

iScheduler User Guide

Self-Scheduling for 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

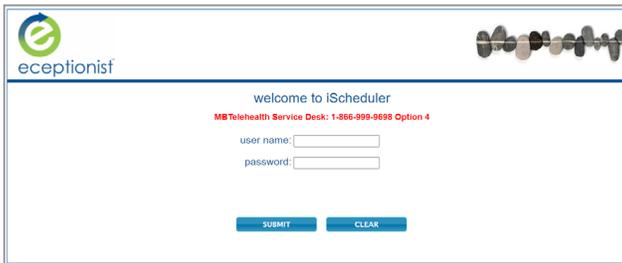
To access the iScheduler system, click the following link or copy and paste it into your browser:

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.

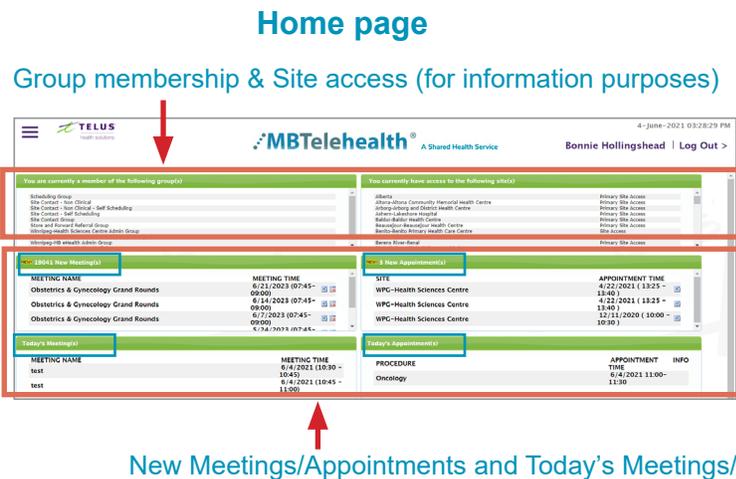
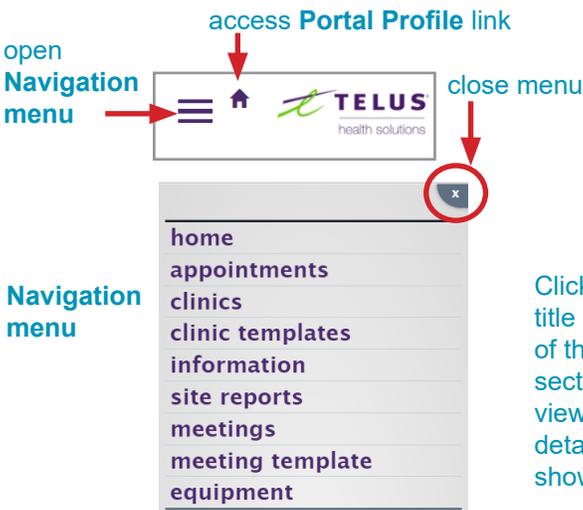
Set up a secure password using a minimum of 8 characters and 3 of these 4 criteria: uppercase character, lowercase character, number, special character (! * ? etc). If you need your password changed, contact the Service Desk at 204-940-8500 Option 4, Option 1 or toll-free 1-866-999-9698 Option 4, Option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

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



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/New Appointments** and **Today's Meetings/Today's Appointments** that have been scheduled at your site(s).



Clicking on the **New Appointments** or **New Meetings** links shown above opens a window that lists the details.

A List of Virtual Appointments						
ID	APPOINTMENT TIME	PROCEDURE	SITE	ROOM / CODEC	ACTION	INFO
631481	8/23/2023 (15:00 - 15:30)	Respirology	WPG-Health Sciences Centre	AD-206 / VCU45 (55184)	<input checked="" type="checkbox"/>	

4.0 APPOINTMENTS AND CLINICS

Clicking **appointments** or **clinics** expands the menus and provides access to clinical event information and functionality. You are able to create, view, search, edit and report on clinical events using the functions within these menus.



