

THE HARVARD CLINICAL AND TRANSLATIONAL SCIENCE CENTER

Quick Start Guide: Scheduling Appointments

In this guide, you will learn how to schedule study visits in the HCCRC Scheduling System through the Search New Appointment Wizard. In order to schedule appointments, you need to know the name of the study, the study subject's name, the appropriate visit template, a desired window of dates and times, and resources required. This guide will walk you through the following actions.

Navigate to the Appointment Wizard

To schedule your appointment, navigate to the Home Module...

SCHEDULER	HOME	RESOURCES	STUDIES	SUBJECTS	MANAGEMENT	STANDARD REPORTS	REPORT BUILDER
Appointments Visit Templates Needing Approval	Resource Timeline						

Expand the *Schedule New Appointment* Button located just above the appointment icons on the Home screen...

< Sched	ule New Appointment		
Study	Choose or Type Ahead	(j)	
Visit		(i)	
Subject		() 🗆 Ho	old the appointment without a subject
Select S	Search Range Schedule Overbook		
Earliest	Start Date 📰 Earliest Start Tim		
Latest E	nd Date 🔲 🛗 Latest End Time		
🛛 🛠 Res	ources		

Selecting Appointment Search Criteria

First, the *Select a Study* dropdown will be enabled. Select the study for which you would like to schedule a visit, or begin typing the Study Local ID or Study Name to filter the dropdown list. Once a study is selected, you can view the Study Investigator to the right of the dropdown.

tudy	Choose or Type Ahead 🗸 🗸	0
sit	A-009 - Photophobia	0
ubject	A-017 - EEG changes with meditation: A proposal to analyze	$$ \blacksquare Hold the appointment without a subject
Select S	A-018 - Green light effects on migraine	
Earliest	A-019 - A Randomized, Multicenter, Double-blind, Parallel, Start Date	
Latest E	End Date 📶 Latest End Time	

NOTE: Only OPEN studies to which you have been assigned will be displayed

Next, the *Visit Template* dropdown will be enabled. Select a Visit Template, or begin typing the Visit Template Name to filter the dropdown list. Once a visit is selected, you can view the visit duration to the right of the dropdown

Sched	ule New Appointment		
Study	A-009 - Photophobia	,	✓ (j) Investigator: study staff201
Visit	ERG Visit Only		 i) Visit Duration: 105 minutes (1 hr, 45 min)
Subject	Choose or Type Ahead		✓ (j) ■ Hold the appointment without a subject
Select S	earch Range	Overbook Start Time	07:00
End Date	01/30/2020	End Time	08:45
Specific	days All Weekdays Monday	y 🔲 Tuesday 🔲 We	ednesday 🗹 Thursday 📃 Friday
⊗ Reso	ources		

NOTE: Only Visit Templates that are Active and Approved will display in this list.

Next, the Subject dropdown will be enabled. Entries in the Subject dropdown have the format 'Last Name, First Name – MRN (Gender)'. Select a subject or begin typing a Subject Name to filter the dropdown list.

	ule New Appointment		
Study	A-009 - Photophobia	(j)	Investigator: study staff201
Visit	Choose or Type Ahead 🗸	(
Subject	Choose or Type Ahead 🗸	1	Hold the appointment without a subject
Select S	SUBJECT21051, TEST - 909051 (M to F)		
Earliest	SUBJECT21073, TEST - 909073 (U)		
Latest E	SUBJECT21074, TEST - 909074 (D)		
✓ Res	SUBJECT21112, TEST - 909112 (M)		

NOTE: Only subjects that you have added to your study will display in this list.

Some users will notice the "Hold the appointment without a subject" check box. When this box is checked, a CRC user can hold the appointment without selecting a subject.

You will then be asked to enter a desired search range. The Scheduler System can review appointment availability over a desired window of date and time ranges – it is not limited to a single date and time.

