

**HARVARD
CATALYST**

THE HARVARD CLINICAL
AND TRANSLATIONAL
SCIENCE CENTER

Quick Start Guide: Scheduling Appointments

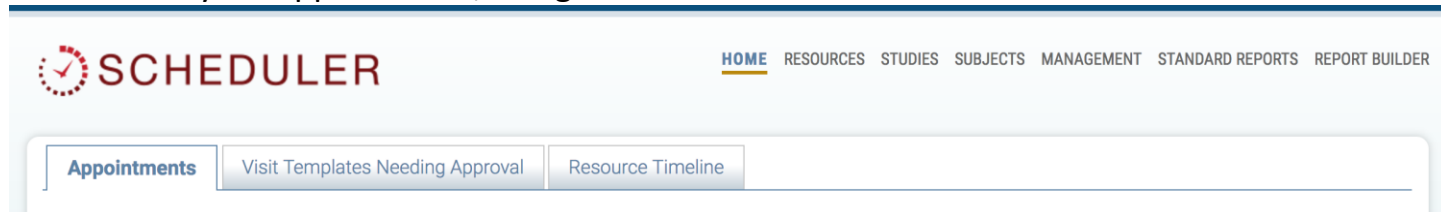
In this guide, you will learn how to schedule study visits in the HCCRC Scheduling System through the Search New Appointment Wizard. In order to schedule appointments, you need to know the name of the study, the study subject's name, the appropriate visit template, a desired window of dates and times,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

Questions? Please reach out to the HCCRC Scheduler Support Team
help desk - harvardcatalyst.zendesk.com
email - support@harvardcatalyst.zendesk.com

Updated 10/26/2017

Navigate to the Appointment Wizard

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



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

⌵ Schedule New Appointment

Study

Choose or Type Ahead

⌵

ⓘ

Visit

Choose or Type Ahead

⌵

ⓘ

Subject

Choose or Type Ahead

⌵

ⓘ

☐ Hold the appointment without a subject

Select Search Range

☒ Schedule ☐ Overbook

Earliest Start Date

📅

Earliest Start Time

Latest End Date

📅

Latest End Time

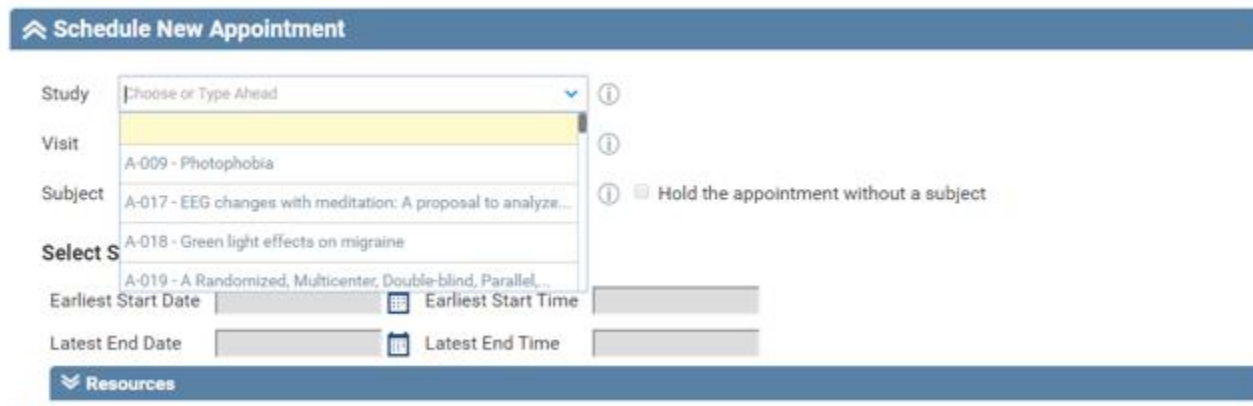
⌵ Resources

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Selecting Appointment Search Criteria

