

# iScheduler

## Self-Scheduling Non-Clinical - User Guide

## TABLE OF CONTENTS

1.0	OVERVIEW .....	3
2.0	SYSTEM ACCESS .....	3
3.0	MEETINGS .....	4
3.1	Education/Administrative Event Entry .....	4
3.1.1	To create an Education/Administrative event: .....	5
3.2	Editing Meetings .....	7
3.2.1	Change the layout for a multi-site event: .....	7
3.2.2	To add an attendee site(s): .....	7
3.2.3	To remove an attendee site(s): .....	8
3.2.4	To change the date/time of an event: .....	8
3.2.5	To change the host site of an event: .....	9
3.2.6	To cancel an event: .....	10
3.3	Whiteboard .....	10
	APPENDIX A - EVENTS NOT APPROPRIATE FOR SELF SCHEDULING.....	11

## 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.

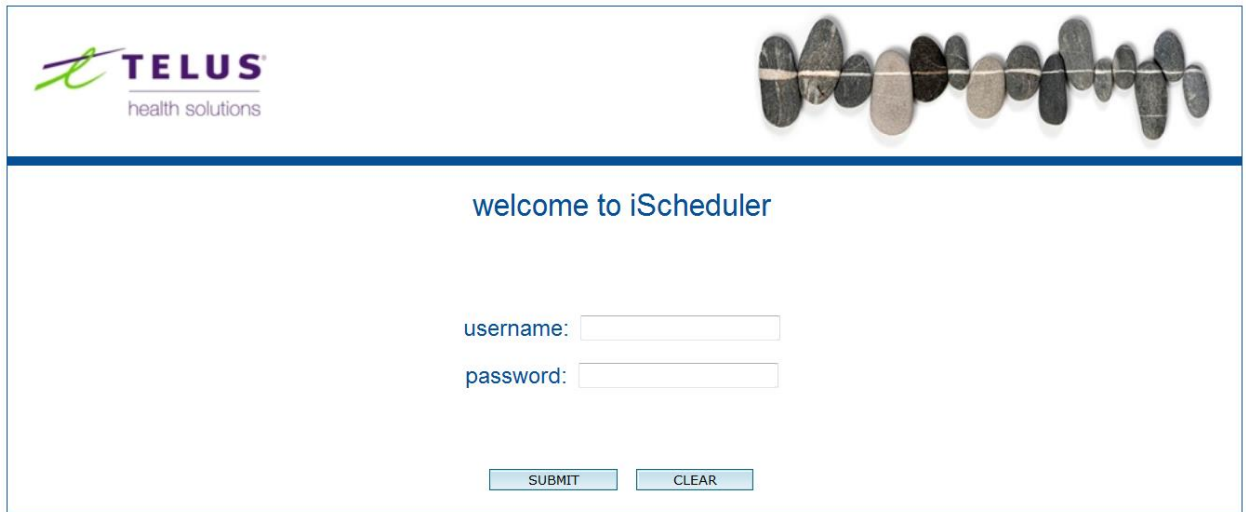
## 2.0 SYSTEM ACCESS

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](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



The screenshot shows the iScheduler login interface. At the top left is the TELUS health solutions logo. At the top right is a decorative graphic of smooth, dark and light-colored stones. The main content area has a blue header with the text "welcome to iScheduler". Below this are two input fields: "username:" and "password:". At the bottom of the form are two buttons: "SUBMIT" and "CLEAR".

telushealth.com | legal | privacy © 2012 TELUS .

powered by eceptionist®



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

**Password Change**

Please change your default password.

OLD PASSWORD

NEW PASSWORD

CONFIRM

**CHANGE 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

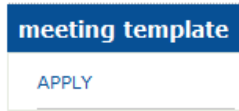
Education and administrative events are both entered as meetings in the iScheduler system. By selecting the appropriate template and following the scheduling wizard, a user can easily create an education or administrative event.



**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**.



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

Found: 2 Displaying: 1-2 Template Name:

ID	NAME	DESCRIPTION	HOST SITE	HOST LOCATION	MEETING TIME	ACTION
393	Cancer Day		Winnipeg-CCMB MacCharles	ON-2134	09:00 - 17:00	<input type="button" value="apply"/>
394	CancerPro		Winnipeg-CCMB MacCharles	ON-2134	09:00 - 17:00	<input type="button" value="apply"/>

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

3. 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	<input type="button" value="EQUIPMENT"/>	ROOM CODEC	VCU1
SUPPORT TYPE	Service Desk	<input checked="" type="checkbox"/> 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.

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

Apply Template x

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		
	<input type="checkbox"/> Sun <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input checked="" type="checkbox"/> Fri <input type="checkbox"/> Sat		
	Every 1 week(s)		

Click to Open Calendar

5. 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.

