

Scheduling Using Ncompass

When setting up a multi-point videoconference or a video call with a room-based system, you should first **schedule** all participating systems using Ncompass. This ensures that the room is available and will not be in use (therefore avoiding a potential privacy incident).

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For further assistance and technical support, contact OTN Technical Support

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Accessing Ncompass and Logging In

You can access Ncompass from the OTNhub or directly in a browser.

1. If you are already logged in to the OTNhub,;
 - i. Click the **Scheduling** link in the top navigation menu
 - ii. Select **Self-Scheduling** from the drop-down menu.
 - iii. A new browser window/tab opens with the **Ncompass home** page. Go to step #3.
2. If you are not logged in to the OTNhub:
 - i. Open an Internet browser and go to schedule.otn.ca. The **OTNhub Log in** page appears.
 - ii. Type in you user name and password and then click the **Sign In** button. The **Ncompass home** page appears.
3. To start, click the appropriate **Create...** link in the left navigation panel:
 - **Non-Clinical Events** and
 - **Clinical Events**.

The **Event Details** page appears. The fields included on this page depend on whether you are creating a non-clinical or a clinical event, and whether it is a point-to-point (P2P) or multi-point event.

Note: For detailed instructions about using Ncompass refer to the Ncompass user guides available from the **Ncompass home page**. In the left navigation panel, click the **Documents** link in the **Resources** section.

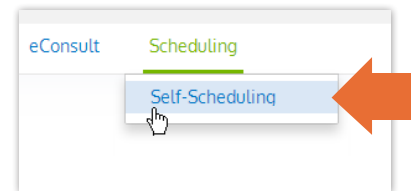


Figure 1: Self-scheduling link

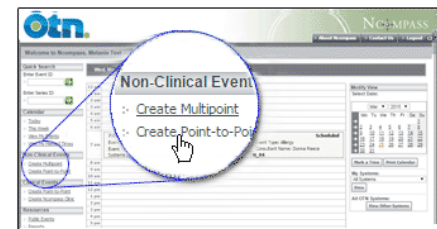


Figure 2: Ncompass home page, Non-Clinical Events links

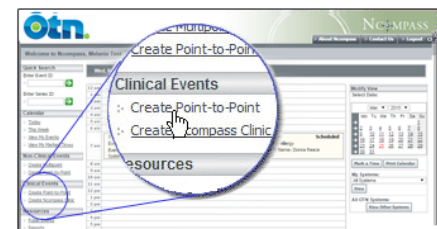


Figure 3: Ncompass home page, Clinical Events links

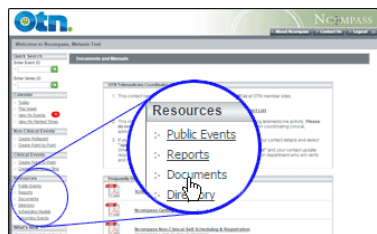



Figure 4: Ncompass documents

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Non-Clinical One-on-One Events


Fill in the fields with relevant information as explained below.

1. You are the **Organizer**. Click **Select Contact** and then search for and select your name in the Contact Registry.
2. Enter a **Date of Event**, by clicking the calendar link  and selecting a date or type a date using the format dd-mm-yyyy.
3. Enter **Start** and **End Times**, by typing the desired times using 24-hour format EST (e.g., 1400 for 2:00 p.m.).
4. Identify the **Event Details** including category, type, and title.
5. Your system is the **Host System**. The site you are calling is the **Participant System**.
 - For the **Initiating System** field, leave the default value of 'Host'.
 - If you want Ncompass to call you and the other participant to start the call, for **Start Call Automatically**, select 'Yes'
6. For each system, click **Select System** and then search for and select the relevant entries in the Site/System Registry. To search for an eVisit (Videoconference) system, in the **Site/System Search** panel:
 - i. In the **Name** field, type the person's first name or last name.
 - ii. Select **System Type** = PC Video Endpoint.
 - iii. Click **Search**.

When you select a system from the search results list, Ncompass fills in the relevant field with the system name.

7. Any notes you want visible to both yourself and the site you're calling, type in the **Notes for All Participants** field. For notes intended only for yourself and the OTN Scheduling office, type in the **My Private Notes** field.
8. To schedule the event, click **Schedule Event**.

After Ncompass schedules the event

- If there are errors or conflicts Ncompass displays warning messages at the top of the screen and will not schedule the event. Correct the error and try to reschedule.
- Successfully scheduled events appear on each participating system's Ncompass calendar.
- On the day when the event is set to start, either participant can start the call.
- Ncompass offers you an easy way to manage your events - editing, canceling, printing, and notifying participants. For full details, visit Ncompass > Resources > Documents (e.g., [Non-Clinical Self-Scheduling & Registration](#) .

