European Reference Networks SHARE.CARE.CURE.



Clinical Patient Management System

Your platform for cross-border clinical discussions on rare diseases

Reference Manual - Care





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	<u>https://www.mozilla.org/en-</u> <u>US/firefox/new</u>
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: \Re +Plus to zoom in, \Re +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: <u>SANTE-ERN-CPMS-ITSUPPORT@ec.europa.eu</u>.

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 standin. 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 <u>European</u> <u>Reference Networks</u> ; 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.

	Fill in the required personal information, including your email address, full name, and
	other necessary details.
Step 3	<complex-block></complex-block>
Step 4	A notification displays, informing you that the request is ongoing.
	After providing your email address, you will receive a verification email. Open the email
	and click on the provided link to verify your account.
Step 5	Authentication Service - exdomated - exditications@inomail.ex.europa.exe 12.49 (2) minutes gelded 1 San Anna + -
	twee man k may alway u z zminase ami rekupiso o isas nai okoor ma alvere immoored sin an rekupisor yoo regisi aloo. Sent to you by EU Login
Step 6	Set up security questions to enhance the security of your EU Login account.
Step 7	Follow the on-screen instructions to complete the registration process. Once done, you
	will have successfully created your EU Login.

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: <u>https://wikis.ec.europa.eu/display/NAITDOC/EU+Login+-</u> +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: <u>https://wikis.ec.europa.eu/display/NAITDOC/EU+Login+-</u> +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".



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.

	Select "clinician"
	<form></form>
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.
	Big Out Big Out </th

	Click "Next" button.					
Step 7	Click "Next" E					
	the function of degrading degra					
	Provide detailed information about your clinical focus, including profession, thematic					
	and sub-thematic areas, and a free text input. Click "Next" after completion.					
	Fill in your "Clinical Focus"					
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	Review your information and click "Submit access request."					
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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 onscreen 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:



	From the	e user menu	ı, select "N	ly Account".				
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Step 5	focus. If	you need to	o change y	our role, please	e contact v	your ERN	l administrator.	lf you
	want to	modify info	rmation s	uch as your last	: name, fir	rst name	, email, phone n	umber,
	or EU log	gin usernam	ie, please	visit the EU log	in, accour	it 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 works works Marketer Works Marketer Mark		in the top bar of an the top bar of an the top bar of an the top bar of the second method the second me	the ap	oplication. This will open the user menu.
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	From the expanded menu, select "My Account". This will take you to your profile.						
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	⁶⁸ Click "Edit information" button						
	Simply type in the new information that you want to add or update in the relevant						
Step 5	fields.						
	Once you have entered the new information, click on the "Save" button to apply the						
Step 6	changes.						
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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:



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		However, please note that withdrawing your of the option to request account deletion, which	onsent requires you to m-accept the Printoy Policy of will make you forgotten in CPMS 2.0.	Withdraw Privacy Policy Consent

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.





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:




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:



Stop /	Once on the Notification Settings page, you'll see a list of various notification events
Step 4	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.



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?

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	-

The following table shows the default notifications settings:

	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
	Discussion open	Yes	Yes
	Closed discussion at patient level	Yes	-
	Update patients remove participant	Yes	-
Manage	Update patients add new participant	Yes	Yes
Patients	New messages in a discussion at patient level	Yes	-
	Patient - retention date upcoming	Yes	-
	Patient - remove yourself	Yes	-
	Patient discussion - "@" mention	Yes	Yes
	User's app role / clinical focus is updated by someone	Yes	-
	User is reactivated	Yes	-
User	User account updates - to ERN	Yes	-
Account	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:





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.
--------	---



	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 4	Constant of the second of t
Step 5	Review the overview page and confirm the patient creation.

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.

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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:

Step 1	Log in to the CPMS 2.0 system using your credentials.							
	Access th Crusso Crusso Crusso CPM Home Patient Record Add New Patient	e "Patient F + MS 2.0	Records	" page from the	e left-hand	side menu. ** Anastasila Shapoval Err GUARD-HEART A	* I	
Step 2	Meetings	Next meeting Title	Time	Date No upcoming meeting	Link gs!	Actions		
		Active discussions Nickname 47 Beáta Jasper 942	ID ↓↑ P0000256	View my patients only I I I I I I I I I I I I I I I I I I I	Q Search for an active dis Deadlin	scussion by nickname or ID ne ↑ Actions ⊙ ∨		
		Items per page: 10 v Showing 1–1 of 1				K ())		

	Once you	are in the "Patient	Records" pa	ige, look fo	or the search	bar. It is located abo	ve					
	the table	the table on the right side.										
	●●● ● CPMS20 ← → C & @ ∞ = CPM	CPMS 22 + CPMS 22 + CPMS 2.0 CP										
	Home Patient Record Add New Patient Meetings	Search for a patient record Search for a patient using their Nickname View my patients only 16 records found	or ID	L,	Q Bearch for a patient reco	rd						
Step 3	Supporting Docu	Nickname ↑ ID ↓↑ Thematic Ar	ea HCP Name	Record Lead	Status Last update	d ↓↑Actions						
		Ripple Rashid P0000224 Familial Elect	r AOU - Bologna	Anastasiia Shapoval	No Discussion 2 months ag	• •						
		Kris Andreea P0000287 Other - ERN 516 GUA	AOU - Bologna	Anastasiia Shapoval	× Discussed 24 days ago	•						
		Jerome Viola P0000288 Special electr 875	o AOU - Bologna	Anastasiia Shapoval	No Discussion 24 days ago	0						
		Beáta Jasper P0000256 Other rare ca	rd AOU - Bologna	Anastasiia Shapoval	Under 3 days ago	o						
		Toth Davis P0000229 Familial Elect	r AOU - Bologna	Anastasiia Shapoval	No Discussion 2 months ag	o O						
		Torres P0000232 Familial Card	io AOU - Bologna	Anastasiia	No Discussion 2 months ag	• •						
		Ivan Pereira P0000218 Familial Card	io CHU de Bordeaux	Anastasiia	No Discussion 2 months ag	o O						
	In the co	arch bar optor the	antiont's nis	(name or	ID Make cure	a you optor the correc	-+					
	informati	ion to avoid getting + MS 2.0	incorrect se	earch resu	Lts.	* * *						
	Home Patient Record Add New Patient Meetings	Search for a patient record Search for a patient using their Nickname View my patients only 16 records found	or ID	J	Q AI	×						
Step 4	Supporting Docu	Nickname ↑ ID ↓↑ Thematic Ar	ea HCP Name	Record Lead	Status Last update	d JTActions						
		Ripple Rashid P0000224 Familial Elect	r AOU - Bologna	Anastasiia Shapoval	No Discussion 2 months ag	• •						
		Kris Andreea P0000287 Other - ERN GUA	AOU - Bologna	Anastasiia Shapoval	X Discussed 24 days ago	•						
		Jerome Viola P0000288 Special elect	o AOU - Bologna	Anastasiia Shapoval	No Discussion 24 days ago	ø						
		Beáta Jasper P0000256 Other rare ca	rd AOU - Bologna	Anastasiia Shapoval	Under 3 days ago Discussion	0						
		Tóth Davis P0000229 Familial Elect	r AOU - Bologna	Anastasiia Shapoval	No Discussion 2 months ag	o 😶						
		Torres P0000232 Familial Card	io AOU - Bologna	Anastasiia	No Discussion 2 months ag	• •						
		Ivan Pereira P0000218 Familial Card	io CHU de Bordeaux	Anastasiia Shapoval	No Discussion 2 months ag	o O						
Sten 5	The table	will display nation	t details incl	uding nick	name ID th	ematic area. HCP nan	าค					
Step 5	The table	e will display patien	t details incl	uding nick	kname, ID, th	ematic area, HCP nan	ne,					

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:



	Look for t	he "View	My F	Patients	Only" swit	ch and to	ggle it to	o "Yes".	
		2-acceptance em-net.eu IS 2.0					Anastasiia Shapov ERN GUARD-HEAI	a 🔹	3
	 Home Patient Record Add New Patient Meetings 	Search for a Search for a patie View my patients only 16 records found	patient ent using th	record eir Nickname or II			Q Search fo	r a patient record	
Step 4	Supporting Docu	Nickname 个	ID ↓↑	Thematic Area	HCP Name	Record Lead	Status	Last updated ↓↑Action	ns
		Ripple Rashid	P0000224	Familial Electr	AOU - Bologna	Anastasiia Shapoval	No Discussion	2 months ago 🛛 💿	
		Kris Andreea 516	P0000287	GUA	AOU - Bologna	Anastasiia Anastasiia	X Discussed	24 days ago 🛛 💿	
		875 Beáta Jasper	P0000288	Special electro	AOU - Bologna	Shapoval	No Discussion	24 days ago 🛛 💿	
		942 Tóth Davis	P0000256	Other rare card	AOU - Bologna	Shapoval	Discussion	3 days ago 🛛 💿	
		467	P0000229	Familial Electr	AOU - Bologna	Shapoval	No Discussion	2 months ago 🛛 💿	
		Valerius	P0000232	Familial Cardio	AOU - Bologna	Shapoval	No Discussion	2 months ago 🧿	
		Ivan Pereira 866	P0000218	Familial Cardio	CHU de Bordeaux	Anastasiia Shapoval	No Discussion	2 months ago 🧿	
Stop 5	The syste	The system will show you a table with columns displaying details of your active							
Step 5	p 5 patients, filtered by 'patient owner' as the current user.								
C 1 C	To furthe	filter the	e resi	ults, you	ı can use t	he search	bar to e	enter the	patient's
Step 6	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 t	he "Patient Caracteristics of AS 2.0 Next meeting Tite Active discussions @ Nechname df Boolda Jasper 942 them are age: 10 Stowy 1-1 of 3	Record	terre la improve the diagnosis and treats	m the left-har	Actions		