4.1 Clinical Event Entry

A clinical event includes a clinic that is created to identify the provider availability, specialty and type of consult as well as an appointment which is created to identify when and where the patient will attend. Clinical events can be entered individually or in groups.



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 a clinical event:

1. Click on **clinic templates** to expand the menu, then select **APPLY**.



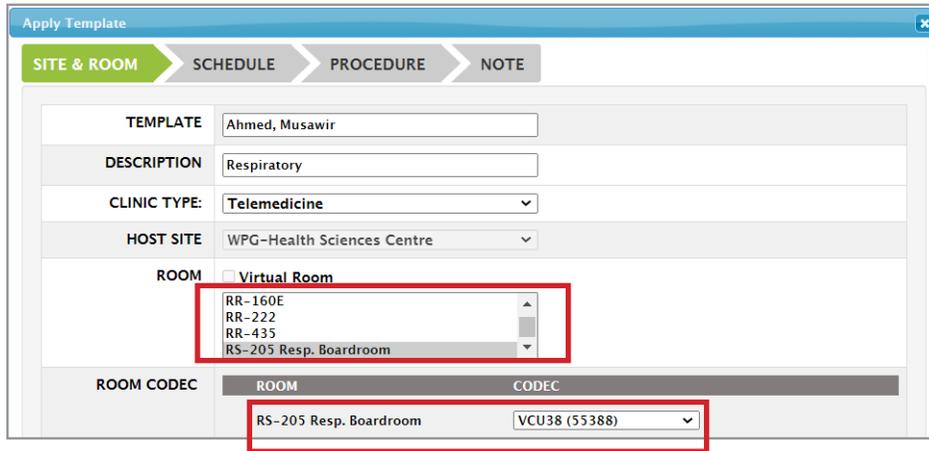
2. Enter the provider's last name in the **Template field**; this will narrow down the search to all providers with that last name. Click **GO**, then select the appropriate template and click **Apply**.

Found: 9 Displaying 1-9 previous | 1 | next

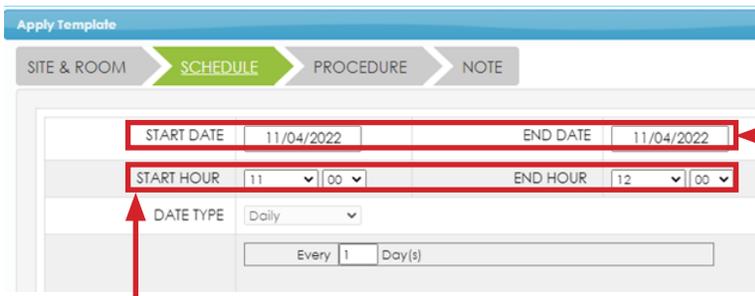
NAME	DESCRIPTION	SITE	LAST APPLIED DATE	ACTION
Ahmed, AG	Psychiatry - Nunavut	Nunavut (Eastern Time)		<input type="button" value="apply"/> <input type="button" value="recurring"/> <input type="button" value="edit"/> <input type="button" value="copy"/> <input type="button" value="delete"/>
Ahmed, Ahmed	Peds-General Practitioner	Thompson-TGH	5/19/2021 11:09:41 AM	<input type="button" value="apply"/> <input type="button" value="recurring"/> <input type="button" value="edit"/> <input type="button" value="copy"/> <input type="button" value="delete"/>
Ahmed, Ekhlas	Addictions Counsellor	Thompson-AFM		<input type="button" value="apply"/> <input type="button" value="recurring"/> <input type="button" value="edit"/> <input type="button" value="copy"/> <input type="button" value="delete"/>
Ahmed, Musawir	Respiratory	WPG-Health Sciences Centre		<input type="button" value="apply"/> <input type="button" value="recurring"/> <input type="button" value="edit"/> <input type="button" value="copy"/> <input type="button" value="delete"/>

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- If you are able to apply the template, once the template wizard opens, review the information on the **SITE & ROOM** tab to ensure it is accurate and make modifications as necessary.



