# How to Create List Views for updating appointment lists

## AVBS User Guide – Health Care Provider and Provincial Operations

As of March 15th , 2022

**Pharmacy Staff: For any guidance and/or technical support, please contact:**


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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 ensure that you are correctly entering the information provided by the Albertan (e.g. legal first name, legal last name, Alberta PHN). The search may result in many records containing sensitive information like PI/PHI.
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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

# List Views for Appointment Lists: Overview

| | |
|---|---|
| **Objectives:** | To create list views that allow you to update appointment lists |
| **AVBS Role:** | Health Care Providers and Provincial Operations |
| **Pre-Requisite:** | You must have access to the AHS Console. |

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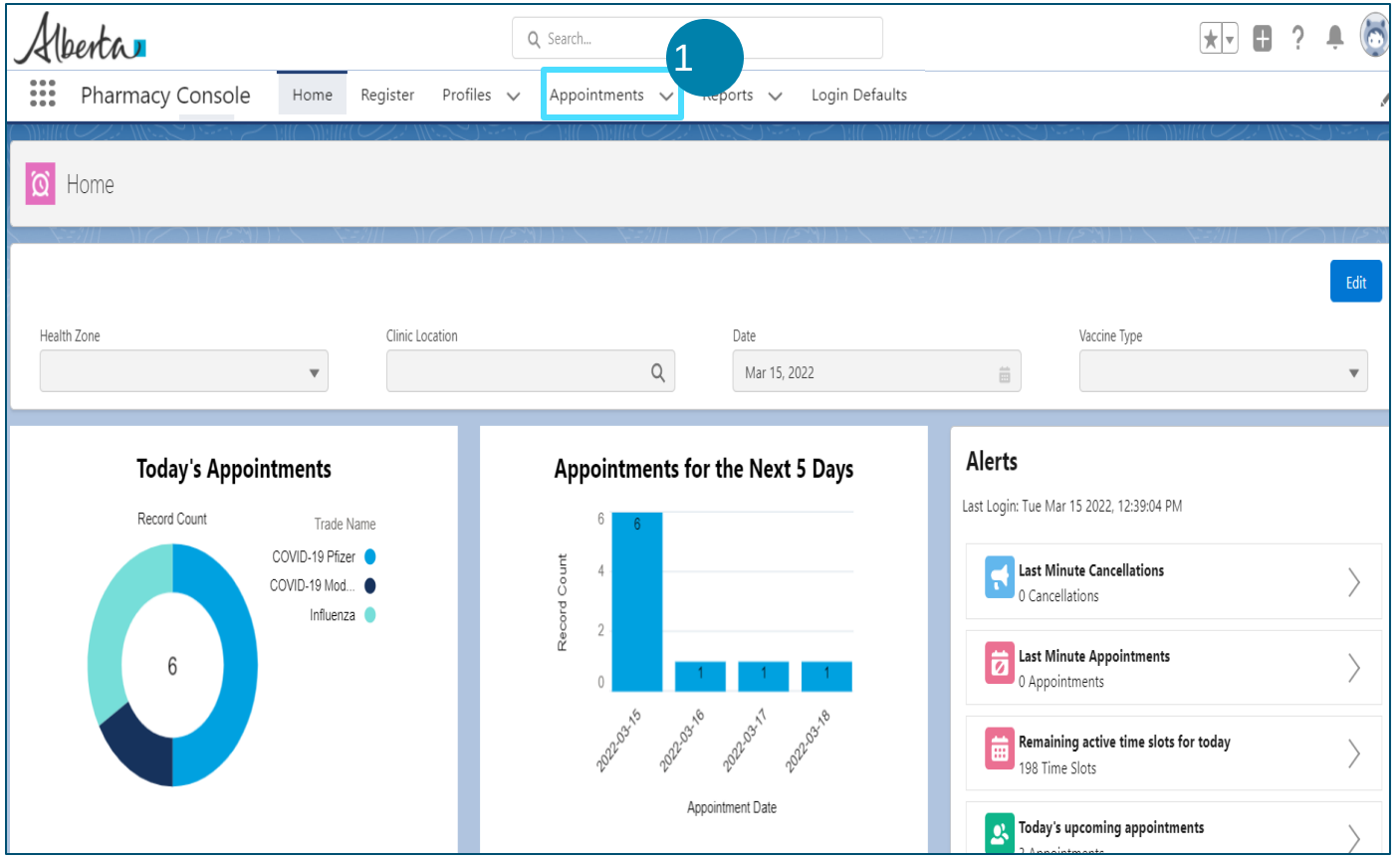
 **Note:** The term vaccination site used throughout this user guide refers to pharmacies, AHS clinics and physician offices.

