iScheduler

Self-Scheduling
Non-Clinical - User Guide

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1.0 OVERVIEW

The documentation in this guide is based on the assumption that a user already has a basic understanding of how the iScheduler system works and has completed site contact or non-clinical site contact training.

TELUS iScheduler™
TELUS iScheduler is a web-based scheduling solution that enables MBTelehealth (MBT) to schedule telehealth services across different departments, clinics and sites within their community and province as well as national and international locations. Using a secure internet Web browser, users can schedule telehealth appointments, education/administrative sessions and view basic health information.

Meetings
Meetings encompass all non-clinical telehealth events as well as clinical block booking and events when a multi-point connection is required. Education and Administrative events are scheduled using the virtual meeting function and include the date, time, sites, rooms, and codecs of all participating sites as well as contact information for participants and any additional information that may be included with the request. Booking forms are stored within the meetings as attachments for users who have the appropriate permissions to access.

Attachments
Booking forms submitted to the MBT schedulers will be included as attachments to the appointments and meetings created by the MBT schedulers. There will be no attachments for events created by self-schedulers as they will be inputting all the necessary information directly into the event.

Permissions
iScheduler controls access to information through user and group based permissions. This allows for multiple levels of access to be created based on a user's specific needs and requirements. By limiting the amount of access a user receives to a site and the menu options they are assigned, MBT is able to limit access to personal health information.

2.0 SYSTEM ACCESS

To access the iScheduler system, click the following link or copy and paste it into your Internet Explorer (IE) browser:

https://schedule.mbtelehealth.ca/default_login.asp

The link will take you to the Log On screen. Once you have entered your Username and Password, click **SUBMIT**.

IScheduler Log On Screen

Note: The first time you access the system you will be asked to accept a licensing agreement and to change your password.

You will be prompted to enter a secure password which must meet 3 of the 4 criteria listed below and be a minimum of 8 characters:

- English lowercase characters (s)
- English uppercase characters (S)
- Numeric characters (1)
- Special characters (!, -, ?, etc.)

3.0 MEETINGS

The meetings menu provides access to information and functionality regarding meetings scheduled at your site(s). You are able to create, view, search, edit and report on events using the functions within this menu.

3.1 Education/Administrative Event Entry

Education and administrative events are both entered as meetings in the iScheduler system. By selecting the appropriate template and following the scheduling wizard, a user can easily create an education or administrative event.

Note: Some events are not appropriate for self-scheduling and must be entered by an Scheduler. See Appendix A for a listing of Events Not Appropriate for Self Scheduling.

3.1.1 To create an Education/Administrative event:

1. Click **meeting template** to expand the menu then select **APPLY.**

meeting template

APPLY

2. Enter the name (or partial name) in the **Template Name** field then click **GO.**

Template Name: Cancer					GO

Found: 2 Displaying: 1-2   previous | **1** | next

ID	NAME	DESCRIPTION	HOST SITE	HOST LOCATION	MEETING TIME	ACTION
393	Cancer Day		Winnipeg-CCMB MacCharles	ON-2134	09:00 - 17:00	apply
394	CancerPro		Winnipeg-CCMB MacCharles	ON-2134	09:00 - 17:00	apply

Found: 2 Displaying: 1-2   previous | **1** | next

3. If you are unable to find the required Template, complete a Non-Clinical Booking Form (Appendix B) and submit to MBT schedulers with the **iScheduler Template Required** box checked. The schedulers will input the event and save the template for future use.

iScheduler Template Required: ☑ * (For self schedulers only)

4. Click **apply** beside the template you want to use then review the information in **STEP 1** of the **Apply Template** window.

STEP 1 - SITE & ROOM	STEP 2 - SCHEDULE	STEP 3 - PARTICIPANTS	STEP 4 - COMMENTS

MEETING TOPIC	Education	MEETING TYPE	Virtual
SUBJECT	Cancer Day	DESCRIPTION	
HOST SITE	Winnipeg-CCMB MacCharles	HOST ROOM	ON-2134
EQUIPMENT	EQUIPMENT	ROOM CODEC	VCU1
SUPPORT TYPE	Service Desk	☑ Open Registration?	

Note: Open registration means any site can add themselves to this event. Leave this box unchecked if you want to control access to your event.

5. Once completed, click on the **STEP 2** and enter the date and time of the event.

Apply Template   ✖

STEP 1 - SITE & ROOM	STEP 2 - SCHEDULE	STEP 3 - PARTICIPANTS	STEP 4 - COMMENTS

STARTDATE	6/5/2012	ENDDATE	9/4/2012
STARTHOUR	11 ▼ 00 ▼	ENDHOUR	12 ▼ 00 ▼
MEETING DURATION	60 (in minutes)		
DATE TYPE	Weekly		

Click to Open Calendar

	☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☑ Fri ☐ Sat
	Every 1 week(s)

6. Click on the **STEP 3** tab then scroll through the **AVAILABLE PARTICIPATING SITES** and select/double check the participating Site(s), Room(s) and Codec(s) to be included in the event. Click **STEP 4** to continue.

