



Colorado Clinical & Translational Sciences Institute

INTRODUCTION TO CTRC SCHEDULER



SCHEDULER TEAM

- *Janine Higgins: Director of Operations*
- *Jenni Cathcart: Scheduling Manager*
- *Colin Shira: Scheduler*
- *Michelle Kim: OP Clinic Front Desk*



WHAT IS SCHEDULER?

- *Scheduler is a secure, HIPAA-compliant, web-based application*
- *The goals of Scheduler are to:*
 1. *Consolidate scheduling for all CTSC cores*
 2. *Increase efficiency and ease of scheduling*
 3. *Allow for scheduling in real time*



WHAT IS SCHEDULER USED FOR?

- *ALL inpatient and outpatient CTSC study visits are set up through Scheduler*
- *This includes :*
 - *Rooms*
 - *Nursing services*
 - *APP services*
 - *Nutrition services*
 - *EBL: Exercise, DEXAs*
 - *Cardiovascular imaging*



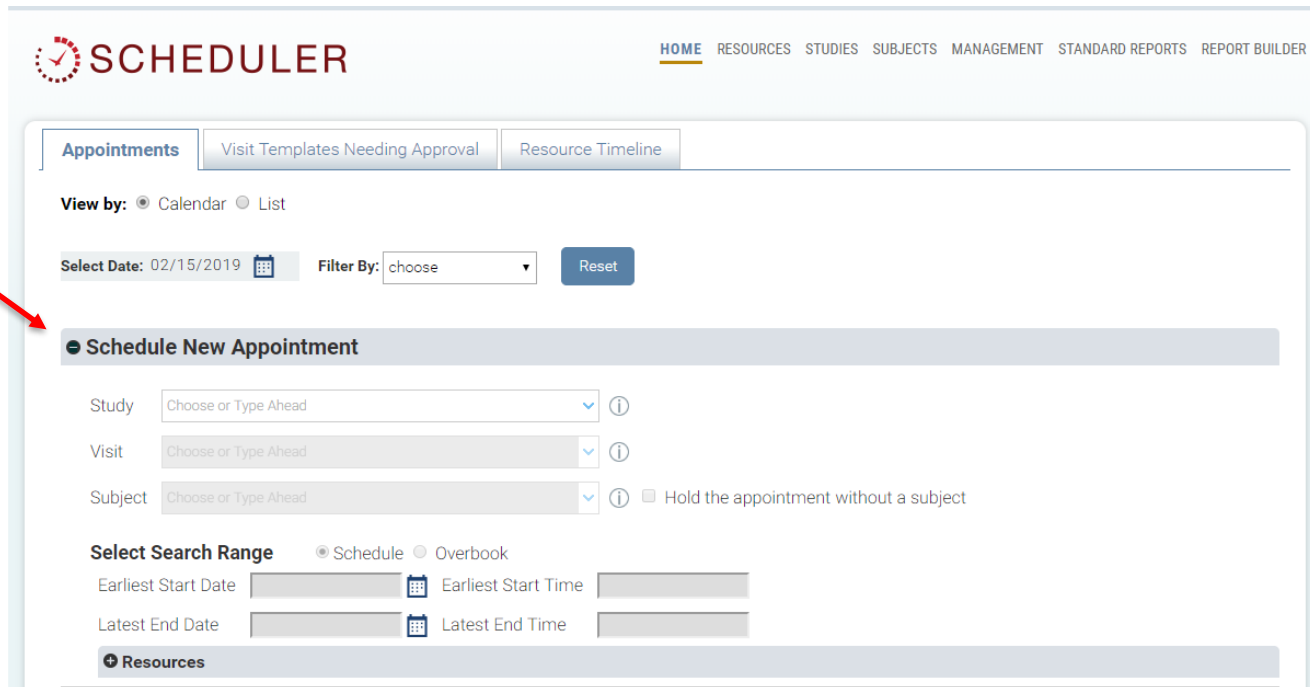
HOW DOES SCHEDULER WORK?

- *All studies have visit templates prepared by the Scheduler staff and entered into the system*
- *Study staff will have access to the studies they work on once the PI signs off on the personnel*
- *Study staff will add participants to their studies in Scheduler using their UCH MRN so they can be scheduled in real time*



HOW DO I SCHEDULE AN APPOINTMENT?

