Focus Group Manager

Guide for clients and moderators

RC Horowitz & Company

Edition of November 22, 2026

> This manual is also built into the app: open **Help** from any screen, or press **F1**.

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PART 1

For clients & moderators

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CHAPTER 1.1 · FOR CLIENTS & MODERATORS

Signing in

How to sign in to your recruitment grid and Master schedule — an e-mailed code or your Microsoft account, then the number from an authenticator app on your phone.

What it's for

Your project pages are shared only with people we have named. To keep them private, signing in takes two steps:

1. **A code we e-mail you** (or your own Microsoft account, if we set you up that way).
2. **The 6-digit number from an authenticator app** on your phone.

You do this once on each browser. After that you stay signed in for 30 days.

Before you start

- Have the link from your invitation e-mail. It starts with update.focusgroupmanager.com.
- Have your phone with you.
- The first time, install a free authenticator app from your phone's app store: **Microsoft Authenticator** or **Google Authenticator**. If you already have one of these, you can use it.

How to sign in with an e-mailed code

1. Open the link from your invitation.
2. Type your e-mail address (the one we invited) in **Your e-mail**.
3. Press **Send me a code**. The button says **Sending…** for a few seconds. Then the page says: "If that address has access, we have e-mailed it. Check your inbox: it will hold either your 6-digit code, or a note to use your Microsoft account instead."
4. Open the e-mail headed "Your code for (project)". Type the 6-digit code into **The 6-digit code we just e-mailed you**.
5. Press **Next** (the same button, now renamed).
6. Now do the authenticator step (below).

The e-mailed code works for 20 minutes, and only once. Once it has signed you in, it cannot be used again.

> **Note:** The page gives everyone the same answer, after the same short wait, whether or not the address is on the project. This keeps the list of people on your project private. If you typed the wrong address, you simply will not get an e-mail.

How to sign in with your Microsoft account

If your invitation said to sign in with your own Microsoft account:

1. Open the link.
2. Press **Use my Microsoft account** and sign in as you normally do at work.
3. You come back to the page, which says "Signed in with Microsoft. One more step..."
4. Now do the authenticator step (below).

If you type your e-mail and press **Send me a code** instead, no code is sent. You get an e-mail headed "Signing in to (project)" reminding you that your access uses your Microsoft account, with the link to open. Open it and press **Use my Microsoft account**.

The authenticator step

The first time: set up the app

The first time you sign in, the page shows **One-time set-up** and a square QR code.

1. On your phone, open **Microsoft Authenticator** or **Google Authenticator**.
2. Tap **+** or **Add account**, and choose to scan a QR code.
3. Point your phone's camera at the QR code on the screen.
4. The app adds an account called **RC Horowitz FGM** and shows a 6-digit number that changes every 30 seconds.
5. Type the number the app shows now into **Now type the 6-digit number the app shows**.
6. Press **Finish and sign in**.

Can't scan? Choose "enter a setup key" (or similar) in the app and type the key shown under the QR code. The page also shows the account name to use.

Every time after that

1. The page asks for your **Authenticator number**.
2. Open the app and find **RC Horowitz FGM**.
3. Type the 6-digit number it shows and press **Sign in**.

You only set the app up once for your e-mail address. The same entry in the app works for every project we share with you.

Each number works only once. If you have just signed in and need to sign in again (for example in another browser), wait for the app to show a new number.

After 8 wrong numbers in a row, the authenticator step is locked. See "If something goes wrong" below.

How to sign out

Press **Sign out** at the top of the page. On a shared or public computer, always sign out when you are done.

If something goes wrong

What you see	What to do
No code arrives	Check your junk or spam folder. Make sure you typed the address we invited. If you got an e-mail telling you to use your Microsoft account, press **Use my Microsoft account** instead. Otherwise press **Send me a code** again — if you press it twice inside a minute, only the first one is sent, so wait a moment and check again before asking once more. If still nothing comes, ask your recruiter to check the address they have for you.
"That code is not right, or it has expired — ask for a new one."	Check the code and type it again, using the newest e-mail if you asked more than once. If it still will not take, press **Send me a code** again and use the new one. Codes last 20 minutes, work only once, and allow six tries; every try counts, right or wrong.
"That number is not right — use the one showing in the app now."	The number changes every 30 seconds, and each number works only once. Type the one showing right now, or wait for the next one if you just used it. Check that your phone's time is set automatically.
"Too many wrong codes..."	You typed 8 wrong authenticator numbers. If you sign in with an e-mailed code, ask for a new code and start again; that unlocks it. If you sign in with your Microsoft account, ask your recruiter to reset your authenticator.
"Please start again with your e-mail address"	You took longer than 10 minutes between the two steps. Start again.
"This link is incomplete"	Use the full link from your e-mail.
"This link is no longer active"	The link was changed or switched off. Ask your recruiter for a new one.
"This project is complete and ... is no longer shared"	Access ends 30 days after a project is finished (after its final invoice or after it is closed, whichever comes first). Ask your recruiter if you still need something.

