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Access

Once access has been granted, users access the Portal using https://ctsi.ahc.umn.edu/portal/. To reach the Scheduling System use the link in the Toolkit.

Scheduling System
Manage Studies
Clicking on the Manage Studies icon from Scheduling System main page will direct the user to the studies he/she is associated with.

My Studies
This section lists all the studies the user has access to. The user can search for a specific study by using the search function. Search is limited to the following information.

- CTSI Number – a unique number to identify a project in the CTR Portal.
- Short Title – a short description of the project.
- Subject – the number of subjects enrolled in the project.

Once a study is found, click on the CTSI # or Short Title of the study to access the study’s details.

My Studies

<table>
<thead>
<tr>
<th>CTSI Number</th>
<th>Short Title</th>
<th>Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>20392</td>
<td>Sitagliptin to Improve Outcomes After Islet Autotransplant</td>
<td>0</td>
</tr>
<tr>
<td>20391</td>
<td>Test Project</td>
<td>0</td>
</tr>
<tr>
<td>20669</td>
<td>Big Bird’s Test Project</td>
<td>0</td>
</tr>
</tbody>
</table>

Showing 1 to 3 of 3 entries (filtered from 203 total entries)

← Previous  1  Next →
**Study Details**
The Study tab will show minimal information about the study.

**CTSI ID 20331: Test Project**

<table>
<thead>
<tr>
<th>Study</th>
<th>Staff</th>
<th>Subjects</th>
<th>Scheduled</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**CTSI ID**
20331

**Full Title**
Test Project

**Short Title**
Test Project

**TASCS Number**
### Study Staff

**CTSI ID 20331: Test Project**

<table>
<thead>
<tr>
<th>Study</th>
<th>Staff</th>
<th>Subjects</th>
<th>Scheduled</th>
</tr>
</thead>
</table>

#### List of staff

- **Show All** – click this button to display all.
- **Show Active** – click this button to display only the active person.
- **Show X entries** – choose the number of people per page to display.
- **Search** – type in the search field to filter the list.
- **Scheduling Access** – indicate access to the scheduling system.

<table>
<thead>
<tr>
<th>Name</th>
<th>X.500</th>
<th>Roles</th>
<th>Phone</th>
<th>Email</th>
<th>Status</th>
<th>Scheduling Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Johnson, Aaron</td>
<td></td>
<td>Co-Investigator</td>
<td></td>
<td></td>
<td>Active</td>
<td>Access</td>
</tr>
<tr>
<td>Melcher, Emily</td>
<td></td>
<td>Principal Investigator</td>
<td></td>
<td></td>
<td>Active</td>
<td>Access</td>
</tr>
</tbody>
</table>

Showing 1 to 2 of 2 entries
Study Subjects

CTSI ID 20331: Test Project

List of subjects

- Add Subject – click this button to open the Add Subject form.

Scheduled Visits

CTSI ID 20331: Test Project

List of scheduled visits

- Add Subject – click this button to open the Add Subject form.
• Show Upcoming – display all events scheduled now and in the future.
• Scheduled – toggle ON (blue) to show events with the status of Scheduled.
• Complete – toggle ON (blue) to show events with the status of Complete.
• Cancelled – toggle ON (blue) to show events with the status of Cancelled.
• No Show – toggle ON (blue) to show events with the status of No Show.

Adding Subjects
To add subjects to the study, navigate to the Subjects tab of the Study Details and click on the Add Subject button.

**Add New Subject**

**Basic Information**

- **Subject ID**
- **First Name**
- **Middle Name**
- **Last Name**
- **Birthdate**

**Ethnicity**
- Hispanic or Latino
- Not Hispanic or Latino

**Race**
- American Indian or Alaska Native
- Asian
- Black or African American
- Native Hawaiian or Pacific Islander
- White
- Other Race
- Does not wish to disclose

**Gender**
- Female
- Male

**Contact Information**

**Preferred Method of Contact**

**Miscellaneous**

- **Marital Status**
- **Previous Last Name**
- **Fairview Medical Number**
- **Emergency Contact Name**
- **Emergency Contact Phone Number**
- **Emergency Contact Relationship**

**Save Subject**
• Active/Inactive – status of subject record.
• Save Subject – save the changes to the subject record.
• Subject ID – if used, must be unique to the study.
• First Name/Last Name – subject name is required.
• To cancel – close the form and discard any changes.

