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1 Introduction

Department of Veterans Affairs (VA) Veterans Health Information Systems and Technology Architecture (VistA) Scheduling (VS) Graphical User Interface (GUI) module is the Windows GUI version of the Patient Information Management System (PIMS) Scheduling module. It provides appointment management functions included in PIMS Scheduling, but with the added convenience and usability of a GUI.

1.1 Purpose

The Veterans Health Administration (VHA) Office of Veterans Access to Care (OVAC) requested an enterprise enhancement for the VS package. The enhancement reduces operating costs for VHA and improves operational efficiencies, resulting in patient-centered access to care, coordinated care, increased customer satisfaction, and the reduction of excessive cycle/wait time for scheduling patients.

1.2 Overview

VS GUI is a software module that allows schedulers to make appointments quickly by viewing multiple appointment request types and multiple clinics in one screen. A scheduler can easily view patient requests for service, find the next available open appointment, view the provider’s availability in multiple clinics, and track a patient’s appointment process. Refer to Section 2 for a more detailed description of VS GUI functionality.

1.3 Project References

1.3.1 Information

The VS GUI points of contact (POCs) include:

- OVAC VSE Project Manager – Ms. Erin Vanderwall, Erin.Vanderwall@va.gov
- OVAC Program Office – VHAVSEProgramOffice@va.gov
- OIT VSE Project Manager – Mr. Shannon Ayers, Shannon.Ayers@va.gov

Note: The VSE project SharePoint site can be accessed via the following link: http://vaww.oed.portal.va.gov/pm/iehr/vista_evolution/enhancements/SitePages/Home.aspx

VSE Pulse pages:

- Scheduler: https://www.vapulse.net/community/vista-scheduling-enhancements-vse
- Super User: https://www.vapulse.net/groups/vse-super-users
- National Return to Clinic Order Implementation: https://www.vapulse.net/groups/return-to-clinic-rtc
- Frequently Asked Questions/Known Issues document: https://www.vapulse.net/docs/DOC-107042
1.3.2 Coordination

Coordination between the project and its specific support functions (e.g., installation coordination, security, etc.) for VS GUI is the same as those for VistA.

1.3.3 Help Desk

Refer to Section 11 for additional information.
1.3.4 Organization of the User Guide

This user guide is comprised of 11 sections, as follows:

- **Introduction**: Addresses general project information
- **System Summary**: Contains system configuration, data flows, and user access level information
- **Getting Started**: Contains procedures for logging on and off of the system, instructions on how to print and export schedules, and information on VS GUI tab displays, basic functions for searching, sorting, filtering, and viewing
- **Ribbon Bar**: Contains procedures for using the Schedule Manager Ribbon Bar and details on features, such as patient demographics, new request actions, pending appointments, print, export, refresh, query tool, user preferences, and patient preferences
- **Request Management**: Outlines features and procedures for using the Request Management Grid (where patient’s pending requests are displayed 25 at a time) and the Pending Appointments window (where booked appointments are displayed in the Ribbon Bar of the Tasks tab)
- **Appointment Management**: Provides details describing how to manage an appointment – after selecting a patient, the option appears to schedule a new appointment (APPT) or Patient-Centered Scheduling (PtCSch); a list of recent and upcoming appointments is displayed in the Ribbon Bar
- **Clinics**: Provides an overview of clinic and administrator views and actions
- **Reports**: Provides an overview of viewing and printing reports, and procedures for generating audit and clinic reports; a list of warnings is also included
- **Trash Queue Cleanup**: Defines this task and provides instructions for use
- **VistA Scheduling 508 Compliance**: Outlines processes for executing VistA Scheduling application functionality from the keyboard
- **Troubleshooting**: Provides contact information for the Help Desk regarding any problems with the VS GUI module
2 System Summary

The VSE project delivers a series of enhancements to legacy VistA Scheduling Version 5.3 via the VS GUI application.

The previously nationally released version 1.4 includes VS GUI 2.0.0.14 and VistA M patch SD*5.3*672. Install compliance date was Feb 8, 2018. This update included the following:

- Provides the capability for VSE users to authenticate via Personal Identity Verification (PIV)
- Clinic Group will display for second patient without searching for a different clinic group first. (Users should put cursors in the clinic group field and click Enter to refresh.) Ticket I10959194FY17
- Electronic Wait List (EWL) can now be consistently dispositioned from the Resource Management (RM) Grid. Ticket I11259063FY17
- Scheduling grid no longer allows overbooks in the evenings after a FULL DAY availability cancellation. The visual display does not extend the cancellation hash marks to midnight, but it will not allow the user to book, and presents an appropriate error message to user. Ticket I12362398FY17
- Drag and drop rescheduling within the current calendar view (including clinic groups and provider search calendar views) is now available for most existing appointments. Consult linked appointments and appointments in the past cannot drag and drop as they have other linkages that still require manual cancellation. Ticket I12487403FY17
- Slot tallies no longer move as the calendar view is scrolled down. Ticket I12529073FY17
- Schedulers cannot add new request or appointments in VS GUI after a patient is listed as deceased in VistA. Ticket I12602010FY17
- Cancel by Clinic no longer allows PID to be changed by switching between Cancel by Clinic and Cancel by Patient. Ticket I12748395FY17
- VS GUI Audit Report now reports accurate counts of actions within VS GUI for both individual and all schedulers. Tickets I12871937FY17
- Checking out appointment “Follow-up Needed” now works better than it did in former versions, however we continue to keep it tied to the SD SUPERVISOR key until we can completely separate the administrative check out function in VS GUI from any ties to the encounter files. We do not recommend use of check out at this time. Ticket I13233499FY17
- Appointments scheduled in VS GUI with a past date will now show in CPRS cover sheet and visit location lists. Ticket I13212697FY17
- SDRR CLINIC LETTER REPORT will now run properly (was hanging on bad data in previous versions). Ticket R14380532FY17

The next nationally released version 1.5 includes VS GUI 2.0.0.15 and VistA M patches SD*5.3*679 and GMRC*3.0*98. Install period is projected for May 31 2018 at time of publishing. This update includes the following:

- Pending Appointment Box Improvements:
Columns in the Pending Appointment list are now sortable
Filters can now be placed on each column in the Pending Appointments list
The date range for the Pending Appointments list has changed from (-365 days to +365 days) to (-365 days to + 1000 days)
Right-clicks on the Pending Appointments list in the ribbon in VS GUI, a new menu option, Print Pending, is now available. This option will print a list of all of the current patient’s appointments that occur from the install date of SD*5.3*679 into the future. If the list is filtered or date range extended, the Print Pending results should reflect those filters.

- Patient Selection, when a patient is selected, the system no longer immediately jumps to the New Request pop up box to prompt the user for a request type. The user can click the New Request (New Request) button in the ribbon in order to start a new request, as they could previously. This forces the scheduler to view existing requests before making a new one.
- The View Mode selector in the Arrangement pane of the ribbon has been removed, as it was unused.
- The print buttons in the letter printing window previous read Print (Local) and Print (Server). Now they read Print (Windows Printer) and Print (VistA Print Device), respectively.
- In the Select Patient pane located in the ribbon, additional fields have been added to the patient information displayed. These include Primary Care Provider (PCP), Mental Health Provider (MHP), and phone number. This addresses Ticket R16775634FY18.
- The New Appointment dialog will now have the Comments field filled with the comments from the original appointment request, whether it is an Appointment (Appt.) Request, National Return to Clinic (RTC), Patient Centered Scheduling (PtCSch) Electronic Wait List (EWL), or Consult request.
- The New Appointment dialog will now check to make sure that the slot being booked into has not been made unavailable since the user started working on the appointment (such as a clinic that was temporarily opened on a holiday being re-closed). This addresses Ticket I15980703FY17.
- View only users and users without privileges in restricted clinics can now access both the View Appointment and Expand Entry options when right-clicking on an appointment. Neither of these options allows changing of any data. This addresses Ticket R16581333FY17.
- The system will now allow a user to cancel an appointment for a deceased patient. This addresses Ticket I12603678FY17.

2.1 User Access Levels
The VS GUI module uses three access levels:

Provider and Non-Scheduler (View Only) can view patient appointments, clinics, and provider’s availability in VS GUI via:
• View patient appointments, clinics, and provider’s availability
• Find Available Appointments slots in a clinic or group of clinics
• Appointment Schedule displayed by clinic, provider or clinic group
• Request Management Query Tool to produce a list of patients waiting for an appointment
• Expand Entry on existing appointments to view details of when the appointment was created, encounter information (if available), and other appointment audit fields
• VistA Account Requirements: VistA option CLINICAL SCHEDULING PROCEDURE CALLS [SDECRPC] and VistA key SDECZVIEW. Please note, SDECZVIEW blocks all other SDEC keys the user may hold

Scheduler can make appointments quickly by viewing multiple clinics in one screen. The user can easily find open appointments, view the provider’s availability in multiple clinics, and track a patient’s appointment process in VS GUI via:

• Find Appointments to specify the dates to view only available appointments in a clinic or list of clinics
• Resource Schedules to display clinic schedules
• Appointment Schedule to display appointment schedules for a clinic and be able to view a provider’s schedule for the day, week, or month
• Request Management Queue to display a list of patients waiting for an appointment or a consolidated list of a particular patient’s unfulfilled appointment needs
• Ribbon Bar for a view that shows individual patient information after a patient is selected (demographics, pending appointments, etc.), as well as system functions like print, export, query tool and user preferences.
• VistA Account Requirements: VistA option CLINICAL SCHEDULING PROCEDURE CALLS [SDECRPC] and VistA key SDECZMENU. Please note, SDECZVIEW blocks all other SDEC keys the user may hold.

Administrator can perform all VS GUI Scheduler functions with the Task tab, with the addition of two additional tabs:

• System Tab to add/delete privileged users from a prohibited clinic and setup clinic groups.
• Reports Tab to view and export reports for clinic profile and user action audit reports
• VistA Account Requirements: VistA option CLINICAL SCHEDULING PROCEDURE CALLS [SDECRPC] and VistA keys SDECZMENU and SDECZMGR. Please note, SDECZVIEW blocks all other SDEC keys the user may hold.
3 Getting Started

This section provides a general walkthrough of the system from initiation through exit. The logical arrangement of the information shall enable the user to understand the sequence and flow of the system.

3.1 Logging On

VistA User Access and Verify codes are required to log on to the VS GUI. The user must have VistA options and keys according to their role (listed above).

VA Identification Cards (PIV)-enabled log in is introduced in this version. It is now the primary method of log in, but the user must have an active VistA account to access VS GUI, regardless of the method used to log in.

Note: The main screen of the application informs users whether they are logged into the test or production environment. The environment to which the user is logged in will be displayed in the top right corner of the main screen page.
move to a different station/VistA instance, you may need to re-link to add your new VistA account to your PIV card.

If you have not already linked your account, you can do so by following this link http://go.va.gov/qugx. If you experience any issues or are unable to complete the linking(binding) process, please contact the Enterprise Service Desk at (855) 673-4357, Option 3, or by email to ESDOtherSupport@va.gov.

Note: After selecting IAM Provisioning Service Link VistA to User you can tell if you’re already linked or there is no link by looking at the Vista Instances.

If you are not able to log in with your PIV for any reason, you will be able to bypass the PIV logon on the log in pop up by inserting your Access code/Verify Code on the log in pop up box, but it is expected that a security mandate will require you to use two factor authentications in the future, so it is highly recommended that you link your account to avoid access problems in the future.

If you have used your PIV card in another capacity (logged into your computer, for instance) in the last few minutes, VS GUI may recognize that PIV activity, and automatically take you into the application without re-entering your PIV PIN.

Note: If the PIV authentication service itself is having problems authenticating, the user may get an error, even if they select the correct certificate. These are usually widespread outages affecting several applications. If the PIV service is going to be down for an extended time, the national PIV will remove PIV completely, and the user will see a message to use VistA login credentials. Either way, VistA credentials are the contingency and can be used whether or not PIV authentication is working.
3.3 New Return to Clinic Orders (RTC Orders)

A nationally developed Return To Clinic (RTC) order dialog is included in CPRS version 31A. This order will allow VistA to transfer the national RTC orders to VS GUI as RTC requests. This will make it easier to transfer a provider's RTC order information seamlessly into an appointment with minimal human error in data transfer. All facilities have received upgrades to both CPRS and VS GUI to allow this to happen, however implementation and use of the national RTC order may not be immediate, and in some sites, will take significant planning and coordination. Once clinical staff begin using the national RTC orders in CPRS, the resulting requests should be processed in VS GUI.

3.4 Logging Off

To log off when you are finished scheduling appointments, click the close button (X) in the upper right corner of the VS GUI.