New phone or lost your phone?

Ask your recruiter at RC Horowitz & Company to reset your authenticator. They will check it is really you. At your next sign-in you will see a new QR code to scan with the app on your new phone.

Tips and common questions

- **Why two steps?** The pages show information about real people taking part in your research. Two steps make sure only the people you named can see it.
- **Do I need a password?** No. The e-mailed code (or your Microsoft account) and the authenticator number are all you need.
- **Will I have to do this every time?** No. You stay signed in on that browser for 30 days, unless you sign out.
- **I was already signed in, but now I am asked to sign in again.** If you signed in before the authenticator step was added, that older sign-in no longer counts. Sign in once more and set up the app; after that you stay signed in for 30 days.
- **Where can I read this again?** Press **? Help** at the top of your project page.

Related

- Your recruitment grid (1.2)
- Your Master schedule (1.3)

CHAPTER 1.2 · FOR CLIENTS & MODERATORS

Your recruitment grid

Your client portal — the studies list, each study's Overview, recruitment grid, calendar, AE Reporting, homework and NDAs, block-out requests, feedback, and (for project managers) who on your team can see it.

What it's for

The recruitment grid shows how recruiting is going on your project, kept up to date by RC Horowitz & Company. You can see who is scheduled in each session, who has qualified, who is on hold waiting for your OK, and how each person answered the screener.

To protect the people taking part, you see their first name and last initial only. No phone numbers, e-mail addresses or home addresses are ever shown.

Getting there

Open the link in the e-mail we sent you. If your project is shared with named people, you are asked to sign in first. See Signing in (1.1).

If you sign in at the **Your studies** page instead, you see every open study of yours on one page — see "Your studies" below.

Your studies

The **Your studies** page lists each open study as a card. Each card shows:

- the project number and the study name, its topic and methodology, and a status: **Starting**, **Recruiting**, **Fully recruited**, **On hold** or **Complete**;
- **Recruited** (for example 3 / 8) with a progress bar, and the **Next session** date;
- **Open study →**, which opens the study page, and when it was last updated;
- **Your project manager is…** — their name and title, then their **Direct** number, the **Office** number (212) 779-0033, the **Toll-free** number (888) 392-5000, and their **E-mail**.

At the top right are **? Help** (this guide) and 💬 **Feedback** (see "How to send us feedback" below).

The page at a glance

Your study page opens on its **Overview**. Across the top are tabs; you see only the ones shared with you:

Tab	What it shows	Who sees it
Overview	The study in brief (see "The Overview" below): methodology, topic, format, dates, **Available times**, locations, what respondents do before the session, the recruitment totals, what is still needed by segment, every time slot with its state, and your project manager.	Everyone
Recruitment grid	The grid itself (see "Reading the grid" below). ⬇ **Excel** appears on this tab.	People given the grid
Master schedule	Everyone scheduled, by day and session, with their answers and homework, and every time slot coloured by its state. Project managers and moderators can ask for time to be blocked out. See Your Master schedule (1.3).	People given the grid or the Master schedule
Calendar	The study's time slots by **Day**, **Week** or **Month**, coloured by state, with a "Coming up" list. Click a scheduled slot to see who is booked. See "The calendar" below.	Everyone
Homework	The homework folder: respondents' homework and study materials.	People given homework
NDAs	The NDA folder: signed confidentiality agreements.	People given NDAs
Locations	Where the sessions are held, with travel details, your team's own travel, and the itinerary when we have shared one. See "Locations" below.	Everyone
Recruiters	Each recruiter working on the study and how they are doing. See "Recruiters" below.	Everyone, when we turn it on
AE Reporting	Adverse events reported during recruitment: totals, anything outstanding, every report with a link to view it, and the audit trail. Healthcare studies only. See "AE Reporting" below.	Project managers and people given the grid
Files	Send us homework, screeners, NDAs and sample (client lists) securely, and see the files sent. See "Files" below.	Everyone named on the study (not the open link)
Who can see this	Your people and what each may see.	Project managers on your side

The top bar shows the project number and name, "prepared by RC Horowitz & Company", and the address you are signed in as, with **? Help**, 💬 **Feedback** and **Sign out**. The grid refreshes itself every 5 minutes while the page is open.

