iScheduler

Site Contact Non-Clinical User Guide

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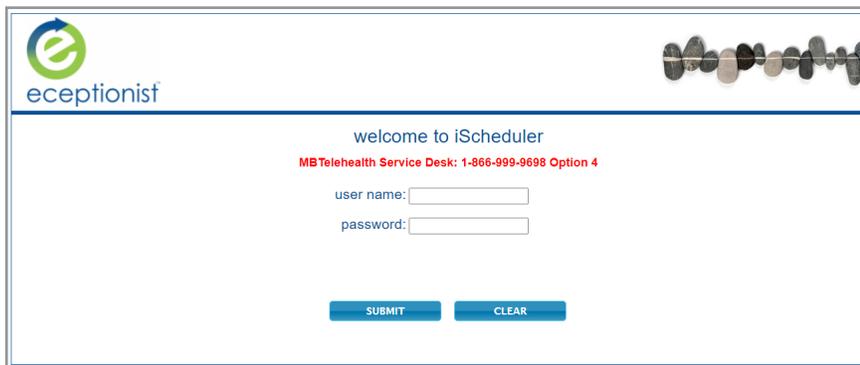
You will also be prompted to set up shortcuts on your home screen. Follow the onscreen instructions to create your shortcuts.

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 Meeting(s)** and **New Appointment(s)** that have been scheduled at your site(s) as well as **Today's Meeting(s)** and **Today's Appointment(s)**.

New Meetings/Appointments and Today's Meetings/Appointments

3.1 Group Membership and Site Access

The group membership and site access displays are permission based and may be used by the MBT service desk to determine if you have been assigned the correct permissions or not. For the most part, these are there for information purposes only.

3.2 New Meetings

Clicking on the **New Meetings** link opens a window that lists the new meetings scheduled at your site(s). From this window, you are able to **Accept** or **Reject** the meeting or click on the **Meeting Name** to view the **Meeting Information Screen**.

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	

3.2.1 Accepting the meeting

To accept the meeting, click on the **Accept** meeting icon [icon]. This will remove the meeting from the list.

Note: If the meeting has been scheduled in the wrong room or on the wrong equipment, you can edit the room and/or codec prior to accepting the event following the instructions for editing meetings (section 6.5).

3.2.2 Rejecting the meeting

MBT asks that users contact the scheduling desk after rejecting an event to ensure that all necessary people are aware of the cancellation.

To reject the meeting, click on the **Reject** Meeting Icon [icon].   When you reject the meeting, you will be prompted to provide a reason so that the meeting creator and the affected site are notified as to why the meeting was rejected.

   Note: Site contacts will be responsible for reviewing new requests daily (working days only) and accept or reject as soon as possible (no later than 48 hours before the event).

3.2.3 Meeting Detail and Information Screens

The Meeting Detail screens contain the information regarding the scheduled event and are accessed by clicking on the **Meeting Name** in the **New Meetings** listing or through the **Calendar** or **Meeting Search** (see section 5.0) functions. The user is able to review the information and change the room or codec the meeting is scheduled in as well as change the layout (layout is to be determined by the host/presenter and must be changed prior to the session). The user is also able to remove their site from the event if they are unable to attend.

Click the meeting name to open the **Meeting Detail** window.

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	☑ 🗙

Meeting Name (ID) (click to view additional meeting information)

change layout   **edit** (edit room/codec   **rem** (remove site

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The **Survey Responses** and **Comments** tabs will appear <u>after</u> you have clicked on the Meeting Name link on the Meeting Information tab as shown below.

**Meeting Name (ID)**
(click to view additional meeting information)

Meeting Detail		
Meeting Information	**Attachments**	**Audit**
MEETING NAME (ID)	Test (95285)	edit title add site add partial add
MEETING TOPIC	Test Call	
PRIORITY	URGENT	
HOST ROOM	CLIN1-Cast Room - VCU1 (56756)	edit

Click the **Comments** tab to access site contact information.