3.5 VS GUI Tabs

The VS GUI provides the following tabs:

- **Tasks**: Allows the scheduler to search for patient requests, view clinic resources, and make appointments.
- **System**: Allows an administrator (with the SDECZMGR security key) to add/delete privileged users from a prohibited clinic and set up clinic groups.
- **Reports**: Allows for various reports to be generated by users holding the SDECZMGR security key.

3.5.1 Tasks Tab

The **Tasks** tab Ribbon Bar includes the following sections:

- **Select Patient**: Search for and view information about a selected patient
- **Actions**: Allows the scheduler to initiate new APPT or Patient-Centered Scheduling requests
- **Arrangement:** Time Scale (slot length) displayed. Note: in this version, View Mode does not change the view of the calendar. Use the Day, Week, Month and Timeline buttons above the calendar itself to change the display.

- **Pending Appointments:** Date, clinic, and status of any pending appointments, past appointments (365 days back), and future appointments (1000 days forward) for the selected patient.

- **Special Needs/Preferences:** Identified special needs and/or preferences for the selected patient missing the Patient Record Flags (PRFs).

- **Tools:** Options include print, export, refresh, and queries.

- **Settings:** Access to User Preferences.

The **Tasks** tab Resource area includes the following sections:

- Calendar to choose a desired appointment date and to search for and access Clinic Schedules, Provider Schedules, and Clinic Groups.

- **Schedules:** View single or multiple clinic schedules in one screen.

![Figure 6: Tasks Tab Display](image)

### 3.5.2 System Tab Action Areas

The System tab includes the following sections:

- **Resource Management:** Scheduling Management allows for management of privileged users within Prohibited and Clinic Groups as well as the creation and management of clinic groups.

- **Resource Schedules Availability** allows for search of clinic, provider or clinic group by name.

- **Selected Clinic** provides a quick view of the selected clinic’s Primary Provider, Overbook Limit, Inactive Date, and Reactive Date.
3.5.3 Reports Tab Action Areas

The Reports tab allows for viewing and exporting of Audit Activity and Clinics setup information. Please note: Audit Activity Report is now working. See details in 8.1

3.6 Searching

The search feature enables a scheduler to:

- View and search clinic profiles to view appointments resources by clinic, provider, or by clinic groups
- View and search patient requests by request type
- Sort the request queue by any column in ascending or descending order and filter.
- Sort results and save the search into various outputs, such as Microsoft Excel or Adobe PDF and print to a network printer.

3.6.1 Search for Patient

1. Log into VS GUI.

2. From the Tasks tab, in the Search text box, type the search criteria for the patient. Click Search, and then select the requested patient’s name. Click Search/Choose patient from the resulting list.
3. In the Search field, the following options are available for searching for a patient:

- Last name, First name (no space between comma and first name)
- Full SSN
- First initial of the last name + last four of the SSN (ex. T0170)
- Last four of SSN (0170)
- Last name only (three-character minimum)
- Spacebar + Search will bring the last patient used in VistA, CPRS and VS GUI into the search drop down.

Figure 9: Patient Search

3.7 Filtering
Filtering can be accomplished in several areas of the VS GUI. Items that can be filtered are:

- Lists
- Time Period
- Facility

The following sections describe basic filtering.

### 3.7.1 Filtering Lists

You can filter any column on the request grid to narrow the type of information that you want to view.

1. In the request grid or pending appointments box, click any column that shows a filter icon.
2. Select a filter option.
3. Please note: Return to Clinic (RTC) are a sub-type of APPT Requests, and will be included if you check APPT.

NOTE: Filters often carry forward to other patients or activities. They do not automatically clear as the user moves from patient to patient, since many times the filter function is being used to work a list of open items and those filters should stay in place.

![Figure 10: Filtering Lists](image-url)
3.7.2 Paging Through Records

Filtered results are retrieved from the database and displayed in 25 row increments. To view additional records, use the arrow key located below the list to page through the records.

Figure 11: Paging Through Records
3.7.3 Filtering by Facility or Clinic

1. To filter by facility or clinic, in the Clinic Schedules pane, type in the name of the desired clinic (six-character minimum when searching by clinic name; four-character minimum when searching by clinic abbreviation),

2. Click the name of the clinic from the list to view the desired clinic.

![Figure 12: Filtering by Facility/Clinic](image)

3.7.4 Filtering by Time Period

1. To filter by time period, in the Resources pane, search for and select a desired clinic.

2. From the calendar, select a month and day for viewing appointments. Click the back and forward buttons to go to the previous or the next month.

![Figure 13: Filtering by Time Period](image)

3.8 Sorting
You can sort the consolidated list of requests in the request grid in different ways to isolate the information that you need to see.

### 3.8.1 Sorting by Column

You can sort the consolidated list of requests in ascending or descending order. The default sort is by Priority Group, Service Connected priority, Preferred Appointment date, and Date entered (Request date).

**To sort by column:**

1. Log on to VS GUI.
2. Click any of the column headers to change the sort order.

![Figure 14: Sorting by Column](image)

3. Click on the column header again to return to the default sort order.

### 3.8.2 Sorting Pending Appointments by Column

You can sort the pending appointments of a patient by Date, Clinic and Status. Date sort is the default and the non-cancelled appointment closest to today’s date is displayed.

**To sort by column:**

1. Log on to VS GUI.
2. Click the Date, Clinic or Status column header to change the sort order.

![Figure 15: Sorting Pending Appointments list by Column](image)
3.8.3 Print Pending Appointment List for a Patient
The VS GUI allows for print of the Pending Appointment List. Use the following procedure to print.

1. Log on to VS GUI.
2. In the “Search” field, search for the name of the patient you wish to print pending appointments for.
3. Right click in the Pending Appointments section. Select Print Pending from the menu. Select desired printer, and then click Print.

Figure 16: Print Pending

Figure 17: Select Desired Printer
3.9 Printing and Exporting a Request Management Grid

3.9.1 Printing a Request Management Grid

The VS GUI also allows for printing of a Request Management Grid. Use the following procedure to print a request grid.

**Note:** Only requests downloaded on the Request Management Grid will print.

1. On the Ribbon Bar, in the Tools section, select the **Print** option.

![Figure 18: Selecting the Print Option](image)

2. Select the desired printer, and then click **Print**.

![Figure 19: Selecting a Printer](image)
3.9.2 Exporting a Grid

The VS GUI also allows for exporting of a Request Management Grid in Microsoft Excel format.

To export a schedule:

1. On the Ribbon Bar, in the Tools section, select the **Export** option.

2. In the **Save As** dialog box, type a file name, select a file type, browse to the location where you want to save the information, and then click **Save**.

3. Open the file and review the contents. All data displayed in the Request Management Grid is saved.

**Note:** Only data that was loaded on screen at the time of export will be exported to the file. Users may need to load more screens to see all the data.

3.10 Viewing

3.10.1 View Only Mode

A View Only mode is available for non-scheduling personnel. To provide this mode to a user, you will need the option SDECRPC, and the SDECVIEW security key must be assigned to the user. This mode allows users to view data in VS GUI but no changes or edits will be allowed. This key overrides other VS GUI keys and assigns the user to View Only of the Task Tab.

Information available for viewing includes:

- All Pending Requests
- Previously scheduled appointments
- Clinic with appointments scheduled
• Provider with appointments scheduled
• Clinic Group with appointments scheduled
• Patient demographics and special needs/preferences
• Expanded Entry to display appointment audit details such as create date/time
• Query Tool to display a custom list of open requests

3.10.2 Viewing Requests by Request Type

A Scheduler can view requests for Veteran Appointments (APPT) requests—Consults, Procedure, Veteran, Patient-Centered Scheduling reminders, or EWL reminders. The default view is for requests that are 90 days or older. Users can change the view for a particular session or change the default view by changing their user preferences (refer to Section 4.9).

Requests display 25 records at a time. Additional requests can be viewed by going to the next page.

To view requests by request type:

1. Log on to VS GUI.
2. View the request grid. Consult, APPT, EWL, Procedure, and Patient-Centered Scheduling requests that have a wait time of 90 days or more will appear in the grid. The preferred date for the patient request type is shown in the Clinically Indicated Date (CID)/Preferred Date column.

3. Click the Request Type column to filter specific requests. Only request types that are in the current request grid display in the filter tool.
   a. Select EWL to view the Electronic Wait List requests.
   b. Select APPT to view appointment requests (and RTC requests if the category does not appear on its own.)

![Figure 21: Request Type Column](image-url)
c. Select RTC to view Return to Clinic requests (may be included in APPT for some views including the query tool)

d. Select Patient-Centered Scheduling to view Patient-Centered Scheduling requests.

e. Select Procedure to view procedure requests.

f. Select Consult to view consultation requests.

g. Or you can use any combination of the above.

3.10.3 Viewing Requests by Patient

To view requests by patient:

1. Log on to VS GUI.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234), Click Search, and then select the requested patient’s name.

3. In the Request Type dialog box select either APPT or PATIENT-CENTERED SCHEDULING, and then click OK or click Cancel to see the existing open requests.

The patient’s pending requests are displayed in the Request Management Grid, 25 records at a time. Booked appointments are displayed in the Pending Appointments window on the Ribbon Bar of the Tasks tab.

3.10.4 Schedule View

The buttons across the top of the calendar are the only working method to change the view the schedule.
The default schedule view displays the clinic schedule by week, but the view can be changed to day or month view for ease of scheduling. To change the schedule view:

1. Log on to VS GUI.
2. Search and select a Clinic to open.
3. To change a view for a specific schedule, at the top of the Schedules section, click the tab of your choice. The available views from the schedule include:
   - Day
   - Week
   - Month
   - Timeline

See the week view display below.

![Figure 24: Changing View of a Specific Schedule](Image)

4 Ribbon Bar

The following section outlines the features available in the Ribbon Bar of Schedule Manager.

4.1 Patients Demographics

4.1.1 Finding a Patient

1. Log on to VS GUI.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.
3. Select the requested patient’s name from the list.
4.1.2 Viewing Patient Demographics in the Ribbon Bar

You can view basic patient demographic information in the Ribbon Bar; it provides a limited amount of patient information, but you can choose to display more patient details. To view patient demographics in the Ribbon Bar:

1. Log on to VS GUI.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.

View the patient demographics in the Ribbon Bar. The following patient demographics are available:

- **Name:** Last name, First name
- **Patient Type:** VA patient type
- **DOB:** Date of birth in mm/dd/yyyy format
- **Gender:** Male (M) or female (F)
- **Street Address:** Patient’s street address
- **City/State:** Patient’s address city and state
- **Ward:** For inpatients, current ward location display
- **Svc Connected:** Is the patient service connected (YES or NO)
- **SC Percent:** Percent of service connected disability
- **PCP:** The patient’s Primary Care Provider
- **MHP:** The patient’s Mental Health Provider
- **Phone:** List the primary phone number of the patient
Figure 26: Patient Demographics in the Ribbon Bar
3. Click anywhere in the Select Patient section of the screen to view the Patient Inquiry Detail screen. This allows for viewing of additional patient information, including the patients Primary Care team and provider, if applicable.

![Patient Inquiry Detail](image)

**Figure 27: Patient Inquiry Detail**

### 4.1.3 Patient Eligibility Information

When adding a new Patient-Centered Scheduling or APPT request, the **Patient’s Eligibility Information** window displays along with the **New Appointment** dialog box. The user can move the **Patient’s Eligibility Information** window around the screen, for convenience. Changes to eligibility may take 5 to 20 minutes to show in VS GUI as there are task jobs running to verify the change before it is fully posted to the patient’s file. Please refresh if you know the patient had a recent change in eligibility.

The window includes:

- SC Percent
- Current Disabilities
- Primary and Secondary Eligibility Codes
When the New Appointment dialog box is closed, the Patient Eligibility Information window closes automatically.

### 4.1.4 Updating Patient Demographics

Patient demographic information, such as ethnicity, race, address, state, ZIP code, country, or phone numbers that were not defined during registration, can be updated at any time during the process. Perform the following procedure to update patient demographic data.

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name. Click Search.
3. Press CTRL+p to open the Patient Info screen. Alternatively, right click in the patient demographics box or the patient preferences box.

Patient demographic information can now be displayed and edited at any point in the process. Undefined patient demographic information displays in lists and text fields, on the Patient Information window.

**Note:** Information that appears dimmed cannot be edited.
4. Click **OK** to update patient demographics. At this point, the updated information displays in the Ribbon Bar.

5. Click **Cancel** to go back to the all patients view.

**Note:** If the patient is being edited in VistA Register a Patient or Load/Edit Patient Data and the user attempts to save edits made to the Patient Info data, a “Patient is being edited” warning message will appear and the user must click OK and Cancel to get out of the Patient Info screen until the VistA Register a Patient or Load/Edit Patient Data option is exited.

4.1.5 Editing Permanent Address

The Permanent address for a patient can be edited.