# Creating Private List View for Appointments to be Cancelled

**Private list views can be created in AVBS manually, or by cloning a global list view. To create a private list view for Appointments to be Cancelled for your vaccination site, follow the steps below:**

1. Click on **Appointments** to open the lists of appointments for vaccination.

*You will be directed to the Recently Viewed list view*



# Creating Private List View for Appointments to be Cancelled (Continued)

2 Create a new list view by following the steps below:

2a Select **New** under **List View Controls**.

*A popup box will display.*

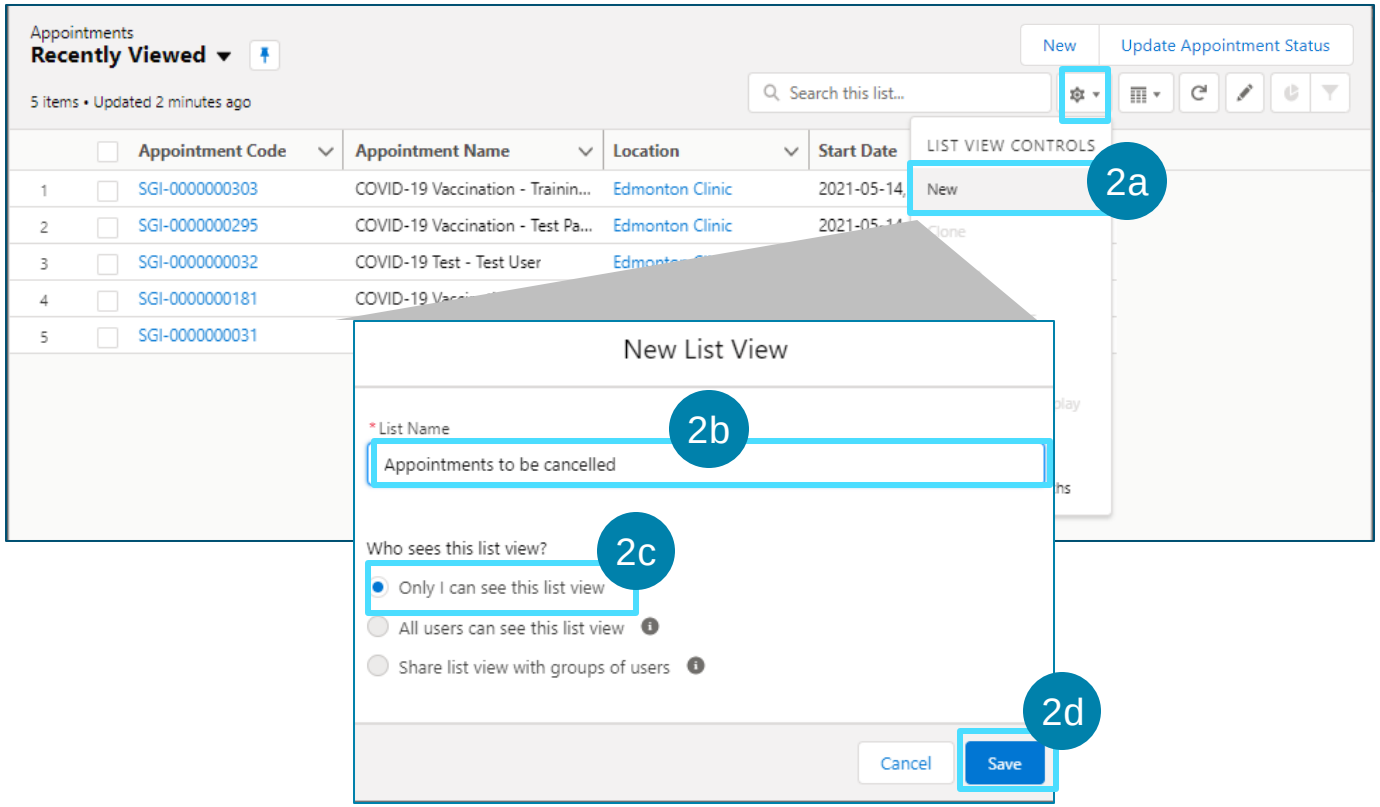
2b Enter your preferred **List Name** (e.g., Appointments to be cancelled).

