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.

f. COVID Screening
   i. Please ask the participant these questions prior to submitting the request. These responses are recorded in PennChart.
g. Services
   i. Please select all services that are needed for the visit. These are organized by nursing, bionutrition services, testing, functional testing, accelerometry, polar HR monitoring, intervention, and other services.

h. Summary
   i. Review all information entered in the request and click ‘Send Request’.
5. The requester will not receive an email upon request submission. The next email the requester receives will be:
   a. Request approved
      i. This email will confirm that the visit was approved. Please locate bold text in the email for any approval stipulations.

Your request for an appointment has been approved.

Request ID: 94536
CHPS ID: 3205
Location: Presby
Appointment Date: 06/07/21 5:10 PM
Approval Stipulations: Please bring consent to CHPS visit

See the details of your request here: https://staging2.med.upenn.edu/apps/itmat/css/requests/94536.

DO NOT REPLY TO THIS EMAIL.

b. Appointment modifications requested
   i. This email will include instructions for modifying the request. Reasons for modification requests may include but are not limited to: CHPS staff suggesting
an alternate visit time or room, incorrect CHPS ID attached to request.

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**c. Request denied**

i. 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.

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**d. Request canceled**

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

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6. **Utilizing Features on the Dashboard**

a. Quick filter buttons are available to see ‘All Pending Requests’ and ‘Today’s Confirmed Requests’.

b. 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.

![Location filter example]

```
Location
- Dulles 1
- Dulles 1 (CHPS Hybrid)
- Dulles 1 (CHPS Inpatient)
- Dulles 1 Exam Room (Outpatient)
```

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.

```
<table>
<thead>
<tr>
<th>Appointment Date</th>
<th>Date requested</th>
<th>Actions</th>
<th>View</th>
</tr>
</thead>
<tbody>
<tr>
<td>05/11/21 2:40 PM</td>
<td>04/07/21 3:35 PM</td>
<td>Actions</td>
<td>View</td>
</tr>
</tbody>
</table>
```

```
Actions
- 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 cancelation 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.