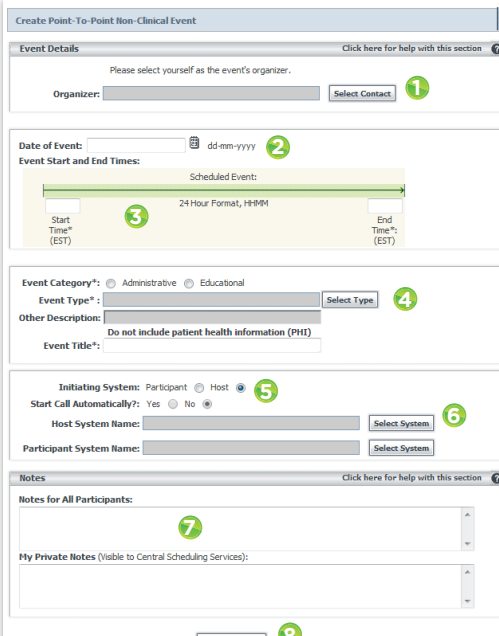


Figure 5: Create P2P non-clinical event

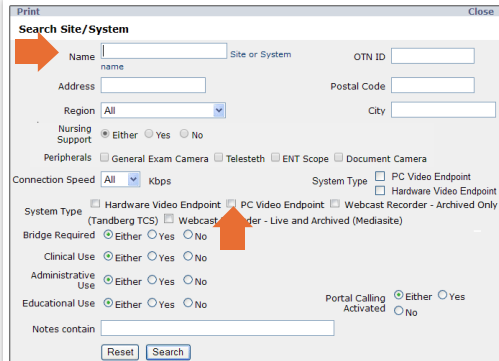


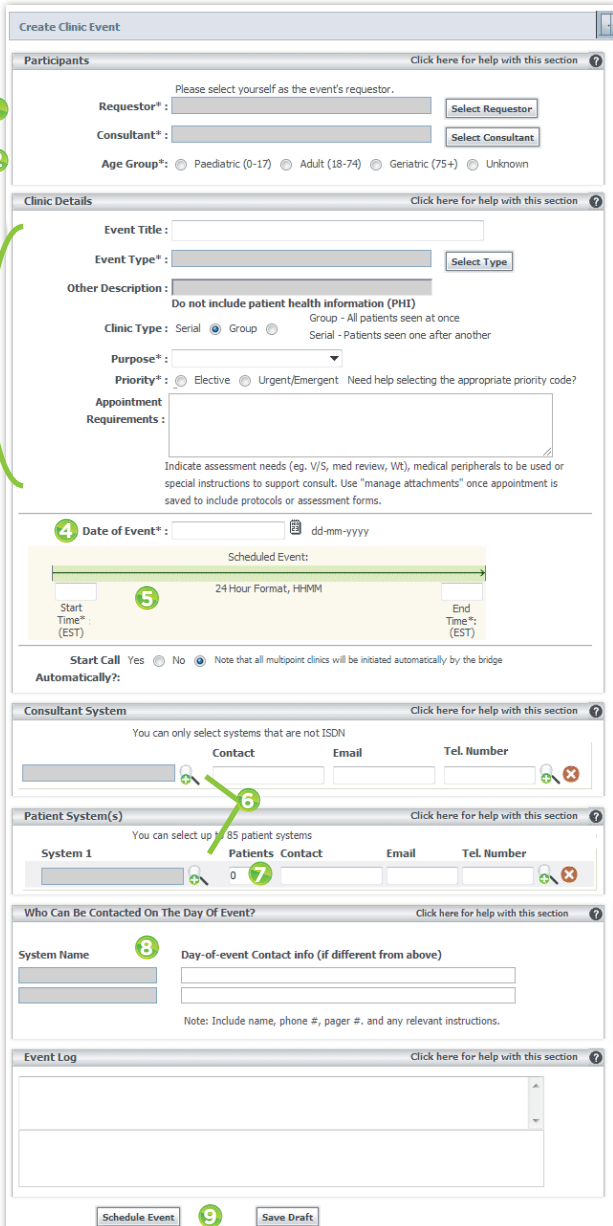


Figure 6: Search for eVisit (Videoconference) system

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Ncompass Clinics

1. You are the **Requestor**. The **Consultant** is the medical professional who will see the patient. Click each field's **Select...** and find their name in the Contact Registry.
2. Identify the **Age Group** of the patient(s).
3. Identify the **Clinic Details** including type, purpose, priority, and appointment details.
4. Enter a **Date of Event**, by clicking the calendar link  and selecting a date or type a date using the format dd-mm-yyyy.
5. Enter **Start** and **End Times**, by typing the desired times using 24-hour format EST (e.g., 1400 for 2:00 p.m.).
6. For each **System** click the 'add system' icon  and find the relevant entries in the Site/System Registry and identify each system's contact.
To search for an eVisit (Videoconference) system, in the **Site/System Search** panel:
 - i. In the **Name** field, type the person's first name or last name.
 - ii. Select **System Type** = PC Video Endpoint.
 - iii. Click **Search**.
 When you select a system from the search results list, Ncompass fills in the relevant field with the system name.
7. For each Patient System, in the associated **Patients** field, type the number of patients who will attend or be discussed.
8. If needed, provide one or more day-of-event contacts for each system participating in the event.
9. If there are no associated appointments, click **Schedule Event**. If there will be associated appointments, click **Save Draft** and then continue to "Associating Patient Appointments to an Ncompass Clinic" on the following page.




The screenshot shows the 'Create Clinic Event' form with the following sections and callouts:

- Participants** (Callout 1): Requestor* and Consultant* dropdowns with 'Select Requestor' and 'Select Consultant' buttons.
- Age Group*** (Callout 2): Radio buttons for Paediatric (0-17), Adult (18-74), Geriatric (75+), and Unknown.
- Clinic Details** (Callout 3): Event Title, Event Type* (with 'Select Type' button), Other Description, Clinic Type (Serial, Group, All patients seen at once, Patients seen one after another), Purpose*, Priority* (Elective, Urgent/Emergent), and Appointment Requirements.
- Date of Event*** (Callout 4): A date picker and a 24-hour format input field (HHMM) with a 'Scheduled Event' timeline.
- Start Time*** (Callout 5): Input field for the start time in 24-hour format.
- End Time*** (Callout 6): Input field for the end time in 24-hour format.
- Start Call Automatically?** (Callout 7): Radio buttons for Yes and No.
- Consultant System** (Callout 8): Search results table with columns for Contact, Email, and Tel. Number.
- Patient System(s)** (Callout 9): Search results table with columns for System 1, Patients, Contact, Email, and Tel. Number.
