

# How to Create List Views for updating appointment lists

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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

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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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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.

## Table of Contents

## Page Number

Creating Private List Views

- For Appointments to be Cancelled

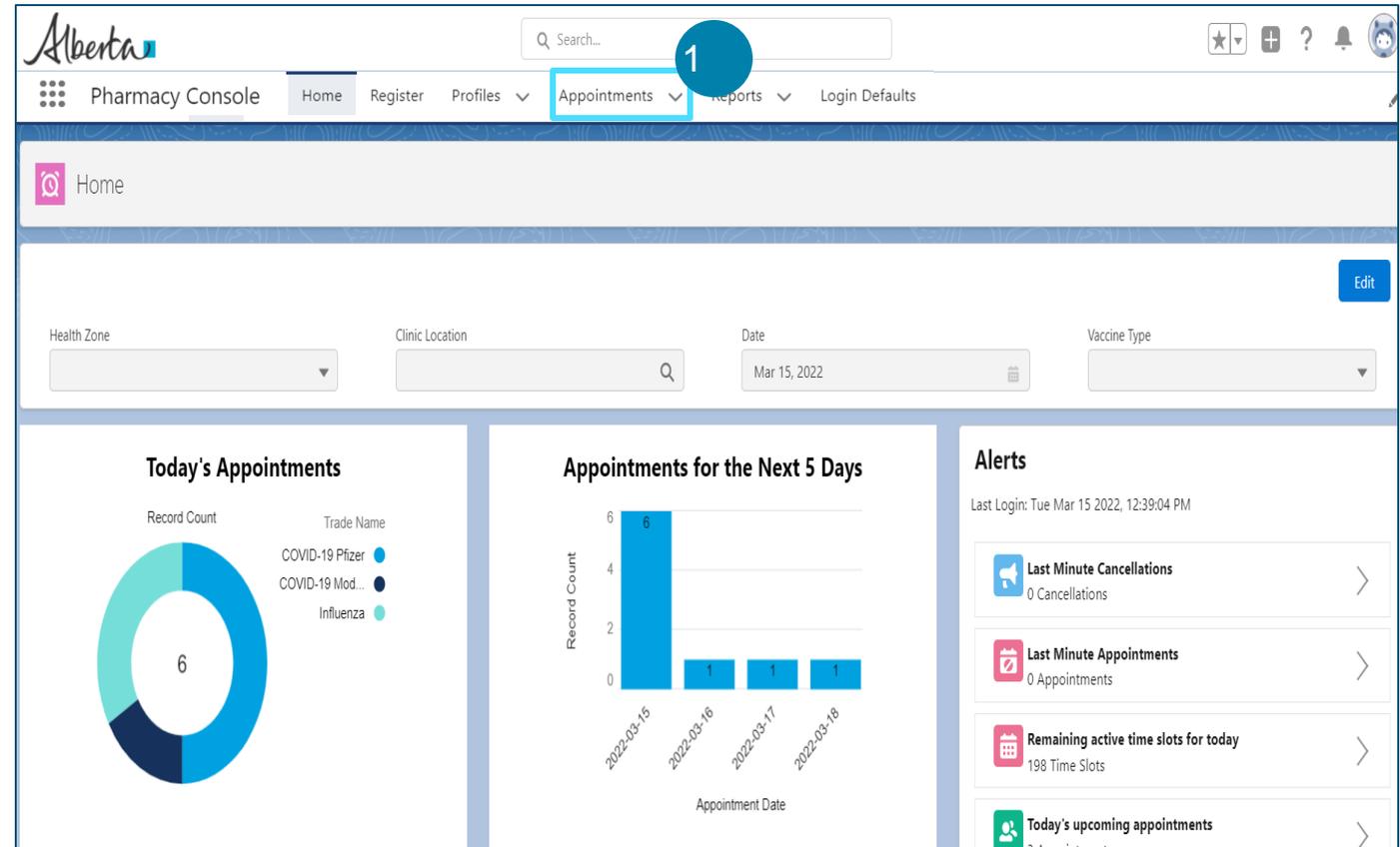
4 – 9

# 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*



The screenshot displays the Alberta AVBS interface. At the top, the 'Appointments' menu item is highlighted with a red box and a red circle containing the number 1. Below the navigation bar, there are filters for Health Zone, Clinic Location, Date (Mar 15, 2022), and Vaccine Type. The main content area is divided into three sections:

- Today's Appointments:** A donut chart showing a total record count of 6. The legend indicates: COVID-19 Pfizer (blue), COVID-19 Mod... (dark blue), and Influenza (light blue).
- Appointments for the Next 5 Days:** A bar chart showing the record count for each day: 6 on 2022-03-15, 1 on 2022-03-16, 1 on 2022-03-17, and 1 on 2022-03-18.
- Alerts:** A list of alerts including: Last Minute Cancellations (0 Cancellations), Last Minute Appointments (0 Appointments), Remaining active time slots for today (198 Time Slots), and Today's upcoming appointments (2 Appointments).

