



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

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## QUICK TIPS TO KEEP IN MIND WHEN SCHEDULING AN APPOINTMENT

- A. All appointments must be made **7 CALENDAR DAYS IN ADVANCE**, with the exception of Energy Balance Lab only appointments (DXAs, GXTs) which can be made 48 hours in advance and Nutrition, which must be made 7 business days in advance. **Anything scheduled outside of this window will not be seen by CTRC staff** and we will not be prepared for your appointment. Contact the Scheduler staff if you need to schedule within 7 calendar 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 (Section 1.4) 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 reschedule an appointment. If you need to change an appointment, cancel the existing appointment and create a new one.
- E. Nutrition appointments must be made **7 BUSINESS DAYS IN ADVANCE**. 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:**

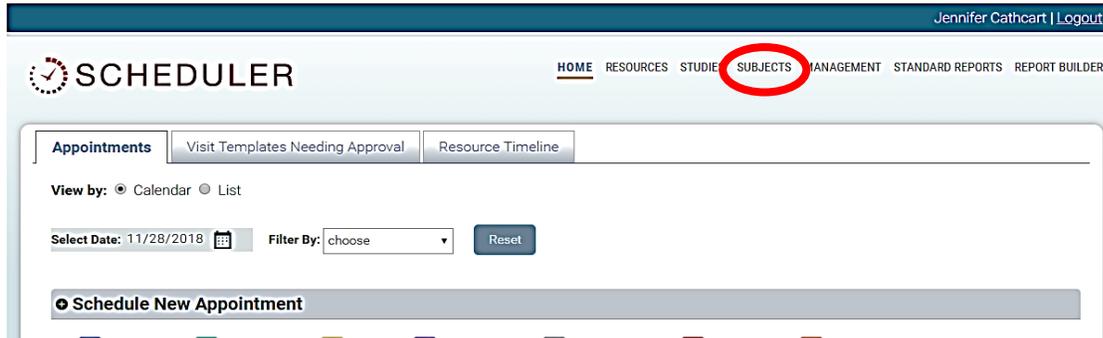
6/10/19; 6/13/19; 6/9/19; 1400; LOB; 2015kcal; 1852kcal



# SECTION 1: ADDING A PARTICIPANT TO THE SCHEDULER SYSTEM

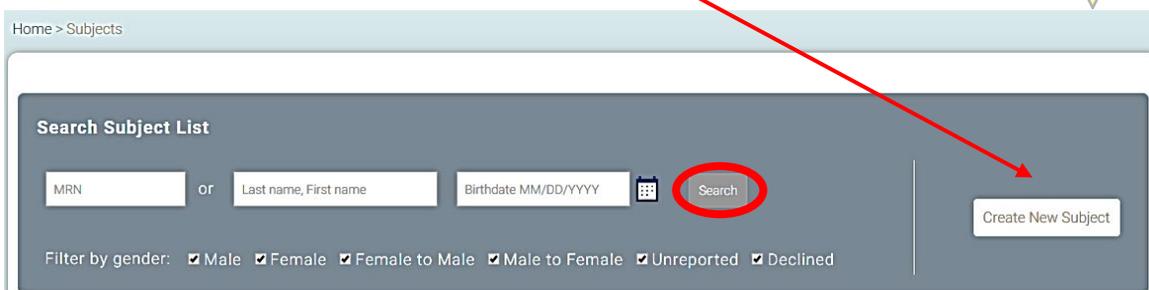
## 1.1: Search for existing participants or add a participant to the system

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



1.1.2 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" and complete the remaining step in this section. If you do not have a UCH MRN for this participant, skip to 1.2.



1.1.3 Complete all required fields using UCH MRN

Add the participant to the appropriate study using the dropdown. Click "Save" when finished.

**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: 80px;"></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"/>		



**1.2: 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 generate the MRN and make the Scheduler appointment for you. This is generally only necessary for the for the participant's first visit. You will receive email confirmation once this is complete.

