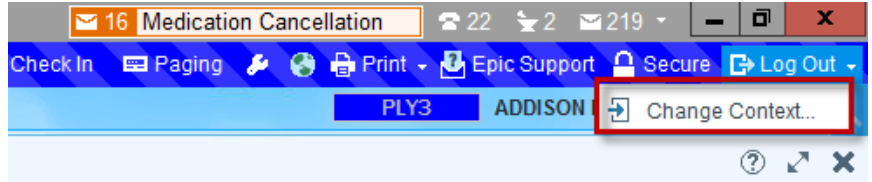


Clinical Research Snapboard Scheduling

Department

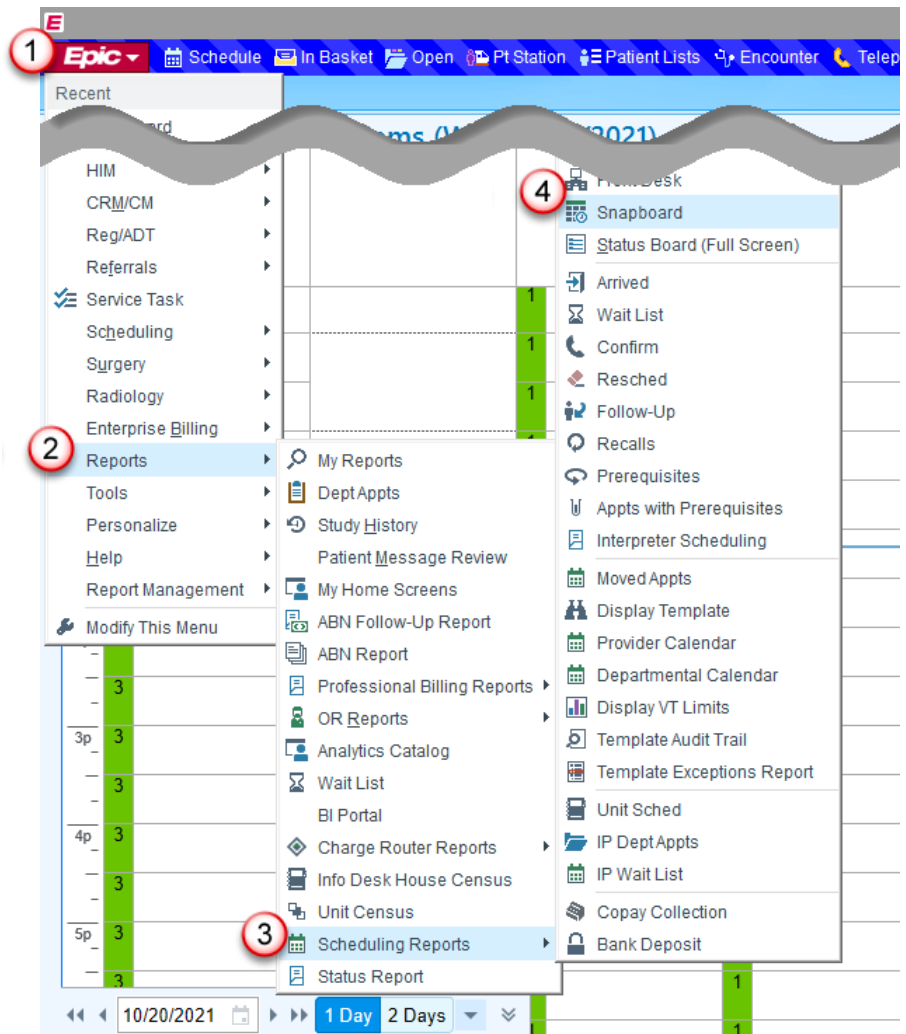
You will need to log in to the **Clinical Research Clinic** department.

