

## DAISY Scheduling Protocol Summary

### ADDING PARTICIPANTS TO CLINIC TRACK

(Do Before Postcards)

On the 5<sup>th</sup> of each month (do on the same day as sending out postcards), subjects that are due in 3 months need to be added to clinic track so we can start the scheduling process (postcards get sent). Subjects due the next month need to get their interviews ready for their upcoming visit. To add the participants to clinic track, follow the procedure below:

- In the online DAISY database, go to the scheduling tab on the left-hand side → clinic track tasks → click to add records
- A list of participants who are due in three months will pop up
- Check stored procedure updates (for a limited time): Go through the participants who are on the 3 and 6 month protocols and check that a call record was added for everyone who needs an annual update interview
  - To decide if an interview is needed, look up the participant and look at the call date of their last interview. If it has been a year or close to it (remember this is from three months out) and a call record has not been added, click on “add new call record”
  - If you accidentally exit out of the list of clinic and call track records, you can bring it up again by going to go to the scheduling tab on the left-hand side → clinic track tasks → view new clinic and call track records added today
- Check any Every Year participants who did not receive a new call record today. Add a call record if needed.
- After you have finished checking call records, go to S Drive → DAISY → DAISY DATABASES → ChartClinicPrep → Add Clinic / Call Track → Print next month’s Annual Update → Wait for query to load → Print
  - Note the total number of cover sheets in the report. You will need to print this many annual interview packets in a later step
- Click “yes” for all prompts when exiting the database
- Staple an interview to each “Update Interview” cover sheet.
  - Interviews are found in S:\DAISY\DAISY MOO\PRA Training Documents\Chart and Scheduling Materials → “Interview”
  - Print to front desk
  - Choose “Offset” option in “Advanced” tab on printer (or under Properties/MyTab)
  - Choose double-sided printing
  - DAISY printer code: **28951**

- Take the stack of prepared interviews to the basket in the file room “DAISY to be filed”
- Email the staff member(s) responsible for mailing postcards that postcards can now be sent

### **SCHEDULING POSTCARDS**

Scheduling postcards get sent out to all participants on an annual protocol 3 months before their visit. Sending these postcards this far in advance ensures that all of our families are getting an equal chance at scheduling for an evening or Saturday appointment. The postcards should be sent out sometime **between the 5<sup>th</sup> and the 10<sup>th</sup> of every month**. To send them out, follow the procedure below:

- Go to My Computer → S Drive → DAISY Databases → ChartClinicPrep → Postcard Reminders
- When prompted for a start date, enter the first day of the month that these children will be due, **which is three months from now** (for example, if you’re sending out the scheduling postcards in January, enter 4/1/20--since April is 3 months after January).
- When prompted for a stop date, enter the last day of that month (4/30/20--to go with the example above)
- Address labels will generate. Put however many pages necessary of 1”x 2 5/8” (Avery 5160) labels in to the printer and print.
- Close that document and click “yes” to update the access queries.
- Go through these labels and cross out any double addresses due to siblings – we only need to send one per household.
- Close the document and click “yes” to update the access queries
- Next, go to My Computer → L Drive → DIASY MOO → Scheduling → Procedures → SchedPostcard
- Change the month on the postcard document to correspond with the month these participants are due (again, three months from today)
- Put the blank yellow 5x7 postcards into the printer and print enough postcards to correspond with the labels
- Put the labels on the postcards and place them in the outgoing mail box with the metered mail form.
- If you need more yellow postcards contact printing services.

### **SCHEDULING**

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.

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.

**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.

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.

### Data Entry

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.

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**

**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.

### **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 Danny, Hanan, or Rachel to fix this problem.

### **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.

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

Offsite visits are only offered on certain dates. Generally: "Littleton" (Highlands Ranch or "South" campus) is the 1<sup>st</sup> Friday of every month. Sometimes a 2<sup>nd</sup> 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 2<sup>nd</sup> Monday. Broomfield is the 3<sup>rd</sup> Tuesday. Wheat Ridge is the 4<sup>th</sup> Friday. TCH Main appointments are for OGTTs through Trial Net only.

**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.**

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:

<a href="#">Select</a>	OS TCH Priority	0
<a href="#">Select</a>	OS Littleton Priority	0
<a href="#">Select</a>	OS Parker Priority	0
<a href="#">Select</a>	OS BF Priority	0
<a href="#">Select</a>	OS TCH2 Priority	0
<a href="#">Select</a>	OS Littleton2 Priority	0
<a href="#">Select</a>	OS Parker2 Priority	0
<a href="#">Select</a>	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