- Click on the **SCHEDULE** tab and select the start date, end date, start hour and end hour (this example is showing a one hour clinic).

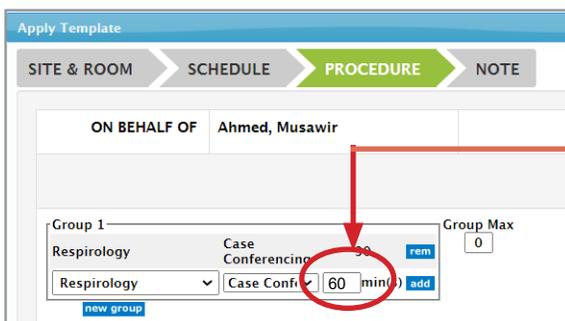


Start/End Date: set these the same unless you are booking a recurring event.

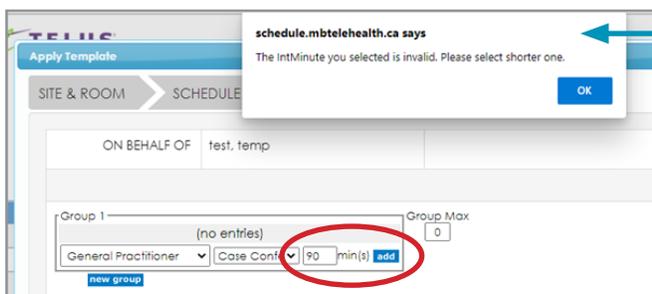
The system automatically sets the End Date 2 days after the Start Date so you will need to adjust it as required.

You must book a separate clinic for each appointment during the day, unless you are using Connection Dialer. In that instance, you can book the entire day as one clinic as the room is not shared.

- Click on the **PROCEDURE** tab and double check that the procedure, visit type and time are accurate. Modify if necessary.



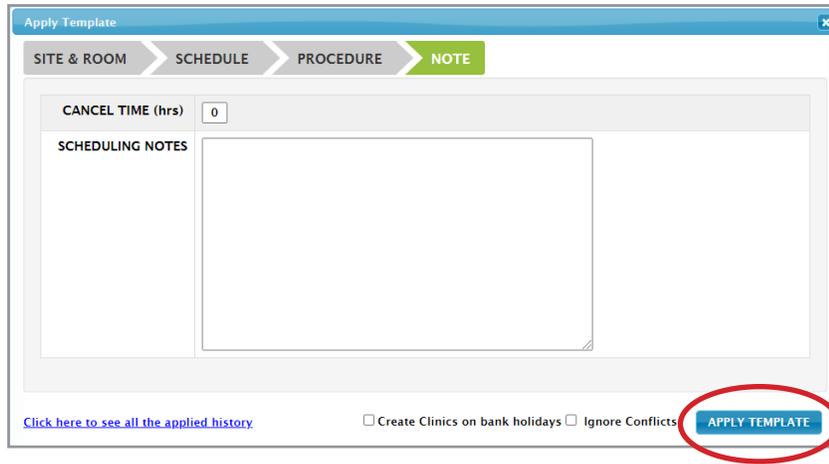
The time (in mins) indicates how long each appointment is and should match the clinic length on the SCHEDULE tab (you can a 60 minute clinic for one patient or two 30 minute appointments within that clinic).



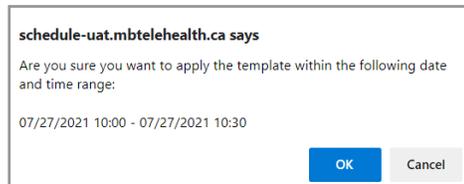
! If you enter a duration longer than the clinic duration, you'll get this message. In this example, our clinic is 1 hour (60 mins) and we've entered 90 mins.

Delete the 90 mins and enter 60, and then click **add**.

