



CPMS 2.0 User Guide



<https://cpms2.ern-net.eu/>



Before using the CPMS 2.0, please remember that the usage must be approved by your hospital's Data Protection Officer.

It is your responsibility to ensure approval by your DPO!!!

To access to the CPMS 2.0, the prerequisite is to create an EU Login and to request your access to the platform.

If you have not created an EU login account yet , please go to <https://webgate.ec.europa.eu/cas/eim/external/register.cgi> and follow the instructions given in the dedicated tutorial.



Login to the CPMS 2.0



Go to <https://cpms2.ern-net.eu/> and click on **“Login”**.



Enter your credentials for EU Login and choose and verification method

CPMS2 requires you to authenticate

Sign in to continue

Welcome

(External)

[Sign in with a different email address?](#)

Password

••••••••••

[Lost your password?](#)

Choose your verification method

	EU Login Mobile App PIN Code Use your registered EU Login Mobile app to verify your identity.	▼
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[Sign in](#)

For your information : **EU Login will phase out SMS as an authentication option in the next month**, so please make sure you have configured at least one other supported methods (PIN Code or QR code with the EU Login application).

If this the first time you login to the CPMS 2.0 but if you already had an account on the older version of the CPMS, please go directly to the [p.7](#) of this tutorial.

If you have already login to the CPMS 2.0, please go directly to [p.8](#) of this tutorial.



Once the Login process is completed, you are directed to the sign-up page.

If this the first time you have logged on to the CPMS 2,0, you will need to complete a number of questions before accessing the new CPMS.

Public Page > Sign Up

Sign Up

Please complete these questions to request access to New CPMS

Page 1 of 3

Which category best describes your role?

Please select

Clinician Assistant

Are you a member of ERN?

Please select

Yes No

Professional Information

Please select

Healthcare provider / hospital *

ERN

<input type="checkbox"/> RARE-LIVER	<input type="checkbox"/> Endo-ERN	<input type="checkbox"/> ReCONNET
<input type="checkbox"/> VASCERN	<input type="checkbox"/> RITA	<input type="checkbox"/> ERN-SKIN
<input type="checkbox"/> eUROGEN	<input type="checkbox"/> GENTURIS	<input type="checkbox"/> PaedCAN
<input type="checkbox"/> EuroBloodNet	<input checked="" type="checkbox"/> ERN-EYE	<input type="checkbox"/> EURO-NMD
<input type="checkbox"/> ERKNet	<input type="checkbox"/> ERN-LUNG	<input type="checkbox"/> ERN-RND
<input type="checkbox"/> GUARD-HEART	<input type="checkbox"/> CRANIO	<input type="checkbox"/> EpiCARE
<input type="checkbox"/> BOND	<input type="checkbox"/> EURACAN	<input type="checkbox"/> ERNICA
<input type="checkbox"/> ITHACA	<input type="checkbox"/> TRANSPLANTCHILD	<input type="checkbox"/> MetabERN

- Select your role as « **Clinician** » or « **Assistant** » and proceed by specifying your ERN and hospital.

Then, click on the « **Next** » button.



Public Page > Sign Up

Sign Up

Please complete these questions to request access to New CPMS.

Page 2 of 3
Clinical Focus
Please enter some information about yourself and your areas of expertise.

Cares for *

Adult Pediatric
Please select

Profession *

Please select

Please select

Thematic Area *

Thematics

Please select a thematic area, maximum 3 values

Subthematic Area

Subthematics

In your own words, what is your specific clinical or research focus, for which you feel competent to give expert advice?

Back **Next >**

- Describe your clinical focus: profession, thematic and sub-thematic areas, and an optional free text input.

Click on the « **Next** » button .

- Review the information provided.

Click on the « **Submit access request** » button .

Page 3 of 3
Overview
Please review your information before submitting

1 Information from EU login	Name *
	Email *
	EU username *
2 Professional Information	Role *
	ERN *
	Healthcare provider / hospital *
3 Clinical Focus	Cares for *
	Profession *
	Thematic Area *
	Subthematic Area
	Focus area

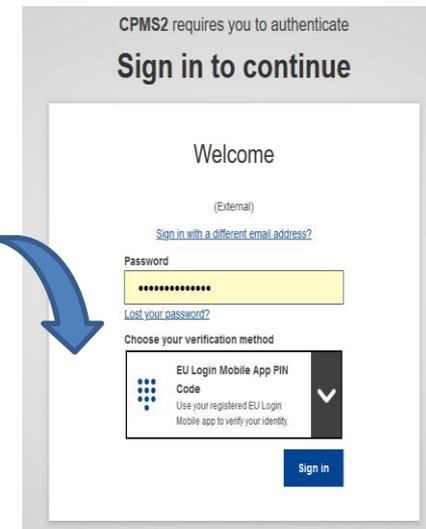
Submit access request



Your request is submitted to your ERN and you're logged out automatically.