2c Select **Only I can see this list view**.

*This selection will ensure that the list view is private.*

2d Click **Save**.

*The new list view page will display.*



# Creating Private List View for Appointments to be Cancelled (Continued)

3 Select **Fields to Display** from the List View Controls drop-down menu.

4 Highlight your selection from the **Available Fields** list.

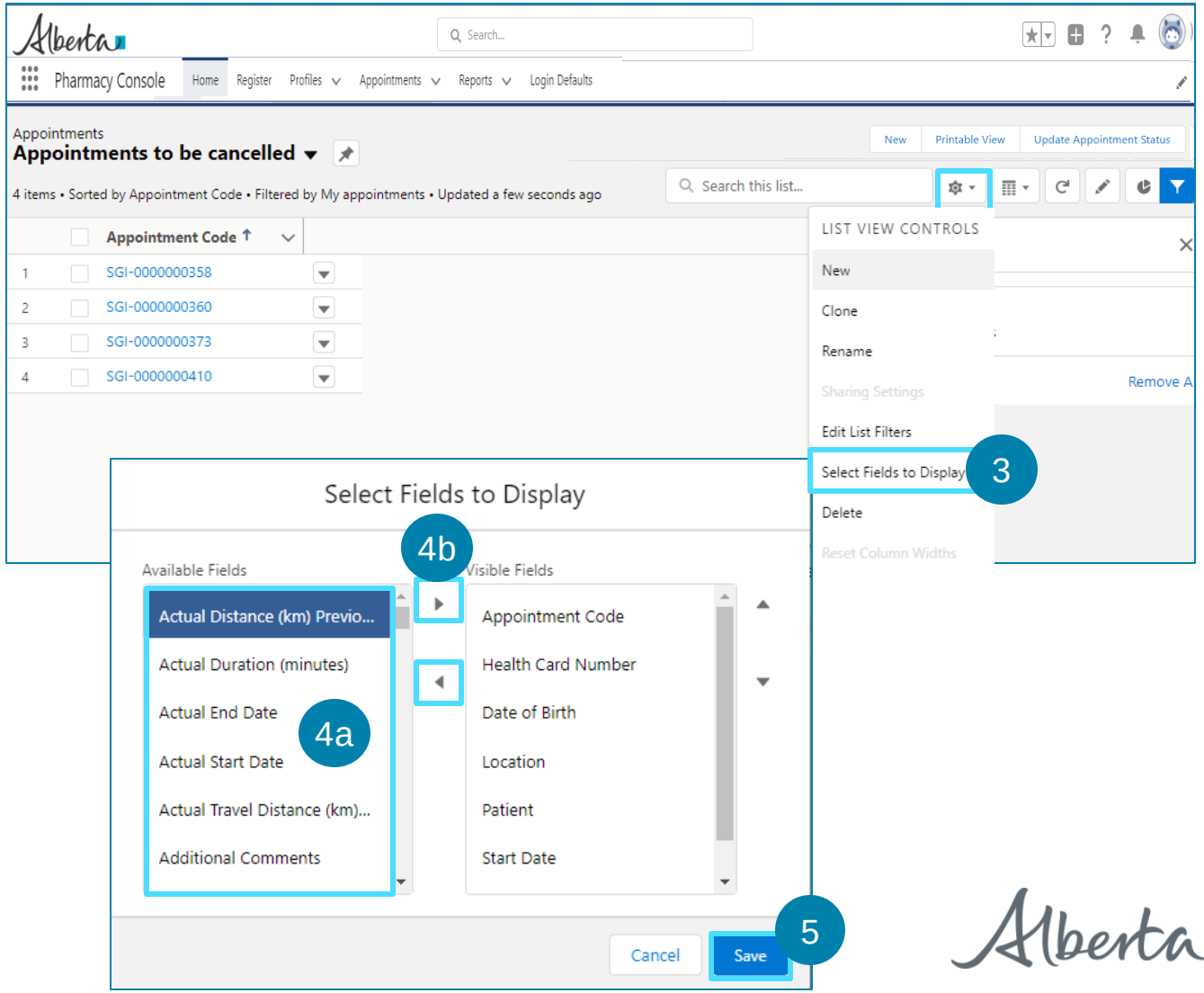
4a Make the following fields **Visible Fields**:

- Appointment Code
- Start Date
- Patient
- Health Card Number
- Date of Birth
- Status
- Location

4b Use the arrow pointing to the right to make the fields Visible Fields.