- Click on the **NOTE** tab then click **APPLY TEMPLATE**. (Do not type any information on the Note tab as this information does not show up on any reports.)

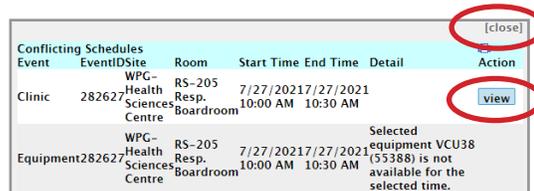


- Review the information in the pop up message then click **OK** to apply the template.



- If the room and codec are available, you will receive a message stating **'The clinics have been successfully created!'**. Proceed to step 11
- If the room and codec 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.



-  If you created the event that is in conflict you will be able to modify either event to remove the conflict.

- Once your clinic has been successfully scheduled, click **clinics** to expand the menu then select **VIEW BY DAY - CLINIC**.

clinics

VIEW BY DAY - CLINIC

CLINIC LIST

- Click the **CONSULTANT** dropdown and start typing the name of the applicable Consultant, click to select it and then **GO**. Click on the applicable clinic to select it.

DATE/TIME	CLINIC TYPE	PROCEDURE	CONSULTANT	TYPE	ROOM
2/16/2023 13:30 - 13:45	Telemedicine (Bishop, Mary - Vi...)	Gastroenterology	Bishop Mary	Follow Up	Mary Bishop Virtual Visit Provider Portal
2/16/2023 13:50 - 14:10	Telemedicine (Bishop, Mary - Vi...)	Gastroenterology	Bishop Mary	Case Conferencing	Mary Bishop Virtual Visit Provider Portal
2/16/2023 14:10 - 14:30	Telemedicine (Bishop, Mary - Vi...)	Gastroenterology	Bishop Mary	Case Conferencing	Mary Bishop Virtual Visit Provider Portal
2/16/2023 14:30 - 14:45	Telemedicine (Bishop, Mary - Vi...)	Gastroenterology	Bishop Mary	Follow Up	Mary Bishop Virtual Visit Provider Portal
2/16/2023 14:50 - 15:10	Telemedicine (Bishop, Mary - Vi...)	Gastroenterology	Bishop Mary	Case Conferencing	Mary Bishop Virtual Visit Provider Portal

- Once the clinic page opens, double check the information then scroll to the bottom and click on the **SCHEDULE APPOINTMENT** button to open the **Schedule Appointment** window.

CLINIC GROUPS

Group 1

Respirology Case Conferencing 30 min

Respirology Case Confr (min(s)) Add

new group

CANCEL TIME (hrs) 0

SCHEDULING NOTES

SAVE DELETE CHANGE SCHEDULE **SCHEDULE APPOINTMENT**

- Click on the **SELECT PATIENT** button and **Search** for your patient using their Last Name or PHIN, if found, check demographics to ensure they match (confirm at least two demographics, use PHIN for Manitoba residents) and click to select the name.

If the patient is not listed, click on **New Patient** to add the patient into the system.

! Enter the information using the formats shown below. Red indicates mandatory fields.

- Do not use.
- Use upper and lowercase (i.e., Jane Smith).
- Use the calendar to ensure the format is correct.
- Select applicable.
- Use applicable field (CR# field is used by Cancercare).
- Do not use.
- Select site.
- Optional, for clinic purposes, not needed by MBT. Use upper and lowercase.

- Upper and lowercase (i.e., Selkirk).
- Abbreviation, all caps (i.e., MB).
- Do not use.
- Uppercase with space (i.e., R2R 2R2).
- Do not use.
- Optional, for clinic purposes, not needed by MBT. Use upper and lowercase.
- Use dashes, no bracket for area code (i.e., 204-555-1212).
- Do not use.

14. Select the **REQUEST SITE** by starting to type the site name in the field and then selecting from the options provided in the drop down menu.