1. From the home screen, click ***Schedule New Appointment***



The screenshot shows the SCHEDULER interface. At the top, there is a navigation bar with links: HOME, RESOURCES, STUDIES, SUBJECTS, MANAGEMENT, STANDARD REPORTS, and REPORT BUILDER. Below this is a tabbed interface with three tabs: Appointments (selected), Visit Templates Needing Approval, and Resource Timeline. Under the Appointments tab, there is a 'View by:' section with radio buttons for 'Calendar' (selected) and 'List'. Below that is a 'Select Date:' field with a calendar icon and a date of 02/15/2019, a 'Filter By:' dropdown menu with 'choose' selected, and a 'Reset' button. A red arrow points to the 'Schedule New Appointment' button, which is highlighted in a light blue bar. Below this bar are three dropdown menus for 'Study', 'Visit', and 'Subject', each with a placeholder 'Choose or Type Ahead' and an information icon. To the right of these dropdowns is a checkbox labeled 'Hold the appointment without a subject'. Below these fields is a 'Select Search Range' section with radio buttons for 'Schedule' (selected) and 'Overbook'. This section contains four date and time input fields: 'Earliest Start Date', 'Earliest Start Time', 'Latest End Date', and 'Latest End Time'. At the bottom of the form is a 'Resources' section with a plus icon and the word 'Resources'.



HOW DO I SCHEDULE AN APPOINTMENT?

2. Select the appropriate study, visit, and subject
3. Enter the visit window and any other timing parameters
4. Click ***Search***

➡ Schedule New Appointment

Study ⓘ Investigator: Jennifer Cathcart
Visit ⓘ Visit Duration: 150 minutes (2 hr, 30 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

Restart

Search



HOW DO I SCHEDULE AN APPOINTMENT?

5. Click on the appointment time you would like to schedule

- **BLUE** appointments are available
- **ORANGE** appointments are unavailable
- **GREEN** appointments are already scheduled
- **GRAY** appointments have been checked out

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

☒ Available ☒ Scheduled ☐ Hold ☐ Checked In ☐ Checked Out ☒ Canceled ☒ Unavailable

Sub-Location 1 Sub-Location 2 Sub-Location 3 Sub-Location 4 **All Sub-Locations**

November 2018

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	1	2	3
	<div>07:00 - 09:30: DUCK</div> <div>08:30 - 11:00: DUCK</div> <div>09:00 - 13:00: DOG</div>	<div>07:00 - 10:00: DUCK</div> <div>14:00 10/30 - 06:00 11/01: MOUSE</div>	<div>07:00 - 15:00: DUCK</div> <div>07:30 - 10:30: DOG</div> <div>09:00 - 15:00: MOUSE</div>	<div>07:00 - 08:30: GOOF</div> <div>08:30 - 11:30: DUCK</div>	<div>07:00 - 10:00</div> <div>07:30 - 10:30</div> <div>07:30 - 10:30: MOUSE</div> <div>08:00 - 11:00</div> <div>08:30 - 11:30</div> <div>09:00 - 12:00</div>	
4	5	6	7	8	9	10
	<div>07:00 - 10:00</div> <div>07:30 - 13:30: GOOF</div> <div>07:30 - 10:30</div> <div>08:00 - 11:00</div> <div>08:30 - 11:30</div> <div>09:00 - 12:00</div>	<div>07:00 - 13:00: DUCK</div> <div>07:00 - 10:00</div> <div>07:30 - 10:30</div> <div>08:00 - 11:00</div> <div>08:30 - 11:30</div> <div>09:00 - 12:00</div>	<div>07:00 - 11:00: DOG</div> <div>07:00 - 11:00: DUCK</div> <div>07:00 - 11:00: MOUSE</div> <div>07:00 - 10:00</div> <div>07:30 - 10:30</div> <div>08:00 - 11:00</div> <div>08:30 - 11:30</div> <div>09:00 - 12:00</div>	<div>07:00 - 10:00</div> <div>07:30 - 10:30</div> <div>08:00 - 11:00</div> <div>08:30 - 11:30</div> <div>09:00 - 12:00</div>	<div>07:00 - 10:00</div> <div>07:30 - 12:30: DUCK</div> <div>07:30 - 12:30: DUCK</div> <div>07:30 - 12:30: GOOF</div> <div>08:00 - 11:00</div> <div>08:30 - 11:30</div> <div>09:00 - 12:00</div>	



HOW DO I SCHEDULE AN APPOINTMENT?