To select your start and end date, click on the Calendar Icon next to the date box to display a calendar for the next 3 months of the year. Users can select a date by clicking a day displayed in the Calendar.

tudy	A-009 - F	Photoph	obia							٣	① Investigator: study staff201 ③ Visit Duration: 105 minutes (1 hr, 45 min)												
/isit	ERG Visi	t Only								Y													
ubject	SUBJEC	T21051	, TEST	- 9090	51 (M	to F)				~	0	Ho	ld the	e app	ointme	ent wit	hout a	a sub	ject				
Cdaut Dat			a a a a l		-	•			Time	- E				_									
Start Dat End Date	e	01/30/	Jan	- 2	• 20) 20	•	Start	Time		67:00 Febri	uary 2	2020					Mar	ch 20	020		0	
Start Dat End Date Specific (days	01/30/ O Su	Jan Mo	Tu	• 20 We))20 Th	• Fr	Start Sa	Time Su	Мо	07:00 Febri Tu	uary 2 We	2020 Th	Fr	Sa	Su	Мо	Mar Tu	ch 20 We	020 Тh	Fr	0 Sa	
Start Dat End Date Specific	days	0 Su	Jan Mo	Tu	• 20 we)20 Th	• Fr	Start Sa	Time Su	Мо	07:00 Febri Tu	we	2020 Th	Fr	Sa 1	Su 1	Mo	Mar Tu 3	ch 20 We	020 Th	Fr 6	0 Sa	
Start Dat End Date Specific o Reso	days	0 Su	Jan Mo	Tu	• 20 We) 20 π	• Fr 10	Start Sa	Su 2	Mo	07:00 Febri Tu	we	2020 Th	Fr 7	Sa 1 8	Su 1 8	Mo 2 9	Mar Tu 3	We 4	20 Th 5	Fr 6 13	0 Sa 7 14	
Start Dat End Date Specific (Reso	e days	01/30/ O Su	2020 Jan Mo	Tu 7 14	• 20 We))20 Th	• Fr 10 17	Start Sa	Su 2 9	Mo 3 10	07:00 Febri Tu 4	We 5	2020 Th 6 13	Fr 7 14	Sa 1 8 15	Su 1 8 15	Mo 2 9 16	Mar Tu 3 10 17	We 4 11 18	020 Th 5 12 19	Fr 6 13 20	0 Sa 7 14 21	Se
Start Dat End Date Specific (days	0 Su	2020 Jan Mo 0. 13. 20	Tu 7 14 21	• 20 We 11 0 15 72))20 Th	• Fr -3 10 17 24	Start Sa	Su 2 16	Mo 3 10 17	07:00 Febri Tu 4 11 18	We 5 12 19	2020 Th 6 13 20	Fr 7 14 21	Sa 1 8 15 22	Su 1 8 15 22	Mo 2 9 16 23	Mar Tu 3 10 17 24	we 4 11 18 25	720 Th 5 12 19 26	Fr 6 13 20 27	0 Sa 7 14 21 28	Se

To select a time, click on the Time Entry Box to display a Time Picker.

< Scheo	dule New Appo	intment							
Study	A-009 - Photophobia	1	~	i) Investigator:	study staff201				
Visit	ERG Visit Only		~	① Visit Duration	: 105 minutes (1 h	r, 45 min)			
Subject	SUBJECT21051, TES	ST - 909051 (M to F)	×	① ■ Hold the a	appointment witho	ut a subject			
Select S	Search Range	® Schedule ◎ Ov	erbook						
Start Da	ate 01/30/202	0	Start Time	07:00					
End Dat	te 01/30/202	0	End Time	Cho	ose Time				
Specific	c days	kdays Monday	Tuesday 🗏 Wedr	Time 07:00					
⊗ Ret	sources	ay 🖶 Sunday		Hour 07 •					
				Minute 00 •			Restart	Search	
					Done	e		_	
	dable 🧖 Baba	4.1.4 🗖 4.44	Charles In	Charled Out	Constant of	C Unavaila	a. 🗂 e.a.		
View Selec	v by: Calendar Total Calendar Calendar Content	 List Image: Filter By: v Appointment 	choose •	Reset					
	🗸 Available 🔇	Scheduled 👎	Hold D Check	ed In 👤 Chee	ked Out 🗙 Ca	anceled ⊘	Unavailable	Booked <24 H	ours
G	Gryzmish Non	CRC Off Institut	ion All Sub-Lo	ocations					
<	> today	1		January	2020			month week	day
	Sunday	Monday	Tuesday	Wednesd	ay Thurs	sday	Friday	Saturda	/
								0	4 -
	29		[⊙] 17:00 12/31 - 09:00	02/03: TESTER002		2		3	4
	29	30	҈ 17:00 12/31 - 09:00	02/03: TESTER002	8	2		3	11
©1	29 5 7:00 12/31 - 09:00 02/0	30 6 13: TESTER002	♡17:00 12/31 - 09:00	02/03: TESTER002 7	8	9		3	11
ା ଅ	29 5 7:00 12/31 - 09:00 02/0 12	30 6 33: TESTER002 13	♡ 17:00 12/31 - 09:00	02/03: TESTER002 7 14	8	9	· · · · · · · · · · · · · · · · · · ·	3	4

NOTE: Time is in Military Format.

