



Colorado Clinical & Translational Sciences Institute

# INTRODUCTION TO CTRC SCHEDULER



# SCHEDULER TEAM

- *Janine Higgins: Director of Operations*
- *Jenni Cathcart: Scheduling Manager*
- *D'Andra Mixon-Walker: Scheduler*
- *Archana Mande: Remote Scheduler Support*



# 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 WILL SCHEDULER BE USED FOR?

- *ALL inpatient and outpatient CTRC study visits will now be set up through Scheduler*
- *This includes :*
  - *Rooms*
  - *Nursing services*
  - *PA services*
  - *Nutrition services*
  - *EBL: Exercise, DEXAs*
  - *Cardiovascular imaging*



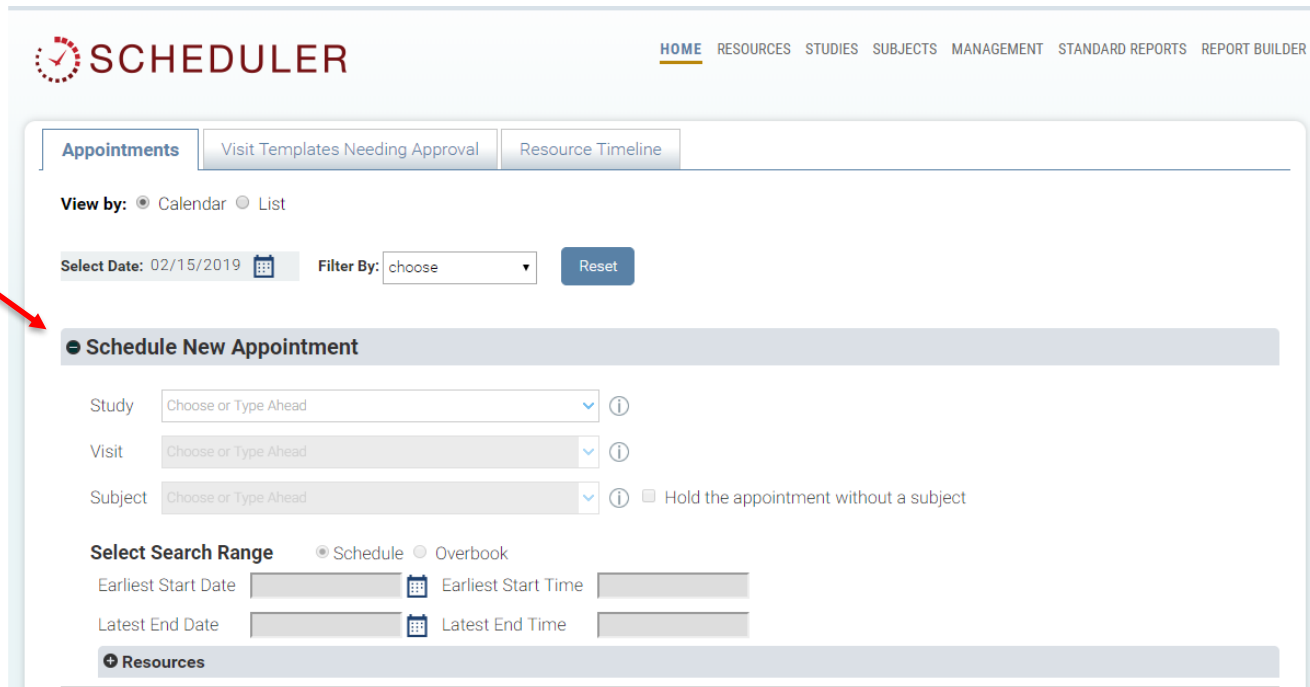
# HOW DOES SCHEDULER WORK?

- *All studies will have visit workflows prepared by the Scheduler staff and entered into the application*
- *All study staff will have access to the studies they work on*
- *Study staff will add participants to their studies in Scheduler 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 the SCHEDULER logo and links for HOME, RESOURCES, STUDIES, SUBJECTS, MANAGEMENT, STANDARD REPORTS, and REPORT BUILDER. Below the navigation bar, there are tabs for Appointments, Visit Templates Needing Approval, and Resource Timeline. The Appointments tab is active. Underneath, there are options for View by (Calendar and List) and a date selection field (02/15/2019) with a calendar icon and a Filter By dropdown menu. A red arrow points to the 'Schedule New Appointment' button, which is highlighted in a grey bar. Below this button, there are three dropdown menus for Study, Visit, and Subject, each with a 'Choose or Type Ahead' prompt and an information icon. There is also a checkbox for 'Hold the appointment without a subject'. Below these fields, there is a 'Select Search Range' section with radio buttons for Schedule and Overbook, and four input fields for Earliest Start Date, Earliest Start Time, Latest End Date, and Latest End Time, each with a calendar icon. At the bottom, there is a 'Resources' section with a plus icon.