#### **Scheduling/Appointment Guidelines:**

- Always have the All Staff Scheduling Calendar open when looking at available times for appointments. This prevents scheduling an appointment in the system for someone who has an override, or when the max number of visits for the time slot has been reached.
- No more than a total of six appointments can be scheduled at the same time due to space and lab staff availability.
- Never schedule more than **five** appointments per clinic staff a day unless you have spoken with them and been given an OK to do so.
- There are 3 DAISY stocked rooms, and 3 TEDDY stocked rooms. 1 of those rooms can have a DAISY or TEDDY appointment.
  - Exam rooms 1-3 are DAISY
  - Exam rooms 4,5 & 8 are TEDDY
- EVERY time you speak to or email with a family, record the contact in the scheduling attempts section for the subject.
- Please be appropriate and sensitive when recording comments in the scheduling attempts. If sensitive information needs to be recorded, use the C-Log and direct staff members there for family updates.
- Always check if a family has requested a certain clinic staff so that you can look for their availability. If a specific person is requested for the visit, please include this in the comments of the scheduling system when making the appointment. This will prevent a family being moved to an alternate clinician on the same day.
- If a family calls and cancels for the day, or if you move a subject to another clinician, call the front desk and lab to notify them of the change.

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- To have a comment show up on the scheduling system, write them on the “Visit Comments” section in the DAISY database (located right above the calling comments area). Always write in when a certain clinic staff needs to be scheduled with them, blood draw notes, etc.
- Try to only schedule on the hour (i.e. 8:00am, 9:00am, etc.) instead of the half hour so that more appointments can be scheduled per day.
- Schedule 1 hour appointments for each participant (TEDDY or DAISY)
- Clinic staff should update No-Show appointments within an hour of the scheduled visit time. This timely update allows the subject to update on the appropriate calling list.

### **Scheduling Guidelines for Lab staff availability: Maximum numbers**

<i>Time</i>	<i>Maximum appointments for Monday</i>	<i>Maximum appointments for Tuesday</i>	<i>Maximum appointments for Wednesday and Thursday</i>	<i>Maximum appointments for Friday</i>
8:00am	2 subjects	2 subjects	2 subjects	2 subjects
9:00	5 subjects	5 subjects	5 subjects	5 subjects
10:00	6 subjects	6 subjects	6 subjects	6 subjects
11:00	4 subjects	4 subjects	4 subjects	4 subjects
12:00pm	2 subjects	2 subjects	2 subjects	2 subjects
1:00	6 subjects	6 subjects	6 subjects	6 subjects
2:00	6 subjects	6 subjects	6 subjects	6 subjects
3:00	6 subjects	6 subjects	6 subjects	4 subjects
4:00	3 subjects	5 subjects	5 subjects	
5:00		3 subjects	4 subjects	
6:00pm			3 subjects	

### **Evening/Saturday/Offsite Appointments**

- When families arrive late for evening or Saturday appointments, both clinic and lab will accommodate and see the family
- If family is more than 30 minutes late for an appointment, clinic staff will try to perform blood draw earlier in visit. Cold spray can be used for immediate blood draw, rather than waiting for EMLA.
- **Please notify lab staff of last-minute evening or Saturday cancellations**
- Kathy Waugh or Hali will periodically block time out in the scheduling calendar due to lab staff availability
- Late arrival families on Saturdays can disrupt the clinic flow since the visits are scheduled back to back, every hour between 8am and 12pm. Clinic and lab will do everything possible to accommodate the family, even if it means that clinic staff will get the next family started and have the late family wait. Each family will be dealt with on a case-by-case basis. If a family no-shows or is frequently late to a Saturday appointment, we cannot offer them future Saturday appointments. Note this in the database so that all attempts can be made to encourage the family to come during the week for future visits.

### **Disenrollment/Surveillance Protocol**

If a parent or participant tells you they are thinking of disenrolling try and find out why and see if there is anything we can do to change their mind like try a Saturday/evening appointment, wait a few

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months until things settle down for them, skip this year's visit, offer LDP options, off-sites, etc. If they are still not interested, let them know that we have the Surveillance protocol as an option. Instead of coming in for a clinic once a year, we will do an annual follow-up only to ask if the subject has developed type I diabetes or celiac disease. If at any time they wish to come in again, we will certainly honor that. If the parent/subject agrees, UPDATE ALL CONTACT INFORMATION and change their "Enrolled" status to "Surveillance."

If the parent/subject is adamant about disenrollment (they do NOT agree to Surveillance), use process below and for those who have been sent a B letter more than a month ago. **Do NOT fill out form for someone who is positive.** Tell Michelle if a positive subject wants to disenroll.

- Enter the contact info in the schedule call attempts and the reason for disenrollment.
- Print the report, fill out and attach a disenrollment form and give to Michelle for her approval signature (she should then give these to Rachel, if she gives them back to you put them in Rachel's box).

## MAPS AND PARKING

We no longer send out maps. You may e-mail a family a map by editing the "DAISY Map" word doc in **S:\DAISY\DAISY MOO\PRA Training Documents\Chart and Scheduling Materials** and attaching it to an appointment confirmation e-mail.