

FormsNet3 Training Guide

1 — Last update: Mar 27, 2024

CIBMTR.org

Table of Contents

1. Welcome	4
1.1. Access	6
1.2. Navigation	8
2. Home Tab	9
2.1. My Work/Messages	10
2.2. My Profile	12
3. Forms (Recipient and Donor)	13
3.1. Performing a Search	14
3.2. Information Grid	15
3.2.1. Create an Unscheduled Form	16
3.3. Forms Grid	18
3.3.1. Form Action Icons	19
3.3.2. Form Status	21
3.3.3. Form Change History	22
3.3.4. Attachment Feature	23
3.3.5. Lost to Follow Up	27
3.3.6. Survival Tool	29
3.4. Form Layout	30
3.4.1. Form Title Bar	31
3.4.2. Form Action Menu	32
3.4.3. Answer Types	34
3.4.4. Form Navigation	36
3.4.5. Question Enabling/Disabling	39
3.4.6. Auto-population	40
3.4.7. Validations	41
3.5. Center Forms Due	43
3.5.1. Recipient Center Forms Due	45
3.5.2. Disease Codes	49
3.5.3. Creating a CPI Forms Due List	51
3.5.4. Forms Completed by User List	53
4. Recipient Tab	54
4.1. Search for a CRID	55
4.2. Create a CRID	59
4.3. Editing the CRID Assignment (2804)	61
4.4. Reporting Data for NMDP Products	62
4.5. Transfer Tool	63
4.5.1. Initiating a Transfer	64
4.5.2. Completing the Transfer	66

4.5.3. Exiting a Transfer.....	71
4.5.4. Canceling a Transfer.....	72
4.6. Error/Query Report.....	74
4.7. Queries	76
4.7.1. Query Basics	77
4.7.2. How to Resolve a Query	80
4.7.3. Run a CPI List for Queries	83
5. Donor Tab	84
5.1. Search for a GRID.....	85
5.2. Queries	87
5.2.1. Query Basics	88
5.2.2. How to Resolve a Query	90
6. Upstream CRID	92
6.1. Eligibility Requirements	93
6.2. Process Overview	94
6.3. Cancellation and Opting Out	98
7. Admin Tab.....	99
8. Glossary.....	101
9. Contact Us	104

1. Welcome

FormsNet3SM

More than 99% of data collected by CIBMTR is submitted electronically via FormsNet3, a comprehensive electronic data submission system containing greater than 250 forms related to the capturing of HCT outcomes for donors and recipients.

Welcome to FormsNet3. This user guide is a quick reference to the FormsNet3 system for the following center types that use the application: AC/CC/DC/TC. Additional training is available in the NMDP Learning Center through eLearning modules (Category: Network Centers, Title: FormsNet3 Donor Release Course, and under Category: Data Management, Title: FormsNet3 Recipient Module Training).

For directions on how to access the Learning Center see the [Online Training](#) webpage. Any questions can also be submitted via [CIBMTR Center Support](#).

Key Benefits of FormsNet3

- Improved user experience
- Fewer data queries with improved validation
- Enhanced data capture
 - Auto-population of the current key fields and author information
 - Enabling and Disabling – showing only questions that require data
- Quicker form processing
- Increased efficiency

Recommended Internet Browsers

To fully support the features and tighter security standards developed for FormsNet3, the recommended browser is:



Other browsers that can be used are:

- Microsoft Edge
- Mozilla Firefox: 14 and greater
- Safari: 6 and greater

If you are having system difficulty or cannot login to the application, submit a ticket at [Report an Issue](#) or call (763) 406-3411 or toll free (800) 526-7809 x 3411. Questions can also be submitted via [CIBMTR Center Support](#).

! DISCLAIMER: Please note – all screenshots in this guide are from the FormsNet3 training environment and do not contain real patient data.

Guide Updates:

Sections of the FormsNet3 Training Guide are frequently updated. In addition to documenting the changes within each guide section, the most recent updates to the guide can be found below. For additional information, select the guide section and review the updated text.

Date	Guide Section	Add/Remove/Modify	Description
3/4/2024	Donor Tab Queries	Add	Added Query Basics and How to Resolve a Query instructions under the Donor Tab in FormsNet3

Last modified: Mar 08, 2024

1.1. Access

Logging In

Go to: <https://formsnet3.nmdp.org/Home/>

1. Enter your FN3 username and password
2. Click Sign In
3. Click Send Push

4. Approve the push notification on your mobile device

Logging Out

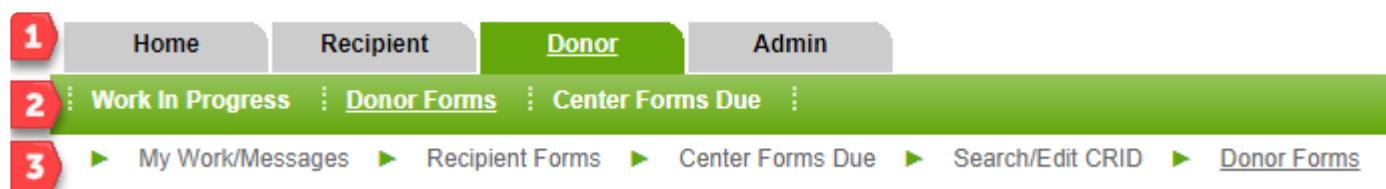
1. Click Log Off (upper right screen corner) whenever you leave your desk to keep data private.

2. You will see Signed Off as confirmation.

Note: FormsNet will log off automatically after 15 minutes of inactivity and you will need to login again.

Last modified: Mar 07, 2024

1.2. Navigation




1. Tabs – Home, Recipient, Donor, Admin

Underlined text in a green tab lets you know which screen you are in. Click on a different tab to change location and it will turn green and be underlined.

2. Menu bar – My Work/Messages, My Profile, etc.

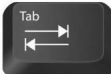
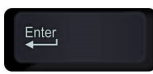
The menu bar contains features that are specific for the tab selected. Menu bar links will change depending on which tab you are in.

3. Breadcrumbs

This feature shows the path of screen changes that the user took in the application since logging in. These screen changes are separated by . Clicking on a breadcrumb opens that screen.

Moving around a form

Moving Around

Moving from question to question is done by using the Tab key , Enter key , or by clicking directly on form answer fields. If you would like to go to a particular question number, enter the number in the Q# box and click the “Jump to Question” arrow.

Saving

FormsNet3 automatically saves answers to each question once you move to the next question.

Last modified: Mar 08, 2024

2. Home Tab

Last modified: Sep 21, 2021


2.1. My Work/Messages

My Work

Once successfully logged into FormsNet3, the first screen is the My Work/Messages page. This screen displays several different grids for ongoing tasks within FormsNet3. It also contains any messages from CIBMTR to notify users of upcoming releases, issues, etc.

Transfer Tasks Grid

Displays any transfer that is in progress, either transferring to or from your center(s).

Transfer Tasks								
	Transfer Status	CRID	Event	From Center	To Center	Updated	User	

Recipient Query Tasks Grid

Displays any form or consent with an active query at your center(s). The Type of Query column indicates if a query was placed on a form or consent. If the query was placed on a form, you can access the form directly from the grid. If the query was placed on a consent, the CRID will feature a hyperlink that will bring you to the [Consent tool](#) for that specific CRID.

Recipient Query Tasks									
	Type of Query	CRID	Center	Event	Form	Visit	Sequence	Updated	

Recipient Tasks Grid

Displays all **recipient** forms that you have started at your center(s), including their status: ERR (Error), SVD (Saved), MOD (Modification) and RVW (Review). You can access any of your forms in progress directly from the grid.

Recipient Tasks													
	Status	CRID	NMDP RID	IUBMID/Team	Event	Form	Visit	Visit Details	Group	Sequence	Earliest	Due	Center

Donor Tasks Grid

Displays all **donor** forms that you have started at your center(s), including their status: ERR (Error), SVD (Saved), MOD (Modification) and RVW (Review). You can access any of your forms in progress directly from the grid.

Donor Tasks											
	Status	Donor ID	Registry Donor ID	GRID	Form	Visit	Seq#	ECD	Due Date	Primary Center	

Messages

CIBMTR will occasionally post news about the FormsNet3 system in the messages box located on the right side of the Home screen. Be sure to check here often for updates.

The screenshot displays the FormsNet3 SM web application interface. At the top, the logo "FormsNet3SM" is accompanied by the tagline "Sharing knowledge. Sharing hope." and the CIBMTR logo (Center for International Blood & Marrow Transplant Research). Below the header, a navigation bar includes tabs for "Home", "Recipient", "Donor", "Admin", and "Define Form". A secondary navigation bar shows "My Work/Messages" and "My Profile". The main content area is titled "My Work" and features a list of filters: Status, CRID, NMDP RID, IUBMD/Team, Event, Form, Visit, Visit Details, Group, Sequence, Earliest, Due, and Center. A purple arrow points from the "My Work/Messages" tab to the "Messages" link in the right-hand sidebar. The sidebar contains three message categories: "System", "Recipient", and "Donor", each with the text "No messages at this time." at the bottom of the list. A pagination bar at the bottom of the main content area shows "1 - 10 of 57 items".

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2.2. My Profile

Your personal information is displayed based on your login credentials under My Profile. Be sure your name and email are correct on this screen as this is the information that will display on any form you submit. If incorrect, a ticket can be submitted via [CIBMTR Center Support](#).

Your personal preferences only need to be set once, not each time you access the application. Changing these grid preferences affects the display of all grids that you access. Try different options to decide what you prefer:

- Choose the number of records you want to see in grids at one time
- Choose whether to display colors in your grids
- Click on **Submit Now** to save your changes

The screenshot shows the 'My Profile' page with the following elements:

- Navigation Tabs:** Home (selected), Recipient, Donor.
- Breadcrumbs:** My Work/Messages > My Profile.
- Section Header:** My Profile.
- Personal Information:**
 - Text: You are affiliated with the following centers...
 - Fields: First Name: first name, Last Name: last name, Email: email@email.org.
 - Center List: A box containing 'Your center(s) will be listed here.'
 - Text: If 'Personal Information' listed above is incorrect, [redacted].
- Personal Preferences:**
 - Number of Records Displayed in Grids: ☐ 10 ☐ 25 ☒ 50
 - Show Status Colors in Grids: ☒ Full Row ☐ Status Column Only ☐ No Color
 - ☒ Show Grid Filters
 - Choose Language: English (United States) (dropdown menu)
- Buttons:** Submit Now, Cancel.

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3. Forms (Recipient and Donor)

The information included in this section is for both Recipient and Donor.

Last modified: Sep 21, 2021

3.1. Performing a Search

Donor	Recipient
<p>Under the Donor Tab is access to Donor Forms. Click on the link in the menu bar to open it. Use this section when you want to look up a form for a specific donor.</p> <p>1. Donor Tab > Donor Forms: The Donor Forms screen will display. Click on one of the following, in the Search by Type dropdown list:</p> <div><div><div>Donor Forms</div><div><div>Search by Type</div><div>Enter ID</div><div><div>GRID</div><div>Donor ID</div><div>Sequence Number</div><div>Registry Donor ID</div><div>GRID</div></div><div><div>5-2</div><div>5-2</div></div></div><div><div>Registry Donor ID</div><div></div></div></div></div> <p>2. After selecting Search by Type, enter the correlating number in the field Enter ID.</p> <p>3. Click Search.</p>	<p>Under the Recipient Tab is access to Recipient Forms. Click on the link in the menu bar to open it. Use this section when you want to look up a form for a specific recipient.</p> <p>1. Recipient Tab > Recipient Forms: The Recipient Forms screen will display. Click on one of the following, in the Search by Type dropdown list:</p> <div><div><div>Recipient Forms</div><div><div>Search by Type:</div><div>Search For:</div><div><div>CRID</div><div>CRID</div><div>NMDP RID</div><div>IUBMID/Team</div><div>EBMT ID</div><div>Sequence Number</div></div><div><div></div></div></div></div></div> <p>2. After selecting Search by Type, enter the correlating number in the field Search For.</p> <p>3. Click Search.</p>

Last modified: Mar 08, 2024

3.2. Information Grid

The Information Grid reflects all of the basic information for the Donor or Recipient, depending on the tab selected.

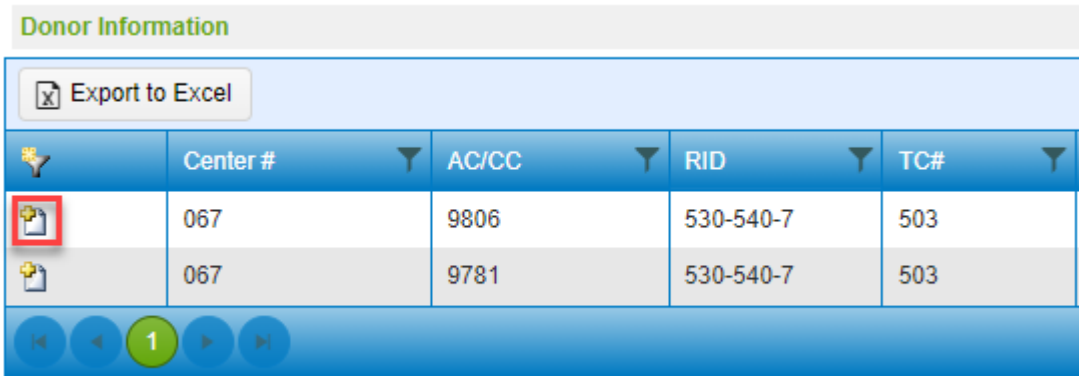
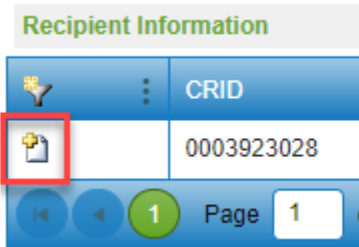
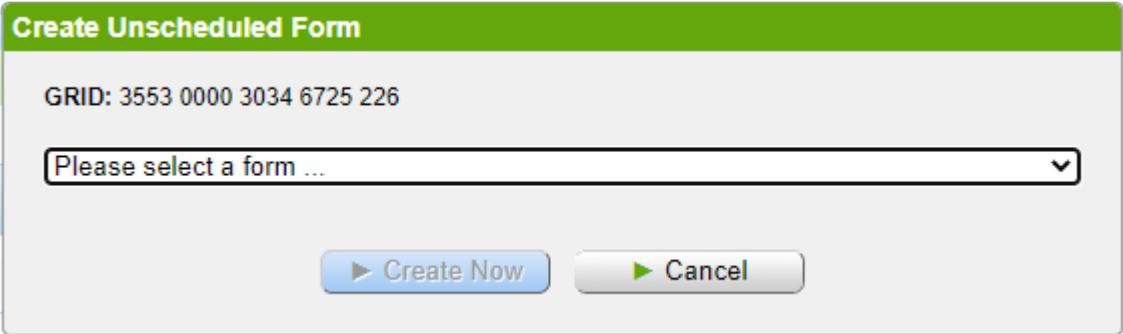
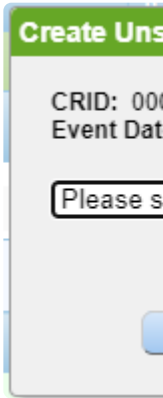
Donor Information Grid	Recipient Information Grid
• Center #	• CRID
• AC/CC	• Event
• RID	• Study Number
• TC #	• NMDP RID
• Sat. ID	• IUBMID/Team
• PE Date	• EBMTID
• IPE (1-3) (3 separate columns)	• Donor/CBU ID
• Product	• Product Type
• Injection Start	• Infusion Type
• Collection (1-2) (2 separate columns)	• Treatment Path
• LTDFU	
• Project	

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3.2.1. Create an Unscheduled Form

You can access a list of available unscheduled forms from within the Information Grid.

