I. **Purpose:** This Standard Operating Procedure (SOP) describes activities and identifies individuals responsible for the scheduling of inpatient admissions and outpatient study visits at the CTRC. This SOP assures room, resource and staff availability and facilitates fair access to CTRC resources.

II. **Scope and Applicability:** This SOP outlines procedures for investigators and research coordinators (study staff) who conduct studies on the CTRC requiring:

- At least one overnight inpatient admission to the CTRC Hospital Location using inpatient rooms, nutrition services, specialized equipment and staff expertise. Subjects are considered inpatients if their visit extends beyond midnight of the day of admission and is pre-scheduled by going online to https://cctrc.med.unc.edu/patient_scheduler/manageRequests/managerequests.cfm
- Outpatient rooms, the use of specialized equipment, and/or nursing services. Scheduling patient visits in advance using the designated online scheduling system (see link above) is essential to smooth study and CTRC flow for the many users of CTRC services.

III. **Responsible Parties:** Study staff of CTRC-approved research studies and CTRC staff who review and confirm subject appointments (nursing, administrative, bionutrition)

IV. **Procedure:**

A. **All scheduling requests should be made on the website listed above.** Any cancellations, changes, special requests can be emailed to the central scheduler at ctrcscheduler@med.unc.edu or phoned in to 843-9536.

B. **Hours of Operation:** Care is provided as indicated below except Thanksgiving, Christmas, and New Year holidays when University holidays are observed. All scheduled closings are listed on the online scheduling system.

1. **Outpatient visits are scheduled for the CTRC as follows:**
   a. **CTRC Hospital**
      - **Monday - Thursday:** 7:30 am - 4:30 pm
      - **Friday:** 7:30 am – 12 Noon
      - **Saturday:** 8 am - 12 pm on the 2nd and 4th weekends of the month
   b. **Burnett Womack**
      - **Monday - Thursday:** 7:30 am - 12 pm; from 12 - 4:30 pm by appointment
      - **Friday:** Closed

2. **Regular inpatient care is available as follows:**
a. Mondays – Thursdays 24 hours with scheduled admissions require a minimum 7 day advanced notice (urgent requests can be emailed to ctrcscheduler@med.unc.edu and will be granted based on room and resource availability)

b. Fridays – Sundays on Second and Fourth Weekends; will flex to open for four patients on other weekends with a week’s notice

C. Scheduling Guidelines: Study staff will schedule inpatient admissions at least 7 days in advance to ensure room and resource availability. In addition, study staff notifies Bionutrition core of admissions requiring research diets, special dietary requirements, or other Bionutrition core resources as described below. Scheduling requests with less than 48 hours notice or same day admissions go through the CTRC central scheduler at ctrcscheduler@med.unc.edu. CTRC will try to accommodate scheduling requests made less than 48 hours notice, but scheduled patients have priority and these requests are not guaranteed; provided on an ‘as available’ basis. For urgent or last minute requests, call 919-843-9536 or page 919-216-6991 (after 5 pm Monday – Friday and on weekends).

   1. After confirmation from the central scheduler, study staff are responsible for entering the subject schedule data into the online scheduling system.

   2. On the day of admission, the patient is scheduled for an inpatient room based on procedure, patient needs, and resource requirements.

      a. NOTE: All of the inpatient rooms are private and one family member is allowed to stay with the patient overnight unless otherwise indicated in the study protocol.

   3. Studies that require nutrition resources (including research diets, body composition procedures, or Research Dietitian visits) are scheduled in advance with the Bionutrition Core by emailing gcrc-diet@med.unc.edu or by calling the Metabolic Lab manager at 966-4747. Outpatient snacks and regular meals only may be scheduled through the online scheduling system and entered in the special instructions section. All requests are to be scheduled in advance as follows:

      a. Single inpatient research meals: 48 hours.
      b. Multiple days of inpatient research meals: 5 working days.
      c. New studies: 10 working days.

