Need help?

Email Ryan and Jamie at cvmbs-vth_stringsoftteam@colostate.edu

General Flow

1. Get access to stringsoft and get an H account number
2. Request time on the schedule
3. Get approval for requested time
4. Create an order for participant on day of visit (this is how your account will be billed)

Creating a stringsoft account and getting your account added to the system

1. **All P.I.s and research assistants** who will be scheduling time at TMI must go to this website to request an account. You will not be able to run participants without this. Please follow the instructions carefully to ensure the IT team knows that you are part of the human research group.
    a. Go to this webpage: https://vetmedbiosci.colostate.edu/technology-services/
    b. Scroll to the bottom of the page and click "How do I get access to CVMBS resources with my EID?".
    c. Click "Network Resource Request"
    d. Fill in your name, email, and eID.
    e. List "Stephens, Jaclyn" as your authorizing person even if she is not your P.I. or related to your lab. This is simply an indication to the tech team at TMI that you are part of the human research group.
    f. Check the box next to StringSoft.
    g. For Department select "TMI" from the dropdown menu.
    h. For Job Description enter your role or the closest thing to it. It does not matter if the role does not match your employment position
        1. For Student employee type select "Visiting Scientist" this designation does not really matter, it does not impact the permissions so don't worry if it does not accurately describe your relationship to TMI.
    i. Check the box next to VMware under Please select if the following additional accesses will be needed. THIS IS IMPORTANT!
    j. Check the box next to "By selecting this checkbox I acknowledge…".
    k. Click Submit Request.
    l. You will get an email letting you know you have been approved.
    m. Once you are approved you should be able to log into this website with your eID: https://cvmvwarecb1.cvmbs.colostate.edu/portal/webclient/index.html#/
1. **P.I.s, not research assistants,** need to fill out the attached H acct signature form. (the relevant form is in the second sheet)
    1. Enter your name and date at the top.
    2. Enter "A" under action to add your grant account to the list of accounts that will be billable by TMI.
    3. Enter the account numbers and name that will be charged for your scan time.
    4. For department number enter your campus code which can be found here: https://www.research.colostate.edu/osp/campus-codes/
    5. Leave H acct number blank
    6. You may need to speak to your accounting personnel to find out who the end of month invoices should be sent to.

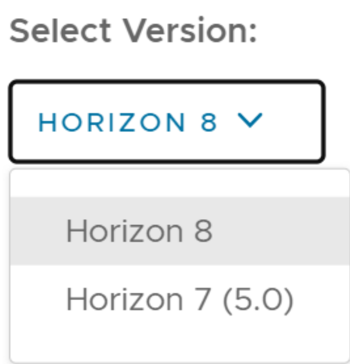
7. Email completed forms to ryan.nowell@colostate.edu and Candice.hastings@colostate.edu
8. You can ask Candice if you want the end-of-month statement to go to your P.I. or Fiscal Officer. At time of scheduling you'll be required to give your Hacct number (tied to the account listed above) and that is how StringSoft schedules and charges for the scans. The VTH/VHS billing dept will bill your accounts at the end of each month through a service billing mechanism in Kuali.

Downloading VMware

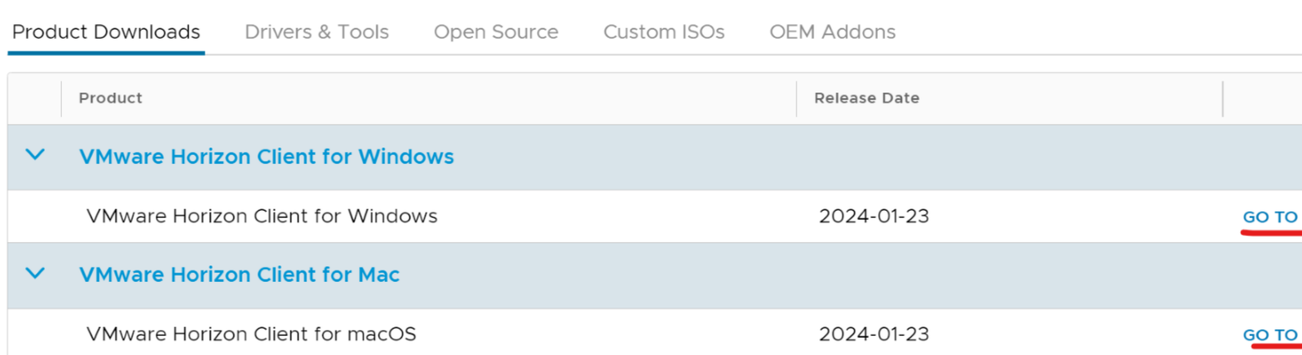
Download the newest Client:

Go to: https://customerconnect.vmware.com/en/downloads/info/slug/desktop_end_user_computing/vmware_horizon_clients/horizon_8

Select Horizon 8 from dropdown:

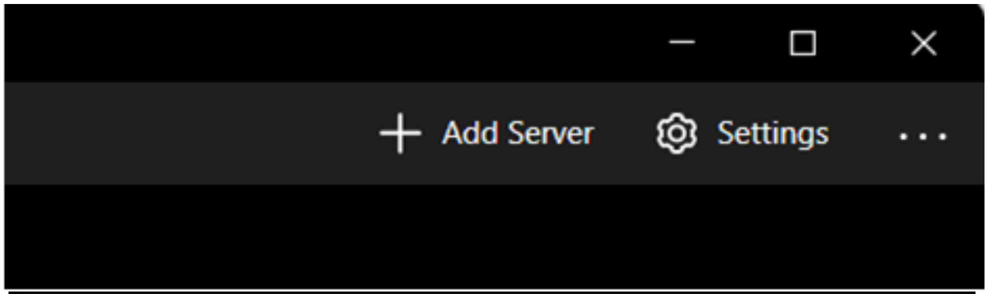


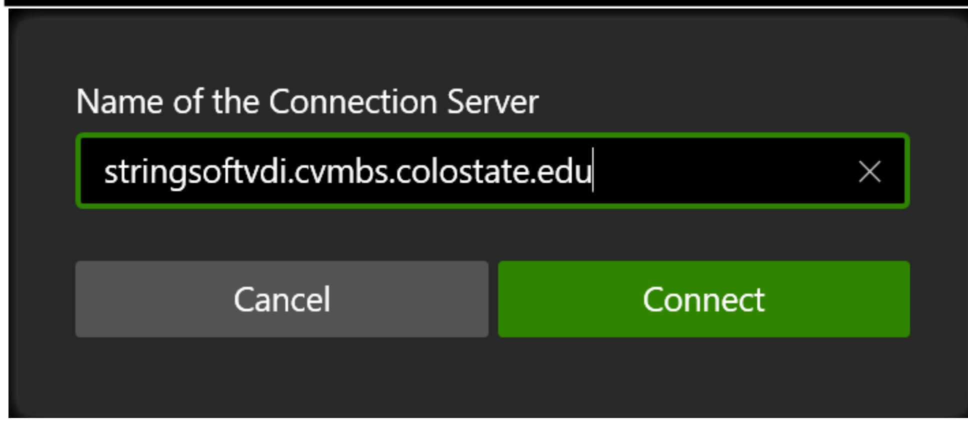
Select download based on platform (Windows. Mac, etc.):

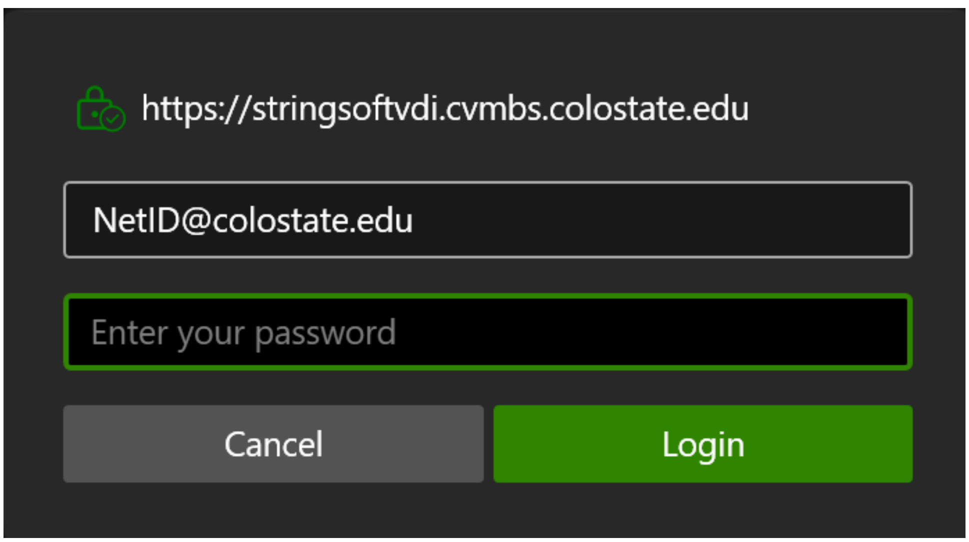


Once client is installed - Open VMware client, "Add Server" then "Connect" and enter your credentials (NetID@colostate.edu):