- Who Can Be Contacted On The Day Of Event?**: Section for providing day-of-event contact info for each system.
- Event Log**: Section for logging the event.

Figure 7: Create Ncompass clinic



Ncompass offers you an easy way to manage your clinics - editing, canceling, printing, notifying participants and even recurring your clinic (that is, you can use the 'recur' button to set up a series of daily/weekly/monthly Ncompass clinics). For full details, visit Ncompass > Resources > Documents (e.g., [Clinical Self-Scheduling](#) .

Associating Patient Appointments to an Ncompass Clinic

Adding patient appointments to your clinic is an easy and secure way to share information about which patients are participating in the clinic and track when they are scheduled to see the consultant.

Patient appointments are optional for Ncompass clinics.

1. To start creating an associated appointment, click **Create Associated Clinical Event >>**.
2. If it's a serial clinic type the **Start and End Times** using 24-hour format EST (e.g., 1400 for 2:00 p.m.).
3. Identify the **Patient** by selecting them from the Patient Registry or type the patient information in the associated fields.
4. Identify the **Appointment Type**, **Priority**, and **Who Will Contact the Patient**.
5. To complete and associate the appointment, click **Create Appointment**.

The screenshot shows the 'Associated Clinical Events' window. At the top, it says 'No clinical events are currently associated'. Below this is a button 'Create Associated Clinical Event >>'. A message 'Room for 3 more clinical events' is displayed. The 'Scheduled Event' section has a green bar representing the event duration, with 'Start Time*' and 'End Time*' fields. Below this are fields for 'Patient*', 'Gender' (Male, Female, Other), 'Address', 'Home Phone', 'Work Phone', 'Date of Birth' (with an example 'e.g.: 18-01-1973'), 'Age Group*' (Paediatric (0-17), Adult (18-74), Geriatric (75+), Unknown), 'OHIP Number', 'Appointment Type*' (Initial, Follow-Up), 'Priority*' (Elective, Urgent/Emergent), and 'Who Will Contact The Patient?*' (Patient Coordinator, Consultant Coordinator, Other (Specify)). There is a 'Select Patient' button and a 'Clear' button. At the bottom, there is an 'Event Log' section and 'Create Appointment' and 'Cancel' buttons.

Figure 8: Serial clinic associated appointment



You can create appointments for all, some, or none of your patients, but the total number of associated appointments must be less than or equal to the number you entered in the clinic frame's **Patients** field.

For reporting purposes, Ncompass uses the number of patients indicated within the clinic frame rather than counting the individual patient appointments (because patient appointments are optional).

This screenshot is identical to Figure 8, showing the 'Associated Clinical Events' window for a serial clinic appointment. It includes the same fields for patient information, appointment details, and contact information.

Figure 9: Group clinic associated appointment