



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 CTRC cores
 - 2. Increase efficiency and ease of scheduling
 - 3. Allow for scheduling in real time





WHAT IS SCHEDULER USED FOR?

- ALL inpatient and outpatient CTRC 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





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

Appointments	Visit Templates Needing App	roval Resource Timeline	e			
View by: Ca 	lendar 🔍 List					
Select Date: 02/	15/2019 Filter By: choose	Reset				
	_					
Schedule	New Appointment					
Study C	oose or Type Ahead	~ (i)				
Visit		 ① 				
Visit C Subject C		 ① ① 	Hold the appointm	ent without a subjec	t	
Visit Subject Select Se	ioose or Type Ahead ioose or Type Ahead i rch Range	verbook	Hold the appointm	ent without a subjec	t	



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

Study	11111 - Sub3 Study 1	 Investigator: Jennifer Cathcart
Visit	Visit 1	✓ (j) Visit Duration: 150 minutes (2 hr, 30 min)
Subject	DUCK, DONALD - 987654 (M)	 ✓ (i) ■ Hold the appointment without a subject
Select Stort Dr	Search Range Schedule Overbook	07:00
Select Start Da	Search Range Schedule Overbook ate 02/15/2019 Start Tim e 02/22/2019 End Time	e 07:00
Select Start Date Start Date Specific	Search Range Schedule Overbook ate 02/15/2019 Start Tim e 02/22/2019 Schedule Content of the test of te	ne 07:00 e 12:30 2 Wednesday



- 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





6. Review the appointment details and click *Schedule*

isit Summar	/		
tudy:	Sub3 Study 1		
ocal ID:	11111		
nvestigator:	Jennifer Cathcart		
/isit:	Visit 2		
ubject:	DAISY DUCK		
IRN:	765432		
ender:	Female		
isit Start Time:	03/07/2019 07:00		
isit End Time:	03/07/2019 11:00		

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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 <u>must use the room assigned</u> by Scheduler and be out by the designated end time.
- You have a 15 minute buffer to clean the room
- All participants <u>must be checked out</u> 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



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 <u>ctrcscheduler@ucdenver.edu</u>
- Please visit our website for links to tutorials, access forms, and MRN request forms: <u>https://cctsi.cuanschutz.edu/resources/ctrc/schedu</u> <u>ler</u>





QUESTIONS?



