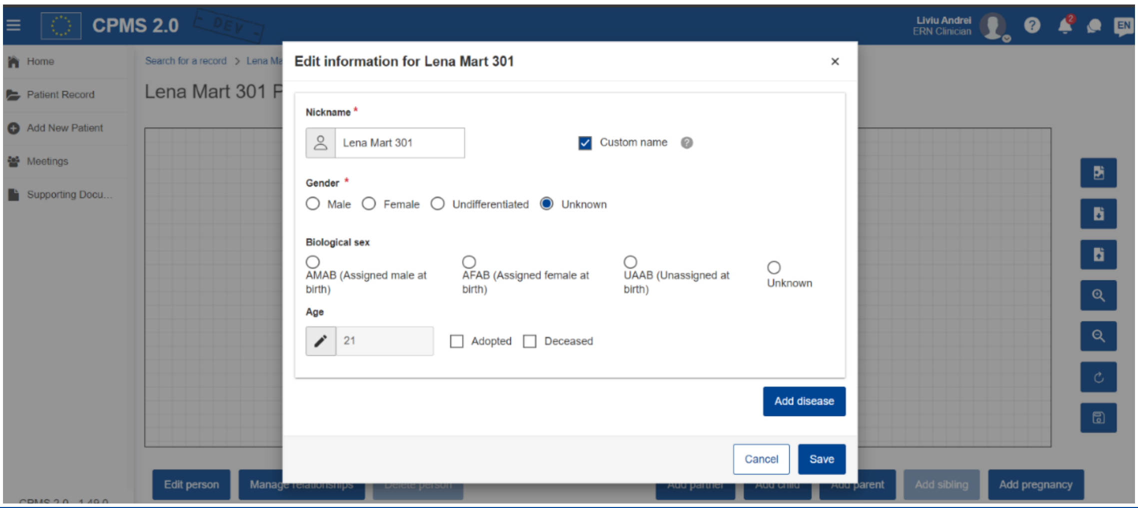
Step 1	Log in to the CPMS 2.0 system using your credentials.
Step 2	Select a patient, navigate to **Files** tab and click on **Pedigree** button 
Step 3	A diagram is opened as follows: 1. The person is displayed in the centre of the screen, with an arrow pointing to it, taking into account the gender: as a square if it is a male, as a round if it is a female, diamond for non-binary/gender diverse 2. The name is displayed below the symbol 3. The age is displayed below the name.

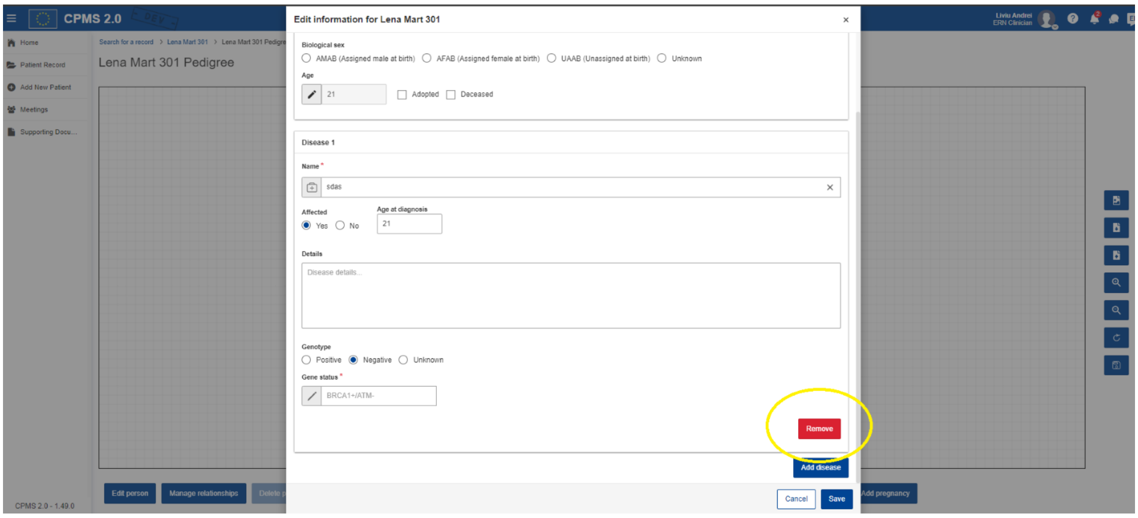
	

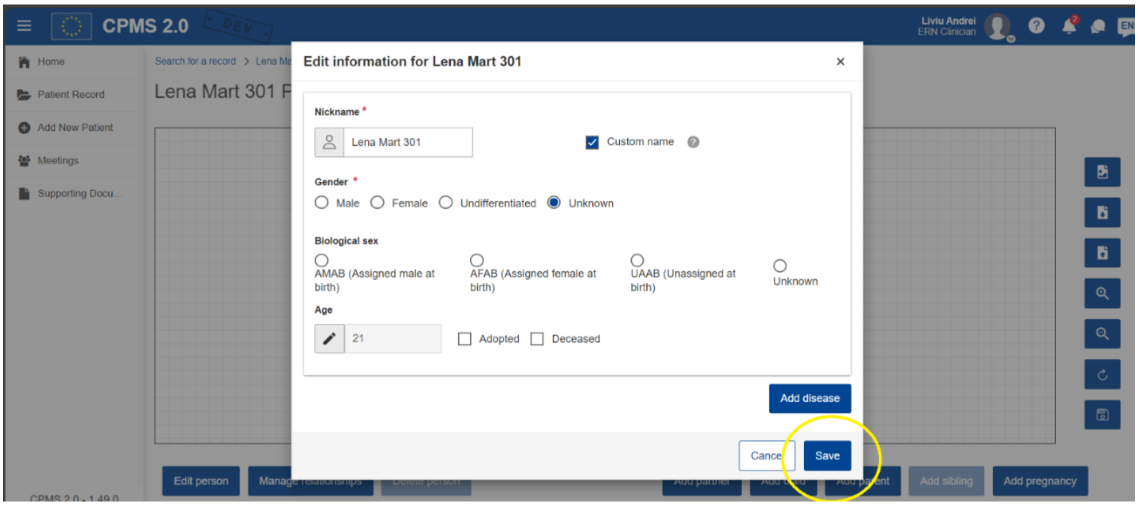
2. How do I edit a person in a Pedigree diagram

To edit a person in a Pedigree Diagram follow these steps:

Step 1	Click on a person from the diagram and click on **Edit** person button. 
Step 2	Fill in the person's details (or update the existing information) based on the rules below: 1. Nickname: the person's nickname is taken from the patient details (for the probant) and is autogenerated for the rest of the persons, using Roman numerals for generations (starting with the older generation at the top and ending with the most recent at the bottom) and Arabic numbers for persons within a generation (starting with the lower value to the left). It can be changed to use a custom value by checking the box "Custom name". Any alpa-numeric character is accepted, no double spaces, no null values.

	2. Gender: the person's gender is taken from the patient details (for the probant). It can be changed to any value defined in gender ListOfValues and is mandatory. 3. Biological sex (Optional): the person's biological sex can be set (not mandatory) by selecting one of the values: AMAB- Assigned Male At Birth, AFAB- Assigned Female At Birth, UAAB- Unassigned At Birth, or Unknown. 4. Age: for the probant, the person's age is taken from the patient details and cannot be changed unless the patient is deceased in which case the age at death should be filled in and considered. For the other persons in a diagram, the age is mandatory at the time of person creation but can be changed at any time and is automatically recomputed during time (by increasing the saved age with difference in years between the today date and the lastsaved date of the pedigree diagram. 5. Adopted: if the person was adopted, the information can be stored by checking the Adopted checkbox. 6. Deceased: if the person is deceased, the information can be stored by checking the Deceased checkbox. In this case, the age field will store the Age at death and will not be recalculated during time. 
Step 3	For each person in a diagram, several diseases can be added, by clicking on the **Add disease** button. Clicking this button triggers the display of a new section within the form.
Step 4	Type in the details for the disease based on the rules below: 1. Name: select from the list or type in a name for the disease 2. Affected indicator: select yes or no depending if the person is affected or not by the disease 3. If affected is checked, type in the age at diagnosis (default value is the age of the person). This field is not mandatory.

<table>
<tr><td></td><td>
4. <u>Details</u>: fill in any relevant information about the patient with regards to the selected disease. This information is displayed only when editing a patient (is not visible in the diagram directly)
5. <u>Genotype</u>: select positive, negative, or unknown value depending on genotype status. If the selection is positive or negative, a mandatory field is displayed and must be filled in with the gene status.
</td></tr>
<tr><td>Step 5</td><td>Additional diseases can be added to a person by clicking the Add disease button:</td></tr>
<tr><td>Step 6</td><td>Diseases can be removed from a patient by clicking the Remove button:


</td></tr>
<tr><td>Step 7</td><td>Save the information for the person by clicking the Save button.