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 t	he "Patient * * * * * * * * * * * * *	Record	rope to improve the diagnostic and treatment oper to improve the diagnostic and treatment Date No upcoming meet View my patients only O	A the left-hand	side menu.	
		Showing 1-1 of 1				* * () * *	



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:



	Edit field "Lead".
	• • • © CPNS20 +
	← → C ① © representation not equ CPMS 2.0 CPMS 2.0
	Nome Record created Discussion topic Open discussion Patient Record Thematic and Sub-thematic area Discussion topic Open discussion
	Special electrophysiology conditions in chil Meetings Other rare cardiac diseases in adults and c
	Supporting Do Edit healthcare provider details ×
Step 5	Healthcare provider ERN C AOU - Bologna ERN GUARD-HEART
	Christophe Keen X
	Cancel Save
	AOU - Bologna
	Lead Christophe Keen
	Edit healthcare provider details Currently no discussion is open. Open a new discussion to start messaging
	FE:1.36.0 BE: 1.36.2
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.

	Access the	"Patient Records" page fi	rom the left-hand si	de menu.	
	●●●	+ Sance or mid ea		÷ *:	
	≡ 🕐 CPMS 2	2.0	Anastasila Shapoval ERN GUARD-HEART	🗶 🤞 💷	
	Patient Record	ome Anastasila Shapoval!	and treatment of rare diseases.	$\Lambda_{\!$	
	Add New Patient Nex Meetings	ixt meeting		View all	
Ctory 2	Supporting Docu	itie Time Date	Link Action	s	
Step 2		No upcor	ning meetings!		
	Act	tive discussions View my patients only	Search for an active discussion by nicknam	e or ID	
		Nickname \$1 ID \$1 Centre	Deadline 个	Actions	
	iter	this per page: 10 V		н « () » н	
	Sho	wing 1-1 of 1			
	Navigate to	o the patient profile for w	hich you want to ed	it patient details. You can do	
Step 3	this by eith	er searching for the patie	ent's name in the se	arch bar at the top of the pa	ge
	or by brows	sing through the list of pa	atients on the page.		
	Under the '	"Details" tab click on the	'Edit patient details'	' button.	
	•••• CPMS 2.0	+			
		ND acceptance arm net ex		Anastasiia Shapoval	
	h Home	Search for a record > Bex Abby	Discussion topic	Open discussion	
	Patient Record	Bex Hide personal data	Currently there is no open discussion.		
	Add New Patient Meetings	Abby P0000235 No Discussion			
	Supporting Docu	Details Files Participants History			
Step 4		Patient Details	^		
		Sex Age Male 23 Years			
		Record created 26 March 2024			
		Thematic and Sub-thematic area			
		Thematic and Sub-thematic area Familial Cardiomyopathies in adults and/or Familial Electrical Diseases in adults and/or			
		Thematic and Sub-thematic area Familial Cardiomyopathies in adults and/or Familial Electrical Diseases in adults and/or Other rare cardiac diseases in adults and c			
Step 4	or by brows Under the ' Constant of the solution CPN Home Patient Record Add New Patient Meetings Supporting Docu	sing through the list of participants and the	Atients on the page. 'Edit patient details'	' button.	

		pop-up, edi	it the themation	: and sub-themati	ic.	
	Fields to fi	ll in in case	vou are the u	iser who created t	he record. its	stand-in. the patient
	lead or its	stand-in:	,		,	<i>,</i> ,
	= 👩 срмз 2.0 😂	EV				Livis Andrei 🔘 🗸 🙍 🥀 Q. 🍙 🕀
Step 5	CPMS 2.0 Have	record > Alexandra Andereson 871 In Circa Too Baseling Price Participants History retails resoluted resoluted flub thematic area or veloted responder details responder resoluted Libon	e data Edit patient details First New*		Cancel Ca	er patient is enrolled:
			you are then			
		S 2.0 Sex				Andrei () ~ () () () () () () () () () () () () ()
	Hertus to H CPMs Home Patient Record Add New Patient	S 2.0 Sex Female	Age @	Discussion topic	Liviu uniedion X	Andrei 💽 V 🕐 🤔 Q 🌧 🕀 E
	CPMs CPMs CPMs CPMs CPMs CPMs CPMs CPMs	S 2.0 Sex Female Record created 13 November 2024	Age @ Edit patient details	Discussion topic		Andrei () V () () () () () () () () () () () () ()
	CPMS CPMS CPMS Patient Record Add New Patient Meetings Supporting doc Advanced search	S 2.0 Sex Female Record created 13 November 2024 Thematic and Sub-the	Age Edit patient details Thematic Area * Growth (and genetic obesity synt	Discussion topic		Andrei 💽 v 🕐 🦨 Q 🌑 🖶 E
	CPMS CPMS CPMS CPMS CPMS CPMS CPMS CPMS	S 2.0 Sex Female Record created 13 November 2024 Thematic and Sub-thee S Other - Endo-EF	Age @ Edit patient details Thematic Area * Growth (and genetic obesity syns Thematic Area	Discussion topic disc	uniedana X	Andrei
	CPMS CPMS CPMS CPMS CPMS CPMS CPMS CPMS	S 2.0 Sex Female Record created 13 November 2024 Thematic and Sub-the > Other - Endo-EFF Edit patie	Age © Edit patient details Thematic Area * Growth (and genetic obesity sym Them Subthematic Area Growth hormone resistance × Subthematic Area	romes) ×	ervection.	Andrei
	CPMS	S 2.0 Sex Female Record created 13 November 2024 Thematic and Sub-the S Other - Endo-EF Edit patte Healthcare provider der ERN Erdo-FRN	Age © Edit patient details Thematic Area * Growth (and genetic obesity sym Them Subthematic Area Growth hormone resistance × Subthematic Area	romes) × atics ×		Andrei
	CPMS	S 2.0 Sex Female Record created 13 November 2024 Thematic and Sub-the S Other - Endo-ER Healthcare provider def ERN Endo-ERN Healthcare provider	Age Edit patient details Thematic Area * Growth (and genetic obesity sym Them Subthematic Area Growth hormone resistance × Subthematic Area	romes) × atics	erundion Cancel Save	Andrei · · · · · · · · · · · · · · · · · · ·
	CPMS	S 2.0 Sex Female Record created 13 November 2024 Thematic and Sub-ther Other - Endo-EFR Edit patter Healthcare provider de ERN Endo-ERN Healthcare provider AOUI Verona	Age © Edit patient details Thematic Area * Growth (and genetic obesity synt Then Subthematic Area Growth hormone resistance × Subthematic Area	romes) × atics	Cancel Save	Andrei 💽 V 🕐 🦨 Q 🍙

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.
--------	---



	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.
	Click here Captain Captain Constant last
	Add How Patters Massimo Massimo Volperation and X
	Supporting Docu Preserver new faller only angle file cample updated an once: applies may only contain Dic Oli Files Choose file Drag and drop file here
Step 6	Here you can add details about this file: File category Fi
	Description Please inset the file description here
	By ticking this checkbox, you confirm that you have checked and manually removed all identifiable personal data from selected file(s). Including comments & annotations. *
	Cancel Uptood
	Överently na döpsammen in spope. Open at sever döpsammen at sever döpsammen at sever döpsammen at sever döpsammen.
	Once the file is selected you'll be prompted to fill in details such as the file sategory
	investigation date, and a free-text description. Provide accurate information to
	onbance the context of the unloaded 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."
	Add details about the file
Stop 7	Add New Patient Massimo Massimo Jupicad File x
Step 7	Supporting Dots Prease note that only single file can be uploaded at oncezip files may only contain DICOM files Ciscus file Dag and drop file here
	BP, Str., Form, Impl.pptx 18.29 MB application/vnd openumtformats-officadocument presentation in x 18.29 MB total size
	Here you can add details about this file: File category Investigation date
	Description Please insert the file description here
	By ticking this checkbox, you confirm that you have checked and manually removed all identifiable personal data from selected file(s), including comments & annotations.*
	Cancel



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 <u>Zip and unzip files - Microsoft Support</u>.

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.



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.



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.



