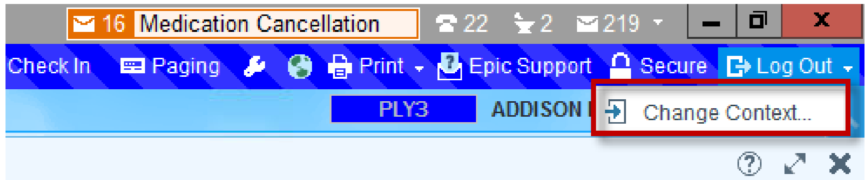
Clinical Research Snapboard Scheduling

Department

You will need to log in to the **Clinical Research Clinic** department.

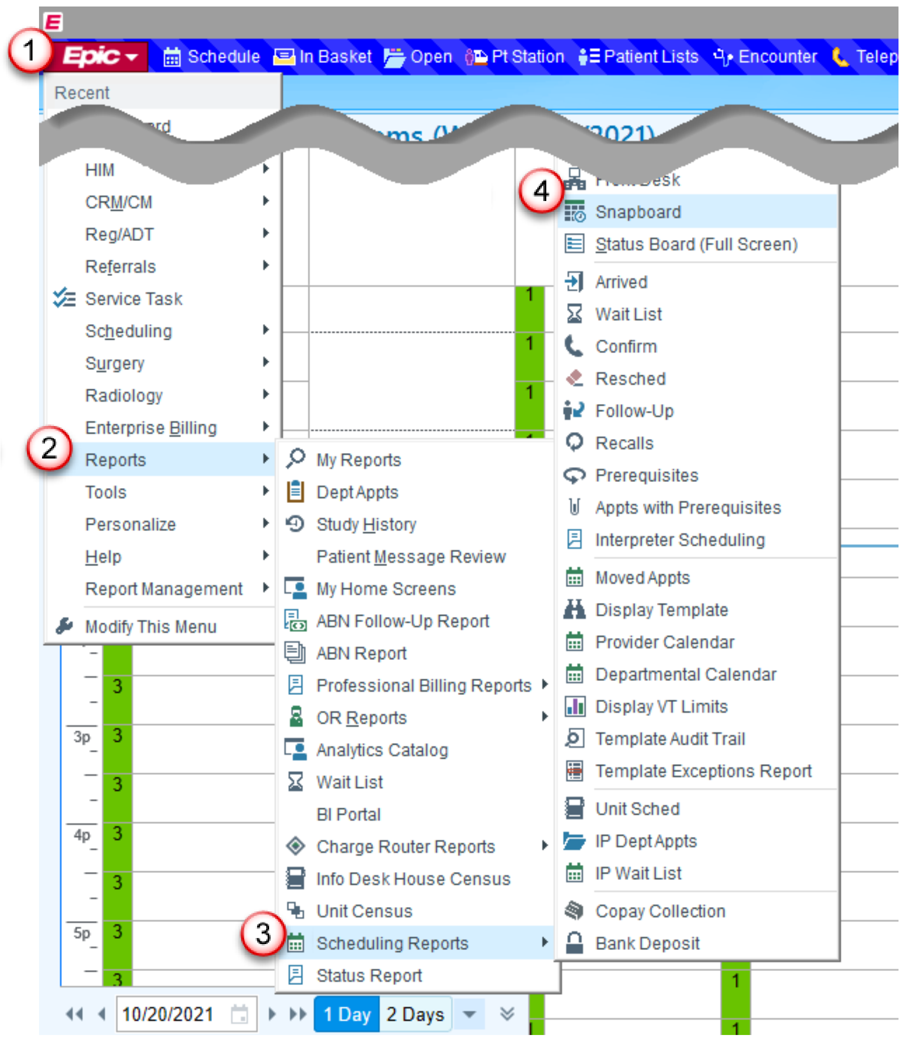
Use **Change Context** if you are already logged in to a different department.