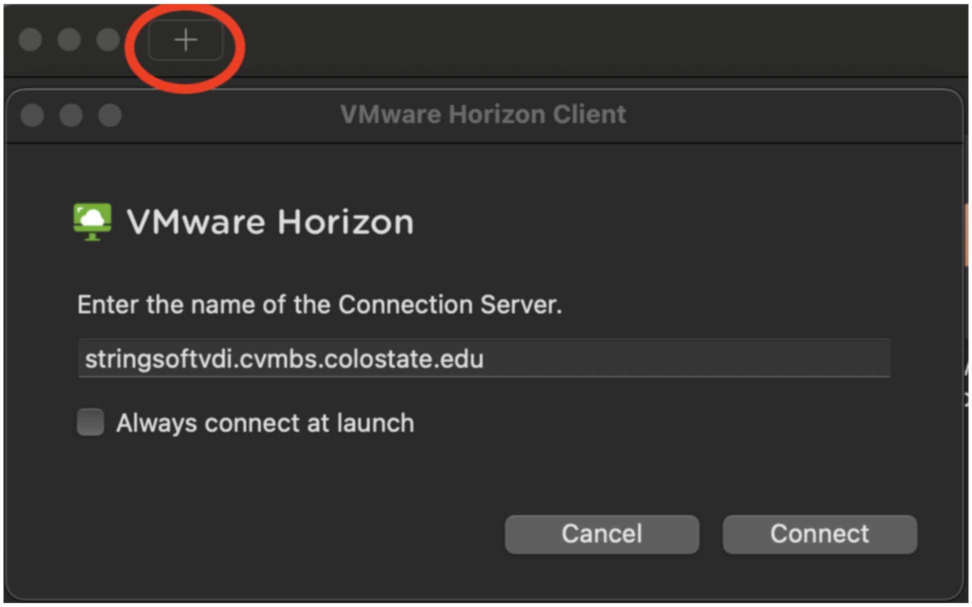
Windows:


Add Server
Settings

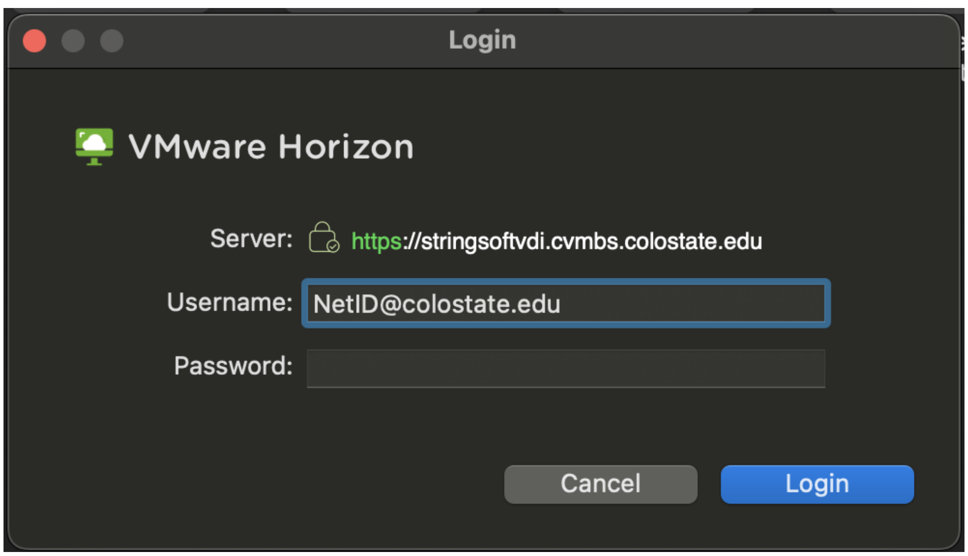

Name of the Connection Server
stringsoftvdi.cvmbs.colostate.edu
Cancel
Connect


https://stringsoftvdi.cvmbs.colostate.edu
NetID@colostate.edu
Enter your password
Cancel
Login

Mac:



stringsoftvdi.cvmbs.colostate.edu



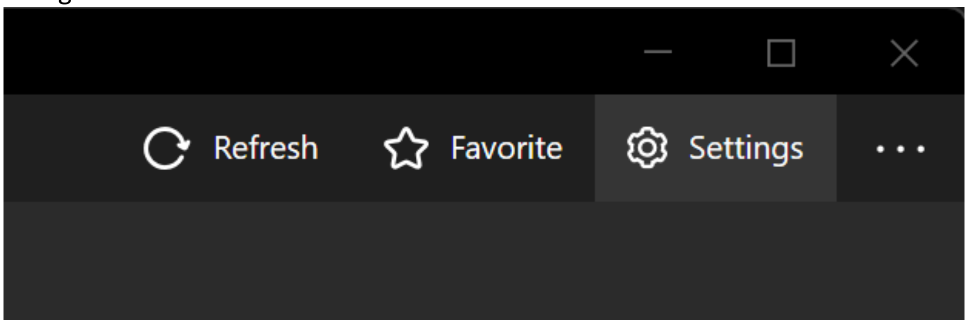
This next part is important if you want to be able to view the directions at the same time as being on stringsoft. You must do this next part and also DOWNLOAD THE INSTRUCTIONS ON YOUR DEVICE. Then, you will be able to go to the file explorer once you are connected through vmware and open the instructions there. They might take a while to open.

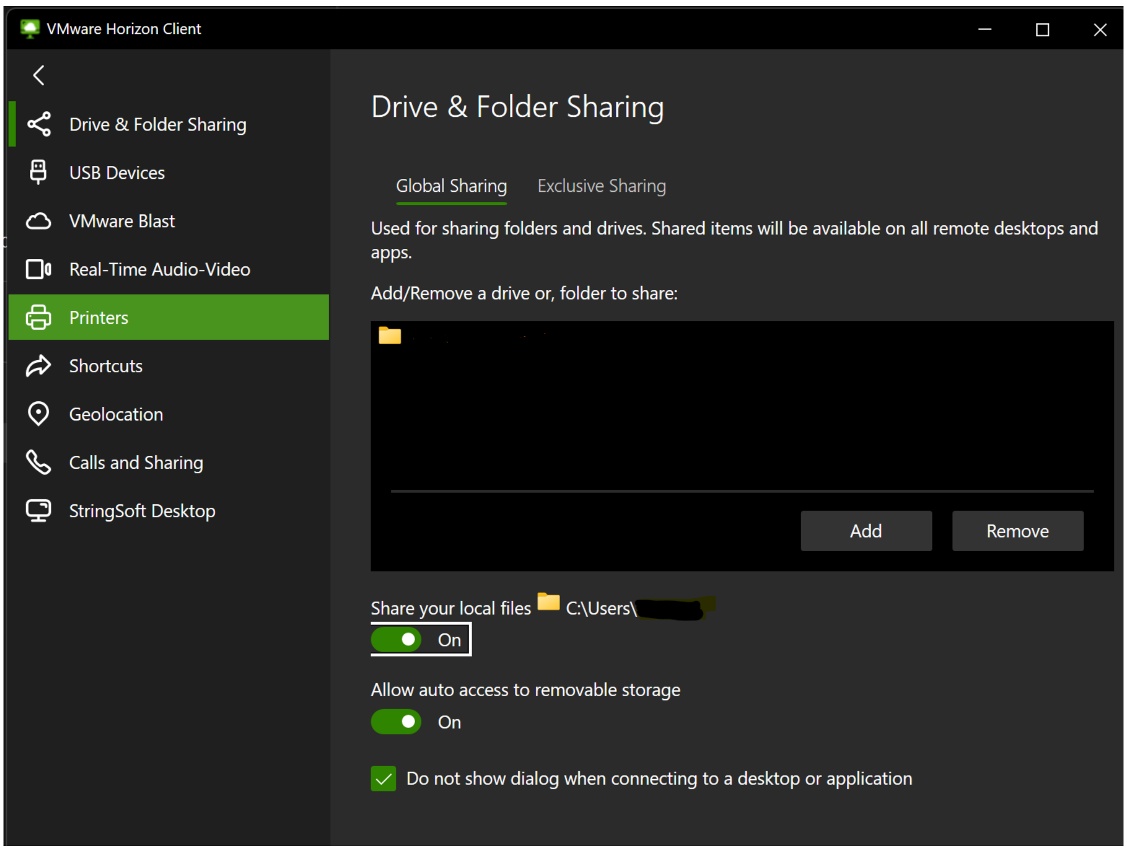
Connect to your device's local resources (folders on local computer, including OneDrive – if connected):

