

SCHEDULING-Clinicians Notes

Check DAISY voicemail often! To get to the DAISY voicemail dial **46245** then ***#** when it asks for your security code. Then enter mailbox number **47622**. The security code is **1217**.

1. **ALWAYS** leave comments in the scheduling section ANY time you have contact with a family member. **Good notes will make your life MUCH easier down the road!**
2. If you notice more than ONE visit type in the drop-down box when you are scheduling, let the Data Management team know. One will need to be deleted.
3. Pay attention to siblings! Are they due? What type of visit? How old are they? Make clear notes about who is scheduled and when. You will need to schedule ALL siblings under the same ID.
 - a. See "DAISY Scheduling (2017)" located in S:\BDC\DAISY\DAISY MOO\Scheduling\Procedures
4. **Change visit type for OGTTs** under **Scheduling** → **Visit schedule**

Date Due: 6/17/2017	Visit Type: Every 3 mo OGTT? <input type="button" value="Select option if doing OGTT"/>	Ivy: Yes	Last Visit Date: 3/18/20
Accelerometer Visit			
Date Scheduled:	Room:	Send map? Not sent	
Staff:			
Missed Appt 1: <input type="text"/>	(mm/dd/yyyy)	Why: <input type="text"/>	
Missed Appt 2: <input type="text"/>	(mm/dd/yyyy)	Why: <input type="text"/>	
Missed Appt 3: <input type="text"/>	(mm/dd/yyyy)	Why: <input type="text"/>	
<input type="button" value="Save Changes"/>			
Choose another clinic track for this subject			

5. CHECK that you have *actually* scheduled the participant:
Is there a **date, time, and location** filled in next to Date Scheduled?

Date Due: 6/1/2017	Visit Type: Every year
Date Scheduled: 6/6/2017 11:00:00 AM Peds Exam 2 Click here to go to scheduling system	
Date of Reminder Call: 6/5/2017	
Visit Comment:	
<input type="button" value="Save Reminder Call and Visit Comments"/>	

SCHEDULING

If it's blank (or is any above component is missing), make sure the visit is on the Scheduling Calendar. If YES, notify the Data Management team. The clinic track will need to be updated with scheduling information on the back end. If NO, then the participant simply wasn't scheduled. Try again.

Do they show up on the Scheduling Calendar? Make sure it's not blank!

6. **CANCELLING APPOINTMENTS-** do this through the DAISY Application!!!! Otherwise, will result in a blank clinic visit on the scheduling calendar that you will need to have Hanan or Danny delete through the back end. Go to **Scheduling → Visit schedule**.

In the first available "Missed appointment" text box, enter the date of the appointment that is currently scheduled and select an option from the "Why" drop down box. Click **save changes**.

Exception: IF ALL THREE "Missed Appt" text boxes are filled in, you must ALSO cancel the visit through the scheduling system. Update one of these text fields to the most recent appointment date that is being canceled, then cancel the visit on the scheduling calendar.

7. Scheduling Subjects without a clinic track (scheduling tab is blank)

a. Surveillance Subjects (Enrolled: Surveillance)

- i. These will either be participants who we haven't seen for a long time, or they were formerly long-distance participants who are no longer eligible for receiving blood kits.
- ii. You can only add an **LTF track** for subjects who are **Enrolled: Surveillance**

Family: 00684	Contact ID: 1	Relationship: Study subject	Enrolled: Surveillance
Parent:		00684-1	
Parent:		00684-2	

T-Cell Subject Control Eligible

Not Due for Clinic

The last clinic visit was on 9/29/2016.

[Add a clinic track record for this subject](#)

Visit Type:

Family needs DAISY Family Advocate

[Choose another clinic track for this subject](#)

[Look up another subject](#)

[Return to Reminder Calls Subject List](#)

Select visit type ▼

- Select visit type
- Every 3 month
- Every 6 month
- Every year
- Redraw
- LTF**
- Fasting blood draw
- Accelerometer only
- CGM only

- iii. click "Add New Record" to add a new clinic track.

[T-Cell Subject Control Eligible](#)

Not Due for Clinic

The last clinic visit was on **9/29/2016**.

[Add a clinic track record for this subject](#)

Visit Type:

Family needs DAISY Family Advocate

You can now schedule as usual.

b. Enrolled Subjects

Similarly, some participants may want to schedule before their new track is added. You'll know the difference because these participants are **Enrolled: Enrolled**.

If this is the case, select the appropriate visit type from the drop-down and click "Add New Record"

Family: 00994	Contact ID: 1	Relationship: Study subject	Enrolled: Enrolled
Parent:			00994-1
Parent:			00994-2

Not Due for Clinic

The last clinic visit was on **8/17/2016**.

[Add a clinic track record for this subject](#)

Visit Type:

Family needs DAISY Family Advocate

[Choose another clinic track for this subject](#)

[Look up another subject](#)

[Return to Reminder Calls Subject List](#)

- Select visit type
- Select visit type
- Every 3 month
- Every 6 month
- Every year
- Redraw
- LTF
- Fasting blood draw
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