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

Subject: DUCK, DONALD - 987654 (M) (Hold the appointment without a subject)

Select Search Range:  Schedule  Overbook

Start Date: 11/02/2018 Start Time: 07:00

End Date: 11/14/2018 End Time: 12:00

Specific days:  All Weekdays  Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday

Resources: [Restart] [Search]

Available Scheduled Hold Checked In Checked Out Canceled Unavailable

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

today November 2018 month week day

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	31	1	2	3
	<ul style="list-style-type: none"><li>07:00 - 09:30: DUCK</li><li>08:30 - 11:00: DUCK</li><li>09:00 - 13:00: DOG</li></ul>	<ul style="list-style-type: none"><li>07:00 - 10:00: DUCK</li><li>14:00 10/30 - 06:00 11/01: MOUSE</li></ul>	<ul style="list-style-type: none"><li>07:00 - 15:00: DUCK</li><li>07:30 - 10:30: DOG</li><li>09:00 - 15:00: MOUSE</li></ul>	<ul style="list-style-type: none"><li>07:00 - 08:30: GOOF</li><li>08:30 - 11:30: DUCK</li></ul>	<ul style="list-style-type: none"><li>07:00 - 10:00</li><li>07:30 - 10:30</li><li>07:30 - 10:30: MOUSE</li><li>08:00 - 11:00</li><li>08:30 - 11:30</li><li>09:00 - 12:00</li></ul>	
	4	5	6	7	8	9
	<ul style="list-style-type: none"><li>07:00 - 10:00</li><li>07:30 - 13:30: GOOF</li><li>07:30 - 10:30</li><li>08:00 - 11:00</li><li>08:30 - 11:30</li><li>09:00 - 12:00</li></ul>	<ul style="list-style-type: none"><li>07:00 - 13:00: DUCK</li><li>07:00 - 10:00</li><li>07:30 - 10:30</li><li>08:00 - 11:00</li><li>08:30 - 11:30</li><li>09:00 - 12:00</li></ul>	<ul style="list-style-type: none"><li>07:00 - 11:00: DOG</li><li>07:00 - 11:00: DUCK</li><li>07:00 - 11:00: MOUSE</li><li>07:00 - 10:00</li><li>07:30 - 10:30</li><li>08:00 - 11:00</li><li>08:30 - 11:30</li><li>09:00 - 12:00</li></ul>	<ul style="list-style-type: none"><li>07:00 - 10:00</li><li>07:30 - 10:30</li><li>08:00 - 11:00</li><li>08:30 - 11:30</li><li>09:00 - 12:00</li><li>09:00 - 11:30: DUCK</li><li>09:00 - 10:00: DOG</li><li>09:30 - 12:30: GOOF</li></ul>	<ul style="list-style-type: none"><li>07:00 - 10:00</li><li>07:30 - 12:30: DUCK</li><li>07:30 - 12:30: DUCK</li><li>07:30 - 12:30: GOOF</li><li>07:30 - 10:30</li><li>08:00 - 11:00</li><li>08:30 - 11:30</li><li>09:00 - 12:00</li></ul>	
						10





# 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
<input type="checkbox"/> Infusion Chair 1 - Sub-Location 3	03/07/2019 07:00	03/07/2019 11:00
<input type="checkbox"/> Nurse - Sub-Location 3	03/07/2019 07:00	03/07/2019 11:00

**Comment:**   
255 characters remaining



# 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

Legend: Available (blue checkmark), Scheduled (green circle), Hold (yellow T), Checked In (purple download), Checked Out (grey download), Canceled (red X), Unavailable (orange circle with slash).

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

today | June 2019 | month | week | day

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
26	27	28	29	30	31	1
2	3	4 07:00 - 08:00: DUCK	5	6 22:00 06/06 - 01:00 06/07: SUBJECT21	7	8
9	10	11	12 20:30 - 21:00: SUBJECT41	13 07:30 - 08:30: DOG	14	15
16 12:00 06/16 - 11:30 06/17: SUBJECT8	17 08:00 - 09:00: MOUSE	18	19 07:00 - 08:00: GOOF	20	21	22 07:00 06/22 - 06:00 06/23: SUBJECT1 12:00 06/22 - 11:30 06/23: SUBJECT11



# WHAT HAS CHANGED?

- *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 check out after the appointment*
- *You will not receive a confirmation email. Look at the calendar to verify.*



# WHAT HAPPENS NEXT?

- *All study staff members should attend a hands-on training session in April*
- *Scheduler staff will send prepared study visit workflows to study teams for approval*
- *Scheduler goes live MAY 7 for all studies*



# WHO DO I CONTACT FOR HELP?

*Jenni Cathcart: Scheduling Manager*

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**QUESTIONS?**