Windows:

Click "Settings"
Drive & Folder Sharing
Click "Add"

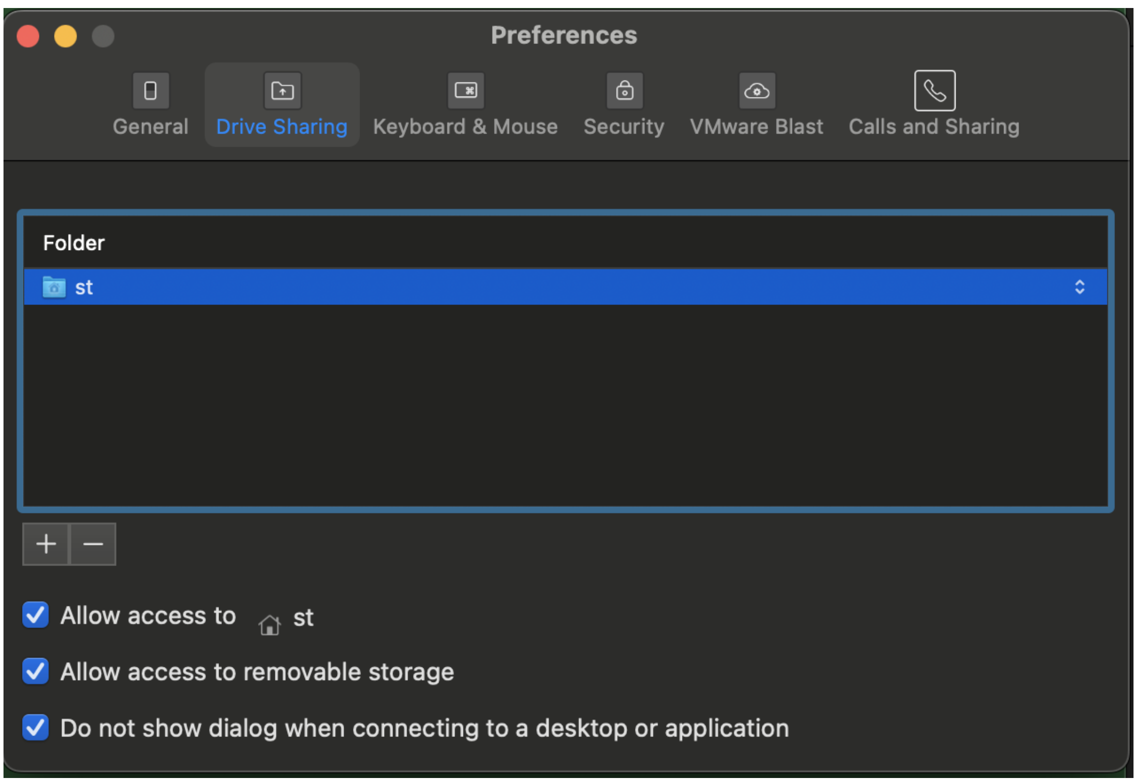
There are also options to "Share your local files" & "Allow auto access to removable storage"





Mac:

Click "Settings"
Drive Sharing
Click "+" to Add Folder
There are also options to "Allow access to" share your local files & "Allow auto access to removable storage"



Checking the Stringsoft schedule

1. Log into global protect if you are not on CSU internet

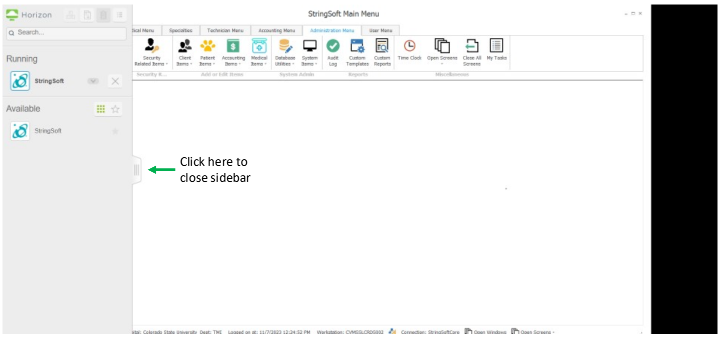
2. Open VMWare Horizon Client

3. Log in with your eID

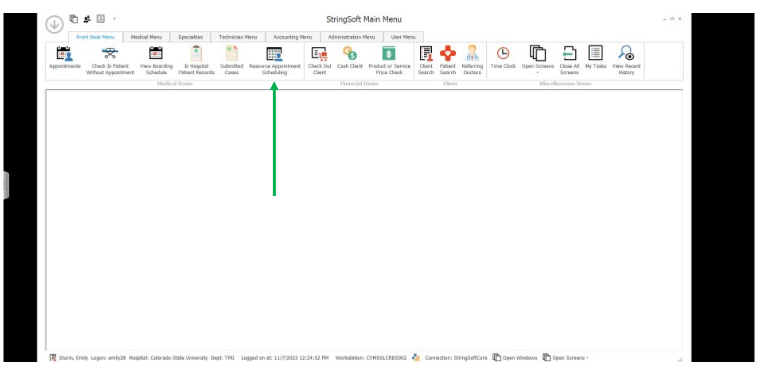
4. Click StringSoft icon

5. Log in with your eID again

6. Click 'Front Desk Menu' (you may have to close the sidebar to do this)

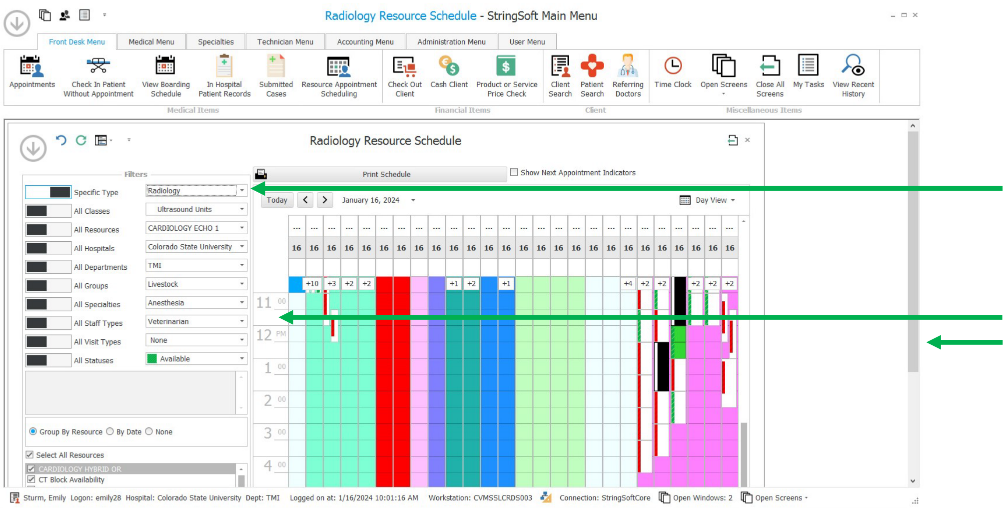


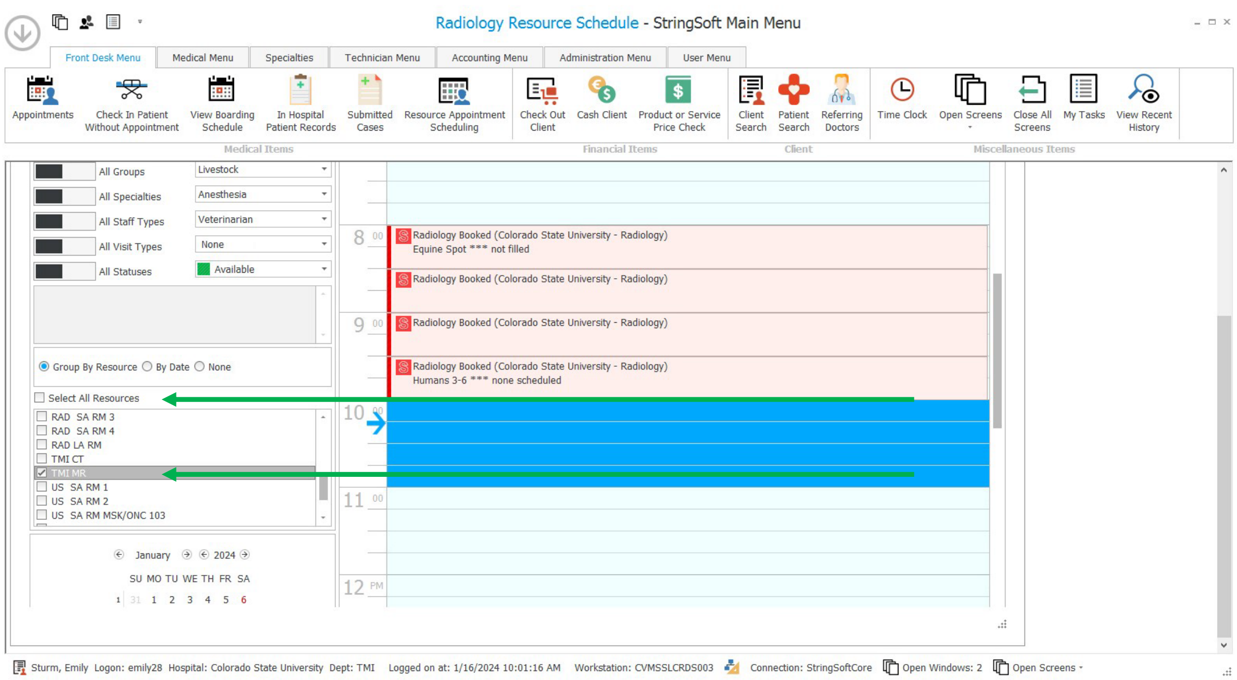
7. Click 'Resource Appointment Scheduling'