The Overview

- **Available times** on the left card is the number of time slots still open — every time slot, minus the ones with someone scheduled and the ones blocked out — for example **24 of 35**.

- **Recruitment** shows a progress bar and four totals: **Total n requested**, **Recruited**, **On hold** (people waiting for your OK) and **Still needed**. Below them, a table shows each segment's **Requested**, **Recruited**, **On hold** and **Still needed** (a ✓ means the segment is full).
- **Available Times — N** lists every time slot (each group or interview) with its date, time, length, session, place and how many are booked. Each row carries its state, as a word and a symbol as well as a colour:

State	Looks like	Means
○ **Open**	pale green	Nobody is booked yet.
● **Scheduled**	yellow	Someone is booked.
⛔ **Blocked**	red	The time is blocked out, so nobody will be booked.
◌ **Block requested**	grey, dashed	Someone on your side asked for it to be blocked; your recruiter has not approved it yet, so it is still open.

- **Your project manager** shows their **Direct** number, then the **Office** (212) 779-0033 and **Toll-free** (888) 392-5000 numbers, and their **E-mail**.

The calendar

1. Press the **Calendar** tab.
2. Pick **Day**, **Week** or **Month** at the top right. The page remembers your choice. Use **‹** and **›** to move, and **Today** to come back. Click a date number to open that day.
3. By default only the slots with someone scheduled are shown. Tick **Show all time slots** to add the open, blocked and block-requested ones.
4. Client project managers have two more boxes. **Show all my current studies** adds the other current studies you are named on. **Show all studies for (your company)** adds every current study we are running for your company. Click one to open it.
5. **Coming up**, under the calendar, lists what is next. Every line is a link: a scheduled time opens who is booked; anything else opens that day.

How to block out several times at once

Project managers and moderators on your side can press ⛔ **Block out times**. Click each open (○) time you want, so it turns dark with ☑, type why in the box if you like, and press **Request block out**. Each time shows as ◌ **Block requested** until your recruiter approves it. ✕ **Stop selecting** leaves without sending anything.

Each entry shows the time and the study name, coloured by its state (see the table above).

How to see who is booked in a slot

Click a yellow ● **Scheduled** slot (in the **Day** view, press 👤 **Who is booked**). A "Looking up who is booked..." message shows while it loads, then a window opens on one person at a time:

- their date and time, the moderator, and the **Moderator link**, **Client / observer link** and **Respondent link** for the session (or its session link);
- their segment and whether they have confirmed;
- 📄 **Show homework**, when homework is shared with you (it shows what has come in, or says nothing has yet);
- the summary of their screener answers.

Press **Next ›** or **‹ Back** (or the arrow keys) to go through everyone on the schedule in date and time order. **Close** ✕ (or Esc) closes it.

> **Note:** This works for people who can see the Master schedule. Others see the calendar without the names.

AE Reporting

On healthcare and medical studies (any medical topic, such as Healthcare or Medical/Disease, or any study marked as needing AE reporting), project managers and people given the grid have an **AE Reporting** tab:

- **Totals: Reported**, **Submitted to the sponsor**, **Acknowledged** and **Outstanding**, with a line for anything overdue (past one business day), sent late, or sent with details missing.
- **Outstanding:** each report not yet acknowledged, with its state (**Being taken — not submitted yet** or **Submitted — waiting for acknowledgement**), when it is due, the one-business-day clock, and when it was last chased.
- **All reports:** each report by number (for example AE-12) with the respondent (first name and last initial, or **Anonymised**), when it was reported, submitted and acknowledged (and by whom), its state, and whether it was on time.
- **View report ↗** opens the report itself — the same private page your safety contact received. Opening it is recorded.
- **Reconciliation:** the end-of-study reconciliations, including a nil return when there were no events.
- **Audit trail:** every step on every report — started, sent, opened, chased, acknowledged — with when and who.

Locations

The **Locations** tab shows the itinerary we shared with you (if there is one — 🖨 **Print / save as PDF** prints it), then a card for each place the sessions are held:

- the **Address**, **Phone**, **Website**, what to do **When you arrive**, **Parking** and **Public transport**;
- ✈ **Airports** nearby, with distances, and 🏨 **Hotels**, with any **Rate code**;
- 🧳 **Your team's travel** — see below.

