



CTR Scheduling System

User Guide

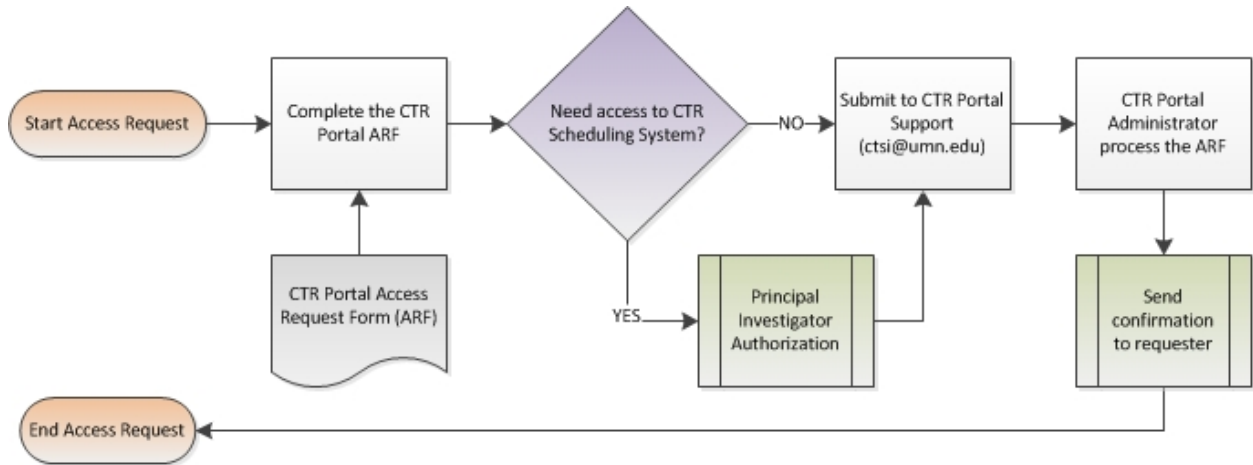
A guide for study staff.

**By CTR Portal Support
6/4/2014**

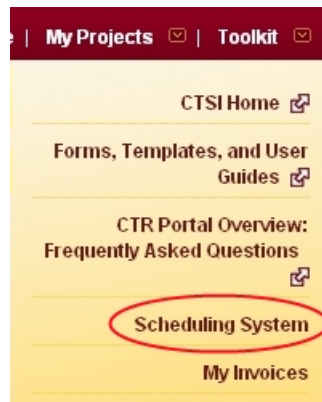
Table of Contents

Access.....	3
Manage Study	4
My Studies.....	4
Study Details	5
Study Staff.....	6
Study Subjects.....	7
Scheduled Visits	7
Adding Subjects.....	8
Schedule Events	9
Calendar	9
Navigation.....	10
View Preference.....	10
Create an event.....	11
Quick-Add Form	11
Advanced Form.....	12
Details	12
Resources.....	12
Subjects and Services.....	13
Attachments.....	13
Reporting Tools.....	14

Access



Once access has been granted, users access the Portal using <https://ctsi.ahc.umn.edu/portal/>. To reach the Scheduling System use the link in the Toolkit.



Scheduling System



CALENDAR



MANAGE STUDIES



REPORTS

Manage Studies

Clicking on the Manage Studies icon from Scheduling System main page will direct the user to the studies he/she is associated with.

My Studies

This section lists all the studies the user has access to. The user can search for a specific study by using the search function. Search is limited to the following information.

- CTSI Number – a unique number to identify a project in the CTR Portal.
- Short Title – a short description of the project.
- Subject – the number of subjects enrolled in the project.

Once a study is found, click on the CTSI # or Short Title of the study to access the study's details.

[Portal Home](#) > [Scheduling System](#) > [My Studies](#)

My Studies

Show entries

CTSI Number	Short Title	Subject
20282	Sitagliptin to Improve Outcomes After Islet Autotransplant	0
20331	Test Project	0
20559	Big Bird's Test Project	0

Showing 1 to 3 of 3 entries (filtered from 203 total entries)

[← Previous](#) [1](#) [Next →](#)

Study Details

The Study tab will show minimal information about the study.