*You can also move fields from Visible Fields to Available fields by using the arrow pointing to the left.*

5 Click **Save**.



# Creating Private List View for Appointments to be Cancelled (Continued)

**Once you have created a private list view with the correct fields to display, to add the correct filters to view your appointments to be cancelled, follow the steps below:**

6 To add filters, click the Filter icon and click **Add Filter**.

*A New Field box will display.*

7 Create the filters below by entering the following **Field**, **Operator** and **Value**.

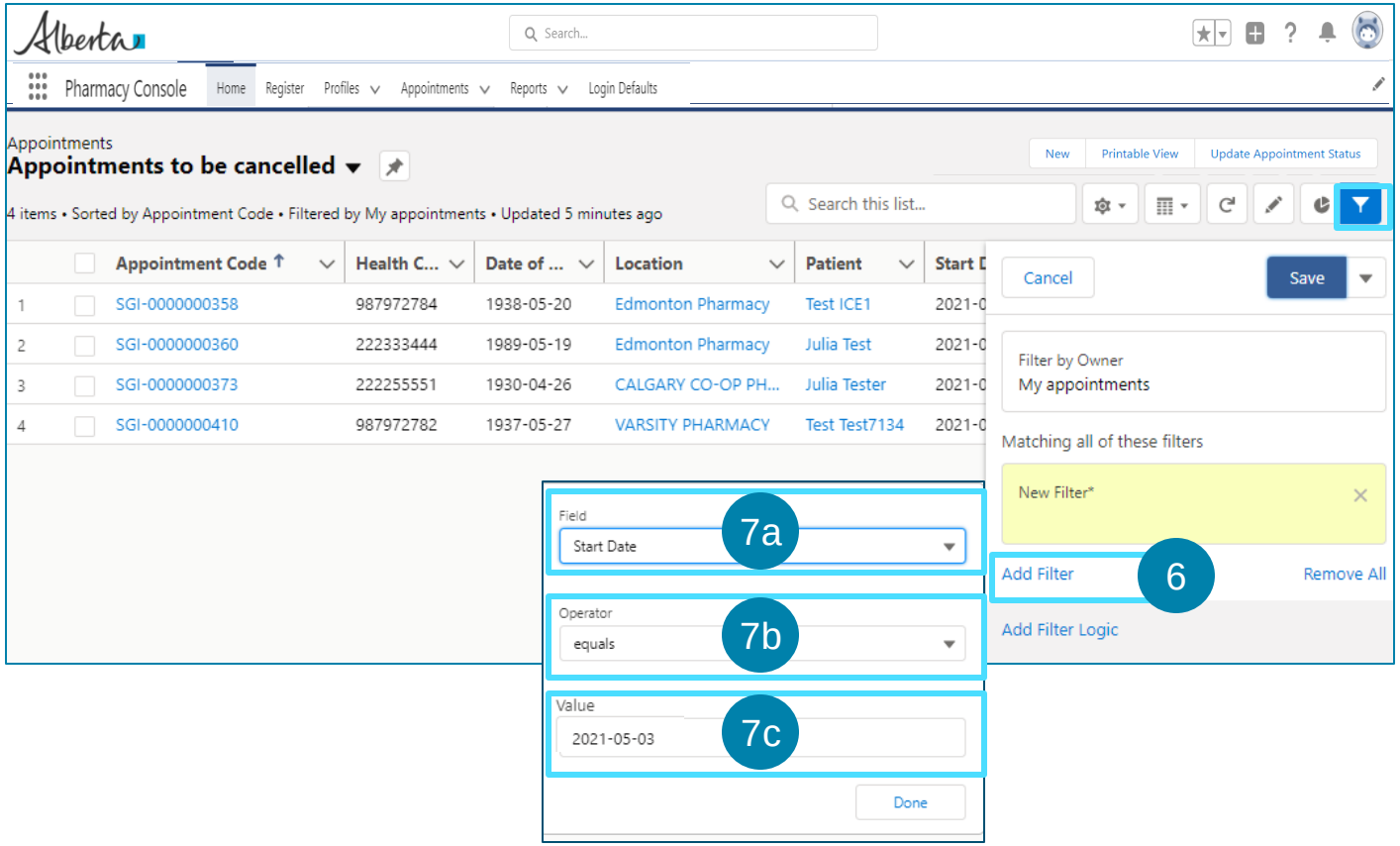
7a Select **Start Date** from the Field drop-down menu.