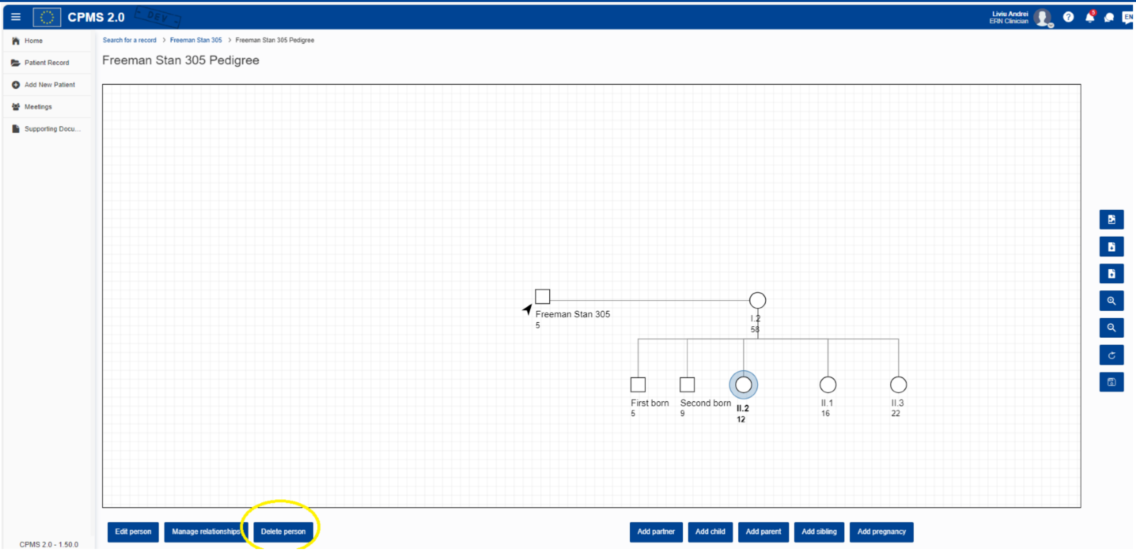
The following updates are done in the diagram:</td></tr>
</table>

	1. The person is displayed taking into account the gender: as a square if it is a male, as a round if it is a female, diamond for non-binary/gender diverse 2. The name is displayed below the symbol 3. The age is displayed below the name and if the Biological sex is set, it is also displayed in the line with the age, right after the age. 4. The symbol is filled in if the user is affected by at least a disease, with one colour per disease (the symbol can be split in 2,3,4 different quadrants based on need). If the disease was already assigned to a particular colour, the same coluor will be applied in the entire diagram for all persons having the respective disease (same disease means same Phenotypic Abnormality (HPO) code or same freetext in OtherDisease field). 5. Up to 4 diseases can be shown graphically for a patient. For the other selected diseases the user must view person's profile via Edit person menu. 6. The symbol is crossed by a oblique line if the patient is deceased 7. The symbol is surrounded by external brackets if the patient is adopted. 8. The name of the disease must be displayed underneath the patient and the age when it was diagnosed (one disease/line) 9. The genotype and whether it is positive or negative is displayed above the patient in the left upper corner with a grey font colour.

3. How do I delete a person from a Pedigree diagram

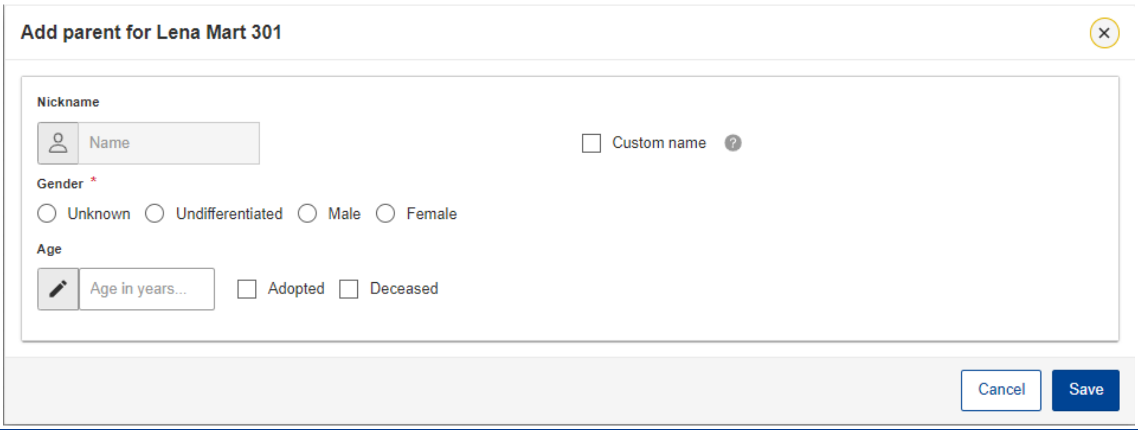
To delete a person from a Pedigree Diagram follow these steps:

Step 1	Click on a person from the diagram and click on **Delete person** button.

	 Note that the probant cannot be deleted (the Delete Person button is grayed out)
Step 2	Once the **Delete person** button is pressed a confirmation popup is displayed. If the user clicks on yes, the person is deleted. If the user clicks on no, there is no action done. Note that deleting a person may leave persons without any connection to the probant. A verification is done when saving the diagram and the user is requested to clean the diagram so that all persons have direct/indirect connections to the probant.

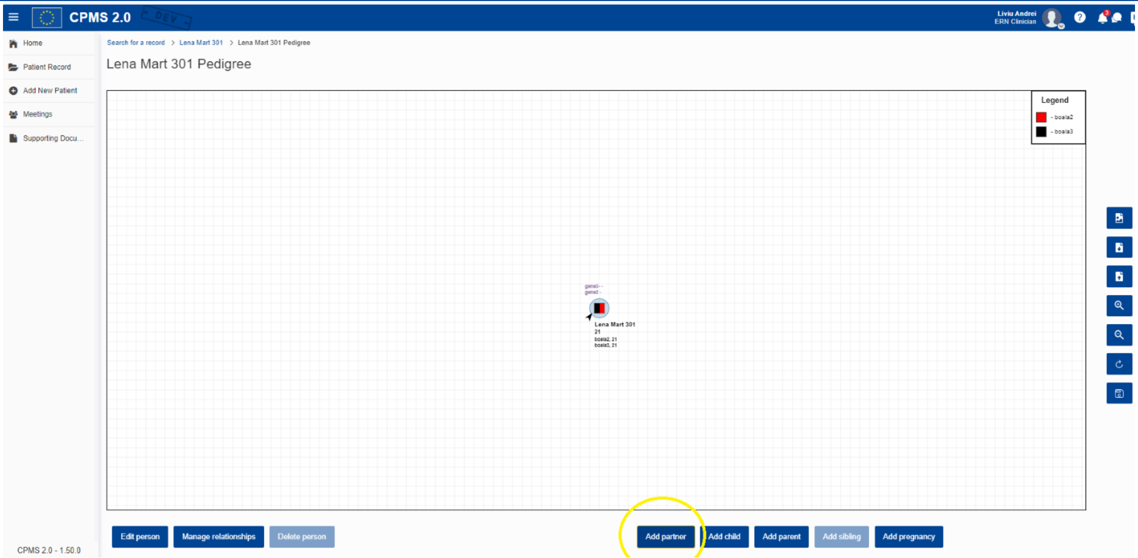
4. How do I add a parent to an existing person

Step 1	Click on a person from the diagram and click on **Add parent** button.
Step 2	Fill in the person's details based on the rules below: 1. Nickname: the person's nickname is autogenerated using Roman numerals for generations (starting with the older generation at the top and ending with the most recent at the bottom) and Arabic numbers for persons within a generation (starting with the lower value to the left). It can be changed to use a custom value by checking the box "Custom name". Any alpa-numeric character is accepted, no double spaces, no null values. 2. Gender: the selection of one of the displayed values is mandatory. 3. Age: the field is not mandatory, but if set, it is automatically recomputed during time (by increasing the saved age with difference in years between the today date and the lastsaved date of the pedigree diagram).

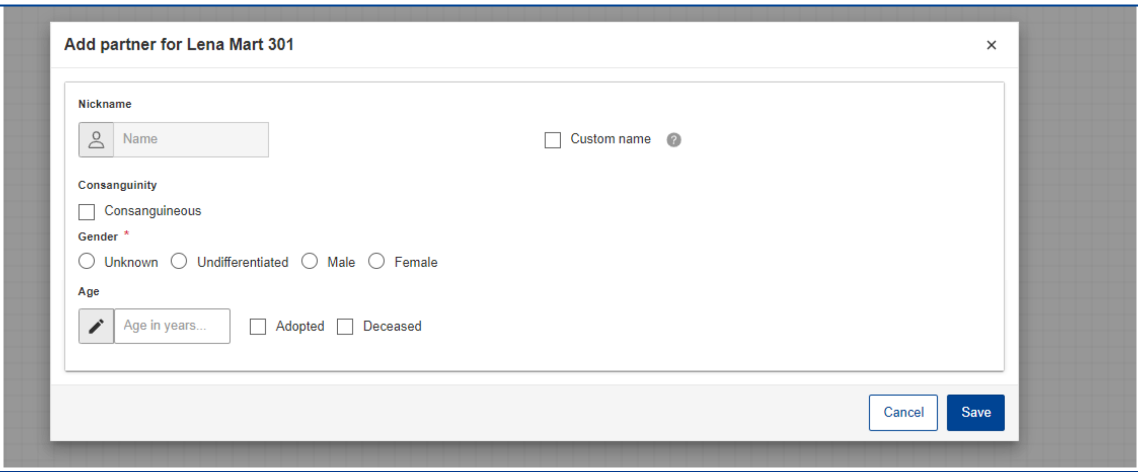
	4. Adopted: if the person was adopted, the information can be stored by checking the Adopted checkbox. 5. Deceased: if the person is deceased, the information can be stored by checking the Deceased checkbox. In this case, the age field will store the Age at death and will not be recalculated during time. 
Step 3	Save the information for the parent by clicking the **Save** button. The following updates are done in the diagram: 1. The parent is displayed taking into account the gender: as a square if it is a male, as a round if it is a female, diamond for non-binary/gender diverse. 2. There is a vertical line that links the person with the added parent. In case there already was another parent, a relationship between them is created and displayed as a horizontal line. 3. The name is displayed below the symbol. 4. The age is displayed below the name.
Step 4	For adding other details for the parent (such as diseases), click on the person and on the **Edit person** button.