CTSI ID 20331: Test Project

Study	Staff	Subjects	Scheduled
CTSI ID			
20331			
Full Title			
Test Project			
Short Title			
Test Project			
TASCS Number			

Study Staff

CTSI ID 20331: Test Project

Study **Staff** Subjects Scheduled

List of staff

Show All Show Active

Show 10 entries

Name	X.500	Roles	Phone	Email	Status	Scheduling Access
Johnson, Aaron		Co-Investigator			Active	Access
Melcher, Emily		Principal Investigator			Active	Access

Showing 1 to 2 of 2 entries

← Previous 1 Next →

- Show All – click this button to display all.
- Show Active – click this button to display only the active person.
- Show X entries – choose the number of people per page to display.
- Search – type in the search field to filter the list.
- Scheduling Access – indicate access to the scheduling system.

Study Subjects

CTSI ID 20331: Test Project

Study Staff **Subjects** Scheduled

List of subjects

Show All Show Active

Show 10 entries

Subject ID	Last Name	First Name	Gender	Status
No data available in table				

Showing 0 to 0 of 0 entries

← Previous Next →

[Add Subject](#)

- Add Subject – click this button to open the Add Subject form.

Scheduled Visits

CTSI ID 20331: Test Project

Study Staff Subjects **Scheduled**

List of scheduled visits

Show All Show Upcoming [Scheduled](#) [Complete](#) [Cancelled](#) [No Show](#)

Show 10 entries

Date	Last Name	First Name	Subject ID	Location	Status
No data available in table					

Showing 0 to 0 of 0 entries

← Previous Next →

- Show Upcoming – display all events scheduled now and in the future.
- Scheduled – toggle ON (blue) to show events with the status of Scheduled.
- Complete – toggle ON (blue) to show events with the status of Complete.
- Cancelled – toggle ON (blue) to show events with the status of Cancelled.
- No Show – toggle ON (blue) to show events with the status of No Show.

Adding Subjects

To add subjects to the study, navigate to the Subjects tab of the Study Details and click on the Add Subject button.

Add New Subject Active Inactive Save Subject

Basic Information

<p>Subject ID <input type="text"/> <small>If used, must be unique to study</small></p> <p>First Name <input style="border: 1px solid red;" type="text"/> <small>Subject name is required</small></p> <p>Middle Name <input type="text"/></p> <p>Last Name <input style="border: 1px solid red;" type="text"/></p> <p>Birthdate <input type="text" value="MM"/> <input type="text" value="DD"/> <input type="text" value="YYYY"/> <small>clear</small></p>	<p>Ethnicity <input type="radio"/> Hispanic or Latino <input type="radio"/> Not Hispanic or Latino</p> <p>Race <input type="checkbox"/> American Indian or Alaskan Native <input type="checkbox"/> Asian <input type="checkbox"/> Black or African American <input type="checkbox"/> Native Hawaiian or Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Other Race <input type="checkbox"/> Does not wish to disclose</p> <p>Gender <input type="radio"/> Female <input type="radio"/> Male</p>
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Contact Information

PREFERRED METHOD OF CONTACT
+ Add another method of contact

Miscellaneous

<p>Marital Status <input type="text" value="Select status"/></p> <p>Previous Last Name <input type="text"/></p> <p>Fairview Medical Number <input type="text"/></p>	<p>Emergency Contact Name <input type="text"/></p> <p>Emergency Contact Phone Number <input type="text"/></p> <p>Emergency Contact Relationship <input type="text"/></p>
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- Active/Inactive – status of subject record.
- Save Subject – save the changes to the subject record.
- Subject ID – if used, must be unique to the study.
- First Name/Last Name – subject name is required.
- To cancel – close the form and discard any changes.

Schedule Events

Clicking on the Schedule Events icon from Scheduling System main page will direct the user to his/her default calendar. The default view is set by the user’s view preference on today’s date.