	A pop-up window will appear with various options. Click on the "Download file" button.
Step 6	CPMS2 CPMS2.0 CPM
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:





	A pop-up will appear, allowing you to edit information such as file category.
	investigation date, and description
	investigation date, and description.
	 C CMS20 + C C Q ■ constances on retau C A ■ constances on retau
	ERN CLARS 2.0
	Home Discussion topic Discussion topic Discussion topic Discussion Discuss
	Ads New Par Edit file details X
	Meetings Ide-example_PDF_1MB.pdf Investigation data
Step 7	■ Supporting D: ← PDF ~ 17/04/2024
	Description
	Please insert the file description here
	By ticking this checkbox, you confirm that you have checked and made sure there is no identifiable personal data from the text above. *
	Cancel Save
	> PDF 16/11/2023 • :
	Imaging 06/07/2023 Imaging Currently no discussion is open. Open a new discussion to start messaging
	Save the changes and the updated details will be visible in the patient's files tab
	More File category 41 Date 4 Actions Discussion topic 1 Open discussion Open discussion
	Add New Paris Edit file details ×
	Moetings III-example_PDF_1MB.pdf 1017.73 KB
C 1 O	Supporting Do PDF 17/04/2024
Step 8	Description
	Prease moert uite ine description here
	By ticking this checkbox, you confirm that you have checked and made sure there is no identifiable personal data from the text above. *
	Save
	> PDF 16/11/2023 • :
	Currently no discussion is open. Open a new discussion to start messaging
	1

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:



	A pop-up wi	ill appear with different options. Click on the "Copy File Link" with the file.	button
	← → C Q Q		(a) a 1
	= 🔅 CPN	MS 2.0 Anastasi Erin gua	e Shapoval 👔 🧳 🤌
	Home Patient Record Add New Patient	Search for a record > Kelly Melass Kelly Melissa P0000220 Discussion Discussion topic () Currently there is no open discussion.	Open discussion
	Supporting Docu	Datally Eller Berlinsten Michael	
Step 6		More File category IT Date II Actions > Other Imagina Imagina Imagina Imagina > Imagina 08/04/2024 Imagina Imagina Deb/04/2024 > Imagina 08/04/2024 Imagina Imagina Deb/04/2024 > Imagina 08/04/2024 Imagina Copy file link	
		> Imaging 06/03/2024 @ 💼 Celete file	
		> POF 05/03/2024 @ 1	
		> 📑 Imaging 05/03/2024 💿 🗄	
		PDF 05/03/2024 Currently no discussion is open. Open a new discussion	n to start messaging
Step 7	A success m	nessage will appear, confirming that the file link has been co	pied.

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.





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:



	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					
Step 3	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.					
	Add participant ×					
	Search Please add filters to begin the search Search by group					
	Q Owneral search Name 4 ⁺ ERN Centre 4 ⁺ Profession 4 ⁺					
	Name					
	Search by name Thematic Area					
	Centre					
	Search by centre Profession					
	Search by profession Cares for					
	Search Search					
	Cancel Add participant					
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					
	matching the specifica criteria. Neview the list to find the colleague you want to dud.					
	Search Search by group	32 results found Selected criteria ERN-RND ×				
------	---	---	--	--	--	-------
	Q General search	Clear all				
	ERN-RND ~	Name ↓↑	ERN	Centre ↓↑	Profession ↓↑	
	Name Search by name	Monica-Gabriela Mitrea-Atomi	EURO-NMD, GUARD-HEART, ReCONNET, Endo-ERN, ERN-RND, EURACAN, MetabERN, RARE-LIVER	Assistance Publique-Hôpitaux de Paris, Hôpital Pitié-Salpétrière	Biologist	
	Thematic Area	Gabriela Andrei 🗉	RITA, ERN-RND, ERN-LUNG, GENTURIS, Endo-ERN	Leiden University Medical Center	Clinical/Biochemical Geneticist	
ep 5	Centre	Monica Regression	ERN-RND, EpiCARE	Assistance Publique-Hôpitaux de Paris, Hôpital Pitlé-Salpétrière	Microbiologist	
	Search by centre	Tamara Martin	ERN-RND	Hôpital Universitaire de Bruxelles(HUDERF-Erasme)	Other	
	Profession Search by profession	Kasper BEDSTED	PaedCAN, TRANSPLANTCHILD, ERN- RND, eUROGEN, EpiCARE, Endo- ERN, MetabERN, BOND, GUARD- HEART	Copenhagen University Hospital, Rigshospitalet	Internist	
	Cares for Search Search	Kasper BEDSTED	RARE-LIVER, EURO-NIMD, CRANIO, ERRIVNE, RITA, EURACAN, ERN-RND, PaedCAN, BOND, GUARD-HEART, EpiCARE, ITHACA, ERN-EYE, ERN- LUNG, GENTURIS, eUROGEN, ReCONNET, EuroBloodNet, VASCERN, Endo-ERN	Aarhus University Hospital	Clinical geneticist	
		Stephane Berteau	EuroBloodNet, ERN-LUNG, ITHACA, ERN-SKIN, Endo-ERN, ERN-RND, EURO-NMD	Hôpital Universitaire de Bruxelles(HUDERF-Erasme)	Allergologist	
		Tamara Braun	ERN-RND	AOU Consorziale polyclinic - Bari	Radiologist	
	Click the "Ac	d Participant" bu	utton.		Cancel	Add p
	Click the "Ac Add participant Search Search by group	Ad Participant" bu 32 results found Selected criteria Clear all ERN-RND ×	utton.		Cancel	Add p
	Click the "Ac Add participant Search Search by group Ceneral search ERN ERN	22 results found Selected criteria Clear all ERN-RND X	Jtton.	Centre 17	Cancel Profession ↓↑	Add p
	Add participant Search Search by group General search ERN ERN-RND V Name Search by name	Selected criteria Clear all Monica-Gabriela Mitrea-Atomi	LITTON.	Centre 4? Assistance Publique-Hópitaux de Paris, Hópital Pité-Salpétrière	Cancel Profession ↓↑ Biologist	Add p
	Add participant Search Search Search by group C General search ERN ERN-END ~ Name Search by name Thematic Area	32 results found Selected criteria Clear all Marrie 31 Monica-Gabriela Mitrea-Atomi Sabriela Andrei	ERN EURO-NMD, GUARD-HEART, ReCONNET, Endo-ERN, ERN-RND, EURACAN, MetabERN, RARE-LIVER RITA, ERN-RND, ERN-LUNG, GENTURS, Endo-ERN	Centre 47 Assistance Publique-Höpitaux de Paris, Höpital Pitie-Salpétrière Leiden University Medical Center	Profession 41* Biologist Clinical/Biochemical Geneticist	Add p
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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.



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:

Stop 1	Log in to your account and access the patient profile you want to add a group of
Step I	participants to.
Sten 2	Click on the "Participants" tab within the patient profile to manage and add participants
Step 2	to the patient discussion.
Sten 3	Click on the "Add Participant" button to start the search process. This will take you to the
Step 5	search panel.
	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.
	Add participant ×
	Search by group
Step 4	Contrain solution Name LT ERN Centre Profession LT
	Name
	Security Junite
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	Cares for Search
	Search
	Cancel Add purficipant

	Select the gr	oup you want to add. This ensures that you are a	dding particip	ants from	ıa
	specific group to enhance collaboration. Please note that you can select groups from				
	your own ER	N's and cross-ERN groups if needed.			
	Add participant				×
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	Press the bur assess their suitable for i	tton "View group members" to explore the membe expertise and qualifications. This step ensures tha nclusion in the patient discussion.	rs of the sele t the group m	cted grou nembers a	p to are
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				Cancel	dd participant

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:

Step 1	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
	havigate to the patient prome from which you want to remove a participant.
Step 2	Click on the "Participants" tab within the patient profile.
	After accessing the "Participants" tab, identify the participant you intend to remove
Step 3	from the discussion. The list of participants will include their name.
Step 4	<text></text>
Step 5	A confirmation pop-up will appear, providing details about ongoing discussions if
	applicable.

	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.				
	Click on the "Remove" button				
	A set for fame Former				
Step 6	Processor from (); Autors) Constrained from (); 1 Constrained from (); 1				
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	And Description and Descriptio				
	And a second sec				
	Once you've confirmed the removal, the participant will no longer appear in the list of				
Step 7	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.

	After accessing the "Participants" tab	, click on the three dots.
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	≡ CPMS 2.0	Anastasila Shapoval 🕘 🦨 🥵
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Step 4	Click on the "Leave" option after pres	sing three dots located next to your name.

●●● © cPM520 ← → ⊂ ☆ @ @	Click on the "Leave" button inside the confirmation pop-up.				
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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.

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	Healthcare provider details		\odot	
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	Type Education	Given?		
	Type Registries Inclusion	Given?		
	Retention date 11 April 2040			
	Edit consent Forget Patient			
CDM2 2.0 1.59.0				Currently no discussion is open. Open a new discussion to start messaging

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:





	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.				
Step 7	CPMS 2.0 CPMS 2.0	Image: Control of the set of the se			
	Record created 10 January 2025 Thematic and Sub-thematic area				

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.



Once	e you have made your selections, click "Open Discussion" to proceed.
Step 7	The constraint The constraint </th

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.				



