

HCCRC SCHEDULING SYSTEM ROLES AND PERMISSIONS

Home:	CRC Staff					
Function	General View	Front Desk	Study Staff	Scheduler	Resource Manager	Super Admin
Under 'Appointments' Tab:	Y	Y	Y	Y	Y	Y
View all appointments	Y	Y		Y	Y	Y
View only appointments for studies of which they are a member			Y			
View deidentified calendar of all appointments (no subject data)			Y			
View individual confirmed appointment details for all studies	Y	Y		Y	Y	Y
View individual confirmed appointment details for studies of which they are a member			Y			
View appointment history via Appointment List View						Y
Schedule appointments for all studies		Y		Y	Y	Y
Schedule appointments only for studies of which they are a member			Y			
Overbook appointments				Y	Y	Y
Add/edit/delete resources for an existing appointment				Y	Y	Y
Run overbook check on all appointments				Y		Y
Comment on all scheduled or checked-in appointments		Y		Y	Y	Y
Comment on all scheduled or checked-in appointments on studies of which they are a member			Y			
View comments on all appointments		Y		Y	Y	Y
View comments on all appointments for studies of which they are a member			Y			
Check-In appointments- Calendar View		Y		Y	Y	Y
Check-In appointments- List View		Y		Y	Y	Y
Check-Out appointments- Calendar View		Y		Y	Y	Y
Check-Out appointments- List View		Y		Y	Y	Y
Edit Check-In/ Check-Out statuses (list view)				Y	Y	Y
Cancel scheduled appointments for all studies (calendar view)		Y		Y	Y	Y
view)				Y	Y	Y
Cancel only appointments for studies of which they are a member			Y			
Reschedule cancelled appointments				Y	Y	Y
Schedule and view all hold appointments				Y	Y	Y
View hold appointments for studies of which they are a member			Y			
Switch or remove a subject from a scheduled appointment				Y	Y	Y
Under 'Visit Templates Needing Approval' Tab:				Y	Y	Y
View all visit templates needing approval				Y	Y	Y
Approve visit templates				Y	Y	Y

Under 'Resource Timeline' Tab:	Y	Y	Y	Y	Y	Y
View resource utilization Gantt charts	Y	Y		Y	Y	Y
View resource utilization Gantt charts with PHI data hidden			Y			

Resources:

Function	CRC Staff					
	General View	Front Desk	Study Staff	Scheduler	Resource Manager	Super Admin
View Resource Listing	Y	Y	Y	Y	Y	Y
View Individual Resource Details	Y	Y	Y	Y	Y	Y
Edit Resources					Y	Y
Add Resources					Y	Y
View Sub-Locations Closures				Y	Y	Y
Add/Delete Sub-Locations Closures				Y	Y	Y
View Default Availability	Y	Y	Y	Y	Y	Y
View Temporary Adjustments	Y	Y	Y	Y	Y	Y
View Alternative Resources	Y	Y	Y	Y	Y	Y
Add/Edit/Delete Default Availability					Y	Y
Add/Edit/Delete Alternative Resources					Y	Y
Add/Edit/Delete Temporary Adjustment					Y	Y

Studies:

Function	CRC Staff					
	General View	Front Desk	Study Staff	Scheduler	Resource Manager	Super Admin
View a list of all studies		Y		Y	Y	Y
View only a list of studies of which they are a member			Y			
View study details, visit templates, subjects and members		Y		Y	Y	Y
View study details, visit templates, subjects and members only in studies of which they are a member			Y			
Edit study details (overview, identification, funding and contacts)					Y	Y
Change study status (Open, Pending, Closed)					Y	Y
Create a visit template		Y		Y	Y	Y
Edit a visit template		Y		Y	Y	Y
Approve a visit template		Y		Y	Y	Y
Comment on a visit template		Y	Y	Y	Y	Y
Copy visit template					Y	Y
Delete visit template						Y
Activate/Deactivate visit template					Y	Y

Add a subject to a study		Y	Y	Y	Y	Y
Activate/Deactivate a study subject on a particular study		Y	Y	Y	Y	Y
Add a study member to a study		Y		Y	Y	Y
Activate/Deactivate a study member on a particular study		Y		Y	Y	Y
Create a new study						Y

Subjects:

Function	CRC Staff					
	General View	Front Desk	Study Staff	Scheduler	Resource Manager	Super Admin
Search subjects for which they have MRN or combination of Name and DOB		Y	Y	Y	Y	Y
Add subjects to the system		Y	Y	Y	Y	Y
Edit a study subject's demographic information		Y	Y	Y	Y	Y
Activate/Deactivate a subject system-wide		Y		Y	Y	Y

Management:

Function	CRC Staff					
	General View	Front Desk	Study Staff	Scheduler	Resource Manager	Super Admin
Create a New User						Y
Activate/Deactivate a User						Y
Edit Users						Y
Change another user's password						Y
Change Password	Y	Y	Y	Y	Y	Y

Reporting:

Function	CRC Staff					
	General View	Front Desk	Study Staff	Scheduler	Resource Manager	Super Admin
Generate standardized reports on visit data	Y	Y		Y	Y	Y
Create customized reports (Ad Hoc)						Y
Report Builder						Y