Schedule Events
Clicking on the Schedule Events icon from Scheduling System main page will direct the user to his/her default calendar. The default view is set by the user’s view preference on today’s date.

Calendar

<table>
<thead>
<tr>
<th>DCRU</th>
<th>MCNU</th>
<th>LCRU</th>
<th>ECRC</th>
<th>CNBD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Back</td>
<td>01/01/2015</td>
<td>Forward</td>
<td>Today</td>
<td>Thursday, Jan 1, 2015</td>
</tr>
</tbody>
</table>

Select resources to view Create New Event
**Navigation**

- Back – go back one day, one week, one month, or one year.
- Date – select a specific date using a pop-up mini calendar.
- Forward – go forward one day, one week, one month, or one year.
- Today – go to today’s date.

**View Preference**

Clicking on the “Select resources to view” button will open the view preference window. Use the view preference to add/remove specific room or resources to the calendar.

- Save Locations – click this button to save the view preference.
- Update View - click this button to close the preference window and refresh the calendar.
Create an event
Click & drag on the calendar to quickly add a new event. Use the quick-add form to quickly reserve an event.

Quick-Add Form

Exam E: Thu, May 9, 10:00am – 11:00am (1 hour)

Details

Visit Type
Choose visit type

Project
Choose project

Notes

- x – click this to close and cancel the quick-add form.
- Visit Type – choose from Visit, Unscheduled Visit, or “Space Only” to describe the event type.
- Project – choose the project associated to the event.
- Save Reservation – click this button to save the event without subjects nor services.
- Edit Reservation – click this button to open the advanced form.
Advanced Form

Make reservation

• Save reservation – click this button to save the event details and reserve the selected resource(s).
• Cancel – click this button to close the Advanced Form and discard any changes.
• Subjects and services – click this tab to assign subjects and their associated services.

Details
• Notes – add additional information like coordinator name & contact #.
• Visit Type – choose from Visit, Unscheduled Visit, or “Space Only” to describe the event type.
• Project – choose the project associated to the event.

Resources
• # of resources per visit – choose the number of resources needed for the event.
• Repeat Pattern – choose from “One time only”, “Study Specific”, Daily, “Every weekday (Mon-Fri)”, “Every Mon., Wed., and Fri.”, “Every Tues. and Thurs” or Weekly.
• Date – choose the specific date of the event.
• Facility – choose from DCRU, MCRU, etc. depending on user’s access.
• Start Time – choose the start time of the event.
• Duration – choose the length of the event. User must enter Hour and Minute.
• Resource Type – choose the type of resource (ie. room) needed for the event.
• Resource – depending on availability, choose the appropriate resource for the event.
• Search Availability – click the button to search for availability based on the information above.

User Tip:
• Some visits require multiple resources to be defined depending on the services provided (i.e. a DEXA resource must be paired with a DEXA/PQCT Tech resource). Contact the facility where the visit will take place for verification.

Subjects and Services
Make reservation

Assigned Subjects

<table>
<thead>
<tr>
<th>Name</th>
<th>Visit Services</th>
<th>Dietary Needs</th>
<th>Parking Passes</th>
</tr>
</thead>
</table>

• Add Subject – click the button to select a subject for the event.

Attachments
Attachments can be uploaded after the event has been created.

Attachments

• + Add files - click this button to browse for a file to upload.
• Start – click this button to start uploading the file.
• Cancel – click this button to cancel the upload of file.

20130508 Sched Syst - FileAttach.png

Date the document was uploaded:
05/08/2013
• Click on the file link to open the file.
• Delete – click this button to delete the file.

**Reporting Tools**

**Reports**

- **Legacy Facility Agenda** - Ideal for Excel/PDF exports
- **New Facility Agenda** - Improved interface and added functionality. Exports are a work in progress.

- **Legacy Facility Agenda** – a report of events for a specific facility and date range. Additional filters are available to fine tune the report.

**Usage includes but not limited to:**
- A report of events for the current date including the resource reserved.
- A report of events for the current date for a particular study.
- A report of events in a month for a particular study.
• **New Facility Agenda** – an improved Facility Agenda report that shows events for a specific facility and date range. Additional filters are available to fine tune the report.

![Facility Agenda interface](image)

• **Usage includes but not limited to:**
  - A report of events with subjects
  - A report of Space Only events
  - A report of Non-clinical events
  - A report of events with standard of care