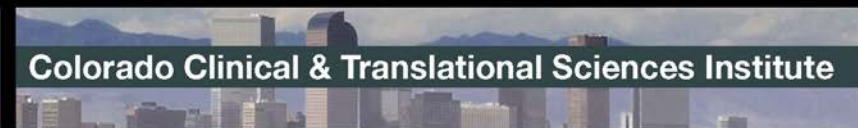


CTRC SCHEDULER

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

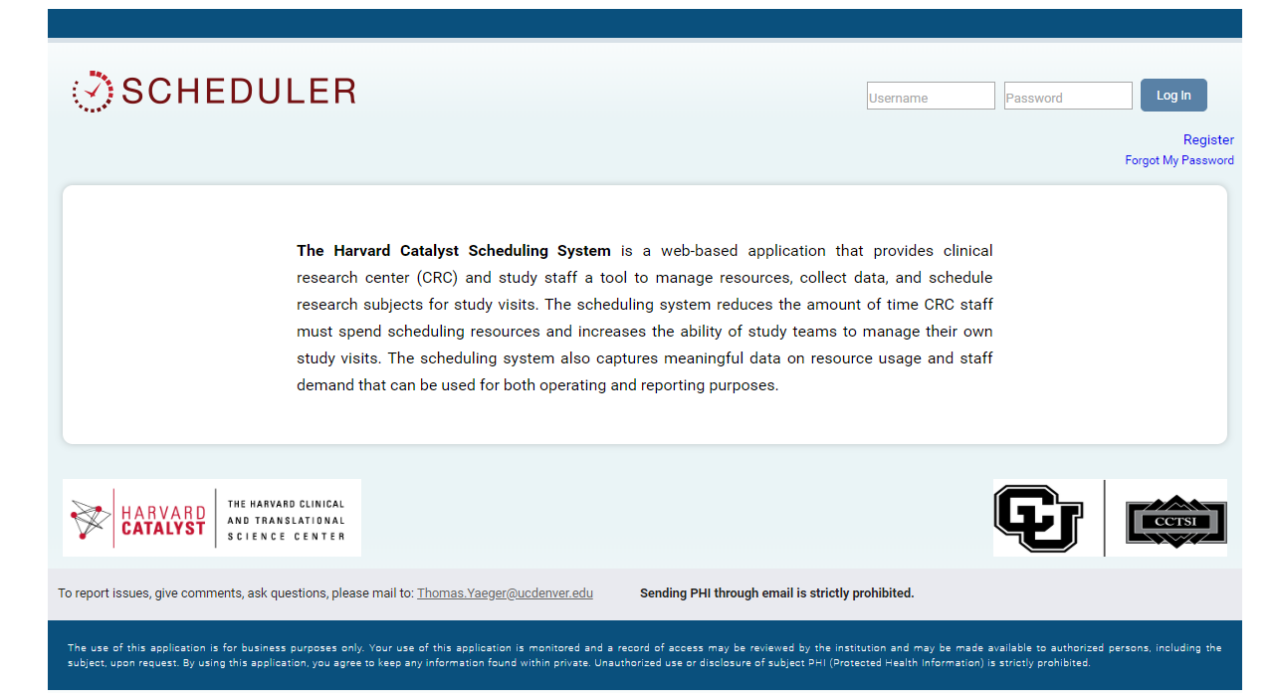
WHY?

