

Acronym Expansions (Dotphrases) for Clinical Research

Acronym Expansions (or Dotphrases) are widely used in clinic notes for patients every day. These are an abbreviation used in electronic medical record systems as a shortcut. They can be utilized in clinical research documentation to save time and to have uniformity in source documents. See the step-by-step process to create, use, and share an Acronym Expansion. In addition, see the examples used for routine source documentation on informed consent and eligibility. Note, it can be used for other research study visits to capture the correct data points.

Acronym Expansion can assist with more than typical research documentation. For example, these phrases can remind study staff of pertinent information in the protocol (e.g. exclusion drugs), which can help avoid deviations and keep the participants safe during the research study.

How to Create an Acronym Expansion

Refer to [UHCare Acute Acronym Expansion](#) for detailed instructions.

Examples of names for acronym expansion:

- **[study short title]icf** – for informed consent process documentation
- **[study short title]eligibility** – for documenting subject eligibility

Use something easy to remember for these phrases

Templates for source documentation (edit the **bolded items** per participant and protocol):

- Informed consent:

Spoke with **XXX** regarding the clinical trial **XXX** in clinic today for **her/his/their** routine follow-up visit. Participant received a copy of the informed consent **in the mail/in clinic/email**. I spoke to the participant previously and believe **she/he/they** could be potentially eligible for the clinical trial. We reviewed the consent together, I assessed the participant's knowledge of the consent, and answered all questions. Participant understood the consent and would like to proceed. The participant signed and dated the consent **v(MM/DD/YY)** today with me in clinic. **Her/his spouse was present as well as a study coordinator [include if anyone was present during the informed consent process]**. The participant received a copy of the signed informed consent for **his/her/their** records.

- Eligibility:

I reviewed the participant's records and deemed **eligible/not eligible** based on the criteria below:

Inclusion Criteria:

[insert criteria from protocol]

Exclusion Criteria:

[insert criteria from protocol]

Utilizing Existing Acronym Expansions

“Import From Other User” allows you to import pre-existing Acronym Expansions from other people. Refer to the UHCare Acute Acronym Expansions for more details.

Creating Source Documentation with Acronym Expansions

After creating an acronym expansion, you can use it in a note within EMR. All you will need to do is type the acronym expansion in a free text area within EMR, then press **Enter** on your keyboard. Your acronym expansion will populate and you can edit any text within the acronym expansion. You can use several acronym expansions in one note.

Utilizing acronym expansions is a great way to ensure important data for a research project is captured. These records can be source documents for a research project. Refer to the following documents as templates for incorporating electronic source documentation:

- [Informed Consent Checklist](#)
- [Eligibility Checklist](#)
- [Off Treatment/Off Study Checklist](#)
- Study Visit Checklists

Acronym Expansions as Protocol Reminders

1. Follow instructions above to create an acronym expansion.
2. Share the acronym expansion with study team members.
3. The study reminders can be used while a physician is writing a clinic note for the patient during a study visit to ensure protocol compliance.
 - a. Some examples on how to utilize reminders:
 - i. Ibuprofen prohibited 24 hour prior to study drug injection.
 - ii. Fluids should be done 2 hours prior to administering study drug.
 - iii. GVHD grading should be completed on T+14, T+18, T+21, and T+35 per study protocol.
 - iv. Participant should see a study coordinator prior to leaving the clinic.
 - v. Only the following people are able to consent for this clinical trial: XX, YY, ZZ