![Patient Information Dialog](image)

**Figure 29: Patient Information Dialog**

![Patient is Being Edited Warning Pop-up](image)

**Figure 30: Patient is Being Edited Warning Pop-up**
1. Point to the **Patient Info** screen, which is available at any point via the RM Grid.

2. Press **CTRL + P** to view the patient’s information.

A user can update the patient’s address Line 1 and 2, Zip Code, and Phone Numbers.

- Zip Code – five or nine digits (when entered, the system provides choices for Cities that match that zip code and based on that, automatically completes the State and County fields).

- For Phone numbers, VS GUI automatically formats the Patient Work Phone to (xxx) xxx-xxxx if 10 digits are entered. If more than 10 digits are entered, it auto formats to x-xxx-xxx-xxxx x….

  Only characters (,), +, -, and X (Except Cell and Pager) are allowed in the Phone Numbers.

3. Click **OK** when complete to save the information.

![Figure 31: Patient Info Dialog–Permanent Address](image)

**Note:** Areas highlighted in gray cannot be edited.

### 4.1.6 Adding a Temporary Address

A temporary address can be entered for a patient.

1. Point to the **Patient Info** screen.

2. Press **CTRL + P**, which is available at any point in the RM Grid.

**Note:** The Address Active Box should be checked with a Start Date and End Date
A user can update the patient’s address Lines 1 – 2 and Zip Code. Zip Code can be five or nine digits (when entered, the system provides choices for Cities that match that zip code and based on that, automatically completes the State and County fields).

3. Click **OK** when complete to save the information.

![Figure 32: Patient Info Dialog – Temporary Address](image)

**Note:** Areas highlighted in gray cannot be edited.

### 4.1.7 Bad Address

A patient’s address may be incorrect (e.g., mail has been returned as undeliverable, or if the patient is homeless). If you learn that a patient’s address is incorrect, you must indicate that information on the patient’s record so notices are no longer sent. The incorrect address can be indicated while updating the patient’s address information in the Patient Info dialog.

1. Log on to VS GUI as a Scheduler.

2. From the Tasks tab, in the **Search** text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click **Search**, and then select the requested patient’s name.
3. In the Request Type dialog box, click Cancel.

4. Press CTRL + P to open the Patient Information dialog screen. Confirm that
   the patient’s address information is incorrect or missing, and then click to
   check the Bad Address check box.

5. Choose the reason for the bad address:
   a. Undeliverable
   b. Homeless
   c. Other
d. Address Not Found

6. Click **OK**.

Note: If a scheduler later obtains a correct address and updates the patient’s record, the scheduler must ensure that the bad address flag is REMOVED manually. If the bad address remains, mail will not resume being sent to the patient.
4.2 Actions

4.2.1 New Request

After searching for and accessing a specified patient’s demographics and associated pending appointments, the Actions pane allows you to create a new request for the patient. For example, creating a Patient-Centered Scheduling request as a follow-up to an appointment request or creating a new appointment request after looking at only patient information.

**To start a new request for an already selected patient:**

1. Patient demographics and pending appointments appear in the Ribbon Bar. In the Actions pane, select **New Request**.

   ![Figure 36: Actions Pane](image)

   The Request Type dialog box opens.

   ![Figure 37: Request Type – APPT](image)

2. Click the Request Type, and then click OK.

4.3 Pending Appointment Window

The Pending Appointment Window displays a patient’s existing appointments. The appointment view defaults to the current date. The Scheduler can utilize the scroll bar to the right to scroll up to view appointments 365 days in the past. Or, the Scheduler can utilize the scroll bar to scroll down to view appointments 1000 days in the future.

Selecting an appointment from the Pending Appointment window in the Ribbon Bar opens the Clinic Schedule Grid. When you select a past appointment, the clinic schedule defaults to the appointment’s date.
Right click on an existing appointment in either the Pending Appointments box or in the calendar to select Expanded Entry. This will show the audit history of that appointment’s creation, check in, etc.

The clinic schedule defaults to the current date (today’s date) when you select an appointment dated “today” or less than three days in the future.

The clinic schedule defaults to -/+ three days of the appointment date for future dates.
Figure 40: Pending Appointment Window – Future Appointment Dates

Clinic Schedule displays future appointment date as -3/+3 days of appointment date.
4.4 Special Needs/Preferences

4.4.1 Adding/Removing Special Needs/Preferences from Requests

Patients visiting the VA may require additional assistance when they arrive for their visit. Some of these special needs/preferences may include issues with hearing, how they are arriving at the VA, Day of the Week or Time of the Day, etc.

To add Special Needs/Preferences to an appointment request:

1. Log on to VS GUI
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name. Click Search.
3. Press CTRL + P to open the Patient Info dialog box.
4. Select the patient’s special needs from the Special Needs/Preferences section of the Patient Info dialog box.
5. Add additional information regarding patient’s Special Needs/Preferences selections in the Remarks field.

6. Click OK. The Special Needs/Preferences entered display in the Ribbon Bar.

Figure 41: Patient Info Dialog – Special Needs/Preferences Section

Figure 42: Ribbon Bar – Special Needs/Preferences
4.5 Patient Flags

PRFs are used to alert VHA medical staff and employees of patients whose behavior and characteristics may pose a threat either to their safety, the safety of other patients, or compromise the delivery of quality health care. PRF assignments are displayed during the patient look-up process. Each PRF includes a narrative that describes the reason for the flag and may include some suggested actions for users to take when they encounter the patient.

When a patient’s record is flagged, a message window opens with an appropriate action recommended.

![Image of Patient Record Flags Dialog](image)

**Figure 43: Patient Record Flags Dialog**

1. Select an appropriate action.
2. To continue processing the appointment, click **Continue**; otherwise, click **Cancel**.

Once processing has continued, the PRF continues to show on the Ribbon Bar. If the user clicks on PRF in the flag box in the ribbon bar, the pop up box containing flag details will return.
4.6 Tools

4.6.1 Print

Note: The print buttons in the letter printing window previously read Print (Local) and Print (Server). Now they read Print (Windows Printer) and Print (VistA Print Device), respectively.

Refer to Section 3.8.3 for details on printing the pending appointments list for a patient.

Refer to Section 3.9.1 for details on using the Print functionality in the Tools Pane via a network printer. If you are printing a patient letter using this method, the address will print too high on the page to fit into a windowed envelope.

Refer to Section 6.1.1 for details on printing using an active VistA print device. This method is vastly preferred as it places the address into the correct spot for windowed envelopes and allows schedulers to print to their office printer, centralized printers or other bulk mail devices that are used in VistA for processing outgoing mail.

4.6.2 Export

Refer to Section 3.9.2 for details on exporting the request grid.
4.6.3 Refresh

After checking a patient’s pending appointments or checking availability for a clinic, you may want to reset the GUI back to the default view from when you first logon to the GUI, clearing all text entered in any fields.

1. To refresh the GUI, go to the Tools pane.
2. Click Refresh. The GUI resets to its default logon view.

![Figure 45: Refresh Button in Tools Pane](image)

4.6.4 Query

In order to sift through patient data and only view data of a specific type, the Query tool can be utilized to show only data matching specific criteria. Once the query has been performed, only records matching the query criteria appear in the request grid.

- Patients are in Group A and can be used independently or in conjunction with other search criteria.
- Request Type + Clinic/Services are in Group B. This group can be used independently or in conjunction with other search criteria.
- Priority, Wait Time, SC Visit, Service Connected, Origination Date, CID/Preferred Date and Urgency are in Group C. This group must be combined with other search criteria from either Group A, Group B, or Group A and B to satisfy the Query Tool business rules.

To perform a query:

1. Log on to VS GUI.
2. Select Query from the Tools pane. The Request Query window displays.
3. Click **Submit**. If the search criteria rules are not satisfied, a **Query Rule Validation** dialog box displays.

![Query Rule Validation](image)

**Figure 47: Query Rule Validation**

Once all search criteria has been selected and the results have been returned, a **Request Query Confirmation** dialog box displays the number of records found that satisfied the search criteria.

![Request Query Confirmation](image)

**Figure 48: Request Query Rule Confirmation**

4. Click **OK** to display the Query results in the Request Management Grid.
5. Click **Cancel** to remove search criteria and start a new search.
Note: RTC requests are a subtype of Appointment Requests. In version 2.0.0.14, chose Appointment to see both APPT and RTC requests. In addition, the query tool will only return the first 200 entries found in the search. The user will be asked if they want to continue and view the first 200, or go back to limit the search. Once the list displays, page forward until the user reaches the end of the list to sort/filter on the entire list. The query tool will retain the search criteria of the last search in a user’s session to aid the user while they work a list of open requests.
4.7 Settings – User Preferences

Users may now set their own column preferences within a session or as their default view. From the far right of the Ribbon Bar, select the User Preferences setting icon.

The current column order is:

- Request Type;
- Wait Time; (Wait time calculated from Create date to today)
- Patient (PT) Name;
- Multiple Return To Clinic (MRTC);
- SSN;
- SC Visit;
- Telephone;
- Priority;
- CID/PreferredDate;
- Entered/RR No Date;
- Requestor;
- Requested By;
- Clinic/Service; and
- Comment

Note: Users can drag and drop columns to reorder them. Save as default and accept to save the order from session to session. Reordered columns do NOT have any effect on log in times, and are highly encouraged as Clinic/Service and CID/Preferred Date are far to the right in the default order.
Filters on the following fields are also available:

- Request Time
- Wait Time
- CID/Preferred Date
- Clinic/Service
- SC Visit
- Priority
- Entered/RR (Recall Reminder) No Date

NOTE: Adding filters to user preferences is highly discouraged at this time. If the user restricts their log in with filters, and the system cannot find any open requests, the log in will take an excessive amount of time. If a user experiences long log in times, clear all preferences.

To save your user preferences:

1. Select the sort order or filters to display.

   To save the selections as your default view, select “Save as Default View” on the bottom right. If you do not select “Save as Default View,” your selections will only be applicable to your current session.

2. Click OK to save.

   Note: If you filter the requests to view only Consult requests you will not see the PtCSch requests unless you unfilter the preferences.

   The User Preferences Settings icon is highlighted in green indicates the user preferences are stored.
To remove any existing user preferences for the user’s default view:

1. Click the User Preferences icon.
2. In the User Preferences window, click **Clear, Save as Default View**, then click **OK** to save.

The User Preferences Settings icon will now display without the green highlight when no user preferences have been stored.

![Figure 50: Settings – Save as Default View](image)

5 Request Management

5.1 Request Management Procedures

5.1.1 Viewing a Patient’s Existing Requests

1. Log on to VS GUI.
2. From the **Tasks** tab, in the **Search** text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click **Search**, and then select the requested patient’s name.
3. Click Search.
4. Select the requested patient’s name from the list.

In the Request Management grid, view the existing requests for the selected patient.

**Note:** The patient’s booked appointments display in the Pending Appointment Window in the Ribbon Bar. The default is the current date. Schedulers can scroll up or down to view appointments dated -365 days to +1000 days of the current date.
5. Click a Request Type entry and the Prerequisites screen opens. **Prerequisites are for RTCs only and the Prerequisite box will open if there is a Prerequisite note. #NLT# will display in the comments if the provider selected “NO LATER THAN” for a priority request.**
   - The Prerequisite screen will remain open while the user is on the Request Management Grid.
   - If switching to a Request Type with no Prerequisites, then the Prerequisite screen will go away.

![Figure 51: Request Grid and Pending Appointments](image1)

![Figure 54: Prerequisite Screen](image2)

6. Right-click on an appointment in the Pending Appointments block and the EXPAND ENTRY block opens.
7. Click the Expand Entry block to see the expanded appointment information.
   - Appointment Demographics
   - Appointment Event Log
   - Appointment Wait Time
   - Patient Information
   - Encounter Information (this information will only display if the encounter information has been entered for this patient)
Figure 53: Appointment Demographics

Figure 54: Appointment Event Log

Figure 55: Appointment Wait Time
5.1.2 Adding Appointment Request

1. To submit an appointment request, from the **Tasks** tab search for the patient using the Search field.

2. Select **APPT** in the **Request Type** dialog box.
Figure 58: Request Type - APPT

Note: If the patient has already been selected, the Request Type dialog box can be accessed via New Req, in the Actions Pane of the Ribbon Bar.

Figure 59: Actions Pane—New Req. Selection

3. In the Appointment Request dialog box, confirm Patient Information details.

4. In the Appointment Request dialog box, complete the Request Information section.

5. Click the Clinic or Service/Specialty button. For Clinic, enter clinic name (minimum of six characters) or Clinic abbreviation. For Service/Specialty enter service or specialty (minimum of six characters required).

6. Enter CID/Preferred Date for the preferred appointment/Patient-Centered Scheduling date. Enter date directly or select date from Calendar control option. CID/Preferred Date can be past, current, or future.