1. Click on the **Unscheduled Form** icon to see which forms are available.
2. A pop-up box saying **Create Unscheduled Form** will appear.
3. Select the form you want to create from the dropdown list. Some forms may prompt you to answer a question prior to clicking the **Create Now** button.

Donor Screenshot	Recipient Screenshot
<p>1.</p> 	<p>1.</p> 
<p>2.</p> 	<p>2.</p> 
<p>3.</p>	<p>3.</p>

Create Unscheduled Form

GRID: 3553 0000 3034 6725 226

Please select a form ...

Please select a form ...
Form #701 (R6.0) - Stem Cell Donor Adverse Event Form
Form #705 (R7.0) - Donor Pregnancy Testing and Assessment
Form #715 (R2.0) - Neupogen (filgrastim) Administration Confirmation
Form #779 (R5.0) - Donor Follow-Up Withdrawal
Form #781 (R4.0) - Stem Cell Donor Follow Up Evaluation Greater Than One Week
Form #3000 (R6.0) - Protocol Deviation Form

Create Unscheduled Form

CRID: 0000
Event Date

Please select a form ...

Please select a form ...
Form #201
Form #202
Form #203
Form #204
Form #301
Form #302
Form #303
Form #304



If you change your mind, you can click the Cancel button. When the system returns to the Recipient or Donor Forms screen, your original search criteria will be retained. This can only be done prior to submitting the form.


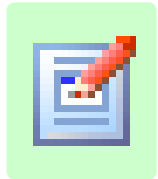

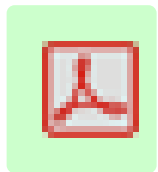



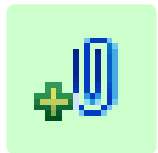
Last modified: Mar 08, 2024



3.3. Forms Grid

This section will describe the different functionalities within the Forms Grid.

Last modified: Sep 21, 2021

3.3.1. Form Action Icons

Icon Title and Description	Icon
Create New Form <ul style="list-style-type: none"> Opens a new form for data entry 	
Edit Form <ul style="list-style-type: none"> Opens the form in edit mode allowing changes to be made 	
View Only Mode <ul style="list-style-type: none"> Opens the form, but no changes can be made 	
View Form in PDF <ul style="list-style-type: none"> Opens a Legacy form in a PDF format 	
View Error Report <ul style="list-style-type: none"> Opens the error report for any form that has been submitted with unresolved errors or had any overridden errors 	
View Form Change History <ul style="list-style-type: none"> Opens the form change history for that specific form 	
Change Form Status to Lost to Follow-Up <ul style="list-style-type: none"> Displays a dialog box where you must select at least one reason for changing the status to Lost to Follow-up before being able to proceed further 	
Add Attachment <ul style="list-style-type: none"> Attach a PDF or Word doc to that specific form 	

View Attachment <ul style="list-style-type: none">• View any attachments to that specific form	
Print Form <ul style="list-style-type: none">• Opens a printable view of that specific form	

Last modified: Sep 21, 2021

3.3.2. Form Status

The current status of the form is displayed in the second column of all form grids. Color display can be set in the Personal Preferences box in my profile, under the HOME tab. You can choose whether to display the color for the whole row, just in the status column, or to have no color.

Status abbreviation meanings and color examples are in the following chart:

Donor Screenshot		Recipient Screenshot	
Purpose	Color	Purpose	Color
Form has not been started	DUE	Form has not been started	DUE
Form is complete	CMP	Form is complete	CMP
Form has errors	ERR	Form has errors	ERR
Forms saved	SVD	Forms saved	SVD
Form in sign status	SGN	Form in sign status	SGN
Form has been modified	MOD	Form has been modified	MOD
Form is locked	LCK	Form is locked	LCK
Form is locked for audit purposes	AUD	Form is locked for audit purposes	AUD
Form is Lost to follow-up	LTF	Form is Lost to follow-up	LTF
Form only has survival date reported	SUR	Form only has survival date reported	SUR
Query	QRY	Query	QRY
Form is pending	PND	Form is pending	PND
Form is locked for audit purposes; has open queries	AQR	Form is locked for audit purposes; has open queries	AQR
Form is locked for audit purposes; has pending queries	APN	Form is locked for audit purposes; has pending queries	APN
Form is in evaluation status	RVW	Form was modified by auditor	AE
		Form has audit errors	AE

Last modified: Mar 08, 2024

3.3.3. Form Change History

The **Form Change History** allows you to see previous form changes and the username of the person who made the prior submission.



The Form Change History icon displays after the form is submitted for the first time. Click on the icon to be navigated to the Form Change History of the specific form on the row that you selected.

Information displays by the date it was submitted.

- Click on the small triangle in front of the date. Pointing down expands and points up collapses the whole group at once.
- Below the word Submitted is the date of submission. The username of who entered the data will appear to the right of the date.

Donor Screenshot

Form Change History

Export to Excel

Submitted	User Name
▶ 2021-06-29	System
▶ 2021-06-25	fn3_esb

1
2021-06-29
2021-06-25

1 - 2 of 2 items

Recipient Screenshot

Form Change History

Export to Excel

Submit

2021-06-29

2021-06-25

2021-06-24

2021-06-23

Last modified: Sep 21, 2021

3.3.4. Attachment Feature

The attachment feature allows users to attach electronic documents to a form or to an ID. Attaching associated documents (lab reports, progress notes, etc.) to a form or ID is not required, but you are encouraged to attach supporting documents to reduce requests for documents. This feature is a way for users to add a document easily and efficiently when necessary (ex. requests from CIBMTR, reduce queries by CIBMTR when lab values are significantly out of range, etc.).

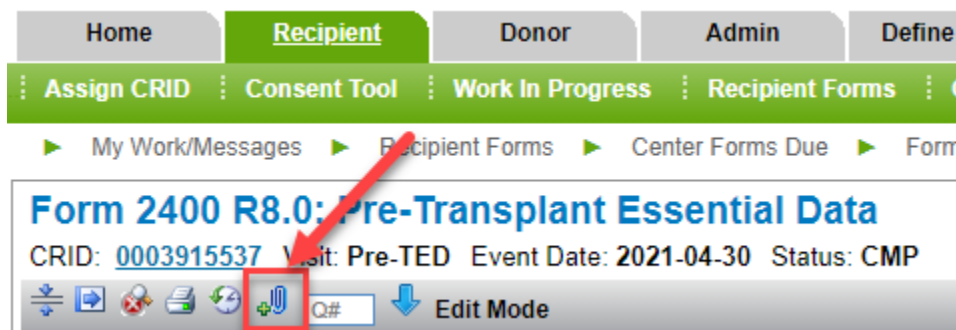
Guidelines when attaching a document

- All identifying information on the document must be removed or obscured prior to attaching (i.e. patient's name, DOB, social security number, address). If an attached document has identifying information, it will be deleted, and you'll be asked to reattach the document.
- Attached document must have the CRID clearly located on each page of the document.
- The following file types can be attached and viewed: .pdf, .doc, .docx, .xls, .xlsx, .pptx, .txt, .jpg, .jpeg, .png, .tif, .tiff, .gif
- Do NOT attach error corrections, they will not be keyed if they are attached to a form.
- The same general rules apply for the Donor tab – fields will have different labels, but the functionality is the same

There are several ways to attach an electronic document to a form in FormsNet:






1. Within the form

When opening a form in 'Edit' mode you will find a new icon on the menu bar. Simply click on the 'Add Attachment' icon to begin.



2. On Forms Grid

After searching within the recipient forms grid you will find a new icon on the Forms Grid for forms that have a status of SVD, ERR, MOD, CMP, AUD, and QRY. Simply click on the 'Add Attachment' icon to begin.

Forms						
Export to Excel						
	Status	Center	Event	Form	Visit	
	CMP	12001	2021-04-30	2400	Pre-TED	
	CMP	12001	2021-04-30	2402	Pre-TED	
	CMP	12001	2021-04-30	2000	Baseline	
	CMP	12001	2021-04-30	2006	Product 1	
	CMP	12001	2021-04-30	2814	Indication	

After clicking on the 'Add Attachment' icon from either within the form in 'Edit' mode or the Forms grid you will get a pop-up screen.

1. 'Select File' will allow you to browse your computer to locate the file that you would like to attach.
2. You will then be required to select a category for the file you are attaching. Once you have selected a file and category you can then upload the document. There is not a limit to the number of documents you can attach to a form.

Add Attachment

CRID: 0003915537 Form: 2400
Event Date: 2021-04-30 Visit: Pre-TED

Select a File and a Category

Select file... 1

Selected File:

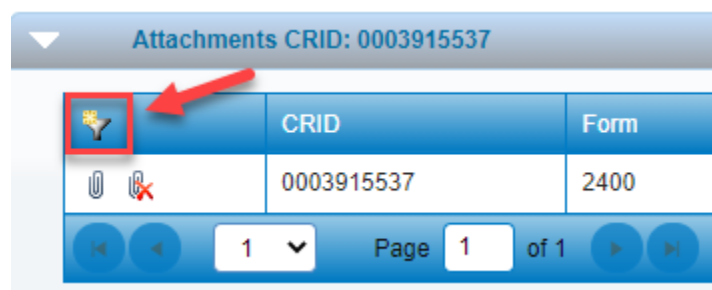
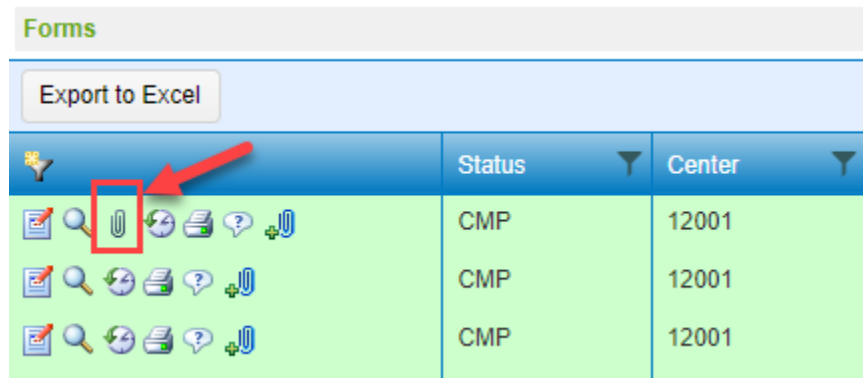
Category: 2

Err Corr
Audit Report
Lab Report
Progress Notes
Miscellaneous
Pathology/Autopsy Report
Cytogenetic Report
Chimerism Test
New Malignancy Report
HLA Report
Prescribing Orders/Medication Orders
Radiology Report
Pathology Report at Diagnosis
Scanned Form
Genetic Mutational Panel
SC21-07/BMT CTN 2101

Cancel

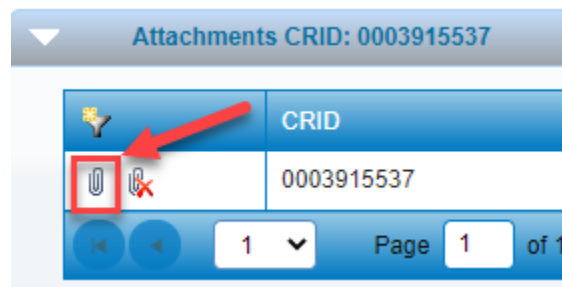
Identify Forms with Attachments

On the Forms grid you will now see a new icon indicating at least one document has been attached to the form. Clicking on the 'View attachment' icon will populate the 'Attachment' grid with the attached document. If you would like to see attached documents for all forms simply click on the 'clear all filters and sorts' icon on the attachment grid.



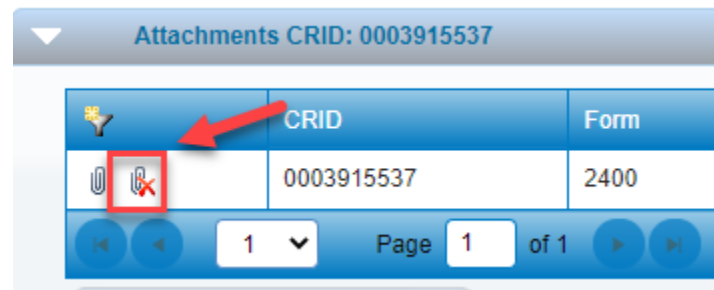
Opening an Attached Document

To open a document that has been attached to a form click on the 'View attachment' icon found in the attachment grid. The document will open in a new browser tab or window.



Deleting an Attached Document

To delete a document that has been attached to a form click on the paperclip icon with a red X found in the attachment grid.



Once you click on this icon you will get a pop-up confirmation box asking you to confirm that you would like to delete the document. If you select 'Yes' the document will be permanently deleted from the FormsNet3 system.

Last modified: Mar 08, 2024

3.3.5. Lost to Follow Up

A donor/recipient may be declared Lost to Follow-up, only after the center has tried to make contact and is unsuccessful at reaching the donor/recipient.



The Lost to Follow-up icon only displays for eligible forms and only if the form is in DUE status.

! When making a form LTF, it must be done for the **main form** (2100, 4100, 2450). The disease insert **cannot** be made LTF independently. The disease insert will be set to LTF automatically when the main form is updated.

Once the icon is clicked, a dialog box displays.

1. Select a reason code for Lost to Follow-up by clicking on the box in front of it
2. After a reason code is selected click on Submit Now, then the form status will change to LTF

Make Form Lost to Follow-up or Survival

☒ Lost to Follow-up
 ☐ Survival

CRID	Form	Visit	Event Date	Center
0003901156	2100	5 year	2017-02-01	10001


Reason for Lost to Follow-up (Check all that apply)

<input type="checkbox"/>	Called home and/or work phone numbers - all phone numbers no longer current
<input type="checkbox"/>	Sent Letter - returned forwarding expired or non-deliverable for some reason
<input type="checkbox"/>	International recipient – have lost contact
<input type="checkbox"/>	Treating physician has not seen recipient or has not had any contact in the past year
<input type="checkbox"/>	Contacted hospital billing department

▶ Submit Now

▶ Cancel

 The 100-day form is not able to be set to LTF. If an infusion happened, there is information to report on the 100-day form.

- If the Lost to Follow-up icon is clicked in error, click on **Cancel** to clear and close the Lost to Follow-up dialog box. The form will remain in DUE status.
- If data becomes available after a form was made Lost to Follow-up, the form can be reset using the reset icon  on the recipient forms grid and the form will return to DUE status.
- If the form you wish to make LTF is in SVD status:
 - Click the EDIT form icon in the first row of the forms grid.
 - Then click the CLEAR FORM icon.
 - The window opens to verify that you want to clear data from the form, click Yes.

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3.3.6. Survival Tool

Survival status may be reported when the only information known for a visit is that the recipient is alive.




Survival status shares an icon with Lost to Follow-up .

! When using the Survival Tool to report patient survival, it must be done to set the **main form** (2100, 4100, 2450) to SUR. The disease insert **cannot** be set to SUR independently. The disease insert will be automatically set to SUR when the main form is updated.


Select the survival button and then report the latest contact date applicable to the form you want to report the recipient's survival.

Make Form Lost to Follow-up or Survival

☐ Lost to Follow-up ☒ Survival

Contact Date: 

* The 100-day form is not able to be set to SUR. If an infusion happened, there is information to report on the 100-day form.

If data becomes available after a form is placed in Survival status, the form can be reset using the reset icon  on the recipient forms grid and the form will return to DUE status.

At this time, this tool is not a function for Donors.