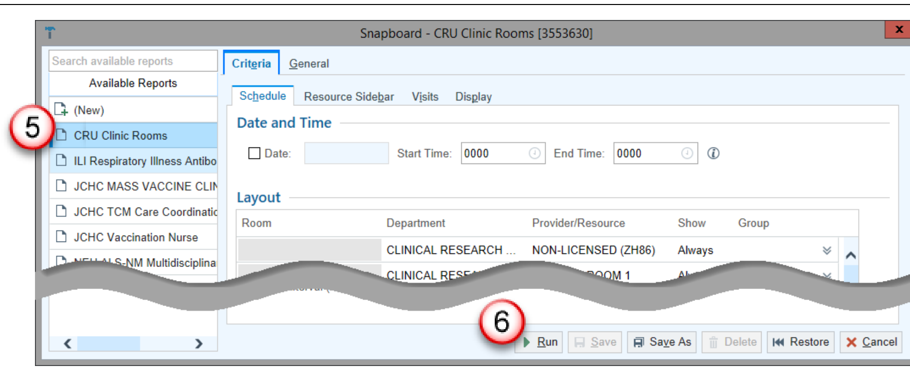
Snapboard Set Up

1. Click the **Epic** button.
2. Navigate to **Reports**.
3. Select **Scheduling Reports**.
4. Select **Snapboard.**

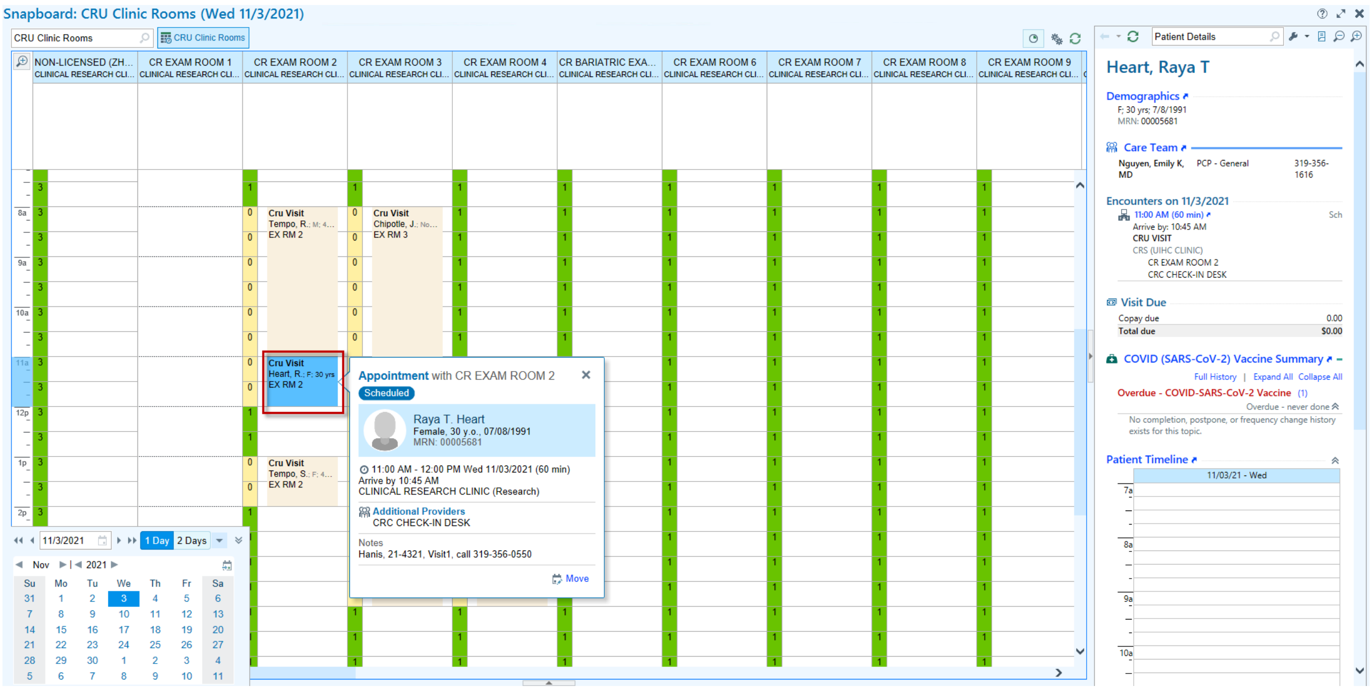
Or search for **Snapboard** in the search bar.



