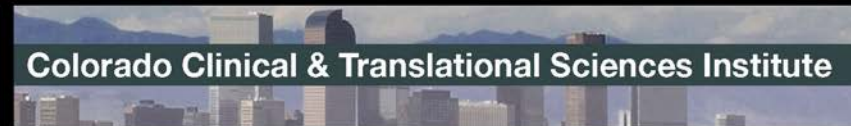


CTRC SCHEDULER

Cancer Center Hands-On Training

Presented by D'Andra Mixon and Jenni Cathcart



During Today's Session:

- What is the CTRC Scheduler?
- Practice scenarios
 - Adding a Participant
 - Scheduling Echo-only visits
 - Scheduling After-Hours visits
 - Patient status: checked-out/checked-in
 - Visit Cancellations
- Points to remember when using CTRC resources and the CTRC Schedule site

What is the CTRC Scheduler?

- HIPAA-compliant
- Secure
- Efficiently use the CTRC's space and resources
- Supports scheduling of visits in real-time
- Supports scheduling of inpatient and outpatient resources on a single platform

What is the Purpose of Hands-On Training?

- To become comfortable using the CTRC Scheduler site
- Practice different scenarios

WHY?

Beginning **May 7th**, You will use the CTRC Scheduler to schedule all CTRC resources including:

- Energy Balance Core Lab - DEXAs
- Cardiovascular Imaging (ECHO/ECGs)
- Rooms
- Nursing Services
- PA Services
- Nutrition Services
- After Hours Services

Accessing the CTRC Scheduler Site


- Link to the CTRC Scheduler Site: <https://scheduler.cctsi.ucdenver.edu/scheduler/>
- Pls must submit an Access form for each protocol:
<http://www.ucdenver.edu/research/CCTSI/programs-services/scheduler/Pages/default.aspx>



SCHEDULER

Username Password

[Register](#)
[Forgot My Password](#)

The Harvard Catalyst Scheduling System is a web-based application that provides clinical research center (CRC) and study staff a tool to manage resources, collect data, and schedule research subjects for study visits. The scheduling system reduces the amount of time CRC staff must spend scheduling resources and increases the ability of study teams to manage their own study visits. The scheduling system also captures meaningful data on resource usage and staff demand that can be used for both operating and reporting purposes.

 **HARVARD CATALYST** | THE HARVARD CLINICAL AND TRANSLATIONAL SCIENCE CENTER

To report issues, give comments, ask questions, please mail to: Thomas.Yaeger@ucdenver.edu Sending PHI through email is strictly prohibited.

The use of this application is for business purposes only. Your use of this application is monitored and a record of access may be reviewed by the institution and may be made available to authorized persons, including the subject, upon request. By using this application, you agree to keep any information found within private. Unauthorized use or disclosure of subject PHI (Protected Health Information) is strictly prohibited.

Practice: Confirming You are Added to a Study

- From the Homepage, click the **Studies** Tab
- All studies the coordinator works on will be visible

The screenshot shows the SCHEDULER web application interface. The navigation menu at the top includes HOME, RESOURCES, **STUDIES** (highlighted with a red arrow), SUBJECTS, MANAGEMENT, STANDARD REPORTS, and REPORT BUILD. Below the navigation, the breadcrumb path is 'Home > Studies List'. The main content area is titled 'Studies' and includes a pagination control showing 'Display Records: 50', 'Page 1 of 1', and a 'Go' button. A 'Create New Study' button is located in the top right corner. The main content is a table with the following columns: Name, PI Last Name, PI First Name, IRB Number, Local ID, Study Status, and a 'View Detail' link. The table contains 11 rows of study data.

Name	PI Last Name	PI First Name	IRB Number	Local ID	Study Status	View Detail
01-1234	Cathcart	Jennifer	01-1234	01-1234	OPEN	View Detail
13-0220: Study breakfast conditions' effects on blood levels of common lipid and glycemic biomarkers	Cathcart	Jennifer	13-0220	13-0220	OPEN	View Detail
13-2594: Effects of interrupting sedentary time on glycemic control in older overweight and obese adults	Cathcart	Jennifer	13-2594	13-2594	OPEN	View Detail
14-1297: Assessing tenofovir pharmacology in older HIV infected individuals receiving tenofovir-based antiretroviral therapy	Cathcart	Jennifer	14-1297	14-1297	OPEN	View Detail
14-2155: Is levothyroxine alone adequate thyroid hormone replacement for all patients?	Cathcart	Jennifer	14-2155	14-2155	OPEN	View Detail
15-0474: Dysregulation of FSH in Obesity: Functional Statistical Analysis	Cathcart	Jennifer	15-0474	15-0474	OPEN	View Detail
15-1412: Lipoprotein lipase enzyme activity assay validation and clinical assessment	Cathcart	Jennifer	15-1412	15-1412	OPEN	View Detail
16-1355: Evaluation of intravenous and intraperitoneal pharmacokinetics of dalbavancin in peritoneal dialysis patients	Cathcart	Jennifer	16-1355	16-1355	OPEN	View Detail
17-0356: Cardiovascular Mechanisms of Exercise Intolerance in Diabetes and the Role of Sex	Cathcart	Jennifer	17-0356	17-0356	OPEN	View Detail
19-0000 Clamp Test Templates	Cathcart	Jennifer		19-0000	OPEN	View Detail


