How to Manage Appointment Blocks Using Scheduler

AVBS User Guide – Health Care Provider and Provincial Operations

As of March 15th, 2022

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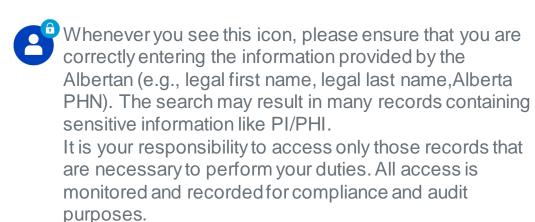


Privacy Policy

The appropriate collection, use and disclosure of an Albertan's personal health information is the requirement of Alberta's Health Information Act and FOIP Act.



Whenever you see this icon, please ensure that you collect verbal consent from the Albertan for disclosure of their personal health information.



Whenever you see this icon, please pay attention to the action that is being performed. It is important you follow these instructions.



Please note that following practices are prohibited and against the code of conduct related to the handling of sensitive information (PI/PHI) unless your role authorizes you to do so:

- Saving lists locally on computer
- Saving lists on other storage media
- Printing lists
- Taking pictures
- Taking screenshots



Managing Appointment Blocks Using the Scheduler: Overview

Objectives: To manage vaccination appointment blocks at a vaccination site using the Scheduler, including setting up

appointment blocks (custom and non-custom), adding appointment blocks, cancellation of appointments,

and cloning.

AVBS Role: Health Care Provider and Provincial Operations

Pre-Requisite: Facility record needs to be available in AVBS and you should have reviewed the "Overview of Scheduler"

User guide to understand all the features.

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Updating Available Vaccines Field

It is very important that you enter the vaccines available at your facility in the Available Vaccines field on the Details tab of the facility record, or else they will not appear as available for appointment booking. The

Available Vaccines field on the facility record must be monitored and updated regularly to reflect the vaccine availability.

To enter the Available Vaccines at your facility, follow the steps below:

4a Click on the Edit (pencil icon).

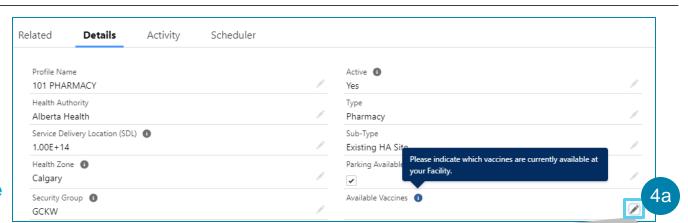
An editable window will display.

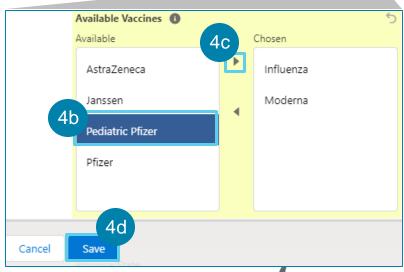
- 4b Select the vaccines available at your facility.
- Move the available vaccine types from the Available column to the **Chosen** column using the arrow.

Repeat this steps until you've chosen all vaccine types available at your facility.

4d Click Save.

You can also use the to remove vaccine types from the **Chosen** column. Vaccine types that are left under the **Available** column will not appear as available for appointment booking.







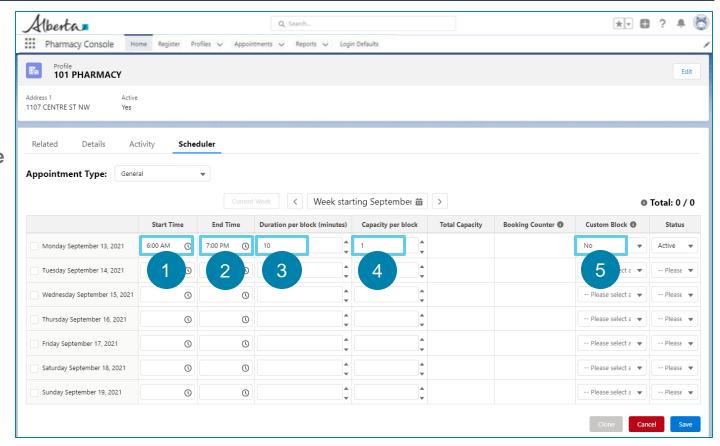
Setting Up a Non-Custom Block

A Non-Custom Block is defined as a day that contains Appointment Blocks of equal duration and capacity. To set up a non-custom block, follow the steps below:

For the desired day in which you need to set the appointment blocks, e.g., Monday, define the **Start Time** of the appointment blocks by selecting from the dropdown list.