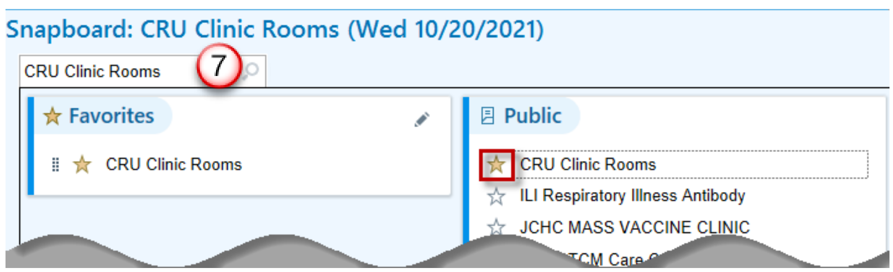
5. Select the **CRU Clinic Rooms** report.
6. Click **Run**.



The **Snapboard** displays, showing appointments currently scheduled in the Clinical Research Clinic. **Select** an appointment to see details about the patient and the appointment.

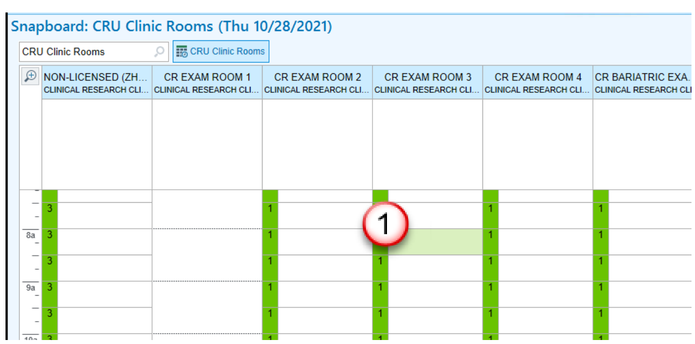


7. Click the Search icon and use the Star to mark this Snapboard as a **favorite**.



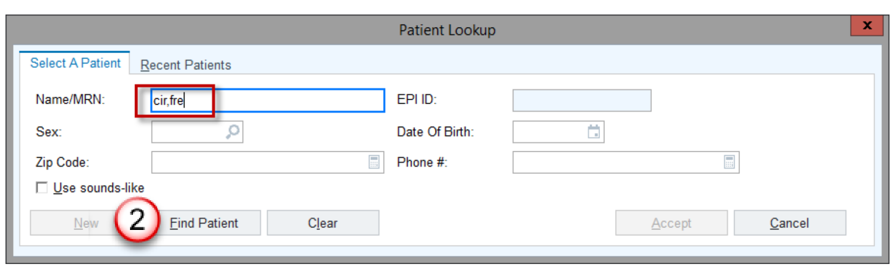