*This should be the start date of the period affected by the supply disruption.*

7b Select **equals** from the Operator drop-down menu.

*You may also select **greater than or equal to** the date of affected appointments to see all future appointments from the affected date.*

7c Enter the **date** of the affected appointments in the Value field in **YYYY-MM-DD** format.



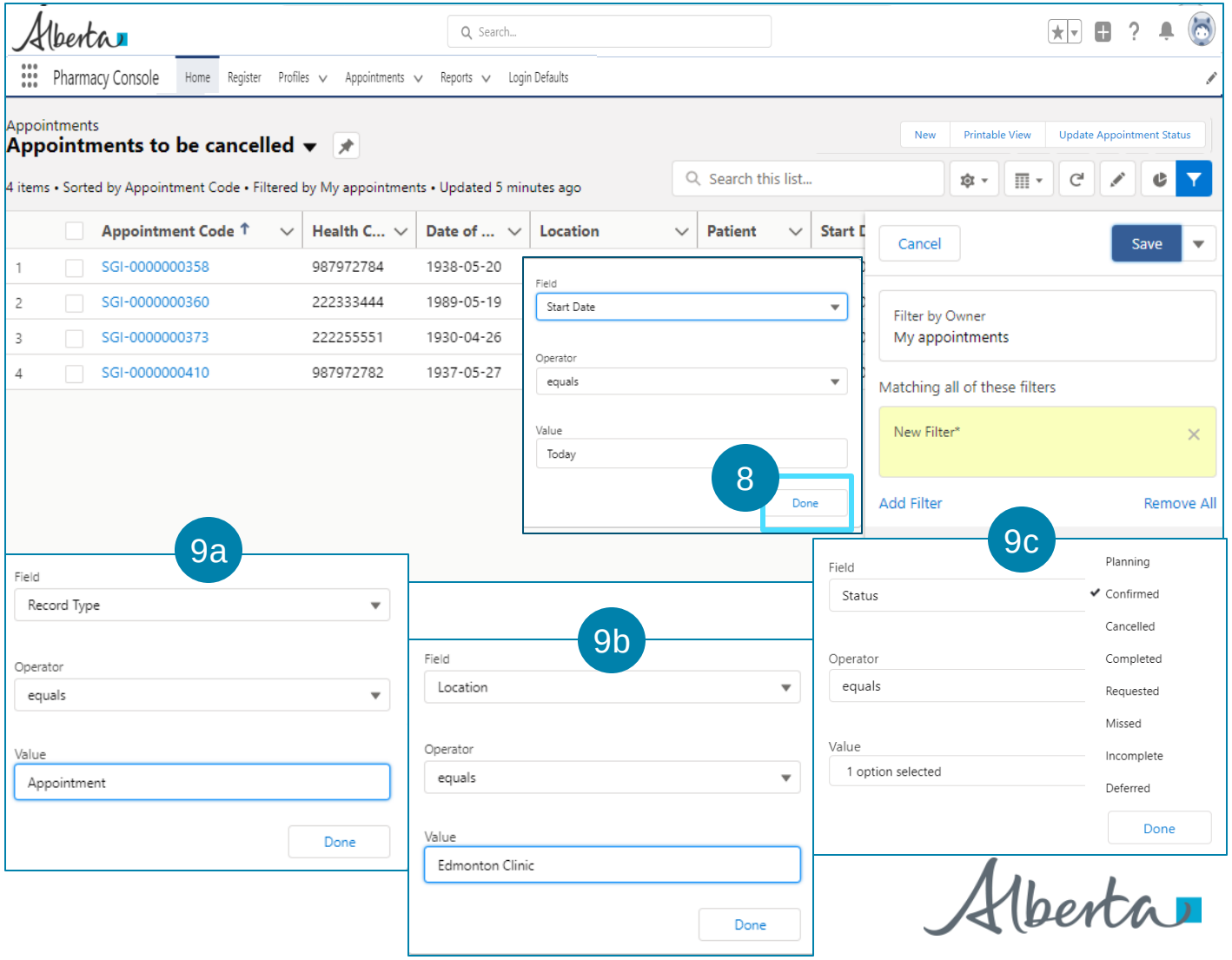
# Creating Private List View for Appointments to be Cancelled (Continued)

