Overview of Scheduler

AVBS User Guide – Health Care Provider and Provincial Operations

As of September 24th, 2024

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

📞 1-855-643-8649

✉️ eHealthProviderSupport@gov.ab.ca

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

📞 1-877-311-4300

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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 Personal Health Number (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

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Overview of Scheduler: Overview

Objectives:	To provide an overview of Scheduler and how to set up a General or Vaccine-Specific Appointment Schedule.
AVBS Role:	Health Care Provider and Provincial Operations
Pre-Requisite:	Facility record needs to be available in AVBS

Note: The term Immunization site used throughout this user guide refers to pharmacies and AHS Immunization physician offices.

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Overview of Scheduler

In order to accept bookings at an Immunization site, it is important to set up the time slots that will allow Albertans to book their Immunization appointments. These time slots are referred to as Appointment Blocks in AVBS. You can set up appointment blocks using Scheduler.

The **Scheduler** tab found on a facility's record page has 2 sections: **Vaccine Capacity Settings** and **Create time slots for this facility.** Under **Vaccine Capacity Settings**, you can do the following:
- Select available vaccines
- Add new a new vaccine to your facility that patients can book and available dates to book

Overview of Scheduler

In order to accept bookings at an Immunization site, it is important to set up the time slots that will allow Albertans to book their Immunization appointments. These time slots are referred to as Appointment Blocks in AVBS. You can set up appointment blocks using Scheduler.

The **Scheduler** tab found on a facility's record page has 2 sections: **Vaccine Capacity Settings** and **Create time slots for this facility.** Under **Create time slots for this facility** , you can do the following:

- Set up appointment days for an entire week from one screen
- Set up and modify custom and non-custom appointment blocks
- View all the appointment blocks for the day on one screen and update them
- View booked appointments for each appointment block
- Cancel booked appointments within an appointment day from one screen
- Ability to set up appointment blocks for the future and leave them at Planned/Inactive status to be activated later
- Useful when you need to set up/modify appointment blocks for multiple days
- Ability to Clone, Delete, Add Time Interval or Modify Blocks from previous weeks or specific days within the week. These can only be used after days are selected from the calendar

	Pharmacy Console	Home	Register	Profiles ⌄	Appointments ⌄	Reports ⌄	

Profile
101 PHARMACY
Edit

Create time slots for this facility

Appointment Type: General ⌄

Current Week | < | Week starting September 📅 | >   ⓘ Total: 2 / 279

	Start Time	End Time	Duration per block (minutes)	Capacity per block	Total Capacity	Booking Counter ⓘ	Custom Block	Status
☐ Monday September 16, 2024	🕐	🕐					-- Please select an option -- ⌄	-- Please select an option -- ⌄
☐ Tuesday September 17, 2024	🕐	🕐					-- Please select an option -- ⌄	-- Please select an option -- ⌄
☐ Wednesday September 18, 2024	🕐	🕐					-- Please select an option -- ⌄	-- Please select an option -- ⌄
☐ Thursday September 19, 2024	12:00 a.ı 🕐	3:30 a.ı 🕐	View the custom block	View the custor	42	0	Yes	Active ⌄
☐ Friday September 20, 2024	12:00 a.ı 🕐	3:30 a.ı 🕐	View the custom block	View the custor	42	1	Yes	Active ⌄
☐ Saturday September 21, 2024	12:00 a.ı 🕐	8:00 a.ı 🕐	View the custom block	View the custor	90	0	Yes	Active ⌄
☐ Sunday September 22, 2024	12:00 a.ı 🕐	4:15 p.ı 🕐	View the custom block	View the custor	105	1	Yes	Active ⌄

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How to Navigate to Scheduler

To navigate to the AVBS Scheduler, follow the steps below:

1 Click on **Profiles**

2 Click on the **Profile Name** from the List.

The Facility Record will display.

Click the **Scheduler** tab.

3 *The Appointment Scheduler will display.*

Features of Scheduler

4 The **Scheduler** tab found on a facility's record page has 2 sections: **Vaccine Capacity Settings** and **Create time slots for this facility.** Under **Vaccine Capacity Settings** , the following information is displayed in a table:

4a **Vaccine Type & Name**

4b **Quantity:** the units of vaccine doses available at the facility.