Initiating Scheduling

1. Double-click on the appropriate **time**.



2. Search for the relevant patient.

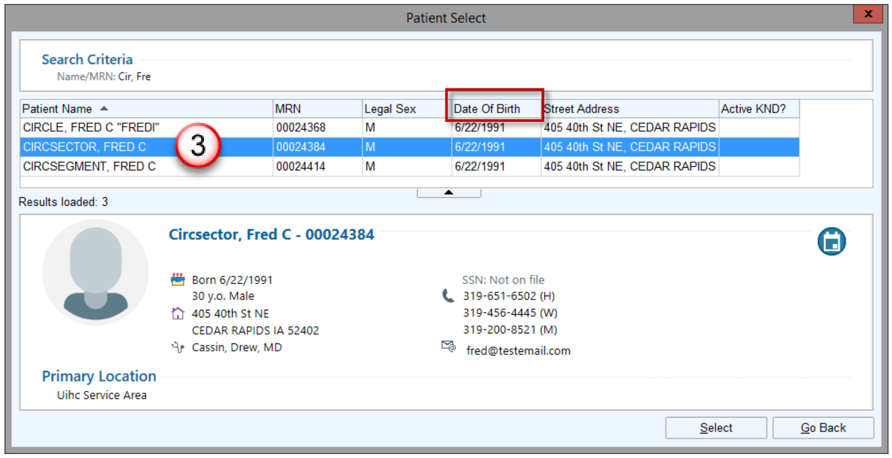
MRN, Name, Date of Birth, etc. can be used.



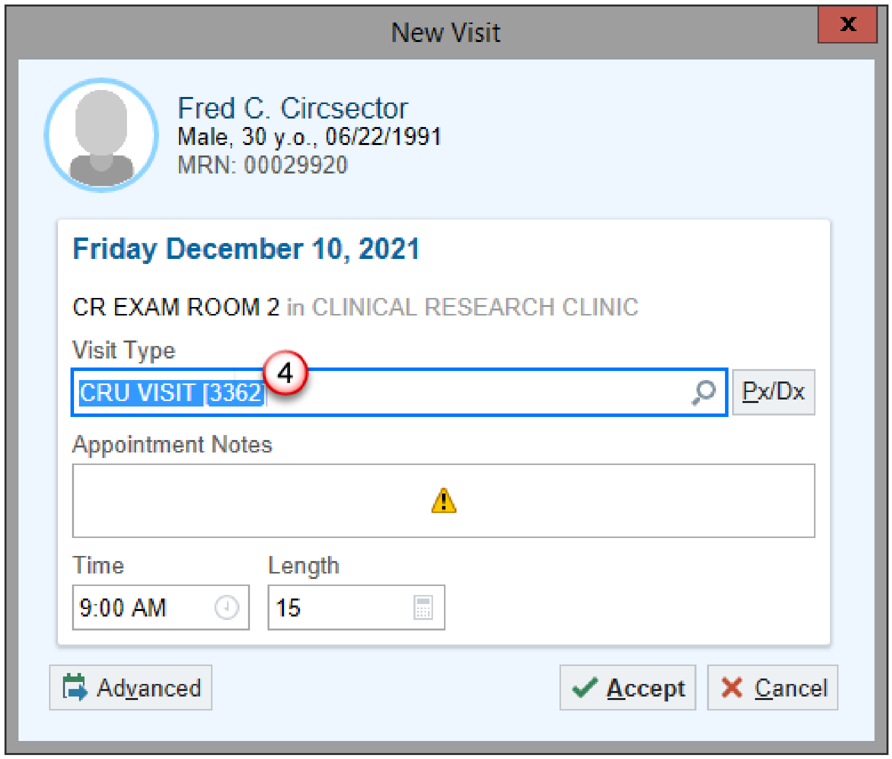
3. Select the patient.

Use dual identifiers to make sure the correct patient is selected.

If the patient is a new patient, create the patient record. Refer to [Creating New Patient Medical Record Numbers (MRNs)] tip sheet if needed.