5. How do I add a partner to an existing person

Step 1	Click on a person from the diagram and click on **Add partner** button.

<table>
<tr><td></td><td>
</td></tr>
<tr><td>Step 2</td><td>Fill in the person’s details based on the rules below:

<u>Nickname</u>: the person’s nickname is autogenerated using Roman numerals for generations (starting with the older generation at the top and ending with the most recent at the bottom) and Arabic numbers for persons within a generation (starting with the lower value to the left). It can be changed to use a custom value by checking the box “Custom name”. Any alpa-numeric character is accepted, no double spaces, no null values.
<u>Consanguinity</u> : if the partner is consanguineous with the person he is added in a relationship with, the box must be checked. The relationship will be drawn as a double line.
<u>Gender</u>: the selection of one of the displayed values is mandatory.
<u>Age</u>: the field is not mandatory, but if set, it is automatically recomputed during time (by increasing the saved age with difference in years between the today date and the lastsaved date of the pedigree diagram).
<u>Adopted</u>: if the person was adopted, the information can be stored by checking the Adopted checkbox.
<u>Deceased</u>: if the person is deceased, the information can be stored by checking the Deceased checkbox. In this case, the age field will store the Age at death and will not be recalculated during time.
</td></tr>
</table>

<table>
<tr><td></td><td>
</td></tr>
<tr><td>Step 3</td><td>Save the information for the partner by clicking the Save button.

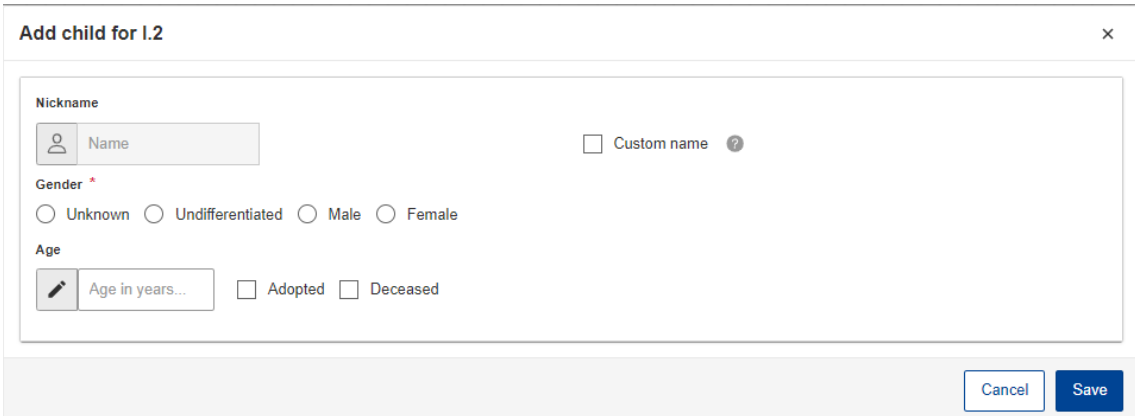
The following updates are done in the diagram:

The partner is displayed taking into account the gender: as a square if it is a male, as a round if it is a female, diamond for non-binary/gender diverse.
There is a horizontal line that links the 2 partners (double line in case the relationship is consanguineous).
The name is displayed below the symbol.
The age is displayed below the name .
</td></tr>
<tr><td>Step 4</td><td>For adding other details for the partner (such as diseases), click on the person and on the Edit person button.</td></tr>
</table>

6. How do I add a child to an existing person

<table>
<tr><td>Step 1</td><td>Click on a person from the diagram and click on Add child button.</td></tr>
<tr><td>Step 2</td><td>Fill in the person’s details based on the rules below:

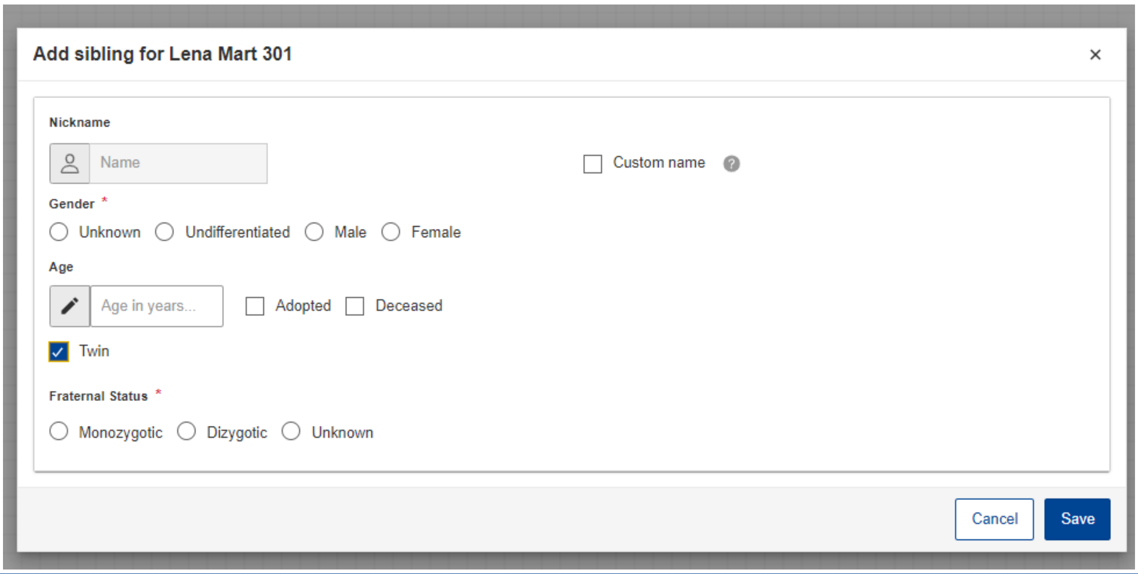
<u>Nickname</u>: the person’s nickname is autogenerated using Roman numerals for generations (starting with the older generation at the top and ending with the most recent at the bottom) and Arabic numbers for persons within a generation (starting with the lower value to the left). It can be changed to use a custom value by checking the box “Custom name”. Any alpa-numeric character is accepted, no double spaces, no null values.
<u>Gender</u>: the selection of one of the displayed values is mandatory.
<u>Age</u>: the field is not mandatory, but if set, it is automatically recomputed during time (by increasing the saved age with difference in years
</td></tr>
</table>

<table>
<tr><td></td><td>between the today date and the last saved date of the pedigree diagram).
4. <u>Adopted</u>: if the person was adopted, the information can be stored by checking the Adopted checkbox.
5. <u>Deceased</u>: if the person is deceased, the information can be stored by checking the Deceased checkbox. In this case, the age field will store the Age at death and will not be recalculated during time.

</td></tr>
<tr><td>Step 3</td><td>Save the information for the child by clicking the Save button.

The following updates are done in the diagram:
1. The child is displayed taking into account the gender: as a square if it is a male, as a round if it is a female, diamond for non-binary/gender diverse.
2. There is a vertical line that links the parent to the child.
3. The name is displayed below the symbol.
4. The age is displayed below the name .</td></tr>
<tr><td>Step 4</td><td>For adding other details for the child (such as diseases), click on the person and on the Edit person button.</td></tr>
</table>

7. How do I add a sibling to an existing person

	<u>IMPORTANT: you can only add siblings to a person if the person has at least one parent</u>
Step 1	Click on a person from the diagram and click on **Add Sibling** button.
Step 2	Fill in the person's details based on the rules below: 1. <u>Nickname</u>: the person's nickname is autogenerated using Roman numerals for generations (starting with the older generation at the top and ending with the most recent at the bottom) and Arabic numbers for

	persons within a generation (starting with the lower value to the left). It can be changed to use a custom value by checking the box “Custom name”. Any alpa-numeric character is accepted, no double spaces, no null values. 2. Gender: the selection of one of the displayed values is mandatory. 3. Age: the field is mandatory at the time of sibling creation and is automatically recomputed during time (by increasing the saved age with difference in years between the today date and the last saved date of the pedigree diagram). 4. Adopted: if the person was adopted, the information can be stored by checking the Adopted checkbox. 5. Deceased: if the person is deceased, the information can be stored by checking the Deceased checkbox. In this case, the age field will store the Age at death and will not be recalculated during time. 6. Twin: check the box if the sibling you are adding is the twin of the person. 7. Fraternal status: if the twin box is checked, the fraternal status of the twin must be set by choosing one of the available options. 
Step 3	Save the information for the sibling by clicking the **Save** button. The following updates are done in the diagram: 1. The sibling is displayed taking into account the gender: as a square if it is a male, as a round if it is a female, diamond for non-binary/gender diverse. 2. The sibling is positioned on the same vertical axis as the person to whom he is added. 3. If the sibling is not a twin, there is a horizontal line that is created below the parent(s) of the 2 siblings.

