

1. Go to → <https://www.med.upenn.edu/apps/itmat/cse/>
2. Log in using your PennKey credentials
3. Click the 'New Request' button in the top left corner

4. Navigate through the different tabs of the request form
  - a. **Requesters** – this page will automatically have the user that is logged in listed as a requester. Additional requesters may be added from this tab. *\*Please note, a request can only be edited by an individual on the requester list.*

- b. **Participant** – List participant’s first and last name, MRN, and DOB.

- c. **Study and Visit** – Enter CHPS ID, drug availability with IDS (if applicable), and visit type.  
 i. Visit types include inpatient, outpatient, scatter site, hybrid oncology admission, and space only.

- d. **Appointment** – Enter all appointment details on this tab.  
 i. Location  
 ii. Appointment Start and Length  
 1. An alternate appointment field is located on this tab. If there is flexibility with the date that is being requested, please provide an alternate. This will limit back-and-forth with requesters and CHPS staff.

- 2. *\*Please note, early appointments (7am-11am) are prioritized for fasting and long infusions.*
- iii. Additional Visits
  - 1. This question is for any other visits a participant has scheduled on that date and helps CHPS staff account for any delays, time off the unit, etc.
- iv. Meals
- v. Provider Present on CHPS
  - 1. Please select ‘yes’ if the participant will see their provider on the unit. This includes oncology visits in which clinic visits are scheduled on the participant’s appointment desk for the same day.
- vi. C1D1
- vii. Description
  - 1. Please utilize this field to add cycle/day, if this is a screening visit, dietary needs, etc.

**e. Documents**

- i. How will participant consent?
  - 1. Participant has an active consent on file with CHPS
  - 2. Participant will be consented on the unit

3. Consent is attached to request (the option to add a document is on this screen)
- ii. It is preferred that consents be submitted via the Scheduler. They will be uploaded to PennChart during scheduling. If a participant does not have a consent on file, they are not permitted to go back into the treatment area.

The screenshot shows the 'CHPS Scheduling Emailer' interface for 'Edit Request 93320'. The 'DOCUMENTS' tab is selected in the navigation bar. Below the navigation bar, there is a section for 'Supporting Documents' with an 'Add Document' button and a note: 'You can upload additional documents here. This communication will be fully HIPAA compliant.' At the bottom right, there are 'Save and Previous' and 'Save and Next' buttons.

**f. COVID Screening**

- i. Please ask the participant these questions prior to submitting the request. These responses are recorded in PennChart.

The screenshot shows the 'CHPS Scheduling Emailer' interface for 'Edit Request 93320' with the 'COVID SCREENING' tab selected. The form contains several questions with checkboxes and radio buttons:

- Fields marked with an asterisk (\*) are required fields
- How will participant consent? \*** (Dropdown menu)
- Supporting Documents** (Add Document button)
- Is the participant experiencing any of the following symptoms (select all that apply)? \***
  - New cough
  - Fever above 100.0 F
  - New difficulty breathing/shortness of breath
  - Chills or shaking chills
  - New loss of sense of taste/smell
  - No symptoms
- In the last 14 days, has the participant been in contact with someone who has a new fever, new cough, new shortness of breath, or been newly diagnosed with COVID-19? \***
  - Yes
  - No
- Does the participant have a COVID-19 test pending? \***
  - Yes
  - No
- Has the participant tested positive for COVID-19 in the last 10 days? \***
  - Yes
  - No

At the bottom right, there are 'Save and Previous' and 'Save and Next' buttons.



an alternate visit time or room, incorrect CHPS ID attached to request.

**Hello – We were unable to confirm your request at this time. Please see below.**

Request ID:  
93303  
CHPS ID:  
3003  
Location:  
Dulles 161 (Outpatient)  
Appointment Modifications Requested:  
**test modify status**

Please click the link below, edit your request to make the requested modifications, and resubmit your request.

