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PURPOSE: To provide adequate information in a standardized and systematic way to CHPS staff and clinical trial study teams regarding the process of scheduling participant appointments on Perelman (PCAM) 4 and on Dulles I.

SCOPE: Principal Investigators, Clinical Trial Study Teams, and CHPS staff

PROCEDURE:

1. Prior to scheduling a CHPS appointment, the following conditions must be met:
    a. IRB Approval obtained
    b. CHPS # obtained
    c. PI/Coordinator Agreement signed
    d. Nursing worksheets and Training Document approved (see SOP#2)
    e. In-service completed (see SOP#3)
    f. Participant has a medical record number (MRN) in PennChart (To create: please complete the form and follow instructions at the end of the SOP)
    g. Participant is linked to Research Billing Number (RBN) in PennChart
2. All CHPS appointments are made by completing the appointment request form in the CHPS Scheduler at: www.med.upenn.edu/apps/itmat/cse/requests. For a step-by-step guide, please see the CHPS website (www.med.upenn.edu/CHPS) > CHPS Applications > CHPS Scheduler > CHPS Scheduler Tutorial.
3. In addition to the required fields on the CHPS Scheduler, please be mindful that:
    a. Full copy of the signed informed consent form must be included in the appointment request for the participant's first study's visit.
    b. If the PI is not a MD or DO, the study team will need to identify a MD or DO to be listed as a referring provider in Epic. This medical doctor must have admitting privileges at HUP.

    Turn-around time for lab results and drug delivery should be factored into the calculation for length of visit. Average time for STAT CBC is 30-60 minutes (pending manual diff) and 60-90 minutes for OCOMP

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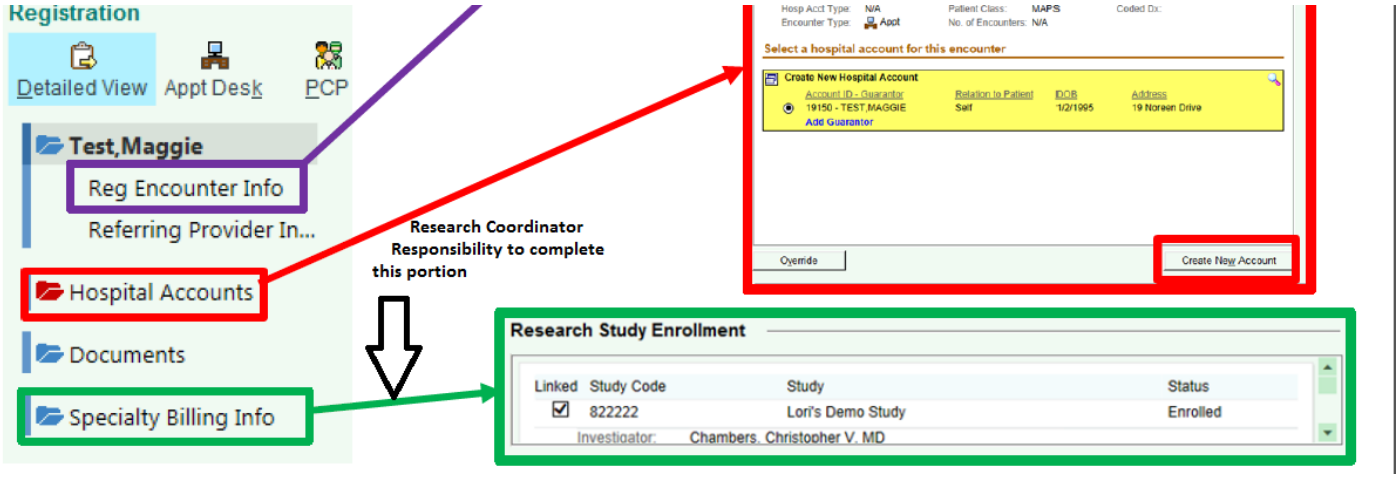
   c. If the participant requires a room with either a bed or a chair, please specify in the initial request to ensure availability upon the patient's arrival.
   d. If a History and/or Physical exam is included in the requested services, please specify who will be performing the exam and that they have confirmed their availability in "Description of Visit". Requests that do not to specify who will perform the exam and whether they have confirmed their availability will be denied.
   a. Requests that do not include essential information could result in the request being denied.

4. All requests need to be confirmed by CHPS staff; an email will be sent to requester stating whether the visit was approved or denied.
5. Long PK days (over 7 hours post-infusion) can only be scheduled between 7am and 8am.
6. **Outpatient requests must be submitted at least 24 hours in advance.** This includes requests for space usage, blood draws, vital signs, and/or EKGs. Same day add-ons will be evaluated on a case-by-case basis depending on space and resource availability.
7. **CHPS cannot guarantee availability for requests made within 24 hours.** Because CHPS ensures safety for all participants, we may not be able to accommodate your study visit due to staffing and acuity (including requests that the study team had forgotten to make) if less than 24 hours' notice is given.
8. Outpatient weekend requests are approved on occasion and require approval by the CHPS Nurse Manager. Please submit requests for weekend visits at least **3 weeks** in advance.
9. It is advised that clinical study teams meet their participants at the CHPS unit, or meet at an alternate location and present to CHPS together, at the scheduled appointment time. After the participant has been identified and an ID wrist bracelet has been secured on the subject, the CHPS Patient Services Coordinator will notify a CHPS staff member who will assign the participant to a room.
10. At the participant's first outpatient visit, the clinical study team needs to give a full copy of the signed informed consent form to the Patient Services Coordinator, if it was not provided as an attachment in the scheduling request.

If the study consenting is done at CHPS, the study coordinator must provide a copy of the full signed informed consent form before proceeding with the study visit.

11. On the day of scatter site visits, the coordinator requesting the scatter site should communicate with the CHPS Charge Nurse to determine the exact time(s) the CHPS staff will be deployed for that day.
12. If a same-day scatter site request is made,-please call the CHPS Charge Nurse to confirm the appointment time and whether the CHPS staff will be available to perform the requested services. CHPS may not be able to accommodate same-day requests due to staffing ~~and~~ if less than 24 hours' notice is given.
13. CHPS does not accept verbal confirmation for any visit; checking with the Charge Nurse to see if visit is possible does not confirm the visit. A request needs to be submitted and the Patient Service Coordinator will then schedule the ~~scatter site~~ visit accordingly.
14. ~~14.~~ Inpatient requests must be submitted at least **3 weeks** prior to admission date. Include the time of discharge with the discharge date in "Appointment Date" on request.
15. For inpatient study admission, CHPS staff links the study to the participant in the Specialty Billing Info section in EPIC. See screenshot below:



16. If an appointment is rescheduled to a **different time on the same day** as the initial request, a cancellation is not required. Instead, on the scheduling site, find the appointment in Confirmed Requests, put in the new time AND document in Description of Visit that the time of the original appointment has been changed. **If a patient appointment is rescheduled to a different day, a cancellation must be submitted via the CHPS request site and a new request must be made.**
17. On the day prior to the CHPS visit, the clinical study team (CST) ensures nursing worksheet is accurate and complete. Place the worksheet in appropriate folder on CHPS unit prior to visit when applicable (if CST does not supply for CHPS staff at the visit). When appropriate the CST needs to ensure research tubes are delivered to CHPS **and to communicate any specific information with the Charge nurse.**

Addendum: Creation of MRN for participants without a Penn MRN- please visit CHPS website to download the form
https://www.med.upenn.edu/chps/research-nursing-core-rnc.html > Nursing Tools

Supersedes: Scheduling Subjects for CHPS Visits, 03/2018, 11/01/2018, 11/21/2021

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