	4. If the sibling is a twin, the 2 twins are linked with oblique lines (with a horizontal line between them if they are monozygotic) 5. The name is displayed below the symbol. 6. The age is displayed below the name .
Step 4	For adding other details for the sibling (such as diseases), click on the person and on the **Edit person** button.

8. How do I add a pregnancy to an existing person

Step 1	Click on a person from the diagram and click on **Add Pregnancy** button.
Step 2	Fill in the pregnancy's details based on the rules below: 1. <u>Gender</u>: the selection of one of the displayed values is mandatory. 2. <u>Estimated Delivery Date</u>: pick up from the calendar the estimated delivery date, in case it is known. 3. <u>Terminated</u>: if the pregnancy is terminated, the information can be stored by checking the Terminated checkbox. In this case, 2 new fields are displayed. 4. <u>Reason for termination</u>: the selection of one of the displayed values is possible but not mandatory. 5. <u>Age at termination</u>: the age (in weeks) at termination can be set. The field is not mandatory.
Step 3	Save the information for the pregnancy by clicking the **Save** button. The following updates are done in the diagram: 1. The pregnancy is displayed as a triangle with a P in it. 2. If the estimated delivery date is set, the EDD + the date is displayed below the symbol. 3. If the pregnancy is terminated, if the fields reason for termination and age at termination are set, their value is displayed.

9. How do I manage relationships of a particular person

Step 1	If you want to manage the relationships of a person with the other persons defined in the diagram, click on a person from the diagram and click on **Manage relationship** button. A form is displayed to manage relationships of the selected person.

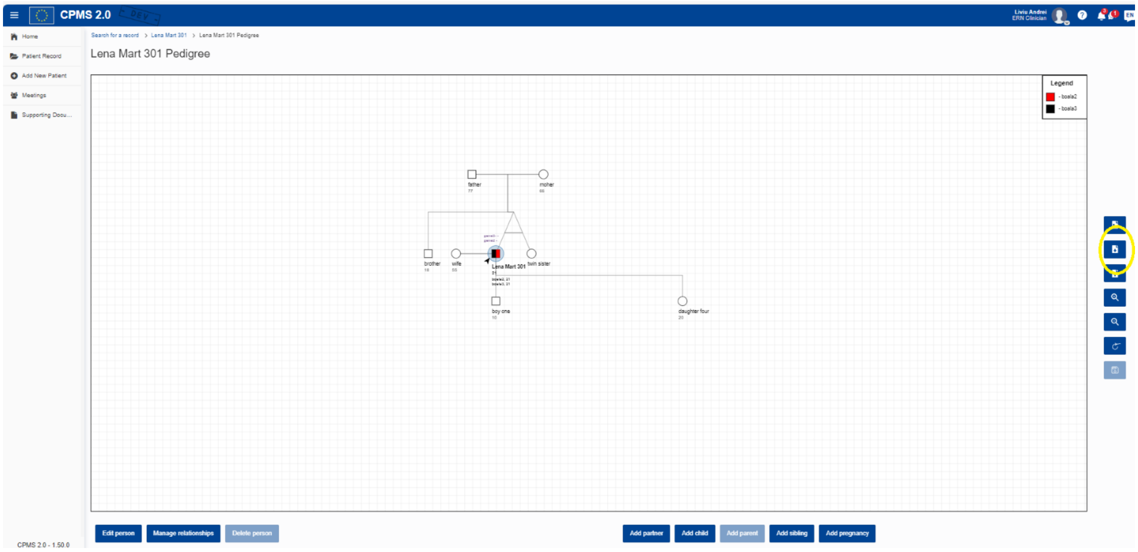
Step 2	In the <u>Edit partners</u> section, you can edit the person's partnership relationships by:
	4. Changing an existing partner relationship to consanguineous/non-consanguineous.
	5. Removing one of the existing partner relationships by clinking the **Remove** button from the respective line
	6. Adding a new partner relationship with a person from the diagram by clicking the **Add partner** button.
	    a. In the dropdown that is displayed, select the person from the diagram with whom you want to add a partner relationship. You can choose from all persons in the diagram (that are not yet in a partner relationship with the selected person).
	    b. Set the consanguinity attribute for this partner relationship
	    c. Click on **Add partner** button in case you want to add a new partner relationship.
	You can edit the other sections before saving all you work or you can click the **Save** button after each section (which will close the form and in case you want to edit other relationships you need to press the **Manage relationship** button once more).

Step 3	In the <u>Edit children</u> section, you can edit the person's children relationships by:
	7. Removing a person from the list of your children by clinking the **Remove** button from the respective line. This will not delete the person, it will only remove the line between the deleted child and the person you are managing the relationships
	8. Adding a person from the diagram as the child of the person you are modifying, by clicking the **Add child** button.
	    a. In the dropdown that is displayed, select the person from the diagram you want to add as a child. You can choose from all persons in the diagram, except for the person's parents, other children, other persons with 2 parents.
	    b. Click on **Add child** button in case you want to add a new child.
	
	You can edit the other sections before saving all you work or you can click the **Save** button after each section (which will close the form and in case you want to edit other relationships you need to press the **Manage relationship** button once more).

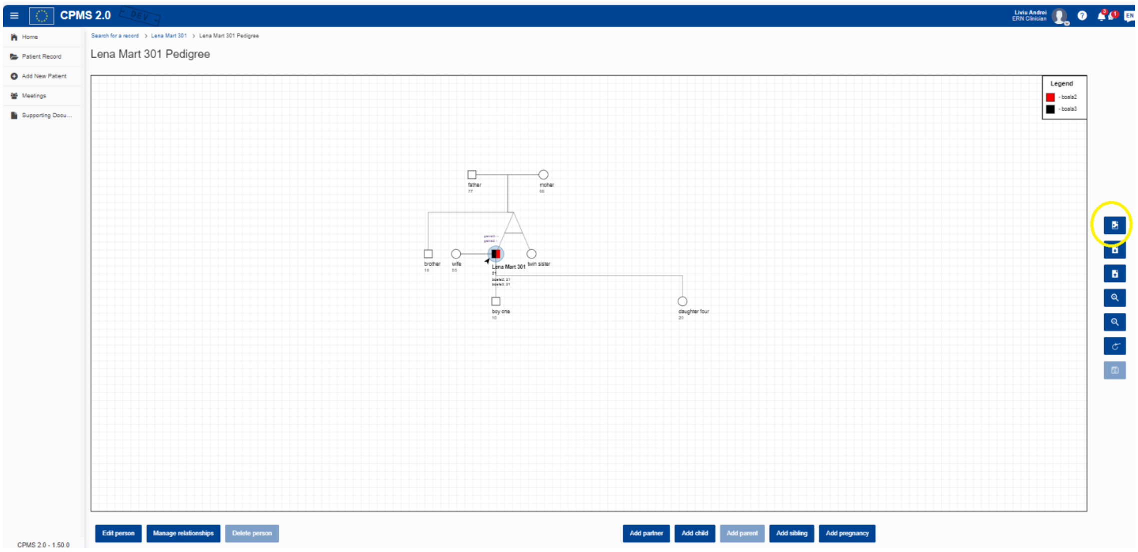
Step 4	In the <u>Edit parents</u> section, you can edit the person's parents relationships by: 6. Removing a person from the list of your parents by clinking the **Remove** button from the respective line. This will not delete the person, it will only remove the line between the deleted parent and the person you are managing the relationships

	7. Adding a person from the diagram as the parent of the person you are modifying, by clicking the **Add parent** button. This is only applicable in case there are not already 2 parents defined. a. In the dropdown that is displayed, select the person from the diagram you want to add as a parent. You can choose from all persons in the diagram, except for the already defined parent and the person's children. b. Click on **Add parent** button in case you want to add a new parent (only valid until the limit of 2 parents/person is reached). You can edit the other sections before saving all you work or you can click the **Save** button after each section (which will close the form and in case you want to edit other relationships you need to press the **Manage relationship** button once more).
Step 5	In the Edit twins section, you can edit the person's twin relationships by: 1. Changing the type of twins for the existing ones (between monozygotic, dizygotic and unknown). 2. Removing a person from the list of your twins by clinking the **Remove** button from the respective line. This will not delete the person, it will only transform that person into a sibling. 3. Adding a person from the diagram as the twin of the person you are modifying, by clicking the **Add twin** button. This is only applicable in case there are siblings defined for that person. a. In the dropdown that is displayed, select the person from the diagram you want to add as a twin. You can choose from all siblings of the person that are not yet defined as twins for this person. b. For each twin relationship, you can setup if the twin is monozygotic, dizygotic or unknown. c. Click on **Add twin** button in case you want to add a new parent (only valid until the person has siblings that are not his twins). You can edit the other sections before saving all you work or you can click the **Save** button after each section (which will close the form and in case you want to edit other relationships you need to press the **Manage relationship** button once more).