15. Select the **REQUEST ROOM** and **ROOM CODEC** from the drop down menus. (see room definitions below)

If additional equipment (i.e. Stethoscope, Patient Camera etc.) is required, click on the **EQUIPMENT** button and select from the listing. Click **ADD** to attach the equipment to the event.

! Always select the 1st room from the list and if that equipment is booked you will receive a conflict. At that point you can go back and select the next room on the list. Do not select any items with the prefix XXX as this is just a placeholder.

Contact the MBT Schedulers if you require assistance.

Room Definitions and Prefixes	
Clinical Rooms: rooms used for clinical events only	
Prefix	
CLIN	All clinical other than those listed below
CLIN Ca	CancerCare Manitoba clinical
CLIN Renal	Renal clinical rooms
CLIN Nursery Only	Neonatology clinical rooms
Meeting Rooms: used for non-clinical events only such as meeting, education or admin	
Prefix	
MTG SM	Small meeting room <10 people
MTG LG	Large meeting room >10 people
Hybrid Rooms: used for both clinical and non-clinical events	
Prefix	
HYBRID	
MyMBT: used for both clinical and non-clinical events using an individual's own computer or mobile device	
Prefix	
User's name	

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16. Click **SEARCH** to find availability at the request (patient) site, and click on the desired time from the options listed at the bottom of the screen.

Clinic Detail

Schedule Appointment

SELECT PATIENT

Virden Patient (Age: 42 yrs) **SELECT PATIENT**

SPECIFY REQUEST SITE INFO

REQUEST SITE: Brandon-BRHC REQUEST ROOM: CLIN1-Clinics Exam Room 3 SCHEDULED BY: Hollingshead, Bonnie

EQUIPMENT: **EQUIPMENT** ROOM CODEC: VCU4 (56018)

SPECIFY APPOINTMENT INFO

FROM: 7/29/2021 TO: 7/29/2021 HOST SITE: WPG-Health Sciences Centre PROCEDURE: Respiriology

START: 10:00 END: 10:30 ROOM: RS-205 Resp. Boardroom CONSULTANT: Ahmed, Musawir

DAY: Any Day APPT TYPE: Any Type RESOURCES: **SEARCH**

DATE/TIME	HOST SITE	ROOM	APPT TYPE	PROCEDURE	CONSULTANT	DAY
7/29/2021, 10:00 AM - 10:30 AM	WPG-Health Sciences Centre	RS-205 Resp. Boardroom	Case Conferencing	Respirology	Musawir Ahmed	Thursday

Click to select the desired appointment.



If there are no appointment times available, try changing the request room or codec and clicking **SEARCH** again to determine if there is anything available at that site. If still unavailable you may have to reschedule to another date/time.

17. On the **Clinic Detail** page, add any necessary comments to the **ADDITIONAL COMMENT** field, ex: mother coming with patient, RIS image received, height/weight/BP on arrival.

Click on **BOOK APPOINTMENT** ensuring that “With Notification?” is checked to complete the booking. You will receive a message that the “**Appointment has been successfully booked**”.

Clinic Detail

Book Respiriology Case Conferencing Telemedicine Appointment
Patient, Virden Born 4/18/1979 (42 yrs)

APPOINTMENT INFO SURVEY ATTACHMENTS

DATE/TIME	Case Conferencing, Thursday, July 29, 2021 (10:00 - 10:30)	PRIORITY	<input checked="" type="radio"/> Standard <input type="radio"/> Urgent
REQUEST SITE INFORMATION	Brandon-BRHC (CLIN1-Clinics Exam Room 3)	REQUEST ROOM CODEC	VCU4 (56018)
REQUEST SITE EQUIPMENT		SCHEDULED BY	Bonnie Hollingshead
HOST SITE INFORMATION	WPG-Health Sciences Centre (RS-205 Resp. Boardroom)	HOST ROOM CODEC	VCU38 (55388)
HOST SITE EQUIPMENT		PROCEDURE	Respirology
CONSULTANT	Musawir Ahmed		
REASON FOR APPOINTMENT	<input type="text"/>	ADDITIONAL COMMENT	<input type="text"/>
EMAIL NOTIFICATION	7/29/2021 10:00:00 AM 1 st REMINDER <input type="checkbox"/> DAYS PRIOR 2 nd REMINDER <input type="checkbox"/> HOURS PRIOR		
<input checked="" type="checkbox"/> BOOK APPOINTMENT <input checked="" type="checkbox"/> With Notification? <input type="checkbox"/> E-mail Patient Confirmation?			

