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Revision History:	Version	Effective Date	Description

Purpose

This SOP outlines the procedures for booking and managing exam room reservations at the CH20 Research Clinic using the REDCap system.

References

- N/A

Scope

This SOP applies to all staff members at the CH20 Research Clinic who are responsible for scheduling and managing room bookings.

Allowable Exceptions

This SOP is meant to be followed without deviation.

I.   Procedures:

1. Log in to REDCap:
   - Navigate to the UAB REDCap link/portal and log in with your credentials.
2. Navigate to Your Project:
   - From the main dashboard, select the "CH20 Research Clinic" project.
3. Access the Report Tool:
   - Use the "Add/Edit Records" or "Record Status Dashboard" option in the left-hand navigation menu to manage bookings.
4. Create a New Record:
   - Click on the green "+ Add New Record" button.
   - **MUST** fill in all required fields:

o Appointment date, time, and duration
o Room selection (exam, huddle, ambulatory room, or monitor room)
o Study Coordinator's name and contact information
o Study title
o Principal Investigator
o Participant's name and contact number

- Mark the Form Status as "Complete" once all information is entered.
- Save the record by clicking "Save and Exit Form".

II.   Managing Changes and Cancellations:

1. Updating Room Bookings:
   - If a visit is canceled or rescheduled, update the report promptly. Open the record for editing and mark the visit as canceled then save and exit form.
   - This step is crucial for maintaining accurate records of clinic utilization and preventing scheduling conflicts.

2. Communicate Changes:
   - Communicate any scheduling changes to all relevant parties, including clinic staff and study team, to adjust clinic usage accordingly.

3. **No Availability:**
   - If no rooms are available, first attempt to resolve by contacting other Coordinators using the phone numbers listed in the bookings.
   - If resolution is not possible, contact the Clinic Manager for further assistance.
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1/18/23