4c **Date Range:** the period during which the vaccines will be available.

4d Columns for each day of the week from **Monday–Sunday**: Select the days of the week that each vaccine will be available.

4e **New** button: This is to add a new vaccine that will be available at the facility. *Refer to next page.*

Profile
101 PHARMACY

Vaccine Capacity Settings (7)
Updated 42 minutes ago

		Vaccine Type & Name	Quantity (...	Date Range	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
1	☐	Influenza High Dose Influenza	1	2024-09-10 to 202...	☐	☐	☐	☐	☐	☑	☑	▾
2	☐	COVID-19 XBB covid 12+	30	2024-09-12 to 202...	☑	☑	☑	☑	☑	☑	☑	▾
3	☐	COVID-19 XBB 5Y11Y XBB 5Y	50	2024-09-19 to 202...	☑	☑	☑	☑	☑	☑	☑	▾
4	☐	Influenza INF	40	2024-09-20 to 202...	☑	☑	☑	☑	☑	☑	☑	▾
5	☐	COVID-19 XBB 6M4Y covid 6m-4y	60	2024-09-20 to 202...	☑	☑	☑	☑	☑	☑	☑	▾
6	☐	Tdap TDAP Daily1	5	2024-09-17 to 202...	☑	☑	☑	☐	☑	☐	☑	▾
7	☐	Pneumococcal pneumococcal daily	20	2024-09-17 to 202...	☑	☑	☑	☑	☑	☑	☑	▾

View All

Features of Scheduler

4e The **Scheduler** tab found on a facility's record page has 2 sections: **Vaccine Capacity Settings** and **Create time slots for this facility.** Under **Vaccine Capacity Settings** , the following information is displayed in a table:

i **Name:** type the vaccine name

ii **Vaccine Type:** select from the vaccine types available at the facility.

iii **Quantity:** set the units of vaccine doses currently available at the facility.

iv **Date Range:** set the period during which the vaccines will be available.

v Columns for each day of the week from **Monday–Sunday**: Select the days of the week that each vaccine will be available.

Click **Save** when you have made all applicable selections to the new vaccine, and it will appear on the main page

New Vaccine Capacity Setting: Current

* = Required Information

Information

i *Name
Covid xbb 12+

ii *Vaccine Type
COVID-19 XBB (12+)

iii *Quantity (Daily Dose Count)
20

iv *Start Date
2024-09-18
*End Date
2024-09-26

Owner
O'carroll Elizabeth

v Mon ☑ Tue ☑ Wed ☑ Thu ☑ Fri ☑ Sat ☑ Sun ☑

Cancel   Save & New   Save

System Information

Features of Scheduler

5 The following are the features of the **Scheduler**:

5a Clicking the **Current Week** button takes you to the current week view. *It will be inactive when you are already in the current week.*

5b **Left** and **right arrows** allow you to view the scheduler for the previous week and next week, respectively.

5c **Total Bookings/Total Weekly Capacity** on the right displays the total bookings compared to the total capacity for the week.

5d A dedicated row for each day of the week from **Monday–Sunday** allows you to set the appointment blocks for each day of the selected week from one screen.

5e **Start Time** enables you to select the start time of the appointment block for the day.

5f **End Time** enables you to select the ending time of the appointment block for the day.

9

Features of Scheduler (Continued)

5h **Duration per block (minutes)** column enables you to enter the duration of each appointment block in minutes. The up-down arrow allows you to increase or decrease the value you enter by

5i **Capacity per block** column enables you to enter the capacity of each appointment block. The up-down arrow allows you to increase or decrease the value you enter by 1.

5j **Total Capacity** is an auto-calculated field representing total capacity for that day.

5k **Booking Counter** is an auto-calculated field representing total appointments already booked from the appointment block.

5l **Custom Block** column enables you to customize the individual block. Selecting **Yes** will allow you to create the custom appointment blocks. Selecting **No** will mean the appointment blocks that are being set up are non-custom appointment blocks.

Features of Scheduler (Continued)

5m

Status column is where you will select the status of the appointment blocks before you save them. The different statuses include:

Planning: Use this status when you want to plan ahead for setting up appointment days but don't want to make them available for booking yet.