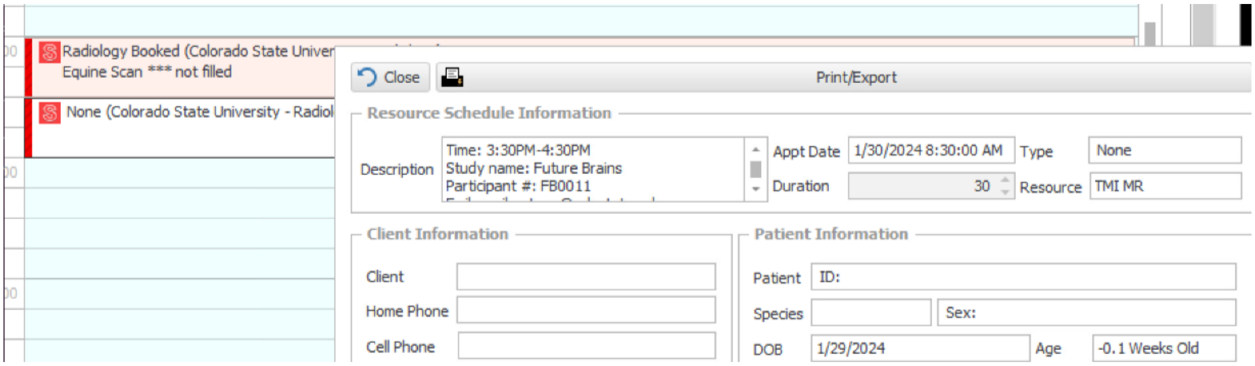
8. Check the box for 'Specific Type' and enter 'Radiology', Then, right click in the space where the hours are listed on the schedule to change the divisions on the calendar to 15 minutes or smaller. If this

division is too big you will not be able to see the description within the calendar event that will tell you what times are available. Uncheck the ‘all classes’ checkbox so all radiology options appear in the box at the bottom left. Next, you may have to use the scroll bar on the side to scroll down to see the check boxes under ‘select all resources’ (second image below). Uncheck ‘select all resources’ and check ‘TMI MR’ Now you should be able to see the note about human scans. The scan times will not appear in their actual slot but will appear together in one booking as notes about when things are scheduled.





to see the schedule you may need to hover your cursor over the block of time and see the details like this



Schedule MRI Email Template (replace all Xs with your information)

Requests must be made at least 1 week in advance and may not be approved depending on staff availability. Typical hours are M-Th, 3-6 but check stringsoft for actual availability.

Email to Nikki.Denard@colostate.edu, Erin.Ovrebo@colostate.edu, kevin.g.mcmanus@colostate.edu

Hello,

I would like to request an MRI timeslot for human research on

Date: XX/XX/XXXX

Time: XX:XXAM/PM – XX:XXAM/PM

Study name: XXXXXXX

Haccount#: XXXXXXXX

Participant #: XXXXXXX

Contact: XXXX at XXX@colostate.edu (this should include anyone who would need to know about possible changes to the visit time such as any research assistants who will be at the visit)

Thank you!

Canceling an appointment

For canceling – As soon as you know that the participant will not be able to be scanned, please email Nikki.Dennard@colostate.edu and copy Erin.Ovrebo@colostate.edu and Kevin.G.McManus@colostate.edu. Any of them have the power to cancel the order, but if it gets over looked, the account is not charged until they complete it, don't think that just because you placed an order that the funds have been automatically deducted.

Creating a participant – you must create an order for participants as soon as they are scheduled. Don't forget to use the next section to create an order BEFORE the participant arrives. You can create an order as soon as Nikki confirms your visit time.

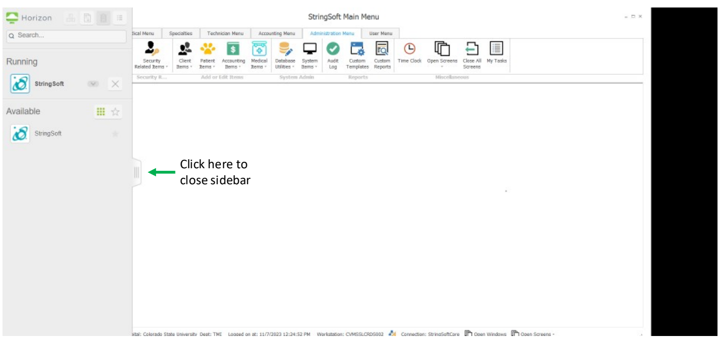
1. Log into global protect if you are not on CSU internet

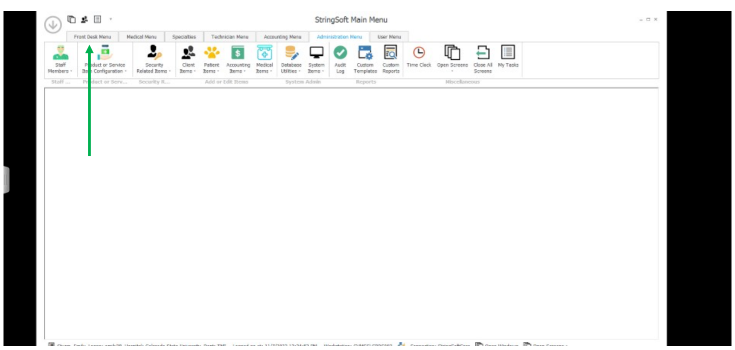
2. open vm ware client

3. Log in with your eID. It will ask you to log in twice. Use @colostate.edu the first time but not the second time.

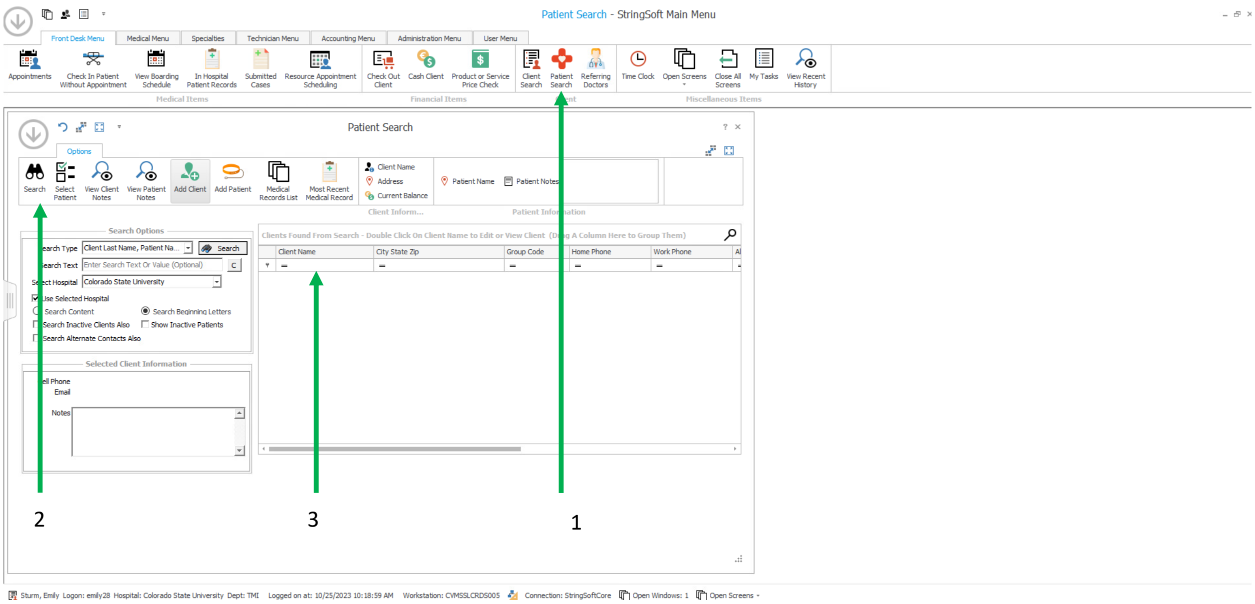
4. Click StringSoft icon (or sometimes stringsoft appears automatically)