By default, the Start Date/Time must occur before the End Date/Time. Additionally, the search range must not be shorter than the visit duration of the appointment. If you attempt to search with an invalid date/timerange, you will see the following validation...

Select Searc	h Range 🛛 💿	Schedule		
Start Date	10/05/2017	🔝 Start Time	07:00	Please enter valid date range
End Date	10/05/2017	🔝 End Time	07:15	
Select Search	n Range 💿 S	chedule		enders also the state of the st
Start Date	10/13/2017	🔝 Start Time 07	7:00	Start Date/Time is after End Date/Time
End Date	10/13/2017	🛗 End Time 🛛 06	5:30	

In some cases, your subject may be unavailable for particular days of the week. If so, you can also uncheck specific days to filter out unnecessary appointment days for the application to review.

Specific days	📄 All Weekdays 📄 Monday 📄 Tuesday 🖉 Wednesday 🖉 Thursday 🖉 Friday
Specific days	📄 Saturday 📄 Sunday

Once the Study and Visit are specified, you can view the Resources for the visit in the Resources table.

	, _ ,					
Resources						
Display Records: 50 🔶	Page 1 of 1 Go					
Resource Name	\$	Start Time	•	End Time		\$
All Rooms - ACC		(Day: 1) 00:00		(Day: 1) 01:15		
Assistant/Tech, Med - ACC		(Day: 1) 00:45		(Day: 1) 01:00		
Assistant/Tech, Med - ACC		(Day: 1) 01:00		(Day: 1) 01:15		
7 Outpt Consult - ACC		(Day: 1) 01:15		(Day: 1) 01:30		
					Restart	Search

If you are ready to find available appointments, click on the *Search* button.

Review Available Appointments

Once the application completes its review of available appointments, your calendar will display orange boxes that show all unavailable appointments and blue boxes that show all available appointments from your search.

🗸 Available	🕙 Scheduled 🗧 👎	Hold Decked In	1 Checked Out	X Canceled	🖉 Unavailable	
CNY WHT 12	WHT 13 Non C	RC Off Institution	All Sub-Locations			
0 0 today		ľ	March 2017			month week day
Sunday	Monday	Tuesday	Wednesday 21506 - 16:00: INDIA	Thursday	Friday ♥ 09:00 - 09:45 ♥ 09:20 - 10:15 ♥ 10:20 - 11:15 ♥ 11:20 - 11:15 ♥ 11:20 - 12:15 ♥ 12:20 - 12:15 ♥ 12:20 - 12:15 ♥ 12:20 - 12:15 ♥ 12:00 - 12:45 ♥ 12:00 - 12:45 ♥ 12:00 - 12:45 ♥ 12:00 - 12:45 ♥ 12:00 - 12:45 ♥ 12:00 - 12:45 ♥ 12:00 - 18:45 ♥ 14:20 - 18:45 ♥ 15:20 - 18:45	Saturday

Click on an orange box to open up the *Appointment Details* window for an unavailable appointment and get information as to why the visit is unavailable during the particular time.

Appointment	Details									
visit Summar	у									
Study:	The Diabe	tes Prevention Progr	am Outcomes Study							
Local ID:	0625									
Investigator:	study staf	f144								
Visit:	DXA Only	DXA Only								
Subject:	RAY ASHF	RAY ASHFORD								
MRN:	888044	888044								
Gender:	Female	Female								
Visit Start Time:	03/31/2017 09:30									
Visit End Time:	03/31/20	17 10:15								
Fixed III Float	◆ Float	Group 🗣 Flex	• • • •	Display Una Display Ava Display Bot Available	available Resource: ilable Resources h Reason for Unavailability					
Dietitian, Research	- WHT 13	03/31/2017 09:30	03/31/2017 10:00	×	Default Availability - Quantity (3) Exhausted					
_		02/21/2017 00:20	02/21/2017 10:15	×	Default Availability - Quantity (1)					

NOTE: All of the resources in your template have to be available in order to schedule a visit.

