Booking on Calpendo

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This startup guide is a brief introduction to the most important information to begin using Calpendo to book the ACH 3T MRI.

A more detailed user guide is here:
http://docs.exprodo.com/calpendo/index.html?cal_calpendo_user_guide.htm

The website for using Calpendo is: https://sfc-calgary.calpendo.com/

First Login and Setup

At the initial login screen enter the username and password that you were provided.

The username and password are case sensitive.
If you are not able to login, the most likely explanation is that you do not yet have an account.
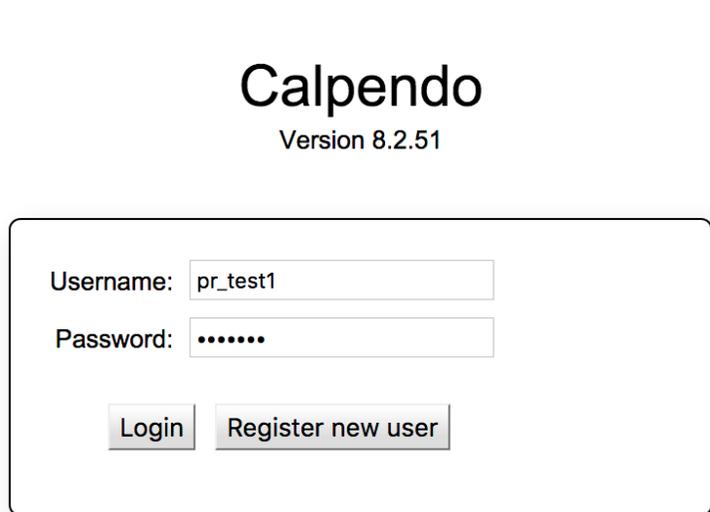
After logging in for the first time you will be asked to change your password.

Change Password ✖
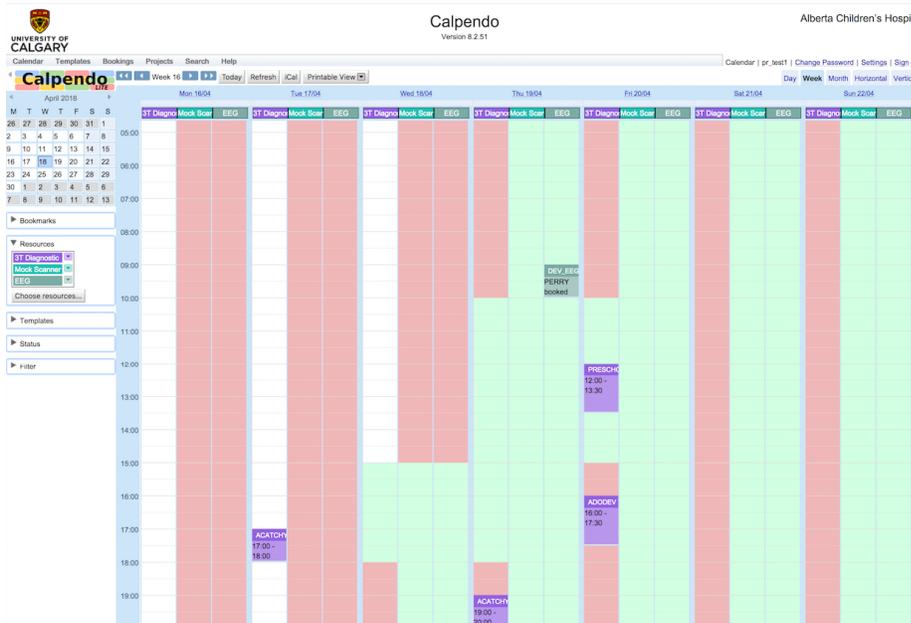
Your password has expired and must be reset. Please enter your old password and a new one.

Old password [   ]

New password [   ]

Repeat new password [   ]

[Apply]

By default you will see a Week view as shown below.