Active: Use this status to make the appointment days available for booking.

*Completed: Use this status to indicate that the capacity for the appointment day is full/complete. The system **will not** set this status automatically when all appointment days are booked.*

*Cancelled: Use this status when the appointment days are cancelled or deleted. The system **will not** set this status automatically when appointment days are deleted.*

Inactive: Use this status to disable the appointment days from making them available for booking.

Note: Completed and Cancelled statuses are used for reporting purposes. Changing the status to Completed or Cancelled does not impact capacity or the booking counter. Any status besides Active renders all time slots unavailable on the booking portal.

Creating General Appointment Schedules

A facility can create a General Appointment Schedule to manage a single schedule for multiple vaccine types.

To create an **Appointment Schedule**, follow the steps below:

1 Click on the drop-down arrow in the **Appointment Type** field and select **General**.

2 Set up general **appointment blocks** based on the availability of vaccines and resources at your facility.

*For detailed instructions on how to set up appointment blocks, refer to the **How to Manage Appointment Blocks Using Scheduler** User Guide.*

Appointment Type: General ▼ **1**

2

Current Week ‹ Week starting September 📅 › ⓘ Total: 0 / 0

	Start Time	End Time	Duration per block (minutes)	Capacity per block	Total Capacity	Booking Counter ⓘ	Custom Block	Status
☐ Monday September 16, 2024	🕐	🕐					-- Please select an option -- ▼	-- Please select an option -- ▼
☐ Tuesday September 17, 2024	🕐	🕐					-- Please select an option -- ▼	-- Please select an option -- ▼
☐ Wednesday September 18, 2024	🕐	🕐					-- Please select an option -- ▼	-- Please select an option -- ▼
☐ Thursday September 19, 2024	🕐	🕐					-- Please select an option -- ▼	-- Please select an option -- ▼
☐ Friday September 20, 2024	🕐	🕐					-- Please select an option -- ▼	-- Please select an option -- ▼
☐ Saturday September 21, 2024	🕐	🕐					-- Please select an option -- ▼	-- Please select an option -- ▼

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Set up Appointment Blocks

1 Set up **appointment blocks** based on availability of vaccines and resources at your facility.

*For detailed instructions on how to set up appointment blocks, refer to the **How to Manage Appointment Blocks Using Scheduler** User Guide.*

!

The appointment blocks created will appear as available for the vaccine appointment type that schedule is created for.

Cloning Appointment Schedules

For facility schedules that do not tend to change from week to week, this tool now enables the ability to clone weekly schedules as well as set up recurring schedules.

This new functionality will improve efficiency in setting up schedules for upcoming weeks.

2 In case you want to clone a block from previous weeks or specific days within the week, select the days you are planning to clone, and click on the **Clone button.**

3 After the system clones the selected days, you will receive a confirmation message.

Cloning Appointment Schedules (Continued)

4 Choose the **Start and End Date** to specify the range of recurrence and confirm your selection. The Start Date will default to the Monday following the week being cloned.

The start and end dates must be in the future, and the end date needs to be after the start day, otherwise, you will receive an error message.

The number of days selected to clone needs to be the same number of days between the start and end date, otherwise, the additional dates will appear blank.

5 In case you attempt to clone new availability onto dates that already have a schedule set up, an error message will appear.

If there is a need to have a new availability on any day, you will need to delete the current one before the clone. The system will only clone days that do not overlap with already existing schedules.

Clone Week starting September 16, 2024

Please select a start and end date to specify the range of recurrence. The schedule from the selected week will be copied into this range. You can clone up to 30 days at a time.

Note: If there is an existing block within this time period, cloning will not be possible. You will need to either use the 'Delete' function to remove this block or 'Add' function to manually create the schedules for the additional days

Selected Days

| Tue | Wed | Thu | Fri |

*Start Date: Sep 23, 2024
*End Date: Sep 28, 2024

Cancel   Confirm

Warning
One or more of the selected dates could not be cloned.