You'll be notified twice by email when your request is submitted and when your request is approved by the ERN .

After having been notified that your request for access has been approved, you can use the system, please go back to <https://cpms2.ern-net.eu/> , click on the  button and sign in.





Upon your first login you must read and agree with the privacy policy by ticking the consent checkboxes.

Consent Required for CPMS 2.0 Access
Please select the checkboxes in order to access CPMS 2.0

I have read the privacy policy of the CPMS 2.0 platform. I consent that my profile data is stored in the system and can be used to generate reports on my activity on the platform. I am aware that if I participate in clinical discussions, my name and affiliation will be visible in the outcome reports. I understand that the medical liability is always on the treating doctors and an outcome report expresses only the opinion of the experts participating in the discussion. I know that I can withdraw my consent at any time by editing my user profile.
This field is required

I consent that, if I participate in a clinical discussion of a patient from a country outside the EU, the outcome report (with my name and affiliation on it) may be downloaded by a clinician of that country.
This field is required

The consent is a one-time action. After giving consent, you will be directed to your home page.

You have the right to withdraw the consent at any moment by going to your user profile.

By clicking on the « **Continue** » button, you will be redirected to the main page of the CPMS 2.0 .



This is the main page of the CPMS 2.0 :

CPMS 2.0

ERN EYE

Home

Patient Records

Add New Patient

Meetings

Supporting Docu...

Welcome

Get ready to collaborate with clinicians across Europe to improve the diagnosis and treatment of rare diseases.

Next meeting [View all](#)

Title	Time	Date	Link	Actions
No upcoming meetings!				

Active discussions ? View my patients only

Nickname ↕	ID ↕	Centre	Deadline ↑	Actions
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Enrol a patient



To enrol a patient click on the “Add New Patient” button in the left hand-side menu.

CPMS 2.0

ERN EYE

Home > Add new patient

Add new patient
Create a record for a patient who doesn't yet exist in the system

Choose an option... 

Page 1 of 3

Consent for care
Before you can add a patient to the system you must gain their consent. To gain consent your patient must fill out a [consent form](#).

Consent given *
 Yes No

Consent for education purposes
 Yes No

Consent for inclusion in registries
 Yes No

Identifying data

First Name *

Last Name *

Sex *

Date of birth *

Nationality *

Next >

Be careful, if your are mentioned as an assistant for clinician(s), please select here who you want to act on behalf of.





Fill in here the patient's identifying data (Name, Gender, Date of birth and Nationality).

Before any enrolment, the patient must have signed the dedicated CPMS consent form!!!

When done, click on the “**Next**” button

The screenshot shows the 'Add new patient' form in the CPMS 2.0 system. The form is titled 'Add new patient' and includes a sub-header 'Create a record for a patient who doesn't yet exist in the system'. The form is divided into several sections:

- Page 1 of 3**
- Consent for care**: A message states 'Before you can add a patient to the system you must gain their consent. To gain consent your patient must fill out a [consent form](#).' Below this are two radio buttons: 'Yes' (unselected) and 'No' (selected).
- Consent for education purposes**: Two radio buttons: 'Yes' (unselected) and 'No' (selected).
- Consent for inclusion in registries**: Two radio buttons: 'Yes' (unselected) and 'No' (selected).
- Identifying data**:
 - First Name ***: A text input field with a person icon and the placeholder 'Enter first name'.
 - Last Name ***: A text input field with a person icon and the placeholder 'Enter last name'.
 - Sex ***: A dropdown menu with a person icon and the placeholder 'Please choose'.
 - Date of birth ***: A date input field with a calendar icon and the placeholder 'dd/mm/yyyy'.
 - Nationality ***: A dropdown menu with a globe icon and the placeholder 'Please choose'.
- Next >**: A blue button with a right-pointing arrow, highlighted with a red box.



Then select a point of care specialist, healthcare provider, record lead, record assistant, thematic area, and sub thematic area. When done, click on the **“Next”** button.

