Manual Scheduling

INTRODUCTION

Manual scheduling allows the scheduling of a patient for an appointment outside of the standard automatic scheduling process. Also, manual scheduling makes possible the overbooking of staff members into two or more simultaneous appointments. This guide teaches the process manually scheduling a patient following these steps:

1. Access manual scheduling
2. Manually schedule the appointment
3. Manual scheduling—troubleshooting

Furthermore, this guide may help troubleshoot any problems associated with manual scheduling.

1 ACCESS MANUAL SCHEDULING

There are several possible methods for accessing the manual scheduling screen. If a visit for a study needs to be rescheduled or was completed/scheduled wrongly, access the “Manual Scheduling” screen through the “Study List.” This method starts with clicking on the “Study List” under the “Studies” tab:

Click the study name for which the appointment needs to be scheduled.

Click on the Visit Summary link to open up the list of enrolled patients.
To manually schedule the appointment after a patient is selected, follow these steps:

1. Set a date and time for the visit.
2. Select staff members for the elements.
3. Confirm the completion/scheduling of visit.

A. Select a date for the appointment by clicking the calendar icon or typing the date in.
B. Select a time for the appointment using the dropdown menu.

Note: The system cannot schedule a visit in the past or complete a visit in the future.
2. Configure staff members for the elements:

A. Select Complete/Schedule to mark that the element has been completed or scheduled as part of the visit.

B. Select the staff member(s) that will be associated with each element.

3. Once the necessary information mentioned above is filled out, click either Schedule Visit or Complete Visit, depending on the scheduling goal.

Note: When working on a visit that has been previously scheduled, the Schedule link will change to “Reschedule Visit” and there will be an additional “Cancel Visit” link.

3. MANUAL SCHEDULING—TROUBLESHOOTING

This section explains any common error messages or problems encountered throughout the manual scheduling procedure:

Why are there no fields to enter the time and date of the appointment to schedule?

The visit contains a required element with an empty role. In other words, during the study setup no staff member was specified which would fill the role required for the element to be completed.

When a visit contains an element with an empty role, that element will appear to be empty (see below).

Go to “Study Details” and click on Personnel (see next page for further details on accessing personnel list for study). For the role, select the individual who would perform it and click on “Primary, Secondary, or Backup”. If you are selecting backup, you can select multiple individuals using the CTRL key on your keyboard, and then click “Backup”. Error: “The specified appointment time does not fit within the Site’s scheduled time.”

There are several solutions to this error message:

1. Treatment rooms are not set up
2. The time of the appointment extends outside of site business hours
3. Role Sharing is not enabled

1. Treatment rooms for the site have not yet been configured. For an element and thus a visit to be successfully completed, treatment rooms must be configured where the element can be carried out. To set up a treatment room for the site, click Treatment Rooms in the “System Setup” menu under the “System Admin” tab.

Note: - Do Nothing: The element was not completed, and the visit is not considered complete (the patient may come back and complete the element, or they may never complete the visit). -Override: The element was not completed, will not be completed, and the visit will still be considered complete.

Click Add New Room on the “Treatment Rooms” screen.
2. The time and date of the appointment extend outside of the normal site business hours. It might be a day the site is designated as being closed (such as a Saturday), a holiday, or a time that the office is not open. This needs to be for the schedule for the site. To check what the schedule says, view the associated Site schedule:

![Staff and Site Schedules](image)

Open **Staff and Site Schedules**.

Click on the schedule to open it, ensure it is correct.

**Staff Schedules**

<table>
<thead>
<tr>
<th>Schedule Name</th>
<th>Status</th>
<th>Default</th>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td>123</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A. Stoning</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule 11</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule 12</td>
<td>Active</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Holidays are set at the Organization and/or Site level, so the configuration on the schedule of holidays is done separately from staff schedule configuration.

3. “Role Sharing” is not enabled, but two staff members have been selected to do the work for the element. Click **Personnel** on the “Study Details” screen to access the list of personnel and their configurable roles.

From the “Study Personnel” list select the checkbox under “Allow Role Sharing (Per Appointment)” next to the staff members’ names to enable.

“There are no elements (with time duration) defined for this visit.”

This error message will appear if the visit does not contain at least ONE element does not have a duration longer than 5 minutes. To fix this problem, return to the “Study Details” and extend the duration of ONE element to last more than 5 minutes.