6. Click on 'Front Desk Menu' on the top left tab. You may have to close the sidebar to do this.

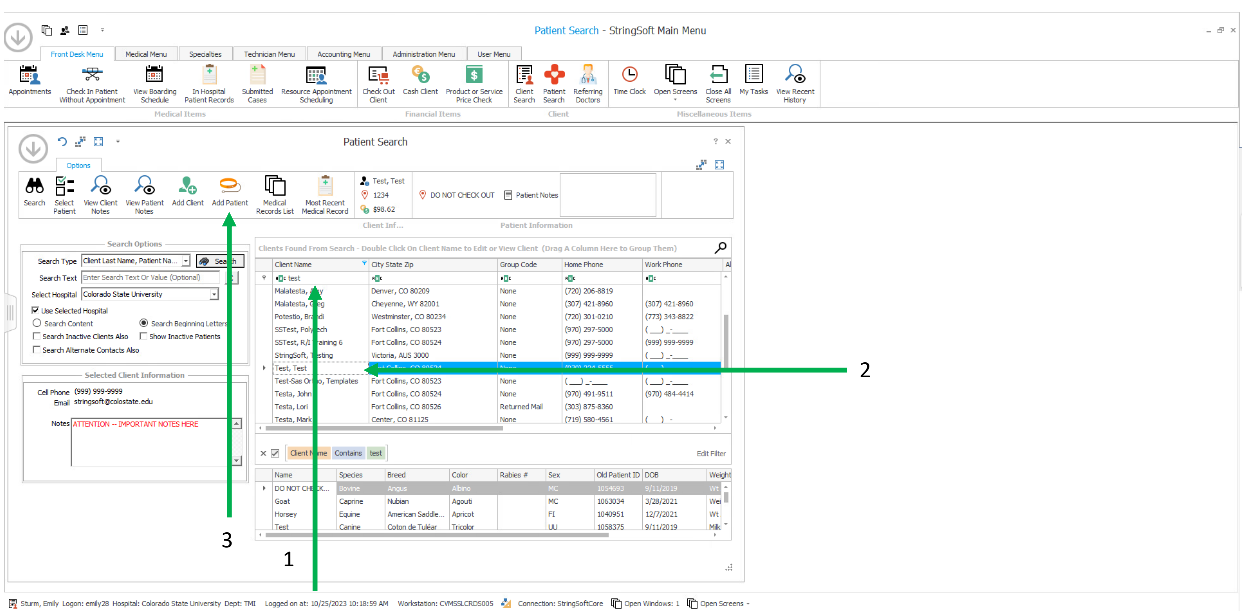


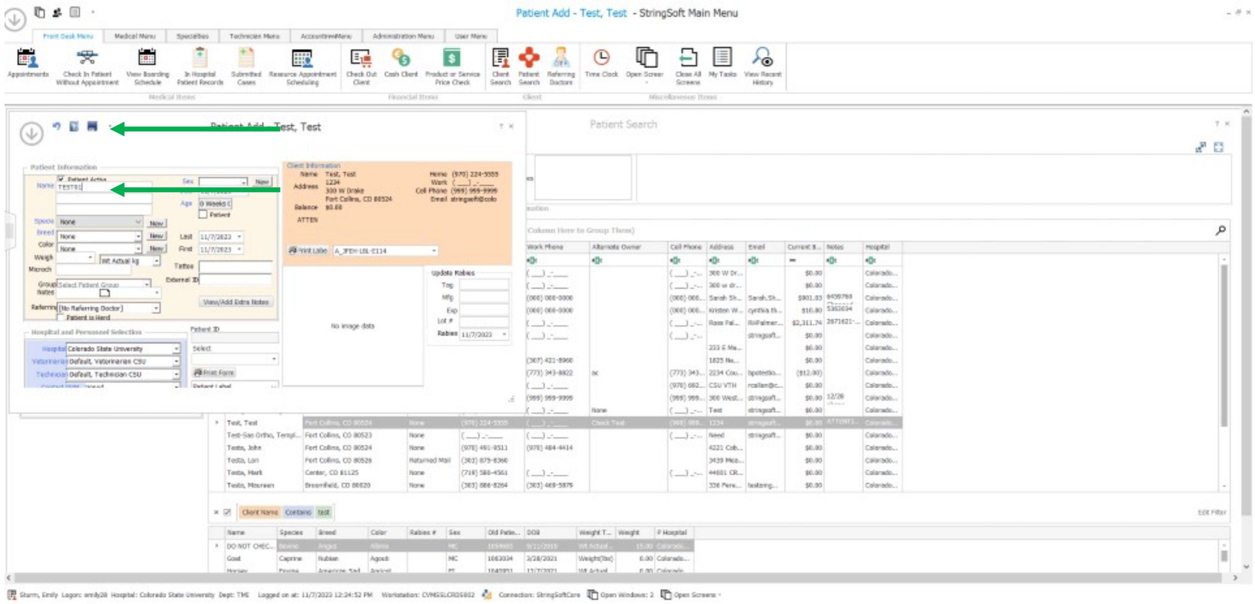


7. Open 'patient search' then click 'search' on the TOP left. You must click the icon at the very top left of the window inside stringsoft with the binoculars. Then you must type right below where it says 'client name' in the middle of the screen. Client name = Haccount number (for example H06228).



9. After typing in your haccount number under client name, click on your account and then click 'Add Patient' at the top. You only need to enter the participant number, do not enter any protected health information! If 'Add Patient' Does not show up, close the window and start over. You have to click the correct search button and search exactly like this for it to work. Click save (the little floppy disc icon at the top right of the add patient window).





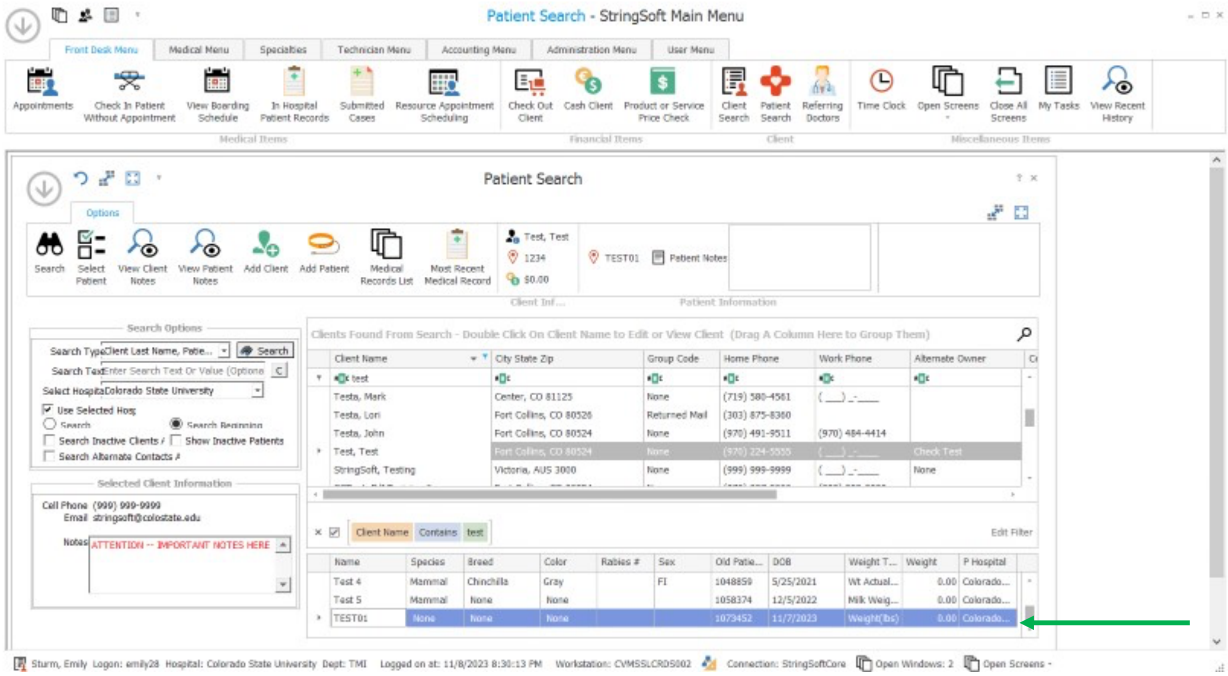
10. You can then create patients for as many participant numbers as you will have in your study. You can always add more later in this same way.