The red or white cells indicate times you are not able to book, either because they are in the past, or off-hours (no technologist available).
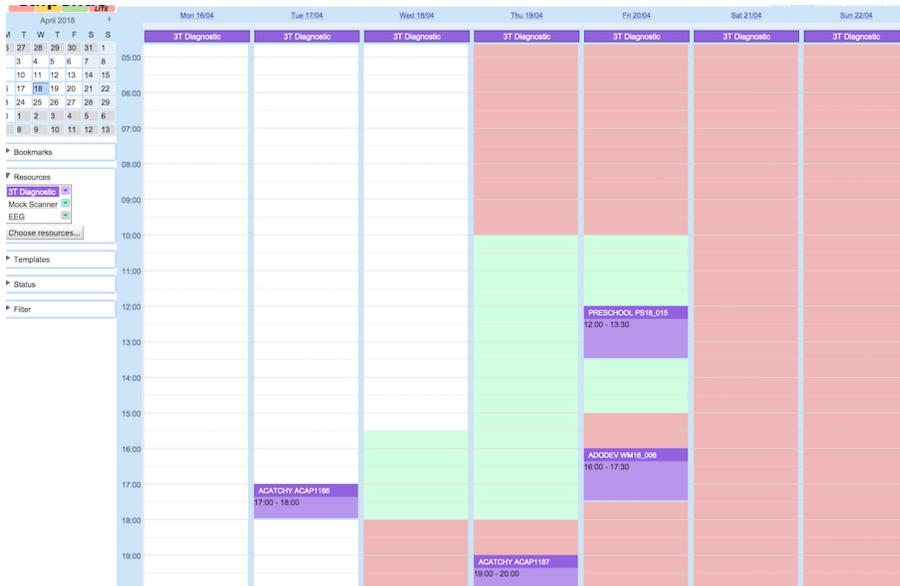Clerks, level 2 operators and MRI managers are able to book the MR during off-hours.

Each day shows a column for each of the 3 Resources: 3T Diagnostic (scanner), Mock Scanner and EEG

If you are not interested in seeing the Mock or EEG calendars you are able to hide them by clicking on their titles in the left-hand panel.
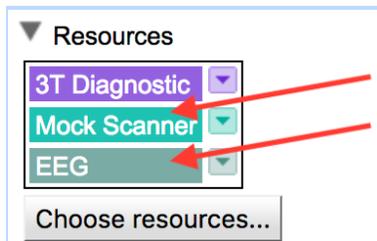
And the resultant view after these are hidden:

Booking

IMPORTANT

Currently we are asking Bookers to check with Joanne Houghton if they must create, edit or cancel a booking that occurs within 4 hours on the same day. (Ph: 403 955 7987 option 4). This is intended to minimize confusion between clinical and research users.

Having logged into Calpendo, click on the appropriate box and column for the desired date and time.
E.g. For a scanner booking on 10 to 11:15am, Apr. 19, click on a time box under the column for 3T Diagnostic under Apr. 19. and the row for 10am. If it is a future week, you could modify the date time as shown in the form.

The "New Booking" form will be shown:

First check that the **Resource** is correct. For MR bookings you should see 3T Diagnostic as the Resource, otherwise change to it by clicking on the Resource Box:

Select the **Study Name** (Project) which should be listed in the dropdown menu. Note that this menu is populated specifically according to the access provided to your user account.

Check that your dates, start time and end times are correct in the **From** and **To** fields. By default it is an hour booking but it can be adjusted in 15 minute increments.

Check the **Send reminder email** box if you want an email reminding you of your upcoming scan.

Note that by clicking on the box Notice Period, you can change the amount of time preceding the scan that the notice email will be sent to you. Under "Send reminders to" are those who will receive the email notifications as defined by the booking form (Booker and Operator) or the Project definition (Owner, Study Coordinator, Users).

The field **Status** is required by the program and should **not** be touched: "Best possible". The **Booker** is automatically set to the name of the account logged into Calpendo. The **Owner** is automatically set as the main contact for the Study that was selected, and the effect is that this person could receive a reminder email (if checked in the Reminder section).

The **Subject ID** is the identifier code used by the study coordinator to identify the participant, and will be the Exam ID entered on the MRI console computer. The Project and the Subject ID identify the events in the weekly calendar view. e.g. TEST053

Status	Best possible
Booker	PR TEST1
Owner	perry.radau1 (Perry Radau)
Subject ID	TEST053

The **Operator** is selected by dropdown and is the intended MRI scan operator that the Booker selects.