Point of care specialist * ?



Name of the treating physician

ERN *

Healthcare provider * ?

Treatment country *

Name of the doctor who is responsible for the patient in the system

Record Lead * ?



Thematic Area * ?

Anterior Segment Rare Eye Diseases (x)

Back

Next >



You will have to generate and validate a nickname.

Please here, use the name of your centre followed by the inclusion number of your patient, e.g. for the 1st patient for the CARGO centre, the name should be CARGO01.

Change the Nickname accordingly and click on **“Validate”**.

Home

Patient Records

+ Add New Patient

Meetings

Supporting Docu...

Add new patient

Create a record for a patient who doesn't yet exist in the system

Page 2 of 3

System information

Nickname * ?

The nickname must be unique

CARGO02

Validate Generate nickname

This nickname is valid

Name of your centre and inclusion number of your patient



You will be invited to validate an overview page of the information about your enrolled patient.

If you want to modify some information click on “**Edit details**”, if all information is fine, click on “**Add patient**”.

Consent given *

Yes

addPatientThird.dateOfConsentForCare *

27/03/2024

Consent for education purposes *

No

addPatientThird.dateOfConsentForEducation *

-

Consent for inclusion in registries *

No

Edit details

Add patient >



Add a file to your patient's record



The page is split in two sections, one for the **patient's record (left side)** and one for the **discussion (right side)**.

Here you can reveal or hide the identity of your patient

The screenshot displays the CPMS 2.0 interface. The top navigation bar includes the CPMS 2.0 logo and the ERN EYE logo. The main content area is split into two sections. The left section, titled 'Patient details', shows information for patient 'CARGO02' (P0000237). A red arrow points to a 'Hide personal data' toggle switch, which is currently turned off. A green box labeled 'Patient record' highlights this area. The right section, titled 'Discussion topic', shows 'Currently there is no open discussion.' and an 'Open discussion' button. A green box labeled 'Discussion' highlights this area.

Patient details	
Sex	Age
Male	1 Weeks-2 Weeks
Record created	
27 March 2024	
Thematic and Sub-Thematic area	
> Anterior Segment Rare Eye Diseases	



In the patient record section, go to the “Files” tab to upload relevant documentation about your patient.

The screenshot shows the CPMS 2.0 interface. At the top, there is a navigation bar with the CPMS 2.0 logo and user information. Below the navigation bar, the patient record for 'CARGO02' is displayed. The 'Files' tab is selected and highlighted with a red box. Below the tabs, there is a table with columns for 'More', 'File category', 'Date', and 'Actions'. The 'Upload' button in the table is highlighted with a red box. A blue arrow points from this button to the 'Upload File' dialog box. The dialog box contains fields for 'File category', 'Investigation date', and 'Description'. At the bottom of the dialog, there is a checkbox and a confirmation message: 'By ticking this checkbox, you confirm that you have checked and manually removed all identifiable personal data from selected file(s), including comments & annotations.' The 'Upload' button in the dialog is also highlighted with a red box.

To upload a document, click on the « **Upload** » button , select your file (you can do a drag and drop), then you will have to describe and date the file uploaded and **to confirm that you have removed all identifiable personal data** . Once done, click on the « **Upload** » button.



Once done, you can view the file uploaded by clicking on the  icon or by clicking on the three points, you can also choose to download, edit or delete the file. You can also generate a link for your file.

Click here to view the document uploaded

More	File category	Date	Actions
>	pdf Reports	05/03/2024	 

Items per page: 25 ▾
Showing 1-1 of 1

Collapse all

Upload

- Download file
- Edit file details
- Copy file link
- Delete file



Invite members to discuss your case



Go to the « **Participants** » tab to allow other members to view your patient information and to discuss the case.

Add a participant

Search
Search by group

ERN
ERN EYE

Name
Search by name

Thematic Area
Select / search by the

6 results found
Selected criteria ERN EYE

Name	ERN	Centre	Profession
<input checked="" type="checkbox"/> Monika	ERN EYE	Consortium: Hôpitaux Universitaires de Strasbourg	Ophthalmologist
<input type="checkbox"/> Dorothee	ERN EYE	Consortium: Hôpitaux Universitaires de Strast...	
<input type="checkbox"/> Dorothee	ERN EYE	Consortium: Hôpitaux Universitaires de Strasbourg	Pharmacologist
		Assistance Publique-Hôpitaux	

Search Add participant

Here you can search members by ERN, Name, Thematic area, Centre, Profession or even by group if it was set up by your ERN administrator (e.g WG1...).