Practice: Creating a New Study Subject

- Select the **Subjects** tab
- Click **Create New Subject** button

The screenshot displays the SCHEDULER web application interface. At the top, the navigation menu includes HOME, RESOURCES, STUDIES, **SUBJECTS** (circled in red), MANAGEMENT, STANDARD REPORTS, and REPORT BUILDER. Below the navigation, the breadcrumb trail shows Home > Subjects. The main content area is titled "Search Subject List" and features a search form with three input fields: "MRN", "Last name, First name", and "Birthdate MM/DD/YYYY" (with a calendar icon). A "Search" button is positioned to the right of these fields. On the far right of the search bar, the "Create New Subject" button is circled in red. Below the search bar, there are filter options for gender: "Filter by gender: Male Female Female to Male Male to Female Unreported Declined".

Create New Subject

* = Required

First Name *	<input type="text"/>	Street Address 1 *	<input type="text"/>	Add to Study	<input type="text" value="Choose or Type Ahead"/>
Middle Name/Initial	<input type="text"/>	Street Address 2	<input type="text"/>	Comment	<div style="border: 1px solid #ccc; height: 100px;"></div>
Last Name *	<input type="text"/>	City *	<input type="text"/>		
Gender *	<input type="text" value="Choose or Type Ahead"/>	State	<input type="text" value="Choose or Type Ahead"/>		
Race *	<input type="text" value="Choose or Type Ahead"/>	Zipcode *	<input type="text"/>		
Ethnicity *	<input type="text" value="Choose or Type Ahead"/>	Country *	<input type="text" value="Choose or Type Ahead"/>		
Birth Date *	<input type="text" value="MM/DD/YYYY"/> 	Primary Phone *	<input type="text"/>		
MRN *	<input type="text"/>	Secondary Phone	<input type="text"/>		



- Complete all demographic information
- Enter MRN
- Select the study from the dropdown menu
- Click **Save**

Practice: Scheduling a New Visit

- Return to the homepage
- Click the (+) sign to open the Schedule New Appointment Dropdown

The screenshot displays the SCHEDULER interface. At the top left is the SCHEDULER logo. At the top right, the 'HOME' link is circled in red. Below the logo are three tabs: 'Appointments', 'Visit Templates Needing Approval', and 'Resource Timeline'. Under 'Appointments', there are radio buttons for 'View by: Calendar' (selected) and 'List'. Below this is a 'Select Date: 03/18/2019' field with a calendar icon, a 'Filter By: choose' dropdown menu, and a 'Reset' button. A large red arrow points to a button labeled '+ Schedule New Appointment'. At the bottom, there is a legend for appointment statuses: Available (blue checkmark), Scheduled (green checkmark), Hold (yellow pushpin), Checked In (purple download), Checked Out (grey upload), Canceled (red X), and Unavailable (orange slash).

- Select COMIRB# 13-0220
- Patient is coming in for Visit 1
- Select newly added patient
- Search a single day or a an entire visit window
- Use military time when selecting the start time and end time range
- Click **Search**

Schedule New Appointment

Study 13-0220: Study breakfast conditions' effects on bl... ⓘ Investigator: Jennifer Cathcart

Visit ⓘ Visit Duration: 180 minutes (3 hr, 0 min)