If some sessions are online, a 💻 **Online** card says how many; their meeting links are on the Master schedule and in the calendar.

Untick **Show travel information** at the top to hide the airports, hotels and travel details (for example before sharing your screen). Your choice is remembered.

How to add your own travel

1. Under 🧳 **Your team's travel** for the location, press ＋ **Add my travel** (or ✎ **Edit my travel**).
2. Fill in what you like: ✈ **Flight** (airline, number, times), 🏨 **Hotel** (name, confirmation), 🚗 **Car** (rental company, confirmation) and **Notes**.
3. Press **Save**.

It is for reference: everyone on your side of the study can see it, and so can your project manager at RC Horowitz. To remove it, clear every box and press **Save**.

Recruiters

When we turn it on for your study, the **Recruiters** tab lists who is recruiting it — RC Horowitz & Company's own team and any outside recruiters — each with:

- **Assigned**, **Recruited** and **Still needed**, with a progress bar (people count once they are scheduled);
- the quotas they are responsible for (and their segments), with the number of seats — "the whole quota" means every seat in it;
- the times set aside for them, if any.

Only names and companies are shown.

Files

The **Files** tab is the safe way to send us a file instead of e-mailing it.

1. Under **What is it?**, choose **Homework**, **Screener**, **NDA**, **Sample (client list)** or **Other**.
2. Press **Choose file** and pick the file. PDF, Word, Excel, CSV, PowerPoint, text, pictures and zip files up to 50 MB are accepted.
3. Add a note if it helps (for example "Final screener, version 3").
4. Press **Send file**. You see "✓ Sent" and your project manager and recruiter are e-mailed straight away.

The file goes into the study's secure project folder at RC Horowitz & Company. You see the files you have sent; your project managers see every file sent on the study. Press a file's name to download it again. Only people named on the study, signed in, can use this tab.

The Portal Guide and the tour

? Help at the top of every page opens **The Portal Guide**: a short, friendly guide to everything on the portal. 🎬 **Tour** walks you through the portal in about two minutes, pointing at each tab as it goes.

How to send us feedback

1. Press 💬 **Feedback** at the top of the page.
2. Pick what it is about: **Something is not working**, **A question** or **A suggestion**.
3. Type what you saw or what you need, and press **Send**.

It goes to your project manager at RC Horowitz & Company, who will get back to you.

How to open homework and NDAs

Press the **Homework** or **NDAs** tab. Each file shows its name, date and size. Click a file name to open it in a new tab. Opening a file is recorded. If a tab is missing, that folder is not shared with you.

Meeting links

On the **Recruitment grid**, the **Schedule** tab has a column for each meeting link the sessions have: **Respondent link**, **Moderator link** and **End-client link** (Teams, Zoom or another service). They are there for reference; click one to open it. A session's tab shows its links above the table, and the Excel workbook has them too. The **Master schedule** shows the links in each session's heading.

Your own recruitment workbook

On some studies the recruiting is kept in a spreadsheet of your own, filled in by hand. Then the **Recruitment grid** tab shows a 📎 **Recruitment workbook** box with the file's name, size, when it was posted and any note, and a ⬇ **Download** button. It is the newest copy your recruiters have posted; the page refreshes itself, so you always get the latest. On such a study the box may stand alone, with no grid tables and no ⬇ **Excel** button — the workbook is the grid.

Managing your own people (project managers)

If we named you as a **project manager** on your side, you have a **Who can see this** tab. You add your co-managers, moderators and end clients, with their names, e-mail addresses and phone numbers, and decide what each one sees: the grid, the homework, the NDAs and the Master schedule. Changes take effect straight away.

- **Who they are** can be **A colleague**, **A co-manager** (a colleague who can also add and remove people), **A moderator** or **End client**.
- **Name & phone** under someone's name lets you change their name and phone number.

The list

Column	What it shows
Person	Their name, e-mail and company.
(tag)	**manager**, **moderator** or **end client**.
Grid	Tick to share the recruitment grid.
Homework	Tick to share homework files.
NDAs	Tick to share NDA files.
Master schedule	Tick to share the **Master schedule** tab on its own, without the grid (for a moderator, say). Everyone with the grid has the Master schedule tab already.
Last in	When they last opened the project, or "not yet".
Buttons	**Remove** and **Make co-manager**.

A project manager's tick boxes cannot be changed here. Ask your recruiter if a project manager needs something different.

