University of Nebraska Medical Center

Center for Clinical and Translational Research Standard Operating Procedure

Nebraska Medicine

Section: **Clinical Research Center**

Title: **Scheduling Visits**

SOP Number: **CO33**

Date Created: **November 1st, 2010**

Version Date: **January 1, 2023**

PURPOSE: The purpose of this standard operating procedure (SOP) is to promote efficiency, communication and workload tracking within the department by maintaining a correct and up-to-date schedule of subject study visits.

SCOPE: This SOP applies to all study personnel involved in the scheduling of study appointments within the Clinical Research Center (CRC) clinical area or committing time for a clinical trial study visit in other areas of the medical center.

PERSONNEL RESPONSIBLE: Study Coordinators and/or CRC staff assisting with scheduling subjects.

PROCEDURES:

To ensure coordinator, research assistant, equipment and room availability all subject visits, including phone visits, are scheduled in One Chart CRC clinic scheduler.

- Outpatient studies – All visits, including telephone visits, are scheduled according to the protocol timeline and assigned the appropriate time estimated by events of the visit.
- Inpatient studies – Time spent by coordinators and research assistants on inpatient visits are accounted for on the CRC One Chart clinic scheduler. The coordinator enters the visit on the provider calendar only, since no CRC space is used for this type of visit.
- Study assessment procedures scheduled with ancillary departments (e.g., x-rays, laboratory test, DEXA, MRI's) are added to the appointment notes.
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To schedule appointments with the CRC the following procedures should be followed:

- Create a new appointment within Microsoft Office Calendar for the desired date*.
- Select "Invite Attendees" and add CRCclinic@unmc.edu along with any other invitees.
- Enter the name of the study, the IRB #, and the visit description in "Title".
- Enter the correct start and end times for the appointment.
- Select CRC for "Location".
- In the body of the email, please type the name of the subject and their MRN. Then include the services that will be utilized in the CRC.
    - Example: Minnie Mouse, MRN 12345, will be coming in for the Disney Study Visit 1 on 14-FEB-2022 at 8am. We will need an exam room for her physical exam, a clinic ECG, and phlebotomy with processing and shipping please.
- Send the invitation.

- The CRC Clinic administrators will accept the invitation if the appointment time works, or they will send a follow-up email if more details are needed or if the appointment will need to be rescheduled.
- The CRC Clinic administrators will then enter the subject's appointment information in EPIC into the NMC Clinical Research Department's schedule.
- Non-CRC staff should not make changes to or cancel the appointment in Epic. Contact the clinic via email or phone if changes, rescheduling, or cancellation is needed.
- Study visits should be scheduled as soon as possible to ensure availability of supplies, staff, and clinical space. For appointments requested inside of a week it is required you call the clinic at 402-559-7685 to ensure availability.

Department Approval

Signed Charles E Miller
Clinical Research Center Administrator
Signed: 2/10/2023

Signed
Assistant Vice Chancellor for Clinical Research
Signed: 2/7/2023