Only people with access to iScheduler are able to view the comments online, however, the information will appear on the printed White Board report so **DO NOT** record any private information in this section including any identifying information about the patient.

This option is not used; it is disabled in our system.

4.2 Telehealth Notification Letters

It is the provider's (or designates) responsibility to notify the patient of any telehealth appointments regardless of whether they are within the MBTelehealth (MBT) Network or not.

It is recommended that the Telehealth Notification Letter(s) be sent by mail to all patients whose appointments are scheduled greater than one week in advance of the appointment date. For patients whose appointments are scheduled within a week of the appointment date, a telephone call is recommended to confirm appointment details. If the patient is being referred from a nursing station, notification of the appointment details should be communicated to the nursing station directly. The Nursing Station will then ensure the patient is advised of their appointment details.

4.2.1 To print the Telehealth Notification Letter:

1. Find the appointment you want to print the letter for using **APPT SEARCH** or **VIEW BY DAY**.
2. On the **Appointment Details** page, click on **Letters** and then select the **Telehealth Notification Letter** to view the notification letter in word format.
3. The **Telehealth Notification Letter** can now be printed at your convenience

The screenshot shows the 'Appointment Detail' page for a patient named Virden. The page has tabs for 'APPOINTMENT INFO', 'ATTACHMENTS', 'SURVEY', and 'AUDIT'. The 'APPOINTMENT INFO' tab is active. Below the tabs, there is a 'PATIENT INFO' section with fields for Patient Id (73140), Last Name (Patient), First Name (Virden), Dob (4/18/1979), and Phin# (658456321). There is also a 'Patient Address' section. Below that is an 'APPOINTMENT INFO' section with fields for Id (630867), Date/time (Thursday, July 29, 2021), and Request Site Information. At the bottom of the page, there are several buttons: 'LETTERS', 'ADD INFO', 'SUBMIT', and 'CLEAR'. The 'LETTERS' button is circled in red. A dropdown menu is open over the 'LETTERS' button, showing a search bar and a list of options. The option 'Telehealth Notification Letter' is selected and circled in red.

4.2.2 Printing the Ontario Patient Letter (For Ontario Patients only):

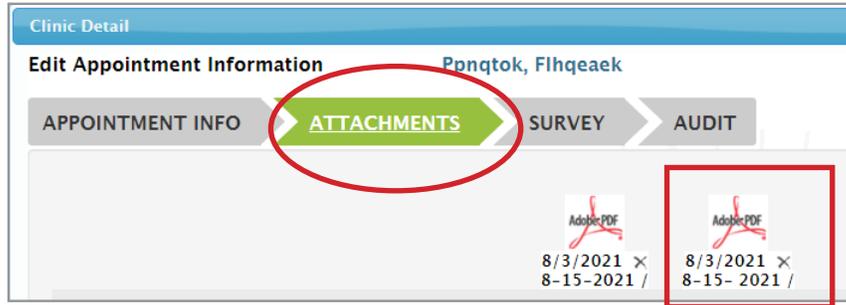
When the patient site is located in Ontario, there will be an additional Patient Notification letter generated by the Ontario Telemedicine Network (OTN) to advise the patient of where their Telemedicine Clinic is located. It is recommended that this letter be printed and sent to the patient with the MBT Patient Notification letter or

! Appointment times on all OTN patient confirmations and letters are in Eastern Standard Time. However, please be mindful of the time you are telling your clients to arrive, as most appointments are based on the time they are scheduled in Manitoba (Central Standard Time).