Note that the **Cancel** and **Save** buttons display at the bottom as soon as you select the start time.

- 2 Define the **End Time** of the appointment blocks.
- 3 Enter the **Duration (minutes)** per block.
- 4 Enter the appointment Capacity (number of appointments) per block.
- 5 Select **No** in Custom Block to set up as a non-custom block.

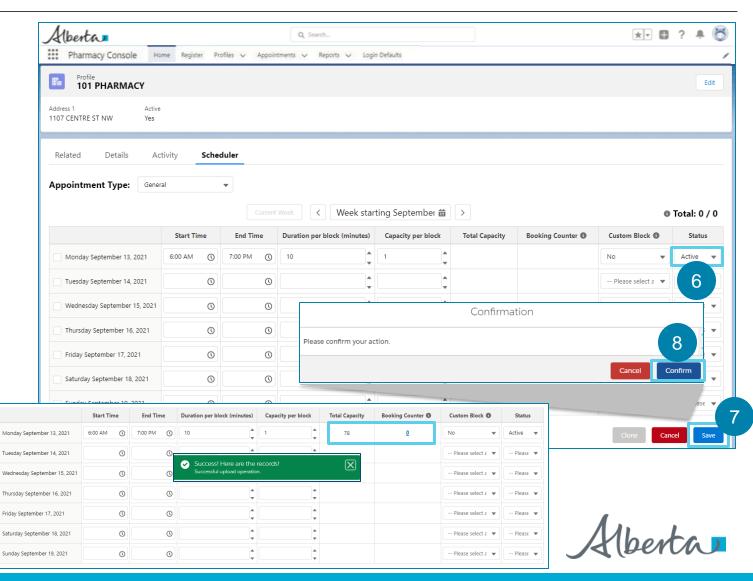




Setting Up a Non-Custom Block (Continued)

- 6 Select the Status.
- 7 Click Save.
- 8 Click **Confirm** in the confirmation window.

A success message will display, and the **Total Capacity** and **Booking Counter** will be auto-populated.



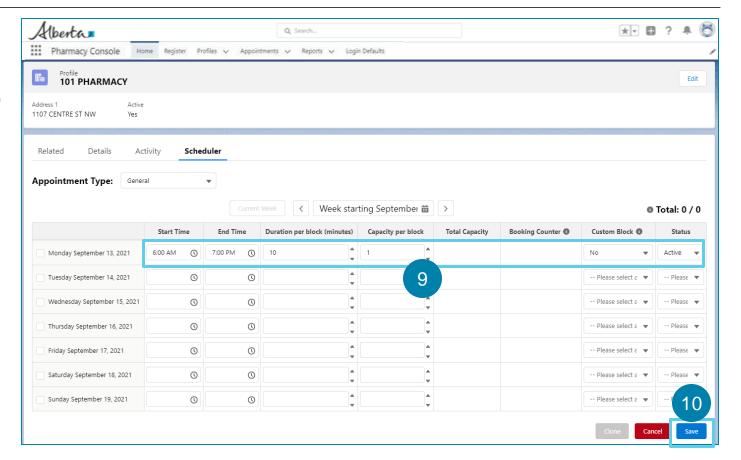
Setting Up a Non-Custom Block (Continued)

If you need to make modifications to a Non-Custom Block, follow the steps below.

Make the necessary edits to the Start Time, End Time, Duration per block (minutes), Capacity per Block, and the Status.

See the Rules for Updating Information on a Schedule section in this user guide for details.