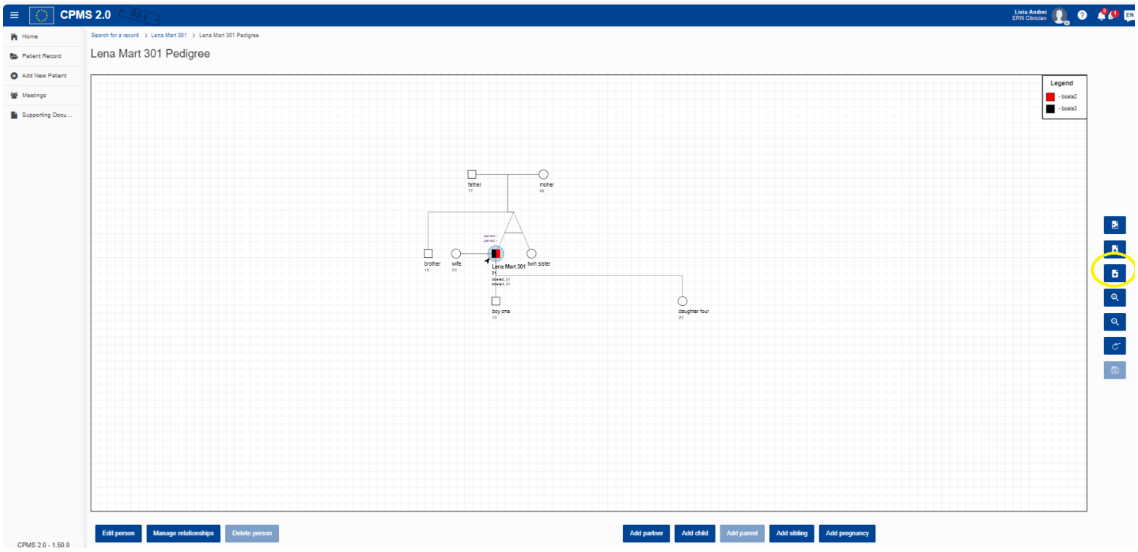
10. Generate a json file so that it can be imported in another tool

Step 1	If you need the diagram to be imported in another tool, you may find useful the json files that describe the entire structure. To obtain this, click on the **export json** icon on the right side of the screen (2nd icon). 
Step 2	The json file is exported and available in you predefined download folder.

11. Generate an image so that it can be printed/shared

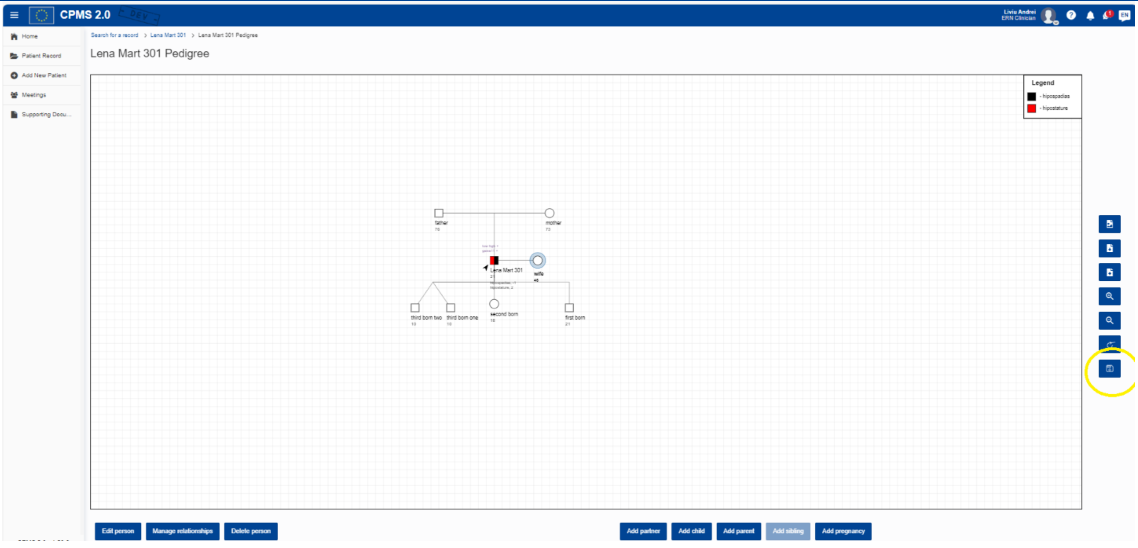
Step 1	If you need the diagram to be printed or discussed in a non virtual meetings, you may you may find useful the download in an image format. To obtain this, click on the **export image** icon on the right side of the screen (1st icon). 
Step 2	The json file is exported and available in you predefined download folder.

12. Import a diagram from a valid json

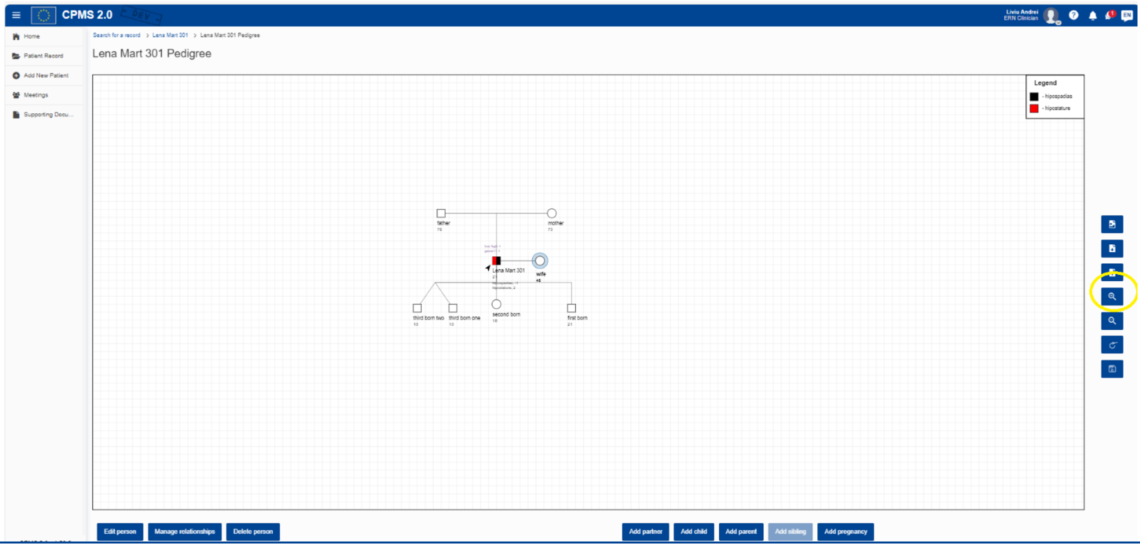
Step 1	If you need to import a diagram created in a different tool, you can do this by clicking on the **upload diagram** icon on the right side of the screen (3rd icon). The action will replace the existing diagram with the imported one.  Please note that the diagram must respect the CPMS Pedigree rules, otherwise the following message is displayed and the previous diagram is not discarded: ”The uploaded file does not meet CPMS 2.0 Pedigree requirements. No upload is performed”. The rules that the json file must meet are available here: [Pedigree JSON Structure.]
Step 2	The json file is exported and available in you predefined download folder.

13. Save work done

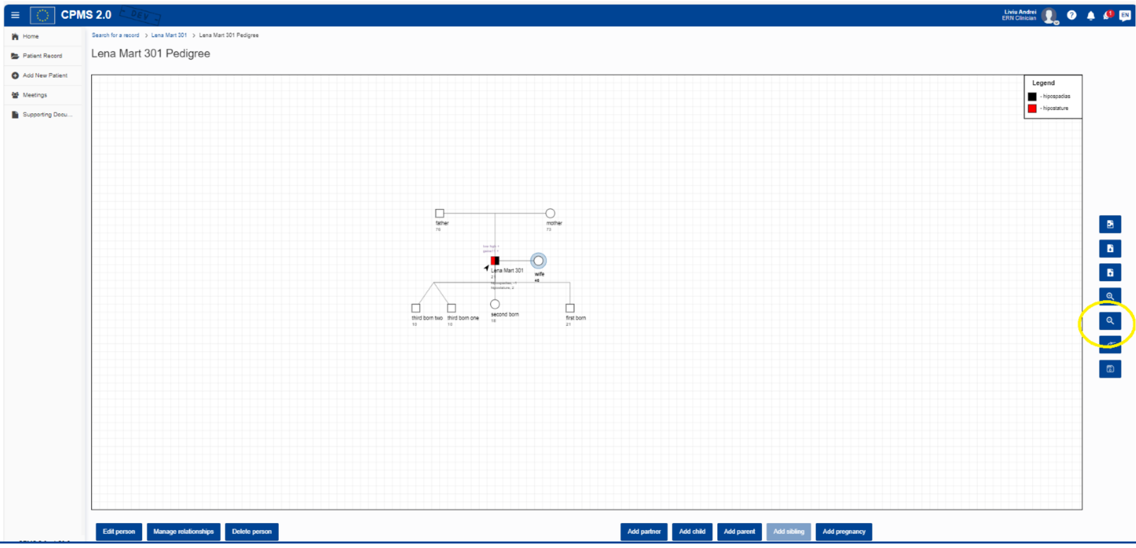
Step 1	At any time you want to save you work, click on the **save** icon on the right side of the screen (7th icon).