If you require a clinical tech for scanning then you should select ACH.3TMRBooking (Clinical Tech). It is important that you check the MRI tech schedule to see if a tech is available to scan during the time you have made the booking. You can view the MRI tech schedule here: https://cumming.ucalgary.ca/research/child-adolescent-imaging/information-researchers/mri-scheduler

IMPORTANT: Please see the section below **"No Technologist Available"** for information about short-term notices where no tech staff are available.

If you are selecting a Level 2 operator (not a tech) then you must indicate accurately here the name of that operator. It is the Booker's responsibility to ensure that this Operator has agreed and is available for the scan. The only people approved as Level 2 operators at ACH are listed in this drop-down menu.

Reminder	ACH.3TMRBooking (Clinical Tech)
	Helen.Carlson (Helen Carlson)
	Marc.Lebel (Marc Lebel)
	aewebber (Amy Webber)
	ashley.harris2 (Ashley Harris)
	blgeerae (Bryce Geeraert)
	clebel (Catherine Lebel)
Status	goodyear (Brad Goodyear)
Booker	heidi.obrien1 (Heidi O'Brien)
Owner	kjsabour (Kristin Sabourin)
Subject ID	martin.sherriff (Martin Sherriff)
	perry.radau1 (Perry Radau)
	pr_test2 (PR TEST2)
	preeti.kar (Preeti Kar)
Comments	slbray (Signe Bray)
	Please select a Operator
Operator	

The **Comments** field allows free text.
IMPORTANT: The text must **not contain any confidential Personal Health Identifiers** such as participant name, date of birth or health care numbers.
It can contain optional text but if you are booking a scan that does not require a technologist it is **REQUIRED** that the first line read:
NO TECH REQUIRED as shown in the example screenshot below.

It is also strongly recommended that this is appended to the Subject ID so that it will appear in the title of the booking. e.g. In this example the Subject ID becomes "TEST053 NO TECH REQUIRED"
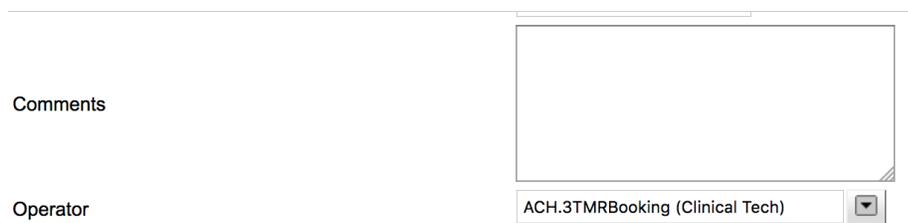

In the more common case where a tech is required the form would appear as:
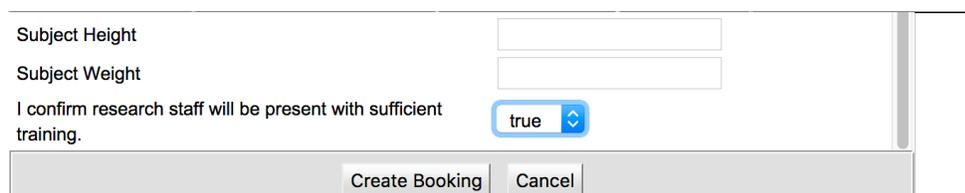

This is currently necessary so that the daily schedule clearly indicates where techs are needed and where they are not, as the Operator is not shown on that schedule.
If this is not written it is the default assumption that the Booker expects a tech to be present during scheduled tech hours.

Height, and **Weight** are optional.

Set the **"I confirm research staff will be present with sufficient training"** field correctly. This means that the research staff will have minimum level 1 training. If the Operator is not a tech, then there must be two researchers present and the operator is Level 2.

Without confirming this as "true" the booking cannot be made.


Finally, press the **Create Booking** button at the bottom to ensure that this information is saved and the calendar is updated.

When you return to the calendar view you should see your new booking immediately, in the correct row (time) and column (date).