Last modified: Mar 27, 2024


3.4. Form Layout

Last modified: Sep 21, 2021

3.4.1. Form Title Bar

Every form has a Form Title Bar. The information in the Form Title Bar is standard across all forms and remains stationary as you scroll through the form. The Form Title Bar contains the following information:

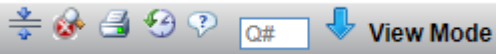

Donor	Recipient
<div><div>Form 705 R7.0: Donor Pregnancy Testing and Assessment</div><div>GRID: <input type="text"/> Visit: Pregnancy Initial Event Date: 2021-06-24 Status: CMP</div><div><div><div><div></div><div></div><div></div><div></div><div></div><div></div></div><div><div>Q#</div><div>View Mode</div></div></div></div></div> <div><div>Form 210</div><div>CRID: <input type="text"/></div><div><div><div><div></div><div></div><div></div><div></div><div></div><div></div></div><div><div></div><div></div><div></div><div></div><div></div><div></div></div></div></div></div>	<div><div>Form 210</div><div>CRID: <input type="text"/></div><div><div><div><div></div><div></div><div></div><div></div><div></div><div></div></div><div><div></div><div></div><div></div><div></div><div></div><div></div></div></div></div></div>
<ul style="list-style-type: none">Form number: 705	<ul style="list-style-type: none">Form number:
<ul style="list-style-type: none">Form revision number: R7.0	<ul style="list-style-type: none">Form Revision:
<ul style="list-style-type: none">Form Title: Donor Pregnancy Testing and Assessment	<ul style="list-style-type: none">Form Title: Po
<ul style="list-style-type: none">GRID: <i>varies</i>	<ul style="list-style-type: none">CRID: <i>varies</i>
<ul style="list-style-type: none">Visit: Pregnancy Initial	<ul style="list-style-type: none">Visit ID: 4 yea
<ul style="list-style-type: none">Form Status: CMP (complete)	<ul style="list-style-type: none">Form Status:

 You must be in **Edit Mode** to enter or change data on the form. View-only mode allows you to view the form, but no changes can be made. Look on the Form Action Menu to see which mode you are in.

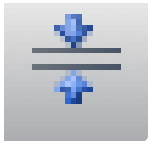





Last modified: Mar 08, 2024

3.4.2. Form Action Menu

Under the Form Title Bar is a row of icons, as shown below.

Donor Screenshot	Recipient Screenshot
	

Each has a defined purpose.

Definition	Icon
Collapse all – Expand all Sections <ul style="list-style-type: none"> All sections (including multiple sections) of the form will either expand or collapse 	
Submit <ul style="list-style-type: none"> Submits all data entered on the form to the CIBMTR database The form status updates in the form grid All errors on the form need to be resolved or an override code entered before the form is considered complete 	
Review Unresolved Errors <ul style="list-style-type: none"> This icon will reflect all the errors within the form 	
Print <ul style="list-style-type: none"> The system prints the form in its current state 	
Jump to Question <ul style="list-style-type: none"> Enter a question number in the Q# box and click the down arrow. The system brings the user directly to that question within the form 	
Clear Form <ul style="list-style-type: none"> Clears all data entered on the form This icon only appears for <i>scheduled</i> forms Once the user clicks the Submit icon, this icon will no longer be an option If you need to have your form cleared or reset after it has been submitted, submit a ticket to CIBMTR Center Support 	

Cancel Form

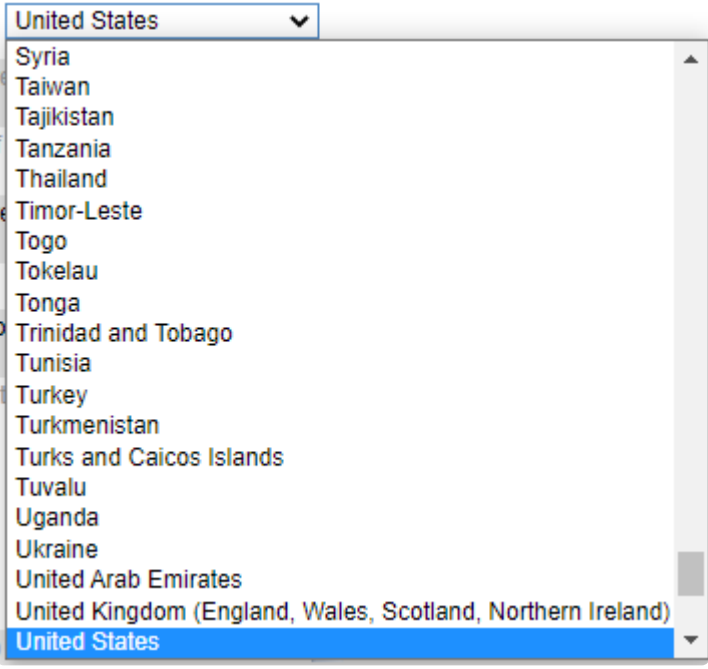
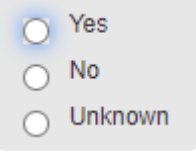
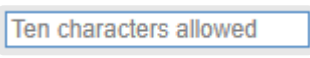
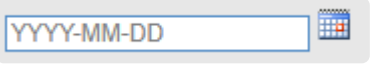
- Cancels the creation of the form in its entirety
- This icon will only appear for *unscheduled* forms
- Once you click the Submit icon, this icon will no longer be an option



Last modified: Sep 21, 2021

3.4.3. Answer Types

The following answer types are used to complete questions within the forms.

Answer Type	Image
Dropdown boxes	
Radio Buttons	
Text fields	
Date fields	

Check all that apply	<p>38 Prior viral exposure / infection (check all that apply)</p> <ul style="list-style-type: none"><input type="checkbox"/> HTLV1 antibody<input type="checkbox"/> Anti-EBV (Epstein-Barr virus antibody)<input type="checkbox"/> Hepatitis B surface antibody<input type="checkbox"/> Anti HBc (hepatitis B core antibody) - For hepatitis tests that have a reactive result, also complete HEP form 2047.<input type="checkbox"/> HBsAg (hepatitis B surface antigen) - For hepatitis tests that have a reactive result, also complete HEP form 2047.<input type="checkbox"/> Hepatitis B - NAAT - For hepatitis tests that have a reactive result, also complete HEP form 2047.<input type="checkbox"/> Anti-HCV (hepatitis C antibody) - For hepatitis tests that have a reactive result, also complete HEP form 2047.<input type="checkbox"/> Hepatitis C - NAAT - For hepatitis tests that have a reactive result, also complete HEP form 2047.<input type="checkbox"/> HIV antibody - For HIV tests that have a positive result, also complete HIV form 2048.<input type="checkbox"/> HIV - NAAT - For HIV tests that have a positive result, also complete HIV form 2048.<input type="checkbox"/> Toxoplasmosis antibody<input type="checkbox"/> Not done<input type="checkbox"/> Not applicable (all viral testing negative)
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Last modified: Sep 21, 2021

3.4.4. Form Navigation

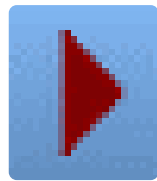
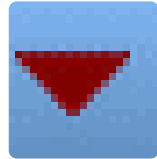

Click vs Tab Navigation

You can navigate through the form either by using your mouse to click to answers or by pressing the tab key on your keyboard.

- If the question on the form is a dropdown, radio button, or check box, once you click the answer to the question, the system will automatically move the cursor to the next question that must be answered.
- If the answer to the question is a text box, you need to use the tab key to automatically be navigated to the next question that must be answered.

Form Section Bar

All forms will have at least one Form Section Bar, which displays the section title and the question number range of the section, if applicable, along with the following information.

<p>Expand a section</p> <ul style="list-style-type: none"> • Only that section will expand to expose the questions within that section 	
<p>Collapse a section</p> <ul style="list-style-type: none"> • Only that section will collapse to hide the questions with that section 	
<p>Book</p> <ul style="list-style-type: none"> • A slide box appears with instructional information specific for that section • This icon only appears if there is instructional text available for that section 	

Go to Top

There is an icon of an up arrow on the right side of the screen. Click the icon to return to the top of the screen.

Field Level Saving

FormsNet3 automatically saves the answer to each question when you navigate to the next appropriate question.

Multiples

Some questions or groups of questions on a given form can be repeated multiple times. The term 'Multiple' applies to this feature of a form.

Multiple Instances

The number of multiple instances displays in a parenthesis after the multiple title in the section header. You can add a multiple instance by clicking on either the multiple section header or footer.

Date and Time Fields

- The date format for all date fields will be the following: YYYY-MM-DD.
- The time format for all time fields will be the following: HH: MM.


Error/Query Icon

When you answer a question on the form and it does not meet the validation rules, the system will display an Error icon to the left of the field. This feature also allows you to view queries within a form.

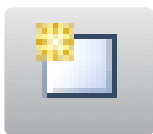
Error Message, Override, and Comments

When you click the Error icon, the system displays the following:

- Error message for that question. If there are multiple errors on that question, click on the answer to be forwarded to the next error message.
- The system displays the appropriate override codes for that question.
- If you need to enter an override code, you can provide a short comment to explain why the field was answered the way it was.

 Some fields will not allow you to override an error. Those fields must be answered.

Clear Field



Clear Field icon only appears on radio button answer types. When you click the Clear Field icon, the system removes the answer for that specific question only.

Field Change History

Once the form has been submitted, if you go back into the form to edit an answer, the system displays a Field Change History pop-up box. Select a code to describe the reason for changing the answer before navigating away from the question or screen. The field change history codes display in the Form Change

History.

Last modified: Mar 08, 2024

3.4.5. Question Enabling/Disabling

To ensure that all the appropriate form questions are answered, questions are automatically enabled based on data entered to previous questions. If a field is disabled, the user will not be able to enter data into that field.

Last modified: Sep 21, 2021

3.4.6. Auto-population

FormsNet3 will auto populate select fields on all forms (excluding the Adverse Event forms). The name and email of the person completing the form will also be auto populated on all forms.




To edit an auto-populated field, you need to update the source field. Most source fields are located on the CRID assignment form 2804, but some are also on the Pre-Ted (forms 2400/2402) or other forms. Once the source field is updated, when the form is reopened, the updated information will display on all subsequent forms, and on forms that were submitted prior to the edit.

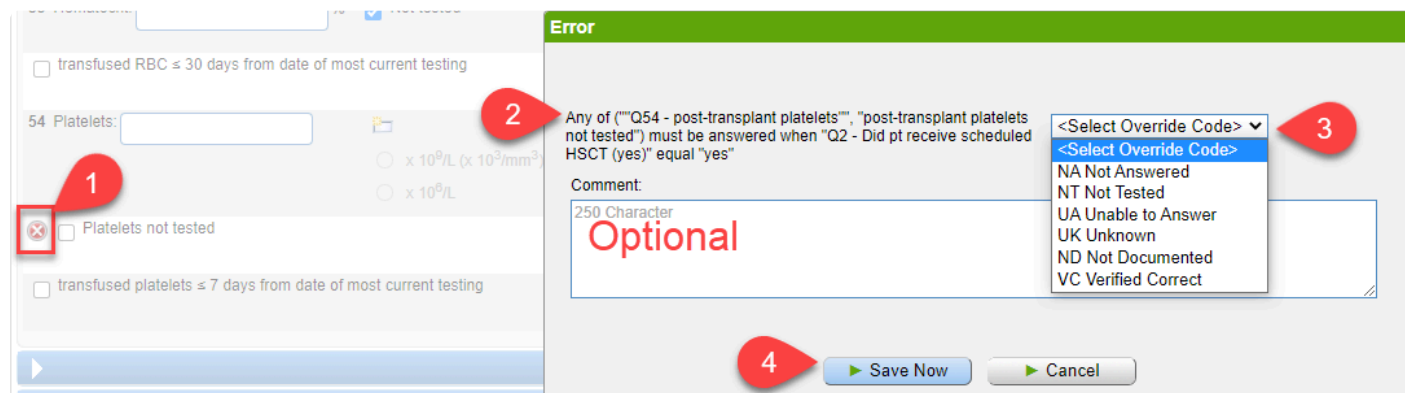
Last modified: Mar 08, 2024

3.4.7. Validations

Validations are rules within forms that check for accuracy of data entered into the system. These rules look for acceptable data entry responses, words, or number ranges for each field to ensure the data is clean, correct, and useful.

To resolve a validation error, the user must open the form in EDIT mode. A field with a validation error will have the error icon to the left of the question number or question text .

1. Open the error override pop-up by clicking on the error icon.
2. Determine what caused the error to generate by reading the error message. In the example, the value reported is outside the validation range on that field.
3. If confirmed that the data entered is correct based on your source documentation, then override the error using one of the override codes whatever makes sense for that particular error.
 - a. A comment can also be added to provide additional details, such as “a lab report was sent to verify”. When values fall well outside a validation range, it is a good idea to provide the source documentation to CIBMTR to prevent future queries to this field.
4. Once an override code is selected, click ‘Save Now’ and the error will be resolved, and the error icon will clear.



The screenshot shows a form with a validation error. The error message is: "Any of (\"Q54 - post-transplant platelets\", \"post-transplant platelets not tested\") must be answered when \"Q2 - Did pt receive scheduled HSCT (yes)\" equal \"yes\"". The error icon is a red circle with a white X. The pop-up window has a green header "Error". It contains a dropdown menu for "Select Override Code" with options: NA Not Answered, NT Not Tested, UA Unable to Answer, UK Unknown, ND Not Documented, and VC Verified Correct. There is also a "Comment" field with a 250 character limit. The "Save Now" button is highlighted with a red circle 4.




Limit Using Override Code

Many of the fields on the forms have answer options, such as: unknown, not reported, or not tested. If that is the case, please use the appropriate response instead of overriding the question.

Correcting inconsistent data rather than overriding the error

Other validation errors may occur when data across forms does not match, when it should. In this example, the lymphoma histology reported on the NHL (Form 2018), does not match the lymphoma histology reported on the Pre-TED (Form 2402). To resolve this error, you would investigate the information to verify which form is correct, then the form in error should be updated to the correct the data rather than assigning an

override code to the error.

Is this the report of a second or subsequent transplant or cellular therapy for the same disease? 

☐ Yes
☒ No

▼


❌ 1 Specify the lymphoma histology (at diagnosis)

Burkitt lymphoma (111) ▼

2 Specify other lymphoma histology: One

3 Assignment of DLBCL (germinal center)

☐ Immunohistochemistry (e.g. Han's)
☐ Gene expression profile
☐ Unknown method

4 Was documentation submitted to the CIBMTR? (e.g. path report from diagnosis) 

Error

"Q1 - Specify the lymphoma histology" must be equal to "Form 2402 - Pre-TED : Q386 - Specify the original lymphoma histology (Follicular, predominantly large cell (Grade IIIA follicle center lymphoma))"

<Select Override Code> ▼

Comment:

250 Character

► Save Now ► Cancel

Last modified: Sep 21, 2021

3.5. Center Forms Due

Creating a Center Forms Due Report

You can run a real-time Forms Due Report any time. Under the Donor or Recipient tab, select Center Forms Due from the Menu bar. The screen below will appear. You can customize a report by setting up filters using the following criteria:

- Center(s)
- Status Code
- Forms
- Date Type
- CPI Period
- Start Date
- End Date
- Infusion Type

Forms due can be searched for by checking the box next to a single center's name, or, when the user has privileges to more than one center, then a list of those centers will populate in the **Centers** box to select from. To search all centers in the list, check the **Select All** icon in the row above the centers box. The icon to the right of select all, is the **Clear All** icon. In the **Forms** box, you can filter your display by specific form names and numbers.

Run a Report









Once all the parameters are set up to search for what you need, click **Search** to see the report.

