iScheduler User Guide

Self-Scheduling for Non-Clinical Events

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1.0 OVERVIEW

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.

Clinics

In the iScheduler system, a clinic is considered the provider side of any clinical event. Prior to scheduling a patient appointment, a clinic must be created for the provider that identifies their site, room, codec, availability (date and time), procedure (specialty), appointment type (follow up, clinical consult, etc), and any additional equipment that may be required.

Appointments

Appointments are the patient side of clinical events. Once a clinic has been created for the provider, an appointment can be scheduled that identifies the patient as well as their site, equipment, codec, appointment type, and date and time of the appointment. The appointment also identifies any additional equipment that may be required at the patient site such as patient camera or electronic stethoscope. Clinical booking forms will be stored within the appointment for users who have the appropriate permissions to access.

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 browser:

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

The first time you access the system you will be asked to accept the Terms of Use. The 2nd time you will be prompted to change your password.

Set up a secure password using a minimum of 8 characters and 3 of these 4 criteria: uppercase character, lowercase character, number, special character (! * ? etc). If you need your password changed, contact the Service Desk at 204-940-8500 Option 4, Option 1 or toll-free 1-866-999-9698 Option 4, Option 1.

You will also be prompted to set up shortcuts on your home screen. Follow the onscreen instructions to create your shortcuts.

click to create your shortcuts

3.0 HOME PAGE

The home page is the initial screen that all users will see. The dashboard style display allows you to quickly view **New Meetings and Today's Meetings** that have been scheduled at your site(s).

open **Navigation menu**

access **Portal Profile** link

close menu

Navigation menu

home
appointments
information
site reports
meetings
meeting template

Home page

Group membership & Site access (for information purposes)

Click on the New Meetings or Today's Meeting titles to view more details (as shown below).

New Meetings and Today's Meetings

Clicking on the **New Meetings** link shown above opens a window that lists the new meetings scheduled at your site(s).

Meeting Name

ID	MEETING NAME	DESCRIPTION	SITE (ROOM / CODEC)	MEETING TIME	DAY OF WEEK	ACTION
1004	Cardiology		WPG-SBH Y-3003 – VCU3 (55262)	Monday, October 20, 2008 (08:00 – 09:30)	Monday	

4.0 MEETINGS

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

4.1 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 using can easily create an education or administrative event.

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

4.1.1   To create an Education/Administrative event:

1.   Click **meeting template** to expand the menu then select **APPLY.**
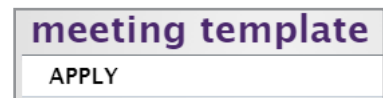
2.   Enter the name (or partial name) in the **Template Name** field then click **GO**.

Click **apply** beside the template you want to use. (Note: for Microsoft Teams meetings, select the **Teams Video Conference** template under the Site column.)

3.   Review the information on the **GENERAL INFO** tab.

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

Sites can add themselves up to noon the day prior, otherwise they need to call the MBT Schedulers to be added.

4. Click the **SCHEDULE** tab to enter the date and time of the event.

5. Click the **PARTICIPANT** tab and click the **add site** button. Select/double check the participating **Site(s), Room(s) and Codec(s)** to be included in the event and click **ADD**.

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

7. If all sites are available you will receive the message **"Meetings have been successfully created!"**

8. 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** under the **Action** column 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.

4.2 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, meeting name, and changing the date/time of the event. For multi-site events, the layout can also be changed, but must be done prior to the start of the session.

4.2.1 Change the layout for a multi-site event:

The default layout for multi-site events is the 1 + 7 layout (shown below) 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.   Click on the meeting to select it and on the **Meeting Detail** screen, click on the **change layout** button.