**1.3: 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](mailto:Janine.higgins@childrenscolorado.org)).



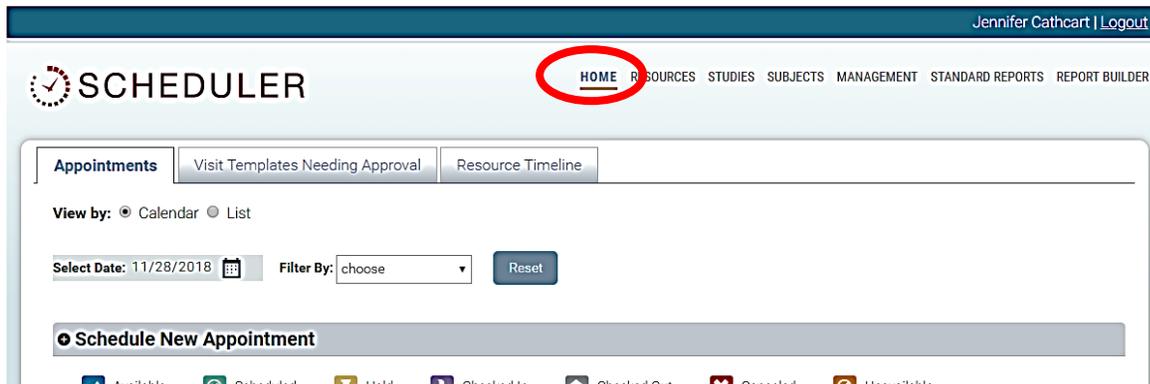
## SECTION 2: SCHEDULING A NEW APPOINTMENT

There are several steps to scheduling a new appointment in CTSC 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 calendar days, please go to Section 2.2: Add-on appointments.

### 2.1: Regular appointments (outside 7 calendar days)

#### 2.1.1 Navigate to the "Home" header at the top of the screen.



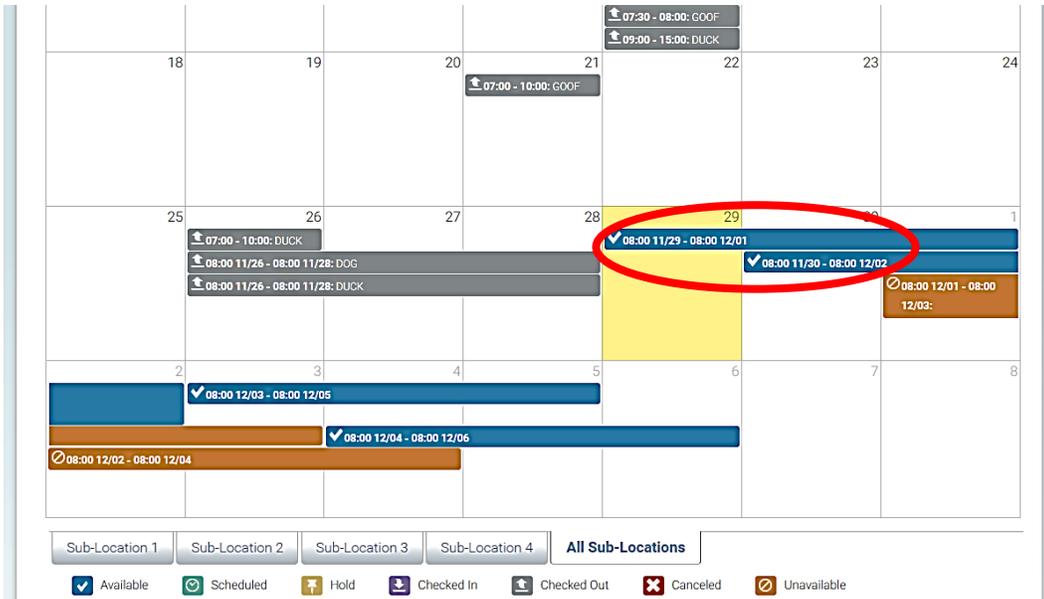
#### 2.1.2 Expand the information for "Schedule New Appointment":

