

Managing capacity changes with schedule overrides

Warning:

If you decrease the number of available appointments, the existing bookings are not cancelled and there is no automated communication. Consider how you will manage the existing bookings and contact consumers to reschedule or cancel their bookings.

Purpose

To ensure that Book my Vaccine information reflects the availability of appointments for your site

When used

Make changes to schedule, such as for vaccinator availability or a planned or unexpected closure

Person responsible

Site Administrator

Before you begin

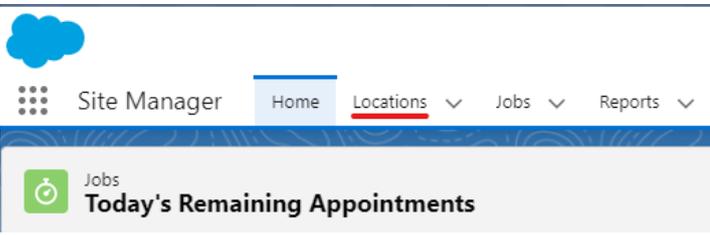
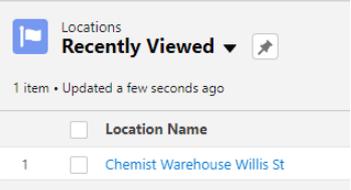
Determine the changes required. For example, special opening hours or known capacity changes (such as, vaccinator on holiday).

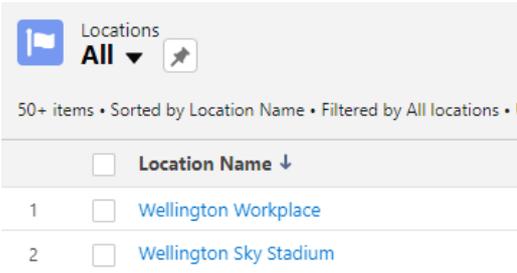
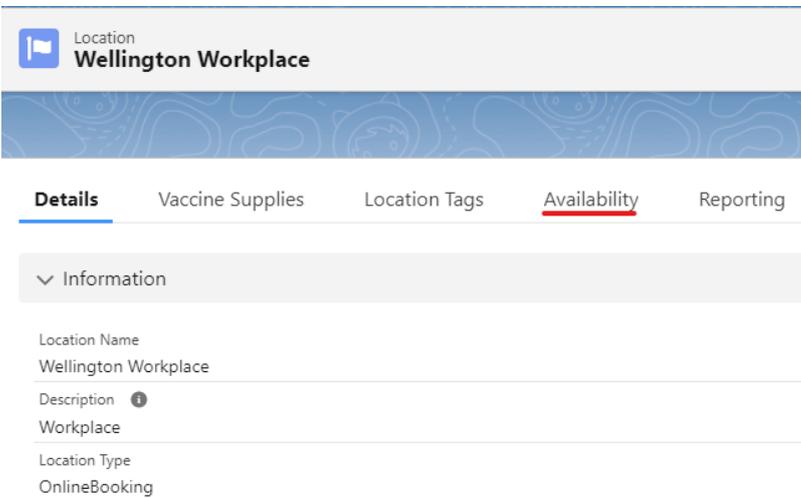
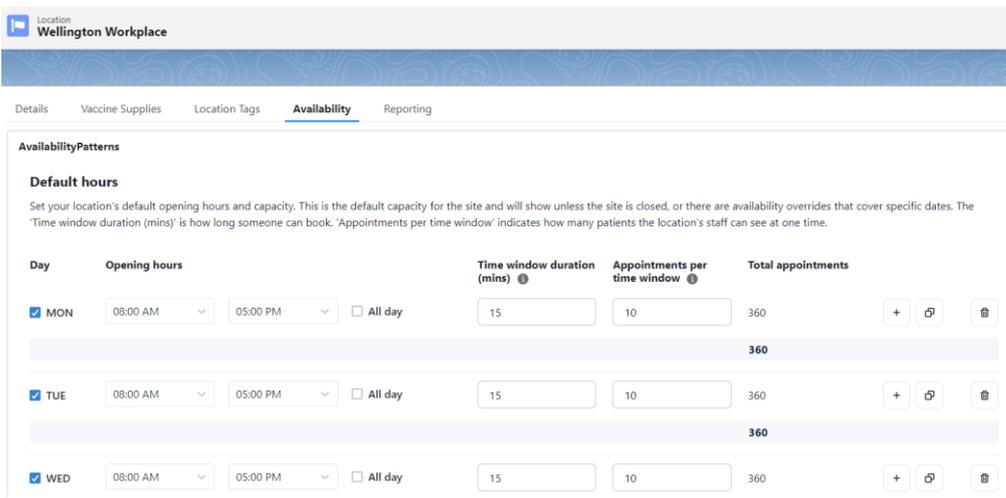
For help: Email help@imms.min.health.nz or call 0800 223 987.