Click on a blue box to open up the *Appointment Details* window to get the resource information for an available visit. If you would like to schedule the appointment, click on the *Schedule* button...

Appointment Details								
Visit Summar	у							
Study:	 The Diabetes Prevention Program Outcomes Study 							
Local ID:	0625							
Investigator:	study staff144							
Visit:	DXA Only							
Subject:	RAY ASHFORD							
MRN:	888044							
Gender:	Female							
Visit Start Time:	03/31/2017 10:30							
Visit End Time:	03/31/2017 11:15							
🗖 Fixed 🔳 Float	♦♦ Float Group 🐁 Flex							
Posouroo Namo		Start Time	End Time					
Distition Research	WHT 12	Start Time	End Time					
Distition Research - WHT 13		03/31/2017 10:30	03/31/2017 11:15					
Disentian, research - with 13		03/31/2017 10:30	03/31/2017 11:15					
Comment:								
ooninient.								
255	characters remaining							
Schedule	Close							

Once you confirm your appointment, your appointment will display in green in the calendar. You have successfully scheduled your visit.

SCHE	DULER		но	ME RESOURCES	STUDIES SUBJECTS	MANAGEMENT STANDARD RE
Appointments	Resource Timeline					
View by: Calen Select Date: 10/04/ Schedule No	dar 🛛 List 2017 🛅 Filter By: ch	pose 🛟	Reset			
Vailable	Scheduled	Hold 💽 Checke	ed In 🚺 Checked Out	Canceleo	d 👩 Unavailat	ble
Available	Scheduled []	Hold Checke NICU Tower	ed In 💽 Checked Out	Canceled	d 🕢 Unavailat	ole
Available ACC CTC	Scheduled 5	Hold J Checke	ed In Checked Out r 9 Non CRC Off Ins October 2017	Canceleo	Unavailat	month week day
Available ACC CTC CT O O toda Sunday	Scheduled CTH Meal Pick Up y Monday	Hold Decke NICU Tower Tuesday	ed In Checked Out r 9 Non CRC Off Ins October 2017 Wednesday	Canceled titution A	d Ounavailat	month week day
Available ACC CTC CTC CO O O toda	Scheduled CTH Meal Pick Up Monday	Hold Decker	ed In Checked Out P Non CRC Off Ins October 2017 Wednesday TESTER005	Cancelee itution A	d O Unavailat	ne month week day Saturday
Available ACC CTC toda toda Sunday Sunday TESTER103	Scheduled T CTH Meal Pick Up Monday	Hold E Checke NICU Tower	ed In Checked Out P Non CRC Off Ins October 2017 Wednesday TESTER005 TESTER005	Cancelec itution A	Unavailat	ne month week day Saturday
Available ACC CTC CTC Control Contro Control Contro Control Control Control Control Control Control C	Scheduled CTH Meal Pick Up y Monday	Hold Checke NICU Tower Tuesday	ed In Checked Out P Non CRC Off Ins October 2017 Wednesday TESTER005 TESTER005 TESTER005 TESTER01 TESTER01	Cancelectitution A	d Ounavailat	ne month week day Saturday

If there are no appointments available during your search or if you prefer another date and time range, you can expand the Schedule Appointment section to edit the search details and re-run the search.

K today January 2020						month week day
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29			1	2	3	4
		O 17:00 12/31 - 09:00 02/	03: TESTER002			
5	6	7	8	9	10	11
⊙17:00 12/31 - 09:00 02/03:	TESTER002					
12	13	14	15	16	17	18
☉ 17:00 12/31 - 09:00 02/03:	TESTER002					
		☉ 11:15 - 14:15: SUBJECT19097				
19	20	21	22	23	24	25
⊙ 17:00 12/31 - 09:00 02/03:	TESTER002					
26	27	28	29	30	31	1
O 17:00 12/31 - 09:00 02/03:	TESTER002					
			© 07:00 - 08:45: SUBJECT21051 © 08:00 - 09:45 SUBJECT21051 Visit Na Room(s Comme	• 07:00 - 08:00: TESTER001 : A-009 e: staff201 mme: ERG Visit): int(s): 0	Only	

Note that appointments scheduled within a certain amount of time of the appointment start time (defined by each institution) will have a dash border. The appointment hover will have an indicator to indicate how many comments there is(are) for the appointment.