- 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:

**Appointment Details**

**visit Summary**

**Study:** Meal Test  
**Local ID:** 333333  
**Investigator:** Jennifer Cathcart  
**Visit:** Visit 3 (Inpatient)  
**Subject:** DONALD DUCK  
**MRN:** 987654  
**Gender:** Male  
**Visit Start Time:** 11/29/2018 08:00  
**Visit End Time:** 12/01/2018 08:00

Fixed
  Float
  Float Group
  Flex

Resource Name	Start Time	End Time
1 Day Diet - Sub-Location 1	11/29/2018 08:00	11/29/2018 09:00
Nurse 1 - Sub-Location 2	11/30/2018 08:00	11/30/2018 20:00
Room 4 Bed A (1223) - Sub-Location 2	11/30/2018 08:00	12/01/2018 08:00
Nurse 1 - Sub-Location 2	12/01/2018 04:00	12/01/2018 08:00

**Comment:**   
255 characters remaining

Schedule Close

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.

**Appointment Details**  
visit Summary

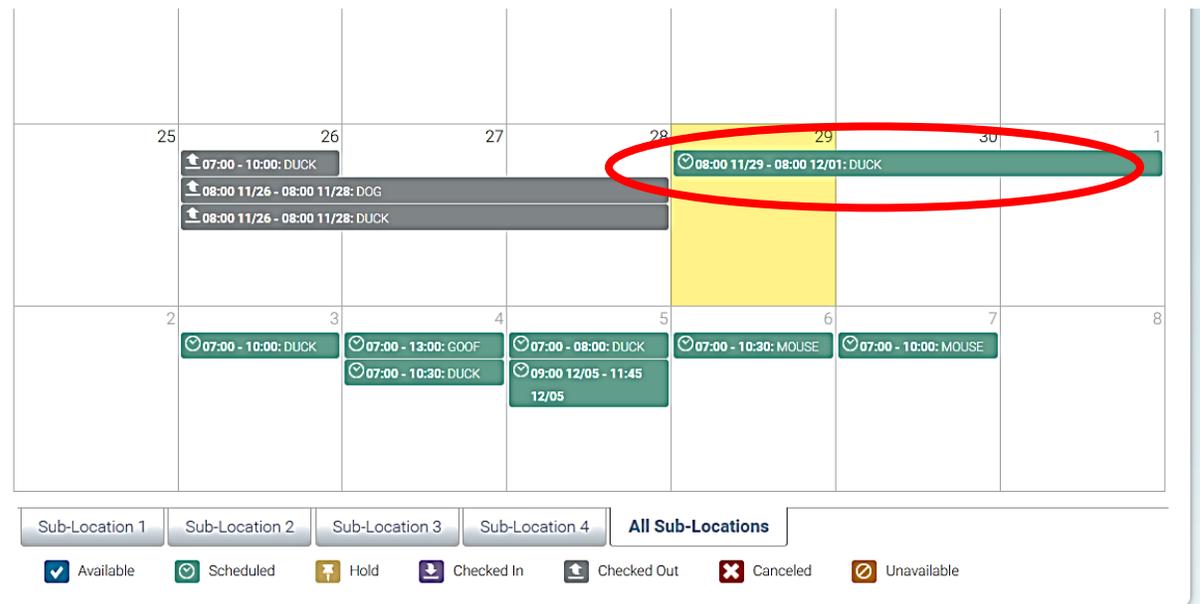
**Study:** Meal Test  
**Local ID:** 333333  
**Investigator:** Jennifer Cathcart  
**Visit:** Visit 3 (Inpatient)  
**Subject:** DONALD DUCK  
**MRN:** 987654  
**Gender:** Male  
**Visit Start Time:** 11/29/2018 08:00  
**Visit End Time:** 12/01/2018 08:00