Calendar

DCRU ▾
MCRU
LCRU
ECRC
CNBD

Back ▾
01/01/2015
Forward ▾
Today
Thursday, Jan 1, 2015
Select resources to view
Create New Event

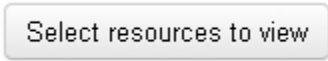
	1	2	3	4	5	6	7	8	9	10	11
8am											
9am											
10am											
11am											
12pm											
1pm											
2pm											
3pm											

Navigation

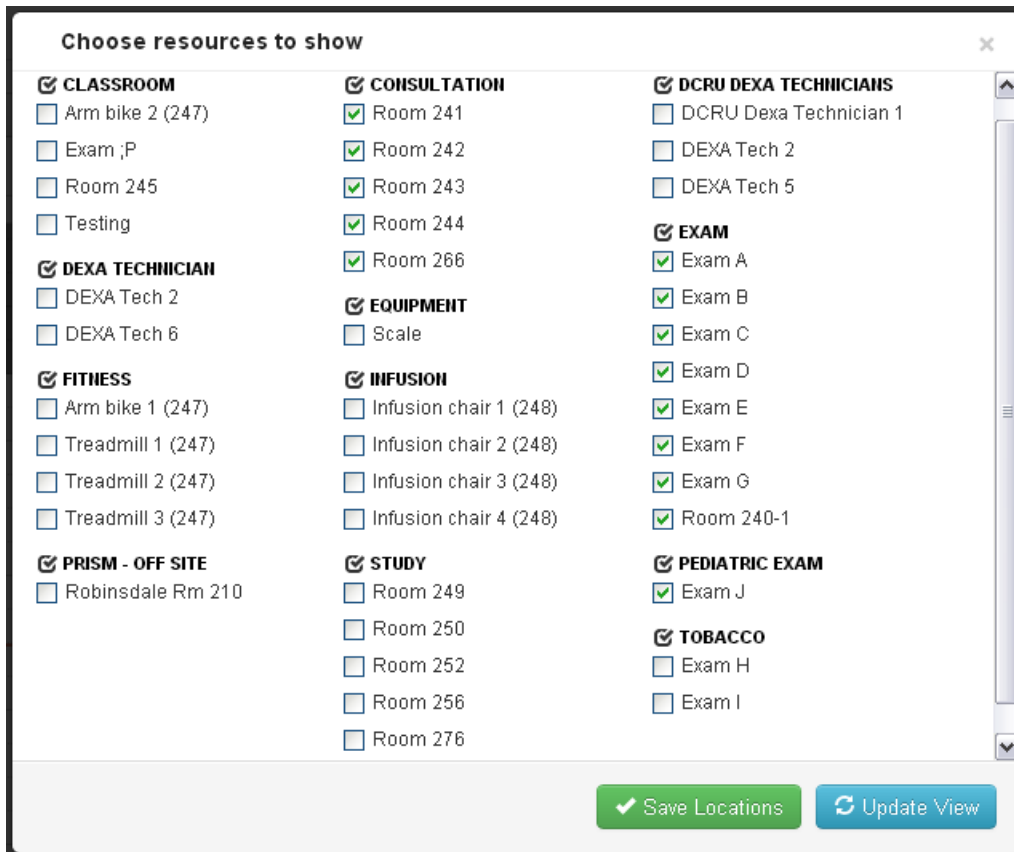


- Back – go back one day, one week, one month, or one year.
- Date – select a specific date using a pop-up mini calendar.
- Forward – go forward one day, one week, one month, or one year.
- Today – go to today’s date.

View Preference



Clicking on the “Select resources to view” button will open the view preference window. Use the view preference to add/remove specific room or resources to the calendar.



- Save Locations – click this button to save the view preference.
- Update View - click this button to close the preference window and refresh the calendar.

Create an event

Click & drag on the calendar to quickly add a new event. Use the quick-add form to quickly reserve an event.

Quick-Add Form


Exam E: Thu, May 9, 10:00am – 11:00am (1 hour) x

Details

Visit Type

Project

Notes

Standard of Care 

- x – click this to close and cancel the quick-add form.
- Visit Type – choose from Visit, Unscheduled Visit, or “Space Only” to describe the event type.
- Project – choose the project associated to the event.
- Save Reservation – click this button to save the event without subjects nor services.
- Edit Reservation – click this button to open the advanced form.

