Book an Appointment

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A. Schedule or reschedule an appointment

Before starting

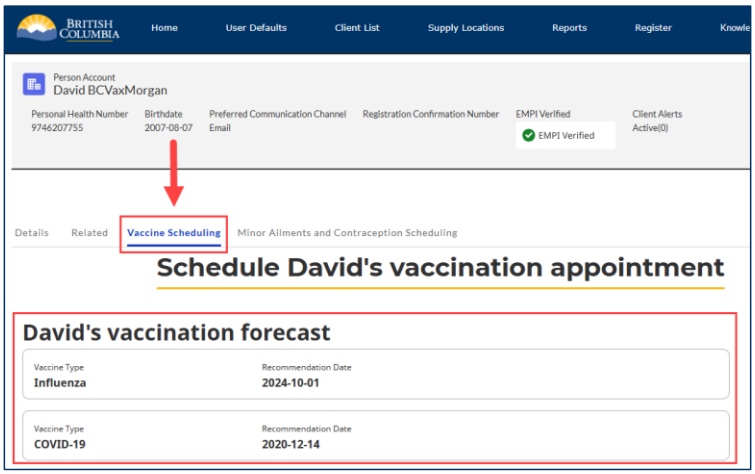
✓ Have the client record open

Commented [DB1]: Update this screenshot

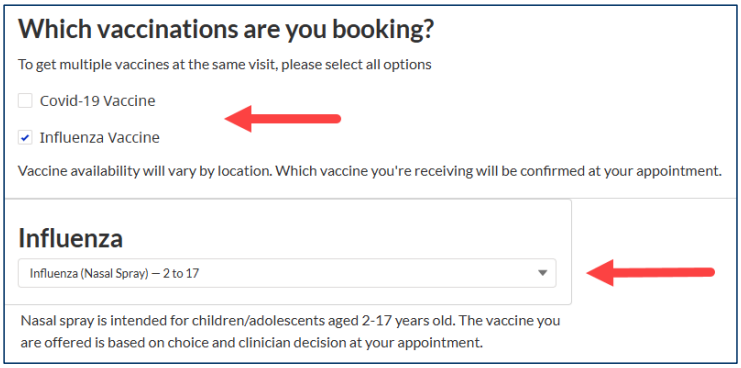
1. Navigate to the *Person Account*. Click the ***Vaccine Scheduling*** tab.

2. Select the **vaccination(s)** you want to book.

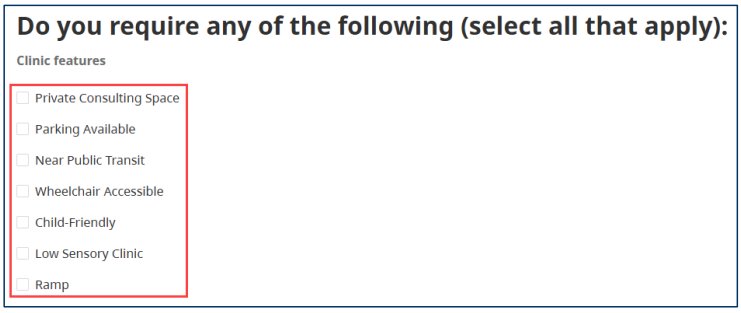
TIP See the *FAQ* section for how to book an appointment when the intended vaccine is **not** forecast.



3. A field will appear for each vaccine selected. Select the **agent** from the drop-down menu.



4. Select any ***Clinic features*** the client needs.



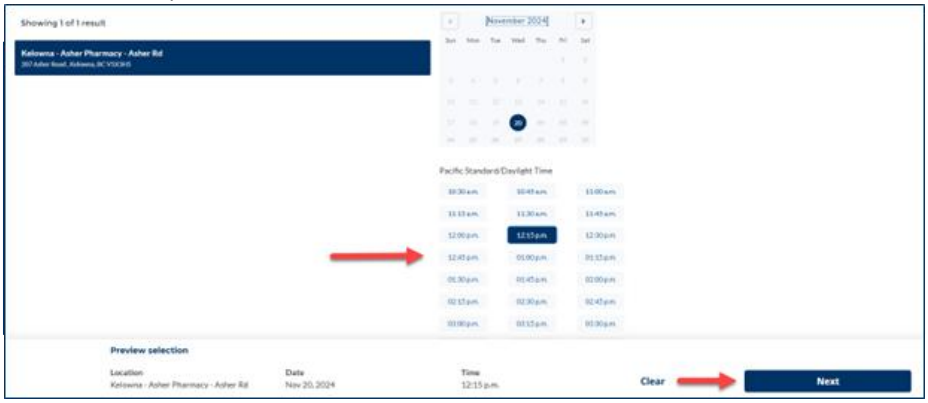
5. Search for the clinic using one of these methods:



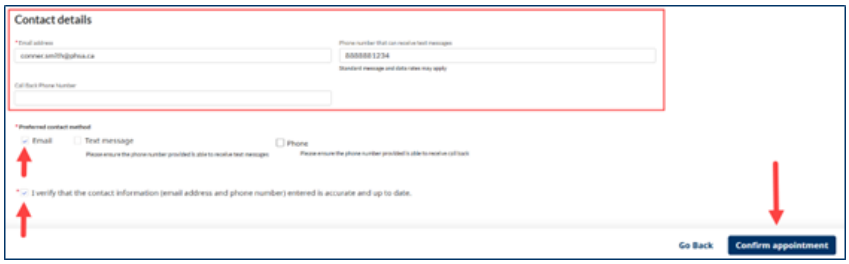
- *Search by postal code*: enter the postal code and search radius; or
- *Search by city*: enter a name of a city or town and click *Search*; or
- *Search by clinic name*: enter the clinic name and click *Search*.