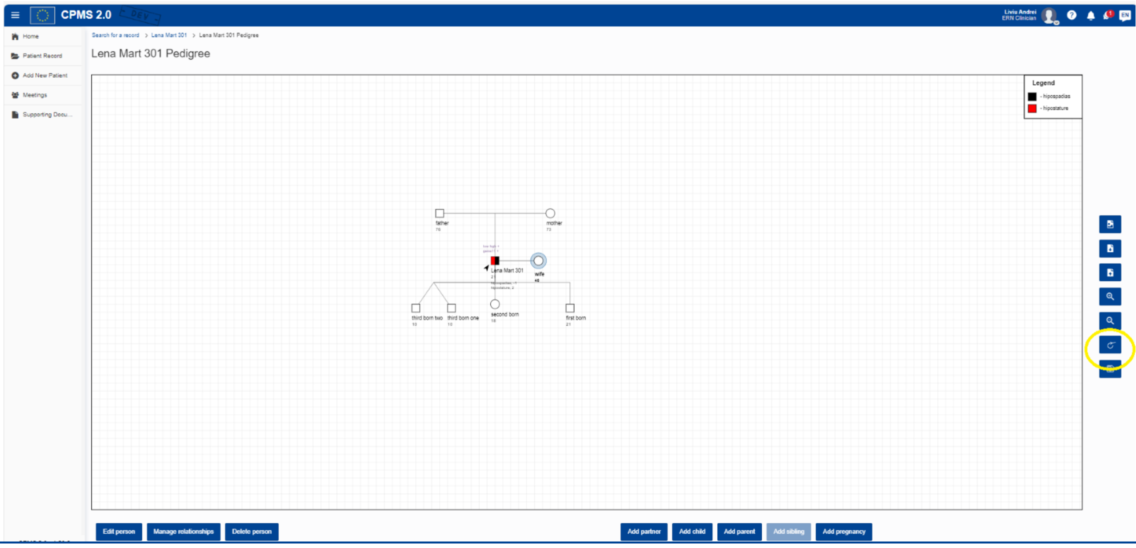
14. Increase/reduce the visibility over the diagram

Step 1	If you want to have a clearer view on the diagram, you can zoom in by clicking the **Zoom in** icon on the right side of the screen (4th icon). 

<table>
<tr>
<td>Step 2</td>
<td>If you want to have a general view on the diagram, you can zoom out by clicking the Zoom out icon on the right side of the screen (5th icon).



</td>
</tr>
<tr>
<td>Step 3</td>
<td>If you want to revert to the initial settings (with the probant in the center of the screen), you can revert to original zoom by clicking the revert zoom icon on the right side of the screen (6th icon).

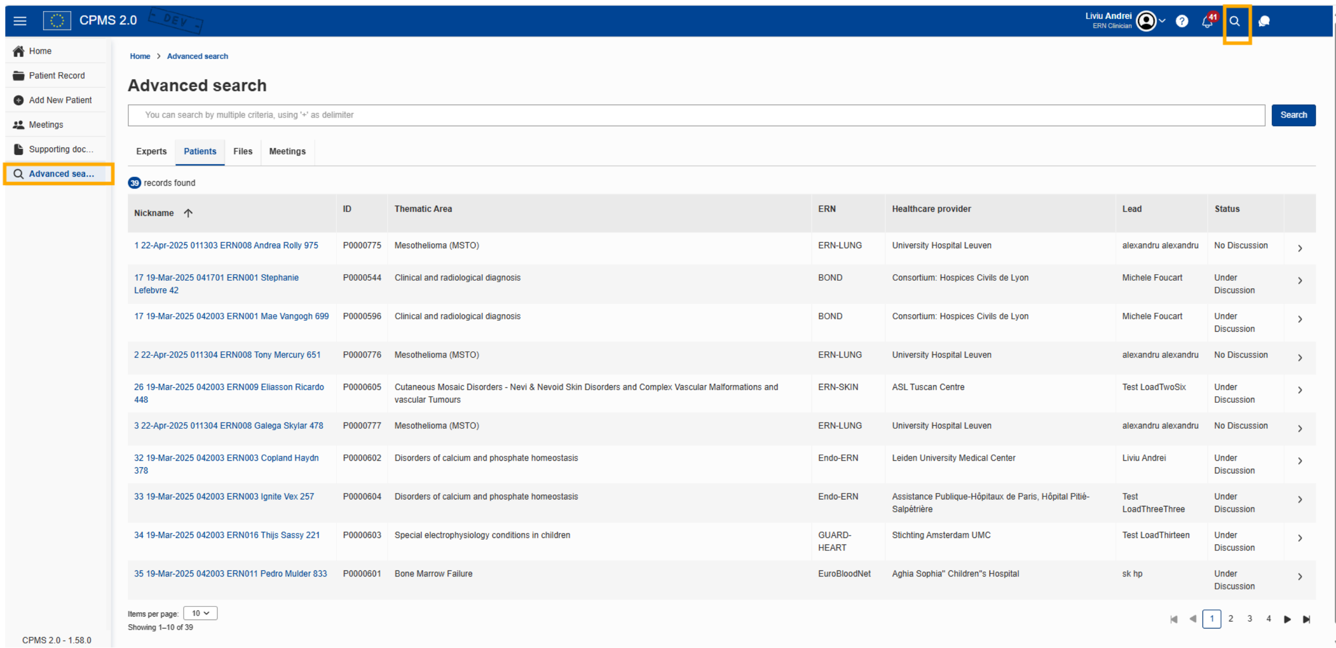


</td>
</tr>
</table>

L. Advanced search

1. What is Advanced search?

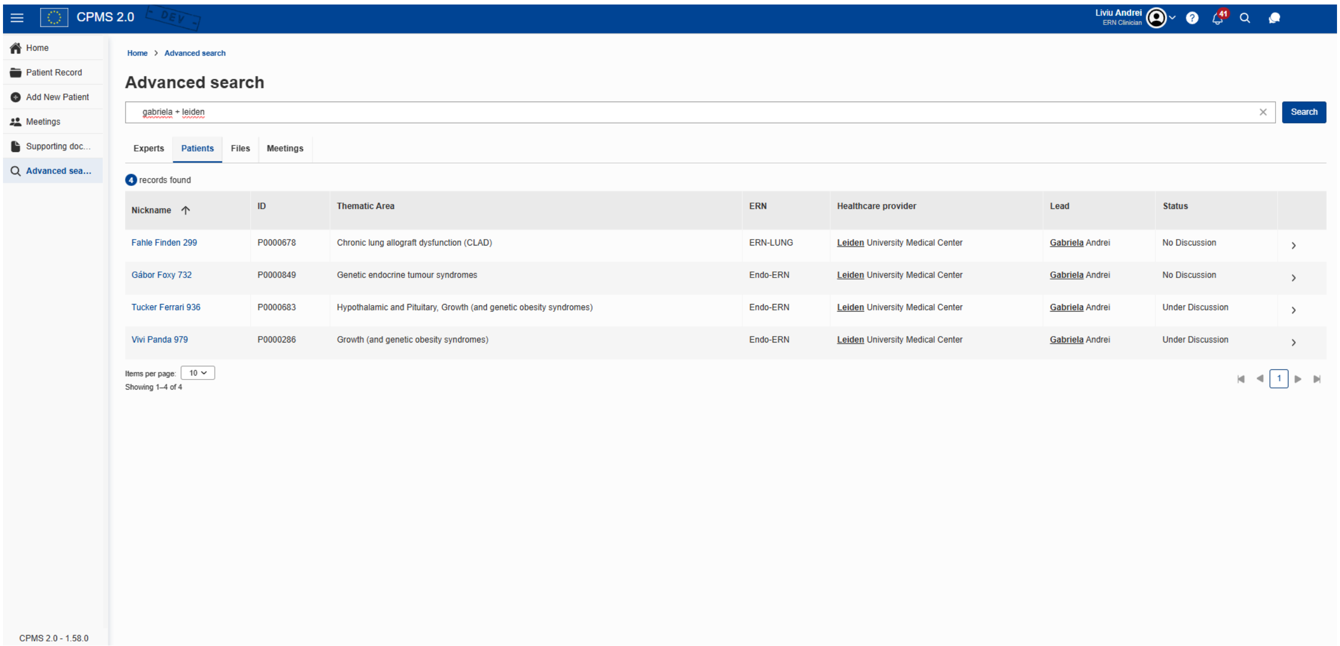
In the CPMS 2.0 left Menu you can see one option that is called Advanced search marked by a magnifier icon. There you can perform an advanced global application search that returns results from several places in the CPMS 2.0 application like Experts, Patients, Files and Meetings sections.



The Advanced search offers you the information you are looking for that is filtered based on your selected search criteria.

2. How can I do an Advanced search?

You can conduct research that involves either a single criterion (e.g. a single word) or multiple ones. If you are searching using multiple criteria, you need to add '+' as a separator between the chosen criteria. For example, when you search for a doctor, you can search by the name of the doctor and the name of the hospital he is working at (e.g. Gabriela + Leiden) In order to view the results of the search you need to press the Enter key or click on the Search button displayed on the right side of the searchable area.



The results of the search are displayed in four tabs: Experts, Patients, Files, Meetings. You can expand the results you are interested in, and you will be able to see their details. In all results, the field in which the information was found is displayed in bold characters, so you can easily see what is relevant for you.