7. Select Appointment Type if not defaulted by patient eligibility and clinic selection then choose from the list.

8. In Requested By, select either Provider or Patient.

If Provider is selected, then enter the provider name (three-character minimum for the list to populate) and select from the list.

Note: If the Patient was selected from Requested By, then the Provider field appears dimmed and cannot be edited.

   o Status is automatically populated.
      a. Established – The patient has been seen at that clinic in the past 24 months.
      b. New – The patient has not been seen at that clinic in the past 24 months.

Refer to Section 6.3.2 for additional instructions regarding Multiple Appointments Required check box options.
If needed, users can view existing special needs and preferences in the middle section drop down box. If changes are needed, the user can call the edit special needs and preferences box by **CTRL + P**, complete the **Special Needs/ Preference** section. The **Remarks** field is available to add clarifying information regarding selections made. **Selected Special Needs/Preferences** and **Remarks** display in the Ribbon Bar.

**Note:** Text can be added in the **Remarks** field up to 80 characters to add information regarding the Appointment Request. Text displays in the Request Management Grid under the Comment column.

9. **Click OK.**

Updated demographics display in ribbon bar. The APPT Request appears on the Request Management grid. The Clinic Schedule Grid opens for the clinic specified in the request.

**Note:** APPT Requests with Comments are flagged with a red arrow in the Request Management Grid.
5.1.3 Viewing/Editing Appointment Request

If a request (APPT, EWL, Veteran) needs to be reviewed or modified before being booked, you can View/Edit the request in the Request Grid:

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and the last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name. Click Search.
3. Select the requested patient’s name from the list.

Note: When the Spacebar + Search is used, the Ribbon Bar and Request Management Grid adjust to that selected patient.
4. In the Request Management grid, right-click the applicable APPT request.
5. Select APPT/VETERAN Disposition option.

The following options appear for selection:

- View Request
- Edit Request
- Transfer to EWL – refer to Section 5.1.5 for instructions
- Death
- Removed/Non-VA Care
- Removed/Scheduled-Assigned
- Removed/VA Contract Care
- Removed/No longer Necessary
- Entered in Error

Figure 62: Appointment Request Dialog
6. Select **View Request**. The **Appointment Request** dialog box opens with everything dimmed as the dialog box is Read-Only.

![Appointment Request dialog box](image)

**Figure 63: View Request (Read Only)**

7. Click **OK**.

You return to the Request Management Grid.

8. Right-click the applicable **APPT** request.

9. Select the APPT/VETERAN Disposition option.

The following options appear for selection:

- View Request
- Edit Request
- Transfer to EWL. Refer to Section 5.1.5 for instructions
- Death
- Removed/Non-VA Care
- Removed/Scheduled-Assigned
- Removed/VA Contract Care
- Removed/No longer Necessary
- Entered in Error

10. Select Edit Request.

The Appointment Request and Patient’s Eligibility Information dialog display.

![Figure 64: Edit Request (Request Information Only)](image)

The editable fields are Clinic/Service Specialty; Appointment Type; Requested By; Provider, and Comments. The CID/Preferred Date CANNOT be edited.

11. Click OK.

The request returns to the Request Management Grid with the updated information listed.

Note: If you change the request for a Clinic to a Service/Specialty request, the Appointment Type field can then be edited. Also, changes to the APPT Request are tracked by the system in the SDEC APPT REQUEST file.

### 5.1.4 Disposition or Removing an Appointment Request

If an APPT request is no longer needed, the Scheduler can remove it from the Request Grid following the steps below.

1. Log on to VS GUI as a Scheduler.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.
3. Click Search.
4. Select the requested patient’s name from the list.
5. In the Request Management grid, right-click the applicable APPT request.
6. Select APPT/VETERAN Disposition option.

The following options appear for selection:

- Transfer to EWL. Refer to Section 5.1.5 for instructions
- Death
- Removed/Non-VA Care
- Removed/Scheduled-Assigned
- Removed/VA Contract Care
- Removed/No longer Necessary
- Entered in Error

![Figure 65: APPT/Veteran Disposition Options](image)

7. Select the applicable APPT Disposition option. APPT Request is removed from Request Management Grid.

**5.1.5 Transfer to EWL Request for a Patient**

If an appointment cannot be scheduled because of limitations, the patient is put on an EWL for future scheduling. Use the following procedures to transfer an APPT Request to an EWL Request.

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.
3. In the Request Type dialog box, click Cancel.
4. In the Request Management grid, view the open APPT Requests for the patient.
5. Select the APPT request that needs transferred to EWL.
6. Right-click the APPT request and select APPT/VETERAN Disposition.
7. In the APPT/VETERAN Disposition options, select **TRANSFER TO EWL**. The **EWL Request** dialog box displays.

**Note:** The Transfer to EWL option is not available for MRTC appointments nor is it available for users who do not have the SDWL MENU Security Key.

Confirm **Clinic** is the default in the dialog box. If not, search for and select the appropriate Wait List Clinic by name. Searching by clinic abbreviation is not supported in the EWL Request dialog.

**Note:** Clinic or Service (stop code) does not default if it is not activated as Wait List Clinics in SD Wait List Parameter (File #409.32).

**CID/Preferred** date and Status are not editable.

**Appointment Type** is the default from APPT Request Clinic. If a patient is a Veteran and the Service Related box is checked, the Appointment type defaults to Service Connected. Also, if the Service Connected disability is greater than or equal to 50%, the Appointment type defaults to Service Connected. This puts the EWL request in a higher priority than other EWL requests.

**Requested By** and **Provider** are populated from the original APPT request but are editable.

Enter **Comments** as appropriate.

8. **Click OK**.

The request grid shows requests of the selected patient. The newly added request is selected. The calendar defaults to the desired date and shows the clinic schedules.

![EWL Request Dialog](image)

**Figure 66: EWL Request Dialog**
5.1.6 Disposition or Removing a Patient from the EWL

If a patient is on the EWL for an appointment or a consult, and information is received that the patient no longer needs the appointment, the EWL request can be removed and will no longer appear in the Request Management Grid.

To disposition or remove the EWL Request:

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name. The patient must have an existing EWL request.
3. In the request grid, right-click the desired EWL request and select the EWL Disposition.

The following EWL Disposition options are available for selection:

- Death
- Removed/Non-VA Care
- Removed/Scheduled-Assigned
- Removed/VA Contract Care
- Removed/No longer Necessary
- Entered in Error
- Transferred

The EWL Request is removed from the Request Management Grid and the next APPT Request is moved up and highlighted.

5.1.7 Adding Patient-Centered Scheduling Request

To add a new Patient-Centered Scheduling request for a patient:

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.
3. Click the New Req button in the Actions pane.
4. In the Request Type dialog box, select PATIENT-CENTERED SCHEDULING (PtSch) and click OK.
5. Enter a **Patient-Centered Scheduling Date**. Enter the date the provider requested.

6. Enter a **Patient-Centered Scheduling Date** (per patient). Enter the date the patient prefers.

7. Enter a Patient-Centered Scheduling Appt Type.
   - Follow up
   - Consultation
   - Routine
   - Evaluation

Check the box for **Fasting** if the patient needs to fast for the appointment.

8. Enter the **Length of the Appointment**.

9. Select **Clinic** (the Clinic can be searched by Clinic Name with 6-character minimum or by the Clinic’s abbreviation with a 4-character minimum).

**Note:** The Clinic does not appear for selection if the Patient-Centered Scheduling Reminders Letter is not defined for the clinic.

10. Select Patient-Centered Scheduling **Provider** (3-character minimum).

11. Enter a **Comment**.

12. Press **Ctrl + P** to view the **Special Needs/Preferences** window for the Patient Info dialog box and add or edit preferences as appropriate.

13. Click **OK**.

The request grid shows requests of the selected patient. The newly added request is selected. The calendar defaults to the desired date and the selected clinic and defaults, and shows the clinic schedules.

View the **Special Needs/Preferences** window in the ribbon bar to confirm it is updated.
5.1.8 Viewing/Editing Patient-Centered Scheduling Request

If a Patient-Centered Scheduling request needs to be reviewed or modified before being booked, you can View/Edit the request in the Request Grid using the following steps:

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.
   
   Note: When Spacebar + Search are used, the Ribbon Bar and Request Management grid adjust to that selected patient.
3. In the Request Management grid, right-click the applicable Patient-Centered Scheduling request.
4. Select the Patient-Centered Scheduling Disposition option.

The following options appear for selection:

- View Request
- Edit Request
- Failure to respond
- Moved
- Deceased
- Doesn’t want VA services
- Received care at another VA
- Other
Figure 69: Patient-Centered Scheduling Disposition Dialog
5. Select **View Request**. The **Patient-Centered Scheduling Request** dialog box appears with the contents dimmed as the dialog box is Read-Only.

![Patient-Centered Scheduling Request dialog box](image)

**Figure 70: Patient-Centered Scheduling Appointment View Request Dialog**

6. Click **OK**. You return to the Request Management Grid.

7. Right-click the applicable **Patient-Centered Scheduling** request.

8. Select Patient-Centered Scheduling Disposition.

The following options appear for selection:

- View Request
- Edit Request
- Failure to respond
- Moved
- Deceased
- Doesn’t want VA services
- Received care at another VA
- Other

9. Select **Edit Request**. The Patient-Centered Scheduling Request dialog displays.
Figure 71: Patient-Centered Scheduling Disposition Dialog
Figure 72: Patient-Centered Scheduling Appointment Edit Request Dialog

**Note:** The editable fields are PtCSch Appt. Type, Fasting, Length of Appt., Clinic, PtCSch Provider, and Comment. Note the PtCSch Date and PtCSch Date (Per Patient) are not editable.

10. Click **OK**. The request returns to the **Request Grid** with the altered information listed.
5.1.9 Disposition or Remove Patient-Centered Scheduling Request

To cancel or delete a Patient-Centered Scheduling request:

1. Log on to VS GUI as a Scheduler.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.

3. In the RM Grid, right-click the Patient-Centered Scheduling request and select PtCSch Disposition. The following dispositions are available for selection:
   - Failure to respond
   - Moved
   - Deceased
   - Doesn’t want VA services
   - Received care at another VA
   - Other

![Figure 73: Patient-Centered Scheduling Disposition Options](image)
4. From the **PtCsch Comment** dialog box, enter comments as necessary. Only the current comment entered is displayed although there is an Audit Log of Uses that created previous comments.

![PtCsch Comment Dialog Box](image)

**Figure 74: PtCsch Comment Dialog Box**

5. Click **OK**. The patient is removed from the request grid. Certain dispositions will present a **Patient Contacts** message pop-up if the business rules were not met. To disposition the request, click **Yes** to acknowledge the warning.

![Patient Contacts](image)

**Figure 75: Warning Pop-Up If Business Rules Were Not Met**
Note here the Request Type, Dispositions, and Contact Message information.

<table>
<thead>
<tr>
<th>Request Type</th>
<th>Dispositions</th>
<th>Contact Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>PtCSch</td>
<td>Failure to Respond</td>
<td>Required Number message gets Comment asked in VistA</td>
</tr>
<tr>
<td></td>
<td>Moved</td>
<td>comment</td>
</tr>
<tr>
<td></td>
<td>Deceased</td>
<td>comment</td>
</tr>
<tr>
<td></td>
<td>Doesn’t want VA Services</td>
<td>comment</td>
</tr>
<tr>
<td></td>
<td>Received Care at another VA</td>
<td>comment</td>
</tr>
<tr>
<td></td>
<td>Other</td>
<td>Required Number message gets Comment asked in VistA</td>
</tr>
<tr>
<td>EWL</td>
<td>Death</td>
<td>closes</td>
</tr>
<tr>
<td></td>
<td>Removed/Non-VA Care</td>
<td>closes</td>
</tr>
<tr>
<td></td>
<td>Removed/Scheduled-Assigned</td>
<td>closes</td>
</tr>
<tr>
<td></td>
<td>Removed/VA Contract Care</td>
<td>closes</td>
</tr>
<tr>
<td></td>
<td>Removed/No Longer Necessary</td>
<td>Required Number message</td>
</tr>
<tr>
<td></td>
<td>Entered in Error</td>
<td>closes</td>
</tr>
<tr>
<td></td>
<td>Transferred</td>
<td>closes</td>
</tr>
<tr>
<td>APPT</td>
<td>Transfer to EWL</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Death</td>
<td>closes</td>
</tr>
<tr>
<td></td>
<td>Removed/Non-VA Care</td>
<td>closes</td>
</tr>
<tr>
<td></td>
<td>Removed/Scheduled-Assigned</td>
<td>closes</td>
</tr>
<tr>
<td></td>
<td>Removed/VA Contract Care</td>
<td>closes</td>
</tr>
<tr>
<td></td>
<td>Removed/No Longer Necessary</td>
<td>Required Number message</td>
</tr>
<tr>
<td></td>
<td>Entered in Error</td>
<td>closes</td>
</tr>
</tbody>
</table>

Figure 76: Request Type/Dispositions/Contact Message Reference

5.2 Contacting a Patient

A patient may need to be contacted by phone or letter to schedule an appointment. Contact efforts can be added to the patient record for APPT and EWL requests. They are viewable in the GUI and are stored in the SDEC APPT REQUEST file.