Click on « **Search** » button after having chosen your research parameter.

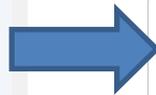
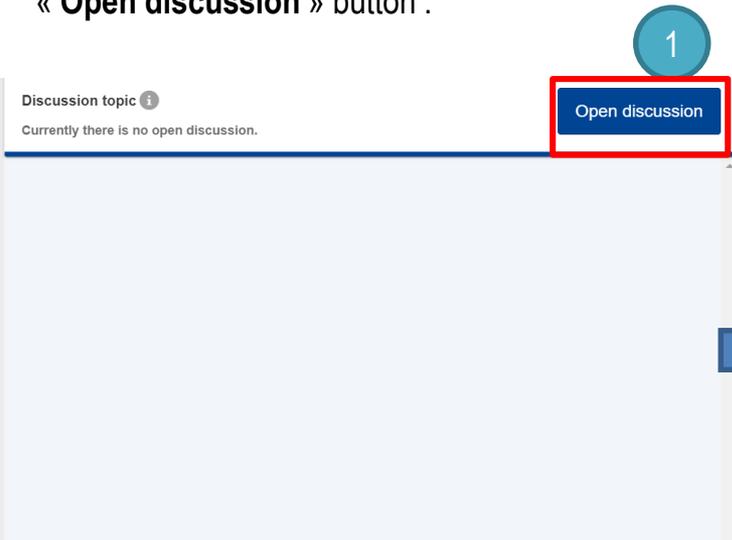
A list of members corresponding to your research will appear, tick on the checkbox to invite members to discuss your case and finally, click on the « **Add participant** » button.



Discuss your case



Once participants are selected, open the discussion by going in the « **Discussion** » section and clicking on the « **Open discussion** » button.



Open a discussion ×

Write discussion topic *

Below you can state discussion purpose, along with details about the patient and their medical history

Write your comment here. This can be a sentence or a paragraph.

Urgency *

Is this discussion urgent?

Not urgent Urgent

Specify urgency

If urgent, specify a soft deadline here

dd/mm/yyyy

Cancel **Confirm**

Fill in the discussion topic and precise if your case is urgent or not.

Click on « **Confirm** » to open the discussion.



Discussion topic ⓘ

test

View more ▾

Close the discussion

Close the discussion

Conclusion comment *

The discussion is closed

Cancel Confirm

1 2 3 4

Now you can discuss your case with the other participants , you can mention one particular member by using *@nameofthemember*.

When you feel you have enough information to reach a conclusion, close the discussion by clicking on the “**Close the discussion**” button.

Write a conclusion and close the discussion by clicking on the “**Confirm**” button.



Search for a record > CARGO02

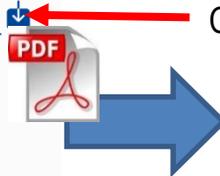
CARGO02 Hide personal data

P0000237 Under Discussion

Details | Files | Participants | **History**

- Discussion opened**
28th mars 2024
test
- Discussion closed**
28th mars 2024
TEST
- Discussion opened**
28th mars 2024
TEST
- Created on**
27th mars 2024

[View discussion](#)



Click here to download the Outcome



European Reference Networks

Patient P0000237
ERN EYE

Thematic area: Anterior Segment
Rare Eye Diseases
Sub-thematic area: Rare acquired eye disease

Discussion closed on 28/03/2024

Experts involved

Record Lead: Francesco ROTOLO of Consortium: Experts having contributed:
Hôpitaux Universitaires de Strasbourg/ERN EYE unit (Ophthalmologist)

Assistants:

To whom it may concern,

Patient P0000237 was enrolled on March 27, 2024 for assessment by the experts of the European Reference Network on eye diseases. After discussing the patient case, the group of experts reached the following conclusion:

This is the outcome of all the discussions that were held on the above mentioned patient.



Schedule Meetings



To schedule a meeting, go the left-hand side menu and click on "Meetings".
Then, click on the "Schedule Meeting" button.

Fill in all information about the meeting (title, time, date, agenda and mention the cases you want to discuss during the session).

If needed you can add recurring meeting by clicking on the "Add recurrence" button.

Tick the checkbox confirming that you are aware about data protection responsibilities and click on the "Save" button.