Create an order (once Nikki has confirmed your time) Make sure to do this before the visit begins but not before the month in which the visit takes place!

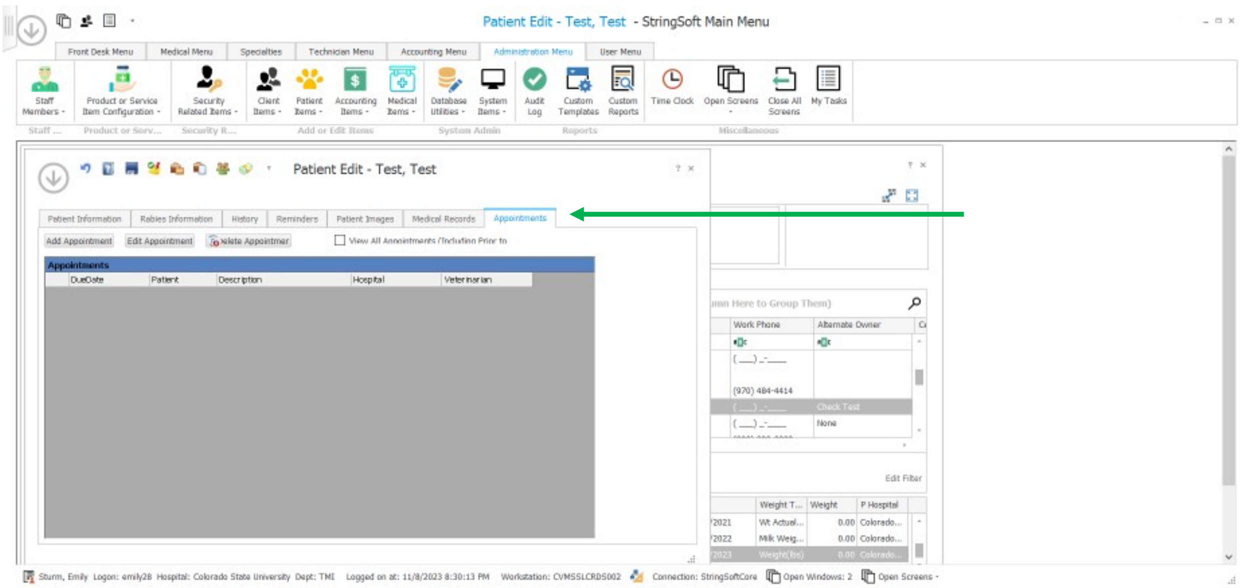
IMPORTANT – the order must be placed during the month in which the visit takes place. The invoice will be active for only 30 days so do not place orders for the 31st on the 1st of the month

1. Follow all the steps above to create a participant or follow up to step 8 to search for your h account

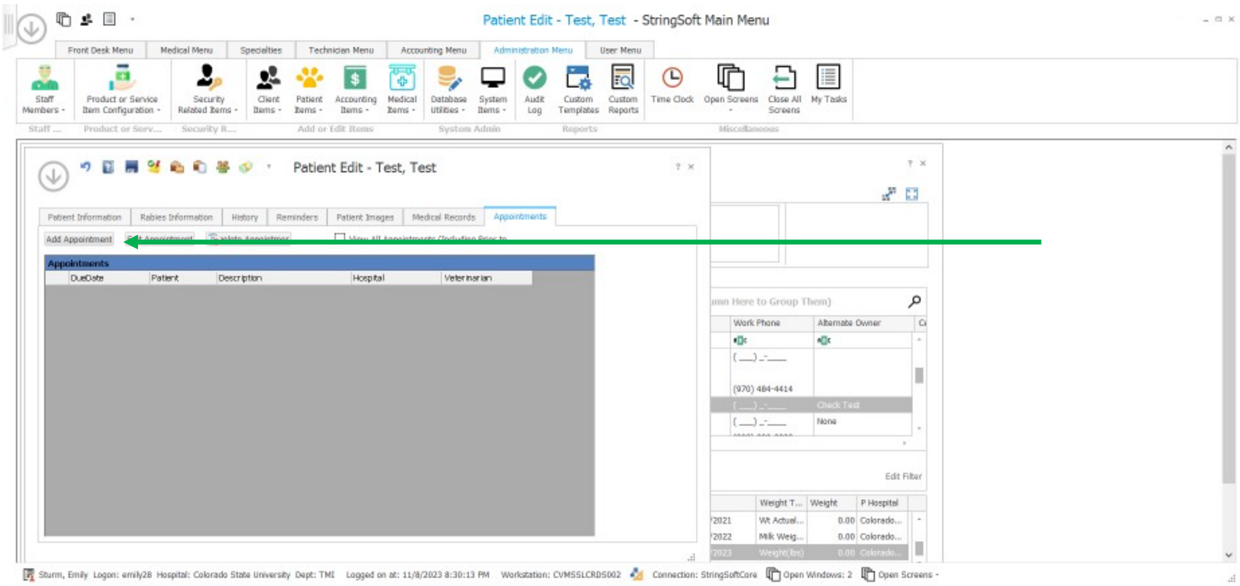
2. After clicking on your H account you will see all the participants listed near the bottom (You might have to use the scroll bar on the right to see them). Double click on the participant you would like to create an order for.