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

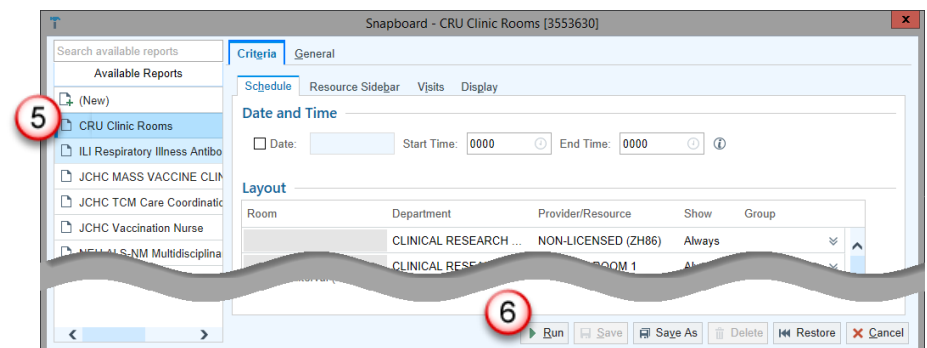


Snapboard Set Up

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

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

Initiating Scheduling

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

- Search for the relevant patient.
i MRN, Name, Date of Birth, etc. can be used.

3. Select the patient.

i 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.

Patient Name ^	MRN	Legal Sex	Date Of Birth	Street Address	Active KIND?
CIRCLE, FRED C "FREDI"	00024368	M	6/22/1991	405 40th St NE, CEDAR RAPIDS	
CIRCSECTOR, FRED C	00024384	M	6/22/1991	405 40th St NE, CEDAR RAPIDS	
CIRCSEGMENT, FRED C	00024414	M	6/22/1991	405 40th St NE, CEDAR RAPIDS	

Results loaded: 3

Circsector, Fred C - 00024384

Born 6/22/1991
30 y.o. Male
405 40th St NE
CEDAR RAPIDS IA 52402
Cassin, Drew, MD

SSN: Not on file
319-651-6502 (H)
319-456-4445 (W)
319-200-8521 (M)
fred@testemail.com

Primary Location
Uihc Service Area

Select Go Back

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

Fred C. Circsector
Male, 30 y.o., 06/22/1991
MRN: 00029920

Friday December 10, 2021
CR EXAM ROOM 2 in CLINICAL RESEARCH CLINIC

Visit Type
CRU VISIT [3362] PxDx

Appointment Notes

Time: 9:00 AM Length: 15

Advanced Accept Cancel

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

i 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**.

Fred C. Circsector
Male, 30 y.o., 06/22/1991
MRN: 00024384

Thursday October 28, 2021
CR EXAM ROOM 3 in CLINICAL RESEARCH CLINIC

Visit Type
CRU VISIT [3362] PxDx
CRU VISIT W/ NURSE CRU MOBILE NURSE
CRU VISIT

Appointment Notes
Hanis, 21-6543, Visit 2, Call 319-356-7480

Time: 8:00 AM Length: 180

Advanced Accept Cancel

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**.

Provider	Prov ID	Provider Doctos
CR PROCEDURE ROOM 2/EXAM	141363	
CR INFUSION BED C	141364	
CR INFUSION BED E	141365	
CR EXAM ROOM 1	141408	
CR EXAM ROOM 2	141409	
CR EXAM ROOM 4	141410	
GERIATRIC EXAM ROOM 5 BED	141411	
CR INFUSION CHAIR D	151970	
CR EXAM ROOM 14	152770	
CRC CHECK-IN DESK	156015	
CR EXAM ROOM 3	1339001	
MOBILE NURSING	77001007	
PFT / CPET LAB	77001609	
CR LAB	77004082	
CR LAB - EQUIPMENT	77004083	
CR INFUSION CHAIR A	99133913	
CR INFUSION CHAIR B	99133914	
CR INFUSION CHAIR F	99133916	