Join Meetings



Now your meeting is visible on the « **Upcoming Meetings** » tab.

To join the meeting, click on the « **Join** » button.

Home > Meetings

Meetings

[Schedule meeting](#)

Upcoming Completed Declined

From: 18/12/2024 To: dd/mm/yyyy [Apply](#) [Reset](#)

1 upcoming meetings

Title ↓↑	Time	Date ↑	Link	Status ↓↑	Actions
TEST	12:00 - 12:15 15 min	18 Dec 2024	https://cpms2-accept...	Accepted	Join View Edit Cancel Help Close

Items per page: 10
Showing 1-1 of 1

Cancel the meeting if you scheduled it

Answer to an invitation

You can also forward the meeting to another user by clicking here

You can also share a link for this meeting .
You can copy the link by clicking on the  button on the « **Link** » column.



You will be invited to choose your audio preferences and to configure your audio settings :



How would you like to join the audio?



Microphone



Listen only

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) ▾

Speaker source

Default - MacBook Pro Speakers (Built-in) ▾

 Stop audio feedback

Your audio stream volume



Back

Join audio

If this the first time you are connecting to a meeting with your microphone and camera, you may allow you browser to use your microphone and camera.



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

- Microphone muted
- Microphone un-muted
- Camera off
- Camera on
- Screen share is off
- Screen share is on
- Hand not raised
- Hand raised



Others



Patient Record



By going to the « **Patients Records** » section, you can have the list of all for whom you are taking part in a discussion. You can only display the records for whom you are mentioned as « *Lead* » by clicking on « **View my patients only** » .

Home

Patient Records

Add New Patient

Meetings

Supporting Docu...

Search for a patient record

Search for a patient using their Nickname or ID

View my patients only

2 records found

Nickname ↑	ID ↓↑	Thematic Area	HCP Name	Record Lead	Status	Last updated ↓↑	Actions
CARGO02	P0000237	Anterior Segmen...	Consortium: Hôpitaux Universitaires de Strasbourg	Francesco ROTOLO	Under Discussion	5 hours ago	
CARGO221	P0000233	Anterior Segmen...	Consortium: Hôpitaux Universitaires de Strasbourg	Francesco ROTOLO	× Discussed	16 hours ago	

Items per page: 10 ▾
Showing 1–2 of 2

Click on the name of the record or on the button to access to the corresponding record .

Search for a record > CARGO221

CARGO221 Hide personal data

P0000233 Discussed

Details Files Participants History

Patient Details

Sex Male Age 9 Months - 10 Months

Record created 25 March 2024

Thematic and Sub-thematic area
Anterior Segment Rare Eye Diseases(inactive)

Export patient data Edit patient details

Discussion topic

Currently there is no open discussion.

Open discussion



Supporting documents



By going to the « **Supporting document** » section, you can access useful documents and videos which may help you using the CPMS 2.0, as template for consent, manuals, tutorials, etc...

Note that the consent form needs to be adapted by your institution!!!

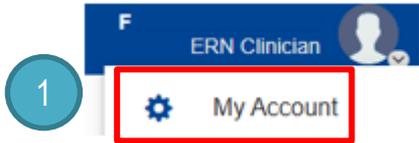
The screenshot shows a web interface with a left-hand navigation menu and a main content area. The navigation menu includes: Home, Patient Record (highlighted with a red box), Add New Patient, Meetings, and Supporting Doc... The main content area displays the breadcrumb 'Home > Supporting documents' and the title 'Supporting documents'. Below the title, it states 'Info and templates needed for the system'. There are three sections: 'Consent templates (to be adapted by the hospitals)' with 'No files found for this section.', 'Supporting documents' with 'No files found for this section.', and 'Files' which lists several PDF documents: 'CPMS 2.0 Patient consent kit for EU HCPs.zip', 'CPMS 2.0 Privacy Statement V1.1.pdf', 'CPMS2.0_Care_ReferenceManual_v5.pdf', 'CPMS2.0_Care_ShortGuide_v4.pdf', 'CPMS2.0_for_Android_testing_v1.pdf', 'CPMS2.0_for_iOS_testing_v1.pdf', and 'Frequently Asked Questions V1.2.pdf'. A 'Videos' section is also present but empty.



My Account



By going to the  icon, on the top right of the main page, you can access to the you account details by clicking on « **My account** »



In the « **Personal Information** » tab, you can edit your profile by clicking on the « **Edit Information** » button.