Advanced Form

Make reservation

Save reservation

Cancel

Reservation

Subjects and services

Details


Visit Type

Choose visit type

Project

Choose project

Notes

Standard of Care 

Resources

Note: When scheduling please observe each facility's same-day policy and hours of operation.

Toggle details

of resources

1

per visit

Repeat Pattern

One time only

Date	Facility	Start Time	Duration	Resource Type	Resource
05/09/2013	DCRU	Choose time	Hr Mi	--	--

Search Availability

- Save reservation – click this button to save the event details and reserve the selected resource(s).
- Cancel – click this button to close the Advanced Form and discard any changes.
- Subjects and services – click this tab to assign subjects and their associated services.

Details

- Notes – add additional information like coordinator name & contact #.
- Visit Type – choose from Visit, Unscheduled Visit, or “Space Only” to describe the event type.
- Project – choose the project associated to the event.

Resources

- # of resources per visit – choose the number of resources needed for the event.
- Repeat Pattern – choose from “One time only”, “Study Specific”, Daily, “Every weekday (Mon-Fri)”, “Every Mon., Wed., and Fri.”, “Every Tues. and Thurs” or Weekly.
- Date – choose the specific date of the event.
- Facility – choose from DCRU, MCRU, etc. depending on user’s access.
- Start Time – choose the start time of the event.
- Duration – choose the length of the event. User must enter Hour and Minute.
- Resource Type – choose the type of resource (ie. room) needed for the event.

- Resource – depending on availability, choose the appropriate resource for the event.
- Search Availability – click the button to search for availability based on the information above.

User Tip:

- *Some visits require multiple resources to be defined depending on the services provided (i.e. a DEXA resource must be paired with a DEXA/PQCT Tech resource). Contact the facility where the visit will take place for verification.*

Subjects and Services

Make reservation

Save reservation

Cancel

Reservation

Subjects and services

Assigned Subjects

Name

Visit Services

Dietary Needs

Parking Passes

Add Subject

- Add Subject – click the button to select a subject for the event.

Attachments

Attachments can be uploaded after the event has been created.

Attachments

+ Add files...

Start upload

Cancel upload

Delete

[Show category definitions](#)

20130508 Sched Syst - FileAttach.png

--- Select Category ---



Required

Start

Cancel

- + Add files - click this button to browse for a file to upload.
- Start – click this button to start uploading the file.
- Cancel – click this button to cancel the upload of file.

[20130508 Sched Syst - FileAttach.png](#)

Date the document was uploaded:

05/08/2013

Physicians Orders

Delete

- Click on the file link to open the file.
- Delete – click this button to delete the file.




Reporting Tools

Reports

- [Legacy Facility Agenda](#) - Ideal for Excel/PDF exports
- [New Facility Agenda](#) - Improved interface and added functionality. Exports are a work in progress. New

- **Legacy Facility Agenda** – a report of events for a specific facility and date range. Additional filters are available to fine tune the report.

Portal Home > Scheduling System > Reports > Facility Agenda


Facility: <input type="text" value="DCRU"/>	Event Type: <input type="text"/>	Study ID: <input type="text"/>	   <input type="button" value="Reload"/>
Resource: <input type="text"/>	Date Range: From: <input type="text" value="06/04/2014"/> To: <input type="text" value="06/04/2014"/> Today	<input type="checkbox"/> Room Assignments <input type="checkbox"/> Limit to Standard of Care only	

- Usage includes but not limited to:
 - A report of events for the current date including the resource reserved.
 - A report of events for the current date for a particular study.
 - A report of events in a month for a particular study.

- **New Facility Agenda** – an improved Facility Agenda report that shows events for a specific facility and date range. Additional filters are available to fine tune the report.

Portal Home > Scheduling System > Reports > Facility Agenda

Facility All my facilities	Project All my projects	Resource All resources
Date Range to	Visit Services Any services	Dietary Needs Any services
▶ Run Report		

With subjects [More formats](#) [Room assignments](#)  **0**
Results

- Usage includes but not limited to:
 - A report of events with subjects
 - A report of Space Only events
 - A report of Non-clinical events
 - A report of events with standard of care