<https://staging2.med.upenn.edu/apps/itmat/cse/requests/93303/wizard>

To coordinate your request, you may also contact:

- HUP or PCAM: Brittany Foxworth at [Brittany.Foxworth@penmedicine.upenn.edu](mailto:Brittany.Foxworth@penmedicine.upenn.edu), Samantha Brumbaugh at [Samantha.Brumbaugh@Penmedicine.upenn.edu](mailto:Samantha.Brumbaugh@Penmedicine.upenn.edu), or Amanda Brock at [Amanda.brock@penmedicine.upenn.edu](mailto:Amanda.brock@penmedicine.upenn.edu)
- EMU and CPU: Margaret Evangelisti at [Margaret.Evangelisti@penmedicine.upenn.edu](mailto:Margaret.Evangelisti@penmedicine.upenn.edu)
- Presbyterian: Patricia Obrien at [Patricia.O'Brien@penmedicine.upenn.edu](mailto:Patricia.O'Brien@penmedicine.upenn.edu)

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### c. Request denied

- This email will confirm that the visit was denied. Please locate bold text in the email for denial reasons. Denial reasons typically include incomplete information in PennChart or the study not being linked to the participant's chart. The denial reason is also located on the bottom of the request in the edit screen.

Your request for an appointment has been denied.

Request ID:  
93400  
CHPS ID:  
3246  
Location:  
Dulles 1 (CHPS Inpatient)  
Reason for denial:  
**Do not pass go, do not collect \$200.**

If you wish to make changes to your request and resubmit, please visit: <https://staging2.med.upenn.edu/apps/itmat/cse/requests/93400/wizard>

To coordinate your request, you may also contact:

- HUP or PCAM: Brittany Foxworth at [Brittany.Foxworth@penmedicine.upenn.edu](mailto:Brittany.Foxworth@penmedicine.upenn.edu), Samantha Brumbaugh at [Samantha.Brumbaugh@Penmedicine.upenn.edu](mailto:Samantha.Brumbaugh@Penmedicine.upenn.edu), or Amanda Brock at [Amanda.brock@penmedicine.upenn.edu](mailto:Amanda.brock@penmedicine.upenn.edu)
- EMU and CPU: Margaret Evangelisti at [Margaret.Evangelisti@penmedicine.upenn.edu](mailto:Margaret.Evangelisti@penmedicine.upenn.edu)
- Presbyterian: Patricia Obrien at [Patricia.O'Brien@penmedicine.upenn.edu](mailto:Patricia.O'Brien@penmedicine.upenn.edu)

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### d. Request canceled

- This email confirms that the request to cancel a visit was completed by CHPS staff.

Your request for an appointment has been cancelled.

Request ID:  
93400  
CHPS ID:  
3246  
Location:  
Dulles 1 (CHPS Inpatient)  
Appointment Date:  
**06/30/21 2:00 PM**

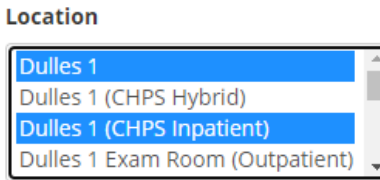
See the details of your request here: <https://staging2.med.upenn.edu/apps/itmat/cse/requests/93400>.

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## 6. Utilizing Features on the Dashboard

- Quick filter buttons are available to see 'All Pending Requests' and 'Today's Confirmed Requests'.
- Filters to view requests that have a status of Unsubmitted (drafts), Canceled, Pending, Pending Cancellation, Denied, Approved, or Modifications Requested are located at the top of the dashboard.

- c. User-specific preferences are saved from the previous log in. This includes filtered locations. To filter by multiple locations, hold the 'Ctrl' button on your keyboard and select which locations to view.



- d. Located under the filters on the dashboard, there is a list of requests and a button labeled 'Actions' to the right of each request.

Appointment Date	Date requested		
	06/07/21 1:47 PM	Actions	View
05/11/21 2:40 PM	04/07/21 3:35 PM	Actions	View

- Edit
- Copy
- Cancel

- i. From the 'Actions' button, the requestor is also able to edit and resubmit the request or cancel it.
  1. Edit – The edit function is useful for rescheduling a visit, editing to meet requested modifications, or adding other necessary information or documents to the request.
  2. Copy – Clicking this button allows a request to be copied. This feature is helpful for scheduling multiple visits for the same participant/study.
  3. Cancel – This button initiates a cancellation workflow. If a visit needs to be canceled, please utilize this button. This request will move to 'Pending Cancellation' status until CHPS staff acknowledges and confirms the cancellation on their end.