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	<complex-block></complex-block>				



	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				
	saved on your local PC if you want.				
Step 7	Seven of your total PC IT you want. Patient P0000510 Thematic area: Adrenal Sub-thematic area: Discussion closed on - still opened Experts involved Record Lead: Moni MM of UniversitÄetsklinikum Experts having contributed: MÄXnster / RITA, Endo-ERN unit Liviu Andrei (CG developer) (Biologist) 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 discussion lead) With my best regards, With my best regards, Moni MM (discussion lead)				
	Once you are sure about the closure comment, press the button "SignOff". The				
Step 8	discussion status will automatically change to "Discussed" and the patient record				
	status will update to "Discussed".				

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. Details Files Participants History		



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:





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	<image/>			

Step 4	Fill in the details for the meeting, including title, date, time, recurrence and agenda. Image: Contraction Image: Contraction
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."

	Save your meeting details to view the scheduled meeting in the "Upcoming Meetings"
	tab.
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	Title *
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Step 6	Add participant
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	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

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:

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	<complex-block></complex-block>			

	In the schedule meeting pop-up, click on the "Add recurrence" button to set up a				
	recurrence.				
	Schedule meeting	×			
	Title *				
	Patients to be discussed Serna Gliddy 0 ×				
	Participants	Q			
	Gabrela Andrei X Luviu Andrei X lulia lulia X Add participant				
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	Choose the recu	rrence pattern you want. You can choose weekly, daily or mo	nthly.		
	• Daily: Ev	ents repeat every day or every X days.			
	• Weekly:	Events repeat every week on specific days (e.g., every Monda	ay, every		
	Wednesd	ay, every Friday).			
	• Monthly: Events repeat on a specific weekday of the month (e.g., the first				
	Monday o	of every month).			
	Schedule meeting		×		
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Ston 6	Patients to be discussed Sanna Giddy 0 ×				
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	Customize the pattern:	
	• Daily: Specify the number of days between occurrences.	
	Add recurrence Start interval September 25, 2024 Levery End interval * September 25, 2024	
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Step 7	Add recurrence Start interval September 25, 2024 Veck	
	• Monthly: Choose the day of the month or the weekday of the month (e.g., the	
	first Monday).	
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Step 9	Schedule meeting Tite* Ite* Ite* Ite* Add recurrence Sart interval Gabrela Andrei × Luku Andrei × Iuka Start time* Start time* Tube Start time* Start tim Start time* Start time* Start time*	x
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Step 9	Schedule meeting Tile * Tile * Paticipants Start line* Add recurrence × Participants Start line* I 10052025 Very Repeat on Sum thme Tue Kers Start line* Repeat on Sum thme Tue Kers Start line* Star	x
Step 9	Schedule meeting	x
Step 9	Schedule meeting Tite * I te * Patients to be discussed Serie added of a X Participants Gebreia Andrei X Liviu Andrei X Liviu Andrei X Liviu Add fauricipant Start time* Add recurrence Start time* Add recurrence T C C C C C C C C C C C C	x
Step 9	Schedule meeting Tite* Tet* Tet* Tet* Protections Start interval Start	x
Step 9	Schedule meeting Tie* Est meeting Tie* Est meeting Patients to be discussed Serie added 9 & Add recurrence Start line* Start	x
Step 9	Schedule meeting Tie * Ite *	x
Step 9	Schedule meeting Tite* test meeting Prides to be discussed Served diddy 0 x Start interval Start interva	x
Step 9	Schedule meeting Te* Ext meeting Patents to be discussed Sama dodo / 0 × Add recurrence V Ford spinds Add recurrence Ford Start time* Add recurrence Ford Start time* Add recurrence Ford Start time* Add recurrence Corr Cor	x

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".	

	In the "Upcoming" tab, find the specific meeting you are interested in.	
	≡ CPMS 2.0	
Step 3	Home Home > Meetings	
	Patient Record Meetings	
	Add New Patient Upcoming Completed Declined	
	a meetings	
	Click on the arrow inside the action column in the table for the desired meeting.	
	● ● ● ● ○ CPMS20 + ← → C A © contribution set not as A ★ 1	
	EPMS 2.0	
	Home Home > Meetings	
	Add New Patient	
	Meetings Upcoming Completed Declined From To To To	
	supporting Uodu 25/09/2024 ddimmiyyyy E Apply	
Step 4	1 upcoming meetings	
	Title J? Time Date ↑ Link Status ↓? Actions Consultation of a difficult https://cpms2-	
	case 11.45 - 12.00 to min 18 Ucl 2024 accept Accepted Join I Accepted Join	
	Showing 1-1 of 1	
	CPMS 2.0 - 1.42.4	
	Inside the meeting details, you can access the full agenda, participants list, and any	
Step 5	relevant information.	

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".	

	In the "Upcoming" tab, find the specific meeting you are interested in.
Step 3	Home Home > Meetings
	Patient Record Meetings
	Add New Patient Upcoming Completed Declined
	Weetings
	Click on the "Pencil" icon inside the action column in the table for the desired meeting.
	● ● ● ② CM325 + ← → C ∧ ③ grad produces an end as 0 ★ 1
	E CPMS 2.0 Asstatia Baserof 👔 🖉 🦨 🛱
	Konne Honne > Meetings Schedule meeting
	Add Hew Patent Monoming Lipcoming Completed Declined
	Deporting Docu. From To 25/09/2024 B dot/mm/typy B
Step 4	1 upcoming meetings
	Link Link <thlink< th=""> Link Link <thl< th=""></thl<></thlink<>
	Borrang por page 10 V . Showing 5-1 of 1
	CPMS 2.0 - 1.42.4

Review and make any necessary changes to your meeting.	
, , , , , , ,	
Edit meeding ×	
Itel meeting Patients to be discussed	
Seria Giddy 0 x Q Q Pesse choose Q	
Participants Gathrelia X Iufia X Unru X	
Add participant Start time * End time *	
Date A A Duration Your timecone May 14, 2025 14 15 14 15 15 min 145/2025, 12:16:30 Eur V V V V V V V	
Add recurrences There are no scheduled recurrences at the moment. Agenda	
Patients to be discussed are:Sema Giddy () Input agenda	
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 * Cancel Same	
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	
Scroll down to the bottom of the pop-up and check the disclaimer.	
Please choose	
t cm da this manufacture and lacknowledge that I am aware of my relevant data protection responsibilities and I will only share data that is medically relevant to the meeting set, we may includes no identifying patient information *	
Cancel	

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

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. Image: CPMS 2.0 Home Home Home Meetings Add New Patient Upcoming Completed Declined	

	Click on the "Join" button inside the action column in the table for the desired		
Step 4	meeting.		
	● ● ● © CPM520 + ← → C O © Grand acceptance are notedu		
	E CPMS 2.0 Aastalia Shapovit D &		
	Patient Record Meetings Add New Patient		
	Westings Upcoming Completed Declined Supporting Decu. From To		
	2509/2024 a Apply 1 upcoming meetings		
	Title U? Time Date ? Link Status U? Actions		
	Cumulatory of a denicular case Rems per page. To √ Rems per page. To √ Rems per page. To √		
	Browing (=1 of 1		
	CPMS 20 - 1.42.4		
	You will be prompted to choose whether to join with your microphone enabled or in		
	listen mode.		
	How would you like to join the audio?		
Step 5			
	\mathbf{U} \mathbf{d}		
	Microphone Listen only		
	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".		
	CPMS 2.0 × b BigBlueButton - Consultation × +		
Step 6	\leftrightarrow \rightarrow C \square video.ncpms-dev.ern-net.eu/html5client/join?sessionTo		
	MESSAGE pms-dev ern-pet eu wents to X		
	General chat Use vour microphone		
	PARTICIPANT MANAG		
	Participants		

	Check your audio settings by saying a few words and check if you hear the echo.	
Step 7	✓ Change your audio settings Please note, a dialog will appear in your browser, requiring you to accept sharing your microphone. Microphone source Default - MacBook Pro Microphone (Built-in) Default - MacBook Pro Speakers (Built-in) Default - MacBook Pro Speakers (Built-in) Wirr audio stream volume	
	Back Join audio	
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:







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.

	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.	
If you successfully connected to the		
meeting but:		
 You cannot hear the participants; 	Try disabling and re-enabling audio.	
 The participants cannot hear you; 		
 The participants cannot see you; 		
	Try leaving and re-joining the meeting.	
	Try clearing the browser cache, close it and launch it	
	again or try joining the meeting using a different	
	browser.	
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:

	Look for the "Presentation" icon. It's located towards the bottom of the screen. Click
Step 1	on the "Presentation" icon.
	Choose what you want to share: Your Entire Screen or an Application Window or Tab.
	Choose what to share with video.ncpms-dev.ern-net.eu f The site will be able to see the contents of your screen
	Chrome Tab Window Entire screen
	Select a tab to share
Step 2	
	Also share tab audio
	Cancel Share
	Once you have configured the screen share to your preference, press on the "Share"
Step 3	button to begin sharing with attendees.

