Contents
Introduction ................................................................................................................................................. 3
Access .......................................................................................................................................................... 4
Navigation ................................................................................................................................................ 5
Home Tab ................................................................................................................................................... 6
Donor Forms ............................................................................................................................................... 7
  Form status and colors ............................................................................................................................ 10
  Inside of the Form .................................................................................................................................. 12
  On Forms Grid ....................................................................................................................................... 12
  Add Attachment ..................................................................................................................................... 12
  Identify forms that have attachments .................................................................................................... 13
  Opening an attached document ............................................................................................................. 14
  Deleting attached document .................................................................................................................. 14
  Attaching at the Donor ID level ............................................................................................................. 14
  Auto-populated fields ............................................................................................................................. 16
Recipient Tab ............................................................................................................................................. 17
  No CRIDs found for your search criteria ............................................................................................... 18
  Assigning a new CRID .............................................................................................................................. 18
  Confirmation .......................................................................................................................................... 18
  Editing the CRID Assignment form ....................................................................................................... 18
Recipient Forms ......................................................................................................................................... 20
  Form status and colors ............................................................................................................................ 21
  Query Icon & Indicator ............................................................................................................................ 23
  Definitions (specific to queries) ............................................................................................................ 23
  Pre-requisite: How to resolve a query ..................................................................................................... 24
  Query Life Cycle in Form Statuses ........................................................................................................ 24
  How to resolve a query (step-by-step) .................................................................................................... 25
  Guidelines when attaching a document .................................................................................................. 27
  Identify forms with attachments ........................................................................................................... 29
  Opening an attached document ............................................................................................................ 29
  Deleting an attached document ............................................................................................................ 29
  Attaching at the CRID level .................................................................................................................... 30
Validation .................................................................................................................................................... 32
  Collapse all - Expand all Sections ........................................................................................................... 34
  Submit .................................................................................................................................................... 34
  Clear Form ............................................................................................................................................ 35
  Cancel Form ......................................................................................................................................... 35
  Print ...................................................................................................................................................... 35
  Jump to Question .................................................................................................................................. 35
Center Forms Due ................................................................. 41
Admin Tab ............................................................................. 42
Glossary ............................................................................... 43
Introduction

FormsNet3<sup>SM</sup>

More than 99% of data collected by the CIBMTR is submitted electronically via FormsNet3<sup>SM</sup>, 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<sup>SM</sup> Donor Release Course, and under Category: Data Management, Title: FormsNet3<sup>SM</sup> 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

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

Google chrome

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.
Access

Logging in

Go to: https://formsnet3.nmdp.org

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

Click on **Log off** (upper right screen corner) whenever you leave your desk to keep data private.

You will see **Signed Off** as confirmation.

Note: **FormsNet will log off automatically after 20 minutes of Inactivity and you will need to login again.**
Navigation

The following are basic navigation definitions:

- Tabs
- Menu Bar
- Breadcrumbs
- Moving around a form

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. The screen shot below shows that the user is currently in the My Work/Messages screen of the Home tab.

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 Within 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.
Home Tab

On the Home tab:
- Access forms in progress
- Set personal preferences
- Receive System and Recipient Center Messages

My Work
Once successfully logged into FormsNet3, the first screen is the My Work/Messages screen. My Work displays all of the forms that you have started, including their status: ERR (Error), SVD (Saved), MOD (Modification) and RVW (Review). You can access any of your forms in progress directly from the My Work grid. In addition to the forms started by you, all forms in query status at your center(s) will display in the My Work grid.

Setting personal preferences
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 that 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 whether to display colors in your grids.
- Choose the number of records that you want to see in grids at one time.
- Click on Submit to save your changes.

Messages

CIBMTR will occasionally post news about the FormsNet3 system in the messages box located on the right side of the Home screen. Check here often.
Donor

On the Donor tab:

- Performing a DID Search
- Search Work in Progress
- Search Center Forms Due

What is DID?
DID is an acronym for Donor Identification. The DID is a secure identification number that is assigned to each donor upon their registration with the NMDP.

Performing a DID Search

- Under the Donor Tab, Enter DID in the Menu Bar.
- Click on Search.
- The “Donor Information” and “Forms” grid will display for this DID.