7. Enter comments (if any) then click **APPLY TEMPLATE** to complete the booking.

8. If all sites are available you will receive a message stating:
    Meetings have been successfully created!

9. If one or more of the rooms/codecs are not available, a **Conflicting Schedules** window will open to show you why the room or equipment is not available.

    Click **view** to see the conflicting event then click **close** to close the window and go back and make modifications to your clinic template so it is not in conflict.


3.2   Editing Meetings

Once an event has been created, users with appropriate permissions have the ability to make changes including adding and removing sites, changing the host site and changing the date/time of the event.

3.2.1 **To add an attendee site(s):**

1. Click on **meetings** to expand the menu then find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH**

2. In the **Meeting Detail** screen on the **MEETING NAME (ID)** line, click **add site**


3. When the **Add Site** window opens, select the **ATTENDEE SITE, ATTENDEE ROOM,** and the **CODEC** from the drop down lists then click **ADD.**
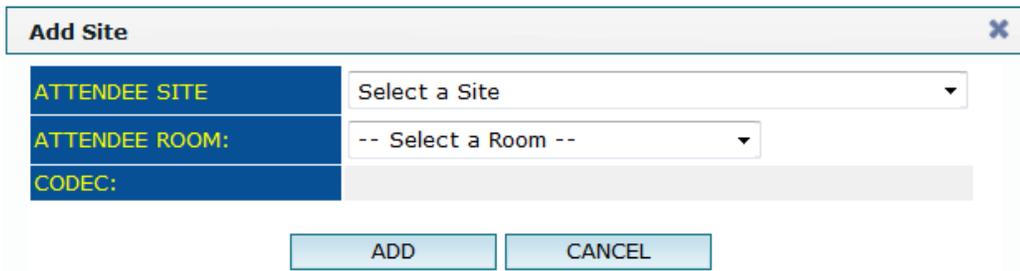
4. If any of the options selected above are unavailable, you will receive a message similar to the on below, click **OK** to close and then change the options as necessary.

5. If everything is available you will receive the following message, click **OK** to complete.
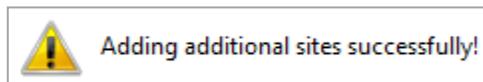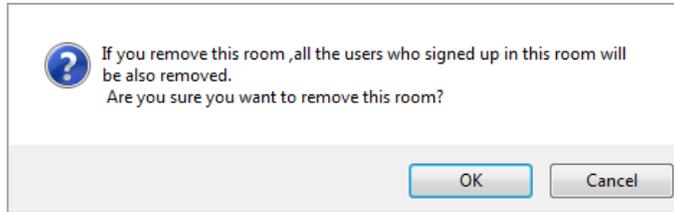

6. Follow steps 2-5 to add additional sites to the event.

3.2.2 **To remove an attendee site(s):**

1. Click on **meetings** to expand the menu then find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH**

2. In the **Meeting Detail** screen click [rem] beside the site you want to remove from the meeting.
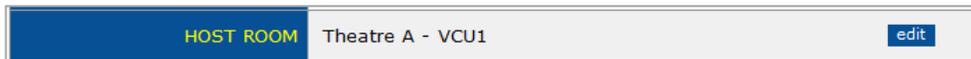
3. Click **OK** when the pop up opens asking if you are sure you want to remove this room.

4. Enter the reason for removal when prompted then click **SAVE** to complete.
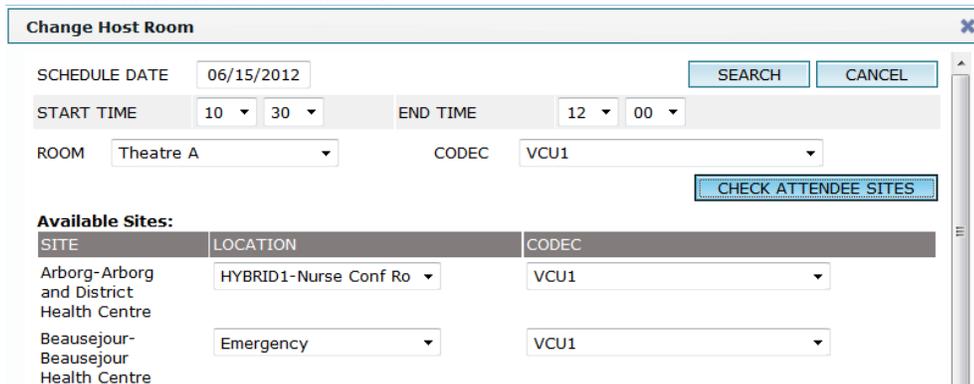
3.2.3 To change the date/time of an event:

1. Click on meetings to expand the menu then find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH**

2. In the **Meeting Detail** screen on the **HOST ROOM** line, click **edit**

3. In the **Change Host Room** window, click on **CHANGE DATE/TIME**
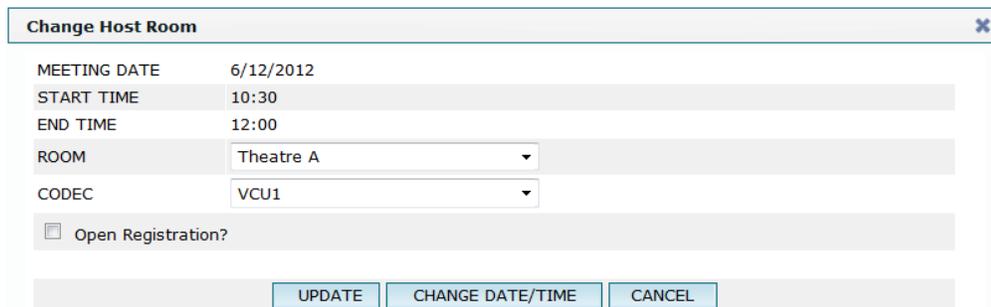
4. Select the new **DATE/TIME** then click **SEARCH.** Click **CHECK ATTENDEE** sites to confirm all are available.
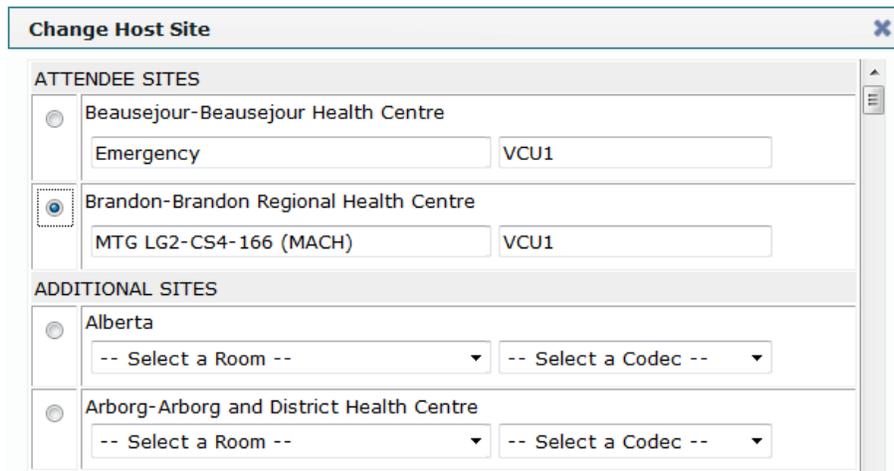

5. Scroll to the bottom and click [CHANGE] then click **OK** twice to complete the change.

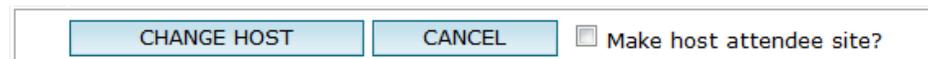**3.2.4**   **To change the host site of an event:**

1. Click on meetings to expand the menu then find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH**

2. In the **Meeting Detail** screen on the **HOST SITE** line, click **change**

3. When the **Change Host Site** window opens, select the new host site from the **ATTENDEE SITES** or any of the **ADDITIONAL SITES** available.


4. Scroll to the bottom of the page and click **CHANGE HOST**. Ensure you check off **Make host an attendee site?** if you want them to still be included in the event.


5. Click **OK** when prompted then click **OK** again when the message appears stating that the change has been made successfully.
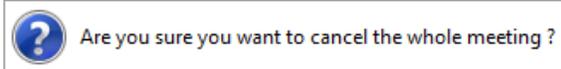

3.2.5   **To cancel an event:**

1. Click on meetings to expand the menu then find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH**

2. In the **Meeting Detail** screen on the **MEETING NAME** line, click **cancel**
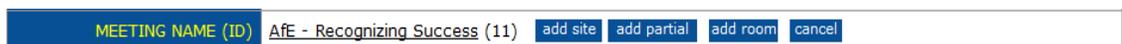
3. Select **Cancel with notification** then click **Submit**
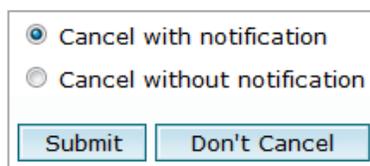
4. Click **OK** to confirm you want to cancel the whole meeting

5. Enter the **REASON FOR CANCELLATION** then click **SAVE** to complete the cancellation.

Acknowledgements:

MBTelehealth
http://www.mbtelehealth.ca

e>ceptionist
http://www.eceptionist.com/

APPENDIX A - EVENTS NOT APPROPRIATE FOR SELF SCHEDULING

The following items are considered not appropriate for self-scheduling and must be entered by the MBTelehealth Schedulers.

- Billable events
- Events involving Out of Province Connections
- Events involving Out of Network Connections
- Events requiring Partial Bookings
  - I.e. only attending part of a scheduled event
- Non-Templated events
- Events scheduled outside of regular operating hours
  - Mon-Thurs 730-2100 and Friday 730-1700
- Next day events created past the Noon cutoff
- Clinical Multi-Site
- Televisitation