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:



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.
	MESSAGES
	Public Chat
Step 2	Go to the white box located in the bottom of the screen.
	Message Public Chat

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.	
	Joanna Hornick	
	Select from the menu "Give whiteboard access" option	
	\oslash Start a private chat	
Step 2	Ø Give whiteboard access	
	🛱 Make presenter	
	I Promote to moderator	
	⊗ Remove user	

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 2	Select from the menu "Promote to moderator" option.
	😾 Make presenter
	⊲ Promote to moderator
	⊗ Remove user

17. How to remove a user inside the meeting?

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

	Click on a username of the participant you want to remove.
Step 1	Jon Johanna Hornick
	Select from the menu "Remove user" option.
Stor 2	
Step 2	🖵 Make presenter
	Promote to moderator
	⊗ Remove user
	The confirmation pop-up will appear. Press on the "Yes" button if you want to remove
Step 3	the user from the meeting.
	×
	Remove user (Johanna Hornick)
	Ves No
10	

18. How to mute all users inside the meeting?

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

	Click on the "Gear" icon in the left corner.
Step 1	MESSAGES
	R Public Chat
	USER MANAGEMENT
	Waiting Users
	USERS (2)
	Terrance Van Donk (You)
	Jong Johanna Hornick
	Select from the menu "Mute all users" option.
	☐ Lock viewers
Step 2	
	Save user names
	Sections

19. How to save usernames inside the meeting?

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



	Select from the menu "Save usernames" option.
Step 2	
	A Lock viewers
	은 Guest policy
	Save user names
	Sear all reactions
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:

	Inside the pop-up click on the "Yes" button to start recording.
Step 2	
	To confirm that the recording is in progress, a visual indicator (a red dot) will be
Step 3	displayed at the top of the screen.
	Consultation of a difficult case 00:12
	When you're ready to pause the recording, click on the "Pause Recording" button,
	which is located at the top of the screen.
Step 4	C O C C C C C C C C C C C C C C C C C C



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 . Image: CPMS 2.0 Home Patient Record Add New Patient Meetings Upcoming Completed Declined	
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. records Patients to be discussed (0)	

22. How can I leave the meeting?

To leave the meeting, please follow these steps:



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



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

To check for completed meetings, please follow these steps:

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 "Completed" tab.						
Step 5	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.						

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".				



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".			



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.

	Choose your response. Click on one of the following buttons at the top of the meeting				
	window:				
Step 2	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?

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.					

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

	Click on the "Eye" icon inside the action column in the table for the desired meeting.
Step 4	Image:
	Fill in the meeting summary inside the message box.
	Meeting Summary ×
Step	test meeting
5	B I <u>0</u> S · · · · · · · · i ≡ :≡ summary 2 (= summary 1 edited)
	Cancel Summary history Update Summary
	Click on the "Update Summary" button.
	Meeting Summary ×
Chan	Title *
Step 6	
	summary 2 (= summary 1 edited)
	Cancel Summary history Update Summary

	You can view the history of the Meeting summary by clicking the "Summary history"
	fou can view the history of the meeting summary by clicking the Summary history
	button
	Meeting Summary ×
	Title *
	test meeting
	B ℤ <u>U</u> ⊕ ↔ ₩ ≡ ≔
	summary 2 (= summary 1 edited)
.	
Step	Cancel Summary history Update Summary
7	
	This will open a new tab in which all the historical versions of the summary are
	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
	and the time of creation are displayed.
	C (O aboutblank Q
	0 w3 dp Mail 🞦 DGSante
	Liviu Andrei - 14/05/2025
	summary 2 (= summary 1 edited)
	Liviu Andrei - 14/05/2025
	summary 1

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	2 From the left-hand side menu, select "Meetings".				

	Check the "Upcoming" and "Completed" tab to see the meetings you are invited a					e invited and		
	those hosted by users from your ERN (for the meetings hosted by users from your ERN							
	in which	n vou are not invi	ted vou will	see "N/a"	in the column s	status) [,]	·	
	in which you are not invited you will see N/a in the column status).							
	More Meetings Meetings Completed Declined							
Step 3	Supporting doc Q Advanced search	From Io 03/28/2025 Image: Comparison of the section of						
		Title ↓↑	Time	Date 🛧	Link	Status ↓↑	Actions	
		my personal meeting	08:30 - 08:45 15 min	28 Mar 2025	Click here to join meeting	Accepted	Join 💿 🖊 🏓 🖬 📫	
		C Recurring every 4th monday	10:45 - 11:15 30 min	28 Apr 2025		N/a	⊙ ∕ ѝ ፤	
		C Recurring every 4th monday	14:45 - 15:15 30 min	26 May 2025		N/a		
		C tc11	15:00 - 15:15 15 min	27 May 2025		N/a	 ✓ / ✓ / 	
		C 1c10	14:45 - 15:15 30 min	04 Aug 2025		N/a	⊚ / ♠ ፤	
	On the	meetings you are	seeing beca	ause they	are hosted by	users fron	n your ERN you	
	can do the following actions:							
	- Edit meeting							
	- Forward meeting							
Step 4	- 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".

	In the "Upcoming" tab, find the specific meeting you wish to forward.
C 1	
Step	Home > Meetings
3	Patient Record Meetings
	Add New Patient
	Meetings Upcoming Completed Declined
Step 4	Click on the "Arrow" icon inside the action column in the table for the desired meeting.



	Add participant					×
	Search Search by group	Please add filters to begin the search				
	Q General search	Name ↓↑	ERN Centre ↓↑		Profession ↓↑	
	ERN Mame Search by name Thematic Area Centre Search by centre Bearch by profession Cares for Search Search					
	Select the co	lleague vou war	nt to add from th	ne list	Cancel Add part	cipant
	Add participant	meague you war				×
	Search Search by group	32 results found Selected criteria Clear all ERN-RND X				
	ERN-RND ~	Name ↓↑	ERN	Centre ↓↑	Profession ↓↑	
	Name Search by name	Monica-Gabriela Mitrea-Atomi	EURO-NMD, GUARD-HEART, ReCONNET, Endo-ERN, ERN-RND, EURACAN, MetabERN, RARE-LIVER	Assistance Publique-Höpitaux de Paris, Höpital Pitié-Salpétrière	Biologist	>
Step	Thematic Area	Gabriela Andrei	RITA, ERN-RND, ERN-LUNG, GENTURIS, Endo-ERN	Leiden University Medical Center	Clinical/Biochemical Geneticist	>
P	Centre	Monica Regression	ERN-RND, EpiCARE	Assistance Publique-Hôpitaux de Paris, Hôpital Pitlé-Salpétrière	Microbiologist	>
6	Search by centre Profession Search by profession	Te mara Martin	ERN-RND PaedCAN, TRANSPLANTCHILD, ERN- RND, eUROGEN, EpiCARE, Endo- ERN, MetabERN, BOND, GUARD- HEAPT	Höpital Universitaire de Bruxelles(HUDERF-Erasme)	Other	>
	Cares for Search Search	Kasper BEDSTED	RARE-LIVER, EURO-AMD, CRANIO, ERKNet, RITA, EURACAN, ERN-RND, PeadCAN, BOND, GUARD-HEART, EpiCARE, THTAGA, ERN-EVE, ERN- LUNG, GENTURIS, eUROGEN, ReCOMET, EuroBloodNet, VASCERN, Endo-ERN	Aarhus University Hospital	Clinical geneticist	>
		Stephane Berteau	EuroBloodNet, ERN-LUNG, ITHACA, ERN-SKIN, Endo-ERN, ERN-RND, EURO-NMD	Hôpital Universitaire de Bruxelles(HUDERF-Erasme)	Allergologist	>
		Tamara Braun	ERN-RND	AOU Consorziale polyclinic - Bari	Radiologist	>
					Cancel	dd participant

	Add participant					×
	Search Search by group	32 results found Selected criteria Ciear all ERN-RND ×				
	ERN-RND ~	Name ↓↑	ERN	Centre ↓↑	Profession ↓↑	
	Name Search by name	Monica-Gabriela Mitrea-Atomi	EURO-NMD, GUARD-HEART, ReCONNET, Endo-ERN, ERN-RND, EURACAN, MetabERN, RARE-LIVER	Assistance Publique-Hôpitaux de Paris, Hôpital Pitié-Salpétrière	Biologist	>
Sten	Thematic Area	Gabriela Andrei 🖩	RITA, ERN-RND, ERN-LUNG, GENTURIS, Endo-ERN	Leiden University Medical Center	Clinical/Biochemical Geneticist	>
- top	Centre	Monica Regression	ERN-RND, EpiCARE	Assistance Publique-Hôpitaux de Paris, Hôpital Pitié-Salpétrière	Microbiologist	>
7	Search by centre	Tamara Martin	ERN-RND	Hôpital Universitaire de Bruxelles(HUDERF-Erasme)	Other	>
•	Profession Search by profession	Kasper BEDSTED	PaedCAN, TRANSPLANTCHILD, ERN- RND, eUROGEN, EpiCARE, Endo- ERN, MetabERN, BOND, GUARD- HEART	Copenhagen University Hospital, Rigshospitalet	Internist	>
	Search Search	Kasper BEDSTED	RARE-LIVER, EURO-NMD, CRANIO, ERKNøt, RITA, EURACAN, ERN-RND, PædCAN, BOND, GUARD-HEART, EpiCARE, ITHACA, ERN-EYE, ERN- LUNG, GENTURIS, øUROGEN, ReCONNET, EuroBloodNet, VASCERN, Endo-ERN	Aarhus University Hospital	Clinical geneticist	>
		Stephane Berteau	EuroBloodNet, ERN-LUNG, ITHACA, ERN-SKIN, Endo-ERN, ERN-RND, EURO-NMD	Hôpital Universitaire de Bruxelles(HUDERF-Erasme)	Allergologist	>
		Tamara Braun	FRN-RND	AOU Consorziale polyclinic - Bari	Radiologist	× 1

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.