Last modified: Sep 21, 2021

3.5.1. Recipient Center Forms Due

Creating a Center Forms Due Report

You can run a real-time forms due report any time using the Center Forms Due tool. Under Recipient tab, select Center Forms Due from the Menu bar. You can customize a report using the following criteria:

Search Criteria	Details
Centers	FormsNet3 will default to all centers for which you have the appropriate access. If you aren't seeing a center you'd expect, submit a ticket to CIBMTR Center Support .
Status Codes	FormsNet3 will default to all incomplete status codes (DUE, ERR, SVD, MOD, QRY). Click the Unselect All icon  to clear the default selections. Click the Select All icon  (green checkbox) to select all status codes. Click the Needs to be Completed icon  (red exclamation point) to select only those forms that count as incomplete for CPI (default) (DUE, ERR, SVD, MOD, QRY).
Forms	Click the Unselect All icon  (empty box with yellow star) to clear the default selections Click the Select All icon  (green checkbox) to select all forms Click the Select CPI Forms  (red exclamation point) to select only those forms that are expected for CPI.
Date Type CPI Period Start Date End Date	Your center's location (US or Non-US) should be selected by default. <ul style="list-style-type: none"> Date Type will default to Form Due Date. This can be updated to search by Event Date (Infusion Date) or Earliest Complete Date (first date CIBMTR expects the form). Selecting a CPI Period will auto-populate the relevant CPI period start and end dates. Use the date picker to select custom start and end dates.
HCT Infusion Types CT Infusion Types	Leave blank to search for all infusion types. Select the checkboxes to filter results to specific donor/infusion type(s). Click the Unselect All icon  (empty box with yellow star) to clear any selections. Click the Select All icon  (green checkbox) to select all infusion types

Results Grid

Once all the parameters are set up to search for what you need, click Search to see the results. The table below the search criteria will populate with any results matching your specified criteria.

Customizing Results Grid

Additional filters and sorting can be applied to the result set if desired.

Click the three dots to the right of any column label to get a pop-up with 4 options. Select the option to apply the additional criteria.

Sort Ascending/Descending – use to sort list by the column you selected.

- Column will appear with an arrow in the direction of the sort.
- Multiple sorts can be applied at the same time – columns will number by the sort order
 - Please note, the column Form category does not allow sort ascending/descending.




Columns – use to add or remove columns from the output. From the list that pops up, select the columns you'd prefer to view and unselect the columns that you don't need. See below for a description of each column.

Column	Description
Status	Form Status
CRID	CIBMTR Research ID
NMDP RID	NMDP Recipient ID (if entered in CRID Assignment)
IUBMID/Team	Legacy IBMTR ID/Center-defined ID / IBMTR Legacy Center Number (if entered in CRID Assignment)
EBMT ID	European Blood and Marrow Transplant Group Patient Identified (if entered in CRID Assignment)
Event	Usually Infusion Date
Form	Form Number
Form Category	CPI Category – dictates target completion percentage
Visit	Follow-up time point
Visit Details	Additional details about form
Group	Used to link together Adverse Event Reporting Forms
Sequence	Unique identifier associated with this form
Center	CCN responsible for completing form
Primary	Primary disease for the specific CRID and event date

Disease	
Earliest	First date CIBMTR expects the form (Earliest Complete Date)
Due	Form due date
Complete	Date form was first submitted to complete status (CMP)
Completed By	User that first submitted the form to complete status (CMP)
Updated	Most recent update date
User	User who most recently updated the form

Filter – use to apply additional filter criteria on the selected column.

1. Select operator (first dropdown)
2. Enter or select value
3. If desired, select a second filter criteria (bottom dropdown and value)
4. Use the middle dropdown to indicate whether to apply both criteria (AND) or either criteria (OR)
5. Click Filter to update results

To clear all filters and sorts, select the Clear All Filters and Sorts  icon at the top left of the results grid.

Operator	Definition
Is equal to/Is not equal to	Use with specific values
Is null/Is not null	Use to look for blank or non-blank values
Is before/Is before or equal to	Used with dates (less than)
Is less/Is less or equal to	Used with numbers (CRID, Form, Center)
Is after/Is after or equal to	Used with dates (greater than)
Is greater/Is greater or equal to	Used with numbers (CRID, Form, Center)
Contains/Does not contain	Used for partial values

Export to Excel by clicking the button in the top left corner of the results grid. Exports will retain all sorts and filters applied within FormsNet3.

Forms													
Export to Excel													
Status	CRID	Event	Form	Form Category	Visit	Visit Details	Sequence	Center	Primary Disease	Earliest	Due	Complete	Completed By
DUE		2021-07-16	2000	Other CPI	Baseline				HEMOGLOB	2021-07-16	2021-09-14		
DUE		2021-01-26	2000	Other CPI	Baseline				HL	2021-01-26	2021-03-27		
DUE		2020-08-22	2000	Other CPI	Baseline				MDS	2020-08-22	2020-10-21		

Last modified: Mar 08, 2024

3.5.2. Disease Codes

Below is a reference table for the Primary Disease values used in Recipient Center Forms Due.

Disease Code	Disease Label
AA, SAA	Aplastic Anemia
AI	Autoimmune Disease
ALL	Acute lymphoblastic leukemia
AML_ANLL, AML	Acute myelogenous leukemia
BCELL LYMPHOPROLIF	B cell lymphoproliferative disorder
CARDIOVAS_DIS	Cardiovascular disease
CML	Chronic myelogenous leukemia
CPV	Cardio and peripheral vascular disease
GVHD PROPHYLAXIS	GVHD prophylaxis
GVHD_TREATMNT	GVHD treatment
HEMA	Hemophilia A
HEMB	Hemophilia B
HEMOGLOB	Hemoglobinopathies
HIS	Histiocytic disease
HL	Hodgkin lymphoma
IBMFS	Inherited Bone Marrow Failure Syndromes
IEA	Inherited abnormalities of erythrocyte differentiation or function
IIS	Disorders of the immune system
IMD	Inherited disorders of metabolism
IMMUNE RECONST	Immune reconstitution
INFECT_TRTMT	Infection treatment
INF PROPHYLAXIS	Infection prophylaxis
IPA	Inherited platelet abnormalities
MALIG HEMAT DISO	Malignant hematologic disorder, NOS
MDS	Myelodysplastic disease

MPN	Myeloproliferative diseases
MUS	Musculoskeletal disease
NEU, NEUR DIS	Neurological disease
NHL	Non Hodgkin lymphoma
NONMALIG DISO	Non-malignant disorder, NOS
OAL	Other acute leukemia
OCULAR_DIS	Ocular disease
OMHD	Other malignant hematologic disorder
OND, OTH or OTHR	Other disease
OTH LEUK	Other leukemia
PCD	Multiple Myeloma/Plasma cell disorder
PNH	Paroxysmal nocturnal hemoglobinuria
PREVENT_DIS_RELAPS	Prevent disease relapse
PROMOTE STEMCELL ENGRAFT	Promote stem cell engraftment
PULMON_DIS	Pulmonary disease
RDEB	Recessive dystrophic epidermolysis bullosa
RELAPS_PERSIS_PROGRES	Relapsed, persistent or progressive disease
STU	Solid tumors
SUBOPT_DNR_CHIM	Suboptimal donor chimerism
TIASOT	Tolerance induction associated with solid organ transplant

Last modified: Mar 08, 2024

3.5.3. Creating a CPI Forms Due List

Run a Recipient CPI List for Forms Due

Centers will need to generate two lists using the FormsNet3 Center Forms Due tool, one to look for critical forms that are due in the current trimester and a second to look for all forms with due dates in the previous CPI trimester. Instructions are included below for both lists.

Critical Forms by Due Date

✿ **CPI Requirement:** Current Trimester – Completion rate of 95% required to achieve CPI standard. Must be completed by DUE DATE noted in FormsNet3 during the current trimester.

1. Select the critical forms from the list:
 - a. Click the Unselect All icon (empty box with yellow star) to clear the default selections
 - b. Select the Critical Forms from the list (F2006, F2400, F2402, F2814)
2. Select the “incomplete” Status Codes:
 - a. Click the box with the red exclamation point above the box of status codes
 - b. Unselect QRY (Query) status (*Queries are tracked differently*)
3. Select the CPI Period:
 - a. Your center’s location (US or Non-US) should be selected by default
 - b. Select **Due Now**. The start and end date will populate with the dates for the Current Trimester.
4. (Optional): Filter by Donor/Infusion Type
 - a. If nothing is selected, the search will ignore these fields.
5. Click Search
6. Additional filters and sorting can be applied to the result set if desired. Reference Center Forms Due for instructions on customizing the results grid.
7. Export to Excel, if desired, by clicking the button in the top left of the results set.

Forms with Due Dates in the Previous Trimester

✿ **CPI Requirements:**
-Critical Forms – Completion rate of 98% required to achieve CPI standard. Includes all forms that were due in the previous trimester.
-100% completion of study supplemental forms with DUE DATE in previous trimester (allows for an extra trimester to complete all study forms)
-95% completion of all other forms due in previous trimester

1. Select CPI Forms:
 - a. Click the box with the red exclamation point above the box of forms
2. Select the “incomplete” Status Codes:

- a. Click the box with the red exclamation point above the box of status codes
 - b. Unselect QRY (Query) status (Queries are tracked differently)
3. Select the CPI Period:
 - a. Your center's location (US or Non-US) should be selected by default.
 - b. Select Due in Previous Period. Start and End date will populate with the dates for the Previous Trimester.
4. (Optional): Filter by Donor/Infusion Type
 - a. If nothing is selected, search will ignore these fields.
5. Click Search * system defaults to Due date with past due dates showing at the top
6. Additional filters and sorting can be applied to the result set if desired. Reference Center Forms Due for instructions on customizing the results grid.
7. Export to Excel, if desired, by clicking the button in the top left of the results set.

All CPI forms and all time points that are due

1. Select CPI Forms:
 - a. Click the box with the red exclamation point above the box of forms
2. Select the "incomplete" Status Codes:
 - a. Click the box with the red exclamation point above the box of status codes
 - b. Unselect QRY (Query) status (Queries are tracked differently)
3. Select the CPI Period:
 - a. Your center's location (US or Non-US) should be selected by default.
 - b. Select the **blank field** in the CPI Period drop down menu. Start and End dates will remain blank.
4. (Optional): Filter by Donor/Infusion Type
 - a. If nothing is selected, search will ignore these fields and generate all infusion types.
5. Click Search (System defaults to Due date with past due dates showing at the top)
6. Additional filters and sorting can be applied to the result set if desired. Reference Center Forms Due for instructions on customizing the results grid.
7. Export to Excel, if desired, by clicking the button in the top left of the results set.

Additional Resources:

[CPI Forms and Due Dates](#)

Last modified: Mar 08, 2024

3.5.4. Forms Completed by User List

Run a List of Forms Completed by User

Centers often request details on **recipient** forms completed at their center. This information can be generated in FormsNet3 using the Center Forms Due tool by following these instructions.

1. Select the forms of interest from the list:
 - a. Click the Unselect All icon (empty box with yellow star) to clear the default selections
 - b. Click the Select All icon (green checkbox) to select all forms
2. Select the “completed” Status Codes:
 - a. Click the Unselect All icon (empty box with yellow star) to clear the default selections
 - b. Select AUD , CMP, LCK, PND and QRY status codes.
3. Verify that the Completed By Column is selected to display in your results.
4. Click Search.
5. Additional filters and sorting can be applied to the result set if desired. Reference Center Forms Due for instructions on customizing the results grid.
6. Export to Excel, if desired, by clicking the button in the top left of the results set.



These directions are specific to **RECIPIENT** forms completed at your center.

Last modified: Mar 08, 2024

4. Recipient Tab

Last modified: Sep 21, 2021

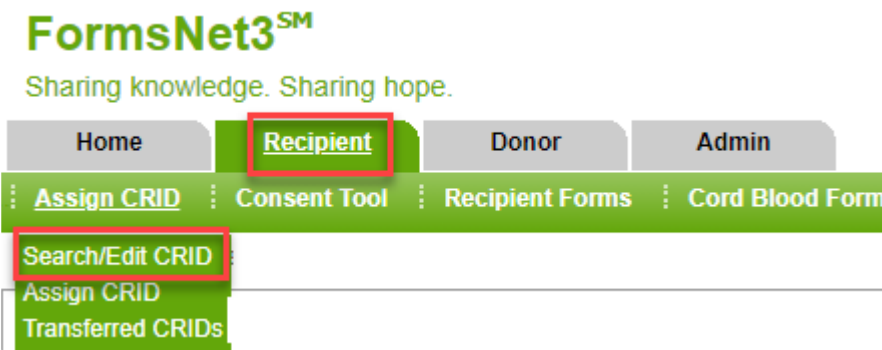
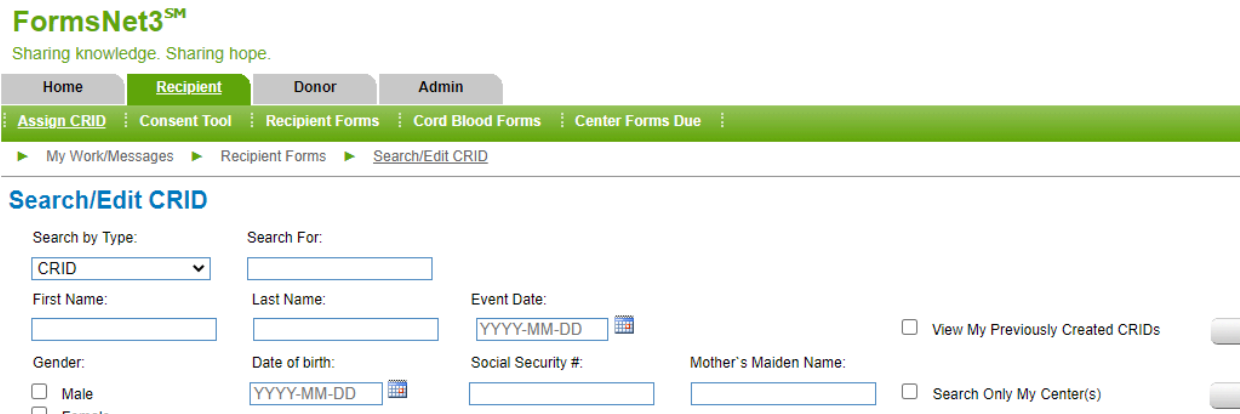
4.1. Search for a CRID

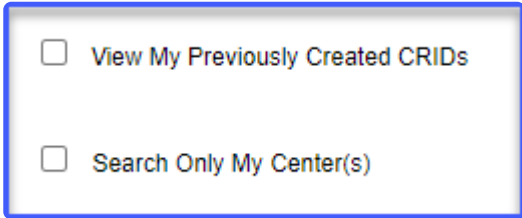
What is a CRID?

The CIBMTR Research ID (CRID) is a unique identifier assigned when an individual is registered with the CIBMTR as receiving a cellular therapy, including hematopoietic stem cell transplant (HCT), treatment for marrow toxic injuries, and certain non-cellular therapies. The CRID Assignment Form 2804 collects the information required to create a lifelong identification number specific to an individual, and certain data fields are used to ensure that the same individual does not inadvertently receive multiple CRID assignments.

Performing a CRID Search

Before assigning a new CRID, you must ensure that your recipient does not have a previous CRID assignment by performing a CRID search.

<ul style="list-style-type: none"> Click on Assign CRID in the Menu Bar, under the Recipient tab Click on Search/Edit CRID from the dropdown list. 	 <p>The screenshot shows the FormsNet3 SM interface. The top navigation bar has tabs for Home, Recipient, Donor, and Admin. The Recipient tab is active, and a dropdown menu is open showing options: Assign CRID, Consent Tool, Recipient Forms, and Cord Blood Form. The 'Assign CRID' option is highlighted with a red box.</p>
<ul style="list-style-type: none"> Enter the known private identifying data completely and accurately in the search fields in the search fields of the 	 <p>The screenshot shows the FormsNet3 SM interface with the 'Search/Edit CRID' form. The form includes the following fields and options:</p> <ul style="list-style-type: none"> Search by Type: A dropdown menu with 'CRID' selected. Search For: A text input field. First Name: A text input field. Last Name: A text input field. Event Date: A date input field with a calendar icon, showing 'YYYY-MM-DD'. Gender: Radio buttons for Male and Female. Date of birth: A date input field with a calendar icon, showing 'YYYY-MM-DD'. Social Security #: A text input field. Mother's Maiden Name: A text input field. View My Previously Created CRIDs: A checkbox. Search Only My Center(s): A checkbox.


