

**HARVARD  
CATALYST**

THE HARVARD CLINICAL  
AND TRANSLATIONAL  
SCIENCE CENTER

## Quick Start Guide: Study Subjects

In this guide you will learn how to enter a study subject into the HCCRC Scheduling System as well as how to search for and edit a subject's information. You will also learn how to assign study subjects to your studies.

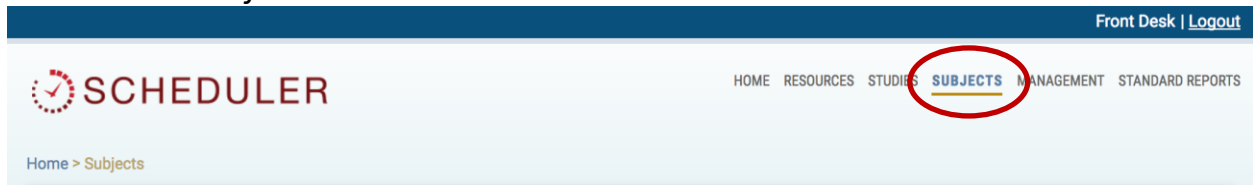
Questions? Please reach out to the HCCRC Scheduler Support Team  
help desk - [harvardcatalyst.zendesk.com](https://harvardcatalyst.zendesk.com)  
email - [support@harvardcatalyst.zendesk.com](mailto:support@harvardcatalyst.zendesk.com)

Updated 11/20/2019

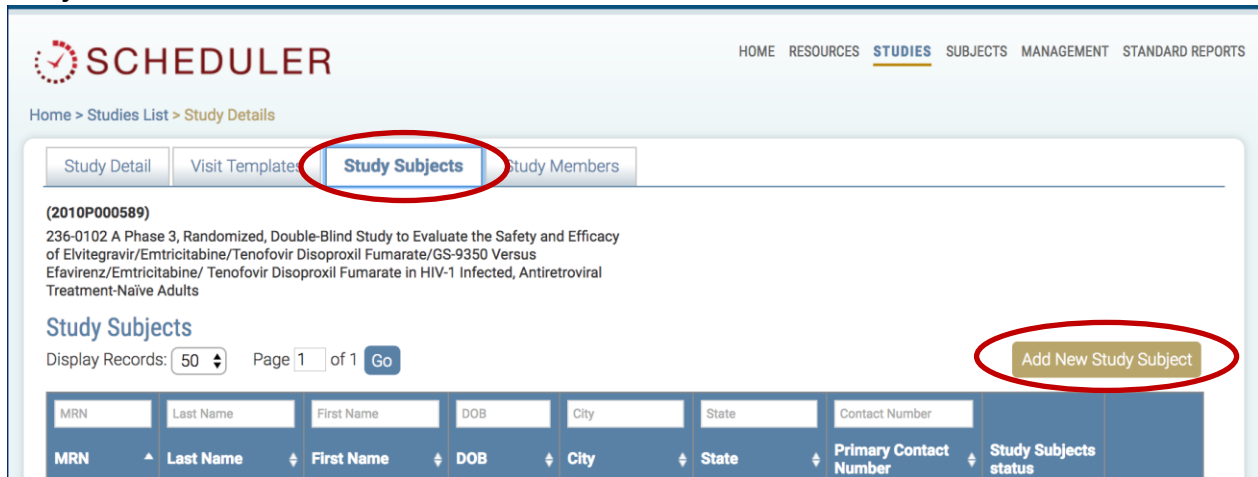
## Create and Search for Subjects

There are 2 areas in the Scheduler Application that will allow you to either create a new subject record or search for a subject already in the database.

1. Click on the *Subjects* module

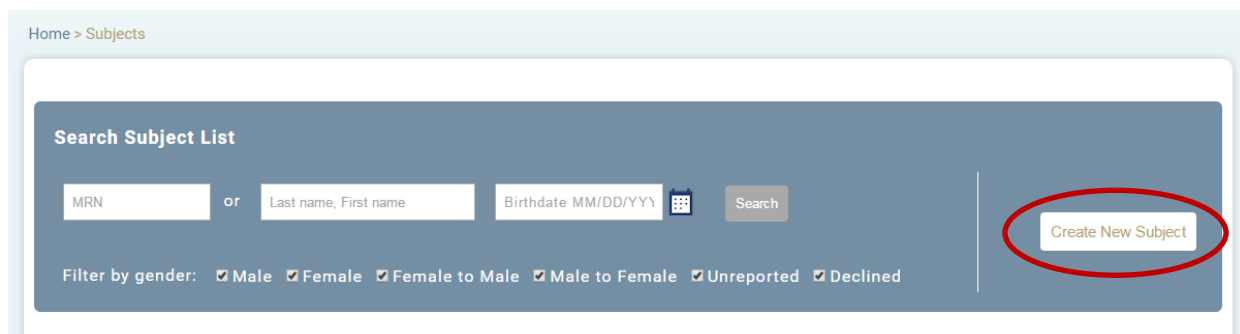


2. Click on the *Studies* module, then go to Study Details > Study Subjects > Add New Study Subject



## Creating a New Subject Record

Once you navigate to the *Subjects* module, click on the *Create New Subject* button.



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After clicking the button, a subject form will appear for you to enter subject data. Fields with asterisks are required.

Home > Subjects > Create New Subject

**Create New Subject** \* = Required

First Name \*  Street Address 1 \*  Add to Study

Middle Name/Initial  Street Address 2  Comment

Last Name \*  City \*

Gender \*  State

Race \*  Zipcode \*

Ethnicity \*  Country \*

Birth Date \*   Primary Phone \*

MRN \*  Secondary Phone

Click on the Study drop-down list to select the study you wish to add the subject to and then click on the *Save* button. You have now created a new subject record and added that subject to the selected study.

Add to Study

## Search for an Existing Subject Record

In some cases, your subject may already have an existing record in the Scheduler database. To search for an existing record, either search by MRN or search by a combination of full name and birthdate in the *Search Subject* form of the *Subjects* module and click *Search*.

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Home > Subjects

### Search Subject List

or

Filter by gender: 
  Male 
  Female 
  Female to Male 
  Male to Female 
  Unreported 
  Declined

If the subject you searched has an existing record in the Scheduler database, the following results screen will display. This screen has a *More Actions* link to allow you to either add the subject to your study, edit or modify subject information.

-	<b>INDIA, FRED</b>	DOB: 01/29/1961	Gender: Declined	<b>BOSTON, MASSACHUSETTS</b>		
	Street Address 1	123 Main St	Primary Phone	(555) 111-1111		MRN: 888752 nss
	Street Address 2		Secondary Phone	(555) 111-1111		<a href="#">More Actions</a>
	City	BOSTON	Race	American Indian/ Alaskan Native		
	State	Massachusetts	Ethnicity	DECLINED		
	Zipcode	01234				
	Country	UNITED STATES				

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