10 Click Save.





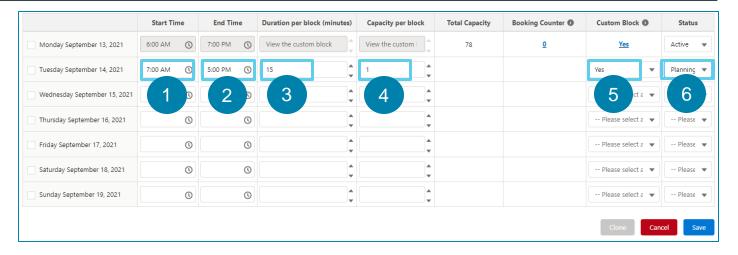
Setting Up a Custom Block

A Custom Block is defined as a day that contains modular appointment blocks with different duration and capacity. It allows you to create appointments adapted to the available resources. To set up a custom block, follow the steps below:

- Define the **Start Time** of the appointment blocks by selecting from the drop-down list.
- 2 Define the **End Time** of the appointment blocks.
- 3 Enter the **Duration (minutes)** perblock.

The duration entered must not exceed the time allotted for the block. Please ensure that the duration per block is less than or equal to the difference between the start and end time.

- 4 Enter the appointment **Capacity** per block.
- 5 Select **Yes** in Custom Block to set up as a custom block.
- 6 Select the **Status**.





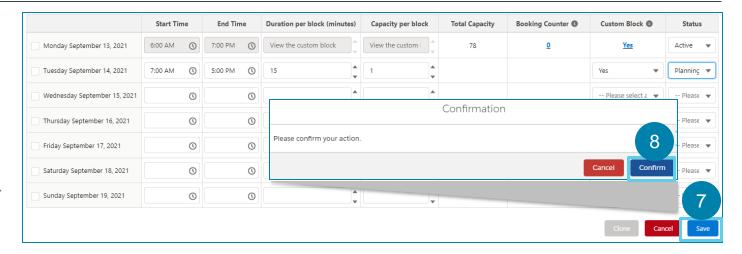
Setting Up a Custom Block (Continued)

- 7 Click Save.
- 8 Click **Confirm** in the Confirmation window.

A success message will display, and the **Total Capacity** and **Booking Counter** will be auto-populated.

- Note: You can also convert a Non-Custom block into a Custom block by replacing "No" with "Yes" in the Custom Block column.
 Once the Custom Block is changed to "Yes", it cannot be changed back to "No".
- 9 Click the **Yes** link to open the custom block.

A Custom Blocks for the day pop-up window will display and you will see all the appointment blocks for that day in different rows.



	Start Time		End Time	Duration Success! Here are the records!		(X) acity	Booking Counter 1	Custom Block 1	Status
Monday September 13, 2021	6:00 AM (3	7:00 PM 🕠	Successful upload of View the castom block	view the castom	70	<u>0</u>	9	Active •
Tuesday September 14, 2021	7:00 AM (3	5:00 PM 🕓	View the custom block	View the custom	40	<u>0</u>	<u>Yes</u>	Planning •
Wednesday September 15, 2021		0	0					Please select a ▼	Please ▼
Thursday September 16, 2021		O	0	<u></u>				Please select a 🔻	Please ▼
Friday September 17, 2021	(0	0					Please select a ▼	Please ▼
Saturday September 18, 2021	(0	0					Please select a ▼	Please ▼
Sunday September 19, 2021	(3	0		•			Please select a ▼	Pleas∈ ▼



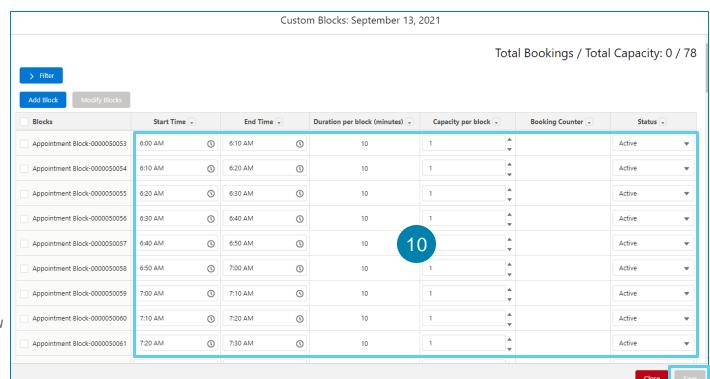
Setting Up a Custom Block (Continued)

Edit each row of appointment block and update as needed.

Make sure you check the **Booking Counter** if there are active appointments in the block before you make the updates.