D. Procedure for web scheduling:

New coordinators (anyone who has never used the CTRC for their research subjects’ visits) are required to attend a CTRC orientation session with a nurse team leader prior to receiving access to scheduling patients. This one hour CTRC’s Initial CRC training class is held the third Thursday of each month. New coordinators must also complete the on-line training modules (See Coordinator Training SOP). The study team will receive the needed
password and sign-on to use at the end of their orientation in order to schedule patient admissions online.

1. The online scheduling system can be accessed via weblink: http://ctrc.med.unc.edu/patient_scheduler

2. The following patient information is required at the time of scheduling:
   a. First and last name
   b. Accurate Medical Record Number (MR#)
   c. CTRC/IRB Study Number
   d. Date of birth and gender
   e. Name, email address, contact phone and pager of study staff who will conduct the visit.
   f. Admission date, estimated check-in time, and discharge date and time.
   g. Procedures needed (i.e. – infusion, medlock, PK, liver biopsy, etc)

3. Special Instructions section in the online scheduling system can be used to give CTRC staff specific details needed to carry out study procedures and to ensure resources are available. Examples include name of IV study drug, length of PK sampling, orthostatic or multiple vital signs, height required, POC pregnancy test, liver biopsy, lumbar puncture, and specific room required.

E. Outpatient Visits:

1. Study staff are requested to schedule outpatient appointments at least 48 hours in advance.

2. Visits lasting less than 2 hours are automatically scheduled in the system. Visits lasting more than 2 hours will be reviewed and approved by the nursing team leader when alerted by the central scheduler. These visits are scheduled in the system after approval and a confirmation email will be sent to the email address provided in the appointment request.

F. Inpatient Admissions:

1. After scheduling and before admission, the coordinator/investigator will instruct patients to stop at the admitting office on the ground floor of their admission day prior to coming directly to the research unit. If patients arrive for admissions after 5pm, they should be instructed to go to the registration department located on the ground floor of the Women’s’ Hospital prior to coming to the CTRC Hospital Location for registration.
2. The coordinator or principal investigator must provide physician orders and flow sheet prior to the patient’s arrival on the day of admission to the inpatient ward clerk.

3. Upon arrival to the floor, the patient will provide the inpatient ward clerk with the preprinted patient labels and paperwork received in admitting.

4. The coordinator and/or principal investigator will be paged by the inpatient ward clerk or inpatient charge nurse as soon as the patient arrives to the unit.

5. The inpatient ward clerk will transcribe the orders which will be checked by the patient’s nurse. The coordinator is responsible for providing kit labs, needed labeled PK tubes, and labeled take—off or aliquot tubes.

6. It is the responsibility of the coordinator to provide written specimen processing instructions either in the physician orders or on the time and event schedule.

G. **Cancellations.** Study staff may cancel their scheduled inpatient admissions by calling the central scheduler (843-9536 or ctrcscheduler@med.unc.edu) as soon as it is known that the patient will not be admitted. Bionutrition core cancellations should be sent to gcrc-diet@med.unc.edu or to the Metabolic Kitchen at 966-4747.

H. **Late Requests.** Scheduling requests made after 4:00 pm for the next business day may not be received until the next day depending on unit flextime. For these requests, please email ctrcscheduler@med.unc.edu or call the central scheduler at 843-9536. It is recommended that coordinators contact the hospital outpatient clinic at 966-1437 or the Burnett-Womack clinic at 966-1404 after 7:30 am the morning of the outpatient visit. If an inpatient needs to be admitted or for an outpatient visit involving multiple PK’s or drug infusion for the next day, please contact the nursing team leader by paging 216-6991 or call 966-4744 to ensure resource availability.

I. **Getting study approved/services approval:** New inpatient protocols will require review of physician orders and unit approved flow sheet per nurse manager or appointed charge nurse prior to inpatient admission. The study team needs to meet with the nutrition manager for any protocol requiring research diets.

1. If needed, a staff inservice will be scheduled prior to study initiation by the nursing team leader or nutrition manager. The purpose of this staff training is to review aim and background of the study, explain data and specimen collection, define any special patient care requirements and to review required paperwork.

2. The flow sheet referred to as time and event schedule and the physician order template can be found on the CTRC website at http://tracs.unc.edu/ctrac, then click on UNC Hospitals Clinic, under investigator scroll down to nursing and click to open.