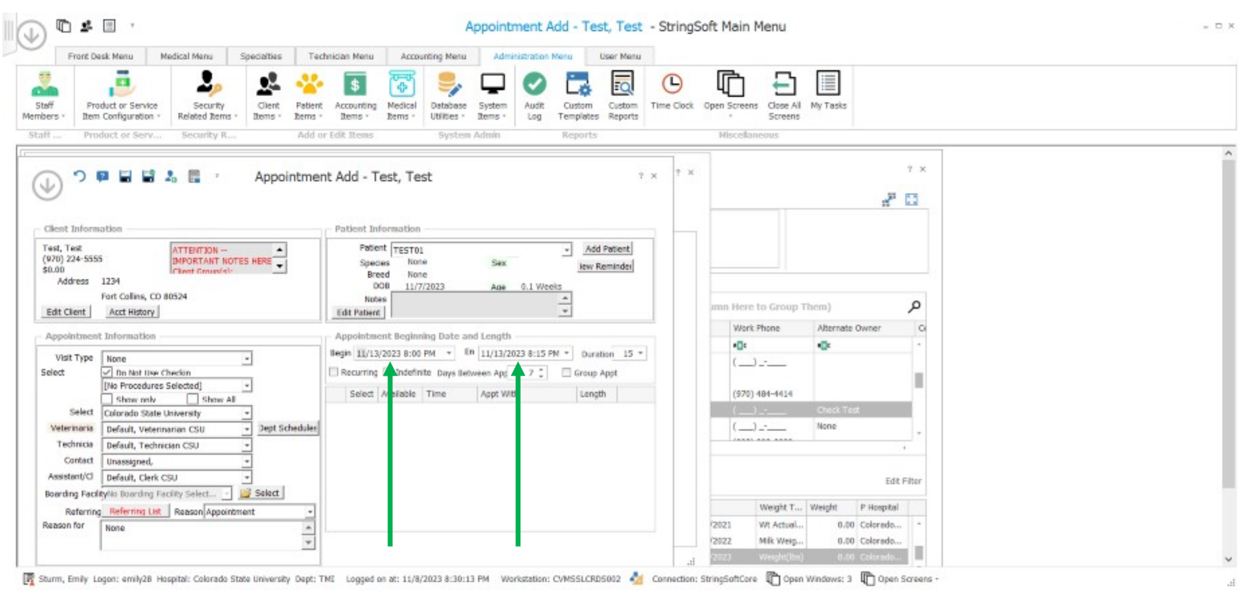
3. Click on ‘Appointments’ tab



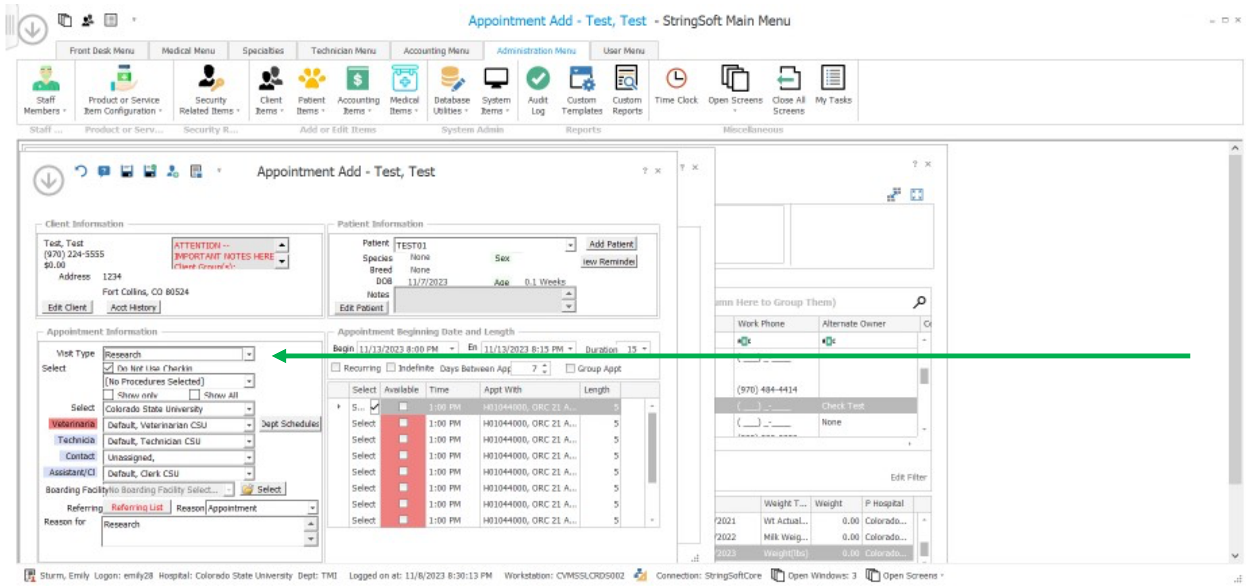
4. Click ‘Add Appointment’



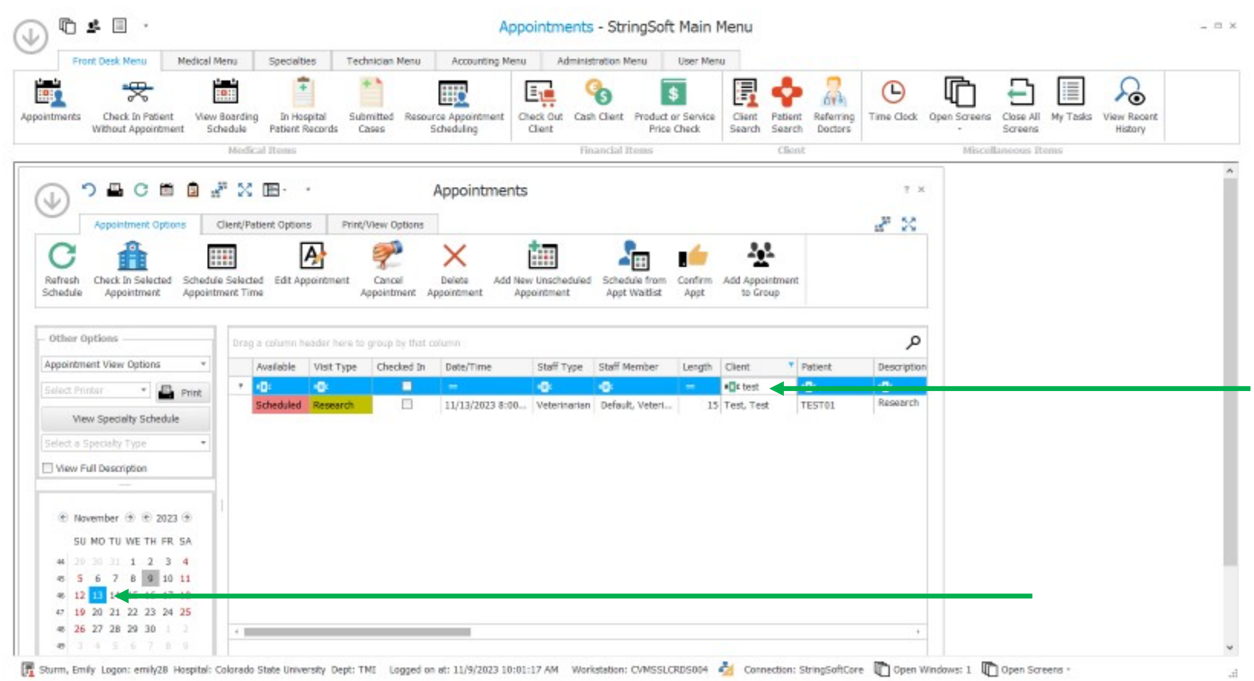
5. Fill out begin and end time to get the visit record open (remember the date you select, you will need it for the next steps) but this doesn't really matter, we can change it later. You must do this even though your time has already been approved by Nikki. This part is related to the billing not ensuring you have time scheduled on the MRI.



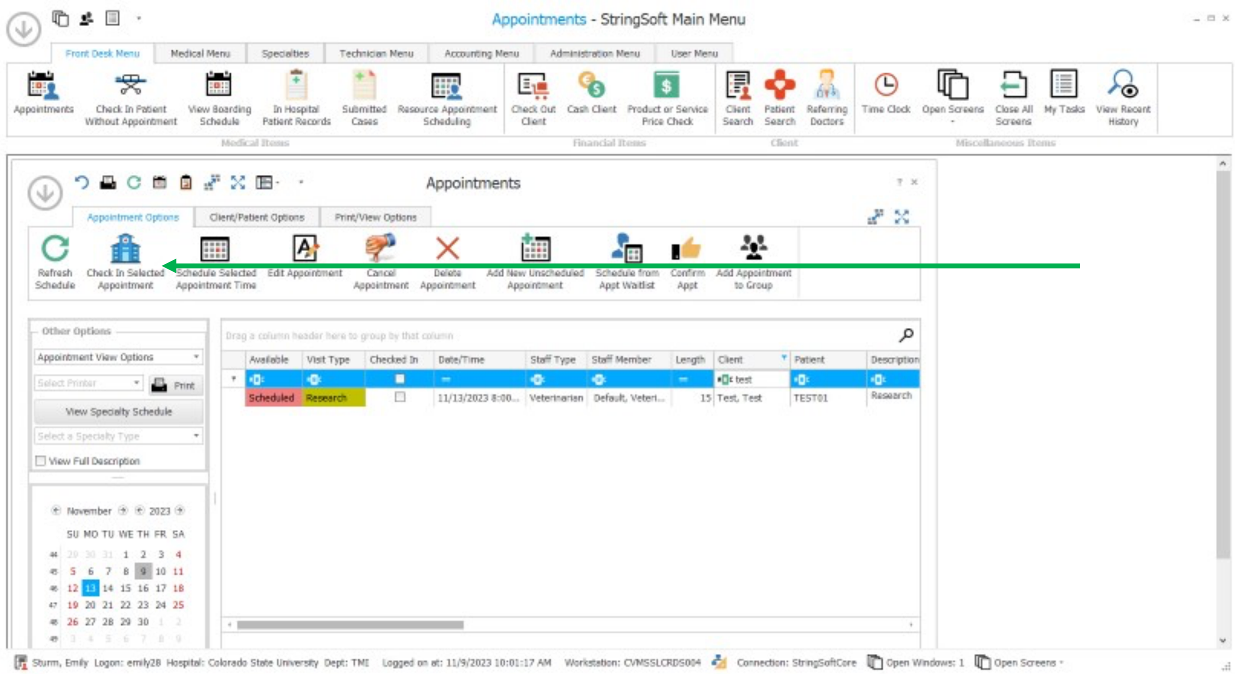
6. Make the visit type 'Research' then click save and exit.