How to add someone

1. Under **Add someone — e-mail**, type their e-mail address.
2. Type their **Name** (optional).
3. Pick **Who they are**: **A colleague**, **A moderator** or **End client**.
4. Pick **How they sign in**: **E-mailed code**, or **Their Microsoft account** if your company uses Microsoft 365 and they would rather use that.
5. Press **Give access**.

Colleagues and end clients start with the grid (which includes the Master schedule tab). Moderators start with the Master schedule and the homework. Tick or untick any box in the list to change it.

> **Important:** We do not e-mail the people you add. Send them the link to this page yourself (the address in your browser). When they open it, they sign in with their own e-mail address. See Signing in (1.1).

How to change what someone sees

Tick or untick their boxes in the list. The change is saved at once.

How to remove someone

Press **Remove** on their row and confirm. They can no longer open the project.

You cannot remove yourself. If you are leaving the project, make someone else a co-manager first, then ask your recruiter to remove you.

How to make someone a co-manager

Press **Make co-manager** on their row and confirm. They get every tick and can add and remove people too. Every project manager has the same standing.

Tips and common questions

- **Is this the latest information?** Yes. The page always shows the current data and refreshes every 5 minutes. The heading shows the time it was last updated.
- **Why only first names?** To protect the privacy of the people taking part.
- **Someone on my team cannot sign in.** Check they are in your **Who can see this** list with the right e-mail address, and that they are using the same link.
- **The page says the link is no longer active.** Ask your recruiter for a fresh link.
- **The project is finished.** The grid stays available for 30 days after the project is completed, then it is no longer shared.
- **Someone I added says no code arrived.** If you set them to sign in with their Microsoft account, they get a note by e-mail instead of a code and should press **Use my Microsoft account**. Otherwise see Signing in (1.1).

Related

- Signing in (1.1)
- Your Master schedule (1.3)

CHAPTER 1.3 · FOR CLIENTS & MODERATORS

Your Master schedule

How to use the Master schedule tab — everyone scheduled on your project, day by day and session by session, with a summary of their screener answers and their homework.

What it's for

The Master schedule gives you what you need to run your sessions, on one list:

- **everyone who is scheduled**, grouped by day and then by session, in time order,
- whether each person has **confirmed**,
- a **summary of their screener answers**, and
- each person's **homework**, if homework is shared with you.

To protect the people taking part, you see their first name and last initial only (the name they like to be called, with pronouns when we have them). A title such as MD is shown only for healthcare professionals. No contact details are ever shown.

Getting there

Open the link in the e-mail we sent you. If you have been named on the project, sign in. See Signing in (1.1).

The page has two tabs at the top:

- **Recruitment grid**: the full grid. See Your recruitment grid (1.2).
- **Master schedule**: the list described here.

Press a tab to switch between them. If only the Master schedule is shared with you (for example, if you are the moderator), you see just the **Master schedule** tab.

> **Tip:** If you had a link to the old moderator view, it still works. It now opens this page on the **Master schedule** tab.

The page at a glance

- **Top bar:** the project, "prepared by RC Horowitz & Company" and the address you are signed in as. On the right: **? Help** (opens the guide) and **Sign out**.
- **The tabs: Recruitment grid** (if the grid is shared with you) and **Master schedule**.
- **The bar above the list:** a **Find a name or segment…** box, a **Show every answer** tick box, the totals, and 🖨 **Print**.

- **The list:** one heading for each day, a line for each session, and a table of the people in that session.

The totals show how many people are scheduled, how many have confirmed (✔), and how many sessions there are.

The tab refreshes itself every 5 minutes while it is open, so late changes and confirmations appear without you doing anything.

How to read the list

Days

Each day has a heading such as "Tuesday, Oct 20, 2026", earliest day first. "Not in a session yet" lists people who are scheduled but have not been placed in a session.

Sessions

Under each day, sessions are listed in time order. Each session line shows:

- **the time**, with the time zone when we have it ("Time to be set" if it is not fixed yet),
- **the session description**,
- 📍 **the venue and room**,
- 🔗 **Session link** for an online session, which opens the meeting,
- **on the right**, how many are scheduled out of the places available, and how many have confirmed (✔).

People

Within each session, people are listed in name order. The columns are:

Column	What it shows
Respondent	First name and last initial, with pronouns when we have them, and a title for healthcare professionals.
Segment	The group or groups the person was recruited for.
Confirmed	✔ **Yes** or **Not yet**.
Homework	📄 **Homework**, with the number of files, or "None yet". This column is there only when homework is shared with you.
Screener answers	A summary of how they answered the screener (see below).