Return Message

The following days were not cloned because the same date already exists:
• Friday September 27, 2024

15
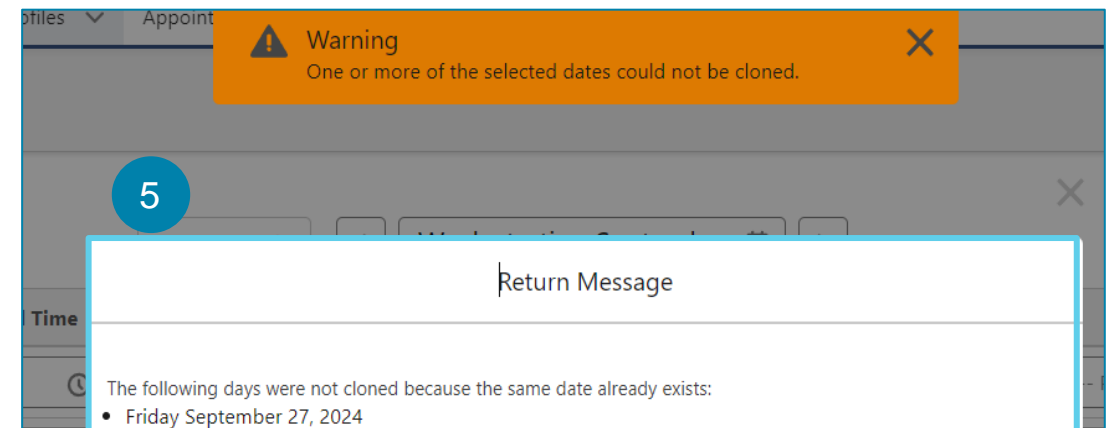
Cloning Appointment Schedules (Continued)

6 While cloning, if you select days without any data an error message will appear on your screen.

	Start Time	End Time	Duration per block (minutes)	Capacity per block	Total Capacity
☐ Monday September 16, 2024	🕐	🕐			
☐ **6** September 17, 2024	🕐	🕐			
☑ Wednesday September 18, 2024	🕐	🕐			

⚠ **Warning**   ✕
One or more of the selected dates could not be cloned.

Return Message

The following days were not cloned because the same date already exists:
- Friday September 27, 2024

Add Time Intervals

With this new functionality, you will be able to add availability in bulk to new or existing days.

1 To add time intervals, first, specify the days out of the selected week in which you would like to add availability, and then select the **Add Time Interval button.**

This functionality applies for existing days or days that have not been set up yet.

Add Time Intervals (Continued)

(2) When the Add Time Interval window appears, the **Start and End Time** fields are used to set the time interval for the new block of available appointments.

The **Duration** is used to set the time of each time slot in minutes.

The **Capacity** allows for the number of appointments available in each time slot to be defined.

Status options can be **Active or Inactive**. To have this time interval available, the status of this should be Active.

For time intervals, it is important to remember that the time added to a day cannot overlap with the existing time that day already has set up.

Example: If the appointment availability for a day is from 8 am to 5 pm, your interval can only be set up before 8 am or after 5 pm.

(3) If you add a time interval that overlaps an existing schedule you will receive an error.

Add Time Interval

specify the availability you would like to add. Note: If you are adding new times that overlap with the existing ..le, then only times that do not overlap will be created.

* Start Time
8:00 AM

* End Time
9:00 AM

* Duration per appointment (mins)
10

* Capacity per appointment
1

* Status
Active

⚠ **Warning**
One or more of the selected time slots could not be created

Return Message

The following appointment times were not created because it overlaps with an existing appointment time slot(s).

- Monday September 23, 2024 10:00 AM – 10:30 AM
- Thursday September 26, 2024 10:30 AM – 11:00 AM

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Add Time Intervals (Continued)

4

The duration of the appointment must be less than or equal to the difference between the **Start and End Time.**

Example: If my time interval is from 9:00 AM to 10 am (60 minutes), my duration must be equal to or less than 60 minutes otherwise I will receive an error.

Additionally, if the difference between the Start and End Time is not divisible by the duration, then the Scheduler will create as many appointments as possible within the time slot and leave the remainder.

Example: Start Time = 7:00 am and End Time = 8:00 am, Duration = 25 min. The Scheduler will create two appointment time slots for 7:00 am to 7:25 am and 7:25 am to 7:50 am and will not create a time slot from 7:50 am to 8:00 am.