You can namely edit your secondary email, profession and « **Clinical Focus** » (this item is detailed in the next slide).
If you need to change your role please email us at francesco.rotolo@chru-strasbourg.fr or isabella.vacchi@chru-strasbourg.fr.

If you want to modify others informations such as Last name, email or phone number, please visit the EU login account page.

My Account

Personal Information | Notification Settings | Assistant

Personal Information ⓘ

Last Name	First Name
<input type="text" value="R"/>	<input type="text" value="F"/>
Email	Secondary email
<input type="text" value="@chru-strasbourg.fr"/>	<input type="text"/>
Phone number	EU login username
<input type="text"/>	<input type="text" value="n"/>
Timezone	
<input type="text" value="Europe/Paris"/>	



You can change your « **Clinical Focus** », namely by indicating if you are more involved in « **Adult** » or « **Pediatric** » cases.

To indicate or change your mentioned thematic areas, click on the « **Thematics** » button, then on « **ERN-EYE** » and tick the checkboxes corresponding to your specialities (3 options maximum).

Clinical Focus ?

Cares for * 1

Adult Pediatric

- > CRANIO
- > Endo-ERN
- > EpiCARE
- > ERKNet
- > ERN-EYE** 3
- > ERNICA
- > ERN-LUNG
- > ERN-RND
- > ERN-SKIN

4

ERN-EYE

- Anterior Segment Rare Eye Diseases
- Neuro-ophthalmology and rare eye diseases
- Other - ERN EYE

Thematics ▾ 2



Notifications

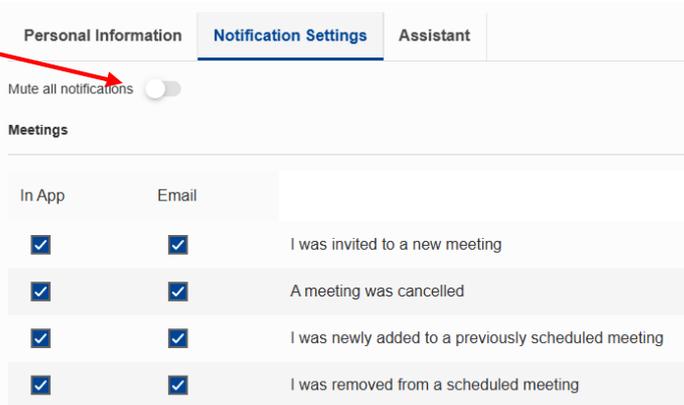


You can see all notifications you received by going to the  icon on the top right of the main page.

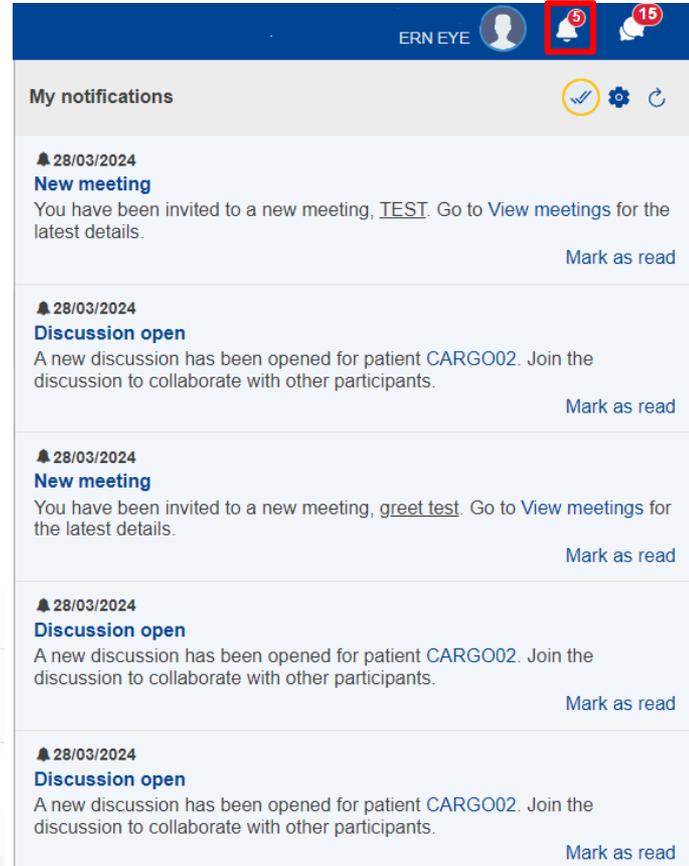
You can mark all notifications as read by clicking on the  icon.