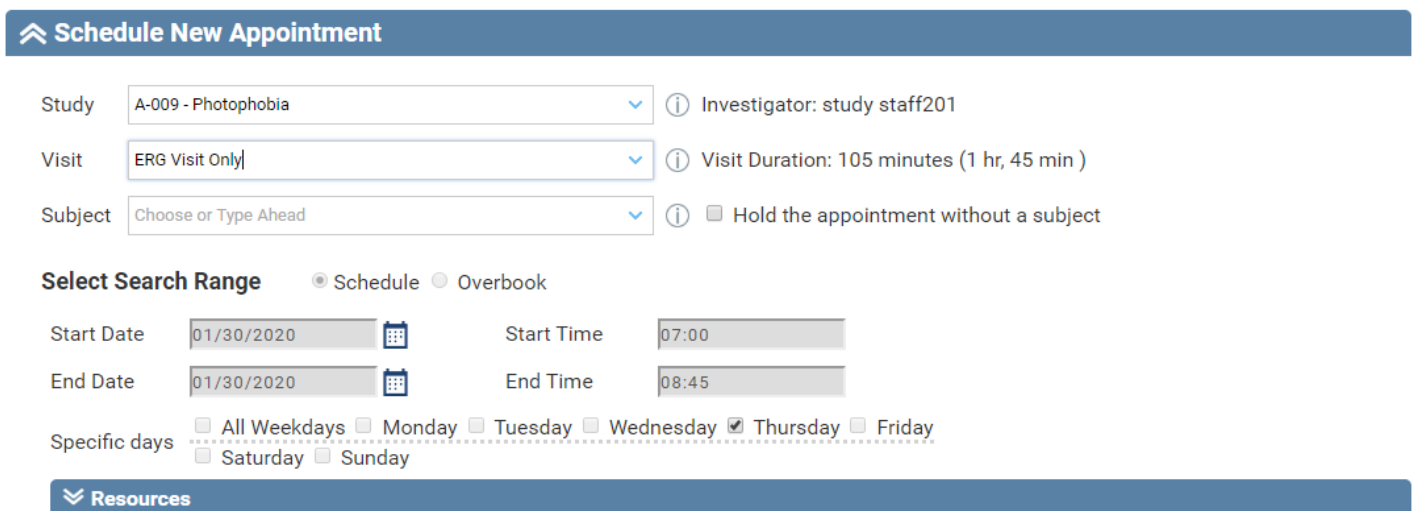
First, the *Select a Study* dropdown will be enabled. Select the study for which you would like to schedule a visit, or begin typing the Study Local ID or Study Name to filter the dropdown list. Once a study is selected, you can view the Study Investigator to the right of the dropdown.



The screenshot shows the 'Schedule New Appointment' form. The 'Study' dropdown is open, displaying a list of studies: 'A-009 - Photophobia', 'A-017 - EEG changes with meditation: A proposal to analyze...', 'A-018 - Green light effects on migraine', and 'A-019 - A Randomized, Multicenter, Double-blind, Parallel...'. To the right of the dropdown, there is an information icon and a checkbox labeled 'Hold the appointment without a subject'. Below the dropdown, there are fields for 'Earliest Start Date', 'Earliest Start Time', 'Latest End Date', and 'Latest End Time'. At the bottom, there is a 'Resources' section.

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



The screenshot shows the 'Schedule New Appointment' form. The 'Study' dropdown is set to 'A-009 - Photophobia', and the 'Visit' dropdown is set to 'ERG Visit Only'. To the right of the 'Visit' dropdown, there is an information icon and a text label 'Visit Duration: 105 minutes (1 hr, 45 min)'. Below the dropdowns, there is a 'Subject' dropdown set to 'Choose or Type Ahead' with an information icon and a checkbox labeled 'Hold the appointment without a subject'. Under the 'Select Search Range' section, there are radio buttons for 'Schedule' (selected) and 'Overbook'. Below this, there are fields for 'Start Date' (01/30/2020), 'Start Time' (07:00), 'End Date' (01/30/2020), and 'End Time' (08:45). At the bottom, there is a 'Specific days' section with checkboxes for 'All Weekdays', 'Monday', 'Tuesday', 'Wednesday', 'Thursday' (checked), 'Friday', 'Saturday', and 'Sunday'. At the bottom, there is a 'Resources' section.

