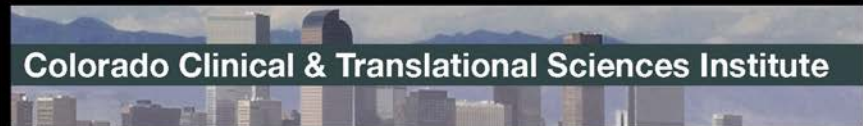


# CTRC SCHEDULER

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

WHY?

# Beginning **May 7<sup>th</sup>**, 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/>
- Pls must submit an Access form for each protocol:  
<http://www.ucdenver.edu/research/CCTSI/programs-services/scheduler/Pages/default.aspx>

The screenshot displays the Harvard Catalyst Scheduling System website. At the top left, the word "SCHEDULER" is prominently displayed next to a red circular icon with a white checkmark. To the right of this header, there are input fields for "Username" and "Password", followed by a blue "Log In" button. Below the login fields, there are links for "Register" and "Forgot My Password".

The main content area features a white box with the following text: "The Harvard Catalyst Scheduling System is a web-based application that provides clinical research center (CRC) and study staff a tool to manage resources, collect data, and schedule research subjects for study visits. The scheduling system reduces the amount of time CRC staff must spend scheduling resources and increases the ability of study teams to manage their own study visits. The scheduling system also captures meaningful data on resource usage and staff demand that can be used for both operating and reporting purposes."

At the bottom of the page, there are logos for "HARVARD CATALYST" and "THE HARVARD CLINICAL AND TRANSLATIONAL SCIENCE CENTER" on the left, and "CU" and "CCTSI" on the right. A footer section contains the text: "To report issues, give comments, ask questions, please mail to: [Thomas.Yaeger@ucdenver.edu](mailto:Thomas.Yaeger@ucdenver.edu) Sending PHI through email is strictly prohibited." Below this, a small disclaimer states: "The use of this application is for business purposes only. Your use of this application is monitored and a record of access may be reviewed by the institution and may be made available to authorized persons, including the subject, upon request. By using this application, you agree to keep any information found within private. Unauthorized use or disclosure of subject PHI (Protected Health Information) is strictly prohibited."

# Practice: Confirming You are Added to a Study

The screenshot shows the SCHEDULER web application interface. The navigation menu at the top includes HOME, RESOURCES, STUDIES (highlighted with a red arrow), SUBJECTS, MANAGEMENT, STANDARD REPORTS, and REPORT BUILD. Below the navigation, the breadcrumb path is 'Home > Studies List'. The main content area is titled 'Studies' and includes a 'Display Records: 50' dropdown, 'Page 1 of 1' indicator, and a 'Go' button. A 'Create New Study' button is located in the top right corner. The main content is a table with the following columns: Name, PI Last Name, PI First Name, IRB Number, Local ID, Study Status, and a 'View Detail' link. The table lists ten study records, all with a status of 'OPEN' and PI names 'Cathcart' and 'Jennifer'.

Name	PI Last Name	PI First Name	IRB Number	Local ID	Study Status	
01-1234	Cathcart	Jennifer	01-1234	01-1234	OPEN	<a href="#">View Detail</a>
13-0220: Study breakfast conditions' effects on blood levels of common lipid and glycemic biomarkers	Cathcart	Jennifer	13-0220	13-0220	OPEN	<a href="#">View Detail</a>
13-2594: Effects of interrupting sedentary time on glycemic control in older overweight and obese adults	Cathcart	Jennifer	13-2594	13-2594	OPEN	<a href="#">View Detail</a>
14-1297: Assessing tenofovir pharmacology in older HIV infected individuals receiving tenofovir-based antiretroviral therapy	Cathcart	Jennifer	14-1297	14-1297	OPEN	<a href="#">View Detail</a>
14-2155: Is levothyroxine alone adequate thyroid hormone replacement for all patients?	Cathcart	Jennifer	14-2155	14-2155	OPEN	<a href="#">View Detail</a>
15-0474: Dysregulation of FSH in Obesity: Functional Statistical Analysis	Cathcart	Jennifer	15-0474	15-0474	OPEN	<a href="#">View Detail</a>
15-1412: Lipoprotein lipase enzyme activity assay validation and clinical assessment	Cathcart	Jennifer	15-1412	15-1412	OPEN	<a href="#">View Detail</a>
16-1355: Evaluation of intravenous and intraperitoneal pharmacokinetics of dalbavancin in peritoneal dialysis patients	Cathcart	Jennifer	16-1355	16-1355	OPEN	<a href="#">View Detail</a>
17-0356: Cardiovascular Mechanisms of Exercise Intolerance in Diabetes and the Role of Sex	Cathcart	Jennifer	17-0356	17-0356	OPEN	<a href="#">View Detail</a>
19-0000 Clamp Test Templates	Cathcart	Jennifer		19-0000	OPEN	<a href="#">View Detail</a>