5.2.1 New Contact Attempt

To document New Contact Attempt information:

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name (or the patient’s first initial of the last name) and last four of the SSN (e.g. S1234).
3. Click Search.
4. Select the requested patient’s name from the list.
5. In the request grid, right-click APPT, PtCSch, or EWL request type, and then select **Contact Attempts**. The following Contact Types are available for selection:
   - Call
   - Letter

6. Select Call or Letter

![Figure 77: Contact Attempts](image)

The **New Contact Attempt** dialog box displays showing, Patient Name, Clinic Name, Desired Appt. Date, Request Type, and Patient phone numbers. Select Call or Letter and accept the default contact date/time (which is the time the New Contact Attempt dialog was opened) or change as appropriate. You can change the Date/Time to a past Date/Time to document when the contact attempt was created. Backdating an attempt will still reflect the entry date and time in the far-right column.

![Figure 78: Patient Contact Dialog](image)
7. Enter the phone number that was contacted, if desired, and provide any appropriate information in the Comments section.

8. Click Submit to enter the Call Attempt details, which will be displayed at the bottom of the New Contact Attempt screen and highlighted in Green.

The above procedures can be repeated as many times as needed to attempt to contact the patient. There is no limit to the number of attempts that can be created.

Figure 79: New Contact Attempt Submitted and Displayed

Note: The name of the person entering the contacts, the date the contact was entered, and the attempt date/time are shown.

- For Non-Mental Health appointment contacts, a call and a letter (letter must be at least 14 days old) are required prior to system dispositioning without an appointment.
- Mental Health appointment contacts require 3 calls on different calendar days (ex. Monday, Tuesday, Wednesday). At least one letter is required (letter must be at least 14 days old) and can be on same day as a call attempt.
- Attempting to disposition prior to the above rules being met will result in a warning message of the business rules not being met (See Figure 77). Click Yes to acknowledge the warning and disposition the request or Click No to return to Request Management Grid.

Figure 80: Displaying Name of Person Entering Contacts
After making an appointment the request is dispositioned and removed from Request Management. If the appointment is cancelled, the request returns to the grid and the current field in **Contact Attempts** changes to false and is a tan color.

![Appointment Canceled](image)

**Figure 81: Appointment Canceled**

After making a New Contact Attempt after the cancellation, the new attempt will be green and the **Current** field will be “True”.
Figure 82: New Contact Attempt After Cancellation
6 Appointment Management

6.1 Adding Appointments

6.1.1 Add Appointment for Appointment Request

1. Log into VS GUI as a Scheduler.

2. From the Tasks tab, type the patient’s last name and first name in the Search text box. Click Search, and then select the requested patient’s name from the list.

3. In the Request Management Grid, select APPT request. The Clinic Schedule Grid displays the clinic schedule based upon CID/Preferred date of request. For past dates, the clinic schedule opens defaulted to current date. For current date (or CID/Preferred date less than three days in future), the clinic schedule displays defaulted to current date. For future dates, the clinic schedule displays +/- three days of CID/Preferred date.

Note: For newly created APPT requests, the system automatically highlights the APPT request and the Clinic Schedule displays.

Figure 83: Select APPT Request – Clinic Schedule Grid Display

4. In the Clinic Schedule Grid, select the available time slot. Uneven start times are available. Time Slot details display in the Time Slot Viewer.

Note: Refer to Section 7.1.7 for detailed information on Time Slot Viewer functionality.
5. Right-click in the time slot. Add **Appointment** option displays. The Create Walk In Appointment option is only available for selection on the current date. It is not available for past or future CID/Preferred dates.

![Figure 85: Right-click Options – Add Appointment](image)


The New Appointment dialog displays as well as the Patient Eligibility dialog box.

- **Appointments Tab:**
  - The **Patient Information** Section displays Name, DOB, SSN, Svc Connected, SC Percent, Global Assessment of Function (score) (GAF) (read only), and the Svc Related check box.
  - The **Appointment** information section displays Benefit/Eligibility (provides drop down for patients with multiple eligibility), Start Time, Appt Type, Duration, Clinic and Notes (Appointment Start Time; Duration on for appointments to VL Clinics; and Notes are editable fields). Information can be added pertinent to appointment.
  - The comments from the original request will populate the **Notes** field in the New Appointment dialog. This text is editable before the new appointment is created.
  - The **Appointment Conflicts** section displays any appointments already scheduled that potentially conflict with the appointment being added.
7. Add any applicable notes to the appointment. Click **OK**.

The Print Letter? Dialog box displays.

8. Click **OK** to print the Letter to the patient.

   Click **Cancel** if you do not want to print the letter.

9. To close the Request dialog box, click **OK**.
The APPT Request is removed from the Patient Request Management Grid. The Next request for patient is moved up and highlighted.
The Clinic Schedule closes and the next appointment clinic schedule opens.
The New appointment displays in the Pending Appointment Window on the Ribbon Bar.

10. Select appointment from the Pending Appointment window to view the appointment in the Clinic Schedule Grid. The clinic schedule opens. For past dates, the clinic schedule opens defaulted to the appointment date. For the current date (or appointment date less than three days in future), the clinic schedule displays defaulted to current date. For future dates, the clinic schedule displays +/- three days of appointment date.

For current date (or appointment date less than three days in future), the clinic schedule displays defaulted to current date. See below.
For future dates, the clinic schedule displays +/- three days of the appointment date. See below.

---

6.1.2 Add Appointment for EWL Request

1. Log into VS GUI as a Scheduler.
2. From the Tasks tab, type the patient’s last name and first name in the Search text box. Click **Search**, and then select the requested patient’s name from the list.

3. Click the **New Req** button in the Actions pane.

**Note:** Refer to Section 5.1.5 for steps on transferring the APPT request to the new EWL Request.

![Figure 92: Request Type](image)

4. In the Request **Management** Grid select the **EWL** request.

The Clinic Schedule Grid displays the clinic schedule based upon the CID/Preferred date of the request. For past dates, the clinic schedule opens defaulted to CID/Preferred date. For the current date (or the CID/Preferred date less than three days in future), the clinic schedule displays defaulted to the current date. For future dates, the clinic schedule displays -/+ three days of the CID/Preferred date.

**Note:** For the newly created Patient-Centered Scheduling request the system automatically highlights the APPT request and the Clinic Schedule displays. If the EWL is for a service/specialty, no grid is displayed and the clinic must be searched and selected.
5. In the Clinic Schedule Grid, select the available time slot. Time Slot details display in the Time Slot Viewer.

**Note:** See Section 7.1.7 for detailed information on the Time Slot Viewer functionality.

6. Right-click in the time slot. The **Add Appointment** option displays.

**Note:** The Create Walk In Appointment option is only available for selection on the current date. It is not available for past or future CID/Preferred dates.
Figure 95: Right-click Options – Add Appointment

7. Select Add Appointment.

The New Appointment dialog box contains the following sections:

- **Appointments Tab:**
  - The **Patient Information** section displays Name, DOB, SSN, Svc Connected, SC Percent, GAF (read only), and Svc Related check box.
  - The **Appointment** information section displays Start Time, Appt Type, Duration, Clinic and Notes (Appointment Start Time; Duration on for appointments to VL Clinics; and Notes are editable fields).
  - The **Appointment Conflicts** section displays any appointments already scheduled that conflict with appointment being added.

Figure 96: New Appointment Dialog

8. Add any applicable Notes to the appointment. The comments from the original request will populate the Notes field in the New Appointment dialog. Click **OK**.

The Print Letter? Dialog box displays.

9. Click **OK** to print the Letter to the patient. Click **Cancel** if you do not want to print the letter.

Figure 97: Print Letter? Dialog
10. If you do want to print the letter, click OK, and the print dialog box will pop up. If there is no letter in the box, contact your local clinic set up team to place that type of letter into the clinic’s set up. If there is a letter, decide whether to print to a network printer via Print (Windows Printer) or a VistA print device via the search box and Print (VistA Print Device). It is highly recommended to use the VistA method, as that will place the address in the correct position for a windowed envelope.

![Figure 98: Print to VistA Device Printer to place address in correct position](image)

11. To close the Request dialog box, click OK.

![Figure 99: Closing Request Dialog](image)

- The EWL Request is removed from the Patient Request Management Grid. The EWL request is dispositioned as scheduled.
- The Next request for the patient is moved up and highlighted.
- The Clinic Schedule closes and the clinic for the next request displays.
- The New appointment displays in the Pending Appointment Window on the Ribbon Bar.

12. Select appointment from the Pending Appointment window to view the appointment in the Clinic Schedule Grid. The clinic schedule opens. For past dates, the clinic schedule opens defaulted to appointment date.
For the current date (or the appointment date less than three days in the future), the clinic schedule displays the default, the current date. See below.

For future dates, the clinic schedule displays +/- three days of the appointment date. See below.
6.1.3 Add Appointment for Patient-Centered Scheduling Request

1. Log into VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.
3. Click the New Req button in the Actions pane.
4. In the Request Type dialog box, select Patient-Centered Scheduling (PtSch) and then click OK to create a new request or click Cancel for the existing request.
5. When a New Patient is searched, please select CANCEL when the Request Type box pops up. This will allow searching for existing requests before creating anything new.

Note: Refer to Section 5.1.7 for steps on adding a new Patient-Centered Scheduling Request.

6. In the Request Management Grid select Patient-Centered Scheduling request.
The Clinic Schedule Grid displays the clinic schedule based upon the CID/Preferred date of request. For past dates, the clinic schedule opens defaulted to the CID/Preferred date. For current date (or the CID/Preferred date less than 3 days in future), the clinic schedule displays defaulted to current date. For future dates, the clinic schedule displays -/+3 days of the CID/Preferred date.

**Note:** For a newly created Patient-Centered Scheduling request the system automatically highlights the PATIENT-CENTERED SCHEDULING request in the Request Management Grid and Clinic Schedule.

7. In the Clinic Schedule Grid, select the available time slot. Time Slot details display in the Time Slot Viewer.

   **Note:** See Section 7.1.7 for detailed information on Time Slot Viewer functionality.

8. Right-click in the time slot.

   **Add Appointment** option displays.

   **Note:** The **Create Walk In Appointment** option is only available for selection on the current date. It is not available for past or future CID/Preferred dates.
9. Select Add Appointment.

The New Appointment dialog box contains the following sections:

- **Appointments Tab:**
  - The **Patient Information Section** displays Name, DOB, SSN, SVC Connected, SC Percent, GAF (read only), and Svc Related check box.
  - The **Appointment** information section displays Start Time, Appt Type, Duration, Clinic and Notes (Appointment Start Time; Duration on for appointments to VL Clinics; and Notes are editable fields).
  - The comments from the original request will populate the Notes field in the New Appointment dialog.
  - The **Appointment Conflicts** section displays any appointments already scheduled that conflict with the appointment being added.

![New Appointment Dialog](image)

**Figure 107: New Appointment Dialog**

10. Add any applicable Notes to the appointment. The comments from the original request will populate the **Notes** field in the New Appointment dialog. Click **OK**.

The Print Letter? Dialog box displays.

11. Click **OK** to print the Letter to patient.

Click **Cancel** if you do not want to print the letter.
12. Click **OK**.

13. Select an appointment from the Pending Appointment window to view it in the Clinic Schedule Grid. The clinic schedule opens. For past dates, the clinic schedule displays defaulted to appointment date.

**Note:** The Patient-Centered Scheduling request is not immediately removed from the request grid. The request is removed when the task “CLEAN UP CLINIC PATIENT-CENTERED SCHEDULING ENTRIES” has been run and when the appointment is made within the CLEAN UP DAY SETTING in ENTER/EDIT CLINIC PATIENT-CENTERED SCHEDULING SITE PARAMS menu option.

The Clinic Schedule closes and the clinic for the next request displays.

The New appointment displays in Pending Appointment Window on the Ribbon Bar.
For the current date (or if the appointment date is less than three days in the future), the clinic schedule displays the appointment date as Day 1 + six days to current date.

For future dates, the clinic schedule displays +/- three days of the appointment date. See below.
Clinic Schedule displays future appointment date defaulted as -3/+3 days of appointment date.

Figure 112: Clinic Schedule Display – Future Date Appointment
6.1.4 Add Appointment for Consult Request

1. Log into VS GUI as a Scheduler.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.

**Note:** Consult requests are added from CPRS.

3. In the Request Management Grid select Consult Request.

**Note:** The Clinic Schedule does NOT display when selecting Consult request, as a consult is directed to an entire service, not a specific clinic. The scheduler should read the consult body in CPRS to determine which specific clinic or clinic group should be used, and then search for that clinic or group in the clinic schedules search box. Consult scheduling can benefit greatly from clinic groups when the specialty has more than one consult clinic that can be grouped and viewed side by side.

