HCCRC Scheduler Application

Release Notes

Version

3.7.1

Release Date

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Release Note Contents

Overview

The HCCRC Scheduler is a web-based tool that allows investigators, study staff, and CRC staff to schedule research subjects for study visits and manage CRC resources.

Minimum System Requirements

Chrome, Firefox, Microsoft Internet Explorer 11 (or higher)

Home/Appointments

The Appointments module has been removed, and all functionality has been merged into the Home module.

- The Home calendar is defaulted to the current month view.
- The Schedule New Appointment search and all filter options have been moved to the Home module.
- The filters have been moved above the visit legend.

- The Resource Timeline tab from the Appointments module has been added as a new tab to the Home module.

- The Study Members table has a new column for User ID.

Appointment Search Wizard

The process to search for and schedule visits has been streamlined. Instead of clicking the "Schedule New Appointment" button and proceeding through a search wizard, all the search fields have been embedded within the calendar page. The search criteria is now contained within a new expandable menu on the calendar page titled "Schedule New Appointment."

As items are entered into the Schedule New Appointment search, the next items in the workflow are enabled for entry. Once the Search button is clicked, the existing search functionality is implemented. The values of the search are kept after the search for additional searches.

Comments and User Information

Appointment Pop Ups

- To provide users visibility into appointment comments, all appointment pop ups have been updated to have a number indicator on the View Comments button to indicate how many comments are existing for this appointment.

- The appointment pop up pages are updated in their button texts, button look and feel, as well as button locations to provide a more consistent and streamlined user experience.

- Appointment pop up pages are updated to include the user ID of the person who performed the previous action on this appointment.

Overbook Comments

- The Comments functionality in the Overbook screens was not functioning properly. This release contains an update that enables this functionality

Other Comments

- The Visit Template Approval page Comment field is updated in its alignment and comment box behavior to be consistent with the rest of the application. This comment field was also not saving previously. The functionality has been updated to enable comment saving.

- Edit Visit Template page Comment field is updated in its alignment and comment box behavior to be consistent with the rest of the application.

Military Time

The Scheduler application is updated to use military time instead of clock time. This change applies to all places where time is referenced in the app.

Gender and MRN on Visit Summary Pop Ups

To provide users with more information while searching for an appointment, the visit summary pop up page in the appointment search wizard is updated to display the Gender and MRN information of the subject who is being scheduled.

Visibility into Appointment History (for Super Users only)

In order to provide super users visibility into the activity history of appointments, the Appointment List View page has been updated to:

- Display all appointments (previously cancelled appointments were only being displayed for up to 48 hours)

- Show an expansion of appointment history, with appointment status, time of change and user who performed the change displayed.

Table Standardization

All tables in the Scheduler application are updated to provide users with consistent pagination, filtering, sorting and navigation behavior.

Studies

- Standard pagination, filtering and sorting are applied to all tables. Note that the study subjects table would allow only full string searches as this table contains encrypted subject data. Partial string searches are not supported.

- The top filter fields in the studies page have been removed as table filtering is now available.

- PI Last name and PI first name are split into 2 columns.

- The Catalyst ID column is replaced with an IRB number column.

- The visit template approval table column order is rearranged.

- The build visit template add resource pop up table, edit resource table and copy resource table now contains a select all check box. The quantity and comment fields are also updated.

- The build visit template bulk actions page is updated with redundant text removed.

User Management

- Standard pagination, filtering and sorting are applied to all tables.

Appointment List View

- Standard pagination, filtering and sorting are applied to all tables.

- Top filtering fields are removed as table filtering is now available

- IRB Number column is removed to allow space for the splitting of Subject Last Name and Subject First Name into 2 separate columns in order to allow effective filtering.

- Note that Subject Last Name, Subject First Name and MRN fields only allow full string filtering as they are encrypted data fields.

- The Start Time and End Time columns allow date entries for either a "Select Day" filter or a "Select Date Range" filter.

Resources

- The resource tables listed in the appointment search wizard has pagination and sorting.

- After a search is performed, available and unavailable slots (blue and orange) does not have pagination and sorting.

- All other visits – scheduled, checked-in, checked-out, on hold, and cancelled – do not have sorting, but do have pagination.

Standard Reports

- You may now export a Standard Report directly to an Excel file, instead of needing to display the report to screen first.

- When a report generates an error, instead of hanging the application, a new message will appear, stating "Something went wrong. Please rerun your report with different filters or use the Report Builder. You may also want to export directly to Excel."

Resources

- Inactive resources are no longer visible on the Resource Timeline tab.

- The weekly view for the Resource Timeline tab is now defined as Sunday through Saturday. It was previously Monday through Sunday.

- Inactive resources are no longer able to be assigned as a visit's standard alternate.

- You can no longer remove the final Resource of a Visit Template. The "Delete" link has been removed from a Resource when it is the last Resource assigned to a Visit Template.

- On the Resources page, the "Filter By:" label has been changed to read "View:"

- When creating a new resource, the field "Existing Resource Name" has been removed.

Subject Duplication Handling (Epic enabled only)

Epic actively monitors their patient index and will merge subjects with separate MRNs that they determine to be the same subject. In some cases, duplicate records can result from such processes. Since Epic's EMPI is the single source of truth for patient records, we need to resolve the resulting issue in Scheduler. Two methods are now enabled to correct this issue:

1. In certain clearly defined situations, specified users can manually remove duplicate subjects. This is done by editing the subject details, and selecting a new MRN.
2. In all other cases, the system administrator should be contacted. The Partners' system administrator has been provided with the tools to remove duplicate subjects or MRNs.

Application Support Form & PHI Warnings

Due to Zen Desk's discontinuation of support for the form widget, Scheduler application support has been moved to the Help link. Upon clicking the Help link (located in the lower right corner of the Scheduler app), a "Contact Us" form will be displayed. Filling out this form and sending it will open a Zen Desk support ticket to the Scheduler team. Note that this functionality replaces the previous Support tab.

Additionally, in response to users sending PHI through support channels, two changes have been made to the support links on the bottom of the page:

- The email link on the bottom of the page now automatically inserts text into the body of the email stating "Reminder: Sending PHI in this email is strictly prohibited."
- The "Help" link in the bottom right of the page now displays a pop-up stating "Warning: Sending PHI through the help desk is strictly prohibited." After clicking the OK button on the pop-op, the existing support widget will pop up.

Known Issues

- In the resources module temporary adjustment table, the sort icon on the end date column does not always sort the column by end date.

- When editing a temporary adjustment, the start time field does not allow a time that is prior to the current time.

- (BIDMC Only): when adding a new study team member, the system allows the same study member to be added twice.