Subject ⓘ Hold the appointment without a subject

Select Search Range Schedule Overbook

Start Date Start Time

End Date End Time

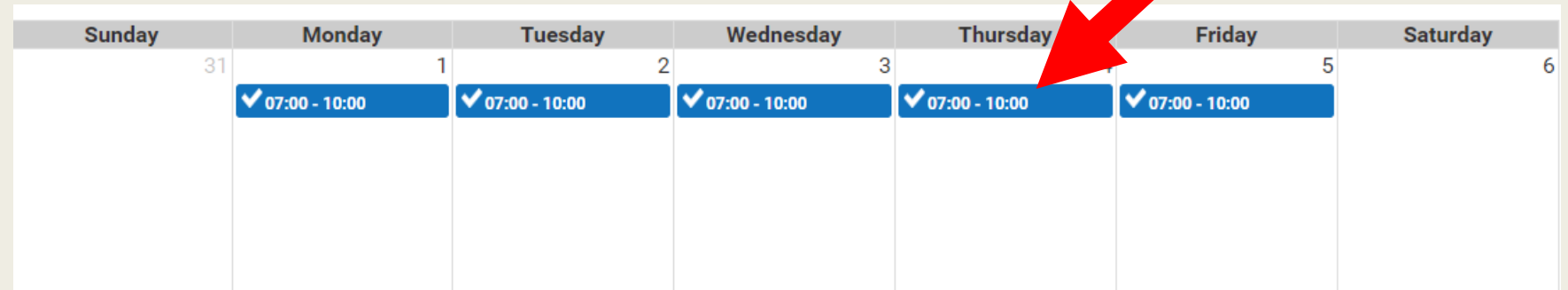
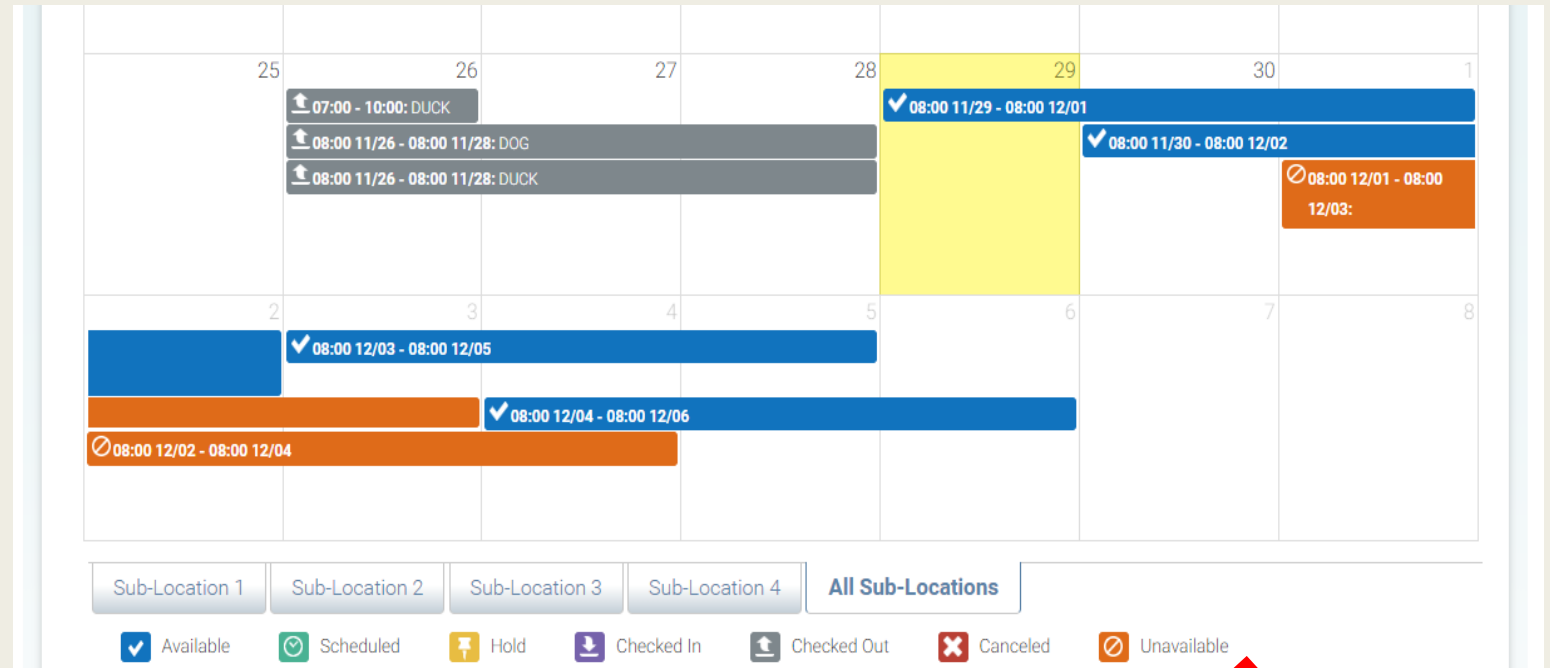
Specific days All Weekdays Monday Tuesday Wednesday Thursday Friday
 Saturday Sunday

+ Resources

- Review the calendar to identify **available appointments**

- Visits are color-coded:

- **Green:** scheduled
- **Orange:** Unavailable resources
- **Blue:** Available to schedule
- **Gray:** Completed Visits
- **Purple:** Patient has Checked-In
- **Red:** Cancelled