Procedure

Note: Screenshots have been taken from a test version of Book my Vaccine. The colours in your version may be different.

To manage your site's capacity:

Step	Action
1	Logon as the Site Manager in Salesforce. Note: Use this link: nibs.my.salesforce.com
2	Select the Locations tab.  <p>The location page is displayed with Recently Viewed.</p> 

Step	Action
3	<p>Click the arrow and select All from the dropdown list.</p>  <p>All the locations you have access to are displayed.</p>
4	<p>Click the relevant location name. The location details are displayed.</p> 
5	<p>Select the Availability tab. The Availability Patterns are displayed.</p>  <p>Note: Monday through Sunday are displayed.</p>
6	<p>Scroll to bottom of the screen.</p> 

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7	<p>Click New availability override.</p> <p>The select date range screen is displayed.</p> <p>Availability overrides Override your default hours and capacity for a period of time. A maximum of 20 overrides can be active at once.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="text-align: right;">Actions ▾</p> <p>Select the date range you want to override</p> <p>From Up to and including</p> <p> <input type="text" value="Select date"/> <input type="text" value="Select date"/> <input type="checkbox"/> No end date, run ongoing </p> </div> <p>For more detailed instructions for working with appointment schedules, refer to the Managing capacity with appointment schedules procedure.</p>																																																												
8	<p>Select the date range.</p> <p>Note: If the override will continue for the foreseeable future, tick the No end date, run ongoing box.</p> <p>Availability overrides Override your default hours and capacity for a period of time. A maximum of 20 overrides can be active at once.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="text-align: right;">Actions ▾</p> <p>Select the date range you want to override</p> <p>From Up to and including</p> <p> <input type="text" value="Select date"/> <input type="text" value="Select date"/> <input type="checkbox"/> No end date, run ongoing </p> </div>																																																												
9	<p>In this example, the site will be closed on Wednesday and Thursday but will be open on Saturday, when it is normally closed. These changes only affect the week of 17 – 23 April.</p> <p>From <input type="text" value="04/17/2023"/> Up to and including <input type="text" value="04/23/2023"/> <input type="checkbox"/> No end date, run ongoing</p> <p>Weekly pattern</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Day</th> <th>Opening hours</th> <th></th> <th>Time window duration (mins)</th> <th>Appointments per time window</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> MON</td> <td>09:00 AM - 05:00 PM <input type="checkbox"/> All day</td> <td></td> <td>20</td> <td>40</td> <td>960</td> </tr> <tr> <td colspan="5"></td> <td style="text-align: right;">960</td> </tr> <tr> <td><input checked="" type="checkbox"/> TUE</td> <td>09:00 AM - 05:00 PM <input type="checkbox"/> All day</td> <td></td> <td>20</td> <td>40</td> <td>960</td> </tr> <tr> <td colspan="5"></td> <td style="text-align: right;">960</td> </tr> <tr> <td><input type="checkbox"/> WED</td> <td colspan="5">Unavailable</td> </tr> <tr> <td><input type="checkbox"/> THU</td> <td colspan="5">Unavailable</td> </tr> <tr> <td><input checked="" type="checkbox"/> FRI</td> <td>09:00 AM - 05:00 PM <input type="checkbox"/> All day</td> <td></td> <td>20</td> <td>40</td> <td>960</td> </tr> <tr> <td colspan="5"></td> <td style="text-align: right;">960</td> </tr> <tr> <td><input checked="" type="checkbox"/> SAT</td> <td>10:00 AM - 04:00 PM <input type="checkbox"/> All day</td> <td></td> <td>20</td> <td>20</td> <td>360</td> </tr> </tbody> </table>	Day	Opening hours		Time window duration (mins)	Appointments per time window	Total	<input checked="" type="checkbox"/> MON	09:00 AM - 05:00 PM <input type="checkbox"/> All day		20	40	960						960	<input checked="" type="checkbox"/> TUE	09:00 AM - 05:00 PM <input type="checkbox"/> All day		20	40	960						960	<input type="checkbox"/> WED	Unavailable					<input type="checkbox"/> THU	Unavailable					<input checked="" type="checkbox"/> FRI	09:00 AM - 05:00 PM <input type="checkbox"/> All day		20	40	960						960	<input checked="" type="checkbox"/> SAT	10:00 AM - 04:00 PM <input type="checkbox"/> All day		20	20	360
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10	Check the total appointments for each day to ensure you have not exceeded your site's capacity.																																																												
11	<p>To implement the changes, click Save.</p> <p>The override dates are displayed.</p> <p>Note: You can set up to 10 overrides.</p>																																																												

Next steps

This procedure is complete.