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

Phone: 1-855-654-0888 **Email:** techsupport@otn.ca

1 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.

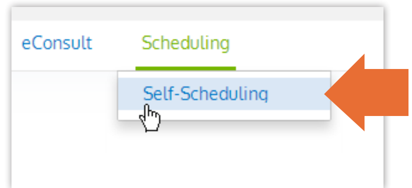

Figure 1: Self-scheduling link

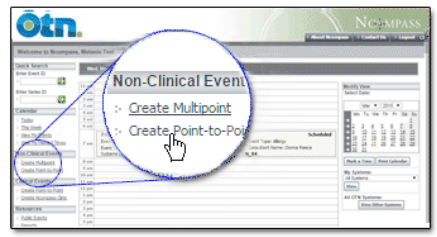

Figure 2: Ncompass home page, Non-Clinical Events links

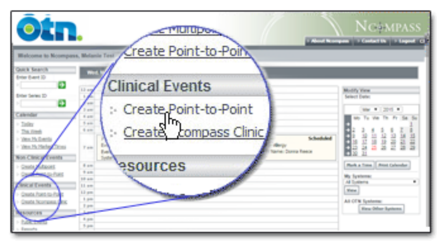

Figure 3: Ncompass home page, Clinical Events links

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.

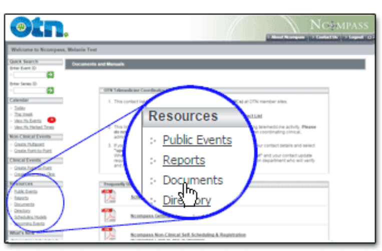

Figure 4: Ncompass documents

2 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, **l**eave 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].

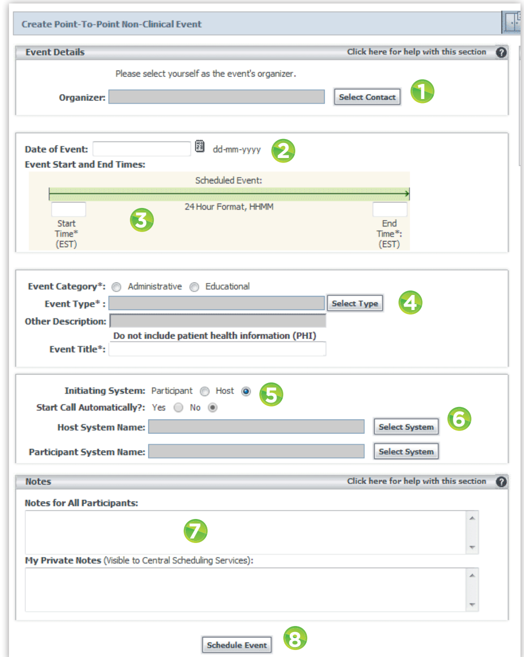

Figure 5: Create P2P non-clinical event

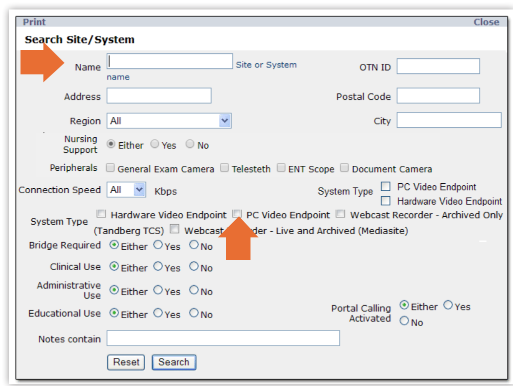

Figure 6: Search for eVisit (Videoconference) system

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).

3 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.

