CALPENDO SCHEDULING CHEAT SHEET

1. Sign into Calpendo ([https://crucal.icts.uiowa.edu](https://crucal.icts.uiowa.edu/Calpendo/))Google Chrome or Mozilla Firefox are the preferred browsers.
2. **Click in the “Calendar”** in the header.
3. From the dropdown choose what **type** of room you would like to book into - this will open the schedule for that type of room.

* No Room Needed –Subject does not need to be spend time in a room with staff during their CRU visit.

For example, VS or ECG or blood draw **only.**

* Exam Rooms – Exam table, small desk, workstation computer.
* Consult Rooms - Table, chairs, workstation computer.
* Infusion Rooms – the ‘infusion bay’.

For IV infusions or for PK draws over an extended period or any situation that requires a subject to stay in CRU for an extended period. 2 beds available, 5 recliner chairs available.

* Procedure rooms – larger rooms with either ‘Stryker/Stretcher’ or bed (procedure 2).

Counter space or desk. Workstation computer.

* Specialty rooms – reserved for CV Physiology and Vascular groups.

You need special permission to reserve these rooms.

* Inpatient beds – 14 days advance notice is required to reserve an inpatient bed.
* Lab Processing ONLY – choose this when you need lab resources only, meaning the subject will not be present on the CRU – the labs will be brought to the CRU lab by study personnel.

1. **ON THE CALENDAR, Choose the Date** into which you wish to book
2. Choose a room and the time you want to book
3. When you click on the time the booking field will open up
4. PLEASE DO NOT DO ANYTHING IN THE **“TYPE”** BOX.
5. **Choose a Project**-click on the down arrow and choose the IRB number along with the PI’s name and CRU number.
6. **“From”** box - you will choose the time you want to start the booking. (you have already chosen the date)
7. **“To”** box - you will choose the time you want the booking to end.
8. **“Reminder”** box - if you want calpendo to send you an email reminder, pick the notice period and then pick the recipients. If you don’t want a reminder, click on the check mark to remove it and calependo will not send a reminder to you.
9. **Repeat** box - If you do not want this visit to repeat, leave this box at NO REPEAT.

If you want to repeat this visit (for instance, if you want the SAME visit to be repeated every day, week, month or year), click on the dropdown arrow and choose what options you want.

1. **Status** - leave as the default selection (Best Available).
2. **Description** - put any notes that you want the scheduler to add to the CRU appointment notes.
3. **Subject Name** - Full Legal Name
4. **Date of Birth** - fill in the subject’s date of birth
5. **MRN** - the Medical Record Number (must be 8 digits) - if the pt does not have an MRN you will need to obtain an MRN by emailing PFS Registration “PFSRegistration@healthcare.uiowa.edu”

See note below. \*\*\*

1. **Race** - click on the dropdown and choose the race
2. **Sex** - M or F
3. **Lab Processing** - Y or N
4. **Kitchen** - Y or N
5. **Page or phone number** - enter the number that you want the frontline staff to page or call when the pt has checked in at the clinic.
6. **Visit** - this needs to be the same name that is on the Doctor’s Orders or Icart.
7. **In RN Required for this visit?** - Y or N.

RN is required for IV placement, drawing of blood from an IV, medication administration, monitoring of a subject post procedure or post medication dosing.

1. **“Users to be Notified”:** Do you want an email message about the scheduled visit to go to certain staff?

If yes, and you’re adding only one email recipient, click “Add”.

If yes, and you’re adding several email recipients, click “Add Many”.

Select a user by scrolling through the drop-down menu or type the last name of the user in the dialog box.

1. Click on the “**Create Booking**” button at the bottom. Ignore the message about “not checked against project”.
2. Important – you must fill in all the fields, or the “Create Booking” button will not become active. The only exception is that you do not need to enter anything into the “**Description**” field for the “Create Booking” button to become active.
3. You and any user you have identified as ‘users to be notified’ will receive an email when your booking/scheduling request has been approved by the scheduler.

\*\*\* You can obtain a MRN for a subject by emailing [PFSRegistration@healthcare.uiowa.edu](mailto:PFSRegistration@healthcare.uiowa.edu).

You will need to include the following information in your request:

1. Full LEGAL Name (Thomas not Tom, Susan not Sue, etc.)
2. Date of Birth
3. Full address, including zip code