- Select the visit that works best with your patient's availability
- The "comment" box can be used to enter:
 - Patient ID
- Click **Schedule** button

Appointment Details

Local ID: 13-0220
Investigator: Jennifer Cathcart
Visit: Visit 1
Subject: No Subject Assigned
MRN: N/A
Gender: N/A
Visit Start Time: 04/04/2019 07:00
Visit End Time: 04/04/2019 10:00

Fixed Float Float Group Flex

Resource Name	Start Time	End Time
<input type="checkbox"/> Infusion Chair 1 - Sub-Location 1	04/04/2019 07:00	04/04/2019 10:00
<input type="checkbox"/> Nurse 1 - Sub-Location 1	04/04/2019 07:15	04/04/2019 07:45
<input type="checkbox"/> Meal, Weighed-Controlled - Sub-Location 1	04/04/2019 07:30	04/04/2019 07:45
<input type="checkbox"/> Nurse 1 - Sub-Location 1	04/04/2019 08:00	04/04/2019 08:15
<input type="checkbox"/> Nurse 1 - Sub-Location 1	04/04/2019 08:30	04/04/2019 08:45
<input type="checkbox"/> Nurse 1 - Sub-Location 1	04/04/2019 09:00	04/04/2019 09:15

Comment:

255 characters remaining

Cancer Center Inpatient + Outpatient Visits:

Cancer Center protocols will have access to:

1. Outpatient: ECHO-only visit
2. Inpatient: Cancer Center Visit

Schedule New Appointment

Study: 17-0132 - 17-0132: A phase 1b study evaluating atezolizumab ... ⓘ Investigator: Theresa Medina

Visit: Choose or Type Ahead ⓘ

Subject: **Cancer Center Visit** ⓘ Hold the appointment without a subject
Echo Only Visit

Select Search Range Schedule Overbook

Earliest Start Date: Earliest Start Time:

Latest End Date: Latest End Time:

+ Resources

[Restart](#)

Scheduling After Hours Services Using the Cancer Center Visit

Prior to the Inpatient Visit:

- Search for an available timeslot using the Scheduler
- Select the appointment and click the Schedule button
- Add the visit-specific resources you will need to the comments section:
 - *Examples: Observation for 4 hours, vitals Q30mins, ECG Q1hour*

Day of the Inpatient Visit:

- Pend the after-hours orders
- Call the CTRC to confirm resources and transition the patient
- The nurse/tech will update the visit:
 - Length of time the resources were used
 - Remove any unused resources

Scheduling Late-Adds:

- All services must be scheduled at least 7 business days in advance
- To schedule late- add appointments:
 1. Search the calendar to identify an available timeslot
 2. Contact the core directly (inpatient CTSC or cardiovascular imaging)
 3. The core will approve or decline the visit
 4. The core will enter the approved visit on the Scheduler calendar
 5. You will be able to see the approved visit on the calendar

Practice: Confirming the Visit is Scheduled



- Click the Home tab
- To find the scheduled visit, filter based on study or patient last name
- The scheduled visit will appear on the calendar in **green**

3	4	5	6
10	11	12	13

- **Green:** scheduled
- **Orange:** Unavailable resources
- **Blue:** Available to schedule
- **Gray:** Completed Visits
- **Purple:** Patient has Checked-In
- **Red:** Cancelled

Practice: Confirming Check-In and Check-Out

- Open the homepage calendar and filter to search for the visit
- Appointments where the patient has **checked-in** will appear in purple
- **Checked-Out** visits will appear in gray
 - If your patient has forgotten to check out, notify the front desk

17	18	19	20
		 07:00 - 09:30: DOG	 07:00 - 08:00: GLENWOOD

Practice: Visit Cancellations

- Patient not available
- Select the visit from the homepage calendar
- Select the cancellation reason from dropdown menu
- Select the **Cancel Appointment** button

Nurse 1 - Sub-Location 1		03/05/2019 08:30	03/05/2019 08:45	Edit Delete
Nurse 1 - Sub-Location 1		03/05/2019 09:00	03/05/2019 09:15	Edit Delete

Cancellation Reason: choose ▾

Comment:

255 characters remaining

[Save Comment](#) [View Comments](#) ⁰ [Check-In Appointment](#) **[Cancel Appointment](#)** [Close](#)

What to Remember when Using the Scheduler:

- If your protocol uses additional resources, please contact us during study start-up to ensure your visits are built
- All participants must check out after their appointment
 - Call or email immediately to report check-out time if patient did not check-out
- No confirmation email once an appointment is scheduled
 - Appointment will show up in **GREEN** on the calendar
- The EBL team and the inpatient team will need to be contacted for all visits scheduled AND cancelled less than seven days prior to the visit

Questions?

Contact us with any questions/feedback!

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