Search for forms that you started (Work in Progress)

- Under the Donor tab, click on Work in Progress in the menu bar.
- Select My work in progress from the User dropdown.
- Click Search.

Search for forms that anyone started from your center(s)

- Under the Donor tab, click on Work in Progress in the menu bar.
- Select Center(s) work in progress from the User dropdown.
- Choose your center by clicking the box in front of the name.
- Check each box that corresponds with centers that you are authorized to view.
- Click Search.
Select All ✓ icon above the Centers list box to select all centers with one click. Unselect All ☑ icon above the Centers list box to remove all centers with one click.

The system displays forms that meet the criteria that you selected in the Forms grid. You can access any form in that grid based on your security permission.
Donor Forms

Donor Forms:
- Search for a Donor Form
- Create an Unscheduled Form
- Form Status
- Form Change History
- Error Report
- Attachment Feature
- Lost to Follow-up
- Auto-population

Search for a Donor Form
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.

1. **Donor Tab > Donor Forms**: The Donor Forms screen will display. Click on one of the following, in the Search by Type dropdown list:
   - DID (default)
   - Sequence Number
2. After selecting Search by Type enter the correlating number in the field Search For.
3. Click on Search.

Data available for the search criteria you entered will populate in the Donor Information grid and also into the Forms grid.

Create an Unscheduled form
You can access a list of available unscheduled forms from within the Donor Information Grid. Click on the Unscheduled Form icon to see which forms are available.

A pop-up box saying Create Unscheduled Form will appear. 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.

If you change your mind, you can click the Cancel button. When the system returns to the Donor Forms screen, your original search criteria will be retained.

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, 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:
Form status and colors

<table>
<thead>
<tr>
<th>PURPOSE</th>
<th>COLOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form has not been started</td>
<td>DUE</td>
</tr>
<tr>
<td>Form is complete</td>
<td>CMP</td>
</tr>
<tr>
<td>Form has errors</td>
<td>ERR</td>
</tr>
<tr>
<td>Form saved</td>
<td>SVD</td>
</tr>
<tr>
<td>Form in sign status</td>
<td>SGN</td>
</tr>
<tr>
<td>Form modified</td>
<td>MOD</td>
</tr>
<tr>
<td>Form is locked</td>
<td>LCK</td>
</tr>
<tr>
<td>Form is locked for audit purposes</td>
<td>AUD</td>
</tr>
<tr>
<td>Form is Lost to follow-up</td>
<td>LTF</td>
</tr>
</tbody>
</table>

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 in the first column indicates a new form has been submitted or an update has occurred. Click on the icon to be navigated to the Form Change History of the specific form on the row that you selected.

Display information by Submitted or Username

- Click on the small triangle (>) in front of the word. Pointing to the right expands and pointing down (v) collapses the whole group at once.
- Next to the word Submitted is the date of submission. Clicking on that arrow expands or collapses a dropdown that shows who made submissions by their Username.
- Clicking on the arrow before Username expands the row and displays information entered by that User.

Clicking on the red ‘x’ will close the group. If you close in error and want to see the grouping again, use the return arrow in the Title bar or breadcrumbs to return to your previous screen.
Error report

An Error Report is generated for any form submitted with unresolved errors or any Donor Forms overridden errors. Click on the Error 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.

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.

Attachment feature

This feature will allow 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 will not be required. This feature is a way for users to easily and efficiently add a document to a form (ex. when lab values are significantly out of range, etc.). This will eliminate the need to fax/scan documents.

Guidelines when attaching a document:
- All identifying information on the document must be removed or obscured prior to attaching (i.e. patient name, DOB, social security number, address).
- Attached document must have NMDP DID clearly located on the document.
- At this time only pdf. documents can be attached and viewed.

There are several ways to attach an electronic document to a form in FormsNet3SM.
Inside of the Form
When opening a form in ‘Edit’ mode you will find a new icon on the menu bar. Simply click on the icon to begin.

On Forms Grid
After searching by DID or Sequence number you will find a new icon on the “Forms” grid for forms that have a status of SVD, ERR, MOD, CMP, AUD. Simply click on the icon to begin.