Fixed  Float  Float Group  Flex

Resource Name	Start Time	End Time
1 Day Diet - Sub-Location 1	11/29/2018 08:00	11/29/2018 09:00
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Room 4 Bed A (1223) - Sub-Location 2	11/30/2018 08:00	12/01/2018 08:00
Nurse 1 - Sub-Location 2	12/01/2018 04:00	12/01/2018 08:00

**Comment:** Diet: 1 day or 3 day lead-in (select one)  
Dates needed: 10/24/2018-10/26/2018  
Pick-up date and time: 10/23/2018 @ 10:00 AM  
96 characters remaining.

2.1.4 The scheduled appointment will appear on the calendar in green.





**2.2. Add-on appointments, within 7 business days.**

**CTRC workflows require 7 calendar days' notice for any new appointment.** The exception is the Energy Balance Lab (DXA and exercise tests), which only requires 2 days' notice for new appointments. CTRC staff prepare and transfer all Scheduler appointments to Epic in a rostered sequence so we will NOT see any appointments scheduled within 7 business days. For these "add-on" appointments:

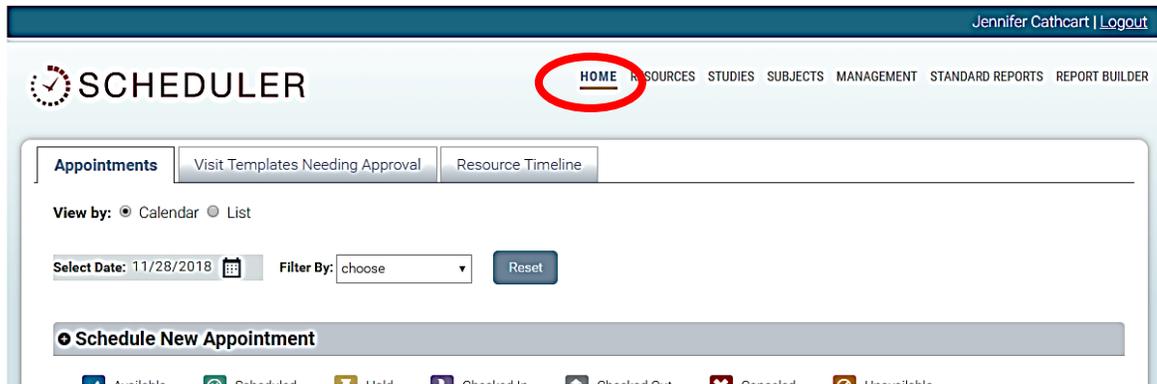
- a) Use Scheduler to check for possible CTRC availability - with the caveat that we may not be able to accept every appointment showing as available within the 7 calendar day window. DO NOT MAKE THE APPOINTMENT.
- b) Contact the CTRC Core directly to confirm availability. Remember not to send PHI via email.
- c) CTRC 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.