Meeting Detail					
Meeting Information	Attachments	Survey Responses	Comments	Audit	

MEETING NAME (ID)	Test (95285)	DESCRIPTION	Template Test
HOST MEETING TIME	Monday, 6/7/2021 09:00 – 10:00	MEETING DURATION	60 (Minutes)
PRIORITY	Urgent		
HOST SITE	Arborg–Arborg and District Health Centre	HOST ROOM	CLIN1-Cast Room
CODEC	VCU1 (56756)	HOST SITE EQUIPMENT	Patient Camera
SUPPORT TYPE	Equipment Delivery	TEMPLATE USED	Test
OPEN REGISTRATION	Yes	ATTENDEE SITE(S)	Altona–Altona Community Memorial Health Centre (CLIN1–Exam Room (Service Desk)) VCU1 (56751)

3.3 Today's Meeting(s) and Appointment(s)

Today's Meetings and Appointments provides a quick overview of events that are scheduled to take place today. Clicking on any of the events will take the user to either the Meeting Calendar or Appointment View by Day screen so they can easily access additional information about the event.

Click on the **meeting** to see the calendar view as shown below.

Click on an **appointment** to see the apointments by day view as shown below.

4.0 MEETINGS

Clicking **meetings** in the navigation menu expands the menu and provides access to information regarding meetings scheduled at your site(s). You are able to register, view, search, and edit events using the functions within this menu.
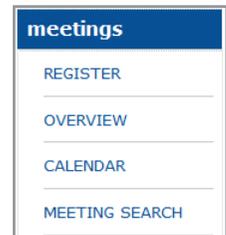
4.1 Register

Clicking **REGISTER** in the **Meetings** menu allows users with appropriate permissions to view and sign up for events that have been identified as **Open Registration** events.

To Sign Up for an Open Registration event:

1. Click on the **REGISTER** link in the **meetings** menu to open the **List of Topics** available for open registration then click the appropriate **MEETING TOPIC.**

Note: We will not be using the subscription function as we already have a notification process in place.

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2. Click **Sign Up** on the desired topic in the **List of Meetings to Sign up.**

3. On the **Meeting Participant Sign up Page,** input your **Site**, **Room**, and **Codec** then click **Register**.

4. Enter **Attendee** Information when prompted (Site, Attendee Name, and Contact Information) then click **Submit.**

4.2 Overview

Clicking **OVERVIEW** in the **Meetings** menu provides users the ability to search for availability at sites and rooms other than their own. Although the Overview link appears in the Meetings Menu, it reviews both clinical and non-clinical events to determine the availability of a site/room.

To use Overview:

1. Click **OVERVIEW** in **meetings** menu; select **Day Overview** and then click **Continue** (do not use Available Day Overview as it is not user friendly).

2. Enter the **Date.**

   Enter **Hosting Site** (your own site).

   Enter **Participating Site** (site/s you want to see availability for).

3. Scroll to the bottom of the screen and click **Continue.**

4. The **Schedule** Overview will open for your selected sites. You can further define the search by modifying the **Starthour**, **Endhour** and **Duration** and clicking **Get Schedule.**

   Note: The **Schedule Overview** shows all rooms at a site that are available (identified in yellow) but does not identify how many video conference units are available for use. Sites may have multiple rooms but only a few video conference units (mobile and/or fixed); therefore even if a room is available there may not be any equipment available to book. For this reason, the overview should only be used if you are aware of all of the equipment and rooms that are used at your site and any other site that you are booking at.

   Note: This is to be used as a reference only and users can contact the MBT schedulers at the Service Desk at: **204-940-8500 Option 4 or toll-free 1-866-999-9698 Option 4.**

5. If you do not find a suitable time, change the **Date** and click **Get Schedule** again to view alternative options.

   Note: Clicking on an available room will begin the scheduling process. You **DO NOT** have the permissions to complete this task. If you do click available room by accident click **Close** in the pop up window to return to the overview screen.

4.3 Calendar

Clicking **CALENDAR** in the **meetings** menu allows the user to view all meetings scheduled at their site(s) for a specified week.

To use the Calendar:

1. Click in the date field and select a date from the pop up calendar.

2. Select the desired site/room (or leave as is to select all) from the drop down list then click **GO.**

3. Once the **Site Meeting Weekly Schedule** populates, click on the **Meeting Name** (blue and underlined) to view the **Meeting Detail Screen** (shown in Section 3.2.3).

Note: Some meetings will have a recurring symbol ⟳ beside the meeting time. After clicking the **Meeting Name** for meetings with this symbol, users will see a pop up window that asks the user if they will be updating this meeting or the entire series. This message will appear for all meetings and can be ignored unless you are planning to make a change to one of more events.

You will notice that both Scheduled and Cancelled events are displayed in the **Site Meeting Weekly Schedule**. Cancelled events are indicated by Grey Text and are there to provide a complete view of events that have been scheduled at the site. Clicking on a cancelled event allows a user to view event information as well as the date it was cancelled and the reason for cancellation.