Add Attachment
After clicking on the ‘Add Attachment’ icon from either within the form or the Forms grid you will get a pop-up screen. ‘Select File’ will allow you to browse your computer to locate the file that you would like to attach. 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 that you can attach to a form.
Identify forms that have attachments

On the “Forms” grid you will now see a new icon showing a document(s) have been attached to the form. Clicking on the icon will populate the “Attachment” grid (found below the “Forms” grid) with the attached document(s). 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 paperclip icon found in the “Attachment” grid. The document will open in a new browser window.

Deleting 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 FormsNet 3 system.

Attaching at the Donor ID level
Documents can also be attached at the ID level by selecting the “Upload ID Level Attachment” button located in the Attachments grid. The steps for attaching a document at the ID level are the same as attaching a document at the form level.
Lost to Follow-up

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

The Lost to Follow-up icon only displays eligible forms and only if the form is in DUE status. Once the icon is clicked, the above dialog box displays. In order to proceed, you must select who is requesting this evaluation visit to be made lost to follow-up by clicking on the box in front of it.
- If you select “Donor Center” you will be asked to verify the attempts made to contact the donor.
- After a reason code is selected click on Submit Now, then the form status will change to LTF.
- If the form was started in error, submit a ticket via CIBMTR Center Support to reset the form. Once reset, you can proceed to make the form Lost to Follow-up electronically.
- 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, please submit a ticket via CIBMTR Center Support to change the form back to the 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.

Help

The Form 779 is designed to report donor withdrawal from further follow-up evaluations. A donor may withdraw from the follow-up evaluation process at any time. The donor center must speak directly to the donor or receive a written request from the donor to discontinue participation in the follow-up evaluation process. The form can be processed via FormsNet3SM by using the Unscheduled Form icon.
Auto-population
FormsNet3 will auto populate the key field sections on all forms. The name of the person completing the form and the date will auto-populate on all forms.

Auto-populated fields

<table>
<thead>
<tr>
<th>Sequence Number</th>
<th>Date Received</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donor NMDP ID</td>
<td>Recipient NMDP ID</td>
</tr>
<tr>
<td>DC Code</td>
<td>TC Code</td>
</tr>
<tr>
<td>Date of assessment/filgrastim administration</td>
<td>n/a filgrastim injection only</td>
</tr>
<tr>
<td>Date of Collection</td>
<td>Product Type</td>
</tr>
<tr>
<td>Date of Medical Evaluation</td>
<td>AC/CC Code</td>
</tr>
<tr>
<td>Visit ID, if applicable</td>
<td>Visit ID Year</td>
</tr>
<tr>
<td>User’s First and Last Name</td>
<td>User's date</td>
</tr>
</tbody>
</table>
On the Recipient Tab:
- Performing a CRID Search
- Assigning a new CRID
- Editing the CRID Assignment form
- Edit forms for an existing CRID from your center
- Search Work in Progress
- Search Center Forms Due

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.
- Click on Assign CRID in the Menu Bar, under the Recipient tab.
- Click on Search/Edit CRID from the dropdown list.
- Enter one or more of the known criteria in the search fields of the Search/Edit CRID screen.
- Click on Search. Up to 25 potential matches will display based on search criteria entered.

Enter the known private identifying data completely and accurately in the search fields, and then click on Search. By filling in as much information as you know of the private identifying data, you reduce the quantity of possible matches.

The boxes “View previously created CRIDs” or “Search Only My Center(s)” (screenshot at right) will only display the CRIDs created by the current username, or only your 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.

Assigning a new CRID

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.
4. Click Create Now at the bottom of the screen.

Confirmation

When the CRID is created successfully, you’ll get confirmation with the new CRID number.

Editing the CRID Assignment form

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 FormsNet by the data manager.

Search/Edit CRID screen of Form 2804

1. Click the Edit Form icon from the column to the left of the CRID for your patient.
2. Make any changes needed.
3. Click Save Now to save the changes made to the form.
Search for Work in Progress

- Under the Recipient tab, click on Work in Progress in the menu bar.
- Select My work in progress from the User dropdown.
- Click Search.

Search for forms that anyone started from your center(s)

- Under the Recipient tab, click on Work in Progress in the menu bar.
- Select Center(s) work in progress from the User dropdown.
- The center(s) you are authorized to view will appear in the centers box.
- Check each box that you want to view.
- Click Search.

Select All icon above the Centers list box to select all centers with one click. Unselect All icon above the Centers list box to remove all centers with one click.