Add Time Intervals (Continued)

5 To review your time intervals, change the Custom Block field option from No to Yes and click on Yes to review it.

6 Inside the Custom Block section, you will also have the possibility of adding more blocks or modifying existing ones.

Classification: Protected A

Delete Appointment Blocks

With this new feature, you will be able to delete an entire day or a specific time interval in the day.

1 The **Delete button** at the bottom of the scheduler screen provides the ability to remove all time slots or time slots over a specific time range on a given day. If the time slot has an existing appointment, deletion will not be possible.

To Delete an appointment, first, specify the days out of the selected week to be deleted and select the **Delete button.**

Classification: Protected A

Delete Appointment Blocks(Continued)

2 After clicking the Delete button, you will have 2 options available:

A) Delete All Day time blocks considering there are no appointments scheduled.

B) Delete Selected Times to delete blocks over a given range.

3 Remember, if the time slot has an existing appointment, deletion will not be possible, and an error message will appear.

2

A)

Delete Appointments

Please confirm you want to delete 1 day(s). Note: If there is an existing appointment within this time period, deleting will not be possible. You must cancel the appointments first before deleting.

Select Time
◉ All Day ○ Select times

B)

Delete Appointments

Please confirm you want to delete 1 day(s). Note: If there is an existing appointment within this time period, deleting will not be possible. You must cancel the appointments first before deleting.

Select Time
○ All Day ◉ Select times

⚠ **Warning**
One or more of the selected appointment time slots could not be deleted. ☒

3

Return Message

The following appointment time slots were not deleted because there are appointment(s) scheduled on this date. Please cancel or reschedule these appointments before deleting:

- Monday September 23, 2024 8:00 AM – 8:20 AM (1)

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Delete Appointment Blocks(Continued)

4 For the Select Times option, the End Date must be after the Start Date otherwise you will receive an error.

5 In case you are trying to delete a day or time slot that has not been set up, you will receive an error message.

6 The system will only delete the time slots that do not contain any confirmed appointments.

In case you are trying to delete a time slot with an existing appointment, you will receive an error message.

4

Delete Appointments

Please confirm you want to delete 6 day(s). Note: If there is an existing appointment within this time period, deleting will not be possible. You must cancel the appointments first before deleting.

Select Time
○ All Day   ● Select times

Start Time
7:00 am

End Time
6:00 am
The end time must be after the start time

Cancel   Confirm

5

6

⚠ Warning
One or more of the selected appointment time slots could not be deleted. ✕

Return Message

The following days were not deleted because the record(s) do not exist.

• Wednesday September 25, 2024

The following appointment time slots were not deleted because there are appointment(s) scheduled on this date. Please cancel or reschedule these appointments before deleting:

• Monday September 23, 2024 8:00 AM – 8:20 AM (1)

Close

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Modify Appointment Availability

With this feature, you will now be able to modify the capacity or status of an entire day or specific time intervals on a given day.

To Modify an appointment, select the Modify Blocks button at the bottom of the scheduler screen.

Modify Appointment Availability (Continued)

ii Appointments can be modified by a full day or specific blocks.

To modify a full day, select the **All-Day** option, or to modify by specific blocks, choose **Select Time.**

After that, you will have the possibility to modify the capacity and the status of your selection. The capacity can be set to zero.

iii If you select All Day, the Start and End Time will be hidden.

ii

Modify Appointment Availability

Please confirm you want to adjust the appointment availability for 1 day(s). Note: If there is an existing appointment within this time period, your new capacity must be equal to or greater than the number of appointments booked.

Select Time

○ All Day   ⦿ Select Time

* Start Time   * End Time

□ Capacity per block   □ Status

                                      Please select an option ▼

iii

Modify Appointment Availability

Please confirm you want to adjust the appointment availability for 1 day(s). Note: If there is an existing appointment within this time period, your new capacity must be equal to or greater than the number of appointments booked.

Select Time

⦿ All Day   ○ Select Time

□ Capacity per block   □ Status

                                      Please select an option ▼

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# Modify Appointment Availability (Continued)

4 In case you are trying to modify a time slot that does not contain appointment availability, you will get an error message.