Clinic locations matching the criteria will display.

6. Select a **clinic**. Days with available appointments will be circled in blue. Select a **date** on the calendar. Available appointment times will display below (you may need to scroll). Select a **date** and **time**. Check your selection. Click ***Next.***

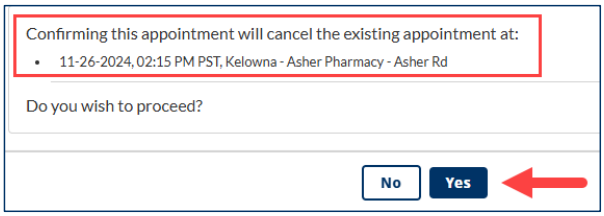


7. Review the information. Scroll down. Confirm the contact details. Click the client's ***Preferred contact method***. Click the **checkbox** verifying the contact information is accurate. Click ***Confirm appointment***.



8. The appointment will display. The client will be contacted via their *Preferred contact method*. To book another appointment for the same client, select ***Book another appointment***.

NOTE When rescheduling, the popup shown on the right will ask you to confirm the cancellation of the previous appointment. Click ***Yes*** to reschedule.

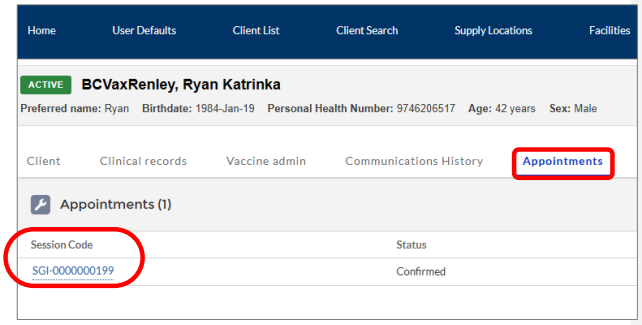


B. Cancel an appointment

Before starting

✓ Have the client record open

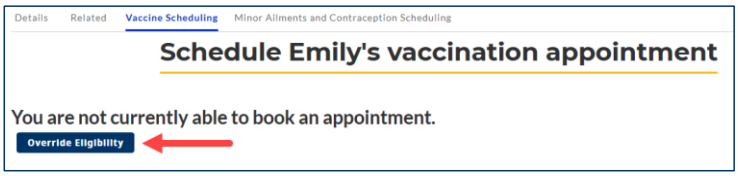
1. Click the ***Appointments*** tab. Click the ***Session Code*** link. The appointment record will open.
2. Click the pencil icon by the *Status* field. The record will.
3. Change the *Status* to ***Cancelled***. Click ***Save***.



FAQ

Why can't I select Influenza? Influenza is only an option during the Influenza campaign season, usually from mid-September to the end of June.

Can I book an appointment if the client is not eligible? Yes, if you're a Call Center Agent, Clerk, Clinician, HA/Pharmacy lead or Regional Admin, you'll have an ***Override Eligibility*** button on the *Vaccine Scheduling* tab. Click it, provide a reason for the override, then proceed with the booking workflow.



How many appointments can a client book? Clients can have one COVID-19 appointment and/or one influenza appointment (two appointments total) OR they can have one appointment for both COVID-19 and influenza.

How do I reschedule an appointment? Schedule a new appointment with the same *Reason* (COVID-19 or Influenza) as the previous one. On the *Confirmation* page, confirm that the new appointment cancels the existing appointment.

For example, if you reschedule a COVID-19 appointment, when you confirm the new COVID-19 appointment, the system will cancel the existing COVID-19 appointment. But if a client has an

influenza appointment and books a COVID-19 appointment, the system will not cancel the Influenza appointment.

Why was my appointment cancelled? To vaccinate as many people as possible, we cancel appointments that are no longer required. If a client has an appointment next month and you rebook for next week, the system will cancel the appointment for next month so another client can book it.

Revision history

DATE	#	AUTHOR(S)	CHANGES/COMMENTS
December 2023	1.0	M. Canning, B. Coles	Created.
October 2024	2.0	M. Canning, H. Xing J. Burman, C. Smith	Updated formatting, screenshots, Override Eligibility functionality, and user direction.
July 2026	3.0	B. Coles, C. Smith, D. Bartoszewski	Updated to align with ImmsBC 2.0 initial release.