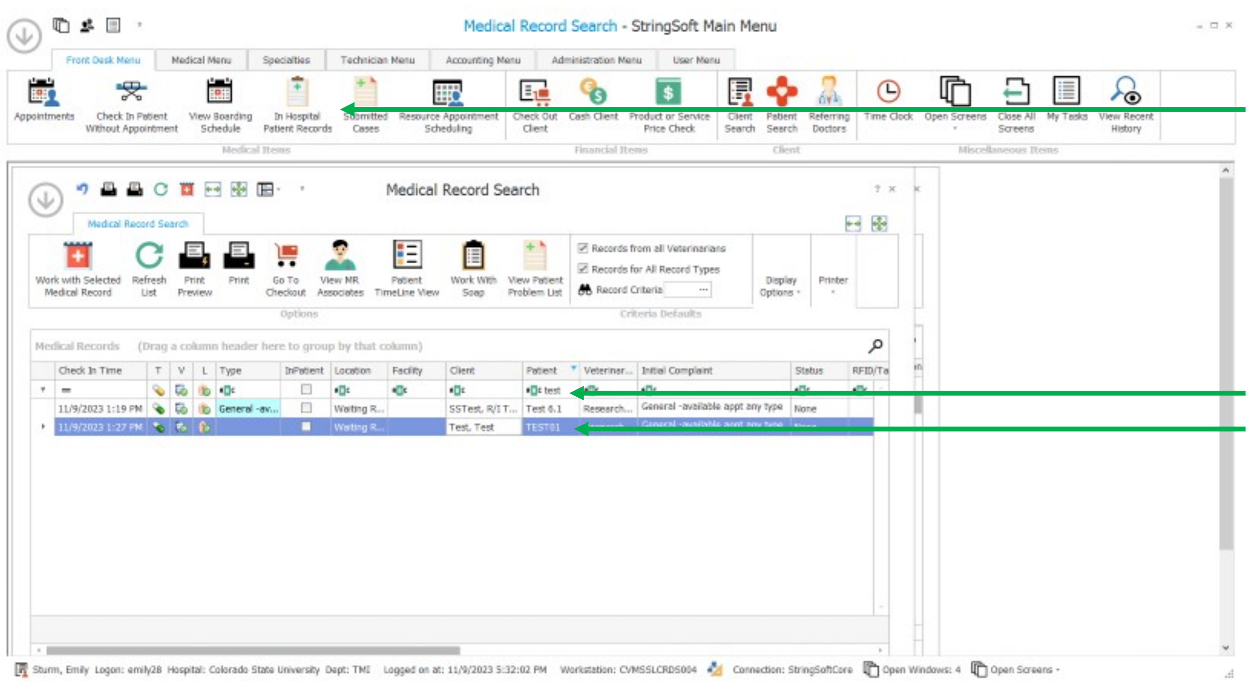
7. Now the record is ready to be placed. Go to the ‘Medical Menu’ (or ‘Front Desk Menu’) tab and click ‘Appointments’, then find your appointment by selecting the date that you made the order for and searching for your participant in the Patient column or your h account in the Client column which in this example is “Test, test”



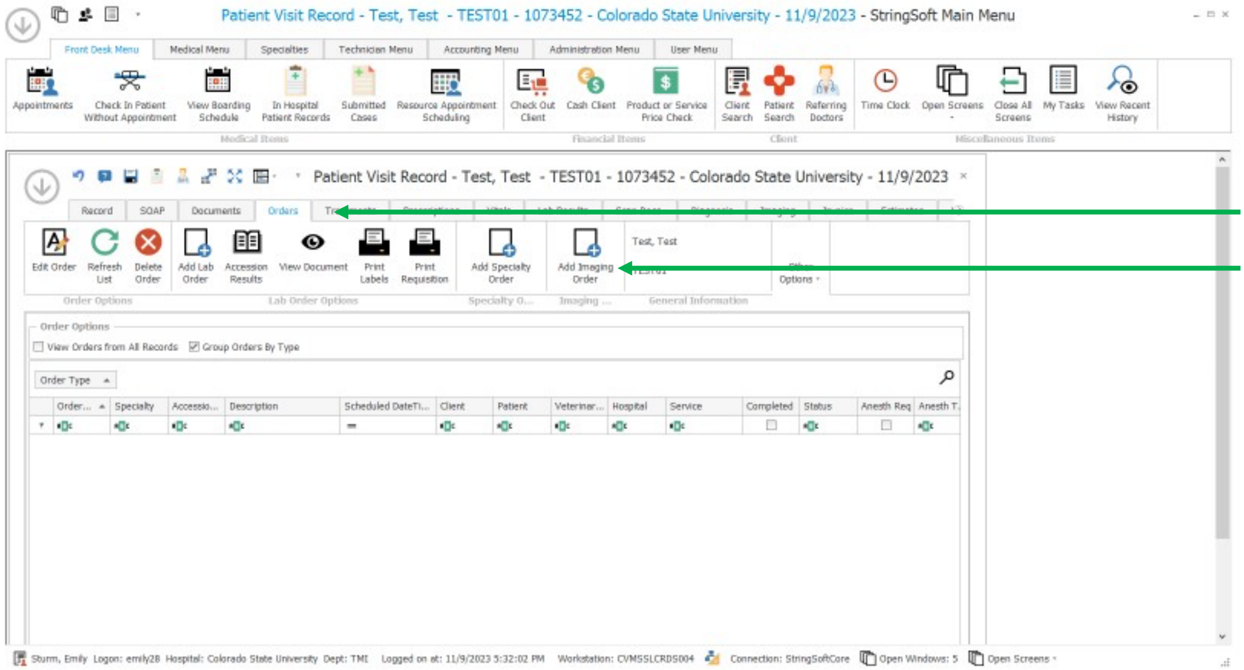
8. Select the appointment you want to create an order for and then click ‘Check In Selected Appointment’



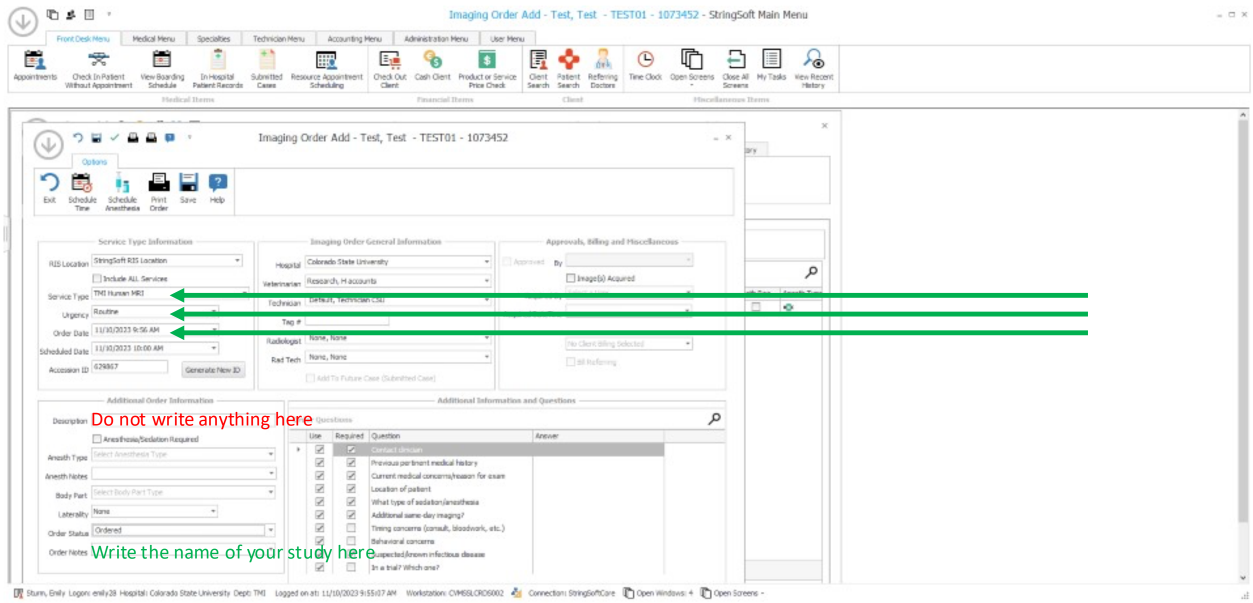
9. Save and close the check in window. Then, under the Front Desk Menu tab, click ‘In Hospital Patient Records’ (shows all open records, use client/h account and patient/participant number to find the visit record you need) and click on the visit you would like to create an order for. In this example it’s the visit for participant TEST01.



10. Click the ‘Orders’ tab and ‘Add Imaging Order’



11. Under 'Service Type' you can start typing to search and select 'TMI Human MRI', (This part may no longer be visible: for 'Urgency' Select 'Routine').
12. Change the order date to the day of the visit and DO NOT CREATE AN ORDER UNLESS YOU ARE IN THE SAME MONTH AS THE VISIT.
13. , NEVER TYPE ANYTHING IN THE DESCRIPTION FIELD, (this part is no longer in the exact location shown in this image, look farther down on the left for the orders drop down menu, for 'Orders' select 'Ordered'). Enter NA or no for all the fields next to the boxes checked 'required' in the bottom right-hand corner. Click save



14. Nikki will handle completing the order and then the charge will show up on the account. If you need to cancel or change an order, just email Nikki.

List of emails of people who need information about human MRI at TMI

Technicians:

Nikki.Dennard@colostate.edu

Jeff

Kevin

Erin

Research Assistants:

Melissa.Hansen@colostate.edu

Lydia.jacobs@colostate.edu

Elise.Robb@colostate.edu

Jazmin.Diaz@colostate.edu

Emily.Sturm@colostate.edu (notice that this is different from Emily.Merz)

Abu Sammoor,Mohd Mohd.Abu_Sammoor@colostate.edu

John.duffy@colostate.edu

P.I.s:

Carol.Seger@colostate.edu

Michael.Thomas@colostate.edu

Emily.Merz@colostate.edu (notice that this is different from Emily.Sturm)