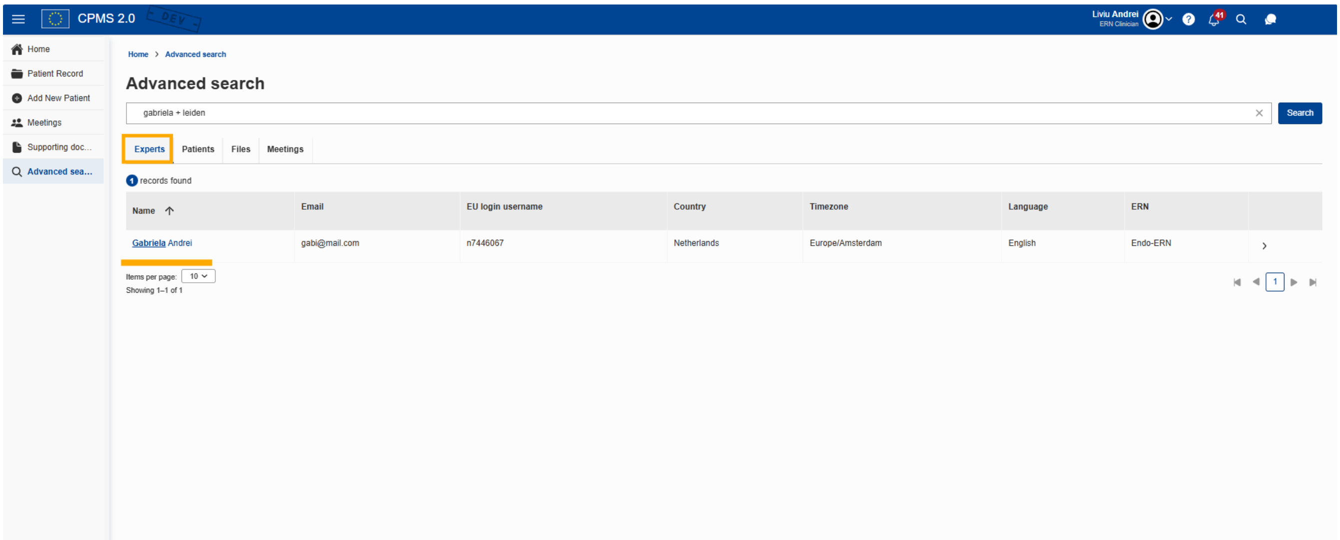
You should be aware that the search is not case sensitive. Also, the search will not be done in fields containing personal information like Name, Date of birth or Nationality, unless your role allows you to access that kind of information.

3. How can I use the results displayed in the Experts tab?

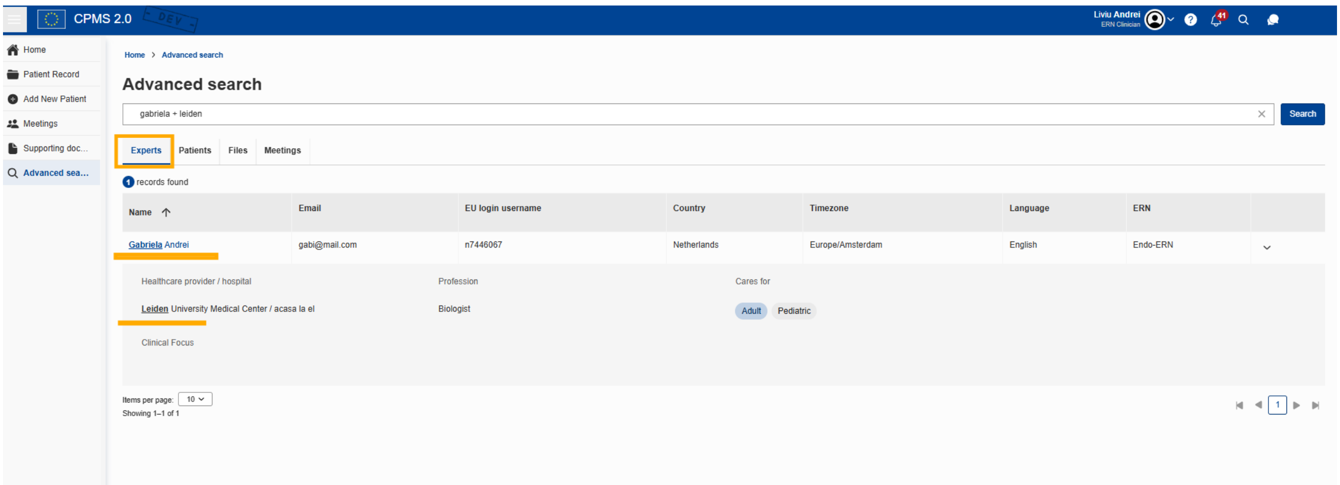
Performing a search will display in the Experts tab the CPMS 2.0 doctors and their stand-ins that match the search criteria. The information regarding users is searched in multiple places of the application to bring you the most relevant information:

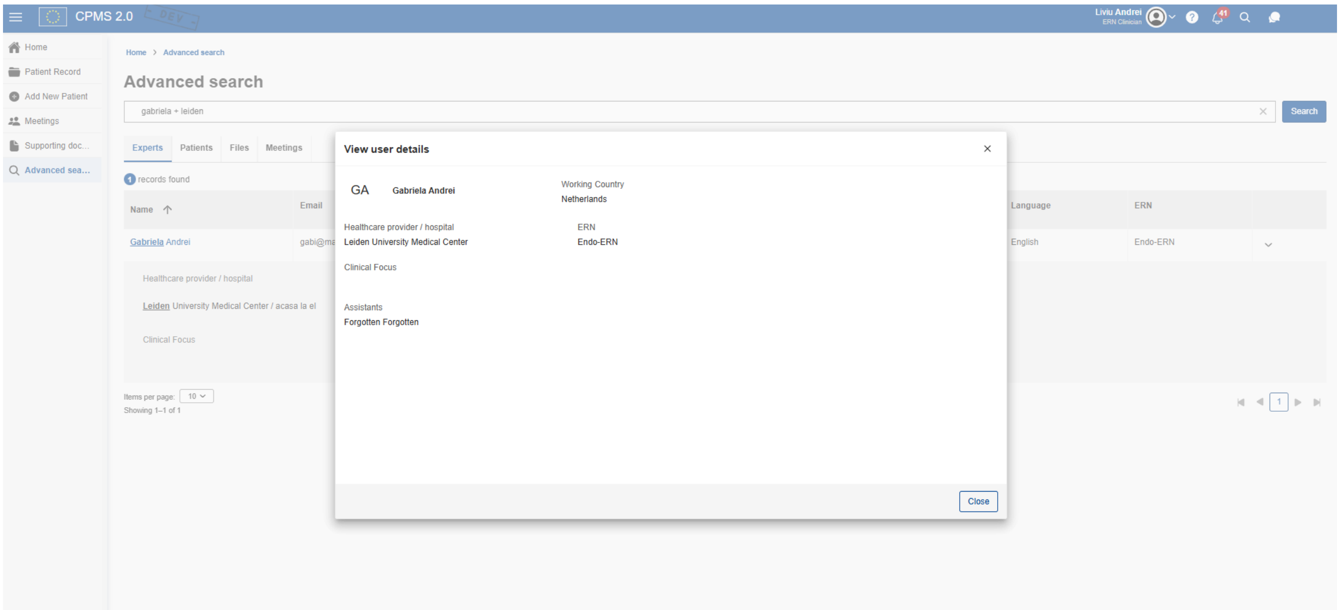
- My account - Personal Information
  - First name
  - Last name
  - Email (both secondary and primary)
  - EU login username
- My account - Professional Information
  - ERN

- Healthcare Provider/Hospital
- Role
- Profession
- Working Country
- Cares for
- Thematic area
- Sub-thematic area
- Clinical focus



You can expand the details of the returned results to see more details or you can simply click on the name of the expert, and you will see a card containing all the information about the selected expert.



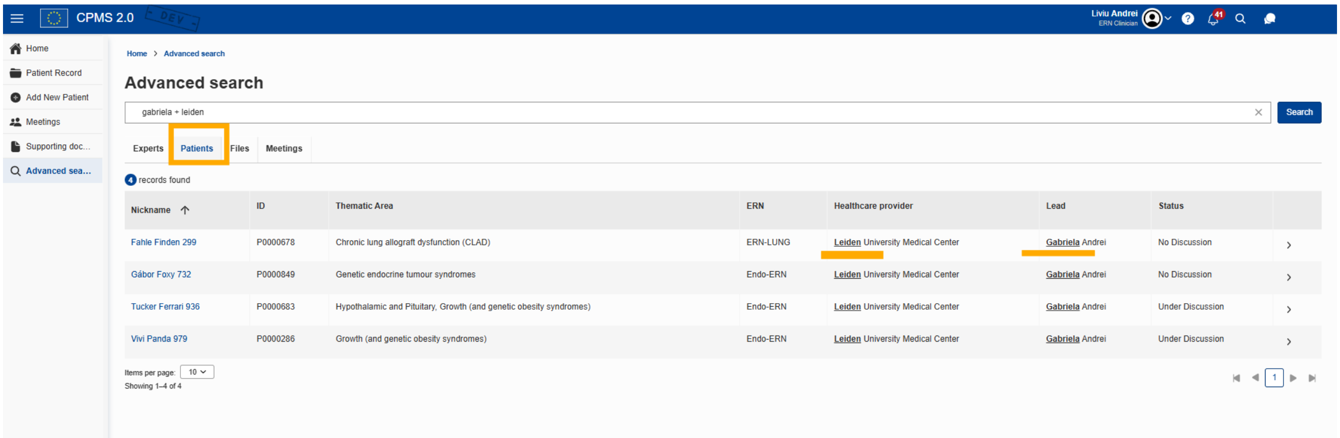


Example of search you can perform: Last name + Country + ERN + Profession (ex: John + France + Endo +Biologist)