- Start Time and/or End Time
- **Duration per block (minutes)** You cannot update the duration of a block if it has active appointments.
- Capacity per block
 — To remove/delete the appointment block, you must enter 0 in this field.
- Note: If there are appointments booked for the appointment block you are updating, then the lowest Capacity per block you can put is the same number as the Booking Counter. The value in this field cannot be lower than the value in the Booking Counter. (See Rule for Editing Capacity per block section in this user guide for details.)
- Status Update the status of the appointment block, if needed.







Setting Up a Custom Block (Continued)

- 11 To mass update the Capacity per Block and Status:
 - Select the check box of each Appointment Block to be edited.

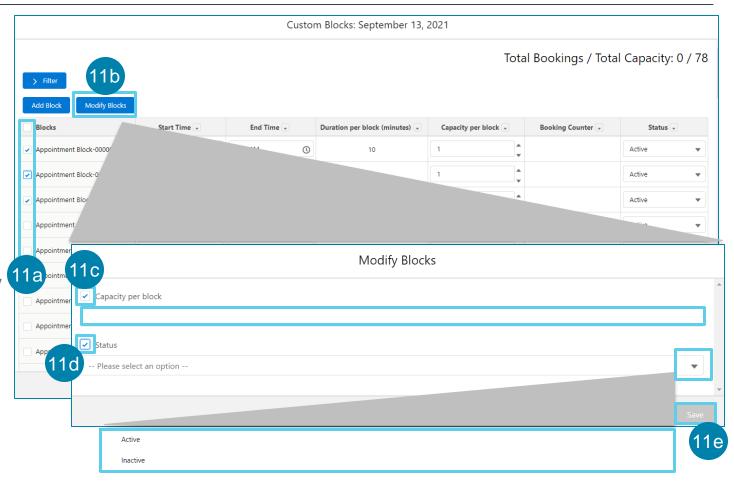
You can also check off the box next to Blocks to select all appointment blocks.

11b Click on Modify Blocks.

A Modify Blocks pop-up window will display.

- Select the check box to mass update the **Capacity**per Block of the selected appointment blocks and enter the capacity per block in field.

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- Select the check box to mass update the **Status** of the selected appointment blocks and select the status from the drop-down menu options.
- 11e Click Save.

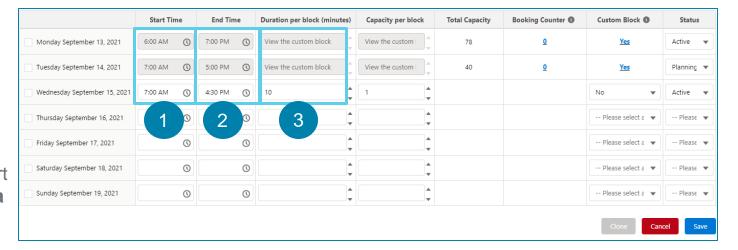




Rules for Updating Information on a Scheduler

There are certain rules for updating the information on the Scheduler regardless of whether the appointment blocks within are custom or non-custom blocks.

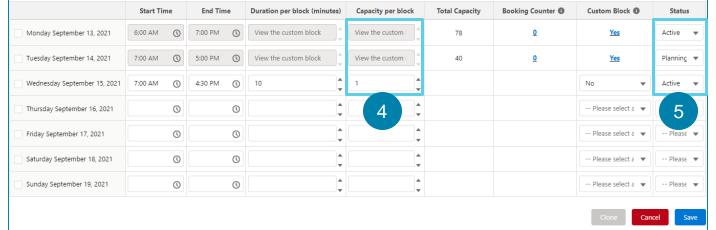
- Start Time: You can update the Start Time to an earlier time of the day if you want to add additional appointment block(s) for the day before the existing start time. However, you cannot update the Start Time to a later time if there are already active appointments for that time, unless you cancel the active appointments.
- End Time: You can update the End Time to a later time of the day if you plan to add more appointment blocks beyond the existing time blocks. However, you cannot update the End Time to an earlier time if there are already active appointments for that time, unless you cancel the active appointments.
- Duration per block (minutes): You cannot update the duration of a block if it has active appointments, unless you cancel the active appointments.





Rules for Updating Information on a Scheduler (Continued)

- Capacity per block: If there are active appointments, then the lowest capacity per block you can include is the same number as the Booking Counter. The value in this field cannot be lower than the value in the Booking Counter.
- **Status:** You can change the status to Inactive even if there are booked appointments. This will not impact the booked appointments, but it will not allow Albertans to book appointments for this time slot.