6. Review the appointment details and click ***Schedule***

Appointment Details

Visit Summary

Study:

Sub3 Study 1

Local ID:

11111

Investigator:

Jennifer Cathcart

Visit:

Visit 2

Subject:

DAISY DUCK

MRN:

765432

Gender:

Female

Visit Start Time:

03/07/2019 07:00

Visit End Time:

03/07/2019 11:00

Fixed

Float

Float Group

Flex

Resource Name	Start Time	End Time
Infusion Chair 1 - Sub-Location 3	03/07/2019 07:00	03/07/2019 11:00
Nurse - Sub-Location 3	03/07/2019 07:00	03/07/2019 11:00

Comment:

255 characters remaining

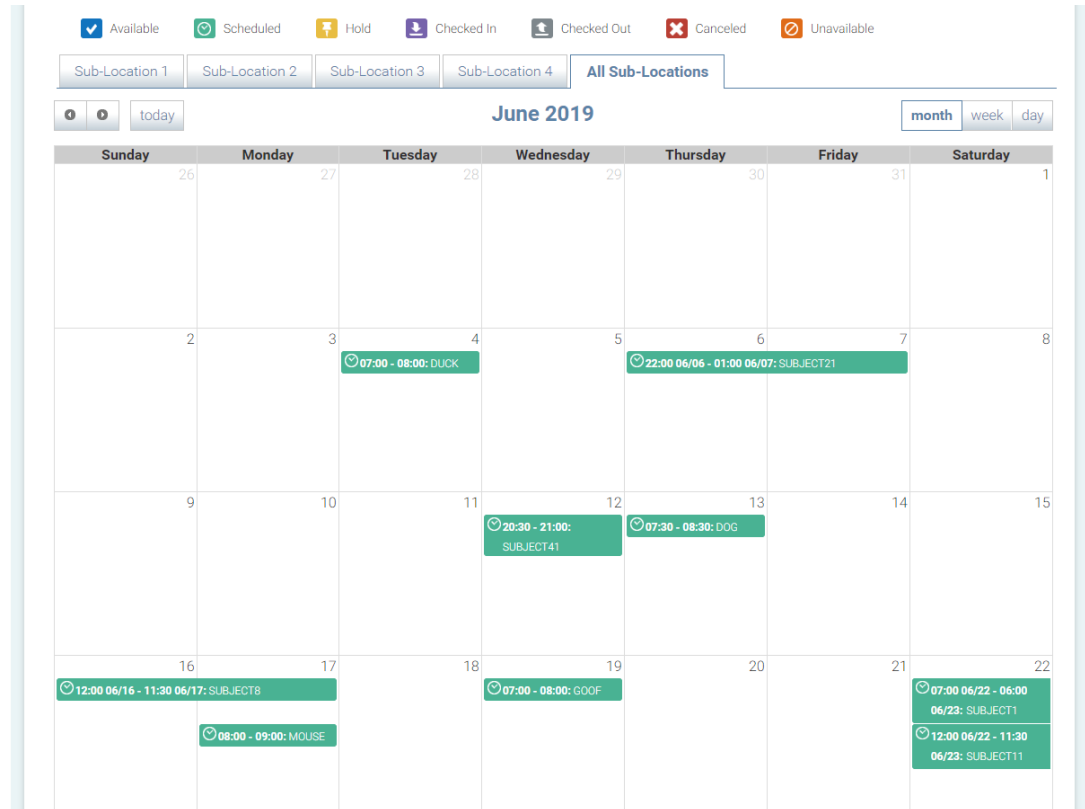
Schedule

Close



CAN I SEE ALL MY SCHEDULED APPOINTMENTS?

- Your home screen shows appointments for all studies you have access to
- Click on the appointment to see full details



SCHEDULING DETAILS

- *You must use the room assigned by Scheduler and be out by the designated end time.*
- *You have a 15 minute buffer to clean the room*
- *All participants must be checked out after the appointment in the dashboard*
- *You will not receive an Outlook invitation with appointment details*
- *Appointments less than 7 days in advance must be made by Scheduler staff to ensure that they are added to EPIC.*



SCHEDULER DASHBOARD

- *All study staff members should obtain access to the dashboard in order to update participants' status while in the clinic*
- *This will be used to notify the nursing team or APP that you are ready for their services and to alert the clinic when you have completed your visit*
- *Please contact Chris Caldwell
(Christopher.Caldwell@cuanschutz.edu) for access*



WHO DO I CONTACT FOR HELP?

- *All appointment requests for visits less than 7 days in advance should be sent to ctrcheduler@ucdenver.edu*
- *Please visit our website for links to tutorials, access forms, and MRN request forms: <https://cctsi.cuanschutz.edu/resources/ctrc/scheduler>*



QUESTIONS?