4.4 Meeting Search

Clicking **MEETING SEARCH** in the **meetings** menu allows the user to search for meetings based on defined criteria.

To use Meeting Search:

1. Enter information into the **SEARCH FILTER** fields (shown below) then click **GO** to find meetings that fit those criteria.

2. Once the **Meeting Event List** populates, click the **SERIES ID/MEETING ID** to view the **Meeting Detail Screen** (shown in Section 3.2.3).

    Note: Some meetings will have a recurring symbol 🔄 beside the meeting time. After clicking the **Meeting Name** for meetings with this symbol, users will see a pop up window that asks the user if they will be updating this meeting or the entire series.   This message will appear for all meetings and can be ignored unless you are planning to make a change to one of more events.

You will notice that both Scheduled and Cancelled events are displayed in the **Site Meeting Weekly Schedule**. Cancelled events are indicated by Grey Text and are there to provide a complete view of events that have been scheduled at the site. Clicking on a cancelled event allows a user to view event information as well as the date it was cancelled and the reason for cancellation.

4.5 Editing Meetings

Users with Site Contact permissions are able to modify the room and codec used for meetings scheduled at their site(s). The host/presenter also has the option to change the layout for a multi-site session, but it must be changed prior to the start of the event.

To modify rooms and equipment for an attendee site.

1. Find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH**.

2. Click on the **Series/Meeting ID** link to open the **Meeting Detail** screen.

3. Click the **edit** button **edit** beside the **Attendee Site** you want to modify
    (you will only be able to change sites you have permission for).

4. In the pop up window, select the new room/codec from the drop down lists then click **Update**. The
    room/codec change is now complete.
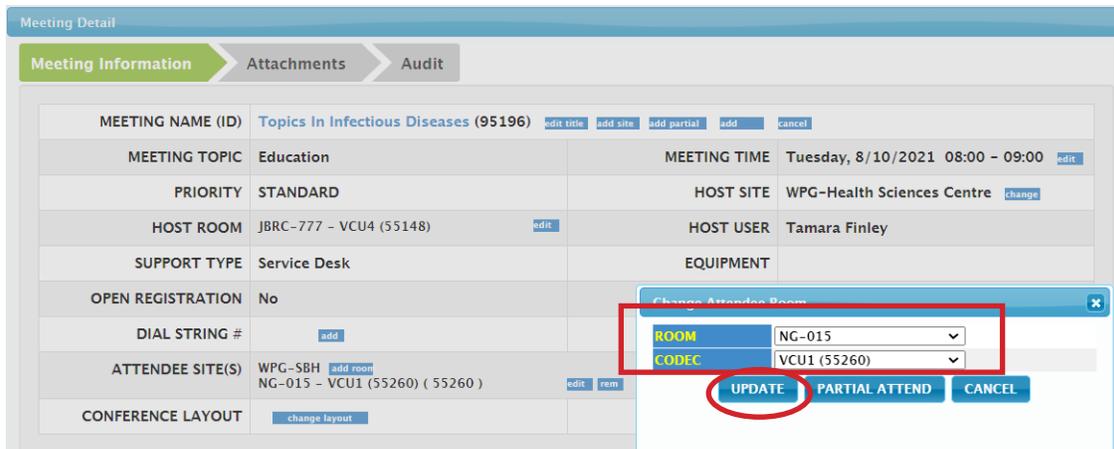
To modify rooms and equipment for a host site:

1. Find the meeting you want to modify using **CALENDAR** or **MEETING SEARCH.**

2. Open the Meeting Detail Screen.

3. Click the **edit** button **edit** on the **Host Room** line. (you will only see this if you have permissions for
    that site).

4. In the pop up window, select the new room/codec from the drop down lists then click **Update**. The
    room/codec change is now complete.

5. Click **Change Layout**, if required, to change the layout prior to the session. Click on the applicable
    radio button and click **Change**. (Note: The default is 1+7 layout; and the layout option is only to
    be used by the host/presenter.)
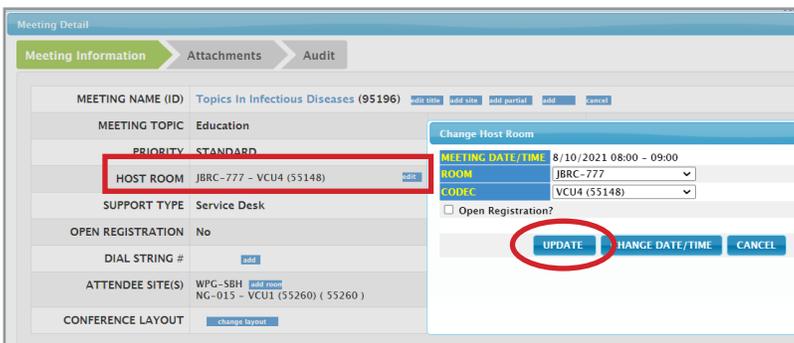
5.0 SITE REPORTS