8. Click **Done**.

9. Perform steps 8 and 9 again for the following filters:

   - 9a Field = **Record Type**, Operator = **equals**, Value = **Appointment**
   - 9b Field = **Location**, Operator = **equals**, Value = **Name of your Vaccination Site**
   - 9c Field = **Status**, Operator = **equals**, Value = **Confirmed**

*Please note that these filters are only suggested filters to identify the list of appointments to be cancelled at your vaccination site. You can create filters based on your needs by selecting different fields from the drop-down menu.*



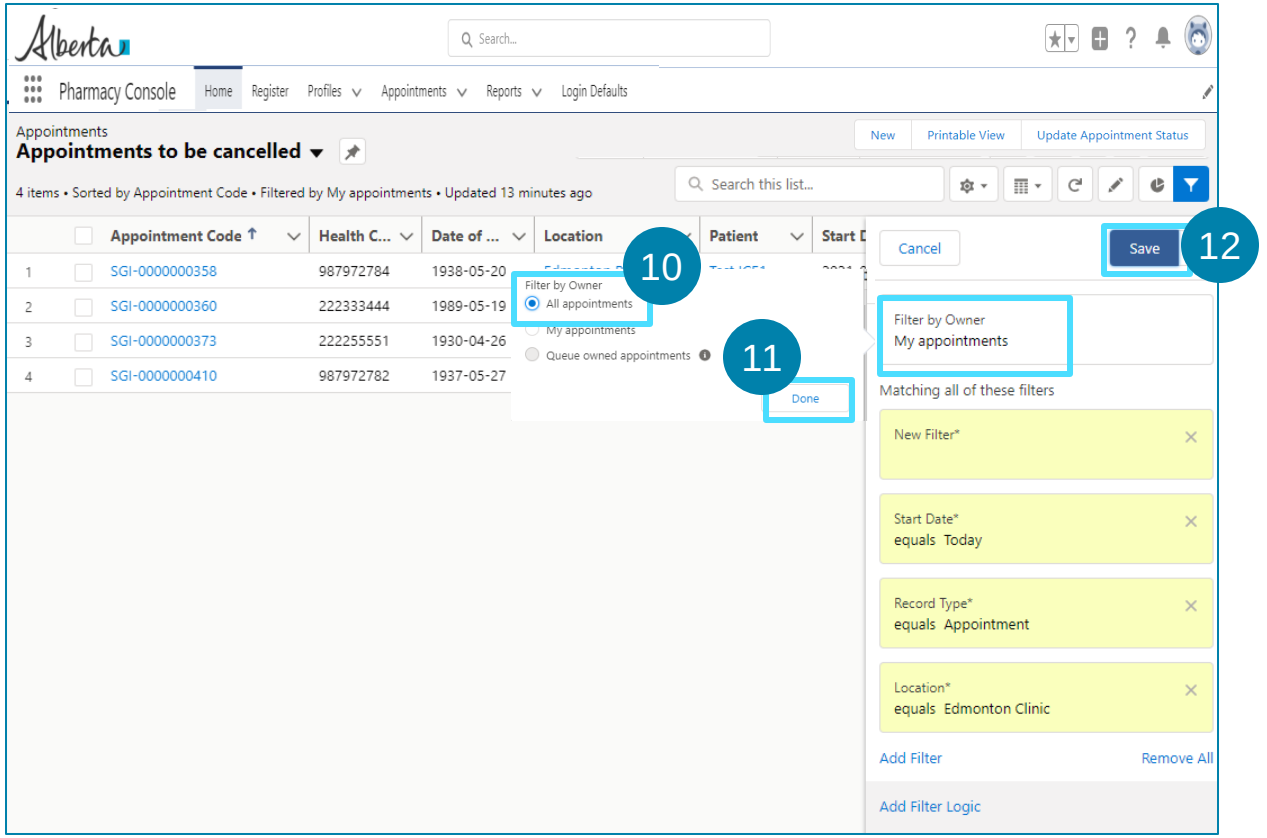
# Creating Private List View for Appointments to be Cancelled (Continued)

10 Once you have added all your preferred filters, click on **Filter by Owner** and select **All Appointments**.

*These filters will allow you to see all the appointments for your vaccination site for that specific day.*

11 Click **Done**.

12 Click **Save**.

*A success banner will display indicating that the list view has been updated.*

*From this list view, you will be able to manually enter each appointment record affected by the supply disruption and click on the Supply Disruption button. For detailed information on these steps, please refer to the How to Manage Supply Disruption User Guide.*