**Figure 113: Select Consult Request**

From the Clinic Schedules, enter the clinic name (six-character minimum).
4. In Clinic Schedule, click the available time slot. Time Slot details display in the Time Slot Viewer.

**Note:** See [Section 7.1.7](#) for detailed information on Time Slot Viewer functionality.

5. Right-click in the time slot.

**Add Appointment** option displays.

**Note:** The **Create Walk-In Appointment** option is only available for selection on current date. It is not available for past or future CID/Preferred dates.

6. Select **Add Appointment**.

The New Appointment dialog box displays as well as the Patient Eligibility dialog box.

- **Appointments Tab:**
  - The **Patient Information Section** displays Name, DOB, SSN, SVC Connected, SC Percent, GAF (read only), and Svc Related check box.
  - The **Appointment** information section displays Start Time, Appt Type, Duration, Clinic and Notes (Appointment Start Time; Duration on for appointments to VL Clinics; and Notes are editable fields).
  - The **Appointment Conflicts** section displays any appointments already scheduled that conflict with appointment being added.
7. Add any applicable Notes to the appointment. The comments from the original request will populate the Notes field in the New Appointment dialog. Click OK.

The Print Letter? dialog box displays.

8. Click OK to print the Letter to the patient.

Click Cancel if you do not want to print the letter.

9. Select the appointment from the Pending Appointment window to view it in the Clinic Schedule Grid.
The clinic schedule opens. For past dates, the clinic schedule opens to the default appointment date.

Figure 119: Clinic Schedule Display – Consult Past Appointment Date
For the current date (or appointment date less than three days in future), the clinic schedule displays the current date as the default. See below.

Figure 120: Clinic Schedule Display – Consult with Current Date
For future dates, the clinic schedule displays +/- three days of the appointment date. See below.
6.1.5 Add Appointment from Return to Clinic request (RTC)

1. Log into VS GUI as a Scheduler.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.

   Note: RTC requests are added from CPRS when the clinical staff use the National Return to Clinic Order and sign it.

3. In the Request Management Grid select the RTC Request and schedule the appointment. Scheduling the appointment while the RTC request is selected (orange) will automatically complete the corresponding order in CPRS.

   Note: If the RTC is for a single follow up appointment, it will follow the same steps as a Patient Centered Scheduling Request (PtCSch) in Section 6.1.3. If the RTC is for a series of follow up appointments, it will follow the same steps as in the MRTC requests in Section 6.3.1. Contact attempts can be added as appropriate.

4. If a RTC request has prerequisites from the RTC Order in CPRS, it will pop up an extra box with that information. If the prerequisite pop up box is accidently closed, it can be reopened, by clicking on the RTC order in the RM grid again.

5. If a RTC request must be dispositioned without making an appointment, right click on the RTC and select from the disposition drop down. The corresponding National Return to Clinic Order will respond accordingly.

### Table: APPT Request Dispositions and RTC Order Disposition

<table>
<thead>
<tr>
<th>APPT Request Dispositions</th>
<th>RTC Order Disposition</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>'D' FOR DEATH</td>
<td>Discontinued – alert to Provider</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>'NC' FOR REMOVED/NON-VA CARE</td>
<td>Discontinued – alert to Provider</td>
</tr>
<tr>
<td>'SA' FOR REMOVED/SCHEDULED-ASSIGNED</td>
<td>Completed</td>
</tr>
<tr>
<td>'CC' FOR REMOVED/VA CONTRACT CARE</td>
<td>Discontinued – alert to Provider</td>
</tr>
<tr>
<td>'NN' FOR REMOVED/NO LONGER NECESSARY</td>
<td>Discontinued – alert to Provider</td>
</tr>
<tr>
<td>'ER' FOR ENTERED IN ERROR</td>
<td>Discontinued – alert to Provider</td>
</tr>
</tbody>
</table>

### 6.2 Disposition Appointments

#### 6.2.1 Edit Appointment Information

Editing appointment information can be done within the VS GUI.

To edit appointment information:

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, type the patient’s last name and first name in the Search text box. Click **Search**, and then select the requested patient’s name from the list.
3. Point to the appointment to be edited in the Pending Appointments Window on the Ribbon Bar.

   The clinic schedule displays. For past appointment dates, the clinic schedule opens the default appointment date. For the current date (or appointment date less than three days in future), the clinic schedule displays the current date as the default. For future dates, the clinic schedule displays +/- three days of the appointment date.

4. In the Clinic Schedule Grid, point to the appointment, right-click on the appointment, and then select **Edit Appointment**.

   The Edit Appointment dialog box displays.

**Note:** See [Section 7.1.7](#) for detailed information on Time Slot Viewer functionality.
The only field that is editable is Notes.

5. Make any necessary edits to the appointment information, and then click OK.
6.2.2 View Appointment Information

Viewing appointment information can be done in the Clinic Schedule Grid in the VS GUI.

To view appointment information:

1. Log on to VS GUI.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.

3. Point to the appointment to be viewed in the Pending Appointments Window on the Ribbon Bar.

The clinic schedule displays. For past appointment dates, the clinic schedule defaults to the appointment date as Day 1 + six days. For the current date (or appointment date less than three days in future), the clinic schedule displays the default, the current date.
as Day 1 + six days. For future dates, the clinic schedule displays +/- three days of the appointment date.

4. In the Clinic Schedule Grid, point to the appointment, move the pointer over the appointment, and the appointment details display.

![Figure 124: Hover Box Displaying Appointment Details]

5. Right-click the appointment.


![Figure 125: Appointment Right-click Options – View Appointment]

The View Appointment dialog box displays. It is in read-only mode. No fields are editable.

7. Click **OK** to close the View Appointment dialog box.
6.2.3 Cancelling an Appointment

You can cancel an appointment without rebooking it.

1. Log on to VS GUI as a Scheduler.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.

3. Select a scheduled appointment from the Pending Appointment Window on the Ribbon Bar.

The clinic schedule displays. For past appointment dates, the clinic schedule opens the default, the appointment date. For the current date (or appointment date less than three days in future), the clinic schedule displays the default, the current date. For future dates, the clinic schedule displays -/+ three days of the appointment date.
4. Select an appointment from the Clinic Schedule Grid.

5. Right-click and select **Cancel**.

![Appointment Right-click Options – Cancel Appointment](image)

**Figure 127: Appointment Right-click Options – Cancel Appointment**

6. In the **Cancel Appointment** dialog box, select a cancellation option:
   - **Cancelled by Clinic**: The original CID/Preferred appointment date defaults to the patient desired date. The date cannot be edited.
   - **Cancelled by Patient**: The patient CID/Preferred date is available and defaults to original CID/Preferred date request. You can edit the date to change it.

7. Select the **Reason for Cancellation** from the list.
   - Edit the CID/Preferred dates if applicable.
   - Add Remarks as needed.

8. Click **OK**.

   The appointment is canceled and not rebooked. If the appointment is linked to a consult, the consult status changes to Active.
The Appointment displays in Pending Appointments with a status of Cancelled by Clinic or Cancelled by Patient (whichever is applicable).

**Figure 128: Cancel Appointment Dialog**

**Figure 129: Pending Appointment Window – Appointment Status Cancelled by Clinic**
Figure 130: Pending Appointment Window – Appointment Status Cancelled by Patient

- The Clinic Schedule closes.
- The patient’s appointment request reappears on the APPT Request grid for future rescheduling.

9. Select the APPT Request and the Clinic Schedule displays again.

Note: The Time Slot count increases when an appointment is canceled.

Figure 131: APPT Request – Time Slot Count Increase

6.2.3.1 Cancel directly from pending appointment box

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN. Click Search, and then select the requested patient’s name. Right click on a scheduled appointment from the Pending Appointment window in Ribbon bar.
3. In the Cancel Appointment dialog box, select cancellation the appropriate cancellation option **Cancelled by Clinic** or **Cancelled by Patient**. Select a Reason for cancellation from the list. Click OK.

4. **6.2.4 Mark as No Show Appointment**

   To record a no show appointment.
1. Log on to VS GUI as a Scheduler.

2. From the Tasks tab, type the patient’s last name and first name in the Search text box. Click **Search**, and then select the requested patient’s name from the list.

3. From the **Pending Appointment** Window select appointment to mark as no show.

   The clinic schedule displays.

   For past appointment dates, the Clinic Schedule displays the default, the appointment date. For the current date (or appointment date less than 3 days in future), the clinic schedule displays the current default date.

4. Select the appointment from the Clinic Schedule Grid.

5. Right-click the Appointment.

6. Select **Mark as No Show**. The appointment MUST be a past date/time from the current date/time.

   **Note:** “Mark as No Show” is not available for future appointments.

---

**Figure 134: Appointment Right-click Options – Mark as No Show**

The Mark as No Show dialog box displays.
7. Click **OK**.

The Appointment displays in red in the Clinic Schedule Grid and the Time Slot Viewer.

![Mark as No Show Dialog](image)

**Figure 135: Mark as No Show Dialog**

The Status in the Pending Appointment Window on the Ribbon Bar changes to No-Show.

The Request returns to the Request Management Grid for the patient.

![Clinic Schedule Display – No-Show Red](image)

**Figure 136: Clinic Schedule Display – No-Show Red**

The Status in the Pending Appointment Window changes to No-Show.

The Request returns to the Request Management Grid for the patient.

![Pending Appointment Window – Appointment Status No-Show](image)

**Figure 137: Pending Appointment Window – Appointment Status No-Show**
Inpatient appointments **CANNOT** be dispositioned as a No-Show. A Not Allowed warning message will display if the user attempts to flag an Inpatient as a No Show.

8. Click OK to close the message and the appointment should not show as a No-Show.

![Figure 138: No-Show Warning Message](image)

### 6.2.5 Undo No-Show Appointment

If a patient was previously recorded as a no-show but arrives in time for the current appointment, the previously recorded no show can be undone.

**To undo a no-show appointment:**

1. Log on to VS GUI as a Scheduler.
2. From the **Tasks** tab, in the **Search** text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click **Search**, and then select the requested patient’s name. Click **Search**.
3. In the Pending Appointments Window on the Ribbon Bar, point to the No Show appointment to be undone. The clinic schedule displays.
   - For past appointment dates, the clinic schedule displays the default appointment date.
   - For the current date (or appointment date less than 3 days in future), the clinic schedule displays the current default date.
4. Right-click Appointment.
5. Select Undo No-show.
In the Clinic Schedule Grid, the appointment changes from red to purple.

The appointment status in the Pending Appointments Window changes to No Action Taken.
Figure 141: Undo No-show – Appointment Status No Action Taken

The Request closes and is relinked to the appointment.

6.2.6 Checking In a Patient

If a clinic location uses VPS Vetlink and/or patient kiosks to check in patients, continue to use VPS Vetlink and kiosks to check in patients. VS GUI is an overlay to VistA, and like a VistA check in, a check in VS GUI will not reflect in Vetlink for patient tracking.

To check in a patient for an appointment:

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.
3. In the Pending Appointments Window on the Ribbon Bar, point to the appointment to be checked in.

The clinic schedule displays. For past appointment dates, the clinic schedule Clinic Schedule opens defaulted to appointment date. For the current date (or appointment date less than three days in future), the clinic schedule displays the current default date.

4. Right-click Appointment.
5. Select Check In Patient.

Note: Check In is not available for appointments with future dates.
The Appointment Check In dialog box opens. You can change the check in date and time as needed.

6. Click OK.

The appointment color changes to yellow, which indicates the patient has checked in for the appointment.
In the **Pending Appointment Window** on the Ribbon Bar, the appointment status changes to ACT REQ/CHECKED IN.

![Figure 144: Clinic Schedule Display – Check In Yellow](image)

6.2.7 **Undo a Patient Check In**

If a patient is checked in by mistake, the check in can be undone.

To undo a patient check in:

1. Log on to VS GUI as a Scheduler.
2. On the Clinic Schedule Grid, select the patient check in that needs to be undone.
3. Right-click and then select Undo **Check In Patient**.

![Figure 145: Pending Appointment Window – Status ACT REQ/CHECKED IN](image)
Figure 146: Appointment Right-click Options – Undo Check In Patient
The Appointment changes color from yellow to purple.

Figure 147: Clinic Schedule Display – Undo Check In Patient Purple

On the Pending Appointment Window, appointment status changes to No Action Taken.
6.2.8 Check Out a Patient

To check out a patient:

1. Requires the SD SUPERVISOR key in VistA. Please note: The check out follow-up function is now working in version 2.0.0.14, but is still tied to the encounter. Until we can make the VS GUI’s Check Out purely administrative, we highly discourage the use of Check Out in VS GUI.