	Review your information and click "Submit access request."	
	To Preme CPMS 2.0 Herminia Appletose 💽	
Step 11	Sign Up Presse complete these questions to request access to CPMS 2.0. Page 3 or 3 Overveel Place more productionation before submitting Place more production before submitting Place more productionat	
	Email* onat@onal.com	
	Phone number 1 - >	
	EU username * r8533452	
	Professional Infernation Raine* Adaptarit	
	ERN* ERN BOND	
	Centre * Aurtus University Hospital	
	Clinical Focus Focus area Focus area	
	Submit access request	

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 $\downarrow\uparrow$	Actions
Birut Waddle 737	P0000164	Rare Multisyste	AZ Sint-Marteen	Terrance Van Donk	Under Discussion	24 days ago	Ο
Clever Lily	P0000023		Cancer Institute Lisbon	Terrance Van Donk	Under Discussion	4 days ago	Ο
Jacob Braun 41	P0000166	Rare Multisyste	Hospital Universitari Vall d'Hebron	Terrance Van Donk	No Discussion	24 days ago	Ο
Schubert Davide 63	P0000167	Rare Multisyste	Pediatric hospital Bambino Gesù, Rome	Terrance Van Donk	No Discussion	20 days ago	0

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	<complex-block></complex-block>

	Write ar	nd send a message	inside the o	discussion.		
		• MS 2.0				Herminia Appleton ERN «UROGEN
	Home	Search for a record > Clever Lily Terrance Van Donk	•	Discussion topic Today, let's delve into the ongoing progress treatment for soft tissue sarcoma.	and specific considerations for Clever Lily, who is und	Engoing Close the discussion
	 Add New Patient Meetings Supporting Docu 	Clever Hide personal data Lily P000023 Control Control		Vere more V Torrance Van Donk @Dareau Morgan; @Herr	ninia Appleton could you please	2401 1247
		Healthcare provider details	~	Terrance Van Donk How is Clever Lilly doing?	§Terrance Van Donk	20051-09-54
Step 6		Point of care specialist ERN Dr. Terrance Van Donk ERN Paed	Can	Terrance Van Donk Clever did you think to assy	y biomarkers oon tandem mass spectrometry?	29/01 15/20
		Healthcare provider Cancer Institute Lisbon		Terrance Van Donk @Kurt Crewe		2901 1521
		Record Lead Terrance Van Donk		Terrance Van Donk		31/01 12:50
		Thematic and Sub-thematic area		Terrance Van Donk Casandra Hawthorne		15/02 13:55
		Edit healthcare provider details		BIUS AM X, X ²]=][=≡≡≡][1] 5 C	
				Type a new message @ to mention s	comeone	Press Enter to add a new line
	The mes	ssage will display y	our name ir	n the following	format to indic	cate that you are
	acting o	n behalf of the clin	ician:			
		.0		Her	minia Appleton	
	Patient Records Add New Patient.	Terrance Van Donk	Discussion topic () Today, lafts delve little incoming programmed for self lative serions. Shering V	real and specific considerations for Glever Life, who is undergoing	Close the discussion .	
	Meetings	Hde personal data	Terrance Van Donk How is Clever Lilly don	g?@Terrance Van Donk	priver consist	
Sten 7		C Details Files Par >	Terrance Van Donk Clever did you think to	assy biomarkers our tandem mass spectrometry?	2007 10.20	
		Healthcare provider details	Terrance Van Donk		zavat sozat	
		Dr. Terrance Van Donk ERN PassCan Healthcare provider Cancer Institute Labos	Terrance Van Donk @Mihal DOBRESCU		prover reason	
		Record Lead Terrance Van Donk	Terrance Van Donk @Casandra Hawthor		100210.00	
		Thematic and Sub-thematic area	HA Herminia Appleton (o What is the timeline for	n behalf of Terrance Van Donk) Clever Lily's radiation therapy?	1902 1440	
		Edit healthcare provider details	BIUS AM X	x = E = E E Z B D C		

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.



	Proceed to the next page to generate	or validate a nickname, select a healthcare
	provider, lead, record assistant, thema	tic area, and sub thematic area.
		• *
	E CPMS 2.0	Christopha Keen 🕖 🖈 1459 🛤
	Hone Palan Record Add New Palan Enn * Enn GUARD-HEART	
Chan A	Meetings Healthcare provider * @	
Step 4	Supporting Docu	× 4
	Treatment country *	
	P Raby	
	Lead * Ctristophe Keen	x q
	Thematic Area * @	
	Thematics ~	
	Subthematic Area 🚳	
	Subthematics V	
	FE:1.36.0 BE: 1.36.2	
Sten 5	Review the overview page and confirm	the natient creation
5000 5	Review the overview page and commit	

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:

	og in to the CPMS 2.0 system using your credentials. You can make changes to the
Step 1	letails of the patient only if you are the lead for that patient. In case you are a
	participant, you can only view the details.
	Access the "Patient Records" page from the left-hand side menu.
	C OWS 220 C O O O O O O O O O O O O O O O O O
	Home Mome Anastasila Shapovall One Anastasila Shapovall onlaborate with clinicians across Europe to improve the diagnosis and treatment of rare diseases.
	Meetings View all
Sten 2	Supporting Docu Time Date Link Actions
Step 2	
	Active discussions IV View my patients only IVIII Control of an active discussion by reckname or ID
	Nickname ↓† ID ↓† Centre Deadline ↑ Actions
	Beata Jasper 942 P0000256 AOU - Bologne - • •
	Showing 1-1 of 1

	Navigate to the patient profile for which you want to edit extended details. You can do
Step 3	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.
	Under the "Details" tab click on the "Extended details" button.
Step 4	Image: Control dealer Image: Control dealer
Step 5	Inside the new page press on the "Edit information" button.

	Inside the edit page update all the needed fields	
	more the care page aparte all the needed helds.	
	← → C ↔ C ↔ C ↔ C ↔ C ↔ C ↔ C ↔ C ↔ C ↔ C	¢ 🖈 i
	E CPUS 2.0	0 🧳 🗶 💷
	Home Patient Details Patient D Solutioname Age	
	P2000511 Km Keth 9 3 Weeks - 4 Weeks Add New Patient Thematic and Sub-thematic area Record created Sex	
	 Meetings Rare Congenital malformations diagnosed and undiagnosed and rare intellectual disability ²⁵ September 2024 Female 	
	Supporting Boox Overview	~
Step 6	Summary Consultation Request Reason Other Genetic/Genomic Findings	
•	Diagnosis & Phenotype	~
	OrphaCode HPO Gene name	
	✓ Pease choose Q ✓ Pease choose Q ✓ Pease choose	٩
	Attachments	
	Imaging attachments + 2 Goto Ites	٩
	Other attachments + C Go to files	
	Other attachments	٩
		Cancel Save
	CPMS 2.0 - 1.42.4	
	After all the fields are updated click on the "Save" button	n.
	●●● () CMN520 +	
	C C	• • •
	E Constant C	o F o G
	Patient ID Nickname Age Patient Record Poto00511 Kim Keth 9 3 Weeks - 4 Weeks	
	Add New Patient Thematic and Sub-thematic area Record created Sex 25 Sectember 2024 Female	
	Materings Rare Congenital malformations diagnosed and undiagnosed and rare intellectual disability Second Research R	
	Diversion Overview	v
Step 7	Summary Consultation Request reason Construction Construc	
	Chapter () Chapter ()	
	Direkal/rela MPD & Gene sono	
	V Please choose Q V Please choose Q V Please choose	٩
	Attachments	×
	Imaging attachments + 2 Go to files	
	Different Andreast	٩
		٩
	CPM520-1424	Save

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.