# 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.*

The screenshot displays the 'Appointments' interface. At the top, there are buttons for 'New' and 'Update Appointment Status'. Below these is a search bar and a 'LIST VIEW CONTROLS' menu. The 'LIST VIEW CONTROLS' menu is open, showing the 'New' option selected. A 'New List View' dialog box is overlaid on the interface. The dialog box has a title bar 'New List View' and contains the following elements:

- A text input field for 'List Name' with the value 'Appointments to be cancelled'.
- A section titled 'Who sees this list view?' with three radio button options:
  - Only I can see this list view
  - All users can see this list view
  - Share list view with groups of users
- 'Cancel' and 'Save' buttons at the bottom.

# 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**.

6

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# 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**.

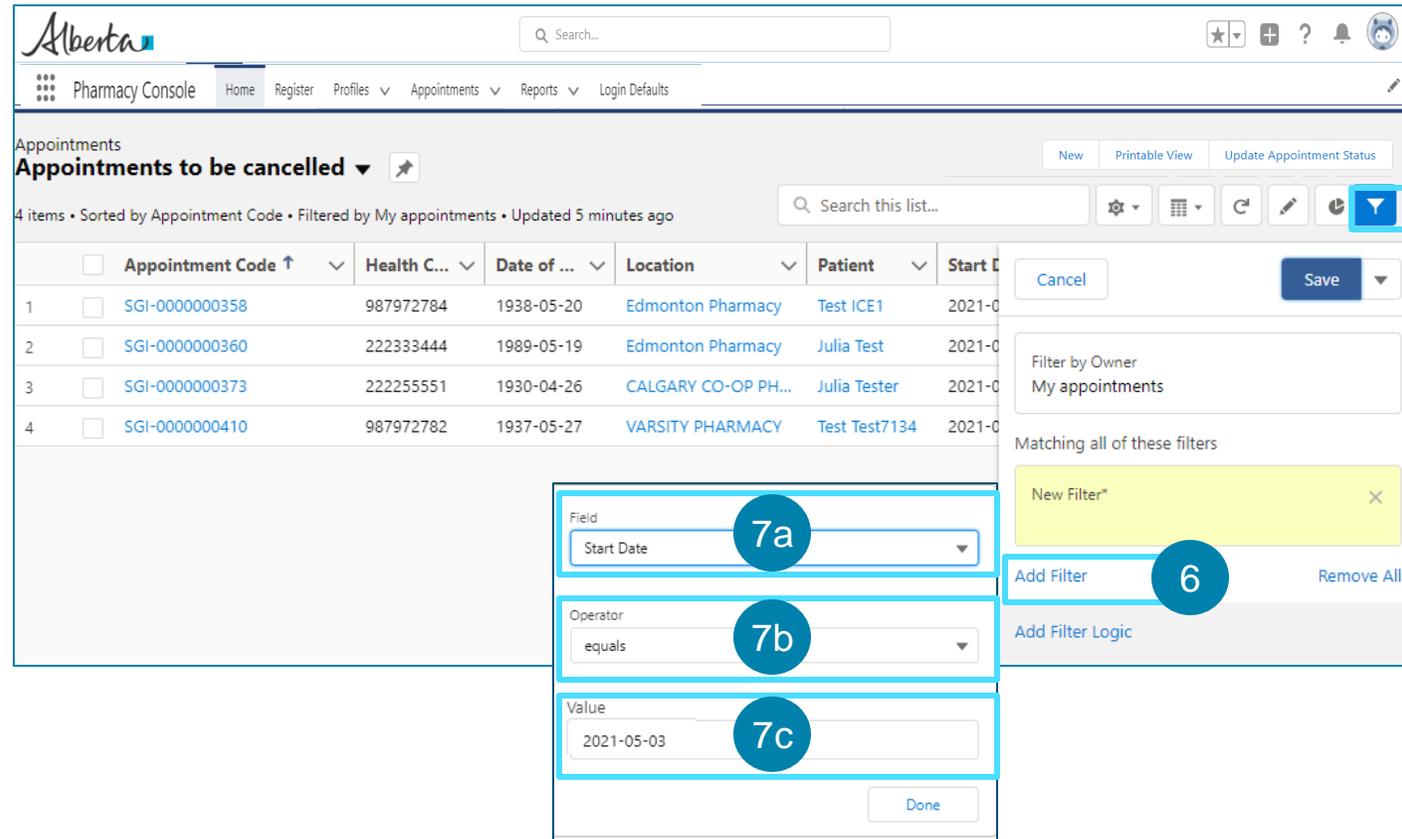
7a Select **Start Date** from the Field drop-down menu.