4. Search for the **Visit Type** (CRU Visit [3362])

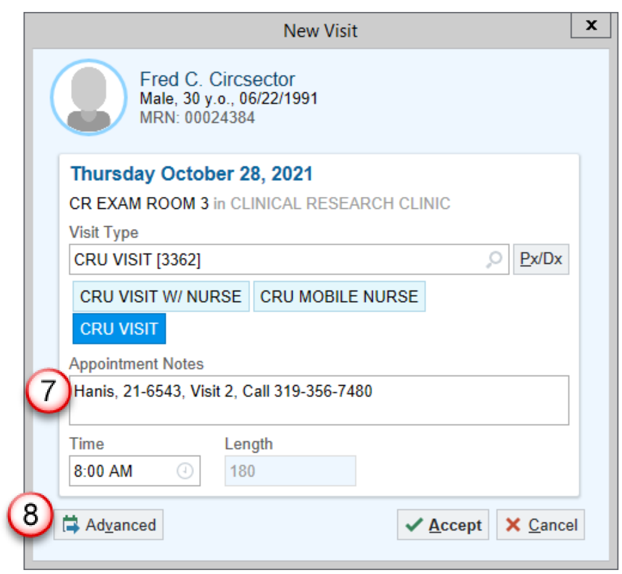


5. Type in the **Appointment Notes**.

Appointment notes should include: PI last name, CRU study number, which visit (eg, Visit 2), who to contact/page/Voalte with questions (eg, Call 319-356-7480).

In addition, when scheduling a visit for which a nurse will be needed, the appointment notes should indicate if an RN, MA, or NA is needed and what tasks they will be performing: eg, "Hanis, 21-6543, Visit 6, call 319-356-7480, RN needed for labs, vitals, height/weight, and infusion"

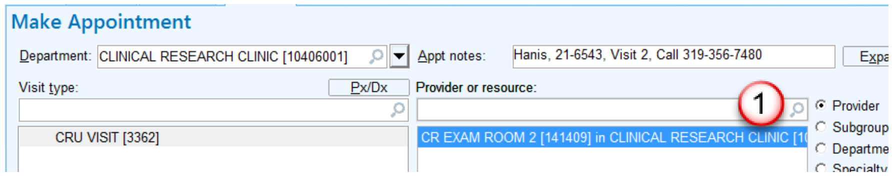
6. Click **Advanced**.