- From the Homepage, click the **Studies** Tab
- All studies the coordinator works on will be visible


# Practice: Creating a New Study Subject

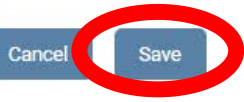
- Select the **Subjects** tab
- Click **Create New Subject** button

The screenshot displays the SCHEDULER web application interface. The top navigation bar includes the SCHEDULER logo and a menu with items: HOME, RESOURCES, STUDIES, **SUBJECTS** (circled in red), MANAGEMENT, STANDARD REPORTS, and REPORT BUILDER. Below the navigation bar, the breadcrumb trail reads "Home > Subjects". The main content area features a "Search Subject List" section with three input fields: "MRN", "Last name, First name", and "Birthdate MM/DD/YYYY" (with a calendar icon). A "Search" button is positioned to the right of these fields. On the far right of the search section, the "Create New Subject" button is circled in red. Below the search fields, there is a "Filter by gender:" section with several checked checkboxes: Male, Female, Female to Male, Male to Female, Unreported, and Declined.

### 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: 100px;"></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"/>		



- 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

The screenshot displays the SCHEDULER application interface. At the top right, the navigation menu includes 'HOME', 'RESOURCES', 'STUDIES', 'SUBJECTS', 'MANAGEMENT', and 'ST'. The 'HOME' tab is circled in red. Below the navigation, there are three tabs: 'Appointments', 'Visit Templates Needing Approval', and 'Resource Timeline'. The 'Appointments' tab is active. Underneath, there are view options: 'View by:  Calendar  List'. A date selection field shows 'Select Date: 03/18/2019' with a calendar icon, a 'Filter By:' dropdown menu set to 'choose', and a 'Reset' button. A large red arrow points to a button labeled '+ Schedule New Appointment'. At the bottom, there is a legend for appointment statuses: Available (blue checkmark), Scheduled (green checkmark), Hold (yellow pushpin), Checked In (purple download), Checked Out (grey upload), Canceled (red X), and Unavailable (orange circle with slash).

- 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**

### Schedule New Appointment

Study   Investigator: Jennifer Cathcart

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**

- 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

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

Subject: DUCK, DONALD - 987654 (M) (1) 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