**Apply Template** [X]

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

AVAILABLE PARTICIPATING SITES

SITE	ROOM (SIZE)(SUPPORT TYPE)	CODEC
Alberta	-- Select a Room --	-- Select a Codec --
Arborg-Arborg and District Health Centre	-- Select a Room --	-- Select a Codec --
Ashern-Lakeshore Hospital	CLIN1-Old L&D (10) Service Desk	VCU1
Beausejour-Beausejour Health Centre	-- Select a Room --	-- Select a Codec --
Berens River-Nursing Station	-- Select a Room --	-- Select a Codec --
Bloodvein-Bloodvein Nursing Station	-- Select a Room --	-- Select a Codec --
Brandon-Brandon Regional Health Centre	CLIN1-Clinics Exam Room 3 (4) Service	VCU4
Brandon-Brandon Town Centre	-- Select a Room --	-- Select a Codec --
Brandon-Western Manitoba Cancer Centre	-- Select a Room --	-- Select a Codec --
British Columbia	-- Select a Room --	-- Select a Codec --
Brochet-Barren Lands-Nursing Station	-- Select a Room --	-- Select a Codec --
CFB Shilo	-- Select a Room --	-- Select a Codec --
Churchill-Churchill Regional Health Authority	-- Select a Room --	-- Select a Codec --

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

**Apply Template** [X]

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

COMMENTS

Create Meeting on bank holidays
  Ignore Conflicts
  Add Attachment

**APPLY TEMPLATE**

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

[close]

Conflicting Schedules							[Print]
Event	EventID	Site	Room	Start Time	End Time	Detail	Action
Meeting	174	Swan River-Swan Valley Health Centre	CLIN1-Telehealth Clinic Rm	6/15/2012 11:00 AM	6/15/2012 12:00 PM		<a href="#">view</a>
Equipment	0	Swan River-Swan Valley Health Centre	CLIN1-Telehealth Clinic Rm	6/15/2012 11:00 AM	6/15/2012 1:00 PM	Selected equipment VCU1 is not available for the selected time.	

### 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. For multi-site events, the layout can also be changed prior to the start of the session.

#### 3.2.1 Change the layout for a multi-site event:

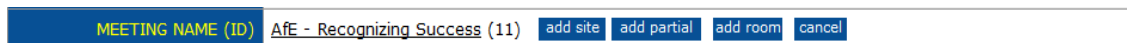
The default layout for multi-site events is shown on the right but there are other layout options available. The host/presenter determines the layout for the session.



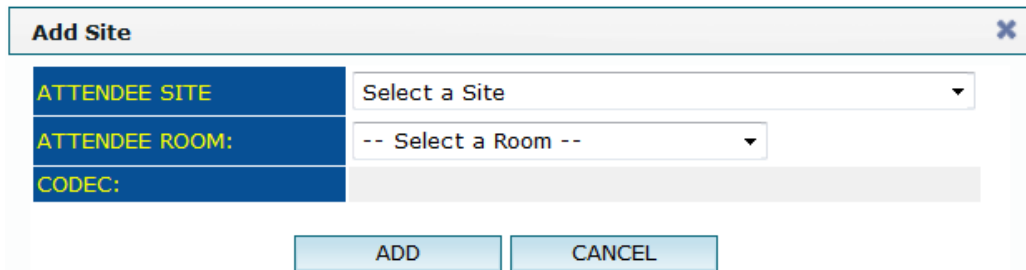
1. Click on meetings to expand the menu then find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH**.
2. On the **Meeting Detail** screen, click on the **Change Layout** button.
3. Select the preferred layout, click **OK** on the pop-up message and close the window to activate the change.

#### 3.2.2 To add an attendee site(s):

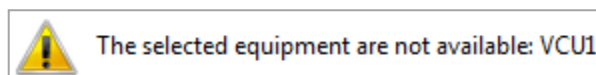
1. Click on **meetings** to expand the menu then find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH**
2. In the **Meeting Detail** screen on the **MEETING NAME (ID)** line, click **add site**



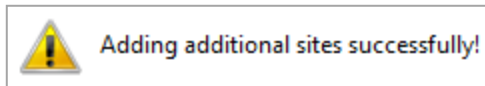
3. When the **Add Site** window opens, select the **ATTENDEE SITE**, **ATTENDEE ROOM**, and the **CODEC** from the drop down lists then click **ADD**.



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.



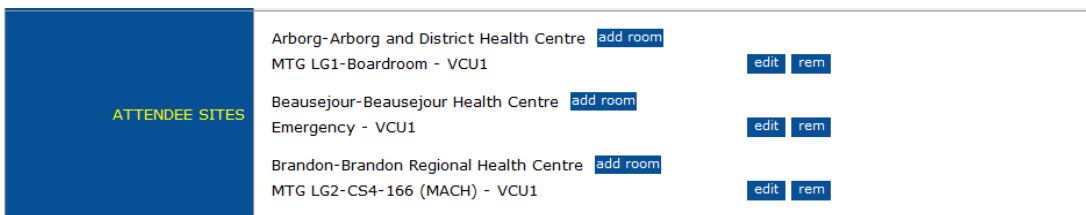
5. If everything is available you will receive the following message, click **OK** to complete.