5. Checkmark **Joint Times**.

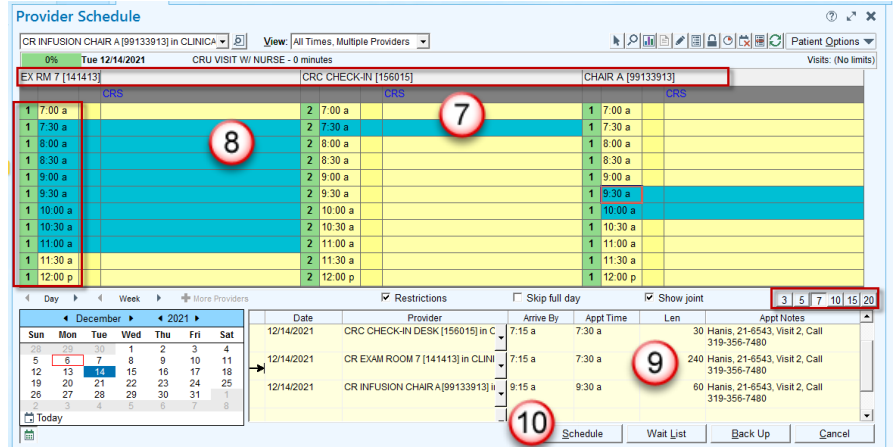
If this step is not completed, the appointment will not be scheduled appropriately!

6. Click **Search**.

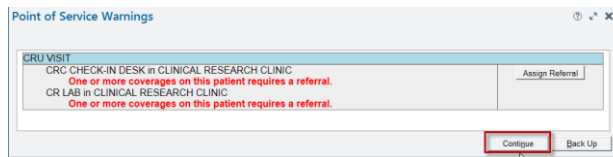
Provider/Resource	Fri 12/10	Sat 12/11	Sun 12/12	Mon 12/13	Tue 12/14	Wed 12/15	Thu 12/16
CR EXAM ROOM 2 [141409]	0%	0%	0%	0%	0%	0%	0%
CRC CHECK-IN DESK [156015]	0%	0%	0%	0%	0%	0%	0%
CR INFUSION CHAIR A [99133913]	0%	0%	0%	0%	0%	0%	0%

The schedules of all resources needed display.

- i** Names display at the top of the column, and times down the left side of the column.
 - i** Toggle the number of resources displaying if not all are visible.
 - i** 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**.

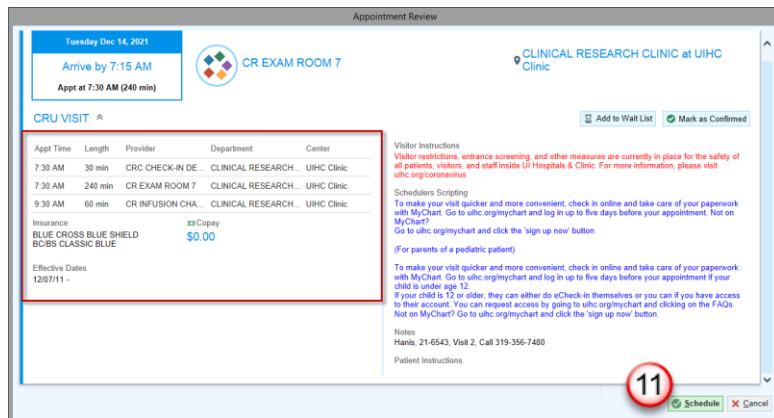


For patients with certain insurance plans, you may see a warning regarding the need for a referral. Because patients (and their insurance) don't pay for Research study visits, click **Continue**.



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

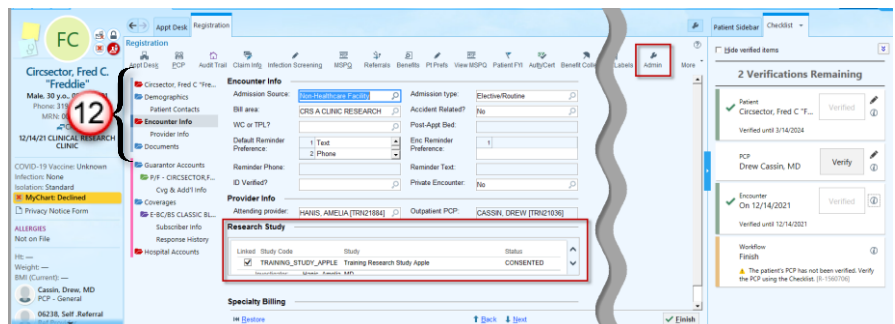
- i** There should only be one visit, and each resource should have the appropriate start time and length of visit. Cancel and return to steps 7-9 if anything is incorrect.



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.