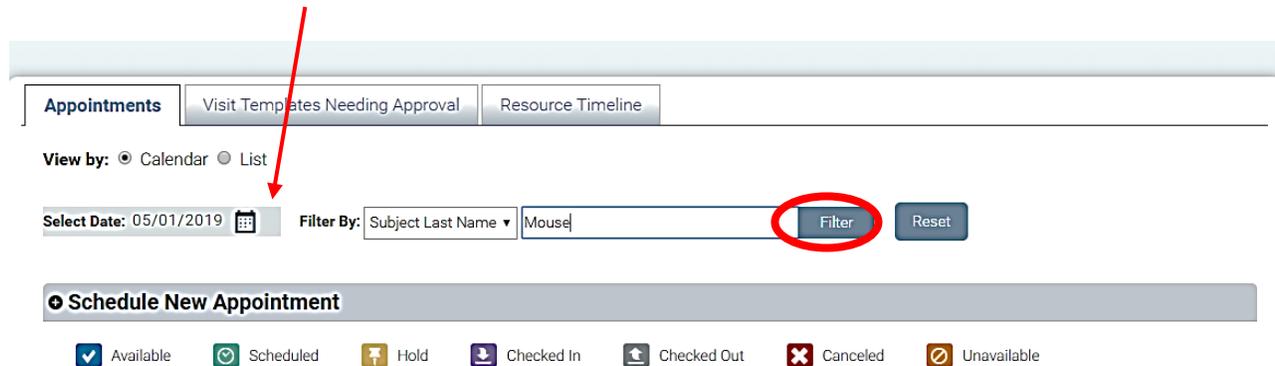
## SECTION 3: CANCELING AN APPOINTMENT

CTSC Scheduler appointments cannot be rescheduled. To reschedule an appointment, you will need to cancel and then create a new appointment. **If you cancel an appointment within 7 CALENDAR days, please notify CTSC staff.**

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."

**Check-In/Cancel Appointment**

**Scheduled Visit Summary**

**Study:** 17-0356: Cardiovascular Mechanisms of Exercise Intolerance in Diabetes and the Role of Sex  
**Local ID:** 17-0356  
**PI Last Name:** Cathcart  
**Visit Name:** Visit 6  
**Subject Name:** MICKEY MOUSE [Remove or Switch Subject](#)  
**MRN:** 1234567  
**Scheduled on:** 2018-11-13 15:10 by user: cathcarj

**Scheduled Resources**

Display Records: 50 Page 1 of 1 [Go](#) [Overbook Check](#) [Add New Resource](#)

Resource Name	Resource Activities	Start Time	End Time	
Phlebotomy Chair 1 - Sub-Location 1	Blood Collection Simple	12/07/2018 07:00	12/07/2018 07:30	<a href="#">Edit</a>   <a href="#">Delete</a>
Tech 1 - Sub-Location 1	Blood Collection Simple - Adult	12/07/2018 07:00	12/07/2018 07:30	<a href="#">Edit</a>   <a href="#">Delete</a>
Echo Room 1 (388) - Sub-Location 1	Service (includes Technician)	12/07/2018 07:30	12/07/2018 08:30	<a href="#">Edit</a>   <a href="#">Delete</a>
Sonographer 1 - Sub-Location 1		12/07/2018 07:30	12/07/2018 08:30	<a href="#">Edit</a>   <a href="#">Delete</a>
Exam Room 12 (377) - Sub-Location 1		12/07/2018 08:30	12/07/2018 10:00	<a href="#">Edit</a>   <a href="#">Delete</a>

**Cancellation Reason:** choose →

**Comment:**   
255 characters remaining

[Save Comment](#)
[View Comments <sup>0</sup>](#)
[Check-In Appointment](#)
[Cancel Appointment](#)
[Close](#)

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





## SECTION 4: REMOVING A PARTICIPANT FROM A STUDY

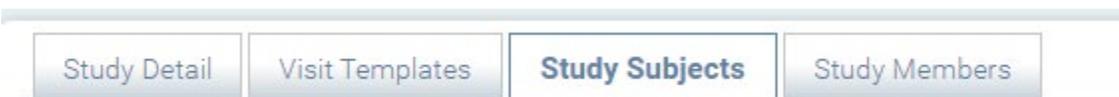
4.1 Click the “Studies” tab at the top of the screen



4.2 Select “View Detail” of the study associated to the participant who needs to be removed

06-1231: Surveillance Monitoring for ART Toxicities Study in HIV-uninfected Children Born to HIV-infected Women (SMARTT Study)	McFarland	Elizabeth	06-1231	06-1231	OPEN	<a href="#">View Detail</a>
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4.3 Select the “Study Subjects” tab to view all subjects associated to the study



4.4 Locate the subject and click the “Active” hyperlink which will ask you to confirm that you want to change the status of the subject. Click “Yes.” The status will now read, “Not Active.”

08/02/1962	AURORA	Colorado	(720) 848-0000	<a href="#">Active</a>	<a href="#">View Details</a>
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