You can change your notifications settings by clicking on the  icon.

Note that in the « **Notification Settings** » tab, you can also mute all notifications



Personal Information			Notification Settings	Assistant
Mute all notifications <input type="checkbox"/>				
Meetings				
In App	Email			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	I was invited to a new meeting		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	A meeting was cancelled		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	I was newly added to a previously scheduled meeting		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	I was removed from a scheduled meeting		



ERN EYE   

My notifications

- 28/03/2024**
New meeting
You have been invited to a new meeting, TEST. Go to [View meetings](#) for the latest details.
[Mark as read](#)
- 28/03/2024**
Discussion open
A new discussion has been opened for patient CARGO02. Join the discussion to collaborate with other participants.
[Mark as read](#)
- 28/03/2024**
New meeting
You have been invited to a new meeting, greet test. Go to [View meetings](#) for the latest details.
[Mark as read](#)
- 28/03/2024**
Discussion open
A new discussion has been opened for patient CARGO02. Join the discussion to collaborate with other participants.
[Mark as read](#)
- 28/03/2024**
Discussion open
A new discussion has been opened for patient CARGO02. Join the discussion to collaborate with other participants.
[Mark as read](#)



Assistant



My Account

Personal Information | Notification Settings | **Assistant**

My Assistants

By adding this person in here, they will receive access to the patient records you have access to, including, for some patients, non-anonymized data. Please note they will be able to perform all system actions you can perform on your behalf. You take full responsibility undertaken by an assistant at the patient level. Second delegation level is excluded.

Search for an assistant by name or center

Name	Centre	Profession	Actions
No assistants identified			

Colleagues I Am Assisting

Please remember that you are acting as an assistant on behalf below clinician(s). They keep full responsibility for all your actions undertaken at the patient-level.

Search for a clinician by name or center

Name	Centre	Profession	Actions
No clinicians identified			



In the « **Assistant** » tab, you can recruiting an assistant from your institution which may help you in enrolling patient in the system. Click on the « Add assistant tab » and add the user you want to be your assistant.

Please note that your assistant will be able to perform all actions you can perform in the system, meaning that you take full responsibility undertaken by an assistant at the patient level.

In the « **Colleagues I Am Assisting** » section , you can see the list of all clinicians for whom you are acting as an assistant.



Chat



To access the chat function in the system, please go to on the top right on the main page and click on the  icon.

Then select the name of the user you want to communicate with (you can also search a specific user by clicking on the filter icon and entering his/her name).

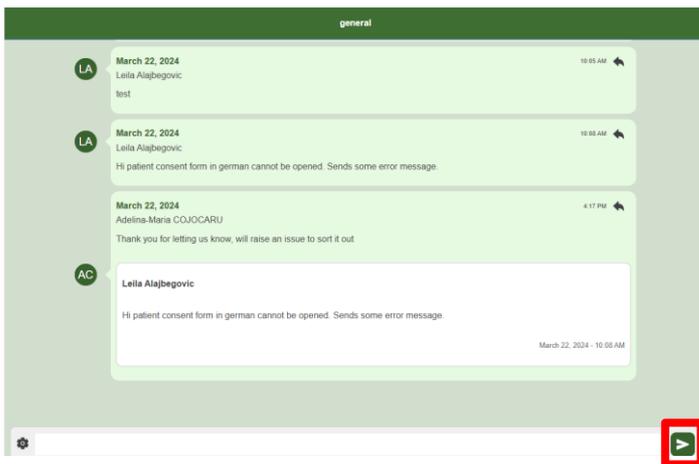
You can also choose a group you want to communicate with by going to the « **Group** » section.

The screenshot displays the chat interface. On the left, a sidebar contains a warning: "Patient-related information MUST NOT be posted here". Below this are sections for "Views": "Recent Conversations", "All Messages", "Direct Messages" (highlighted with a red box), and "Groups" (also highlighted with a red box). The main area is titled "Recent Conversations" and includes toggle switches for "Include DM's" and "Include unread", and a search bar labeled "Search by name". A conversation card for "General" is visible, showing it is "Read" and "6 days ago".

Please note that patient related information must not be posted here!!!



Then type your message and click on the  icon to send your message to the user.



You can also delete or edit your message by clicking on the « **recycle bin** » icon or the « **Edit** » icon.