<p>Search/Edit CRID screen.</p> <ul style="list-style-type: none">Click on Search. Up to 25 potential matches will display based on search criteria entered. <p>By filling in as much information as you know of the private identifying data, you reduce the quantity of possible matches.</p>	
<ul style="list-style-type: none">The boxes “View previously created CRIDs” or “Search Only My Center(s)” (screenshot at right) will <u>only</u> display the CRIDs created by the current username, or <u>only</u> your	 <p>The screenshot shows a rectangular box containing two checkboxes. The first checkbox is labeled "View My Previously Created CRIDs" and the second checkbox is labeled "Search Only My Center(s)". Both checkboxes are currently unchecked.</p>

center.
Those
filters are
useful
when
looking for
a CRID that
you know
was done
by you or
your center
when no
other
identifying
data is
available.

- **Do not check those boxes** when verifying whether or not your patient has a previously assigned CRID from a different center than your own, because it could eliminate the one you are looking for.

No CRIDs found for your search criteria

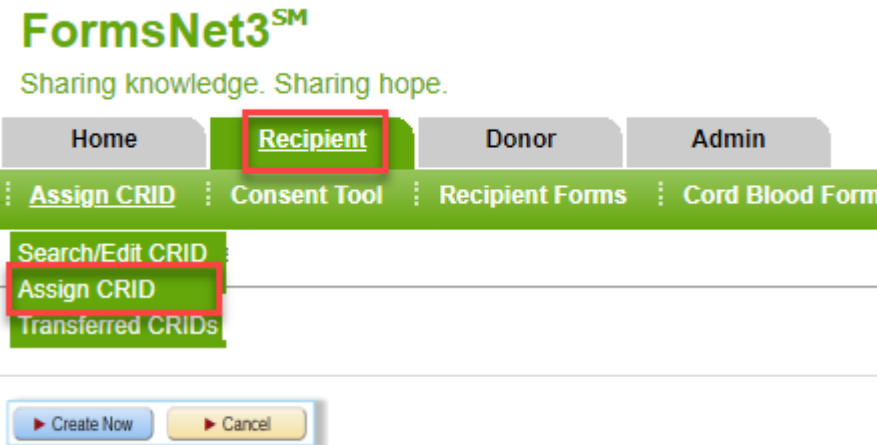
If there is no match, try less criteria. Once you are satisfied that the recipient never had a prior CRID, you can give your recipient a new CRID assignment.

CRID(s)															
	CRID	NMDP RID	IUBMID/Team	Registry ID	Event	Indication Type	First Name	Last Name	DOB	Gender	Disease Code	Center	Center Name	Created	User
No CRIDs found for your search criteria.															
Page 0 of 0															
No items to display															

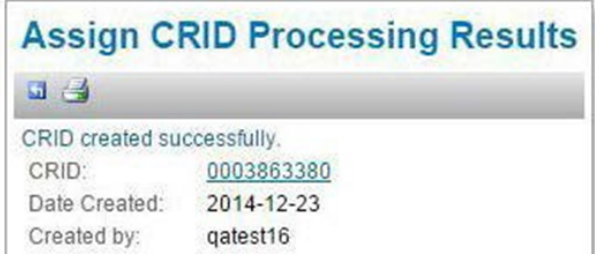
Last modified: Sep 21, 2021

4.2. Create a CRID

Assigning a new CRID

<ol style="list-style-type: none"> 1. Click on Assign CRID in the Menu Bar, under the Recipient tab. 2. Click on Assign CRID from the dropdown list. 3. Complete the CIBMTR Recipient ID Assignment Form. 	 <p>FormsNet3SM Sharing knowledge. Sharing hope.</p> <p>Home Recipient Donor Admin</p> <p>Assign CRID Consent Tool Recipient Forms Cord Blood Form</p> <p>Search/Edit CRID Assign CRID Transferred CRIDs</p> <p>Create Now Cancel</p>
<ol style="list-style-type: none"> 4. Click Create Now at the bottom of the screen. 	

Confirmation

<p>When the CRID is created successfully, you'll get confirmation with the new CRID number.</p>	 <p>Assign CRID Processing Results</p> <p>CRID created successfully.</p> <p>CRID: 0003863380</p> <p>Date Created: 2014-12-23</p> <p>Created by: qatest16</p>
---	--

Editing the CRID Assignment

After the CRID is assigned and submitted to CIBMTR, if data needs to be corrected, most corrections related to the CRID can be done directly in FormsNet3 by the data manager.

<p>Search/Edit CRID screen of Form 2804</p> <ol style="list-style-type: none"> 1. Click the Edit Form icon (see screenshot to the right) from the column to the left of the CRID for your 	 <p>Search/Edit CRID</p> <p>CRID: 0003483288</p> <p>First Name: Last Name: Event Date: YYYY-MM-DD</p> <p>Gender: Male Female</p> <p>Date of Birth: YYYY-MM-DD Social Security #: Mother's Maiden Name:</p> <p>CRID(s)</p> <table border="1"> <thead> <tr> <th>CRID</th> <th>NMDP RID</th> <th>IUEMID/Team</th> <th>Event</th> <th>First Name</th> <th>Last Name</th> <th>DOB</th> </tr> </thead> <tbody> <tr> <td>0003483288</td> <td></td> <td></td> <td>2012-08-01</td> <td>Jane</td> <td>Doe</td> <td>2012-10-</td> </tr> </tbody> </table>	CRID	NMDP RID	IUEMID/Team	Event	First Name	Last Name	DOB	0003483288			2012-08-01	Jane	Doe	2012-10-
CRID	NMDP RID	IUEMID/Team	Event	First Name	Last Name	DOB									
0003483288			2012-08-01	Jane	Doe	2012-10-									

patient.
2. Make any
changes
needed.
3. Click Save
Now to save
the changes
made to the
form.

Last modified: Mar 08, 2024

4.3. Editing the CRID Assignment (2804)

Editing the CRID Assignment (2804)

After the CRID is assigned and submitted to CIBMTR, if data needs to be corrected, most corrections related to the CRID can be done directly in FormsNet3 by the data manager.

Search/Edit CRID screen

1. Click the Edit Form icon
2. Make any changes needed
3. Click Save Now (in the form) to save the changes made



Search/Edit CRID

CRID:

First Name:

Last Name:

Event Date:

Gender: ☐ Male ☐ Female

Date of Birth:

Social Security #:

Mother's Maiden Name:

CRID(s)

CRID	NMDP RID	IJBMD/Team	Event	First Name	Last Name	DOB
0003483288			2012-08-01	Jane	Doe	2012-10-

Last modified: Mar 08, 2024

4.4. Reporting Data for NMDP Products

Reporting Data for NMDP Products

CIBMTR disables several fields on data collection forms when a NMDP Product is used, because those data can be obtained directly from NMDP. However, in order to use the NMDP data, CIBMTR needs to have sufficient details to match to the NMDP records. This linking is accomplished by using the NMDP RID in FormsNet and matching the infusion dates.

Adding NMDP RID to FormsNet:

1. On the Recipient Tab, click the Search/Edit CRID option (top left of menu bar)
2. Search for the CRID
3. Click the Edit Icon next to the CRID to edit F2804
4. Add the NMDP RID (Q14)
5. Scroll down and click Save
6. You may be prompted for additional information on this form like race and ethnicity – answer these questions to the best of your ability to save the update.
7. If you have already submitted a 2400 for this patient, you'll need to resubmit that form to get the RID update to autopopulated on that form.



All completed forms should be re-submitted to ensure auto-populated data are updated.

Last modified: Mar 08, 2024

4.5. Transfer Tool

A recipient transfer may be necessary when there is a recipient who has been or will be at a second center. Check to see if a transfer is needed when you:

- Get a match when searching a new recipient's name
- Get a warning about a possible duplicate CRID when registering a new recipient
- Know there is a recipient coming to your center from another center
- Know a recipient is going to another center
- Know a recipient has had a previous transplant elsewhere

Last modified: Sep 21, 2021

4.5.1. Initiating a Transfer

A transfer may be initiated by either center.

On the **Search/Edit CRID** screen

1. Enter the CRID or known demographic information of the recipient that needs to be transferred and click Search.
 - a. If multiple results are returned and you are unsure about which CRID is the correct one, please contact [CIBMTR Center Support](#).

2. On the row of the CRID that the user wants to transfer, click the initiate transfer icon.

CRID	NMDP RID	IUBMID/Team	Registry ID	Event	Indication Type	First Name	Last Name	DOB	Gender	Disease Code	Center	Center Name
					Cellular therapy							

3. If the user that initiated the transfer is at the same center that the recipient is currently registered at, the user will need to select the center that the recipient is transferring TO.
 - a. The user will be able to enter the known center information to bring back a list of centers that meet the search criteria.
 - b. Select the center that the patient is transferring to and click the 'Select' button.

Recipient Transfer

CRID:
 Date of Birth:
 FROM Center:
 TO Center: [Select center](#)

[▶ Submit](#) [▶ Return to Search/Edit CRID](#)

Select center

Center Number: Center Name: City:
 State: Country:

Center Number	Center Name	City	State	Country
<input type="radio"/>			MN	UNITED STATES
<input type="radio"/>			MN	UNITED STATES
<input type="radio"/>			MN	UNITED STATES
<input type="radio"/>			MN	UNITED STATES
<input type="radio"/>			MN	UNITED STATES

Page 1 of 1 1 - 5 of 5 items

[▶ Select](#) [▶ Cancel](#)

4. If the user is at the new center, i.e. the center the recipient is transferring TO, then the FROM Center and TO center information will already be completed.
 - a. Note: If the user has access to multiple centers, then the user will need to select from the list of centers that the user has access at.
5. Once the FROM center and TO center both have center information, click the 'Submit' button and this will initiate the transfer. An email that contains the contact information for the other center will be sent to the user that initiated the transfer, as well as to the primary data managers at both centers.
6. If the initiate transfer icon was incorrectly clicked, the user can click the 'Return to Search/Edit CRID' button, and no transfer will be initiated.

Recipient Transfer

CRID:
 Date of Birth:
 FROM Center:
 TO Center:

[▶ Submit](#) [▶ Return to Search/Edit CRID](#)

Last modified: Sep 21, 2021

4.5.2. Completing the Transfer

Completing the Recipient Transfer Request

After the center has been contacted and the transfer has been discussed, the recipient transfer request can be completed in FormsNet3. The center where the recipient is transferring TO, will need to complete their section of the transfer first.

A new grid, **Transfer Tasks**, has been created in FormsNet3 on the My Work/Messages page. A row will appear within the Transfer Tasks grid anytime a CRID is either transferring from your center or being transferred to your center.

If the row appears in **YELLOW**, this means that completion of the transfer is required at your center. There will also be an icon available in the left-most column. If the row appears in **LIGHT GREY**, the transfer is pending completion from the other center, and if the row appears in **BLUE** it is pending completion from CIBMTR.

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CIBMT
CENTER FOR INTERNATIONAL & MARROW TRANSPLANT RESEARCH


Home Recipient Admin

My Work/Messages My Profile

My Work/Messages

My Work

Transfer Tasks

Transfer Status	CRID	Event	From Center	To Center	Updated	User
Pending CIBMTR confirmation					2021-06-30	qatest14
 Pending TO center					2021-05-04	qatest18
Pending TO center					2021-05-04	qatest18
Pending FROM center					2021-05-24	qatest18

When the transfer is pending completion from your center, select the icon to open the transfer request. There are two sections to the transfer request:

<p>1) TO Center Data, completed by the center the recipient is transferring TO.</p>	<h3>Recipient Transfer</h3> <p>CRID: Date of Birth: FROM Center: TO Center:</p> <p>TO Center Data 1</p> <p>Confirmed recipient with transferring FROM Center: <input type="checkbox"/></p> <p>Agreed upon effective date: (date the transferring TO center assumes responsibility for recipient) <input type="text"/></p> <p>Was a duplicate CRID created at your center: <input type="radio"/> Yes <input type="radio"/> No</p> <p>Duplicate CRID: <input type="text"/></p> <p>Reason for transfer:</p> <p><input type="radio"/> Center closed</p> <p><input type="radio"/> Center split / merged</p> <p><input type="radio"/> Follow-up care</p> <p><input type="radio"/> Subsequent infusion</p> <p>Date of subsequent infusion: <input type="text"/></p> <p>Data Manager agrees that their center will assume reporting responsibility: <input type="checkbox"/></p>
<p>2) FROM Center Data, completed by the center the recipient is transferring FROM.</p>	<p>FROM Center Data 2</p> <p>Confirmed recipient with transferring TO Center: <input type="radio"/> Yes <input type="radio"/> No</p> <p>Comment: <input type="text"/></p> <p>Agreed to effective date: (date the transferring TO center assumes responsibility for recipient) <input type="radio"/> Yes <input type="radio"/> No</p> <p>Proposed effective date: <input type="text"/></p> <p>Data Manager agrees that reporting responsibility is transferring to TO Center: <input type="checkbox"/></p>

▶ Submit
▶ Return to My Work
▶ Cancel Transfer

The section that is applicable for your center will be enabled and the other section will appear greyed out and the user will not be able to edit it.

Complete all questions within the section and select the 'Submit' button. There are validations built into the tool to ensure data quality. Instructions for how to complete the questions are available within the [Data Management Guide](#).

View Affected Forms

There is a hyperlink '[View affected forms](#)' that will display for both centers once an effective date is reported. This allows users at both centers to view which forms will stay at the initial center and which forms will move to the new center based on the effective date reported.

TO Center DataConfirmed recipient with transferring FROM Center: ☒

Agreed upon effective date: (date the transferring TO center assumes responsibility for recipient)

2021-06-30

[View affected forms](#)Was a duplicate CRID created at your center: ☐ Yes ☒ No

Affected Forms				
Forms that will stay at center				
Status	Form	Event	Visit	Visit Details
CMP	2814	2021-06-30	Indication	
1 - 1 of 1 items				
Forms that will be moved to center				
Status	Form	Event	Visit	Visit Details
DUE	2400	2021-06-30	Pre-TED	
DUE	2402	2021-06-30	Pre-TED	
1 - 2 of 2 items				

If the Centers Do Not Agree

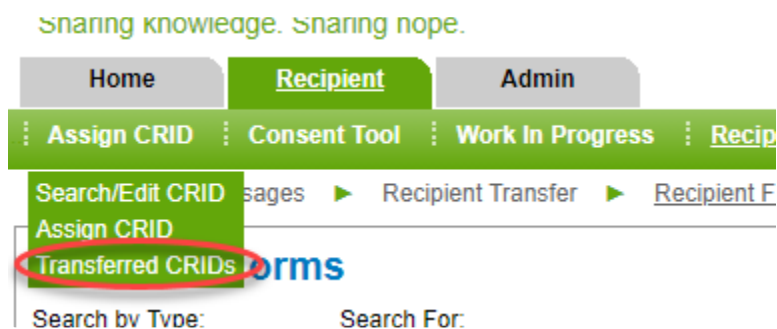
Once the transferring TO center completes their section, the request will move to the transferring FROM center. If the transferring FROM center does not agree with the information reported by the transferring TO center, that can be indicated, and the request will be sent back to the transferring TO center. The request will move back and forth between the centers until both centers agree on the information reported for the transfer.

After Both Centers Complete Their Section

After both centers have completed their sections the transfer will occur immediately in FN3, if a duplicate CRID has not been reported. If a duplicate CRID has been reported the transfer request will move to a status of 'Pending CIBMTR Confirmation'. CIBMTR staff will review the transfer request and handle the duplicate CRID before the transfer is processed. In either case, once the transfer has been completed an email will be sent to both centers' primary data managers, as well as any other user that submitted information during any part of the transfer.