2. Log on to VS GUI as a Scheduler.

3. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.

4. In the Pending Appointments Window on the Ribbon Bar, point to the appointment to be checked out.

The Clinic Schedule displays.

- For a past appointment date, the Clinic Schedule opens on the default appointment date.
- For the current date (or appointment date less than three days in future), the schedule displays the current default date.
- For future dates, the schedule displays +/- three days of the appointment date.

5. Right-click and select Check Out Patient.

Note: Check Out is not available to select if Check In has not been performed.
6. Update the Appointment Check Out dialog box.
7. Confirm the date and time. Edit as needed.
   Note: Check Out must be at least one minute after Check In.
8. Click OK.

The appointment status is changed to ACT REQ/Checked Out in the Pending Appointment Window and the color changes to orange in Clinic Schedule.

Note: When the Scheduler clicks OK, if Follow-up Needed was checked, then the new APPT Request dialog box opens. This APPT Request dialog box needs to be completed before Patient Check Out is complete.
Figure 150: Appointment Check Out Dialog

Figure 151: Clinic Schedule Display – Check Out Patient Orange

Figure 152: Pending Appointment Window – Status ACT REQ/CHECKED OUT
6.2.9 Undo a Patient Check Out

If a patient is checked out by mistake, the checkout can be undone.

To check out a patient:

1. Requires the SD SUPERVISOR key in VistA. **Please note: The Undo Check Out function is not working as designed and should not be used in this version.** It will remove any encounter information associated with this visit.

2. Log on to VS GUI as a Scheduler.

3. On the Clinic Schedule Grid, select the patient check in that needs to be undone.

4. Right-click and select **Undo Check Out Patient**.

![Figure 153: Appointment Right-click Options – Undo Check Out Patient](image)

The Appointment changes color from orange to yellow.

![Figure 154: Clinic Schedule Display – Undo Check Out Patient Yellow](image)
From the Pending Appointment Window, the appointment status changes to ACT REQ/CHECKED IN.

![Pending Appointment Window – Status ACT REQ/CHECKED IN](image)

**Note:** Undoing the checkout will also delete all the unnecessary information that has been entered up to this point.

### 6.2.10 Rescheduling an Appointment

You can cancel an appointment and reschedule it for another time.

1. Log on to VS GUI as a Scheduler.
2. From the Tasks tab, in the **Search** text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click **Search**, and then select the requested patient’s name.
3. In the **Pending Appointments** Window on the Ribbon Bar, point to and select the appointment to be rescheduled.

   The Clinic Schedule displays.

   For a past appointment date, the Clinic Schedule opens to the default appointment date.

   For the current date (or appointment date less than three days in the future), the schedule displays the current default date.

   For future dates, the schedule displays -/+ three days of an appointment date.

4. On the Clinic Schedule Grid, select the scheduled appointment, and cancel per section 6.2.3 Cancelling An Appointment.

5. Add the new appointment per section 6.1 Adding Appointments.

   The box opens.

6. Click OK to move the appointment or click cancel if you do not want to move the appointment.
6.3 Multiple Appointment Requests and Appointments

Multiple Appointment Requests allow the scheduler to create requests and book a series of appointments at one time for a patient.

6.3.1 Multiple Appointment Request

1. Log into VS GUI as a Scheduler.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name. Click Search.

3. In the Request Type dialog box, select APPT to create a new request.

The Patient’s Eligibility Information dialog box opens.

4. In the Appointment Request dialog box confirm Patient Information details and complete the Request Information section.

   - Select the Clinic or Service/Specialty button. For Clinic, enter the name of the clinic (minimum of six characters required). For Service/Specialty, enter the service or specialty (minimum of six characters required).
   - Enter the CID/Preferred Date for the preferred appointment date. The scheduler can enter the date directly or select the date from the Calendar control option.
   - Select the Appointment Type (if not defaulted by patient eligibility and clinic selection) then choose from the list.
   - In Request By, select either Provider or Patient.
   - For you select Provider, enter the provider’s name (three character minimum) and select from list. If you select Patient, then the Provider field is dimmed and you cannot be edit that field.
   - The Status is automatically populated.
     a. Established – This indicates that the patient has been seen at that clinic in the past 24 months
     b. New – This indicates that the patient has not been seen at that clinic in the past 24 months

   The Multiple Appointments Required check box is enabled.

5. Click the box to enter a check mark.

   - The Number of Appointments Required list is visible. Up to 60 appointments can be requested at one time.
   - The Interval Between Appointments (In days) list is visible. Up to 30 days between appointments can be requested at one time.

Note: The combination of Number of Appointments Required and Interval Between Appointments cannot exceed 24 months. If the selected combination exceeds 24 months to complete, when the scheduler selects OK to complete the
Appointment Request, the MRTC Interval/Appt.# Dialog displays the message: “The combination of requested appointments and the interval between appointments exceeds 24 months. Adjust the number of requested appointments and/or the interval between appointments so that the combined duration is less than 24 months.” The adjustment must be made before the Multiple Appointment Request can be completed.

![Figure 156: MRTC Interval/Appt. # Dialog](image)

- Text can be added in the Comment field up to 80 characters to add information regarding the Appointment Request. For MRTC Requests, the text displays in the Request Management Grid under the Comment column after the {Day, Interval} information.
- Only the current comment entered is displayed although there is an Audit Log of Uses that created previous comments.

6. **Click OK.**

The Find Appointment dialog box opens to allow the scheduler to book Multiple Appointments at one time. See Section 0 for booking appointments from the Find Appointment Dialog.

### 6.3.1.1 Note Regarding Parent and Child Appointment Requests

When booking Multiple Appointment Requests, the scheduler can click Close in the Find Appointment dialog. If this is done prior to the first appointment in the series being booked the Parent MRTC Request is placed in the Request Grid with a “P” and a check mark in MRTC Column. The {Day, Interval} requested in the Appointment Request displays in the Comment column. Any text entered into the Comment field of the Appointment Request dialog displays in the Comment column after the {Day, Interval} information. The MRTC APPT Requests with Comments are flagged with a red arrow in the Request Management Grid.

If the scheduler books the first appointment in the series and then clicks CLOSE in the Find Appointment Dialog box, the Parent Request displays in the Request Grid. Additionally, the remaining unbooked appointments display as individual Child MRTC Requests in the Request Grid with a check mark, not a “P” in the MRTC Column. The appointment placement in the series as well as the number of total appointments requested display in the
Comments column. Any comments entered in the original MRTC Appointment Request dialog box display in each individual Child Request after the {Day, Interval} information.

Selecting the Parent MRTC Request launches the **Find Appointment** dialog box and the scheduler can continue booking all remaining appointments for the series from Find Appointment. However, selecting a Child MRTC Request opens the Clinic Schedule and the scheduler can only book the individual appointment following the same steps as adding an appointment for an APPT Request (refer to Section 6.1.1). The Parent MRTC Request is not removed from the Request Grid until all appointments in the series have been booked. A Child MRTC Request is removed from the Request Grid at the time the appointment is booked.

![Figure 157: MRTC Requests displayed in Request Management Grid](image)

### 6.3.2 Adding Multiple Appointments from Find Appointment Dialog

When the scheduler clicks **OK** in the Appointment Request Dialog with **Multiple Appointments Required** checked, the **Find Appointment** dialog box displays to allow the scheduler to book Multiple Appointments at one time.

In the Find Appointment dialog box, the following information is displayed:

- **Calendar** in upper left corner. The CID/Preferred date entered in Appointment Request is highlighted.
- The **Clinic** is the default on the list from the Appointment Request in the Resources Section in the upper middle pane of the Find Appointment dialog box. This field is editable and Clinics can be switched between appointments as needed.
- Patient’s **Time of Day** and **Day of Week** preferences are the default in the upper right pane of the Find Appointment dialog box. These can be edited/adjusted as needed.
- The CID/Preferred date entered in Appointment Request is displayed under the Time of Day and Day of Week preferences in the Find Appointment dialog box with the label **Original CID**: This data is not editable.
- **Search** is available if the availability needs to be recalculated due to date or clinic changes.
• **The Multiple Appointments Required** information is the default from the Appointment Request in the middle of the Find Appointment dialog box. This information is not editable.

• **CID** displays a list of unbooked appointment dates. These dates are calculated based upon the original CID/Preferred Date + the Number of Appointments + the Interval Between Appointments.

• For clinics with special instructions defined, **Special Instructions** displays in the Search Results section of the Find Appointment dialog box. When clicked, a Special Instructions dialog box displays with the defined information available to review.

• The clinic’s **appointment length, variable length, and Max Overbook** settings display in the label in the Search Results section.

In the **Search Results** section, availability results display -/+ three Days of the CID date for future dates. For current CID dates availability display Day 1 + six days in Search Results field.

**Note:** Time of Day and Day of Week preferences limit availability results.

• **Book Column** allows the scheduler to select the time slot for booking an appointment.

• **Start Time Column** displays the start time of time slot.

• **End Time Column** displays the end time of time slot.

• **Resource Column** displays the name of the Clinic currently selected.

• **Slots Column** displays available time slot count. Slots available for overbooking display based upon the Scheduler’s security key allowances.

**Note:** Time Slots do not display if no availability is defined for that time period for the clinic or overbooking has been reached beyond the scheduler’s security key allowances.

• **Number of Available Slots**: The count displays at the bottom of the Find Appointment dialog box notifying the scheduler how many slots are available for the selected CID date.

• **Next** and **Book** buttons are disabled until first Time Slot(s) is selected for booking.

  1. Select a time slot in the Booking Column. If the clinic is Variable Length, schedulers can select multiple appointment slots in the view to lengthen the appointment time. The additional slots must all be adjacent to each other (stop time of first = start time of second).

**Note:** If Clinic DISPLAY INCREMENTS PER HOUR is defined for a count less than the defined LENGTH OF APPT, then multiple Time Slots may need to be selected to satisfy the Appointment Booking Requirements and enable the Book Button.

  2. **Click Book.**

**Note:** If the selected time slot has reached its defined slot count and the scheduler has the appropriate security keys to overbook, then a dialog box displays a message
alerting the scheduler that continuing with scheduling the appointment will result in overbooking the selected time slot. The Scheduler can click OK to confirm overbooking and continue to the New Appointment dialog box.

The New Appointment dialog box opens. The New Appointment dialog box has one tab:

- **Appointments Tab**:
  - Patient Information Section displays Name, DOB, SSN, SVC Connected, SC Percent, GAF (read only), and Svc Related check box.
  - Appointment information section displays Start Time, Appt Type, Duration, Clinic and Notes (Appointment Start Time; Duration on for appointments to VL Clinics; and Notes are editable fields).
  - Appointment Conflicts section displays any appointments already scheduled that conflict with the appointment being added.

3. Confirm information in the New Appointment dialog box and add any applicable text to the Notes section. Click **OK**.

The Print Letter? Dialog box displays.

4. Click **OK** to Print the Patient Letter.

5. Click **Cancel** to close dialog box and not print the Patient Letter.

The Closing Request dialog box displays “This request will be closed.”
6. Click **OK**.

The First MRTC Appointment is booked. The CID date in the Find Appointment dialog box changes to the next appointment date in the series. The MRTC Booking Status dialog box displays appointments as they are booked. An arrow points to date in MRTC Series that is being booked and automatically updates as appointments are completed.

The following information displays in the MRTC Booking Status dialog box:

- CID Date—Calculated by first booked appointment date and Interval Requested.
- Appointment Date—the date selected when booking appointments.
- Resource—the Clinic name where the appointment was booked.

---

![Figure 159: Find Appointment Dialog and MRTC Booking Status Dialog](image)

To book a second MRTC appointment:

1. Select a time slot for the second MRTC appointment in the series.
2. Click **Book**.

The New Appointment dialog box displays.

3. Confirm information in the New Appointment dialog box. Add any applicable text to the Notes section, and then click **OK**.

The Print Letter? Dialog box displays.
4. Click **OK** to Print the Patient letter.

Click **Cancel** to close dialog and not print the Patient Letter.
The Closing Request dialog box displays a message “This request will be closed.”

5. Click **OK**.

The Second MRTC Appointment is booked. The CID date in the Find Appointment dialog box changes to the next appointment date in the series. The Appointment date is added in the MRTC Booking Status dialog box for the second appointment and the arrow moves to the next appointment (if applicable).

Once all MRTC Appointments have been booked for the series, the Closing Request dialog displays, “The Parent MRTC Request will be closed.”

If a clinic has a future inactive date and the CID date falls + three days after the Inactivate Date, a gray label displays in the Search Results section of the Find Appointment dialog box, “There are no slots available. The selected Clinic will be deactivated on {Inactivation Date}. Select another clinic, and then click **Search** to complete the MRTC request.”

To complete adding appointments for the series, the scheduler needs to change to an appropriate clinic in the Resources section with availability and continue adding appointments for the remainder of the series requests.

