



How to Schedule a Clinic



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The Ncompass clinic is a versatile tool that allows you to schedule a variety of different types of events depending on your particular requirements.

However, not all Telemedicine Coordinators are able to accommodate an Ncompass clinic through Ncompass.

It is imperative that you determine how they will receive patient information prior to scheduling the event.



Clinical Introduction

When scheduling a Clinic, there are some systems that require a Bridge (for instance OTN members that have off net systems). Events including these type of systems need to be scheduled by 3 pm the day prior to the event occurring. Furthermore, the event has to be scheduled within OTN business hours. If you attempt to schedule the day of the event, Ncompass will display a message indicating that a Bridge is required. In this case, please contact OTN scheduling services for assistance.

Initiating an Ncompass Clinic

Welcome to Ncompass, larry learner

Calendar

Wednesday June 23, 2010 : All Systems

12 am

1 am

2 am

3 am

4 am

5 am

10 am

11 am

12 pm

1 pm

2 pm

3 pm

4 pm

5 pm

6 pm

7 pm

8 pm

9 pm

10 pm

11 pm

Non-Clinical Events

- Create Multipoint
- Create Point-to-Point

Clinical Events

- Create Point-to-Point
- Create Ncompass Clinic

Requests

- Request Clinical
- Request Non-Clinical
- View Saved Requests
- View Sent Requests

Resources

- Public Events
- Reports
- Documents

Message of the day

What's New: Finding it slow opening certain fields in Ncompass? [Click here](#) to see

When arranging and scheduling clinical events with other sites for the first time it is imperative that you get their consent for the event. Once an agreement has been reached, follow these steps to schedule your clinical event within Ncompass.

[1] Select the "Create Ncompass Clinic" button located under the **Clinical Events** heading on the navigational toolbar. When clicking on the link, a page entitled "Create Clinic Event" will appear.

to Ncompass, larry learner

Create Clinic Event

Participants [Click here for Help](#)

Please select yourself as the event's requestor.

Requestor* :

2

3

Contact

Create New Contact

Name first name/last name

Contact Type

- Allied Health Professional
- Chair
- Local IS Support
- OTN Support
- Physician
- Speaker
- Specialist

Contact Status

- Active
- Historical
- Inactive

[2] Click the “Select Requestor” button and select your own name as the requestor to ensure that participants know who to contact if there are questions regarding the event.

[3] To locate your name, enter the first few characters from your first name and last name.

Search Contact

Name first name/last name

Contact Type

- Allied Health Professional
- Chair
- Local IS Support
- OTN Support
- Physician
- Speaker
- Specialist
- Telemedicine Coordinator

Contact Status

- Active
- Historical
- Inactive

Region City

Phone or Fax e. Language

Notes

[4] Click the “Search” button and a list of results will appear at the bottom of the screen.

[5] Select yourself by clicking on your name from the list. Your name will now populate the requester field.

1 records found. A maximum of 100 records will be returned. Please click on contact name to select a con

#	Name	City	Phone	Fax	Type
1.	Learner, Larry Mr.	Toronto	416-123-4567x987	-	Chair, Speaker

ass, larry learner

Create Clinic Event

Participants [Click here for help with](#)

Please select yourself as the event's requestor.

Requestor* : Larry Learner 6

Consultant* : 7

Clinic Details [Click here for help with](#)