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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.

Study: A-009 - Photophobia

Visit: Choose or Type Ahead

Subject: Choose or Type Ahead

Select S: SUBJECT21051, TEST - 909051 (M to F)

Earliest: SUBJECT21073, TEST - 909073 (U)

Latest E: SUBJECT21074, TEST - 909074 (D)

Res: SUBJECT21112, TEST - 909112 (M)

Hold the appointment without a subject

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.

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Schedule New Appointment

Study

A-009 - Photophobia

Investigator: study staff201

Visit

ERG Visit Only

Visit Duration: 105 minutes (1 hr, 45 min)

Subject

SUBJECT21051, TEST - 909051 (M to F)

Hold the appointment without a subject

Select Search Range

☒ Schedule
☐ Overbook

Start Date

01/30/2020

Start Time

07:00

End Date

Jan

2020

February 2020

March 2020

Specific days

Su

Mo

Tu

We

Th

Fr

Sa

Su

Mo

Tu

We

Th

Fr

Sa

Su

Mo

Tu

We

Th

Fr

Sa

Resources

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31

Search

Available

<24 Hours

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

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Select Search Range ☒ Schedule


Start Date  Start Time

End Date  End Time

 Please enter valid date range

Select Search Range ☒ Schedule

Start Date  Start Time

End Date  End Time

 Start Date/Time is after End Date/Time

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
☐ Saturday ☐ Sunday

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

Resources		
Display Records: <input type="text" value="50"/>	Page <input type="text" value="1"/> of 1	<input type="button" value="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

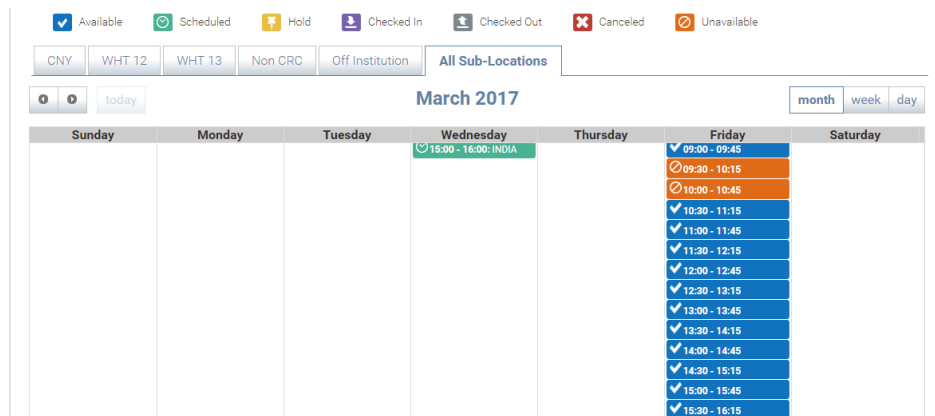
If you are ready to find available appointments, click on the *Search* button.

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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.



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 Summary

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 09:30

Visit End Time:

03/31/2017 10:15

Fixed

Float

Float Group

Flex

Display Unavailable Resources

Display Available Resources

Display Both

Resource Name	Start Time	End Time	Available	Reason for Unavailability
Dietitian, Research - WHT 13	03/31/2017 09:30	03/31/2017 10:00	✗	Default Availability - Quantity (3) Exhausted
DXA - WHT 13	03/31/2017 09:30	03/31/2017 10:15	✗	Default Availability - Quantity (1) Exhausted

Close

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

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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 Summary

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

Resource Name	Start Time	End Time
<div><div></div>Dietitian, Research - WHT 13</div>	03/31/2017 10:30	03/31/2017 11:00
<div><div></div>Dietitian, Research - WHT 13</div>	03/31/2017 10:30	03/31/2017 11:15
<div><div></div>DXA - WHT 13</div>	03/31/2017 10:30	03/31/2017 11:15

Comment:

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.