*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.



The screenshot shows the Alberta Pharmacy Console interface. The main content area displays a list of appointments titled "Appointments to be cancelled". The list has 4 items, sorted by Appointment Code, and filtered by "My appointments". The table columns are Appointment Code, Health C..., Date of..., Location, Patient, and Start Date. The appointments listed are:

|   | Appointment Code | Health C... | Date of ... | Location            | Patient       | Start Date |
|---|------------------|-------------|-------------|---------------------|---------------|------------|
| 1 | SGI-0000000358   | 987972784   | 1938-05-20  | Edmonton Pharmacy   | Test ICE1     | 2021-0...  |
| 2 | SGI-0000000360   | 222333444   | 1989-05-19  | Edmonton Pharmacy   | Julia Test    | 2021-0...  |
| 3 | SGI-0000000373   | 222255551   | 1930-04-26  | CALGARY CO-OP PH... | Julia Tester  | 2021-0...  |
| 4 | SGI-0000000410   | 987972782   | 1937-05-27  | VARSITY PHARMACY    | Test Test7134 | 2021-0...  |

A filter dialog is open, showing the "Add Filter" button (6) and the "New Filter\*" box. The filter dialog has three sections: "Field" (7a) with "Start Date" selected, "Operator" (7b) with "equals" selected, and "Value" (7c) with "2021-05-03" entered. The "Done" button is visible at the bottom of the filter dialog.

# 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.*

The screenshot shows the Alberta Pharmacy Console interface. At the top, there is a search bar and navigation tabs for Home, Register, Profiles, Appointments, Reports, and Login Defaults. The main content area displays a list of appointments under the heading "Appointments to be cancelled". The list has 4 items, sorted by Appointment Code, and filtered by "My appointments". The table columns are Appointment Code, Health C..., Date of..., Location, Patient, and Start Date. A filter configuration dialog is open, showing the following settings: Field: Start Date, Operator: equals, Value: Today. A "Done" button is highlighted with a blue circle labeled "8".

|   | Appointment Code                        | Health C... | Date of ... | Location | Patient | Start Date |
|---|---|-------------|-------------|----------|---------|------------|
| 1 | <input type="checkbox"/> SGI-0000000358 | 987972784   | 1938-05-20  |          |         |            |
| 2 | <input type="checkbox"/> SGI-0000000360 | 222333444   | 1989-05-19  |          |         |            |
| 3 | <input type="checkbox"/> SGI-0000000373 | 222255551   | 1930-04-26  |          |         |            |
| 4 | <input type="checkbox"/> SGI-0000000410 | 987972782   | 1937-05-27  |          |         |            |

Filter configuration dialog details:

- Field: Start Date
- Operator: equals
- Value: Today
- Done button (circled 8)

Filter configuration dialog 9a details:

- Field: Record Type
- Operator: equals
- Value: Appointment
- Done button

Filter configuration dialog 9b details:

- Field: Location
- Operator: equals
- Value: Edmonton Clinic
- Done button

Filter configuration dialog 9c details:

- Field: Status
- Operator: equals
- Value: 1 option selected
- Done button

# 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*.*

A screenshot of the Alberta Pharmacy Console interface. The top navigation bar includes "Alberta", "Pharmacy Console", and various menu items like "Home", "Register", "Profiles", "Appointments", "Reports", and "Login Defaults". The main content area is titled "Appointments" and shows a list view of appointments. The list has columns for "Appointment Code", "Health C...", "Date of ...", "Location", "Patient", and "Start D". There are four items listed. A filter dropdown menu is open over the "Appointment Code" column, showing "Filter by Owner" with three options: "All appointments" (selected), "My appointments", and "Queue owned appointments". A "Done" button is at the bottom of the filter menu. To the right, a filter configuration panel is visible, showing "Filter by Owner" set to "My appointments" and a list of other filters: "New Filter\*", "Start Date\*" equals "Today", "Record Type\*" equals "Appointment", and "Location\*" equals "Edmonton Clinic". There are "Add Filter" and "Remove All" buttons at the bottom of the filter panel. A "Save" button is highlighted with a blue box and a "12" callout. A "Cancel" button is also visible. A "10" callout points to the "All appointments" option in the filter menu, and a "11" callout points to the "Done" button.