Beginning **May 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/>
- 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 login interface for the Harvard Catalyst Scheduling System. At the top, the word "SCHEDULER" is prominently displayed in red, accompanied by a circular icon with a checkmark. To the right, there are input fields for "Username" and "Password", followed by a "Log In" button. Below these fields, there are links for "Register" and "Forgot My Password". A central text box provides a description of the system: "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, 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 contact information: "To report issues, give comments, ask questions, please mail to: Thomas.Yaeger@ucdenver.edu" and a warning: "Sending PHI through email is strictly prohibited." A final line of small text at the very bottom 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

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

SCHEDULER

HOME RESOURCES **STUDIES** SUBJECTS MANAGEMENT STANDARD REPORTS REPORT BUILD

Home > Studies List

Studies

Display Records: 50 Page 1 of 1 Go [Create New Study](#)


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

Practice: Creating a New Study Subject

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

The screenshot displays the SCHEDULER web application interface. At the top, the navigation bar includes links for HOME, RESOURCES, STUDIES, **SUBJECTS** (highlighted with a red circle), MANAGEMENT, STANDARD REPORTS, and REPORT BUILDER. Below the navigation bar, the breadcrumb trail shows "Home > Subjects". The main content area features a "Search Subject List" section with input fields for MRN, Last name, First name, and Birthdate MM/DD/YYYY, along with a "Search" button. To the right of the search section, the "Create New Subject" button is highlighted with a red circle. Below the search section, there is a "Filter by gender:" section with checkboxes for Male, Female, Female to Male, Male to Female, Unreported, and Declined.

- Complete all demographic information
- Enter MRN
- Select the study from the dropdown menu
- Click **Save**









SCHEDULER

[HOME](#)
[RESOURCES](#)
[STUDIES](#)
[SUBJECTS](#)
[MANAGEMENT](#)
[STANDARD REPORTS](#)
[REPORT BUILDER](#)


[Home](#) > [Subjects](#) > [Create New Subject](#)

Create New Subject



* = Required

First Name *	<input type="text"/>	Street Address 1 *	<input type="text"/>	Add to Study	Choose or Type Ahead 
Middle Name/Initial	<input type="text"/>	Street Address 2	<input type="text"/>	Comment	<div></div>
Last Name *	<input type="text"/>	City *	<input type="text"/>		
Gender *	Choose or Type Ahead 	State	Choose or Type Ahead 		
Race *	Choose or Type Ahead 	Zipcode *	<input type="text"/>		
Ethnicity *	Choose or Type Ahead 	Country *	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"/>		