Rules for Updating Information in the Custom Blocks

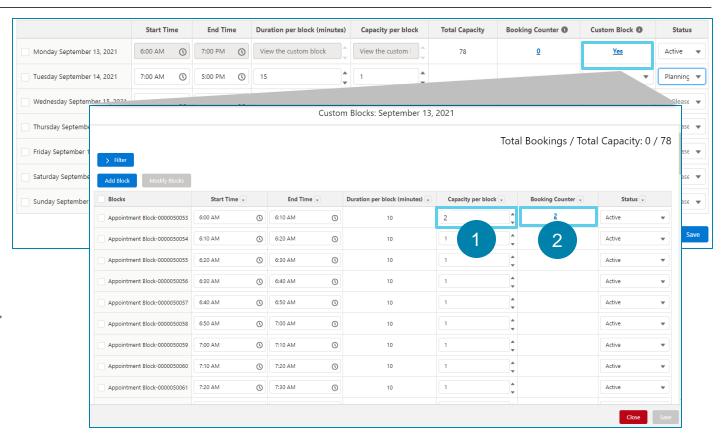
The rules for updating information in the individual appointment blocks within a Custom Block is similar to updating information on a Scheduler at the day level. An example for updating Capacity per block within a custom block is shown below:

- Once you are on the **Custom Blocks** page for the selected day, if there are appointments already booked for the appointment block you are updating, then the lowest **Capacity per block** you can put is the same number as the **Booking Counter**.
- If **Booking Counter** = 2, that means there are 2 confirmed appointments. If you change the **Capacity per block** to any number less than 2, an error message will display.

You must have at least one block available

If you still need to reduce the capacity for an appointment block that has appointments, you must first cancel the active appointments and then reduce the capacity per block.

If you update the **Capacity per block** to 2 or more, you will be able to proceed with the changes.

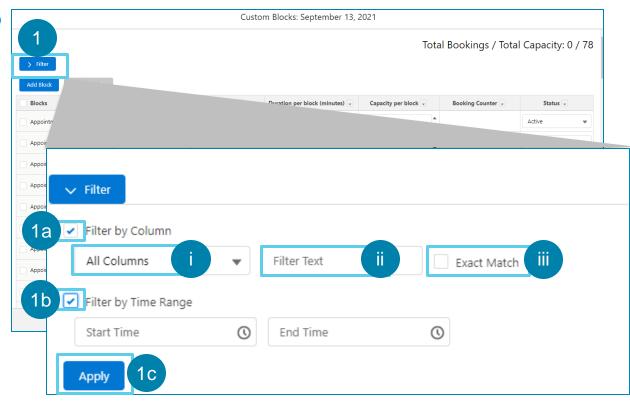




Filter Feature in Custom Blocks

The Custom Blocks page has a filter feature that allows you to filter the appointment blocks by Column and/or Time range. To filter the appointment blocks, follow the steps below:

- 1 Click the **Filter** button on the **Custom Blocks** page. New fields where you can enter the filter criteria will display.
 - Select the **Filter by Column** checkbox if you want to filter the appointment blocks by a particular column or all the columns.
 - Select the **Column**, e.g., Status
 - Enter the **Filter Text**, e.g., active
 - Select the **Exact Match** checkbox to filter by the exact value you entered in the Filter Text field. If this is not selected, the system will pick all the items that has the filter text.
 - Select the **Filter by Time Range** checkbox if you want to filter the appointment blocks by a particular **Start Time** and **End Time**.