If it isn't visible, press the Refresh button in the toolbar at the top of the calendar. Below is an example for the booking described above. Note that the title bar shows Study SubjectID and the next line shows the comment we entered in the Comment field that indicates a technologist will not be needed for the MR scan.
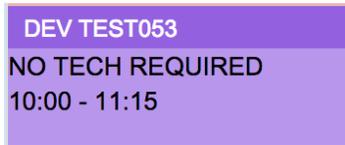
Below is another example, where the Study is "PRESCHOOL" and the Subject is "PS18_015" and a tech is required:
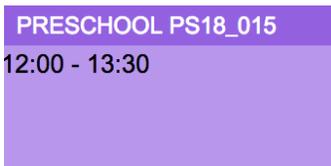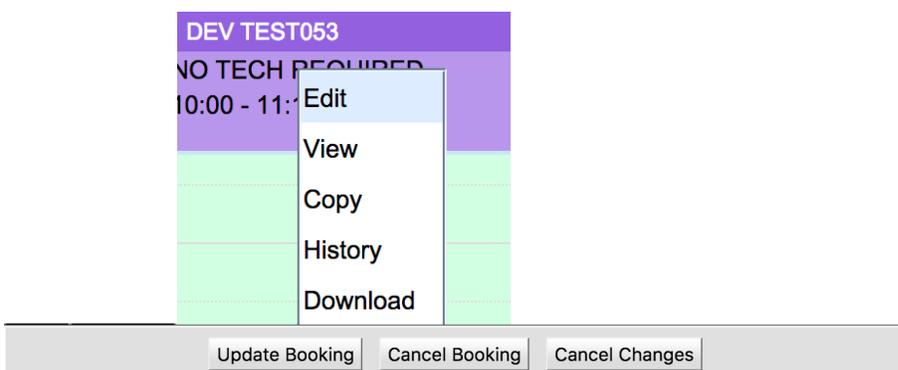

Editing a Booking

If the Booker determines that they need to edit one of their bookings they should click on the booking in the calendar, select Edit
and then modify in the Booking form. Then select the Update Booking button.
If you are not able to edit a booking this likely means that someone else from your group booked it and you may need to ask them to make the edit, or else contact Perry to setup a MRI manager for your group who would make such changes.

Editing a booking for the same day has special rules (see "Short Notice New Bookings or Booking Changes" below).

Cancelling a Booking

Similarly, the Booker can cancel a booking by selecting the booking in the calendar, and then the Cancel Booking button at the bottom of the form.
The user is asked to choose a reason from the dropdown before completing this request.

No Technologist Available

There are rare occasions where the technologist is NOT available despite the time period falling within the normally scheduled technologist hours, e.g. due to sickness, emergencies, etc. Wherever possible the time template will be updated to reflect the technologist hours and the clerks will notify researchers with previously scheduled bookings within the periods that are now available for scanning **only** with a Level 2 operator. But this may be difficult or impossible in some cases. Therefore, the clerks/technologists will also attempt to notify the researchers broadly by placing a special booking on the calendar with Study (Project) code "NO_TECH". This special booking can overlap with existing bookings so that they need not be cancelled without notice.
IMPORTANT: We require all researchers to check their bookings in the lead-up period (e.g. next 5 business days) to determine if it overlaps with a NO_TECH booking. If it does, they should attempt to either find a level 2 operator replacement or cancel their booking. Otherwise you might schedule a scan stating that it requires a tech and then arrive at the scanner to find that none is available.

The example image below shows how this might appear in the calendar with a NO_TECH booking overlapping a previously scheduled PRESCHOOL booking.

Short Notice New Booking or Booking Changes

We have adopted a requirement of a minimum advance notice period of 4 hours for same day new Calpendo bookings, or editing the date/times of pre-existing bookings from research staff.
Nevertheless, a researcher **may** be able to book a slot at **shorter notice** if it is discussed directly with Joanne and she agrees. (Ph:403 955 7987 option 4.)

Booking Sheets

For research scans we need to replace the information that was previously on the Millennium booking sheet that was attached to the screening and consent forms at end of the scan. The replacement will be:

- Calpendo is available on both Windows computers in the control room to look at the live schedule to obtain the Subject ID and the date/time.
- the **operators should write the time and date and Subject ID at the top of both screening and consent forms** so that tracing the study, subject id, etc. could be achieved by looking up that booking in Calpendo.