# CLINICAL AND TRANSLATIONAL RESEARCH CENTER (CTRC) SCHEDULER INSTRUCTIONS: UNIVERSITY OF COLORADO HOSPITAL (UCH) LOCATION

## CONTENTS (all sections are tagged: hit Ctrl+click to go to section of interest)

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Tips To Keep in Mind</td>
<td>2</td>
</tr>
<tr>
<td>Section 1. Adding Participants To The Scheduler System.</td>
<td>3</td>
</tr>
<tr>
<td>1.4. How to get an appointment without an MRN</td>
<td></td>
</tr>
<tr>
<td>1.5 Appointment hold without an MRN</td>
<td></td>
</tr>
<tr>
<td>Section 2. Schedule A New Appointment.</td>
<td>5</td>
</tr>
<tr>
<td>2.1. Regular appointments</td>
<td></td>
</tr>
<tr>
<td>2.2. Add-on appointments, less than 7 business days in advance</td>
<td></td>
</tr>
<tr>
<td>Section 3. Cancel An Appointment.</td>
<td>9</td>
</tr>
</tbody>
</table>
QUICK TIPS TO KEEP IN MIND WHEN SCHEDULING AN APPOINTMENT

A. All appointments must be made **7 DAYS IN ADVANCE**. Please email ctrcscheduler@ucdenver.edu if you need to schedule within 7 days.

B. Participants must be added to Scheduler using their UCH MRN and associated with your specific study before you can schedule an appointment. See instructions if your patient does not have a UCH MRN.

C. Remember that participants must check in AND check out with CTRC staff for all appointments.

D. You cannot change an appointment. If you need to reschedule an appointment, you will need to cancel the existing appointment and create a new one.

E. If your appointment requires Nutrition meals, we require templated dietary details in the comments box that **must be followed exactly**. This can be the ONLY comment for your appointment:
   a. First diet date; Last diet date (for one day diets this will be the same as the first diet date); Pick-up date; Pick-up time (military time); Pick-up location; OP kcals; IP kcals (if there is an IP stay, please enter even if the same as IP kcals); meal selection (if not a personalized diet)
   b. Separate each category with a semicolon.

   **Example:**
   6/10/19; 6/13/19; 6/9/19; 1400; LOB; 2015kcal; 1852kcal
SECTION 1. ADDING PARTICIPANTS TO THE SCHEDULER SYSTEM.

1.1 Check if the person you want to schedule is in Scheduler by going to the Subjects header.

1.2 Enter the MRN or Last Name AND Date of Birth and click “Search”.
If the participant already exists in the system, jump to Section 2. If not, click “Create New Subject” complete the remaining step in this section.

1.3 Complete all required fields using UCH MRN
Add the participant to the appropriate study using the dropdown. Click “Save” when finished.
1.4. How to get an appointment without an MRN

If you do not have a UCH MRN, complete the Request MRN form on the Scheduler website. You will need to provide:

- Participant’s legal name. No nicknames or abbreviations, eg. do not use Andy or Drew instead of Andrew
- Date of birth
- Address
- Phone number
- Protocol number
- CTRC Scheduler study visit name
- Requested appointment time/s

If all information is provided, Scheduler staff will obtain the MRN and make the Scheduler appointment for you. This is generally only necessary for the participant’s first visit.

1.5 Appointment hold without an MRN

For studies with participant populations that cannot be identified prior to consent, use the MRN request form on the Scheduler website to request an appointment hold without MRN. Only Scheduler staff can hold an appointment without an MRN. Appointment holds will be scheduled for consent visits ONLY without prior authorization. If you believe that you will need to request any non-consent visits without an MRN, please contact Janine Higgins, CCTSI Director of Operations directly (Janine.higgins@childrenscolorado.org).
SECTION 2. SCHEDULE A NEW APPOINTMENT.

There are several steps to scheduling a new appointment in CTRC Scheduler:

1. Check that the participant you will schedule is in Scheduler. If they are not in the system, add them.
2. Associate the participant with your study.
3. Make the appointment, see below. If you need an appointment within 7 business days, please go to Section 2.2. Add-on appointments.

2.1. Regular appointments

2.1.1 Navigate to the “Home” header at the top of the screen.

2.1.2 Expand the information for “Schedule New Appointment“:

a) Select the correct study from the dropdown menu.

b) Select the study visit you want to schedule

c) Select the correct participant. The participant must already be added to the study in order to find their name. If you can’t find their name, go to Section 1. Adding participants to the scheduler system.

d) Choose the desired date range for the visit. For inpatient studies, the dates range must encompass all of the days of your visit to show availability. For example, if you have a 5 day inpatient visit, your search window must be AT LEAST 5 days.
2.1.3 All available appointments will be displayed in blue. Click the desired appointment.

Unavailable times are displayed in orange. Clicking an orange appointment will show the resources that are unavailable. In some cases, you may be able to contact the department head to arrange an overbook.

a) Clicking on a blue appointment will show a pop up of your appointment detail:

b) If any Nutrition Core meal/s are required for the visit, add dietary information to the comments box in this exact format: First diet date; Last diet date (for one day diets this will be the same as the first diet date); Pick-up date; Pick-up time (military time); Pick-up location; OP kcals; IP kcals (if there is an IP stay, please enter even if the same as OP kcals); meal selection (only if not a personalized diet)

i. Separate each category with a semicolon, eg 6/10/19; 6/13/19; 6/9/19; 1400; LOB; 2015kcal; 1852kcal
c) Select Schedule.

2.1.4 The scheduled appointment will appear on the calendar in green.
2.2. Add-on appointments within 7 days.

**CTRC workflows require 7 days’ notice for any new appointment.**

a) In order to schedule an appointment within 7 days, please email ctrcscheduler@ucdenver.edu to confirm availability. Remember not to send PHI via email.

b) Scheduler staff will make the appointment if we have availability. The appointment will show in green on your study calendar. You will not receive other notification of your visit so always confirm in your study calendar.
SECTION 3. CANCEL AN APPOINTMENT.

CTRC Scheduler appointments cannot be rescheduled. To reschedule an appointment, you will need to cancel and then create a new appointment.

3.1 Navigate to the “Home” header at the top of the screen.

3.2 Choose the date of the visit. Select Filter By: “Subject Last Name”, type in the last name, and click Filter.
3.3 *Locate the appointment you want to cancel and click on it.*
In the drop down, select the cancellation reason. Be as specific as possible. For example, if the patient did not fast for the appointment, select “Ineligible for this visit: Non Adherent.” The appointment cannot be rescheduled, it must be canceled and a new one created. After you have selected the reason, click “Cancel Appointment,” then click “Yes.”

3.4 *Once the appointment has been successfully canceled or marked as a No Show, it will turn red.*