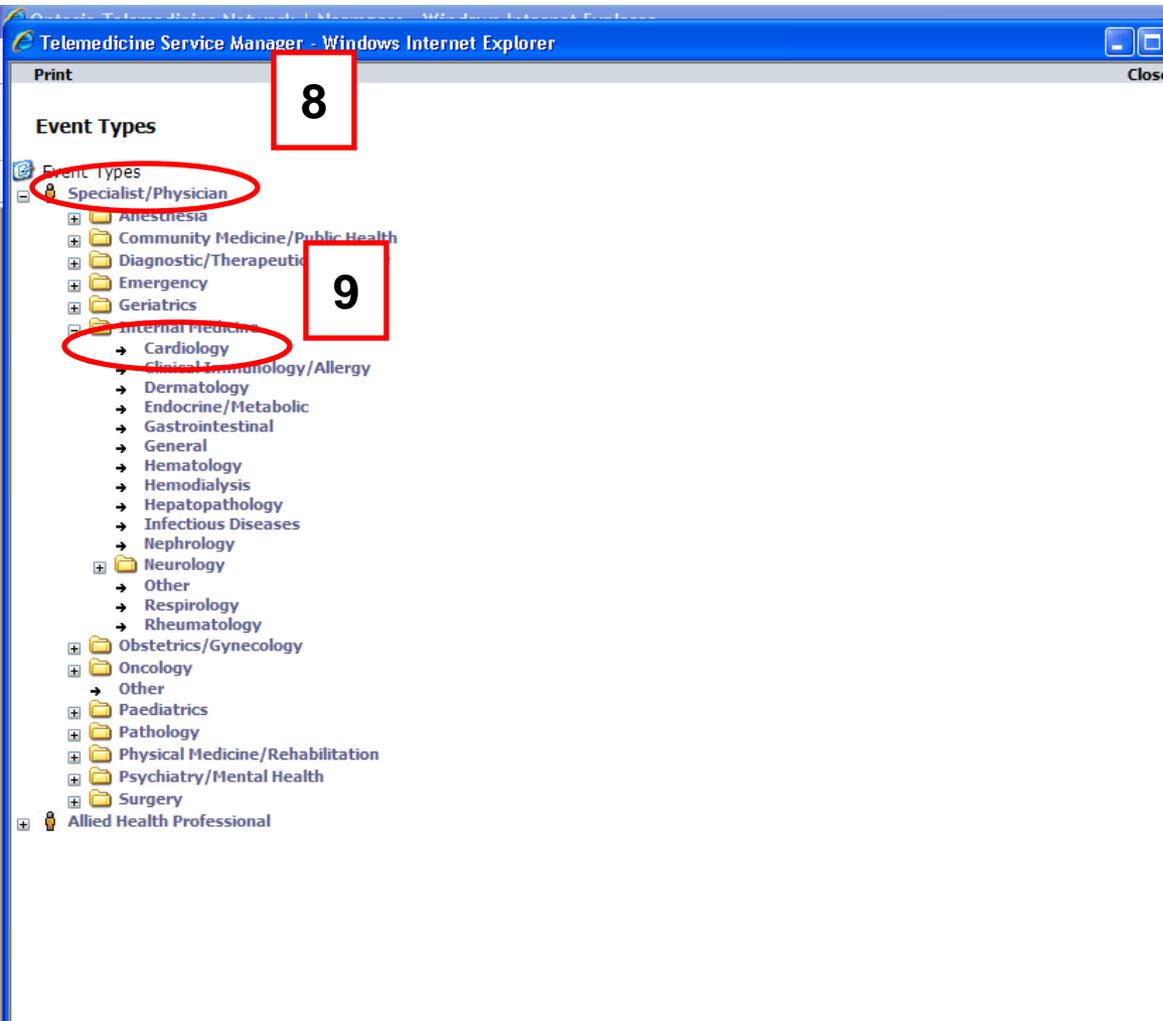
Event Type* :

Clinic Type : Serial Group
Group - All patients seen at once
 Serial - Patients seen one after another

Purpose* :

[6] The consultant is the medical professional the patient will see during the appointment. To include a consultant, you will need to select them from a registry of known consultants/allied health professionals. Click on the "Select Consultant" button beside the consultant data field. If you select a consultant that is a TMC consultant, their event type will automatically fill in

[7] The event type categorizes the type of consult you are scheduling and is used for reporting purposes. You will need to select an event type by clicking on the "Select type" button beside the **Event Type** field. This will provide you with an event type selection screen.



[8] By clicking on the "+" sign that appears before your selection, choose the event type that best describes your consultant – either a specialist/physician or allied health professional.

[9] Once you have made your selection, the screen will expand to reveal more options. In the following example, we have selected "Specialist/Physician" and then clicked on the plus "+" sign in front of "Internal Medicine". From here we are able to select **Cardiology** by clicking on the highlighted field with the mouse.

