How to Associate Subjects with Projects/Studies.

1. Click on “Projects”, click on “My Projects”
2. Left click (to highlight) the project.
3. Click “Edit” below the list of projects.
4. In the lower left-hand corner (in light yellow), click “Subjects”.
5. Click “Add” or “Add Many”.
6. Fill in Name, Date of Birth, MRN, Race and Sex.
7. Click **“Apply ”,** above.

How to Make a Booking with Subjects saved to a Project/Study:

1. Click on “Booking”
2. Choose your room type, then choose your date (from the calendar).
3. Click in an empty (uncolored space).
4. Pick the Project from the drop-down menu.
5. Select or De-select “Reminder”.
6. Choose “Repeat” or “No Repeat”.
7. Leave “Status” as ‘Best Possible’.
8. Fill in “Description” field as needed.
9. When you get to the “Subject Name”, fill that in.
10. Do NOT fill in sections for Date of Birth, MRN, Race, Sex (leave them empty).
11. Fill in pager/phone #, Visit, RN required, Lab processing, Kitchen.
12. Click on “Create Booking”. *The missing information (Date of Birth, MRN, Race, Sex) will not show up until you click on ‘save the booking’.* You may also have to refresh the calendar to see the data.
13. When making a booking there are rules which will do the following:

* If Subject name is not filled in, then Calpendo will reject the booking.
* If the name is “found” on the project, then Calpendo copies the DOB, MRN, Race, Sex information from the project to the booking and will accept the booking.
* If the subject and the following are filled in (DOB, MRN, Race, Sex) then Calpendo will accept the booking, but with a warning that it is ‘not checked against project’. This allows bookings to be made if the subject is not “saved” in the project yet. (i.e. new subjects that have not been associated with a project yet).
* Otherwise Calpendo will check the name with the project. If the name is not found in the project, or found multiple times, Calpendo will then reject the booking.