Create clinic schedules in ImmsBC

This guide explains how to create the facility clinic schedules which enable citizens to book appointments for Covid/flu immunizations online using getvaccinated.gov.bc.ca.

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Create clinic schedule

Only users with the **Regional Admin** role (using Classic ImmsBC) **HA Lead/Pharmacy Lead** role (in Community Portal) can create/update clinic schedules. Users with the **Clerk/Clinician** role can view schedules but can't create or change them.

Set initial clinic schedule

Before starting

✓ Have the facility you want to manage open **TIP** Find facilities you've recently used on the "Recently Viewed Facilities" section of the home page.

1. Navigate to the *Details* tab on the facility profile.

2. Review facility details. To update fields[1], click the ***pencil*** icon, update the information and click ***Save***.

[1] See Definitions and Standards section for more information on the applicable fields.

3. To set defaults for
   a. an Immunization schedule: click the ***pencil*** by the *Default Vaccines* field. Edit mode will open. Click the **vaccine(s)** you want. Use the **arrow** button to move it/them to the *Chosen* box. Click ***Save***.
   b. a Minor Ailments and Contraception schedule: click the ***pencil*** by the *Minor Ailments and Contraception* field. Edit mode will open. Click the **service** you want. Use the **arrow** button to move it to the *Chosen* box. Click ***Save***.
4. Navigate to the ***Appointment Scheduler*** tab.
5. Select your ***Appointment Type***.
   a. For Immunization schedules, select ***BC Immunization Program***.
   b. For Minor Ailments and Contraception Services, select ***Minor Ailments and Contraception***.
6. The schedule for the current week will display. Use the **arrows** by the date fields to move to the week you want to create a schedule for.
7. Select the **day of the week.** Enter all required data.[1] Repeat for each day in the week you want appointments available.
8. Click ***Save***. Click ***Confirm***. ImmsBC will calculate the total appointment capacity (aka total number of appointment slots available) for the days you entered.

Manage custom block

A custom block allows you to change the schedule on a specific day. For example, you can use a custom block to remove appointment capacity during lunch breaks on Fridays.

Before starting

- ✓ Have the facility you want to manage open
- ✓ Be in the *Appointment Scheduler* tab with the schedule you want to amend open (this step usually happens right after creating a schedule as outlined above*)*

1. Find the block you want to customize (the custom block row should read “yes”). Click ***Yes***. **TIP** If you initially selected ***No*** in the custom block field you can change it to ***Yes***, but you can’t change *Yes* to *No*.
2. A pop-up modal will open. Scroll down to the appointment blocks you want to change. You can change the *Status* (e.g. if the clinic will close from 12-1, you can change the status of those blocks to *Inactive)* or the *Capacity* (e.g. if you will only have one immunizer from 12-1pm, you can decrease the capacity per block to 1).
3. Click ***Save***. A success banner will appear. Click ***Cancel*** to close the modal.

Change vaccines offered by day

The vaccines in the facilities' default vaccines section will apply to future appointments, but you can change vaccines offered on specific days to block certain vaccine types after their expiration, plan for new vaccine arrivals and seasonal adjustments, or offer childhood immunizations on certain days.

Before starting

- ✓ Have the facility you want to manage open
- ✓ Be in the *Appointment Scheduler* tab with the schedule you want to amend open (*typically this step would happen immediately after creating a schedule as outlined above)*

1. To change the vaccines offered on a day, click the **number** in the *Vaccines Offered* column. A pop-up modal will open.
2. To add vaccines to the appointment slot, move them from *Available* to *Chosen*. To remove them, move them vaccines from *Chosen* to *Available*. **NOTE** You can apply vaccine changes to multiple days buy adjusting the *Start* and *End* dates.
3. Click ***Save***. Click ***Confirm***. A success banner will appear. The pop-up modal will close.

Mass Clone appointments

Clinic schedules are often similar from week to week. To avoid entering the same schedule repeatedly, use the *Mass Clone* feature to copy schedules, including attributes, custom blocks and vaccines offered.

Before starting

- ✓ Have the facility you want to manage open
- ✓ Have the schedule you want to clone completed and saved according to sections 2-4 above.
- ✓ Be in the *Related* tab
- ✓ Confirm the appointments you want to clone have the correct vaccines applied

1. In the *Appointment Day Management* section, find the appointment date you want to clone. **TIP** To resort the appointments, click ***View All,*** then click the **appointment date column** to sort by date.
2. Click the ***Name*** field. The format should be similar to *BC Immunization Program 2026-9-5.*
3. A new screen will display the appointment's *Details* tab. Click the ***Mass Clone*** tab.
4. Select the ***Start*** and ***End Date*** and **days of the week** you want the appointments to be cloned for.
5. Click ***Clone***. A success banner will appear once it has saved. If you are mass cloning many days, it may take a few moments to save.

Review inventory snapshot

Appointments in ImmsBC are independent of inventory. This means that you could have 25 appointments available but only 20 doses on hand. The *Inventory Snapshot* tab helps you compare doses on hand with available/booked appointments, For field definitions see Field Definitions and Standards section below. If you navigate to this page and have unconfirmed inventory transfers, you'll see this warning message: *There are currently unconfirmed (inventory) transfers, please go to Supply Location to confirm transfer.*

NOTE If there is no data for a specific vaccine, the row will not show.