Create Clinic Event

Participants Click here for help with i

Please select yourself as the event's requestor.

Requestor*: Select Requesto

Consultant*: Select Consultar

Clinic Details Click here for help with i

Event Title:

Event Type*: Select Type

Clinic Type: Serial Group s seen at once

Purpose*: s seen one after another

Priority*: Elective Urgent/Emergent Need help selecting the appropriate pri

Date of Event*:

Scheduled Event:

24 Hour Format, HHMM

Start Time*:

End Time*:

Start Call Yes No Note that all multipoint clinics will be initiated automatically by the bridge

Automatically?:

[10] The “Clinic Type” selection allows you to choose whether you want to schedule patients one after the other, or all together in a group. The default is set to “Serial” . However, in an educational event the most appropriate selection would be “Group”.

[11] The “Purpose” field is used to describe the kind of appointment. In an Ncompass clinic you will need to select the purpose that would best describe the majority of patients in the clinic, and then you would be able to modify individual patients if you decided to include the patient appointments.

Clinic Details
Click here for help with this section ?

Event Title:

Event Type*: Select Type

Clinic Type: Serial Group
Group - All patients seen at once
Serial - Patients seen one after another

Purpose*: ▼

Priority*: Elective Urgent/Emergent Need **13** selecting the appropriate priority code?

Date of Event*: dd-mm-yyyy

Scheduled Event.

0700

24 Hour Format, HHMM

0800

Start Time*:

End Time*:

Start Call Yes No Note that all multipoint clinics will be initiated automatically by the bridge

Automatically?:

Consultant System
Click here for help with this section ?

You can only select systems that are not ISDN

[13] In the “Date of Event” field, you can click the calendar icon or manually enter the date by using the convention of day, month and year.

[14] The “Start” and “End Time” fields need to be entered using the 24-hour format. When creating Ncompass clinics, the start time and end time are for all patients attending that clinic and their appointments will fall within this allotment of time.

Clinic Details [Click here for help with this section](#)

Event Title:

Event Type*:

Clinic Type: Serial Group
Group - All patients seen at once
 Serial - Patients seen one after another

Purpose*:

Priority*: Elective Urgent/Emergent Need help selecting the appropriate priority code?

Date of Event*: dd-mm-yyyy

Scheduled Event:

0700 Start Time* 24 Hour Format, HHMM 0800 End Time*

15

Start Call Automatically? Yes No Note that all multipoint clinics will be initiated automatically by the bridge

Consultant System [Click here for help with this section](#)

You can only select systems that are not ISDN

[15] "Start Call Automatically" can be used to connect and disconnect clinical events at the times indicated in the "Start" and "End Time" fields without manual intervention. The default setting is set to "No". Select the "Yes" option if you are scheduling a point-to-point event and you require the videoconference event to begin automatically. Please note, that both systems need to be turned on order for the connection to be made successful. The "Start Call Automatically" selection is irrelevant if your videoconference is a multipoint event, as all multipoint clinics are initiated automatically.

Scenario Telemedicine Network | Ncompass

Consultant System

You **16** y sele

Search Site/System **17**

Name Site or system name

Site Class

Address

Region

Connection Type Off-Net IP Gateway Off-Net IP SBC On-Net IP VPN-e On-Net IP VPN-s O

Connection Speed Kbps

Clinical Use Either Yes No

Administrative Use Either Yes No

Educational Use Either Yes No

System Status Active Being Tested Certified De Inactive Not Certified Not in Use

Notes contain

Patient System(s)

System 1

Event Log

[16] To select a system for the consultant, click on the magnifying glass icon with the “+” sign. When you do so, a "Search Site/System" page is displayed.

[17] You will be able to search for the consultant system by typing the site number in the name field and clicking the search button.