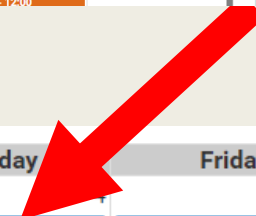
Restart Search

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
	07:00 - 09:30: DUCK 08:30 - 11:00: DUCK 09:00 - 13:00: DOG	07:00 - 10:00: DUCK 14:00 10/30 - 06:00 11/01: MOUSE	07:00 - 15:00: DUCK 07:30 - 10:30: DOG 09:00 - 15:00: MOUSE	07:00 - 08:30: GOOF 08:30 - 11:30: DUCK	07:00 - 10:00 07:30 - 10:30 07:30 - 10:30: MOUSE 08:00 - 11:00 08:30 - 11:30 09:00 - 12:00	
4	5	6	7	8	9	10
	07:00 - 10:00 07:30 - 13:30: GOOF 07:30 - 10:30 08:00 - 11:00 08:30 - 11:30 09:00 - 12:00	07:00 - 13:00: DUCK 07:00 - 10:00 07:30 - 10:30 08:00 - 11:00 08:30 - 11:30 09:00 - 12:00	07:00 - 11:00: DOG 07:00 - 11:00: DUCK 07:30 - 11:00: MOUSE 07:00 - 10:00 07:30 - 10:30 08:00 - 11:00 08:30 - 11:30 09:00 - 12:00	07:00 - 10:00 07:30 - 10:30 08:00 - 11:00 09:00 - 12:00 09:00 - 11:30: DUCK 09:00 - 10:00: DOG 09:30 - 12:30: GOOF	07:00 - 10:00 07:30 - 12:30: DUCK 07:30 - 12:30: DUCK 07:30 - 12:30: GOOF 08:00 - 11:00 08:30 - 11:30 09:00 - 12:00	



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	1	2	3	4	5	6
	07:00 - 10:00	07:00 - 10:00	07:00 - 10:00	07:00 - 10:00	07:00 - 10:00	

- Select the visit that works best with your patient's availability
- The "comment" box can be used to enter:
  - Nutrition template
- Click **Schedule** button

### Appointment Details

**Local ID:** 13-0220  
**Investigator:** Jennifer Cathcart  
**Visit:** Visit 1  
**Subject:** No Subject Assigned  
**MRN:** N/A  
**Gender:** N/A  
**Visit Start Time:** 04/04/2019 07:00  
**Visit End Time:** 04/04/2019 10:00

Fixed  Float  Float Group  Flex

Resource Name	Start Time	End Time
<input type="checkbox"/> Infusion Chair 1 - Sub-Location 1	04/04/2019 07:00	04/04/2019 10:00
<input type="checkbox"/> Nurse 1 - Sub-Location 1	04/04/2019 07:15	04/04/2019 07:45
<input type="checkbox"/> Meal, Weighed-Controlled - Sub-Location 1	04/04/2019 07:30	04/04/2019 07:45
<input type="checkbox"/> Nurse 1 - Sub-Location 1	04/04/2019 08:00	04/04/2019 08:15
<input type="checkbox"/> Nurse 1 - Sub-Location 1	04/04/2019 08:30	04/04/2019 08:45
<input type="checkbox"/> Nurse 1 - Sub-Location 1	04/04/2019 09:00	04/04/2019 09:15

**Comment:**

255 characters remaining

# 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

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

<b>Subject</b>	SUBJECT
MRN	54 TEST
Gender	888054
Birth Date	Male
Local ID	03/31/1964
IRB #	TA-007
Visit Name	Visit 1
Visit Type	Outpatient
Sublocation	CRC
Is part of the Visit Off Unit?	Sub-Location 1
Check-In	NO
Check-Out	
Comment	

Resource Name	Resource Start Time	Resource End Time	Comment
Meal, Regular - Sub-Location 1	06/06/2019 07:00	06/06/2019 08:00	Specify diet type (XX lead-in days or meal): Meal (breakfast) Dates Needed: 6/6/19 Pick up date(s) and time(s): 6/6/19 at 8am Kcals: 500 Study Condition: Study A

# 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**

3	4	5	6
10	11	12	13

- **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

17	18	19	20
		 07:00 - 09:30: DOG	 07:00 - 08:00: GLENWOOD



# 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

Nurse 1 - Sub-Location 1		03/05/2019 08:30	03/05/2019 08:45	<a href="#">Edit</a>   <a href="#">Delete</a>
Nurse 1 - Sub-Location 1		03/05/2019 09:00	03/05/2019 09:15	<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](#)

# 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 1<sup>st</sup>, 2019

Questions?

# Contact us with any questions/feedback!

- Jennifer Cathcart  
720-848-6661
- D'Andra Mixon  
720-848-5520

CTRC Scheduler Direct Email:  
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