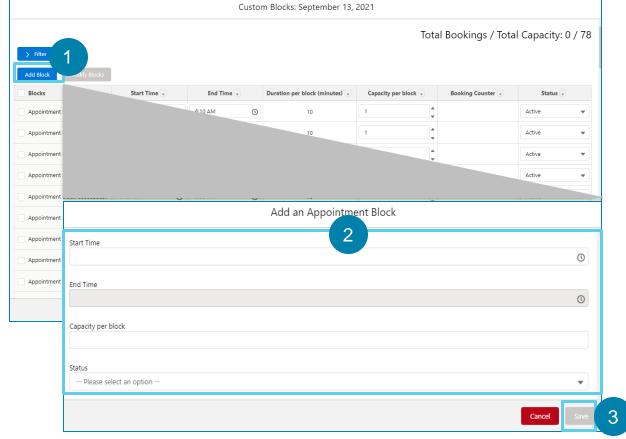




Adding Appointment Blocks in Custom Blocks

Once you are on the Custom Block for a day, you will be able to add new appointment blocks by following the steps below:

- 1 Click on the **Add Block** button.
- 2 Enter the information in the following fields:
 - **Start Time** of the new appointment block (*You can select from the list of options from the drop-down or enter the time manually.*)
 - **End Time** of the new appointment block (*You can select from the list of options from the drop-down or enter the time manually.*)
 - Capacity per Block
 - Status for the new block
- 3 Click Save.





Deleting Appointment Blocks in Custom Blocks

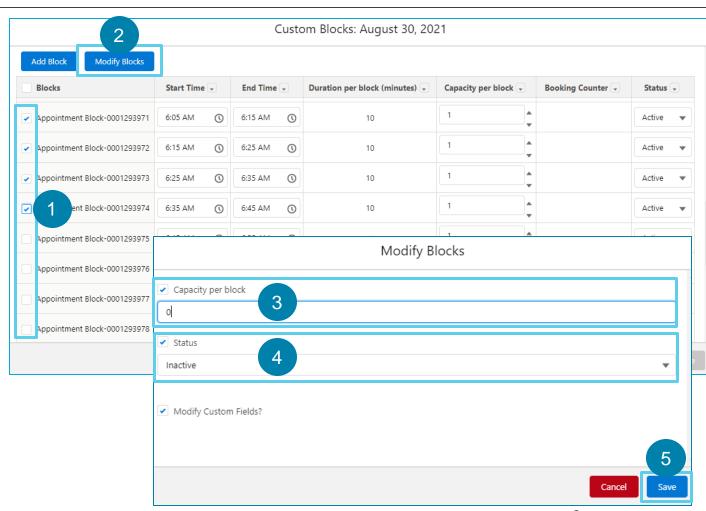
Once you are on the Custom Block for a day, you will be able to delete appointment blocks by following the steps below:

- Select the check box of **each Appointment Block** to be deleted.
- 2 Click on Modify Blocks.

A Modify Blocks pop-up window will display.

- 3 Select the check box to mass update the **Capacity per Block** of the selected appointment blocks and enter the capacity per block to **0**.
- Select the check box to mass update the **Status** of the selected appointment blocks and set the status to **Inactive**.
- 5 Click Save.

The appointment blocks will no longer appear in the custom blocks page and the **Total Capacity** will be reflective of the new total capacity.





Deleting Appointment Blocks in Custom Blocks (Continued)

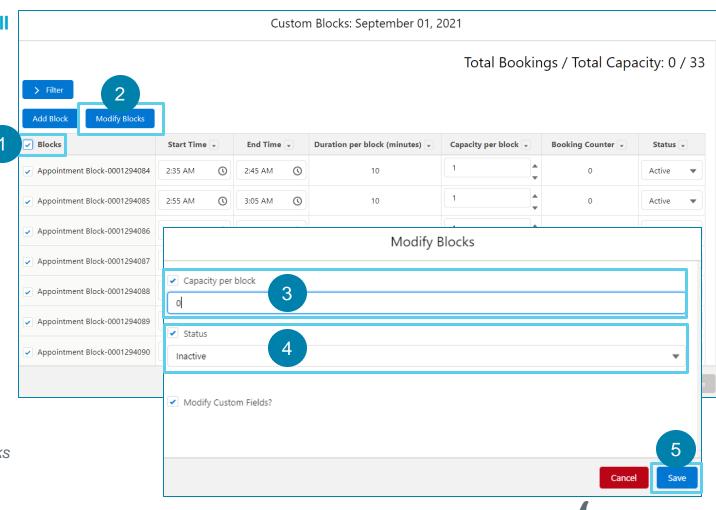
Once you are on the Custom Block for a day, you will be able to delete an entire appointment day by deleting all appointment blocks for that day. Follow the steps below for detailed instructions.

- 1 Select all Appointment Blocks for that day.
- 2 Click on Modify Blocks.