If you need assistance with any out of Province Confirmations, call the MBT Schedulers.

To Print the OTN Patient Notification Letter/Access Ontario Patient Site Info:

1. Find the appointment you want to print the letter for using **APPT SEARCH** or **VIEW BY DAY**.
2. Once appointments details are displayed, click on **Attachments** and click on the second of the two Adobe PDF Icons.



! You will require Adobe Acrobat reader to view PDF files and/or may need your local IT to set up your computer to view TIF files in order to see the OTN patient letter. Contact your local IT if you have any issues viewing these attachments.

3. This will open the OTN appointment confirmation fax, one page of which will include the OTN Patient Notification Letter. It can now be printed at your convenience.

! When cancelling an appointment, both the appointment and the clinic must be cancelled to ensure the resources will be available for others to use in another event.

4.3 Clinic and Appointment Modifications

Self-schedulers are able to modify events they have created. Date, Time, Room and Codecs can be changed following the instructions listed below.

4.3.1 To cancel an appointment:

! Do not cancel out of province events; you must call the MBT Schedulers to make any changes to these events.

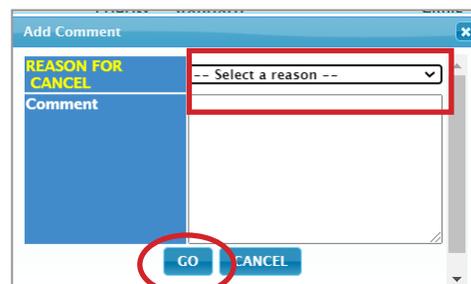
1. Find the appointment you want to cancel using **APPT SEARCH** or **VIEW BY DAY**.

appointments
CREATE NEW
CALENDAR VIEW
VIEW BY DAY
APPT SEARCH



3. Select the **Reason for Cancel** and click **GO**.

! Only use Client/Participant, Provider/ Organizer or Other for cancellation reasons.



- To cancel the clinic, click **clinics** to expand the menu and **VIEW BY DAY**, then find the clinic you want to cancel (Section 3.1 Steps 11 & 12) and click to open it.
- Scroll to the bottom of the **Clinic Detail** screen and click **DELETE** and click **OK** on the pop-up to delete the clinic. Enter a comment for deleting and click GO.

 **The appointment must be cancelled first; otherwise you will receive the message advising that there is a pending appointment that must be cancelled first.**

4.3.2 To change the date/time of an appointment:

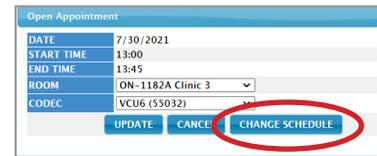
Appointment date/time changes are completed by making changes to clinics and then following the prompts to ensure the appointment carries over to the new clinic date/time.

- Click **clinics** to expand the menu. Click **VIEW BY DAY** then find and select the clinic you want to modify (Section 3.1 Steps 11 & 12).

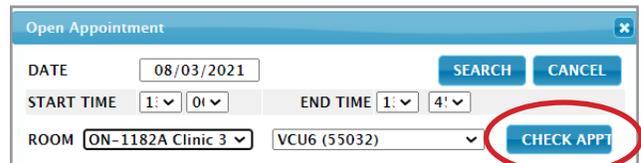
- Scroll to the bottom of the Clinic Detail page and click **CHANGE SCHEDULE**.



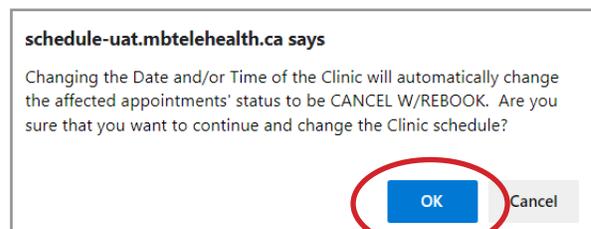
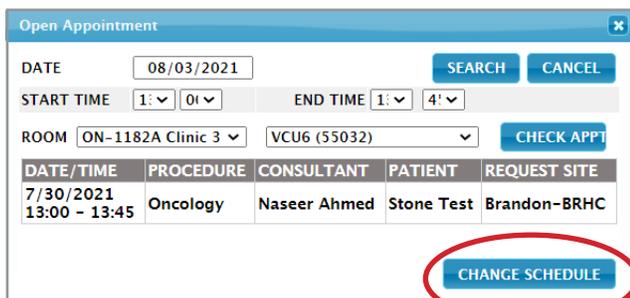
- When the pop up window opens, click **CHANGE SCHEDULE** again.