Cancel
Save


HARVARD CATALYST

THE HARVARD CLINICAL
AND TRANSLATIONAL
SCIENCE CENTER

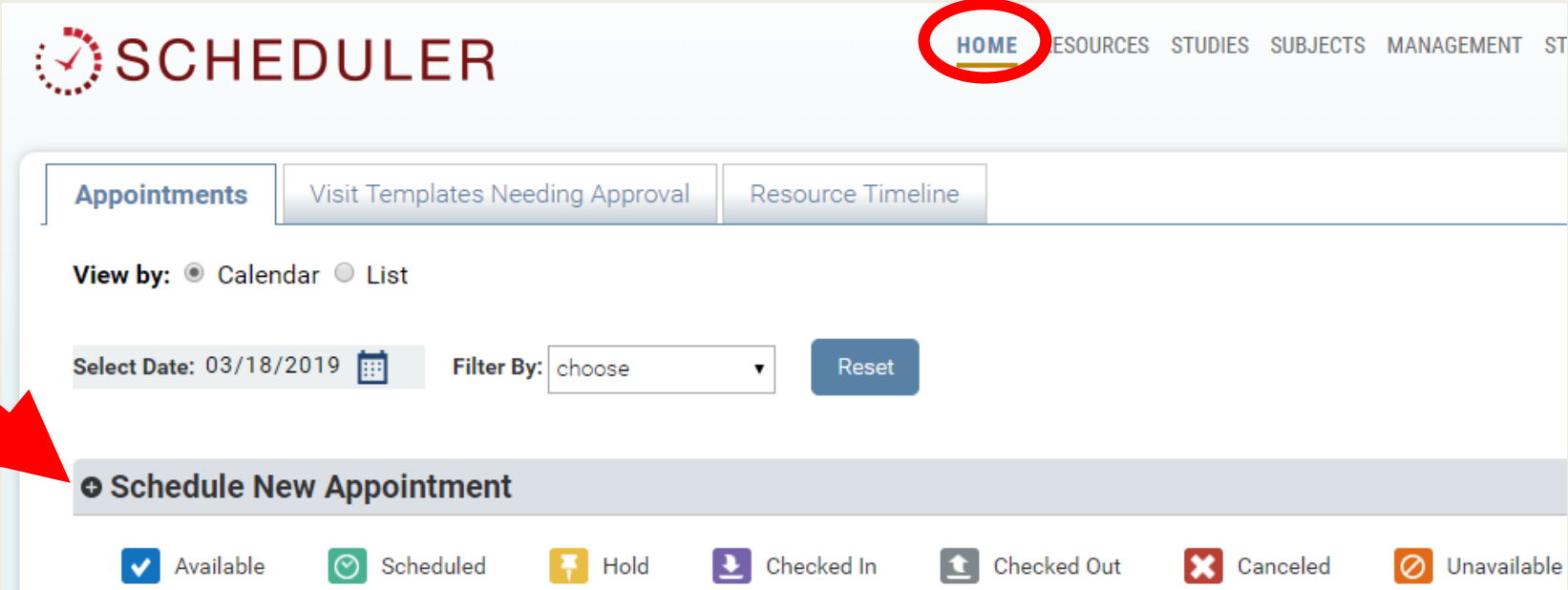



To report issues, give comments, ask questions, please mail to: Thomas.Yaeger@ucdenver.edu

Sending PHI through email is strictly prohibited.

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, the 'HOME' tab is highlighted with a red circle. Below the navigation bar, the 'Appointments' section is active, showing options for 'Visit Templates Needing Approval' and 'Resource Timeline'. The 'View by' section has radio buttons for 'Calendar' (selected) and 'List'. The 'Select Date' field shows '03/18/2019' with a calendar icon, and the 'Filter By' dropdown is set to 'choose'. A red arrow points to the '+ Schedule New Appointment' button. At the bottom, a status bar includes icons and labels for 'Available', 'Scheduled', 'Hold', 'Checked In', 'Checked Out', 'Canceled', and 'Unavailable'.

SCHEDULER






HOME RESOURCES STUDIES SUBJECTS MANAGEMENT ST

Appointments Visit Templates Needing Approval Resource Timeline

View by: ☒ Calendar ☐ List

Select Date: 03/18/2019  Filter By: choose  **Reset**

+ Schedule New Appointment

☒ Available ☒ Scheduled  Hold  Checked In  Checked Out  Canceled  Unavailable

- 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

13-0220: Study breakfast conditions' effects on bl...
Visit 1

Investigator: Jennifer Cathcart

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

06/03/2019

Start Time

07:00

End Date

06/08/2019

End Time

10:00

Specific days

☒ All Weekdays ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday
☐ Saturday ☐ Sunday

+ Resources

Restart

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

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
	<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 - 11:30: DUCK</div> <div>09:00 - 10:00: DOG</div> <div>09:30 - 12:30: GOOF</div>	<div>07:00 - 12:30: DUCK</div> <div>07:30 - 12:30: MOUSE</div> <div>07:30 - 12:30: 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>	

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

Schedule

Close

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

Subject SUB-JECT
54 TEST
MRN 888054
Gender Male
Birth Date 03/31/1964
Local ID TA-007
IRB #
Visit Name Visit 1
Visit Type Outpatient
CRC
Sublocation Sub-Location 1
Is part of the Visit Off Unit? NO
Check-In
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
			🕒 07:00 - 13:00: DUCK
10	11	12	13

- **Green:** scheduled
- **Orange:** Unavailable resources
- **Blue:** Available to schedule
- **Gray:** Completed Visits
- **Purple:** Patient has Checked-In
- **Red:** Cancelled