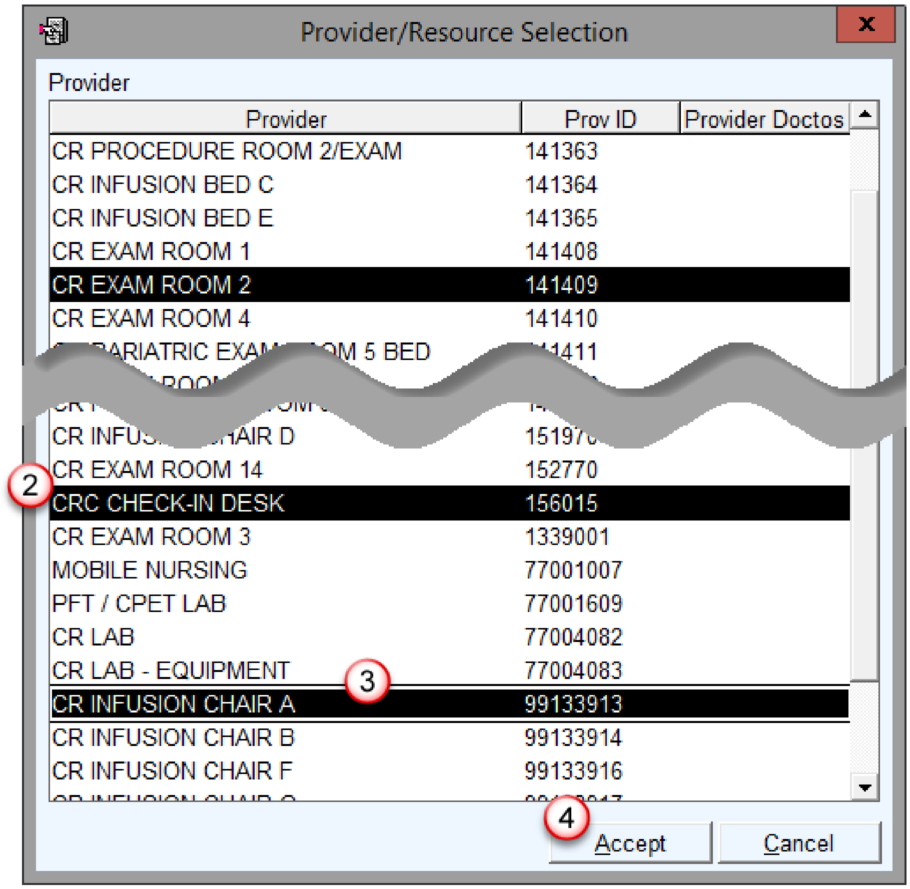
Appt Entry

Appt Entry displays, reflecting all previously selected choices.

1. Click the Provider/Resource magnifying glass.



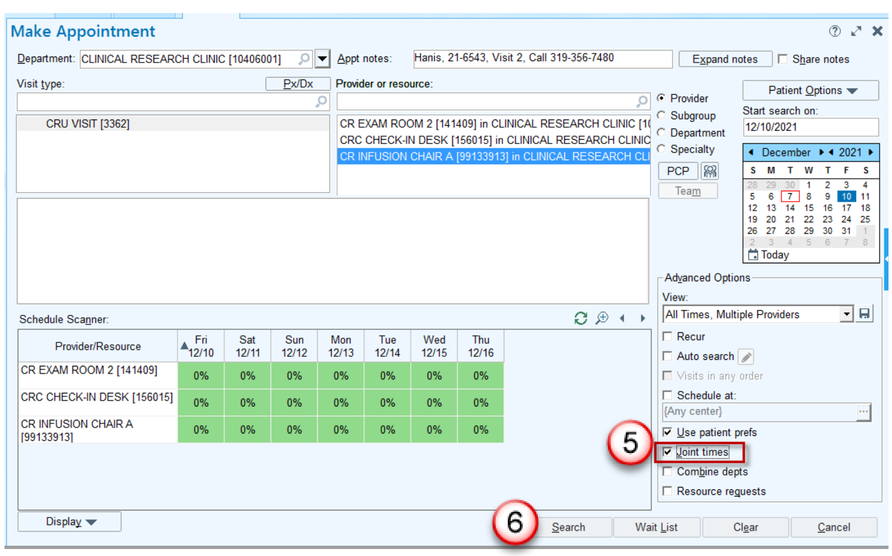
2. Select **CRC Check-In Desk**.
3. Select any additional resources needed (eg, Infusion Chair, Consult Room, etc.)
4. Click **Accept**.



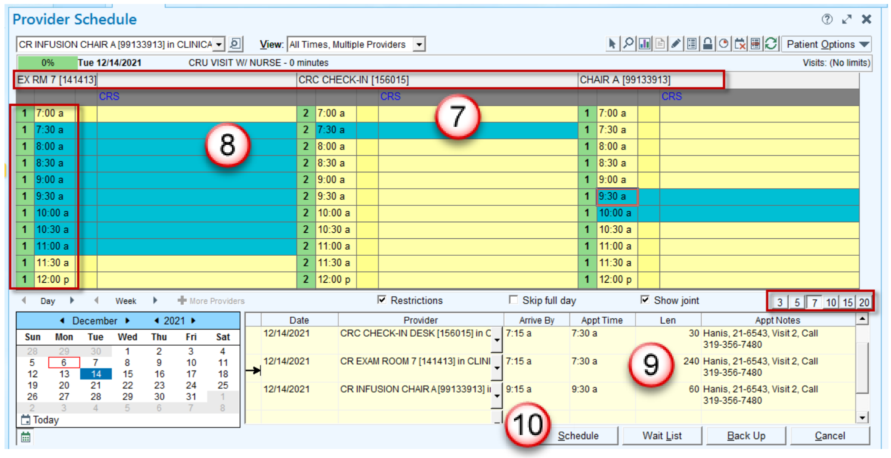
5. Checkmark **Joint Times**.