Transferred CRIDs

Once the transfer has been completed, the CRID will be removed from the Transfer Tasks grid and will be available within a new page, 'Transferred CRIDs'. (Select Recipient tab > Assign CRID > Transferred CRIDs)



This grid will show all CRIDs that have been transferred, either TO or FROM your center, as well as any CRIDs that had their transfer cancelled.

Transferred CRIDs

Export to Excel

Transfer Status	CRID	Event	From Center	To Center
Transfer Completed				
Transfer Completed				
Transfer Completed				
Transfer Completed				
Transfer Completed				
Transfer Completed				
Transfer Completed				
Transfer Completed				

On the 'Transferred CRIDs' grid, the user will be able to select the magnifying glass icon to view the information of the transfer, if needed, any time after the transfer has been completed. There is also a hyperlink available on the CRID, that when clicked will bring the user to that recipient's forms due grid.

On the recipients form page, if a CRID is currently in the process of being transferred there will be a hyperlink 'Status of Transfer'. Clicking this hyperlink will bring the user to the Transfer Tasks grid for that recipient.

Recipient Forms

Search by Type: Search For:

CRID

[Consent Tool](#) [Status of Transfer](#)

Recipient Information

If the CRID has previously had a transfer completed or canceled, a hyperlink 'Transfer History' will appear. Clicking this hyperlink will bring the user to the Transferred CRIDs grid for that recipient.

Recipient Forms

Search by Type: Search For:

[Consent Tool](#) [Transfer History](#)

Recipient Information

CRID	Event	Study Name	NMDP RID

Page 1 of 1

Forms

Last modified: Mar 08, 2024

4.5.3. Exiting a Transfer

Exiting a Transfer

If the user has opened the transfer request and is not ready to complete the questions, select the 'Return to My Work' button. If any data has been entered and the 'Return to My Work' button is selected, the data will not be saved.

Recipient Transfer

CRID:

Date of Birth:

FROM Center:

TO Center:

TO Center Data

Confirmed recipient with transferring FROM Center: ☒

Agreed upon effective date: (date the transferring TO center assumes responsibility for recipient)

2021-07-01



[View affected forms](#)

Was a duplicate CRID created at your center: ☐ Yes ☒ No

Duplicate CRID:

Reason for transfer:

- ☐ Center closed
- ☐ Center split / merged
- ☒ Follow-up care
- ☐ Subsequent infusion

Date of subsequent infusion:

Data Manager agrees that their center will assume reporting responsibility: ☒

► Submit

► Return to My Work

► Cancel Transfer

Last modified: Sep 21, 2021

4.5.4. Canceling a Transfer

Canceling a Transfer

If a transfer has been initiated but your center is unable to accept the transfer, the '[Cancel Transfer](#)' button should be selected.

Recipient Transfer

CRID:

Date of Birth:

FROM Center:

TO Center:

TO Center Data

Confirmed recipient with transferring FROM Center: ☐

Agreed upon effective date: (date the transferring TO center assumes responsibility for recipient)

Was a duplicate CRID created at your center: ☐ Yes ☐ No

Duplicate CRID:

Reason for transfer:

- ☐ Center closed
- ☐ Center split / merged
- ☐ Follow-up care
- ☐ Subsequent infusion

Date of subsequent infusion:

Data Manager agrees that their center will assume reporting responsibility: ☐

▶ Submit

▶ Return to My Work

▶ Cancel Transfer

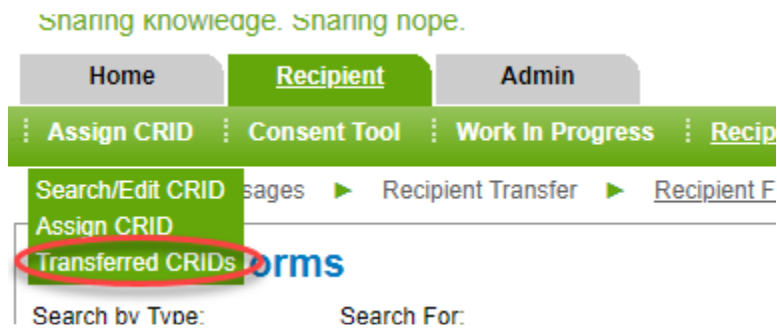
Selecting the '[Cancel Transfer](#)' button will require a comment indicating why the transfer cannot be completed. Once that is submitted, the transfer will be cancelled, and the recipient will remain at the initial center.

System Message

The transfer has been canceled. This recipient will remain at the current center and will not be transferred.

After the transfer is cancelled, if information is needed regarding the cancelled transfer in the future, this

can be found within the [Transferred CRIDs](#) page (Select Recipient tab > Assign CRID > Transferred CRIDs).



Transfers that have been cancelled will appear with a status of 'Transfer Cancelled by FROM/TO/CIBMTR' depending on who cancelled the transfer. Selecting the magnifying glass will allow the user to view the information submitted before the transfer was cancelled.

Transferred CRIDs

Export to Excel					
Transfer Status	CRID	Event	From Center	To Center	
Transfer Cancelled by FROM center					
Transfer Cancelled by TO center					
Page 1 of 1					1 - 2 of 2 items

Last modified: Mar 08, 2024

4.6. Error/Query Report

Error/Query Report

An Error/Query Report is generated for any form submitted with unresolved errors, any overridden errors, or has a query. Click on the Error/Query Report icon located in the form track row in the first column of the grid. It will open to the error report for that form.

Error report icon:



1 2 3 4 5 6 7 8 9 10 ... ▶▶										
	Status	NMDP/RID	IUBMID/Team	EBMTID	Event	Form	Visit	Group	Sequence	Ea
	ERR	930-423-9	BW0409/396		2012-07-02	3003	AE FU-41	2	6159626	20
	MOD	930-423-9	BW0409/396		2012-07-02	3003	AE FU-40	1	6159627	20

To resolve an error, the user must open the form in EDIT mode. Try to determine what caused the error to generate. Many of the fields have an unknown, not reported, or not tested response that could be used as reasons for the error. If that is the case, please enter a response instead of overriding the question. If all the known options are exhausted, then it's acceptable to use the override codes. Also enter an explanation about the error in the comment box. Then click 'Save Now' and the error will be resolved.

To resolve a query, please view the Queries section for details.

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[Home](#) [Recipient](#)



[Assign CRID](#) [Work In Progress](#) [Recipient Forms](#) [Center Forms Due](#)

[My Work/Messages](#) [Recipient Forms](#) [Center Forms Due](#) [Form Edit 2120](#) [Error Report](#) [Error Report](#)

Form 2046 R3.0: Fungal Infection Pre-HSCT Date

CRID: [0003860535](#) Visit: **Baseline** Status: **ERR**
 Sequence Number: **6713188** Center: **10002**
 Event Date: **2007-09-11** Received Date: **2013-05-21**

Form Errors

Page 1 of 1

Err #	Q #	Inst	Question Text	Answer	Rel Q #	Rel Question Text	Rel Answer	Error Message
1		1	Other product					Any of ("Marrow", "PBSC", "Cord blood") must be answered
2	1	1	Aspergillus					"Q1 - aspergillus" must be answered
3	16	1	Fusarium					"Q16 - fusarium infection" must be answered
4	27	1	241 Mucormycosis					"Q27 - mucor infection" must be answered

*Screenshot of an Error Report

Last modified: Sep 21, 2021

4.7. Queries

Last modified: Nov 01, 2021

4.7.1. Query Basics

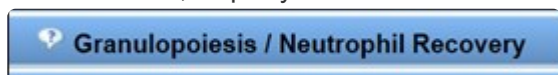
Queries in Recipient Forms

A query is a feature in FormsNet3 that gives CIBMTR the ability to apply a data check to a specific field.

Query Icon & Indicator

Open Query

- Within a form, a query indicator directs a user to the section title under which the query is located:



Queries are denoted with a query icon

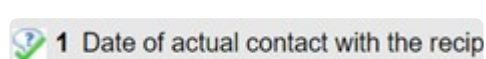
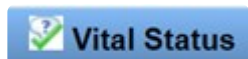


- This label is found to the left of the question number and/or question text:

A small, light blue speech bubble icon containing a white question mark, followed by the text "2 Sex". Below this, there are two radio button options: "male" and "female". The "female" option is selected, indicated by a blue dot.

Addressed Queries

- Query indicator and query icon will have a green check mark through them:



Query Definitions

Word / Phrase	Definition
Query	Individual data check on a field
Queried Form	A form that has at least one query within it. One form can have multiple queries within it.
Query Comment	Comment placed by CIBMTR that explains what should be reviewed or attached
Unresolved Query	Query that has not been approved.
Rejected Query	After CIBMTR reviewed center's response to a query, the response was not sufficient to resolve the issue/request. The form will return to QRY status.
Approved Query	After CIBMTR reviewed center's response to a query, the response was sufficient to resolve the issue/request. The form will go to CMP status.
Query Status (QRY)	Form status that indicates the form has unresolved queries. Center action is required.
Pending Status (PND)	Form status that indicates a center has responded to data check and that CIBMTR should review.
Complete Status (CMP)	Form status that indicates all queries and errors are resolved.
Error Status (ERR)	Form status that indicates unresolved potential corrections that need to be resolved by center so form can go to complete status.

FormsNet3 Forms: Editable vs. Non-Editable (PDF)

When resolving a query, the process described in the next section 'How to Resolve a Query' pertains to FormsNet3 editable forms only

- FN3 editable forms are designated with red pen on a paper icon
- Non-FN3 editable forms are designated with a PDF icon
- In rare cases, a query may be placed on a PDF form. These PDF forms will need to be updated with an Error Correction Form (ECF). Once completed, you'll want to submit the error correction form via a CIBMTR Center Support ticket. Most ECFs can be found here: [CIBMTR Data Collection Forms](#).

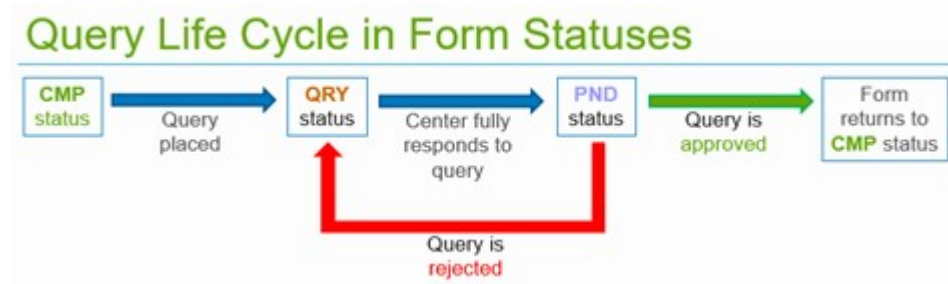
FN3 Editable

Not FN3 Editable

Forms with a PDF icon still require an error correction form (ECF).

Query Life Cycle in Form Statuses

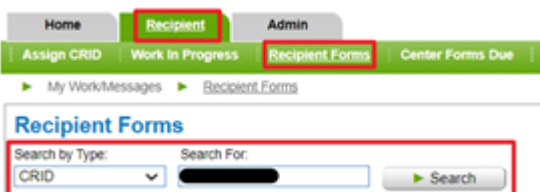

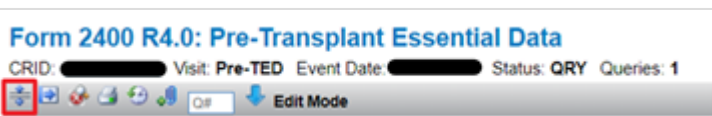
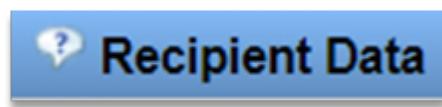
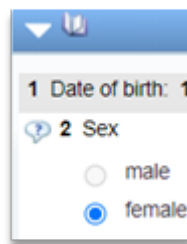
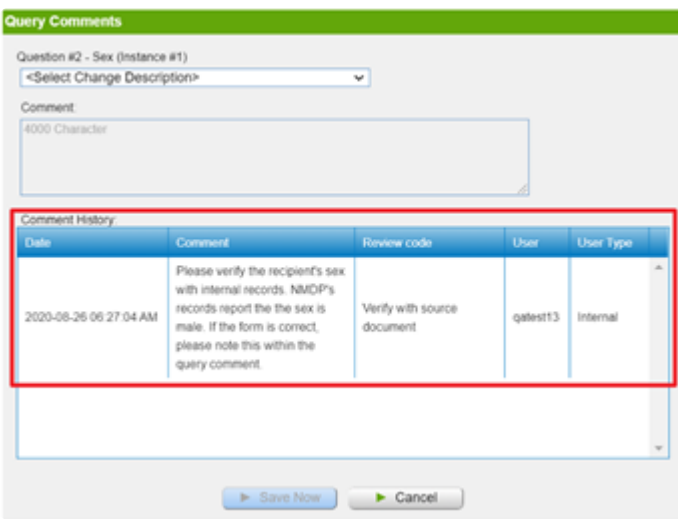
Overview of a query's life cycle summarized using form status & action taken to move the form to different statuses:

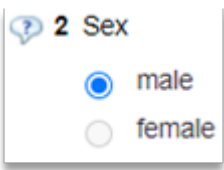
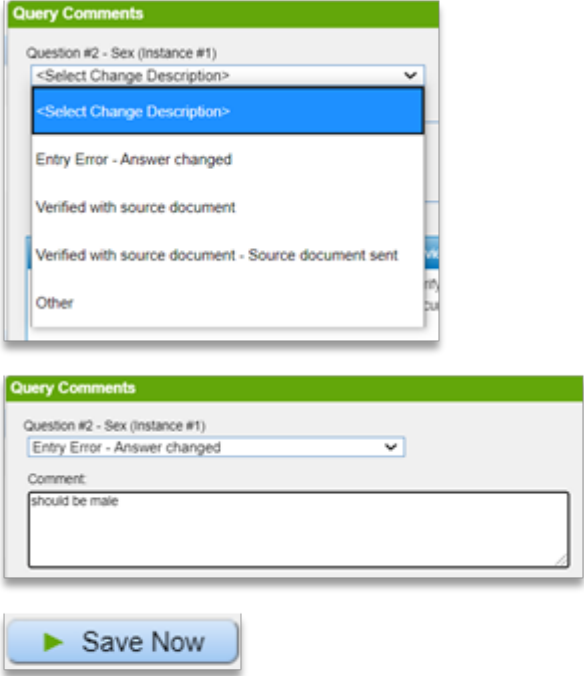
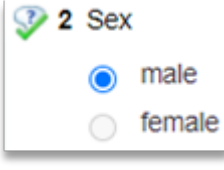
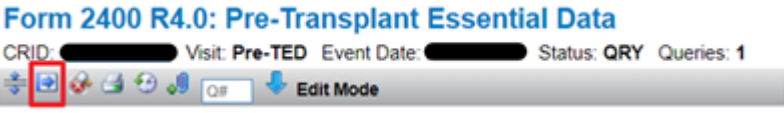
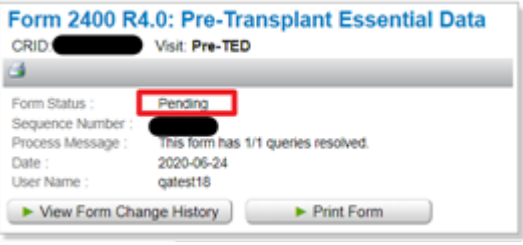


Last modified: Mar 08, 2024

4.7.2. How to Resolve a Query

How to Resolve a Query (step-by-step)

1. Navigate to the queried form within the Recipient Forms page											
2. Select edit form											
3. Collapse all sections											
4. Locate the section name with a query indicator & open section											
5. Locate question(s) with a query											
6. Click the query icon to see query comment (what CIBMTR is asking you to review/do)	 <table><tr><th>Date</th><th>Comment</th><th>Review code</th><th>User</th><th>User Type</th></tr><tr><td>2020-08-26 06:27:04 AM</td><td>Please verify the recipient's sex with internal records. NMDP's records report the the sex is male. If the form is correct, please note this within the query comment.</td><td>Verify with source document</td><td>qatest13</td><td>Internal</td></tr></table>	Date	Comment	Review code	User	User Type	2020-08-26 06:27:04 AM	Please verify the recipient's sex with internal records. NMDP's records report the the sex is male. If the form is correct, please note this within the query comment.	Verify with source document	qatest13	Internal
Date	Comment	Review code	User	User Type							
2020-08-26 06:27:04 AM	Please verify the recipient's sex with internal records. NMDP's records report the the sex is male. If the form is correct, please note this within the query comment.	Verify with source document	qatest13	Internal							

<p>7. Exit pop-up and update answer/complete action</p>	
<p>8. Interact with query icon a. Select option from dropdown b. Add a comment c. Click Save Now</p>	
<p>9. A successfully addressed query will now have a green check mark</p>	
<p>10. Select the submit form icon</p>	
<p>11. Before re-submitting the form, check for new potential correction errors. When finished, submit the form.</p>	
<p>12. Ensure form went to PND status</p>	
<p>13. CIBMTR will then review the query and either: a. Approve the query => Form will go to</p>	

<p>CMP status & query will be resolved b. Reject the query => Form will return to QRY status and data manager will follow steps 1-13 until query is approved.</p>	
--	--

Last modified: Nov 01, 2021

4.7.3. Run a CPI List for Queries

From My Work (FN3 Landing Page)

Recipient Query Tasks is the 2nd grid that displays in FN (under Transfer Tasks). This grid will display all queries for your center that are waiting for a response from you.



