



iScheduler Self Scheduling Clinical Events User Guide

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iScheduler Self Scheduling Clinical Events User Guide



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.

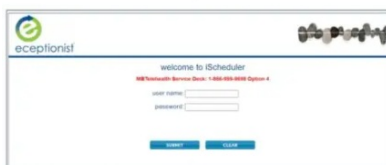
SYSTEM ACCESS

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.

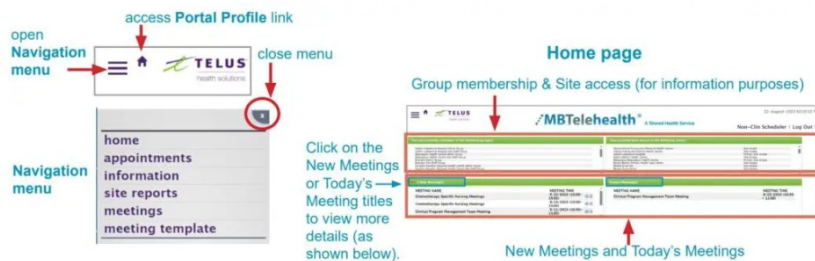
Set up a secure password using a minimum of 8 characters and 3 of these 4 criteria: uppercase character, lowercase character, number, special character (! * ? etc). If you need your password changed, contact the Service Desk at 204-940-8500 Option 4, Option 1 or toll-free 1-866-999-9698 Option 4, Option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

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



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). Clicking on the New Meetings link shown above opens a window that



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 / CODE) | MEETING TIME | DAY OF WEEK | ACTION |
|------|--------------|-------------|---------------------------------|---|-------------|--------|
| 1004 | Cardiology | | WPC-15H Y-3003 - VCUS (5262) | Monday, October 20, 2008 (08:00 - 09:30) | Monday | |

lists the new meetings scheduled at your site(s).

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 user 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.)

List of Meeting Templates

| DESCRIPTION | HOST SITE | TECHNOLOGY ROOM | MEETING TIME | ACTION |
|--|----------------------------|------------------------|---------------|--------|
| 958 OnP Education and Training Committee Meeting | WPC-Health Sciences Centre | PE-182F | 11:30 - 12:00 | |
| 957 Critical Care Morning Education Sessions | WPC-Health Sciences Centre | RS-205 Resp. Boardroom | 08:00 - 09:00 | |

3. Review the information on the GENERAL INFO tab.

| | | | |
|---------------|--|--|------------------------|
| MEETING TOPIC | Education | MEETING TYPE | Virtual |
| SUBJECT | Critical Care Morning | DESCRIPTION | |
| PRIORITY | <input checked="" type="radio"/> Standard <input type="radio"/> Urgent | | |
| HOST SITE | WPG-Health Sciences Centre | HOST ROOM | RS-205 Resp. Boardroom |
| EQUIPMENT | EQUIPMENT | ROOM CODEC | VCU38 (55388) |
| SUPPORT TYPE | Service Desk | <input checked="" type="checkbox"/> Open Registration? | |

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.
 iScheduler User Guide – Self-Scheduling for Non-Clinical Events

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

| | | | |
|------------------|-----------------|---------|----------|
| STARTDATE | 09/02/21 | ENDDATE | 10/07/21 |
| STARTHOUR | 12:00 | ENDHOUR | 13:00 |
| MEETING DURATION | 60 (in minutes) | | |
| DATE TYPE | Weekly | | |

2. 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.

| | |
|----------------|----------------------|
| ATTENDEE SITE | -- Select a Site -- |
| ATTENDEE ROOM | |
| ATTENDEE CODEC | -- Select a Codec -- |

ADD CANCEL

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

4. If all sites are available you will receive the message “Meetings have been successfully created!”
5. 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.

| Event | EventID | Site | Room | Start Time | End Time | Detail | Action |
|---------|---------|----------------------------|--------|-------------------|------------------|--------|--------|
| Meeting | 95361 | WPG-Health Sciences Centre | MS-473 | 9/2/2021 12:00 PM | 9/2/2021 1:00 PM | | view |

Selected equipment: WPG-Health MS-473 9/2/2021 12:00-9/2/2021 1:00 VCI125/551653 is not

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.

4.2.2 To edit the event title

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

4.2.3 To add an attendee site(s):

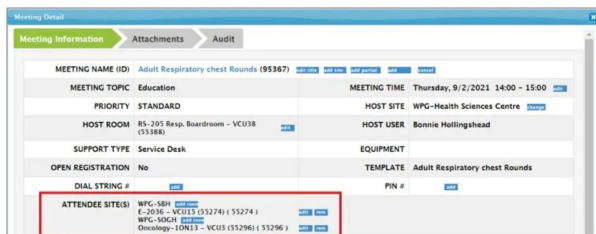
1. Click on meetings to expand the menu and use either CALENDAR or MEETING SEARCH and click on the meeting to select it.
2. On the Meeting Information tab, click add site on the MEETING NAME line.



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.

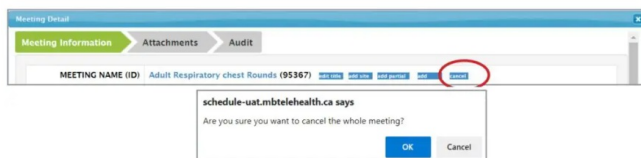
3. When the Change Host Site window opens, select the new site/room/codec from the drop-downs from the ATTENDEE SITES or any of the ADDITIONAL SITES available.
4. Scroll to the bottom of the page and click CHANGE HOST. Ensure you check off Make host an attendee site? box if you want them to still be 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:

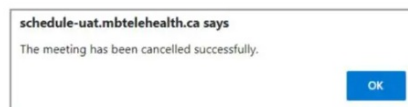
1. Click on meetings to expand the menu then find the meeting you want to modify using CALENDAR or MEETING SEARCH and click the meeting to open it.

2. Click cancel on the MEETING NAME line.

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



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.

Appointment Whiteboard Report

Total Number of Events Between Thursday, 8 September 2022 and Thursday, 8 September 2022: 2

| Event | START: 8/9/2022 12:00:00 PM | END: 8/9/2022 1:00:00 PM | Meeting |
|------------------------|-------------------------------------|--------------------------|---------------|
| Multi-Site Event: M502 | | | |
| Site | TRG-Health Science Centre (Ponding) | 100-473 | VC222 (11845) |
| Attendees | TRG-ASB | A-8108 | VC222 (11847) |
| | TRG-ASB | B04102 | VC222 (11846) |
| Multi-Site Event: M508 | | | |
| Site | TRG-Health Science Centre (Ponding) | 100-473 | VC222 (11845) |
| Attendees | TRG-ASB | B-2018 | VC222 (11846) |


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

Read More About This Manual & Download PDF:

Documents / Resources

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|  | <p>iScheduler Self Scheduling Clinical Events [pdf] User Guide Self Scheduling Clinical Events, Scheduling Clinical Events, Clinical Events, Events</p> |
|--|--|

References

- [🌐 schedule.mbtelehealth.ca/default_login.aspx](https://schedule.mbtelehealth.ca/default_login.aspx)
- [User Manual](#)