If this step is not completed, the appointment will not be scheduled appropriately!

6. Click **Search**.



The schedules of all resources needed display.



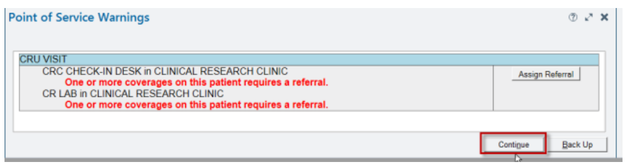
- Names display at the top of the column, and times down the left side of the column.
- Toggle the number of resources displaying if not all are visible.
- Times that are not available for one or more of the resources will display in gray.

7. Double-click the check-in time for the Check-In desk first.
8. Double-click the appropriate start time for each resource.

- Times must be adjacent or concurrent (touching), otherwise Epic will schedule separate appointments.

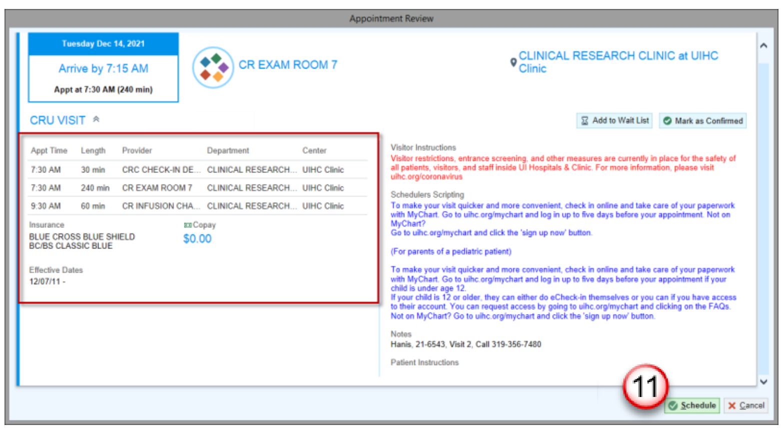
9. Edit the Len field in the editable form to the appropriate length. Press **Tab** to complete.
10. Click **Schedule**.

For patients with certain insurance plans, you may see a warning regarding the need for a referral. Because patients (and their insurance) don't pay for Research study visits, click **Continue**.



11. Review the Appointment information, and click **Schedule**.

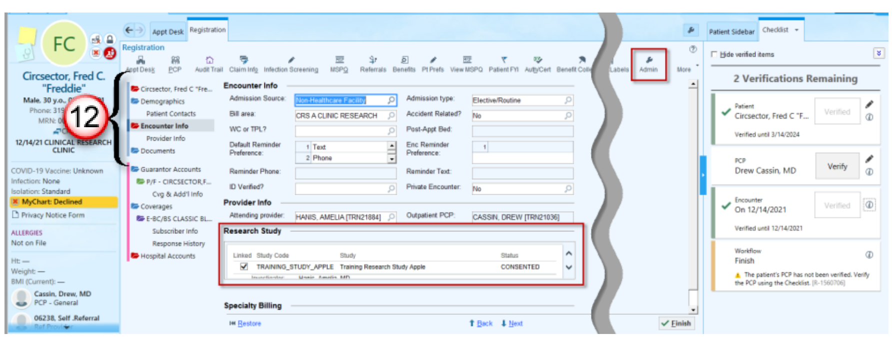
- There should only be one visit, and each resource should have the appropriate start time and length of visit. Cancel and return to steps 7-9 if anything is incorrect.



12. Continue through [Patient and Appointment-Level Registration](), including [Linking the Encounter to the Research Study]() and ensuring the visit has been marked as [Sensitive]().

    The Attending Provider should be the principal MD on the study.

    If needed, [enroll the patient]() with the study before or during Registration.



Questions? If you need Epic assistance, please contact the Health Care Information Systems Help Desk at (319) 356-0001.