3.   Click on the radio button to select the preferred layout. Click **Change** and then **OK** on the pop-up message. Close the window to activate the change.

default layout
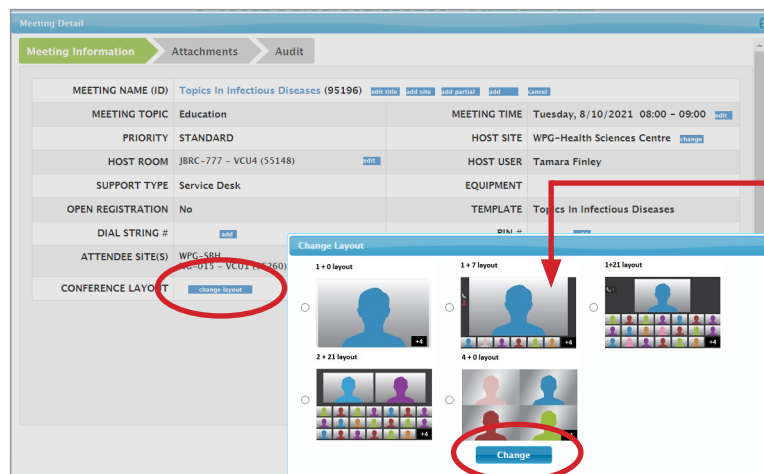
4.2.2 To edit the event title

1.   On the **Meeting Information** tab, click **edit title** in the **MEETING NAME** field, upate the name and click **Save.**

4.2.3 To add an attendee site(s):

1.   Click on **meetings** to expand the menu and use either **CALENDAR** or **MEETING SEARCH** and click on the meeting to select it.

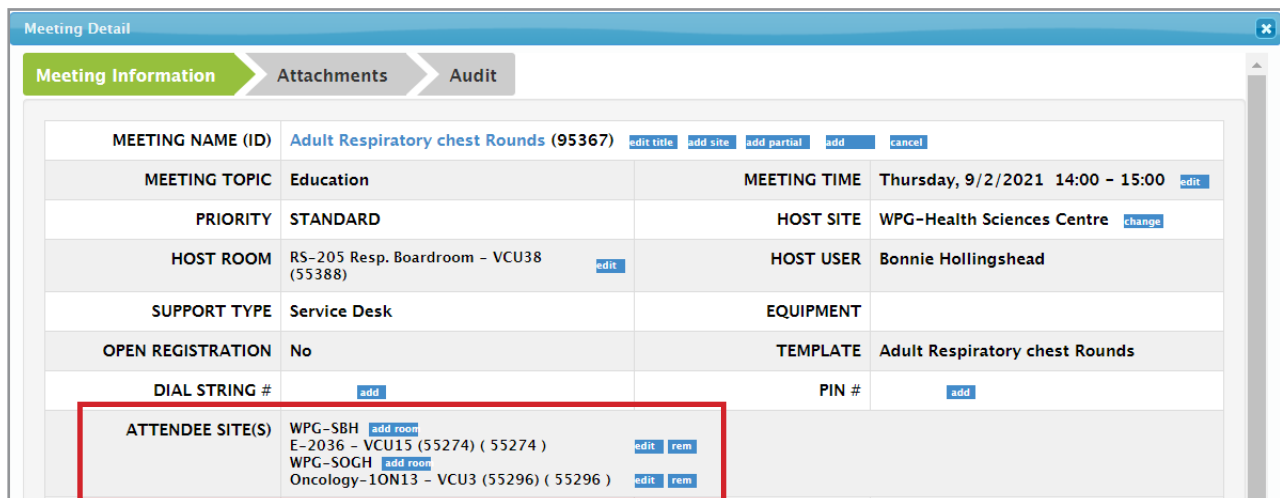2.   On the **Meeting Information** tab, click **add site** on the **MEETING NAME** line.
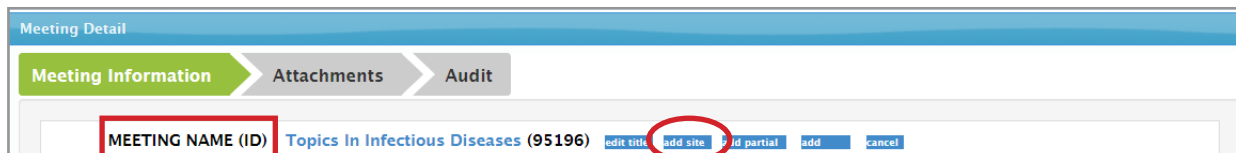
3.   When the **Add Site** window opens, select the **ATTENDEE SITE, ATTENDEE ROOM**, and the **CODEC** from the drop down lists then click **ADD**.
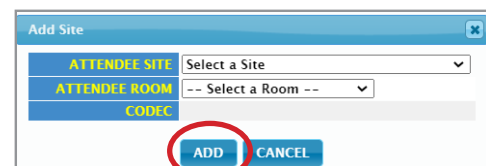
4.   If any of the options selected above are unavailable, you will receive a message similar to this **"The selected equipment are not available: VCU1."** Click **OK** to close and then change the options as necessary.