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 t	the "Message (cm2 accented on set al (cm3 accented on set al)(cm3 accented on	Soval! Inclans across Europe to Time	Inat is located in mprove the diagnosis and treatment of rare dise Date No upcoming meeter View my patients only On Centre AOU - Bologna	the top menu. Austalia Sh Enve	Actions Actions Actions Actions Actions Actions Actions Actions Actions Actions Actions Actions Actions				
	CPMS 2.0 - 1.42.4	Showing 1-1 of 1								



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

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

Step 1	Log in to the CPMS 2.0 system using your credentials.									
	Click on 1	the "Messag + quite acceptance and not AS 2.0 Welcome Anastasiia Shag Get ready to collaborate with of Next meeting Title	es" icon " poval! linicians across Europe to	that is in the top improve the diagnosis and treatment of rare dise Date	ases.	etasia Shapovat				
Step 2	CPMS 2.0 - 1.42.4	Active discussions Nickname 41 Besta Jasper 042 Hens per page: 10 v Sbowing 1-1 of 1	10 41 P0000256	No upcoming meetin View my patients only Centre AOU - Bologna	ge! Q Search for an active discussion Deadline -	tby nickneme or ID ↑ Actions • • • H < (1) ⇒ H				




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.

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:



		our message ins	ide the group 1:1 chat.
	Home	Patient-related information MIIST	FDN Grund Mart Anonursements
	 Patient Record Add New Patient 	NOT be posted here	There are no messages yet
	🖀 Meetings	Recent Conversations	Patient-related information MUST NOT be posted here
	Supporting Docu	Direct Messages \Xi 🛨	
Step 4		Adam TORBICKI	
		Adelina COJOCARU Adis Automation Testuser	
		Adriana Cantoran	
		Alain VERLOES	
		Alberto PEREIRA Groups	
		ERN Guard-Heart Announcements	
	CPMS 2.0 - 1.42.4	$ \rightarrow $	

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 crede	entials.	
	Click on t Click on t CPNS20 ←→ c 0 E CPN Mome Patent Record	he "Message + cms2 acceptance arm ret su 1S 2.0 Welcome Anastasila Sha Get ready to collaborate with o	es" icon th	nat is located in t	the top menu.	povat
	Add New Patient Meetings	Next meeting				View all
Step 2	Supporting Docu	Title Active discussions @	Time	Date No upcoming meetin View my patients only	Link gsl Q. Search for an active discussion by nickno	me or 10
		Nickname 41 Ress per page: 10 v Showing 1-1 of 1	10 at P0000256	Centre AOU - Bologna	Deadline 个	Actions
	CPMS 2.0 - 1.42.4					





		ur message by p + Como accordance and and MS 2.0	ressing on the arrow.
	Patient Record	Patient-related information MUST NOT be posted here	ERN Guard-Heart Announcements
	Add New Patient	Views	No more messages to load
	Streetings	S Recent Conversations	Patient-related information MUST NOT be posted here
	Supporting Docu	Direct Messages \Xi 🛨	
Cham 7		Adam TORBICKI	September 24, 2024 7137 M 🏠 🖥 🖉 🖉
Step /		Adelina COJOCARU	Hi everyone! Nice to meet you all!
		Adis Automation Testuser	
		Adriana Cantoran	
		Alain VERLOES	
		Alberto PEREIRA	
		Groups	
		ERN Guard-Heart Announcements	
			He everyone! Nice to meet you all
	CPMS 2.0 - 1.42.4		

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

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

Step 1	Log in to) the CPMS 2	2.0 syster	m using your c	redentials.		
Step 2	Click on CHS24	the "Messag (cm2 abordence or action AS 2.0 Welcome Anastasila Shape Get ready to collaborate with cal Next meeting Title Active discussions @ Nickmame 47 @ Boota Jappe 942 Imms per page: 10 ~ Bhoweng 1-2 of 3	Ies" icon oval! Incarts across Europe to in Time	that is located	in the top ment Accesses Link ngsl Q Search for an active discussion by nick Deadline ↑	L).	
	CPMS 2.0 - 1.42.4	Recent a Japper SH2 Norms per page: 10 -> Showing 1-5 of 1	110000256	AGU - toogna		κ ∢⊙> ×	



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

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





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:



≡ 🔘 CPI	IS 2.0 DEV -	Liviu Andrei 🕕 🧿 🧳
🏠 Home	Search for a record > Lena Mart 301 > Lena Mart 301 Pedigree	
Patient Record	Lena Mart 301 Pedigree	
Add New Patient		
🖀 Meetings		
Supporting Docu	Lena Mari 301 21. Uktiown	
CPMS 2.0 - 1.49.0	Edit person Manage relationships Delete person Add partner	er Add child Add parent Add sibling Add pregnancy

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

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



	2. <u>Gender</u> : 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. <u>Bio</u> logical 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. <u>Age</u> : 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. <u>Adopted</u> : If the person was adopted, the information can be stored by
	Checking the Adopted checkbox.
	6. <u>Deceased</u> : If the person is deceased, the information can be stored by
	the Age at death and will not be recalculated during time
	Home Search for a record > Lena Mart 301 ×
	E Patient Record Lena Mart 301 F
	Supporting Docu
	Biological sex
	AMAB (Assigned male at birth) AFAB (Assigned female at birth) UAB (Unassigned at birth) Unknown Q
	✓ 21 ☐ Adopted ☐ Deceased
	Add disease
	Edit person Manage resultance point Add pickets Add pi
	For each person in a diagram, several diseases can be added, by clicking on the
Step 3	Add disease button.
	Clicking this button triggers the display of a new section within the form.
	1 Name: select from the list or type in a name for the disease
	2 Affected indicator: select ves or no depending if the person is affected
Step 4	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.



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
	<u>OtherDisease</u> 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.

	E 💽 CPMS 2.0 🔍 🖉
	None Back for a record > Premera Dan 35 Pergen
	Freeman Stan 305 Pedigree
	With Weing the Second Sec
	• Restrict Data:
	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. <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. <u>Gender</u>: the selection of one of the displayed values is mandatory. 3. <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).

	 Adopted: if the person was adopted, the information can be stored by checking the Adopted checkbox. 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.
	Add parent for Lena Mart 301
	Nickname
	 ○ Unknown ○ Undifferentiated ○ Male ○ Female Age Age in years ○ Adopted ○ Deceased
	Cancel Save
	Save the information for the parent by clicking the Save button.
Step 3	 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.
	 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.

	EEN CPMS 2.0 CPMS 2.0 Liviu/Medil 🖳 🔮 👫	• (
	Home Search for a record Lena Mart 301 Pedgree > Primet Record Lena Mart 301 Pedgree	
	Add New Patient Logend	
	weinp weinp supporting Docu.	
		B
		Bi .
	pro- pro-	ି ବ୍
	Leven More 301 27 20 more 11 29 more 11	Q
		د م
		8
	Edit person Manupe relationships Dakke person Add partner Add pattern Add patt	
	CH822-1300	
	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	r
	persons within a generation (starting with the lower value to the left). It	F
	can be changed to use a custom value by checking the box "Custom	
	name" Any also sumaria character is accounted incidently checking the box "Custom	
	name . Any alpa-numeric character is accepted, no double spaces, no	
	null values.	
	2. <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)
Step 2	will be drawn as a double line.	
	3. <u>Gender</u> : the selection of one of the displayed values is mandatory.	
	4. Age: the field is not mandatory, but if set, it is automatically recomputed	d
	during time (by increasing the saved age with difference in years	
	between the today date and the lastsayed date of the pedigree	
	die dre es)	
	diagram).	
	5. <u>Adopted</u> : if the person was adopted, the information can be stored by	
	checking the Adopted checkbox.	
	6. <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.	

	Add partner for Lena Mart 301 ×
	Nickname
	Cancel
	Save the information for the partner by clicking the Save button.
	The following updates are done in the diagram:
	1. The partner is displayed taking into account the gender: as a square if it
Step 3	is a male, as a round if it is a female, diamond for non-binary/gender diverse.
	2. 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 .
Step 4	For adding other details for the partner (such as diseases), click on the person and on the Edit person button.

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

Step 1	Click on a person from the diagram and click on Add child 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. <u>Gender</u>: the selection of one of the displayed values is mandatory. 3. <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 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. Add child for 1.2 ×
	Custom name @
	O Unknown O Undifferentiated O Male O Female
	Age
	Age in years
	Cancel Save
	Save the information for the child by clicking the Save button.
	The following undates are done in the diagram:
	1. The child is displayed taking into account the gender: as a square if it is
Step 3	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.
	 The name is displayed below the symbol. The age is displayed below the name
	4. The age is displayed below the name.
Step 4	For adding other details for the child (such as diseases), click on the person and on the Edit person button.