The system displays forms that meet the criteria that you selected in the Forms grid. You can access any form in that grid based on your security permission.
Recipient Forms

In Recipient Forms:
- Search for a Recipient Form
- Create an Unscheduled Form
- Form Status
- Review Form Change History
- Error/Query Report
- Queries in Recipient Forms
- Attachment Feature
- Lost to Follow-up
- Survival Tool

Search for a Recipient Form
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.

1. Recipient Tab > Recipient Forms: The Recipient Forms screen will display. Click on one of the following, in the Search by Type dropdown list:
   - CRID (default)
   - NMDP RID
   - IUBMID/Team
   - EBMT ID
   - Sequence Number
2. After selecting Search by Type, enter the correlating number in the field Search For.
3. Click on Search.

Data available for the search criteria you entered will populate in the Recipient Information grid and into the Forms grid.

Create an Unscheduled form
You can access a list of available unscheduled forms from within the Recipient Information Grid. Click on the Unscheduled Form icon (🪄) to see which forms are available.

A pop-up box saying Create Unscheduled Form will appear. 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.

If you change your mind, you can click the Cancel button. When the system returns to the Recipient Forms screen, your original search criteria will be retained.
FormsNet3SM Training Guide

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:

Form status and colors

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form has not been started</td>
<td>DUE</td>
</tr>
<tr>
<td>Form is complete</td>
<td>CMP</td>
</tr>
<tr>
<td>Form has errors</td>
<td>ERR</td>
</tr>
<tr>
<td>Form saved</td>
<td>SVD</td>
</tr>
<tr>
<td>Form in sign status</td>
<td>SGN</td>
</tr>
<tr>
<td>Form has been modified</td>
<td>MOD</td>
</tr>
<tr>
<td>Form is locked</td>
<td>LCK</td>
</tr>
<tr>
<td>Form is locked for audit purposes</td>
<td>AUD</td>
</tr>
<tr>
<td>Form is Lost to follow-up</td>
<td>LTF</td>
</tr>
<tr>
<td>Form only has survival date reported</td>
<td>SUR</td>
</tr>
<tr>
<td>Query</td>
<td>QRY</td>
</tr>
<tr>
<td>Form is pending</td>
<td>PND</td>
</tr>
<tr>
<td>Form is locked for audit purposes; has open queries</td>
<td>AQR</td>
</tr>
<tr>
<td>Form is locked for audit purposes; has pending queries</td>
<td>APN</td>
</tr>
</tbody>
</table>

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 word. Pointing down expands and pointing 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.
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:

![Error Report Icon]

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 of 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.

*Screenshot of an Error Report*
Queries in Recipient Forms

A query is a feature in FormsNet 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.

Example:

Example of a queried field

Queries are denoted with a query icon (-question mark):

- This label is found to the left of the question number and/or question text.
- Example of a queried field

Addressed Query

- The query indicator & query icon will now have a green check mark through them.
- Example of a successfully interacted with query indicator & icon

Definitions (specific to queries)

<table>
<thead>
<tr>
<th>Word / Phrase</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Query</td>
<td>Individual data check on a field</td>
</tr>
<tr>
<td>Queried Form</td>
<td>A form that has at least one query within it. One form can have multiple queries within it.</td>
</tr>
<tr>
<td>Query Comment</td>
<td>Comment placed by CIBMTR that explains what should be reviewed or attached</td>
</tr>
<tr>
<td>Unresolved Query</td>
<td>Query that has not been approved.</td>
</tr>
<tr>
<td>Rejected Query</td>
<td>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.</td>
</tr>
<tr>
<td>Approved Query</td>
<td>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.</td>
</tr>
<tr>
<td>Query Status (QRY)</td>
<td>Form status that indicates the form has unresolved queries. <strong>Center action is required.</strong></td>
</tr>
<tr>
<td>Pending Status (PND)</td>
<td>Form status that indicates a center has responded to data check and that CIBMTR should review.</td>
</tr>
<tr>
<td>Complete Status (CMP)</td>
<td>Form status that indicates all queries and errors are resolved.</td>
</tr>
<tr>
<td>Error Status (ERR)</td>
<td>Form status that indicates unresolved potential corrections that need to be resolved by center so form can go to complete status.</td>
</tr>
</tbody>
</table>
Pre-requisite: How to resolve a query
FormsNet 3 Editable vs .pdf Forms
- It is important to know that the query process described in the How to resolve a query section is specific to FormsNet 3 editable forms.
  - FN3 editable forms are designated with red pen on a paper icon
  - “Not FormsNet 3” editable forms are designated with a .pdf icon
- In rare cases, a query may be placed on a not FN editable form. But more likely there are other forms that are not FormsNet editable for a related query placed on a FormsNet 3 editable form.
- These not FormsNet 3 editable forms will need to be updated with an error correction form (also known as an ECF). Once completed, you'll want to submit the error correction form via a CIBMTR Center Support ticket. Most ECFs can be found here: https://www.cibmtr.org/DataManagement/DataCollectionForms/Pages/Retired.aspx