- Enter the new date/time in the appropriate field then click **SEARCH**. Enter the room and codec then click **CHECK APPT** and click **OK** when the pop up opens indicating that an affected appointment has been found.

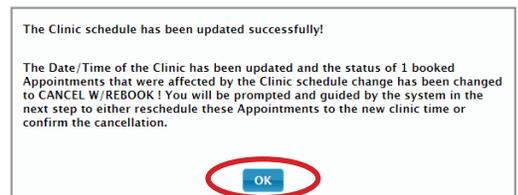


- Click **CHANGE SCHEDULE** then click **OK** when the pop up opens indicating that the appointment status will change to **CANCEL W/REBOOK**.



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6. Click **OK** when the pop up opens indicating that your **'Clinic schedule has been updated successfully!'**



7. Click the **blue checkmark** icon under the **ACTION** column to reschedule the appointment.

DATE/TIME	PROCEDURE	CONSULTANT	PATIENT	REQUEST SITE	ACTION
7/30/2021 13:00 - 13:45	Oncology	Naseer Ahmed	Stone Test	Brandon- BRHC	<input checked="" type="checkbox"/>

8. Click **OK** when prompted to rebook the appointment.

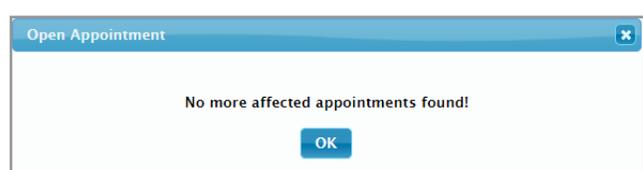
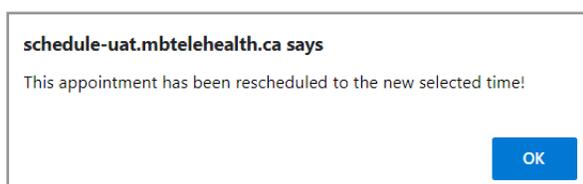
9. Select a **REASON FOR RESCHEDULE** from the drop down list and enter a Comment if required then click **GO**.

10. Click on the desired appointment in the **AVAILABLE APPOINTMENTS** listing and click **OK** when prompted to rebook the appointment to the selected time.

APPOINTMENT DETAIL			
PATIENT	Stone Test		
REQUEST SITE	Brandon-BRHC	REQUEST ROOM	CLIN1-Clinics Exam Room 3
HOST ROOM	WPG-CCMB MacCharles	HOST ROOM	ON-1182A Clinic 3
CONSULTANT	Naseer Ahmed	PROCEDURE/APPT TYPE	Oncology/Follow Up
AVAILABLE APPOINTMENTS			
8/3/2021, 1:00 PM - 1:45 PM	Naseer Ahmed	Tuesday	



11. Click **OK** when the pop up opens indicating the appointment has been successfully changed and click **OK** again when the no more affected appointments message appears.



4.4 Clinical Block Booking Entry

A Block Booking is created when a need is identified to block off specific sites/rooms for clinical events where the patients are currently unknown (i.e. a clinic that is scheduled every Wednesday afternoon where the patients are unknown until a month prior). Entering a clinical block booking allows the user to reserve video conference equipment until all of the appointment details are available. For more information on what types of events are appropriate, contact the MBT Schedulers or your regional Digital Services Facilitator.

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 (*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