5.   If everything is available you will receive the message **"Adding additional sites successfully!"**. Click **OK** to complete.

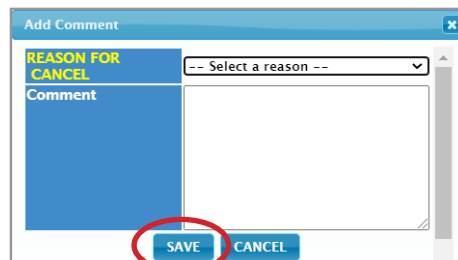6.   Follow steps 2-5 to add additional sites to the event.

4.2.4   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** and click on the meeting to select it.

2.   On the **Meeting Information** tab, click **rem** beside the site you want to remove from the meeting under the **ATTENDEE SITE(S)** section.

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.

4.2.5   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.   On the **Meeting Information** tab, click **edit** beside the **MEETING TIME** field.

3. Select the new date and/or time and click **SEARCH.**

   Click **CHECK ATTENDEE** sites to confirm all are available and then click **CHANGE** at the bottom of the screen.

4. Click **OK** on these two pop-ups: **"Are you sure you want to change the meeting schedule?"** and **"The meeting schedule has been updated!"** to complete the change.

4.2.6   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 **site/room/codec** from the drop-downs 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?** box if you want them to still be included in the event.

5. Click **OK** when prompted to these pop-ups: "**Are you sure you want to change the meeting host site to the selected site?**" and **The host site has been changed successfully!**".

4.2.7 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** and click the meeting to open it.

> If it is a recurring meeting, you will be prompted to select either the occurence or the series.

2. Click **cancel** on the **MEETING NAME** line.

3. Click **OK** to confirm you want to cancel the whole meeting.

4. Enter the **REASON FOR CANCELLATION,** click **SAVE** and then **OK** on the pop-up to complete the cancellation.

4.3 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.
Click site reports and WHITEBOARD. Enter the search criteria and click GO.

If you have missed the connection for a multi-site event, you will find the self-serve connection information here.

APPENDIX A - EVENTS NOT APPROPRIATE FOR SELF SCHEDULING

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

- Billable events
- Events involving Out of Province Connections
- Events involving Out of Network Connections
- Events requiring Partial Bookings *(unless you are a site who has been*
-    *trained on partial bookings, such as an open registration event)*
- i.e. only attending part of a scheduled event
- Non-Templated events *(clerks can call the MBT Schedulers to have a*
-    *template created or edited)*
- Events scheduled outside of regular operating hours (Mon-Thurs 730-2100 and Friday 730-1700)
- For same day events to be created past the noon cutoff, always contact the MBT Schedulers
- Clinical Multi-Site *(self-schedulers can call the MBT Schedulers to add the 3rd site,* or add the site on your own if you have been trained)
- Televisitation