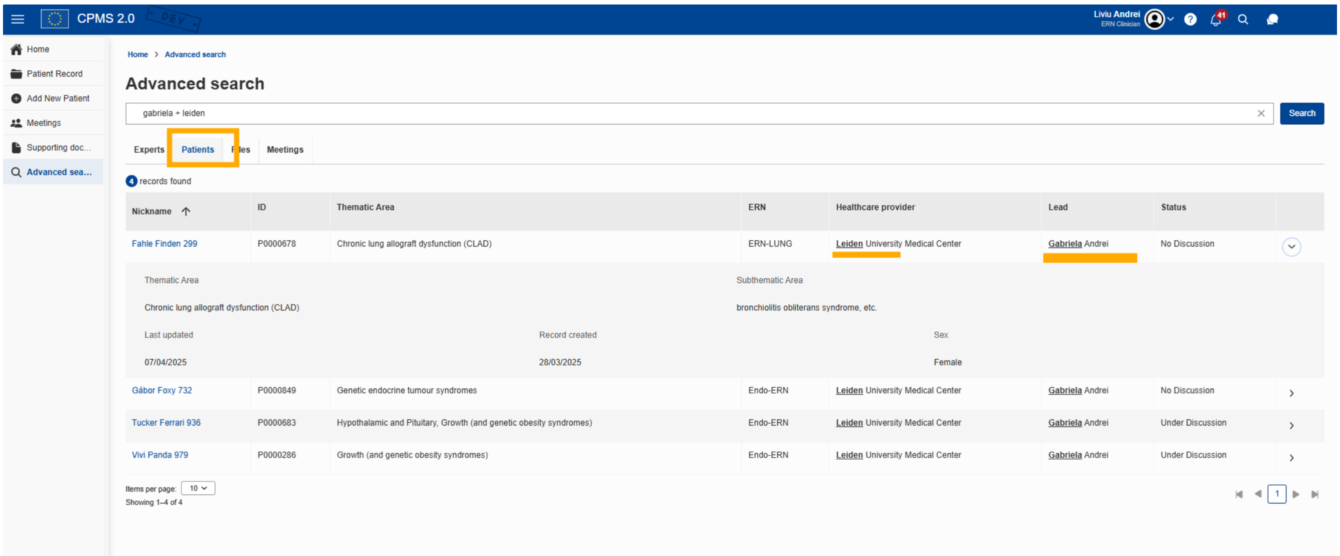
4. How can I use the results displayed in the Patients tab?

Performing a search will display in the Patients tab the CPMS 2.0 patients you have access to, based on your role and permissions. You can search for one or several patients' attributes from the list below:

- Nickname
- Patient ID
- Thematic area
- Sub-thematic area
- ERN
- HCP
- Lead
- Sex
- Record creation date
- non-anonymized information – is searchable depending on your user roles and permissions (lead of patient and his stand-ins: Name and Nationality



You can expand each record in the results list and see more details about it. Also clicking on the Nickname of the patient will lead you to that selected patient's details.



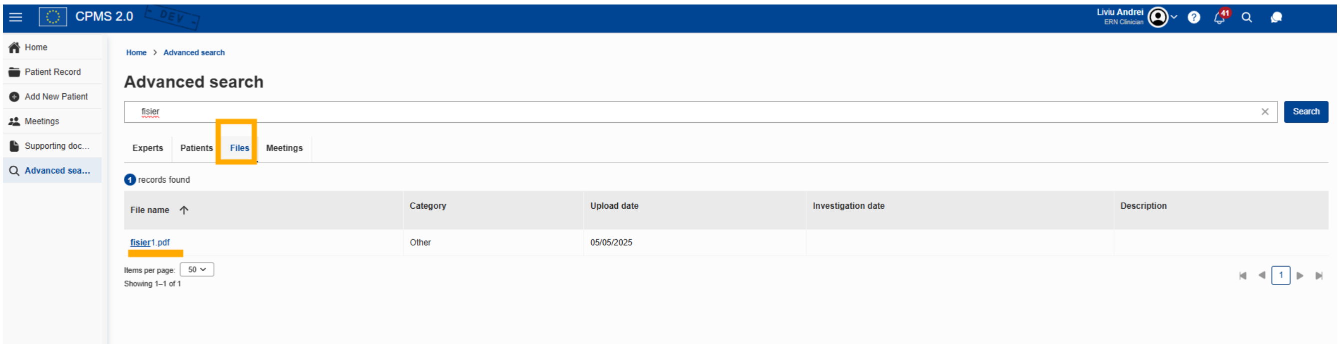
Example of search in the Patients tab: Nickname + Lead + ERN + HCP (ex: Jane + John + ReCONNET + Paris)

5. How can I use the results displayed in the Files tab?

Performing a search will display in the Files tab the CPMS 2.0 patients files you have access to, based on your role and permissions. You can search for one or several file attributes from the list below:

- file name
- file extension
- file category
- file upload date

- investigation date



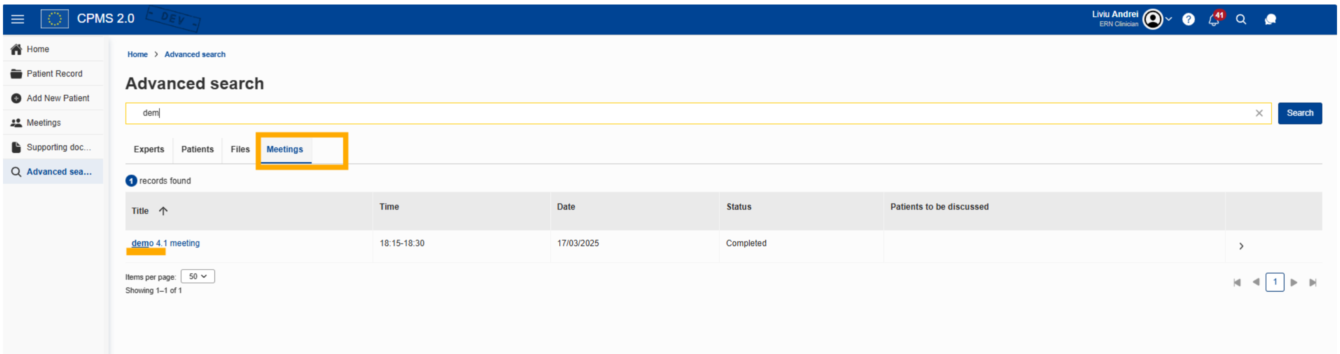
If you want to see more details about a specific record in the results list, you can click on the name of the file and a new browser tab will open, leading you to the Files list of the belonging patient. You should be aware that the search inside the content of the files is not working, so that information won't be displayed here.

Example of search in Files tab: File name + Investigation date + Category (ex: abdomen + 2024 + reports)

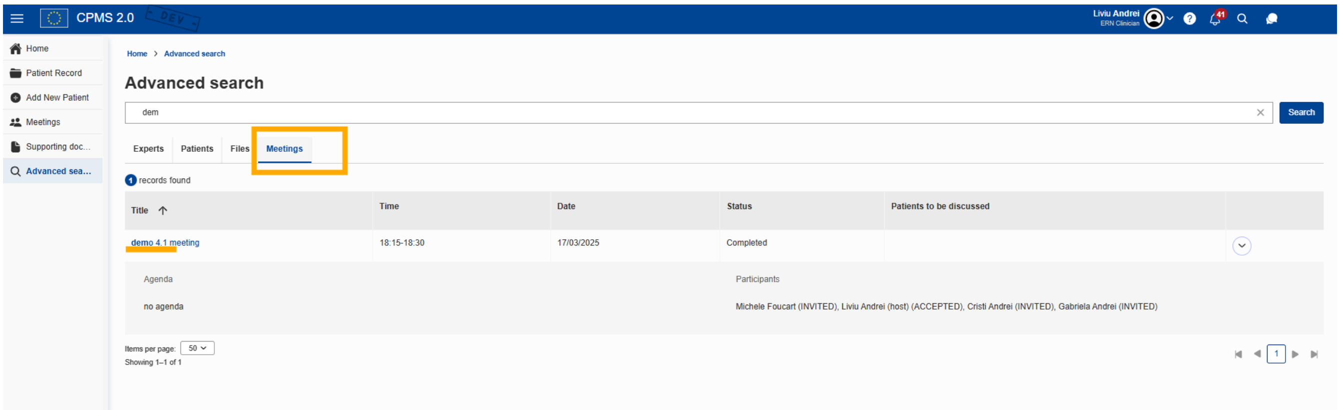
6. How can I use the results displayed in the Meetings tab?

Performing a search will display in the Meetings tab the meetings you have access to, based on your role and permissions. You can search for one or several meeting attributes from the list below:

- Title
- Time
- Date
- Status
- patients to be discussed (Nickname only will be displayed here)
- meeting host
- meeting participant



If you choose to expand the record you are interested in the results list you will see the participants status for the respective meeting and also the proposed Agenda.



The way you can access information about the results in the list is by clicking on the meeting title and you will be redirected to the meetings list, with the corresponding tab related to meeting's status.

Example of search in the Meetings tab: Title + Date + Host name + Patient name (ex: Case review + 2025 + John + Jane)

7. Can I search in other languages?

Yes, you can perform a search in other languages that are available inside the CPMS 2.0. The search is done in the language of the user that is currently selected from the top right language drop-down.

If the translation of a field is not present in CPMS 2.0, the field is displayed in default selected language and so does the search work.