4

5 Additionally, the new capacity that you insert, must be greater or equal to the number of appointments currently booked.
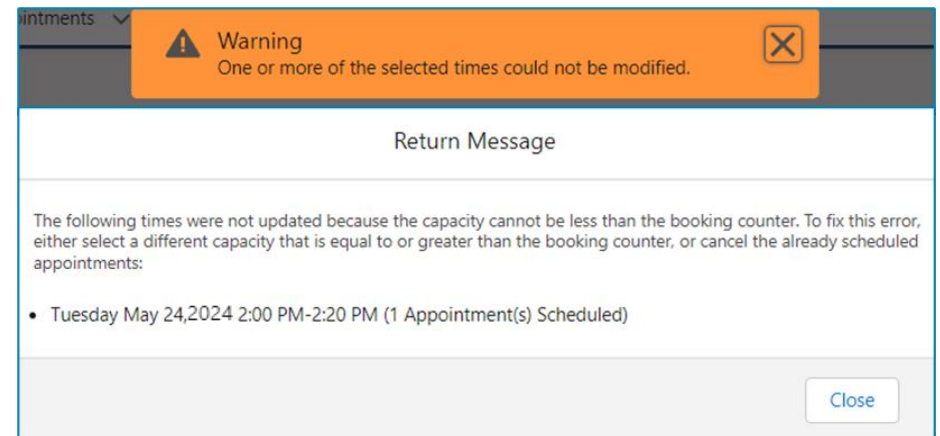
In case you try to insert a smaller capacity, you will receive an error message.
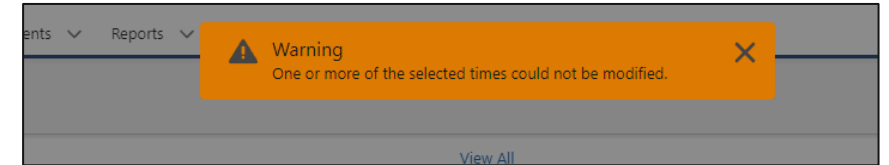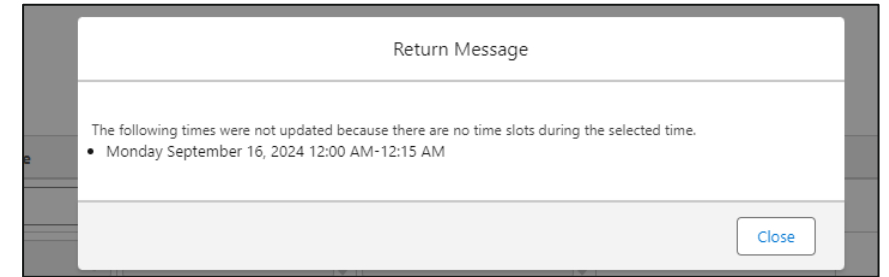
5

Minimum Lead Time Feature

For same-day appointments, this is the minimum space between the moment a person books an appointment and the appointment time. This to ensure sufficient time to prepare vaccines and manage walk-ins as required

i To include a Minimum booking window, click on the **Details** section to visualize the **Calendar Availability Settings.**

Minimum Lead Time Feature

For same-day appointments, this is the minimum space between the moment a person books an appointment and the appointment time. This to ensure sufficient time to prepare vaccines and manage walk-ins as required

(1) To include a Minimum booking window, enter the minimum lead time in **the Minimum Booking Lead Time (mins)** field under the **Details** section.

Minimum Lead Time Feature

2 *Example without lead time:*

A patient entered the platform at 3.20 pm to book an appointment

As a result, the patient will be able to book an appointment for that same time

Classification: Protected A

Overview of General Appointment Schedules

Overview
The **General Appointment Schedule** allows facilities to: • Set up **one schedule** for **one or more vaccine types.** e.g., a facility sets up a General Appointment Schedule that has 20 available appointment blocks over the course of the day, that offers both Pfizer and Influenza.

Considerations
• The **Vaccine Capacity Settings** field on the facility record must be monitored and updated regularly to reflect the vaccine availability. • Each appointment block created will be tagged to **all vaccine types** populated in the **Available Vaccines** field.

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