Field definitions and standards

FIELD	DEFINITION / STANDARD
Clinic Profile – Details Tab	
Account Name	The facility name that will display to clients when they're booking an appointment. The naming convention is Age – Location Clinic name e.g. Age 12 and above – Creston Health Center.
Default Vaccines	Vaccines selected here will automatically be applied to appointments in the future. These can be changed on a day-by-day basis as necessary
Minor Ailments and Contraception	**Only used by pharmacy.** Items selected here will display for citizens trying to book an appointment with a pharmacist for a minor ailment of contraception service.
Minimum Age	Mandatory for clinic creation. Clients younger than the age indicated in this field will not be able to book appointments at the clinic. For 6 months+ enter 0.
Maximum Age	Mandatory for clinic creation. Clients older than the age indicated in this field will not be able to book appointments at this clinic. For no upper limit enter 999.
Service Delivery Location (SDL)	This code comes from PIR and links the clinic in ImmsBC with the location in PIR.
Active	A *Yes* next to *Active* means the clinic is operational. *To have facilities show for clients to book the clinic the clinic needs to be marked as *Active* AND the *Don't show on citizen portal* checkbox (see below) must be *unchecked.*
Type	Set during clinic creation. Identifies the type of facility (e.g. Clinic, Pharmacy, Long-term care etc.)
LTC/AL Type	Indicates if an LTC/AL is a public health facility, a private facility or a public/private partnership.
Services	Services listed in this field (e.g. *Near Public Transit, Wheelchair Accessible* etc.) will display for clients when booking appointments.
Don't Show on Citizen Portal	Check this when appointment schedules being created but the clinic isn't active, you don't want citizens booking them now, or it's a clinic such as a school or long-term care facility that does not allow citizens to ever book appointments.
Clinic Profile – Scheduler Tab	
Start Time	The time you want appointments to start on a specific day.
End Time	The time you want appointments to end by on a specific day

FIELD	DEFINITION / STANDARD
Duration per block (minutes)	The appointment length (e.g., for 15-minute appointment slots select 15)
Capacity per block	The number of appointments available during each appointment e.g., if you have two immunizers that can immunize at the same time enter 2 so two appointments can be booked at the same time.
Total Capacity	Auto calculated. The total number of appointments available given the start and end time, the appointment duration and capacity.
Booking Counter	Auto calculated. The number of appointments currently booked from that appointment block.
Custom Block	Indicates exceptions to the schedule (e.g. breaks). *Yes* allows you to create custom appointment blocks. *No* mean the appointment blocks set up cannot be customized.
Vaccines Offered	Populates when the schedule has been saved. The number indicates how many vaccines are offered during this appointment block. Default to the *Default Vaccines* on the clinic profile. To customize, follow the steps outlined in the "change vaccines offered by day" field. **NOTE** Changing vaccines in this list will NOT impact existing appointments.
Status	Indicates the current state of the appointment blocks • *Planning* use when creating blocks that you do not want accessible to the public yet • *Active* for appointments available for citizens to book into • *Completed* the capacity for the appointment day is full/complete. The system will not set this status automatically when all appointments are booked. • *Cancelled* the appointments have been cancelled or deleted. The system will not set this status automatically however when appointments are deleted. • *Inactive* used to disable appointments days, making them unavailable for citizen booking **NOTE** Completed and cancelled statuses are used more for reporting purposes. Any status other than active renders the associated time slots unavailable for citizen booking.
On the Clinic Profile – Inventory Snapshot	
Vaccines Offered	Displays all vaccines listed as *Vaccine Defaults* on the related tab.
Remaining Doses	The current total count of doses for vaccine trades on hand for consumption/administration.
Booked Appointments by Vaccine	Total number of appointments currently booked, broken down by vaccine.
Projected Surplus/Shortfall	The difference between the remaining doses and currently booked appointments. • **Surplus:** green. Indicates how many doses are remaining given doses on hand and booked appointments. • **Shortfall: r**ed. Indicates how many doses are short given doses on hand and booked appointments
Unbooked Appointments by Vaccine	Number of appointments remaining on the citizen portal for booking by agent.

Tips and troubleshooting

Assign features or ages to specific blocks Currently ImmsBC does not allow you to assign specific features or age ranges to specific blocks. The feature only works for vaccine products.

Default Vaccine The *Default Vaccine* section on the clinic profile allows clinics to specify the vaccines they want to be automatically applied to future appointment blocks. This helps ensure consistency in the vaccine options available for scheduling, without impacting existing appointments. Clinics that prefer to offer the same vaccine options for every appointment can continue to do so. Clinics that want variability in their vaccine offerings will manage it using the steps outlined in "Change vaccines offered by day" section of this document.

FAQ

How do we create a new facility? Regional (Health Authority/Pharmacy) support teams submit requests to Provincial Tier 1 Support to create new clinics. This ensures they are set up correctly.

If we're no longer using a facility, how do we deactivate it? Regional support teams submit a request to Provincial Tier 1 Support to inactivate the clinic.

How do I remove appointments in the future that aren't booked if I no longer want to offer those appointment times? Navigate to the ***Scheduler*** tab. Select the ***Appointment Type*** from the drop down. Using the week arrows, locate the date you want to modify. On the *Custom Block* column, click ***Yes***. Go in and find the appointments you wish to inactivate. On the *Status* column select ***Inactive***. Click ***Save***.

Revision history

DATE	AUTHOR(S)	CHANGES/COMMENTS
Aug 22, 2024	B. Coles J. Burman	Combined previous outdated guides (HA_How to Manage Appointment Blocks in a Clinic using the ImmsBC Schedule, HA_How to Mass Clone Appointment Blocks in ImmsBC) and incorporated fall 2024 changes including inventory snapshot and default vaccines
July 2026	B. Coles C. Smith D. Bartoszewski	Updated with new roles, added FAQ section.