Search Site/System

Name Site or system name OTN ID

Site Class

Address Postal Code

Region City

Connection TYPE Off-Net IP Gateway Off-Net IP SBC Off-Net ISDN
 On-Net IP VPN-e On-Net IP VPN-s On-Net Routerless IP

Connection Speed Kbps ISDN Number

Clinical Use Either Yes No Portal Calling Activated Either Yes No

Administrative Use Either Yes No

Educational Use Either Yes No

System Status Active Being Tested Certified Decommissioned Failed Certification
 Inactive Not Certified Not in Use

Notes contain

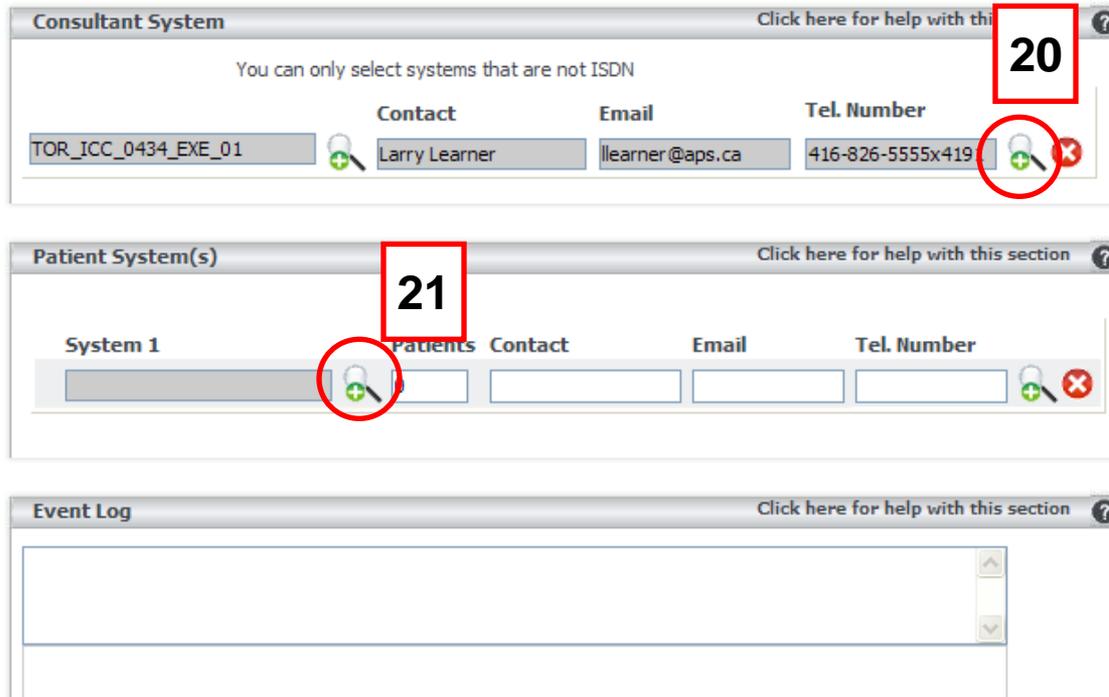
[18] Click the “Search” button to initiate the search.

[19] Select the appropriate consultant system from the search results provided. Always verify that you have selected the correct system.

1 sites and 1 systems found. Please click on system select the system.

#	Name	City	System S	Conn. Type	Conn. Speed	Clinical	Admin.	Edu.	Site Class
1.	Dr Ian Clinic	Toronto	-	-	-				Member
1.	TOR_ICC_0434_EXE_01	Toronto	Active	On-Net IP VPN-s	512				Member

Patient System(s) Section



Consultant System Click here for help with this section

You can only select systems that are not ISDN

Contact	Email	Tel. Number
TOR_ICC_0434_EXE_01	Larry Learner	416-826-5555x419

Patient System(s) Click here for help with this section

System 1	Patients	Contact	Email	Tel. Number

Event Log Click here for help with this section

[20] The consultant site coordinator can be entered manually or selected from the contact database by clicking on the magnifying glass icon with the “+” sign. If selected from the database, the contacted details will be automatically populated. Please note, that the email information is extracted from the email field when sending notifications.

[21] Click on the magnifying glass icon and select the Patient System by using the registry.