**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.
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)

7. Exit pop-up and update answer/complete action
8. Interact with query icon
   a. Select option from dropdown

   ![Query Comments]

   b. Add a comment

   ![Query Comments]

   c. Click save now

   ![Save Now]

9. A successfully addressed query will now have a green check mark

   ![Sex]

10. Select the submit form icon

11. Before re-submitting the form, check for new potential correction errors

12. Submit form

13. Ensure form went to PND status

14. CIBMTR will then review the query and either:
   a. Approve the query => Form will go to 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.
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 easily and efficiently add a document 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.

There are several ways to attach an electronic document to a form in FormsNet3.

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, QRY. Simply click on the ‘Add Attachment’ icon to begin.
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. ‘Select File’ will allow you to browse your computer to locate the file that you would like to attach. 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.
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.

delete attachment icon:

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 FormsNet 3 system.
Ataching at the CRID level
Documents can also be attached at the ID level by selecting the “Upload ID Level Attachment” button located in the Attachments grid. The steps for attaching a document at the ID level are the same as attaching a document at the form level.

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

The Lost to Follow-up icon only displays for eligible forms and only if the form is in DUE status. Once the icon is clicked, the above dialog box displays. In order to proceed, you must select a reason code for Lost to Follow-up by clicking on the box in front of it.
- After a reason code is selected click on Submit Now, then the form status will change to LTF
- 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, please submit a ticket in CIBMTR center support to change the form back to the DUE status.
• If the form you wish to make LTF is in SVD status:
  o Click the EDIT form icon in the first row of the forms grid.
  o Then click the CLEAR FORM icon.
  o The window opens to verify that you want to clear data from the form, click Yes.
• If the form you wish to make LTF is not in SVD status, contact CIBMTR center support to reset the form. Once reset, you can proceed to make the form Lost to Follow-up electronically.

Survival
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. Select the survival button and then report the latest contact date applicable to the form you want to report the recipient’s survival.
Validation
Resolving Validation Errors

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.

- First, open the error override pop-up by clicking on the error icon.
- Next, 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.
- If confirmed that the data entered is correct based on your source documentation, then override the error using one of the override codes (NA-Not Answered, NT-Not Tested, UA-Unable to Answer, UK-Unknown, ND-Not Documented, or VC-Verified Correct), whatever makes sense for that particular error.
- 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.
- Once an override code is selected, click 'Save Now' and the error will be resolved and the error icon will clear.

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.

Correct 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

2. Specify other lymphoma histology:
   - <Select Override Code>

3. Assignment of DLBCL (germinal center)
   - Immunohistochemistry (e.g., Ki-1)
   - Gene expression profile
   - Unknown method

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

Error

"D1 - Specify the lymphoma histology" must be equal to "Form 2402 - Pre-TED - 2486 - Specify the original lymphoma histology (Particular, predominantly large cell (Grade III A follicle center lymphoma))"

Comment:
- 200 Character
Form Layout

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:

Form 2100 R5.0: Post-HCT Follow-Up Data
CRID: Visit: 4 year Event Date: 2008-10-05 Status: SVD

Form number 2100
Form Revision number R5.0
Form title Post-HCT Follow-up Data
CRID varies
Visit ID 4 year
Form Status SVD

Help
You must be in Edit Mode to enter or change data on the form. View Mode only allows you to view the form. Look on the Form Action Menu to see which mode you are in.

Form Action Menu

Under the form title bar is a row of icons as shown above. Each has a defined purpose:

Collapse all - Expand all Sections
• All sections (including multiple sections) of the form will either expand or collapse.