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

	IMPORTANT: you can only add siblings to a person if the person has at least
	one parent
	Click on a person from the diagram and click on Add Sibling button.
Step 1	
	Fill in the person's details based on the rules below:
	1 Nickname: the person's nickname is autogenerated using Roman
Step 2	
	numerals for generations (starting with the older generation at the top
	and ending with the most recent at the bottom) and Arabic numbers for
	5

 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 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). <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. <u>Twin</u>: check the box if the sibling you are adding is the twin of the person. <u>Fraternal status</u>: if the twin box is checked, the fraternal status of the twin must be set by choosing one of the available options.
 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. <u>Gender</u>: the selection of one of the displayed values is mandatory. 3. <u>Age</u>: 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. <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. 6. <u>Twin</u>: check the box if the sibling you are adding is the twin of the person. 7. <u>Fraternal status</u>: if the twin box is checked, the fraternal status of the twin must be set by choosing one of the available options.
 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 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). <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. <u>Twin</u>: check the box if the sibling you are adding is the twin of the person. <u>Fraternal status</u>: if the twin box is checked, the fraternal status of the twin must be set by choosing one of the available options.
 Sender: the selection of one of the displayed values is mandatory. 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). Adopted: if the person was adopted, the information can be stored by checking the Adopted checkbox. In this case, the age field will store the Age at death and will not be recalculated during time. Twin: check the box if the sibling you are adding is the twin of the person. Fraternal status: if the twin box is checked, the fraternal status of the twin must be set by choosing one of the available options.
 2. <u>Gender</u>: the selection of one of the displayed values is mandatory. 3. <u>Age</u>: 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. <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. 6. <u>Twin</u>: check the box if the sibling you are adding is the twin of the person. 7. <u>Fraternal status</u>: if the twin box is checked, the fraternal status of the twin must be set by choosing one of the available options.
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Age in years Adopted Deceased
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Fraternal Status *
O Monozygotic O Dizygotic O Unknown
Cancel Save
Save the information for the sibling by clicking the Save button
Save the mornation of the sisting by cloking the save sation.
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 formale, diamond for non-binary/gonder
Step 3 Is a male, as a round in it is a female, diamond for non-binary/gender
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: <u>Gender</u>: the selection of one of the displayed values is mandatory. <u>Estimated Delivery Date</u>: pick up from the calendar the estimated delivery date, in case it is known. <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. <u>Reason for termination</u>: the selection of one of the displayed values is possible but not mandatory. <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: The pregnancy is displayed as a triangle with a P in it. If the estimated delivery date is set, the EDD + the date is displayed below the symbol. 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

Stop 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
Step 1	Manage relationship button. A form is displayed to manage relationships of the selected person.

	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
Step 2	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.
	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).
	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
	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.
Step 3	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
	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
	once more).
	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
Step 4	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 butten after each sections before saving all you work or you can click the
	to edit other relationships you need to press the Manage relationship button
	once more).
	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
Step 5	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



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



12. Import a diagram from a valid json



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 (7 th icon).

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14. Increase/reduce the visibility over the diagram





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.

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Home > Advanced	search						
Advanced	lsearch						
You can search	by multiple criteria, using '+' as del	limiter					
Experts Patie	nts Files Meetings						
39 records found							
Nickname 个		ID	Thematic Area	ERN	Healthcare provider	Lead	Status
1 22-Apr-2025 011	303 ERN008 Andrea Rolly 975	P0000775	Mesothelioma (MSTO)	ERN-LUNG	University Hospital Leuven	alexandru alexandru	No Discussion
17 19-Mar-2025 0 Lefebvre 42	1701 ERN001 Stephanie	P0000544	Clinical and radiological diagnosis	BOND	Consortium: Hospices Civils de Lyon	Michele Foucart	Under Discussion
17 19-Mar-2025 0-	2003 ERN001 Mae Vangogh 699	P0000596	Clinical and radiological diagnosis	BOND	Consortium: Hospices Civils de Lyon	Michele Foucart	Under Discussion
2 22-Apr-2025 011	304 ERN008 Tony Mercury 651	P0000776	Mesothelioma (MSTO)	ERN-LUNG	University Hospital Leuven	alexandru alexandru	No Discussion
26 19-Mar-2025 0- 448	2003 ERN009 Eliasson Ricardo	P0000605	Cutaneous Mosaic Disorders - Nevi & Nevoid Skin Disorders and Complex Vascular Malformations and vascular Turnours	ERN-SKIN	ASL Tuscan Centre	Test LoadTwoSix	Under Discussion
3 22-Apr-2025 011	304 ERN008 Galega Skylar 478	P0000777	Mesothelioma (MSTO)	ERN-LUNG	University Hospital Leuven	alexandru alexandru	No Discussion
32 19-Mar-2025 0- 378	2003 ERN003 Copland Haydn	P0000602	Disorders of calcium and phosphate homeostasis	Endo-ERN	Leiden University Medical Center	Liviu Andrei	Under Discussion
33 19-Mar-2025 0	2003 ERN003 Ignite Vex 257	P0000604	Disorders of calcium and phosphate homeostasis	Endo-ERN	Assistance Publique-Hôpitaux de Paris, Hôpital Pitié- Salpétrière	Test LoadThreeThree	Under Discussion
34 19-Mar-2025 0-	2003 ERN016 Thijs Sassy 221	P0000603	Special electrophysiology conditions in children	GUARD- HEART	Stichting Amsterdam UMC	Test LoadThirteen	Under Discussion
35 19-Mar-2025 0	2003 ERN011 Pedro Mulder 833	P0000601	Bone Marrow Failure	EuroBloodNet	Aghia Sophia" Children"s Hospital	sk hp	Under Discussion
Items per page: 10	-					ы. н	1 2 3 4

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.

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Q Advanced sea	records found							
	Nickname 个	ID	Thematic Area	ERN	Healthcare provider	Lead	Status	
	Fahle Finden 299	P0000678	Chronic lung allograft dysfunction (CLAD)	ERN-LUNG	Leiden University Medical Center	Gabriela Andrei	No Discussion	>
	Gábor Foxy 732	P0000849	Genetic endocrine tumour syndromes	Endo-ERN	Leiden University Medical Center	Gabriela Andrei	No Discussion	>
	Tucker Ferrari 936	P0000683	Hypothalamic and Pituitary, Growth (and genetic obesity syndromes)	Endo-ERN	Leiden University Medical Center	Gabriela Andrei	Under Discussion	>
	Vivi Panda 979	P0000286	Growth (and genetic obesity syndromes)	Endo-ERN	Leiden University Medical Center	Gabriela Andrei	Under Discussion	>
	Items per page 10 v Stowing 1-4 of 4						и	4 1 Þ H

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

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

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	Name 个	Email	EU login username	Country	Timezone	Language	ERN	
	Gabriela Andrei	gabi@mail.com	n7446067	Netherlands	Europe/Amsterdam	English	Endo-ERN	>
	Rema per paget. 10 v Showing 1-1 of 1						и	4 1 ▶ ₩

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.

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	Healthcare provider / hospital Leiden University Medical Center / acasa la el Clinical Focus		lession ogist	Cares for Adult Pediatric		ne		
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	Healthcare provider / hospital Leiden University Medical Center / acasa la el Clinical Focus Items per page: 10 -> Stowing 1-1 of 1	Ansistants Forgotten Forgotten	н ∢ т ⊳ и
		Ciose	

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

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	Fahle Finden 299	P0000678	Chronic lung allograft dysfunction (CLAD)	ERN-LUNG	Leiden University Medical Center	Gabriela Andrei	No Discussion	>	
	Gábor Foxy 732	P0000849	Genetic endocrine tumour syndromes	Endo-ERN	Leiden University Medical Center	Gabriela Andrei	No Discussion	>	
	Tucker Ferrari 936	P0000683	Hypothalamic and Pituitary, Growth (and genetic obesity syndromes)	Endo-ERN	Leiden University Medical Center	Gabriela Andrei	Under Discussion	>	
	Vivi Panda 979	P0000286	Growth (and genetic obesity syndromes)	Endo-ERN	Leiden University Medical Center	Gabriela Andrei	Under Discussion	>	
	Items per page: 10 V Showing 1-4 of 4						н 4	1 🕨 🕅	

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.

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	Thematic Area			Subthematic Area				
	Chronic lung allograft dysf	unction (CLAD)		bronchiolitis obliterans syndrome, etc.				
	Last updated		Record created		Sex			
	07/04/2025		28/03/2025		Female			
	Gábor Foxy 732	P0000849	Genetic endocrine tumour syndromes	Endo-ERN	Leiden University Medical Center	Gabriela Andrei	No Discussion	>
	Tucker Ferrari 936	P0000683	Hypothalamic and Pituitary, Growth (and genetic obesity syndromes)	Endo-ERN	Leiden University Medical Center	Gabriela Andrei	Under Discussion	>
	Vivi Panda 979	P0000286	Growth (and genetic obesity syndromes)	Endo-ERN	Leiden University Medical Center	Gabriela Andrei	Under Discussion	>
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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

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	File name 🔥	Category	Upload date	Investigation date	Description					
	fisier1.pdf	Other	05/05/2025							
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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

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	Title 🔨	Time	Date	Status	Patients to be discussed			
	demo 4.1 meeting	18:15-18:30	17/03/2025	Completed			>	
	Items per page: 50 v Showing 1-1 of 1						4 . ◀ [1 🕨 🖬

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.

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	Title 个	Time	Date	Status	Patients to be discussed			
	demo 4.1 meeting	18:15-18:30	17/03/2025	Completed			$\overline{\mathbf{v}}$	
	Agenda			Participants				
	no agenda			Michele Foucart (INVITED), Liviu Andre	i (host) (ACCEPTED), Cristi Andrei (INVITED), Gabriela And	rei (INVITED)		
	Berns per page: 50 V Showing 1-1 of 1						н	■ 1 ► H

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.