CPI Requirement: 95% completion of queries placed in the previous trimester
See the [Form Completion Standards](#) page of the Data Management Guide for more information.

To filter for the queries that are counted for CPI, follow these instructions:

1. Select the filter icon on the Updated column.
2. Change the top dropdown to Is after for equal to
3. Use the date picker to select the start of the Previous CPI trimester (see below).
4. Leave the middle dropdown set to AND
5. Change the bottom dropdown to Is before for equal to
6. Use the date picker to select the end of the Previous CPI trimester (see below).
7. Click Filter.

For US Centers, assessment trimesters are:

- January 1 – April 30
- May 1 – August 31
- September 1 – December 31

For Non-US Centers, assessment trimesters are:

- March 1 – June 30
- July 1 – October 31
- November 1 – February 28

Last modified: Mar 08, 2024

5. Donor Tab

Last modified: Sep 21, 2021

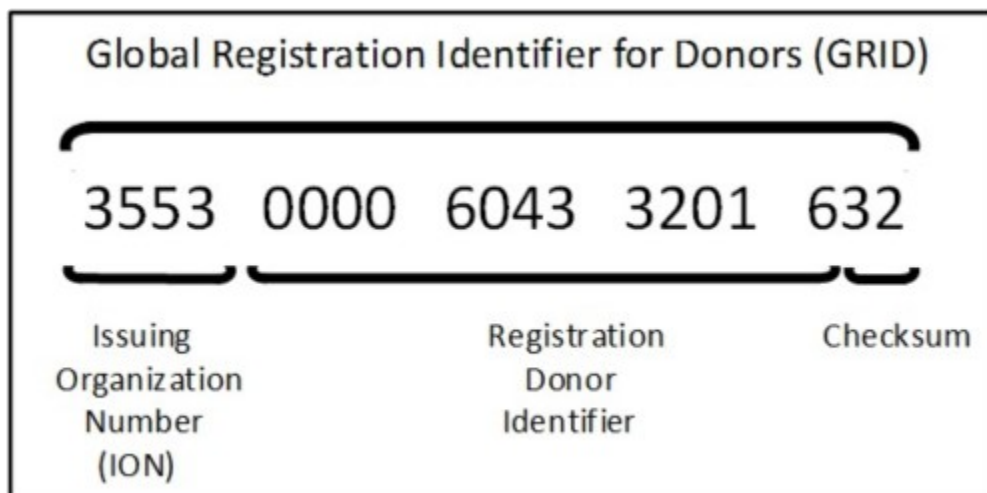
5.1. Search for a GRID

What is a GRID?

The Global Registration Identifier for Donors (GRID) is a 19-character identifier composed of three elements:

1. A 4-digit Issuing Organization Number (ION) – NMDP ION is 3553
2. A 13-character Registration Donor Identifier (RDI) assigned by the issuing organization
3. A 2-digit checksum – a calculated number that ensures the preceding 17 digits are accurate and not mistyped

GRID breakdown:



Searching via GRID

- On all pages within the Donor tab, the default search method is via GRID
- Search via the 19-character GRID for each donor

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Home Recipient **Donor** Admin Define Form

Donor Forms Work In Progress Center Forms Due

My Work/Messages Donor Forms

Donor Forms

Search by Type Enter ID

GRID 3553000030346725226 Search

in the “Enter ID” section

- Example of a successful search

Donor Forms

Search by Type Enter ID

GRID

3553000030346725226

Search

CT info

	Donor ID	Registry Donor ID	GRID	Recipient ID	Coop Code	DC	TC
	3034-6725-2		3553 0000 3034 6725 226	530-540-7		67	503
	3034-6725-2		3553 0000 3034 6725 226	530-540-7		67	503
	3034-6725-2		3553 0000 3034 6725 226	530-540-7		67	503

Donor Information

Export to Excel

	Center #	AC/CC	RID	TC#	Sat. ID	PE Date	IPE (1)	IPE (2)	IPE (3)	Product	Inject Start	Coll. (1)	Coll. (2)	LTDU
	067	9806	530-540-7	503		2021-06-24				PBSC	2021-07-15	2021-07-19		
	067	9781	530-540-7	503						DLI				

Forms

Export to Excel

	Status	Donor ID	Registry Donor ID	GRID	Pri. Ctr	Sec. Ctr	Sequence #	Form ID	Visit ID	Event Date	Earliest Complete Date	Due Date	Receive Date	Complete Date
	DUE	3034-6725-2		3553 0000 3034 6725 226	067			55	Donor IDM	2021-05-21	2021-05-21	2021-06-04		
	CMP	3034-6725-2		3553 0000 3034 6725 226	067	9806	10054827	55	Donor IDM	2021-06-24	2021-06-24	2021-07-08	2021-06-25	2021-06-25
	CMP	3034-6725-2		3553 0000 3034 6725 226	067	9806	10074250	55	Donor IDM	2021-07-12	2021-07-12	2021-07-26	2021-07-13	2021-07-13
	ERR	3034-6725-2		3553 0000 3034 6725 226	067	9806	2314181	700	Physical Exam	2021-06-24	2021-06-24	2021-06-29		

Last modified: Mar 08, 2024

5.2. Queries

See the sections below for more information about queries in the Donor tab:

- [Queries](#)
- [How to Resolve a Query](#)

Last modified: Mar 04, 2024

5.2.1. Query Basics

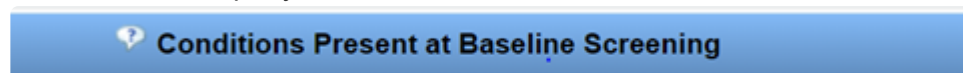
Queries in Donor Forms

A query is a feature in FormsNet3 that gives CIBMTR the ability to apply a data check to a specific field.

Query Icon & Indicator

Open Query



Within a form, a query indicator directs a user to the section title under which the query is located:



Queries are denoted with a query icon:



This label is found to the left of the question number and/or question text:

 13 Injection site reaction (filgrastim, IV, or marrow collection): 



☒ Not applicable

☐ None (grade 0)

☐ Pain; itching; erythema (grade 1)

Addressed Queries


Query indicator and query icon will have a green check mark through them:

 13 Injection site reaction (filgrastim, IV, or marrow collection): 

☒ Not applicable

☐ None (grade 0)

☐ Pain; itching; erythema (grade 1)

 Conditions Present at Baseline Screening

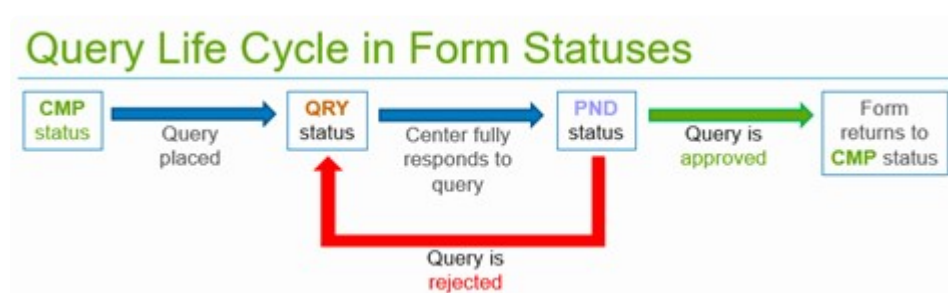
Query Definitions

Word/Phrase	Definition
Query	Individual data check on a field
Queried Form	A form that has at least one query within it. One form can have multiple queries
Query Comment	Comment placed by CIBMTR that explains what should be reviewed or attached
Unresolved Query	Query that has not been approved
Rejected	After CIBMTR reviewed center's response to a query, the response was not sufficient to

Query	resolve the issue/request. The form will return to QRY status
Approved Query	After CIBMTR reviewed center's response to a query, the response was sufficient to resolved the issue/request. The form will go to CMP status
Query Status (QRY)	Form status that indicates the form has unresolved queries. Center action is required
Pending Status (PND)	Form status that indicates a center has responded to data check and that CIBMTR should review
Complete Status (CMP)	Form status that indicates all queries and errors are resolved
Error Status (ERR)	Form status that indicates unresolved potential corrections that need to be resolved by center so form can go to complete status

Query Life Cycle in Form Statuses

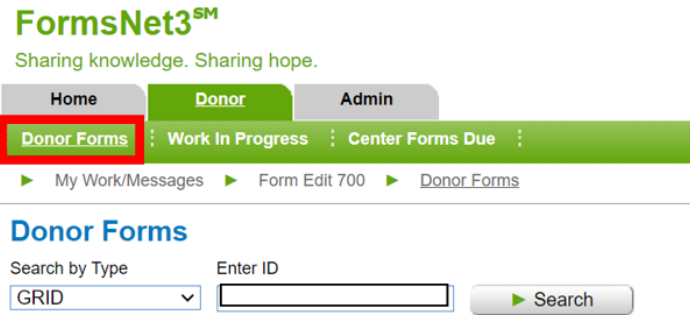

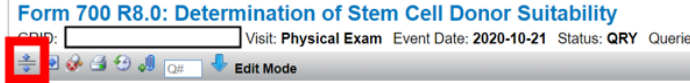

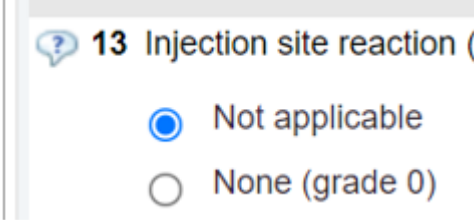
Below is an overview of a query's life cycle summarized using form status & action taken to move the form to different statuses



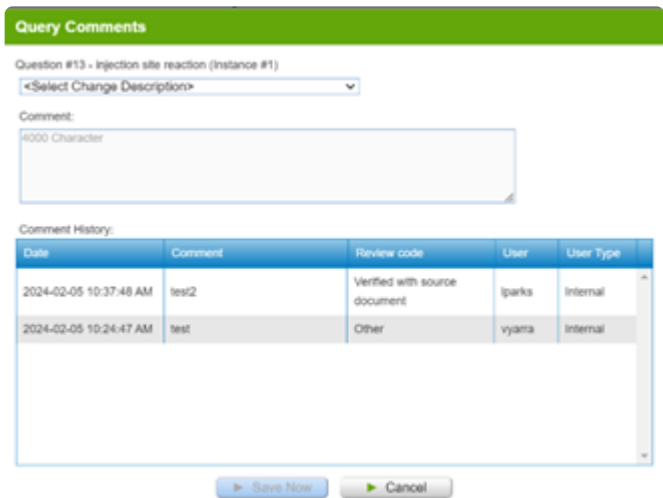
Last modified: Mar 04, 2024

5.2.2. How to Resolve a Query

How to Resolve a Query (step-by-step)

<p>1. Navigate to the queried form within the Donor Forms page</p>	 <p>FormsNet3SM Sharing knowledge. Sharing hope.</p> <p>Home Donor Admin</p> <p>Donor Forms Work In Progress Center Forms Due</p> <p>My Work/Messages Form Edit 700 Donor Forms</p> <p>Donor Forms</p> <p>Search by Type Enter ID</p> <p>GRID <input type="text"/> <input type="button" value="Search"/></p>
<p>2. Select edit form</p>	
<p>3. Collapse all sections</p>	 <p>Form 700 R8.0: Determination of Stem Cell Donor Suitability</p> <p>GRID: <input type="text"/> Visit: Physical Exam Event Date: 2020-10-21 Status: QRY Queried</p> <p><input type="button" value="Edit Mode"/></p>
<p>4. Locate the section name with a query indicator and open section</p>	
<p>5. Locate question(s) with a query</p>	 <p>13 Injection site reaction (</p> <p><input checked="" type="radio"/> Not applicable</p> <p><input type="radio"/> None (grade 0)</p>

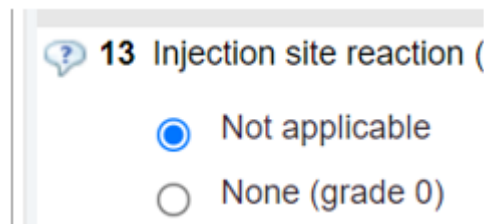
6. Click the query icon to see query comment (what CIBMTR is asking you to review/do)



The 'Query Comments' form has a green header. It contains a dropdown menu for 'Question #13 - Injection site reaction (Instance #1)' with the selected option '<Select Change Description>'. Below this is a 'Comment:' text area with a '4000 Character' limit. A 'Comment History:' table is also present, showing two entries. At the bottom are 'Save Now' and 'Cancel' buttons.

Date	Comment	Review code	User	User Type
2024-02-05 10:37:48 AM	test2	Verified with source document	lparks	Internal
2024-02-05 10:24:47 AM	test	Other	vyama	Internal

7. Exit pop-up and update answer/complete action (if you need, change the reported answer)



A question card for '13 Injection site reaction ('. It features a blue question mark icon and two radio button options: 'Not applicable' (which is selected) and 'None (grade 0)'.

Last modified: Mar 04, 2024

6. Upstream CRID

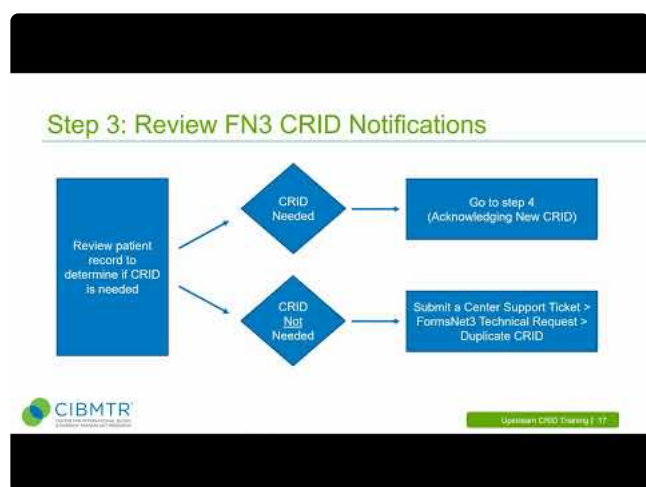
What is Upstream CRID?

Upstream CRID is a new process in which NMDP patient demographics and infusion information is sent from an application called MatchSource, directly to FormsNet3. This information will automate the process of creating a new CRID, when needed.