Clicking site reports in the navigation menu expands the menu and provides access to various reporting options for site activities.

site reports
- WHITEBOARD
- UTILIZATION
- ACTIVITY VIEW

5.1 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.

Appointment Whiteboard Report

Total Number of Events Between Monday, June 5, 2023 and Friday, August 4, 2023: 9

TEAMS- GIM Section Mtg 101808 Dial in # 1162726814

	START: 6/8/2023 12:00:00 PM	End: 6/8/2023 1:15:00 PM	Meeting

If you are registered for this multi-site telehealth session and the event is already in progress and you are NOT connected, dial the appropriate number below. (Note: If you have not registered for this event you must contact the MBT Schedulers to be connected.)

self-serve connection information → On MBT network 1100101808 and enter PIN 65375 when prompted
Outside of MBT network 1100101808@mbtelehealth.ca

	Site	Room	Codec
Host:	TEAMS Video Conference	Connection5	CVI5
Attendees	WPG-Health Sciences Centre	GH-404 Internal Medicine	VCU10 (55152)
	WPG-SBH	E5047	VCU4 (55263)

Comments:

5.2 Activity View

The **ACTIVITY REPORT** is a read only calendar view of clinical and non-clinical activities at a selected site(s). The activity view report is printable and is the only calendar view in iScheduler where a user can view both clinical and non-clinical events together. See below for a sample activity view report:

Weekly Activity Schedule Overview

DATE 7/21/202   SITE -- All Sites --   ROOM -- All Rooms --

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Jul 18	Jul 19	Jul 20	Jul 21 07:45 – 09:00 (MT) Obstetrics & Gynecology Grand Rounds id: 89333 SITE: Brandon-BRHC Room: MTG LG2–CS4–166 (SRMC) 07:45 – 09:00 (MT) Obstetrics & Gynecology Grand Rounds id: 89333 site: WPG–UofM Room: Theatre B	Jul 22	Jul 23	Jul 24
Sun	Mon	Tue	Wed	Thu	Fri	Sat

*AP – Appointment, MT – Meeting   Black = Scheduled Grey = Cancelled

6.0 INFORMATION

Clicking information in the navigation menu expands the menu and provides access to patient information for those users with the required site permissions as well as the ability to modify or change password and user information.

6.1 Password

Clicking **PASSWORD** in the information menu allows you to change your current iScheduler password.

6.2 User Info

Clicking **USER INFO** in the information menu opens your user contact information. (Contact the Digital Solutions Facilitator for your region if you require any changes to this information.)

7.0 EQUIPMENT

Clicking **equipment** in the navigation menu gives access to activity reports which allow Site Contacts to view when and where their telehealth equipment is being used.

Clicking **REPORT** in the equipment menu opens a search window that allows you to create an equipment usage listing by site, date, equipment type, and/or name.

SEARCH FILTER		
SITE: Any Site	FROM 7/21/202 07:0	TO 7/28/202 17
TYPE: -- All Types --	NAME	

Found: 8 Displaying 1–8

EQUIPMENT		ROOM
Baldur–Baldur Health Centre		
VCU1 (56001)	7/28/2021 07:45 – 09:00	HYBRID1–Board Room
Brandon–BRHC		
VCU3 (56017)	7/21/2021 07:45 – 09:00	MTG LG2–CS4–166 (SRMC)
VCU3 (56017)	7/28/2021 07:45 – 09:00	MTG LG2–CS4–166 (SRMC)
Neepawa–Neepawa Health Centre		
VCU1 (56105)	7/26/2021 14:20 – 15:20	CLIN1–Assessment Room
WPG–Health Sciences Centre		
VCU4 (55148)	7/26/2021 10:00 – 11:00	JBRC–777
VCU34 (55173)	7/26/2021 14:20 – 15:20	CH–138
WPG–UofM		
VCU2 (55326)	7/21/2021 07:45 – 09:00	Theatre B
VCU2 (55326)	7/28/2021 07:45 – 09:00	Theatre B

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