SCHEDULER

HOME

RESOURCES

STUDIES

SUBJECTS

MANAGEMENT

STANDARD REPORTS

Appointments

Resource Timeline

View by:

Calendar

List

Select Date:

10/04/2017

Filter By:

choose

Reset

Schedule New Appointment

Available

Scheduled

Hold

Checked In

Checked Out

Canceled

Unavailable

ACC

CTC

CTH

Meal Pick Up

NICU

Tower 9

Non CRC

Off Institution

All Sub-Locations

October 2017

month

week

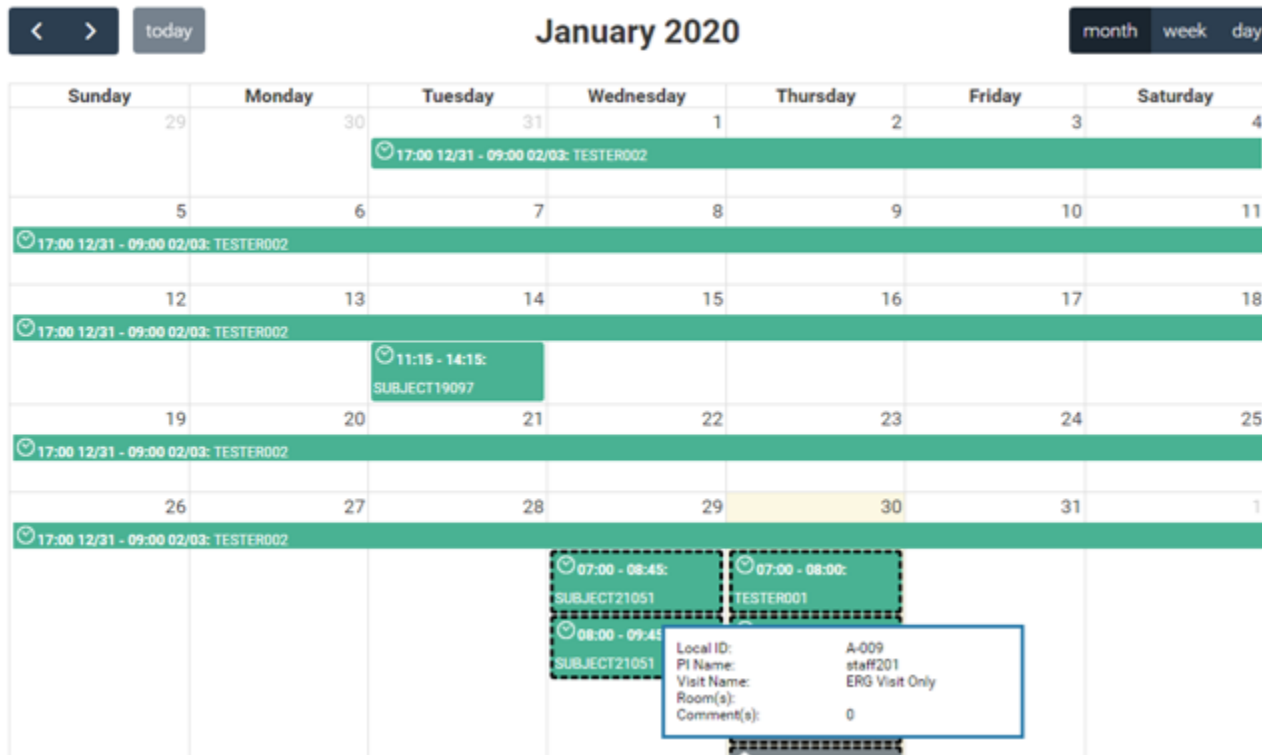
day

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<div><div>07:00 - 07:30</div><div>TESTER103</div></div>			<div><div>TESTER005</div><div>TESTER005</div><div>TESTER101</div><div>TESTER101</div><div>TESTER102</div></div>			

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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.



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.

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