Screener answers

The first 3 answers are shown, each as the question number, the question and the person's answer. Hover over a question to read all of it.

If there are more, press **See all answers** to see the rest. "No screener answers on file" means we have none to show for that person.

Answers about children show only how many children and each child's age and gender.

How to find someone

Type in the **Find a name or segment…** box. The list narrows as you type to the people whose name or segment matches. Clear the box to see everyone again.

If nobody matches, the page says so.

How to see every answer at once

Tick **Show every answer**. Every person's full set of answers opens, so you do not have to press **See all answers** one by one. Untick it to go back to the short summary.

How to open a respondent's homework

If homework is shared with you, the **Homework** column shows 📄 **Homework** for people whose homework has come in, or "None yet".

1. Press 📄 **Homework**. A pop-up opens with the respondent's name.
2. Each file has a button, for example **File 1 · PDF · 240 KB**. Press one to open it. If there is only one file, it opens by itself.
3. PDFs, pictures, videos, audio, text and Word documents open inside the pop-up. Other kinds of file say "This kind of file cannot be shown here."
4. Press ⬇ **Download** under the file to save a copy.
5. Press **Close** ✕, press Esc, or click outside the pop-up to close it.

If the pop-up says the homework has been received but the file is not available online yet, ask your recruiter for a copy.

Opening a homework file is recorded.

How to print the Master schedule

Press 🖨 **Print**. The printout shows every answer for every person, whether or not **Show every answer** is ticked. The search box, tabs and buttons are left off the printout.

> **Tip:** To print only some people, type a name or segment in the search box first. The printout shows only the people in the list.

Time slots and their colours

Each session heading carries its state as a word, a symbol and a colour: ○ **Open** (pale green), ● **Scheduled** (yellow), ⛔ **Blocked** (red) and ◌ **Block requested** (grey, dashed). The coloured keys at the top count each kind.

By default the Master schedule shows only the slots with someone scheduled. Tick **Show all time slots** to see the open, blocked and requested ones too.

How to ask for time to be blocked out

Project managers and moderators on your side can ask for a time to be blocked out — a slot, a range of hours, or a whole day — so nobody is booked into it.

1. Tick **Show all time slots**.
2. To block one slot, press ⛔ **Request block** on it. To block a range or a day, press ⛔ **Request a block-out** at the top, pick the **Date**, type **From** and **To** (for example 9:00 AM and 1:00 PM — leave both empty for the whole day), add a **Note** if you like, and press **Send request**.
3. The time shows as ◌ **Block requested** (grey) until your recruiter at RC Horowitz approves and publishes it. Then it turns red, ⛔ **Blocked**.

To ask for several times at once, use the **Calendar** tab: press ⛔ **Block out times**, click each open time, and press **Request block out**.

- **Withdraw request** cancels a request that has not been approved yet.
- **Ask to reopen** on a blocked time asks for it to be opened again; it stays blocked until your recruiter approves.
- A slot where someone is already booked cannot be blocked. Call your project manager to move them first.

Everyone involved hears about each change by e-mail, and every request, approval and change is kept in the project's calendar audit.

Schedule-change e-mails

When a session is added, cancelled, moved, changes place or changes moderator, you get one short e-mail listing what changed, with a link to the Master schedule. To stop them, ask the client's project manager (on **Who can see this**) or your recruiter to untick ✉ **Schedule e-mails** for you.

Reporting an adverse event

On a healthcare study you also have the **AE Reporting** tab. If a respondent mentions a side effect, a problem with a medicine, or a pregnancy while taking one, press **⚠ Report an adverse event**:

1. Pick the respondent (or "not sure").
2. Say when you heard it (leave it empty for now).
3. Write what they said, in their words, and press **Report it**.

It goes onto the standard FDA-style adverse event form in our system, the one-business-day clock starts, and our team finishes it and sends it to the sponsor. If your company has its own reporting process, keep using it as well.

Tips and common questions

- **The page says "The schedule is not shared with you on this project".** Ask your recruiter to share it with you.
- **I don't see a Homework column.** Homework has not been shared with you. Ask your recruiter.
- **I only see the Master schedule tab, not the grid.** The grid has not been shared with you. Ask your recruiter if you need it.
- **Is this up to date?** Yes. The tab refreshes every 5 minutes while it is open, and shows the current schedule and confirmations.
- **The project is over.** The Master schedule stays available for 30 days after the project is completed.

Related

- Signing in (1.1)
- Your recruitment grid (1.2)