University of Nebraska Medical Center

Center for Clinical and Translational Research Standard Operating Procedure

Nebraska Medicine

Section **Clinical Research Center**

Title: **Scheduling Visits**

SOP Number: **SOP- 28**

Date Created: **November 1st, 2010**

Date Reviewed/Modified: **April 1, 2019**

Version Number: **4**

PURPOSE: The purpose of this standard operating procedure (SOP) is to promote efficiency, communication and workload tracking within the department by maintaining a correct and up-to-date schedule of subject study visits.

SCOPE: This SOP applies to all study personnel involved in the scheduling of study appointments within the Clinical Research Center (CRC) clinical area or committing time for a clinical trial study visit in other areas of the medical center.

PERSONNEL RESPONSIBLE: Study Coordinators and/or CRC staff assisting with scheduling subjects.

PROCEDURES:

In order to ensure coordinator, research assistant, equipment and room availability all subjects' visits, including phone visits, are scheduled in One Chart CRC clinic scheduler.

- Outpatient studies – All visits, including telephone visits, are scheduled according to the protocol timeline and assigned the appropriate time estimated by events of the visit.
- Inpatient studies – Time spent by coordinators and research assistants on inpatient visits are accounted for on the CRC One Chart clinic scheduler. The coordinator enters the visit on the provider calendar only, since no CRC space is used for this type of visit.
- Study assessment procedures scheduled with ancillary departments (e.g., x-rays, laboratory test, DEXA, MRI's) are added to the appointment notes.
- Missed appointments are rescheduled as soon as possible according to the protocol and subject limitations.
- Rescheduled visits are updated in One Chart to reflect the actual visit date.
- For each visit there are appointment notes included, listing the following information
    - Study name
    - Visit number
    - Pertinent nurse notes for the visit (i.e., Labs, ECG, Blood/Urine Processing/Shipping or SPACE ONLY)

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Staff Accountability:

Developed By: Director of Clinical Research Operations, Clinical Research Center
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Department Approval

Signed LuAnn Larson
Director of Clinical Research Operations

Signed
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