CTRC SCHEDULER

Hands-On Training
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
Beginning **May 7th**, you will use the 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/
- PIs must submit an Access form for each protocol: http://www.ucdenver.edu/research/CCTSI/programs-services/scheduler/Pages/default.aspx
Practice: Confirming You are Added to a Study

- From the Homepage, click the **Studies** Tab
- All studies the coordinator works on will be visible
Practice: Creating a New Study Subject

- Select the **Subjects** tab
- Click **Create New Subject** button
- Complete all demographic information
- Enter MRN
- Select the study from the dropdown menu
- Click Save
Practice: Scheduling a New Visit

- Click the Home tab
- Click the (+) sign to open the Schedule New Appointment Dropdown
- Select the study
- Select the visit
- Select newly added patient
- Search a single day or a visit window
- Use military time when selecting the start time and end time range
- Click **Search**
- 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:
- Nutrition template

Click Schedule button
Scheduling Nutrition Services

- When scheduling Nutrition services, insert the Nutrition Template into the “Comments” box

- Appointments with the comments will appear in the calendar

**Nutrition Template**

1. Specific diet type (XX lead-in days or meal)
2. Dates needed
3. Pick-up date(s) and time(s)
4. Kcals
5. Study Condition

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**Example:**

```
Jun 06, 2019 07:00 - Jun 06, 2019 10:00

<table>
<thead>
<tr>
<th>Resource Name</th>
<th>Resource Start Time</th>
<th>Resource End Time</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meal, Regular - Sub-Location 1</td>
<td>05/06/2019 07:00</td>
<td>05/06/2019 08:00</td>
<td>Specify diet type (e.g., 50 lead-in days or meal)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Meal (breakfast) Dates Needed: 5/6/19</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Pick-up date(s) and time(s): nil/nil/nil</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>(Study Condition: Study Day)</td>
</tr>
</tbody>
</table>
```
Please Remember:

■ All services must be scheduled at least 7 business days in advance
  - EBL: 48 hours
  - Nutrition: 10 calendar days

■ To request a late-add appointment:
  1. Search for the timeslot you want in the Scheduler to ensure it is available
  2. Contact the core directly
  3. The core will approve or decline the visit
  4. The core will enter the 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

- **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
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
What to Remember when Using the Scheduler:

- You must use the assigned room as designated by the CTRC Scheduler
- You must exit the room by the appointment end-time
- 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 as **GREEN** on the calendar
- The core will need to be contacted for all visits scheduled AND cancelled less than seven days prior to the visit
- No more outlook scheduling requests beginning May 1st, 2019
Questions?
Contact us with any questions/feedback!

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