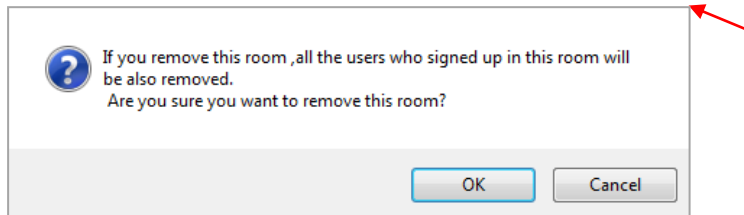
6. Follow steps 2-5 to add additional sites to the event.

### 3.2.3 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.



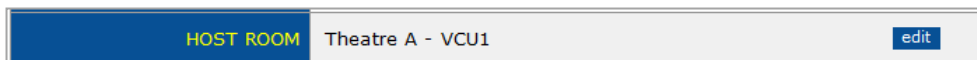
3. Click **OK** when the pop up opens asking if you are sure you want to remove this room.



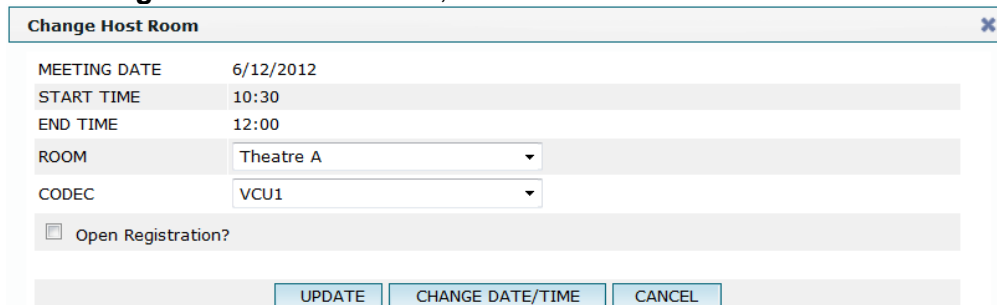
4. Enter the reason for removal when prompted then click **SAVE** to complete.

### 3.2.4 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.

Available Sites:		
SITE	LOCATION	CODEC
Arborg-Arborg and District Health Centre	HYBRID1-Nurse Conf Ro	VCU1
Beausejour-Beausejour Health Centre	Emergency	VCU1

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

### 3.2.5 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.

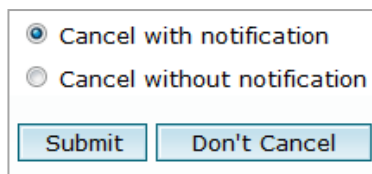
- Click **OK** when prompted then click **OK** again when the message appears stating that the change has been made successfully.

### 3.2.6 To cancel an event:

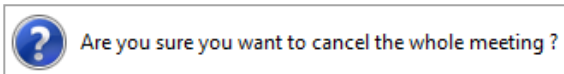
- Click on meetings to expand the menu then find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH**
- In the **Meeting Detail** screen on the **MEETING NAME** line, click **cancel**



- Select **Cancel with notification** then click **Submit**



- Click **OK** to confirm you want to cancel the whole meeting



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

## 3.3 Whiteboard

The **WHITEBOARD** report is a printable report that displays clinical and non-clinical event information for one or all sites the user has primary access to. Print the Whiteboard each day to show all events. If you have missed the connection for a multi-site event, you will find the self-serve connection information on the Whiteboard as well.

Whiteboard Report			
Total Number of Events on 4/11/2019 : 4			
test_1372			
Start: 4/11/2019 13:15		End: 4/11/2019 14:00	
If you are registered for this multi-site telehealth session and the event is already in progress and you are <b>NOT</b> connected, dial the appropriate number below. (Note: If you have not registered for this event you must contact the MBT Schedulers to be connected.) On MBT network: 1100001372 and enter PIN 13361 when prompted Outside of MBT network: 1100001372@test.mblehealth.ca			
Host:	Site	Room	Codec
	Winnipeg-MB eHealth	Test Room	VCU2 (51101)
Attendees:	Alberta Altona-Altona Community Memorial Health Centre Winnipeg-Health Sciences Centre	Alberta Bridge HYBRID1-Conference/Library CE-130	VCU1 VCU1 VCU7 (50500)
Comment:	test -- 4/3/2019 3:56:45 PM (Shawn Lund)		

**Acknowledgements:**



**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