DAISY SCHEDULING: Data Entry, Offsites, Rescheduling

1. **Participants Due for Clinic Visit:**
   A. Open the Daisy web database http://daisy.ucdenver.edu/Login.asp. Click on the Scheduling → Subject Due on left menu. To see who is due for clinic in each group, click on one of the lists for the calls you are going to make. This will bring up a list of subjects who are due for a clinic visit.
   B. Enrolled siblings are usually due at the same time and they will be next to each other in the list. However, if one is positive for antibodies they may get off track. Other enrolled siblings are listed on the scheduling page under *Daisy Enrolled Sibling*. To see when the last visit was for an enrolled sibling and how often they come in (every year, every 6 months, or every 3 months), click on the Family tab/Sibling and select the enrolled sibling you are checking on. If the sib is due within a few months it may be best to bring that sib in at this visit or wait for the positive subject's next visit.
   C. ==**Always look at the Contact Comments Section AND scheduling comments from previous years before calling the family.**== View by clicking the contacts tab. Information about how to contact the family or family structure (parents are divorced, family deaths, etc.) will be in this section.
   D. All Daisy appointments are allotted an hour in the scheduling system by default. If more than one child will be coming to the visit for a blood draw, allot two hours. If no two hour slots are available, it's ok to allow 1.5 hours. Saturday appointments should always be an hour per participant.

2. **Data Entry**
   A. Record EVERY attempt to contact in the DAISY web database, including when you schedule a visit. Record # called, call outcome, and any information that would be useful for the next person who calls that family. If you've scheduled a visit, include the date and time of the appointment.
   B. Once you have the parent or participant on the phone to schedule a visit:
   - Click the link on the scheduling page that will take you to the scheduling system. The link takes you to http://td-schedule.ucdenver.edu/
   - Choose DAISY for the study
   - Look the subject up by last name or ID
   - Select the visit type from the drop down box
   - Let participant know approximately when they are due for their clinic visit and ask what day/time works best for them
   - **Always have the overall clinic schedule open for the day to determine if the time and date that the participant requests will work for both the clinic and lab.**
   - Select the day on the calendar and then select Ped Exam room 1, 2 or 3 (you can use Ped 4, 5, or 8 if necessary but those are used for TEDDY visits).
   - The column next to the time indicates the number of other DAISY/TEDDY appointments that are scheduled in other rooms at that time. Do not schedule if the number is higher than the max number of appointments per time slot.
   - Click on the + sign next to the desired schedule time and choose an available staff member from the **Schedule with:** drop-down
   - After selecting the staff, enter any useful comments (i.e. need fasting insulin, MH req, etc.) and click **Update Schedule**.

- Return to the Contact tab on the DAISY web database and confirm the mailing address. Ask if the participant wants the diet survey and map to be sent to the "Participant" or "Primary" (family) address.
- Be sure to click on the "resend map" button in the database if the family needs another map sent out (typically needs to be done if you are rescheduling a family to come in during a different month than they were previously scheduled – the parking code will be different)
- If a parent requests a specific clinician for the visit, please make a note in the scheduling database and also in the DAISY database.
- **Please note not all clinic staff members can see DAISY participants. Make a note of who cannot see DAISY visits and do not schedule with them**

C. **Please explain the parking procedure while you are on the phone:**
- If being seen at the BDC, they will not receive a packet. Diet surveys will be given at check-in. Parking code can be texted or emailed.
- If being seen off-site, they should receive the diet survey and directions to the Children's Hospital location 2 weeks prior to their appointment (packets are sent 3 weeks in advance by the front desk). If they would like to receive it sooner, accommodate that request.
  - If no diet survey is needed, offer to e-mail or text the address and directions to Children's.
- They first park their car then go to the parking kiosk at the entrance of the parking lot.
- Only need to enter license plate #, no receipt needed.

3. **Rescheduling a visit**
- If family needs to reschedule, cancel their appointment in the **Visit Schedule** section of the **Scheduling** tab in the DAISY web database. For Missed Appt 1: (or 2 or 3) enter the date of the appointment you're rescheduling. From the "Why" drop-down, select "They Cancelled" and Save Changes.
- Following the scheduling procedure above to schedule a new appointment time.
- If all "missed appointment" fields are full, you will need to change an appointment in the Scheduling web database. You must start over, meaning: click on Subject Scheduling and look up the subject up again. Open that subject's visit and click **Cancel**. Then "start over" to schedule the visit again. **Only one change can be made at a time.** If you try to make more than one change, the appointment will show up as DAISY/TEDDY with no names attached (a "blank" or "ghost" visit). You will have to email the data management team to fix this problem.

4. **Adding a Sibling to a Subjects Appointment**
- First, schedule one sibling how you normally would.
- After you click **Update Schedule** in the scheduling system, start all over again and look up the same sibling you just scheduled. The appointment exam room will be red: click on it and click on + sign for that subject again. Click **Add a Relative Visit**
- Select the sibling
- Select the study
- Select the VisitType
- Click **Update Schedule**, and both subjects should appear on the scheduling calendar under the same appointment time.

5. **Scheduling an Offsite Visit (Main TCH, Broomfield, Littleton, and Parker**

A. Offsite visits are only offered on certain dates. Generally:

- Littleton (Highlands Ranch or "South" campus) is the 1st Friday of every month. Sometimes a 2nd Friday is added for DAISY only (if this is the case, try to schedule on that Friday instead of the 1st).
- Parker visits are the 2nd Monday.
- Broomfield is the 3rd Tuesday.
- Wheat Ridge is the 4th Friday.

B. **The TCH offsite days are limited to 5 subjects per clinician, with appointments scheduled on the ½ hour and lasting only 30 minutes. Clinicians call the family 1-2 days before to complete paperwork over the phone.**

C. To schedule an offsite visit:

- Open up the daily staff schedule for that day. The visits are scheduled for 30 minutes per child and each half hour that is available is marked as a "meeting." This makes it easy to quickly see what times are available for the offsite locations.
- Once you find a time and date that works for the family, delete the "meeting" in the scheduling calendar and proceed to schedule as described below.
- In Subject Scheduling in the scheduling system, look the participant up by last name or ID number
- Select visit type
- Choose the appropriate Off-Site (OS) clinic room. Each site has 2-3 options to be able to accommodate more than one clinician:

Select	OS TCH Priority	0
Select	OS Littleton Priority	0
Select	OS Parker Priority	0
Select	OS BF Priority	0
Select	OS TCH2 Priority	0
Select	OS Littleton2 Priority	0
Select	OS Parker2 Priority	0
Select	OS BF2 Priority	0

- Click the "+" sign under the time you want to schedule
- Choose the correct clinic staff member who will be at the site and click "Update Schedule"
- In the DAISY web database, under the Scheduling tab, enter in the **Visit Comments** field: TCH off site: Parker, Littleton, Wheat Ridge or Broomfield and click "Save Reminder Call and Visit Comments"
- Click "Emailed Map" in the database, so the family doesn't receive a map to our clinic.
- The front desk will send out these packets. However, if you need to send one, you will need to mail or e-mail a letter that corresponds with their offsite visit location. If they are under 18, send EMLA cream.
  - Letters can be found at: L:\Front Desk\DAISY MOO\DAISY Packets\DAISY OS → select the appropriate letter
  - EMLA cream instructions L:\DAISY Long-Distance Protocol\LDP Forms\Forms for Regular Kits→ EMLA Cream Instructions