Last modified: Mar 08, 2024

6.1. Eligibility Requirements

- Currently limited to US Centers
- Center must have a one-to-one relationship between NMDP TC and CIBMTR center
 - Centers with separate CIBMTR numbers for adults/pediatrics, or other program splits, will be eligible in the future as the functionality expands
- Center must address outstanding data quality (DQ) issues related to NMDP linkings/IDs
- Center must “opt-in” and complete required training. **All FormsNet3 users with access to create CRIDs must...**
 - Watch the [Upstream CRID eLearning](#)
 - Review the information in the [Upstream CRID](#) section of the FormsNet3 Training Guide
 - Complete the post-training [knowledge check](#)
 - Once all users have completed the training and passed the knowledge check, the center's Primary Data Manager must submit a [CIBMTR Center Support](#) ticket (Upstream CRID > Upstream CRID Opt-In) in order to have this functionality turned on at the center. Within the ticket, *please also provide the names of all staff members who have completed the training.*



<https://www.youtube.com/embed/e0wdLRNS0Aw?rel=0>

Last modified: Mar 08, 2024

6.2. Process Overview

Step 1: NMDP Infusion Information Sent to FormsNet3

Completed automatically by MatchSource

When a marrow, PBSC (peripheral blood stem cell), or cord blood product is ordered from NMDP, MatchSource can send patient and infusion details to FormsNet3 to register the patient and report the infusion

- When infusion date has passed, patient information sent from MatchSource to FormsNet3 automatically overnight in “batch” process and it is used to update an existing CRID or create a new one

✿ **Tip for Success:** Develop a process with the transplant coordinator to be informed of any upcoming transplants (including NMDP RID)

Step 2: The Matching Process

Completed automatically by FormsNet3

FormsNet3 will use matching logic and attempt to identify an existing CRID and respond accordingly by either updating the existing CRID or creating a new one based on “match type”

- **Perfect Match** = Birthdate + Sex + NMDP RID **or** First Name + Last Name + Birthdate + Sex + Center
 - If a “perfect match” is found to an existing CRID, FormsNet3 will link the patient identifiers to MatchSource and no new CRID will be created
- **Fuzzy Match** = Potential match is found, but does not meet “perfect match” criteria
 - New CRID is created and logged as a “fuzzy match”
- **No Match** = FormsNet3 creates a new CRID with the information from MatchSource

✿ **Tips for Success:**

1. If it is known that an existing patient will be having a subsequent infusion using an NMDP product, adding the NMDP RID to FN3 before the infusion occurs will prevent duplicate CRIDs
2. Use consistent naming conventions and exact dates of birth

Step 3: FormsNet3 Notifications

Completed by Data Managers

When CRIDs are created through the Upstream process, FN3 will display a notification on the **My Work**

landing page with an acknowledgement link that will take user to the Search/Edit CRID page

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Home Recipient Donor Admin

My Work/Messages My Profile

My Work/Messages

My Work

CRIDs created by MatchSource

There have been new CRIDs created by MatchSource. There has been 9 new CRID(s) created at CCN
 There have been new CRIDs created by MatchSource. There has been 1 new CRID(s) created at CCN
 There have been new CRIDs created by MatchSource. There has been 4 new CRID(s) created at CCN

Please acknowledge these CRIDs [here](#)
 Please acknowledge these CRIDs [here](#)
 Please acknowledge these CRIDs [here](#)

- Results will be pre-filtered to CRIDs requiring acknowledgement

To use Search/Edit CRID normally, unselect the “unacknowledged” filter

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Home Recipient Donor Admin

Assign CRID Consent Tool Work In Progress Recipient Forms Center Forms Due

Search/Edit CRID

Search by Type: CRID

Search For:

First Name: Last Name: Event Date:

Sex: ☐ Male ☐ Female Date of birth: Social Security #: Mother's Maiden Name:

☒ Unacknowledged MatchSource CRIDs

☐ View My Previously Created CRIDs

☒ Search Only My Center(s)

CRID(s)	CRID	CRID acknowledged	NMDP RID	IUBMID/Team	Registry ID	Institution Specific ID	Event	Indication Type	First Name	Last Name	DOB	Sex
<input type="checkbox"/>	0003906890	No	559-395-2				2022-11-13	Hematopoietic Cell Transplant	FN-retest	Test-td-FNretest	2022-10-31	Male
<input type="checkbox"/>	0003906908	No	559-396-0				2022-11-13	Hematopoietic Cell Transplant	Test-td-	Test-td-retest	2022-10-31	Male



Centers will need to review patients record to determine if a CRID was needed. If so, proceed to step 4. If **NOT**, submit a [Center Support Ticket](#) > FormsNet3 Technical Request > Duplicate CRID

Step 4: Acknowledging New CRIDs

[Completed by Data Managers](#)

Select the checkbox and click “Acknowledge CRID”

Search/Edit CRID

Search by Type: Search For:

First Name: Last Name: Event Date:

Sex: ☐ Male ☐ Female Date of birth: Social Security #: Mother's Maiden Name:


☒ Unacknowledged MatchSource CRIDs ☐ View My Previously Created CRIDs

☒ Search Only My Center(s)

CRID(s)	CRID	CRID acknowledged	NMDP RID	IUBMD/Team	Registry ID	Institution Specific ID	Event	Indication Type	First Name	Last Name
<input checked="" type="checkbox"/>	0003906890	No	559-395-2				2022-11-13	Hematopoietic Cell Transplant	FN-retest	Test-td-FNretest
<input type="checkbox"/>	0003906908	No	559-396-0				2022-11-13	Hematopoietic Cell Transplant	Test-td-	Test-td-re
<input type="checkbox"/>	0003907047	No	559-405-9				2022-11-13	Hematopoietic Cell Transplant	Richard	Bachman
<input type="checkbox"/>	0003907781	No	551-565-8				2022-11-25	Hematopoietic Cell Transplant	J5515658	S5515658

Page 1 of 1

- This will enable all features for the selected CRIDs
- If **more than 25 CRIDs** are pending acknowledgement, user will need to acknowledge and refresh the page to view additional results

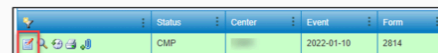
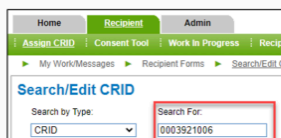
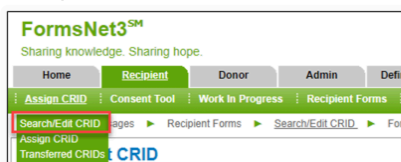
 **Tip for Success:** CRID acknowledgement should be completed regularly (at least weekly) to ensure all CRIDs are addressed before forms are considered past due

Step 5: Completion of F2814

Completed automatically in FormsNet3

For all MatchSource infusions, whether a new CRID was created or not, FormsNet3 will have inserted and attempted to complete a F2814 (Indication for CRID Assignment)

- Verify **infusion date** is accurate
- If information is incorrect, edit the F2814 using the same process as FormNet3-created CRIDs
 - Assign CRID > Search/Edit CRID > Search for CRID number > Edit Icon for F2814



F2400 and F2402 will come due

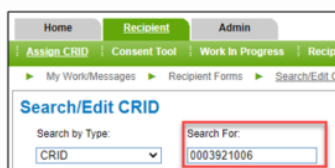
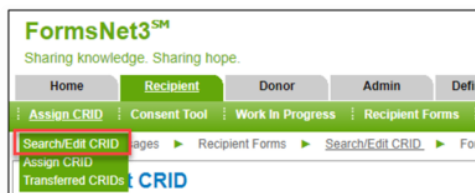
- If this is a first infusion, **consent status** will need to be provided **prior to** completing F2400 and F2402
 - *You will not be able to complete F2400 and F2402 until consent status is updated*
- If extra forms are created and are not needed (such as due to cancellation or delay of infusion), submit [CIBMTR Center Support ticket](#)
 - This process should be followed for any additional forms that come due and are not necessary

Step 6: Updating CRIDS in FormsNet3 (If Necessary)

Completed, if necessary, by Data Managers

If patient details were incorrect or incomplete, update CRID (F2804) using same functionality as FormsNet3-created CRIDs

- Assign CRID > Search/Edit CRID > Search for CRID number > Edit Icon



! CRIDs must be acknowledged **BEFORE** they can be edited

Last modified: Mar 08, 2024

6.3. Cancellation and Opting Out

Cancellation

- If planned infusions are cancelled, inform NMDP of the cancellation prior to the infusion date
- If infusion did not occur, create and complete an on demand F2008 (Infusion Cancelled or Delayed)

The screenshot shows the 'Recipient Forms' interface. At the top, there is a search section with 'Search by Type:' set to 'CRID' and a 'Search For:' field. Below this is a 'Consent Tool' section with a 'Create Indication Form' button. The main section is 'Recipient Information', which contains a table. The table has columns for 'CRID', 'Event', and 'Study Name'. A red box highlights the 'Add' icon (a plus sign in a square) in the first row of the table, and a red arrow points to it from the left. The table shows one row with a CRID, a date '2022-01-10', and a study name. At the bottom, there is a pagination bar showing 'Page 1 of 1'.

Opting Out

- If at anytime a center determines that this process is not working well for staff, submit a [CIBMTR Center Support](#) ticket (Upstream CRID > Upstream CRID Opt-Out) to have this functionality turned off
 - All CRIDs will be required to be reported and manually created in FormsNet3
- CIBMTR will continually monitor for issues and contact centers with any concerns

Last modified: Mar 08, 2024

7. Admin Tab

The screenshot shows the FormsNet3 Admin Tab interface. At the top, there are three tabs: Home, Recipient, and Admin. Below the tabs is a green bar with the text "Security Toolset". A breadcrumb trail shows the navigation path: My Work/Messages > Recipient Forms > Center Forms Due > Form Edit 2100 > Form Edit 2149 > Forr. The main content area is titled "SecurityToolset" and contains several sections: "LDAP Group" with a dropdown menu, "Users" with a dropdown menu, "User Roles" with a list of roles and checkboxes, and "User Role Functions" with a list of functions. A "Save Changes" button is located below the User Roles section.

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Home Recipient **Admin**

Security Toolset

My Work/Messages Recipient Forms Center Forms Due Form Edit 2100 Form Edit 2149 Forr

SecurityToolset

LDAP Group

Select the group of users you wish to administer

Users

Select the user you wish to Add/Remove Roles

User Roles

Select the roles you wish to Add/Remove from the user by checking or unchecking the check box(s)

Save Changes

User Role Functions

Security Toolset

The Security Toolset is only accessible by the center's Primary Data Manager or Primary Coordinator. There can only be one assigned CIBMTR Primary Data Manager per center. This screen is used to assign or remove security roles for staff that use FormsNet3. The LDAP Group dropdown lists all the LDAP groups for the logged in Primary Data Manager.

To add/remove security roles





- Select a center from the LDAP Group dropdown. User Roles applicable to that center type will display.
- Under the Users dropdown, users in that particular LDAP group will populate.
- Select the user who needs security roles edited.
- To add a role to the selected user, click on the check box in front of User Role.
- To remove a role from the selected user, click on the green checkmark.
- Click Save.

View User Role Functions

A user's role is assigned to them by the Primary Data Manager/Primary Coordinator. They display under the User Role Functions header.

Expand the display of User Role Functions by clicking the plus/minus sign before the role title to see what

functions are associated with the role.

User Role Functions	
	FN3_REC_DATA_MANAGER
	FN3_HM_ACCESS_MY_WORK
	FN3_HM_VIEW_MESSAGES_RECIPIENT
	FN3_REC_ACCESS_ASSIGNCRID
	FN3_REC_ACCESS_RECIPIENT_CENTER_FORMS_DUE
	FN3_REC_ACCESS_WORK_IN_PROGRESS
	FN3_REC_EDIT_AE_FORMS_ENTRY
	FN3_REC_EDIT_CELLULAR_THERAPY
	FN3_REC_EDIT_CLASSIC_FORMS
	FN3_REC_SET_LTF
	FN3_REC_VIEW_AE_FORMS
	FN3_REC_VIEW_CELLULAR_THERAPY
	FN3_REC_VIEW_CLASSIC_FORMS
	FN3_REC_VIEW_MED_MON_FORMS

Last modified: Sep 21, 2021

8. Glossary

Glossary

Auto-population

When a specific value is known, it will cause other fields on forms to automatically fill without requiring data entry. Errors on the initial source will repeat on future forms. If an error is noted, the source fields must be corrected.

Breadcrumbs

This feature shows the path of screen changes that the user took in the application since logging in. These screen changes, separated by (>) brackets, display at the top of the current screen. Clicking on a breadcrumb will navigate to that screen.

CRID

CIBMTR Research ID is a secure identification number that is assigned to each recipient upon their first infusion by using the CRID tool in the FormsNet3 application. The CRID number will always remain the same on all CIBMTR forms for this recipient.

Potential CRID Duplicates

A CRID that has several data points that match an already existing CRID. Potential duplicates will be displayed on the processing page after the user has created a CRID.

Disabled Field

A field that is not available for data entry due to the answer of a previous question.

Enabled Field

A field on the form that is available for data entry.

Events and Actions

Upon form submission, answers to certain fields trigger emails and/or specific forms to come due for completion.

Expand or Collapse

Each section in a form can be expanded or collapsed depending on how the user would like to view the form. This allows the ability to view section bars as open with all questions displaying (expanded) or closed with just the section bar showing (collapsed).

Field

Each question on a form consists of one or more spaces where data is entered.

Field Change History

If a user changes the answer to a question on a form that was previously submitted, a pop-up box will appear next to the changed field. The user must select a reason code to explain why the answer was changed before navigating away from that field.

Field icons

Appear to the left of the question number within a form and are based on the answer given to that question. They indicate the question status, examples: error, locked.

Form Track Row

Each form will have a designated row within any Forms grid. The row allows the user to access the action icons and view overall details for each form.

Form Status

The form status indicates to the user the progression of the form. The current status of the form is displayed on the Forms Grid.

GRID

The World Marrow Donor Association (WMDA) is requiring an updated global standard for donor identification; WMDA collaborated with ICCBBA to develop and implement a Global Registration Identifier for Donors (GRID).

Lost to Follow-up

When the Recipient or Donor Center is unable to provide follow-up data, on a visit by visit basis, for a required time point, they can be declared as Lost to Follow-up.

LDAP / LDAP GROUPS

Lightweight Directory Access Protocol (LDAP) is a Microsoft program which functions as the directory management service for CIBMTR. Data Managers use the same LDAP username to enter several CIBMTR programs, including: FormsNet3, MatchSource, and SearchLink.

Non-Override Validation

Some fields have “non-override” validations that require an answer. If the answer does not meet the validation rule, an override code cannot be selected.

Override Code

When a field doesn't meet the validation rule, a reason code must be selected to describe why the validation rule was not met.

Question Enabling

Form questions are enabled based on answers to previous questions. This feature ensures that all appropriate questions within a form are being answered.

Quick Links

These hyperlinks are at the top of every screen. One click on a Quick Link takes you to another window or tab, without leaving your current screen.

Recipient Legacy Forms

Forms processed through NMDP and IBMTR-Milwaukee prior to December 2007 are referred to as Legacy Forms. Forms that were processed in the original FormsNet2 are viewable in FormsNet3. Legacy forms are still used by both our internal staff and external network.

Save (Saving)

The system automatically saves each field as it is entered and you leave the field.

Submit

Formerly known as "Process", now the "Submit" button is the final icon to click on to send the data to the CIBMTR database.

Validation

Rules that check for accuracy of data entered into the system. These rules look for acceptable data entry responses, words, or number ranges for each field to ensure the data is clean, correct, and useful.

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9. Contact Us

- NMDP Service Desk at (612) 362-3411 or (800) 526-7809 Ext. 3411
- Submit a question and/or issue via [CIBMTR Center Support](#), our customer service portal
 - If you do not have an account for CIBMTR Center support, please email centersupport@nmdp.org to create a ticket



Note: emailing a question or request typically takes longer than submitting a support ticket directly to CIBMTR Center Support as the emails are not automatically sent to the appropriate subject-matter experts.

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