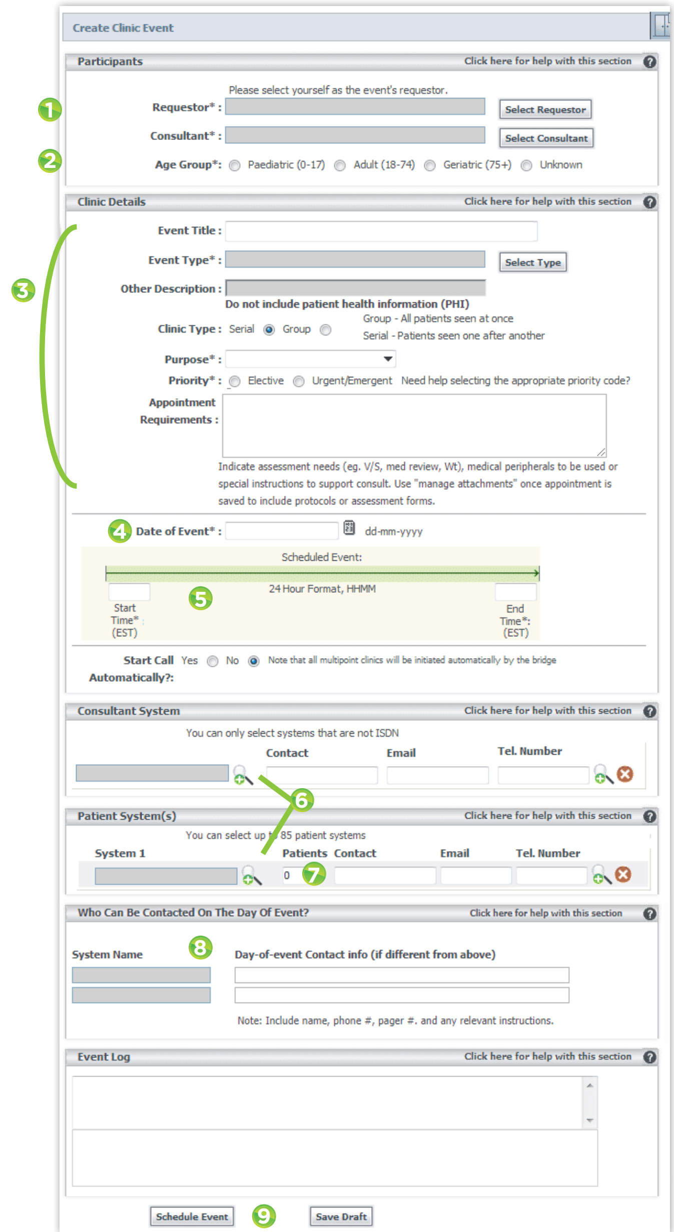

Figure 7: Create Ncompass clinic

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**.

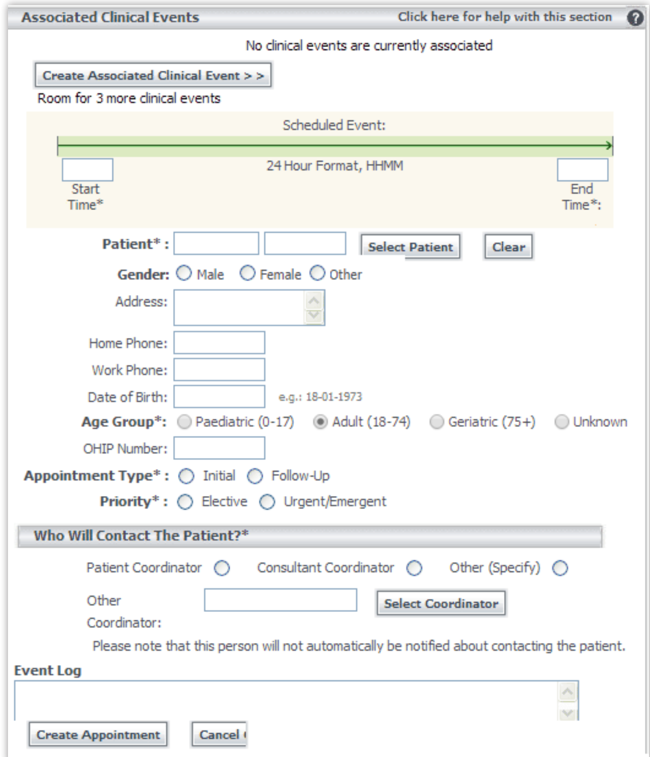

Figure 8: Serial clinic associated appointment

> 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).

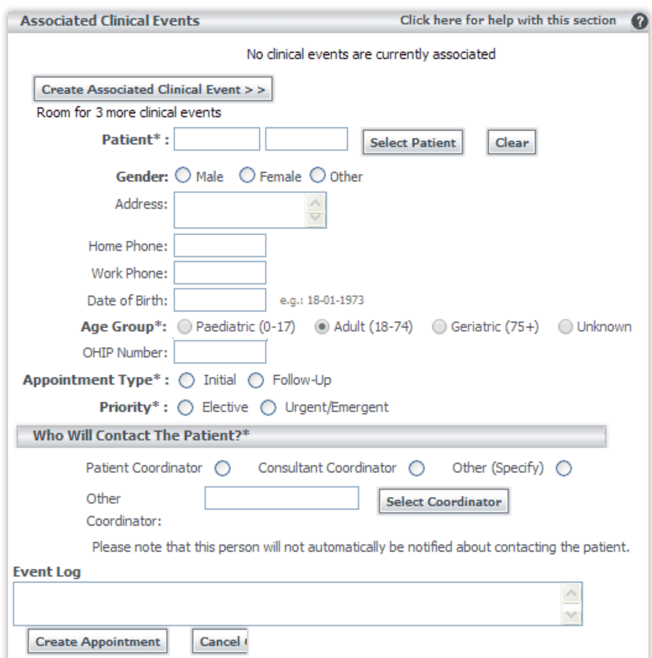

Figure 9: Group clinic associated appointment