Patient System(s) Section

Consultant System [Click here for help with this section](#)

You can only select systems that are not ISDN

	Contact	Email	Tel. Number
TOR_ICC_0434_EXE_01	Larry Learner	llearner@aps.ca	416-826-5555x4191

Patient System(s) [Click here for help with this section](#)

System	Patients	Contact	Email	Tel. Number
System 1 NBY_KMC_0898_MST_01	0			
System 2	0			

Event Log [Click here for help with this section](#)

[22] Manually type the number of patients involved in the clinical event. You will be able to add the patient's particulars and appointment details once you have scheduled the event.

[23] Select the Patient's Site Coordinator from the database. This will automatically populate the Contact, Email and Telephone number fields. Alternatively, if the Site Coordinator's name is unavailable on the registry - you can manually type the details into the fields provided. As rule, if the field is white then you can input content manually.

Patient System(s) [Click here](#)

System 1	Patients	Contact	Email
NBY_KMC_0898_MST_01	2	Lucy Administrator	lucya@pop.ca
System 2	Patients	Contact	Email
	0		

24

Event Log [Click here](#)

Patient's have been confirmed for this event.

25

Schedule Event

Save Draft

[24] The “Event Log” is similar to an event's *bulletin board* in which you are able to leave and read messages regarding the event.

The Event Log automatically records the changes made to the event. It tracks the date and time of the change as well as the name of the individual(s) making the alteration.

[25] When you click on the “Schedule” button, always look at the top of the screen to ensure that your event has been successfully scheduled.

26

 Congratulations! No conflicts were detected
This request has been successfully scheduled

[<< Back to Last Calendar View](#) | [Refresh This Page](#)

Clinic Event #8525617

Clinic Details

[Click here for help with this section](#)

Date of Event: Sep 23, 2010 - 07:00 to 08:00 (no setup time)

Event Type: Internal Medicine/Cardiology

Clinic Type: Serial

Conference Mode: Participant View: Full Screen Layout

Host View: Full Screen Layout

Start Call Automatic: No

Purpose: One to One Consult

Priority: Elective

27

Requestor: Larry Learner 

Consultant: Ian Clinic 

Participant Systems

[Click here for help with this section](#)

Consultant System

Site Name	System Name	Contact Info
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[26] If the event has been scheduled successfully the status will be moved to “Scheduled”. Furthermore, you will notice that the portal calling features will be available. Your event will now appear in reports.

[27] You will be able to view contact information if you click on any of the “i” info symbols.

Ncompass Terminology

<p>Auto Initiate</p>	<p>An Ncompass feature that enables events to start and end automatically without manual intervention. This means that if you schedule an event to start at 8:00 AM, the systems involved will automatically connect at that time, provided the videoconferencing systems have been turned on.</p>
<p>Clinical Event</p>	<p>An event that directly or indirectly discloses patient information.</p>
<p>Clinic Frame</p>	<p>The actual scheduled videoconference event which contains all the details regarding the video call and includes the: date, start and end times, as well as the systems involved.</p>
<p>Multipoint</p>	<p>An event that involves more than three sites in the videoconferencing. Any multipoint event requires a bridge. A bridge acts like the hub of a wheel, bringing together the spokes or in this case the individual sites, in a videoconference. All multipoints have a clearly defined start and end time and must be scheduled at least 30 minutes before they are to occur.</p>



Ncompass Terminology

Ncompass	Ncompass is an online scheduling tool designed for OTN Members to schedule and manage videoconferencing events. It's simple to use, secure and gives OTN Members access to the same scheduling information as OTN's Scheduling Services.
Patient Appointment	An optional component which allows the clinical scheduler to add details such as the start and end time of an patient's appointment, the patient name, contact information as well as any particulars regarding the appointment. Please note, you will not be able to add patient appointment information if your clinic is a multipoint event. To do this you will need to contact Scheduling.
Point-to-point	An event that takes place between two videoconference systems and do not require the involvement of a bridge. Consequently, point-to-point calls can be scheduled at any time. Furthermore, point-to-point events provide users with portal calling features.