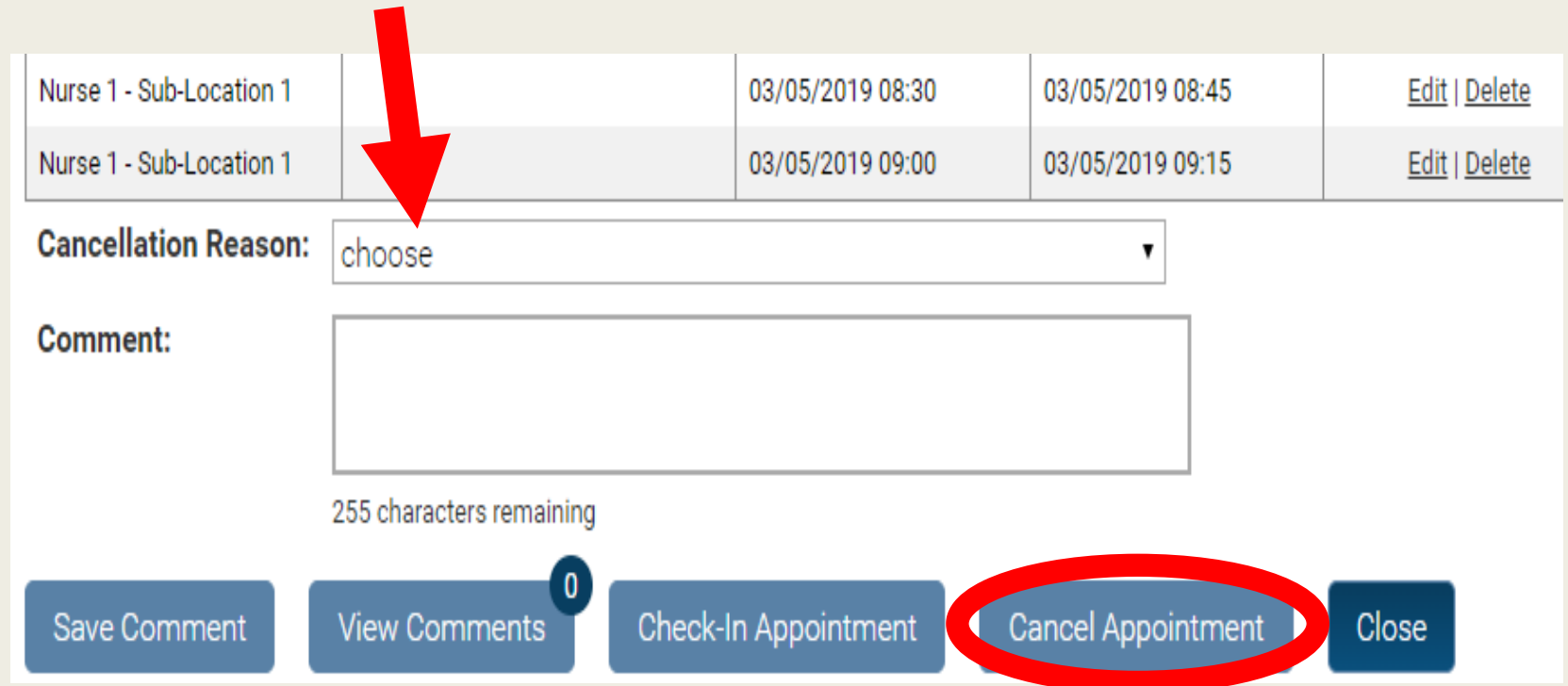
Practice: Confirming Check-In and Check-Out

- 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	Edit Delete
Nurse 1 - Sub-Location 1		03/05/2019 09:00	03/05/2019 09:15	Edit Delete

Cancellation Reason: choose ▼

Comment:

255 characters remaining

[Save Comment](#) [View Comments](#) [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 1st, 2019

Questions?

Contact us with any questions/feedback!

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

CTRC Scheduler Direct Email:
ctrcscheduler@ucdenver.edu