Submit
• 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.
Clear Form

- Clears all data entered on the form.
- The Clear Form icon only appears in the Form Action Menu for scheduled forms.
- Once the user clicks the Submit icon, the Clear Form icon will no longer be an option in the Form Action Menu.
- 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.
- The Cancel Form icon will only appear in the Form Action Menu for unscheduled forms.
- Once you click the Submit icon, the Cancel Form icon will no longer be an option in the Form Action Menu.

Print

- The system prints the form in its current state.

Jump to Question

- 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.

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.

Help

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 also on forms that were submitted prior to the edit.
### Answer Types

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

<table>
<thead>
<tr>
<th>Answer Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dropdown boxes</td>
<td><img src="image" alt="Dropdown boxes" /></td>
</tr>
<tr>
<td>Radio Buttons</td>
<td><img src="image" alt="Radio Buttons" /></td>
</tr>
<tr>
<td>Text Fields</td>
<td>Fill in the blank.</td>
</tr>
<tr>
<td>Check Boxes</td>
<td><img src="image" alt="Check Boxes" /></td>
</tr>
<tr>
<td>Check All that Apply</td>
<td><img src="image" alt="Check All that Apply" /></td>
</tr>
</tbody>
</table>

### 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.

### Question Enabling

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.
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:

<table>
<thead>
<tr>
<th>Expand a section</th>
<th>Collapse a section</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only that section will expand to expose the questions within that section.</td>
<td>Only that section will collapse to hide the questions within that section.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Book</th>
</tr>
</thead>
<tbody>
<tr>
<td>A slide box appears with instructional information specific for that section. The Book icon only appears if there is instructional text available for that section.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Form Section Status - Error</th>
</tr>
</thead>
<tbody>
<tr>
<td>At least one question within the section does not meet the validation rules or has been left blank. The form is incomplete, go back to make correction.</td>
</tr>
</tbody>
</table>

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 parentheses 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.

Help
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.
### Grid Functions

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export to Excel</td>
<td>Exports the grid that you currently have displayed. If you are in the Recipient Forms screen, the Recipient Information grid will also be exported.</td>
</tr>
<tr>
<td>Sort</td>
<td>Click to the right of the column header that you wish to sort and an arrow will be displayed. Click the arrow once to sort the column in ascending order. Click the arrow again to sort the column in descending order. Click a third time and the sort will disappear.</td>
</tr>
<tr>
<td>Filter</td>
<td>Click the filter icon to display a pop-up where you can enter criteria to filter the grid as you choose.</td>
</tr>
<tr>
<td>Clear all filters</td>
<td>Clears all sorts and filters that were applied.</td>
</tr>
<tr>
<td>Grid Pagination</td>
<td>Click on the page number or the arrows to navigate to the next page of the grid. Grid pagination is displayed at the bottom left of the grid.</td>
</tr>
<tr>
<td>Number of Records Returned</td>
<td>This is based on search criteria that you entered. The number of records returned displays at bottom right side of the grid.</td>
</tr>
</tbody>
</table>
**Form Action Icons**

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Create new form</strong></td>
<td>Opens a new form for data entry.</td>
</tr>
<tr>
<td><strong>Edit form</strong></td>
<td>Opens the form in edit mode allowing changes to be made.</td>
</tr>
<tr>
<td><strong>View Only Mode</strong></td>
<td>Opens the form, but no changes can be made.</td>
</tr>
<tr>
<td><strong>View Form in PDF</strong></td>
<td>Opens a Legacy form in a PDF format.</td>
</tr>
<tr>
<td><strong>View Error Report</strong></td>
<td>Opens the error report for any form that has been submitted with unresolved errors or had any overridden errors.</td>
</tr>
<tr>
<td><strong>View Form Change History</strong></td>
<td>Opens the form change history for that specific form. (Note: the Form change history was previously called the Audit Trail).</td>
</tr>
<tr>
<td><strong>Change form status to Lost to Follow-up</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Lock</strong></td>
<td>Indicates that the form is locked for audit, or CIBMTR has locked it for another reason. It can only be accessed in view only mode.</td>
</tr>
</tbody>
</table>
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.
Admin Tab

In the Admin tab:
- Access the security toolset
- Add/remove security roles
- View 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 of 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.
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.

Lost to Follow-up
When the Recipient 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.