A Modify Blocks pop-up window will display.

- 3 Select the check box to mass update the **Capacity per Block** of the selected appointment blocks and enter the capacity per block to **0**.
- Select the check box to mass update the **Status** of the selected appointment blocks and set the status to **Inactive**
- 5 Click Save.

The appointment blocks will no longer appear in the custom blocks page and the appointment day will be deleted. You will be able to modify all information of the appointment day, except if the appointment day was originally a custom block. Once a block is changed to a custom block, it cannot be changed back to a non-custom block.





Cancelling Booked Appointments

To cancel the booked appointments for custom or non-custom blocks, follow the steps below:

1 For the desired day for which you need to cancel the appointments, click on the link under **Booking Counter.**

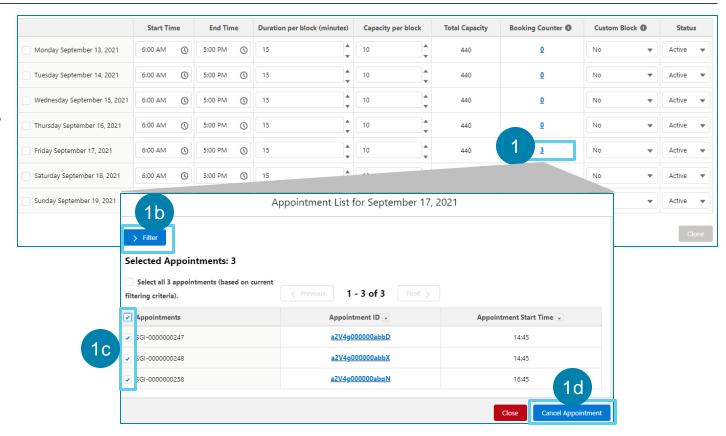
The Appointment List for the day will display.

- Use the **Previous** and **Next** buttons to navigate to the specific appointment that you need to cancel if it is not on the landing page.
- Click the **Filter** button to filter the appointments by specific **Column** or **Time Range**.

To know how to use the filter feature, refer to page 23 of this User Guide.

- 1c Check off the individual appointments or check off the checkbox next to **Appointments** to select all appointments.
- 1d Click Cancel Appointment.

Note that this button will be inactive until you select an appointment to cancel.





Cancelling Booked Appointments (Continued)

On the confirmation pop-up window that displays, review the cancellation information and then click the **Confirm** button.

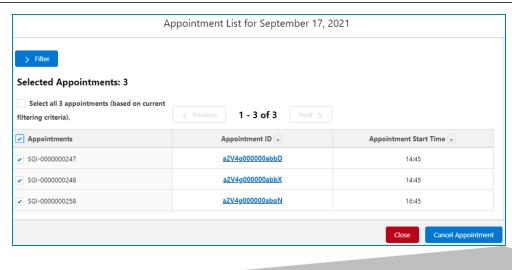
A success message will display, which will also have the number of appointments that were cancelled.

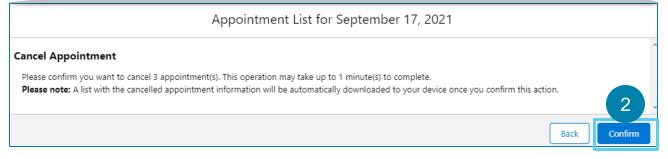
3 Click Close.

You will be navigated back to the Scheduler.

Note that the **Booking Counter** will decrease by the number of appointments cancelled.

At this point, all the Albertans associated with the cancelled appointments will receive a notification (through their preferred communication channel in AVBS record) that their appointments have been cancelled.









How to Clone Appointment Days

Once an Appointment Day is created, you can clone one Appointment Day at a time, for multiple future Appointment Days. To clone an Appointment Day, follow the steps below:

1 Select the **Appointment Day** you would like to clone.

The Clone button will become enabled.

2 Click Clone.

A Cloner window will display.

- 3 Select the **Start Date** and the **End Date** of your target period.
- Using the **checkboxes**, specify which days of the week of the target period that you would like cloned.
- 5 Click Clone.

A success banner will appear, and you will be brought back to the appointment scheduler. All information of the Appointment Day will be cloned except for the Status. The Status field will automatically be set to Active for all appointment blocks.