---

**Figure 160: Future Clinic Inactivation Date**
6.4 Overbooking Appointments

Schedulers can overbook appointments based upon the following rules:

- The scheduler must have the Scheduling Overbook (SDOB) security key to overbook up to the clinic’s Maximum (Max) Overbook (OB) definition. Schedulers must have the Scheduling Master Overbook security key (SDMOB) security key to schedule beyond the clinic’s Max OB definition. Schedulers with both overbook security keys can overbook on any day that has availability defined regardless of the clinic’s Max OB definition. Schedulers cannot overbook if they are not assigned an overbooking security key.
- The Clinic must have availability defined for the day in question. If there is no availability defined, then schedulers will not be able to overbook appointments on that day regardless of the security key assigned to them.
- Appointments cannot be overbooked prior to the start of the day’s clinic availability.

6.4.1 Overbooking Appointments with SDMOB Security Key

Schedulers assigned the SDMOB security key can overbook anytime outside of the clinic’s availability from the clinic’s start time to 11:59 p.m. even if the Max Overbook Limit defined for a clinic has been reached.

To overbook an appointment with the SDMOB security key:

1. Log into VS GUI as a Scheduler.
2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and select the requested patient’s name. Click Search.
3. In the Request Type dialog box, select APPT, and then click OK to create a new request or click Cancel for the existing request.

Note: Refer to Section 5.1.2 Adding Appointment Request for steps on adding a new APPT Request.

4. In the Request Management Grid select the APPT request.

The Clinic Schedule Grid displays the clinic’s schedule based upon the CID/Preferred date of request. For past dates, the clinic schedule opens to the default CID/Preferred date.
date as Day 1 + six days. For the current date (or the CID/Preferred date less than three days in the future), the clinic schedule displays the current default date as Day 1 + six Days. For future dates, the clinic schedule displays +/- three days of CID/Preferred date.

Figure 162: Clinic Schedule Display – APPT Request Future CID/Preferred Date

Note: For a newly created APPT request, the system automatically highlights the APPT request and the Clinic Schedule displays.

In the Clinic Schedule Grid, select the time slot in gray that is within the clinic’s hours, from the clinic’s start time to 11:59, or a date/time slot that has existing overbookings.

Note: The Clinic Max Overbook limit displays in the Clinic Day Event notes.

Figure 163: Max Overbook Limit

5. Right-click in the time slot.

The Add Appointment option displays.
Note: The Create Walk In Appointment option is only available for selection on the current date. It is not available for past or future CID/Preferred dates.

Note: Right-click options do not display if the selected time slot is for a day that has no availability defined or is prior to the clinic’s start time.

Figure 164: Appointment Right-click Options – Add Appointment

   The Overbook message displays.
7. Click OK.

The View Appointment dialog box displays as well as the Patient Eligibility dialog box.

- **The Appointments Tab:**
  - Patient Information Section displays Name, DOB, SSN, SVC Connected, SC Percent, GAF (read only), and Svc Related check box.
  - Appointment information section displays Start Time, Appt Type, Duration, Clinic and Notes (Appointment Start Time; Duration on for appointments to VL Clinics; and Notes are editable fields).
  - Appointment Conflicts section displays any appointments already scheduled that conflict with an appointment being added.
8. Add any applicable Notes to the appointment. Click **OK**.

   The Print Letter? Dialog displays.

9. Click **OK** to print the Letter to the patient.

   Click **Cancel** to not print letter.

![Figure 165: View Appointment Dialog – Appointments](image)

The Closing Request dialog box opens.

10. Click **OK**.

![Figure 166: Print Letter? Dialog](image)
The APPT Request is removed from the Patient Request Management Grid.
The Next request for the patient is moved up and highlighted.
The Clinic Schedule closes.
The New appointment displays in the Pending Appointment Window on the Ribbon Bar.

11. Select an appointment from the Pending Appointment window to view it in the Clinic Schedule Grid.

• The clinic schedule opens.
• For past dates, the clinic schedule opens to the default appointment date.
• For the current date (or appointment date less than three days in future), the clinic schedule defaults to the current date.
• For future dates, the clinic schedule displays -/+ three days of the appointment date.
• The Overbook count increases in the Clinic Schedule time slot and in the Time Slot Viewer. If the appointment count has filled the time slot, hover over the window to show the slot count.

6.4.2 Overbooking Appointments with SDOB Security Key

Schedulers who are assigned the SDOB security key can overbook outside of the clinic’s availability from the clinic start time to 11:59 p.m. Schedulers cannot overbook past the Max Overbook Limit defined for a clinic.
To overbook an appointment with the SDOB security key:

1. Log into VS GUI as a scheduler.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name. Click Search.

3. If creating a new request, click the New Req button in the Actions pane of the ribbon bar. In the Request Type dialog box, select APPT and then click OK to create a new request.

Note: Refer to Section 5.1.2 Adding Appointment Request for steps on adding new APPT Request.

4. Select APPT request in the Request Management Grid.

The Clinic Schedule Grid displays the clinic’s schedule based upon the CID/Preferred date of request. For a past date, the clinic’s schedule opens to the default CID/Preferred date as Day 1 + six days. For a current date (or CID/Preferred date less than three days in future), the clinic’s schedule displays the current default date as Day 1 + six days. For future dates, the clinic schedule displays +/- three days of CID/Preferred date.

Note: For a newly created APPT request the system automatically highlights the APPT request and the Clinic Schedule displays.
5. In the Clinic Schedule Grid, select the time slot colored in teal that is within the clinic’s hours, close of clinic hours to 11:59 p.m., or a date that does not already have existing overbooks. 

**Note:** The Clinic Max Overbook limit displays in the Clinic Day Event notes.

6. Right-click the time slot.

The Add Appointment option displays. The Create Walk In Appointment option is only available for selection on the current date. It is not available for past or future CID/Preferred dates.

**Note:** Right-click options do not display if the selected time slot is for a day that has no availability defined, is prior to the clinic’s start time, or the Max Overbook limit has been met for the day.
7. Select Add Appointment.

The Overbook message displays.

8. Click OK.

The New Appointment dialog box displays, as well as the Patient Eligibility dialog box.

- **Appointments Tab:**
  - **Patient Information Section** displays Name, DOB, SSN, SVC Connected, SC Percent, GAF (read only), and Svc Related check box.
  - **Appointment** information section displays Start Time, Appt Type, Duration, Clinic and Notes (Appointment Start Time; Duration on for appointments to VL Clinics; and Notes are editable fields).
  - **Appointment Conflicts** section displays any appointments already scheduled that conflict with the appointment being added.
9. Add any applicable Notes to the appointment. Click **OK**.

The Print Letter? Dialog box displays.

10. Click **OK** to print the Patient Letter.

11. Click **Cancel** to exit the dialog box and not print the Patient Letter.

![Figure 174: New Appointment Dialog](image)

**Figure 174: New Appointment Dialog**

9. Add any applicable Notes to the appointment. Click **OK**.

The Print Letter? Dialog box displays.

10. Click **OK** to print the Patient Letter.

11. Click **Cancel** to exit the dialog box and not print the Patient Letter.

![Figure 175: Print Letter? Dialog](image)

**Figure 175: Print Letter? Dialog**

The Closing Request dialog box opens.

12. Click **OK**.

![Figure 176: Closing Request Dialog](image)

**Figure 176: Closing Request Dialog**
The APPT Request is removed from the Patient Request Management Grid. The Next request for the patient is moved up and highlighted.

The Clinic Schedule closes.

The New appointment displays in the Pending Appointment window in Ribbon Bar.

13. Select an appointment from the Pending Appointment window to view it in the Clinic Schedule Grid.

The clinic schedule opens. For past dates, the clinic schedule opens to the default appointment date. For the current date (or appointment date less than three days in future), the clinic schedule displays the current default date. For future dates, the clinic schedule displays +/- three days of appointment date.

The Overbook count increases in the clinic schedule time slot and in the Time Slot Viewer. If the appointment count has filled the time slot, hover over the window to display the slot count.

**Figure 177: Clinic Schedule Display – Overbook Appointment After Hours**

### 6.5 Variable Length (VL) APPT

Scheduling appointments can typically be done in fixed length intervals based upon the clinic’s definitions. However, a clinic can be setup as a Variable Length (VL) clinic, which allows a user to schedule an appointment for an extended amount of time as needed rather than scheduling multiple appointments.

#### 6.5.1 Identifying a VL Clinic:

To identify if a clinic is set up for VL scheduling:

1. Log on to VS GUI.

2. From the Clinic Schedules, type the clinic’s name (six-character minimum) or the clinic’s abbreviation (four-character minimum).
Figure 178: Clinic Schedules – Clinic Search

The selected clinic’s schedule displays the default, the current date as Day 1 + six days.

Figure 179: Clinic Schedule Grid

To confirm whether VL appointments can be booked at a clinic, view the All Day Event Bar in the Clinic Schedule Grid. The clinic’s defined appointment length and max overbooking limit are displayed. If the clinic is designated as a variable length clinic, the letters “VL” display before the appointment length.

Figure 180: VL Indicator
6.5.2 Add a VL APPT

To add a VL APPT:

1. In the clinic schedule, select the time slot that the APPT shall begin.
2. Highlight consecutive time slots and select **Add Appointment**

![Figure 181: Consecutive Time Slots](image)

3. Right-click and select **Add Appointment**.
   
The New Appointment dialog box displays.
4. The New Appointment dialog box appears. Confirm that the appointment duration reflects the correct amount of time.

5. Click OK.

   The Print Letter? Dialog box opens.

6. Print the letter if appropriate. Click cancel, if you do not want to print the letter.

   The Closing Request dialog box displays a message “This request will be closed”.

7. Click OK.

   The New APPT displays in the Pending Appointment window.

8. Select the APPT from the Pending Appointment window.
The Clinic Schedule displays the booked APPT spanning three time slots, which indicates a VL APPT.

![Clinic Schedule Display – Appointment Length Extended](image)

**Figure 183: Clinic Schedule Display – Appointment Length Extended**

### 6.6 Compensation and Pension (C&P) APPTs

#### 6.6.1 Add a C&P APPT Request

1. Log into VS GUI.
2. From the Tasks tab, type the patient’s last name and the first name in the Search text box. Click **Search**, and then select the requested patient’s name from the list.
3. Click the **New Req** button in the Actions pane.
4. Select the APPT Request Type.
5. Complete the APPT Request dialog box.
   
   Refer to **Section 5.1.2** for instructions on completing APPT Request dialog.
6. Select the appropriate Clinic for the C&P appointment.
7. Enter the CID/Preferred Date.
8. In Appointment Type list, select C&P.
9. Click OK.

The APPT Request displays on the patient’s Request Management Grid.

6.6.2 Add a C&P APPT for Pending 2507 Request NOT Previously Linked to Appointment

1. Log into VS GUI.

2. From the Tasks tab, in the Search text box, type the patient’s last name or the patient’s first initial of last name and last four of the SSN (e.g. S1234). Click Search, and then select the requested patient’s name.

3. In the Request Management Grid, select pending C&P APPT Request.

4. In the Clinic Schedule Grid, click the open time slot.

5. Right-click, and then select Add Appointment

Note: The Create Walk-In Option is available if the current day is selected in the Clinic Schedule.

The New Appointment dialog box displays.

Confirm the Appointment Type is listed as C&P. If not, select the Appointment Type from the list.

Add any applicable APPT information to the Notes section.

6. Click OK.

The Dialog box displays:

![Figure 184: TRACKING Record Updated]

Note: If the patient did NOT have a pending 2507 Request on file a dialog box opens:
7. Click **OK**.
   The Print Letter? Dialog box displays.
8. Click **OK** to print the Patient Letter.
   Click **Cancel** to exit the dialog box and not print the patient letter.
   The Closing Request Dialog box displays a message - “This request will be closed.”
9. Click **OK**.
   The New C&P APPT displays in the Pending Appointment window and the Automated Medical Information Exchange (AMIE) Tracking Link is updated.

### 6.6.3 Add a C&P APPT for Pending 2507 Request Already Linked to APPT NOT Due to Cancellation

1. Log into VS GUI.
2. From the Tasks tab, type the patient’s last name and the first name in the Search text box. Click **Search**, and then select the patient’s name with the pending C&P APPT Request from the list.
3. In the Request Management Grid, select pending C&P APPT Request.
4. In the Clinic Schedule Grid click an open time slot.
5. Right-click on open time slot, and then select **Add Appointment**.
   **Note:** The Create Walk-In Option is available if the current day is selected in the Clinic Schedule.
   The New Appointment dialog box opens.
6. Confirm the Appointment Type is listed as C&P. If not, select it from the list.
7. Click **OK**.
   The C&P requests dialog box displays the following information:
   - Name: Veteran’s name
   - Request Date: Date 2507 Request created
8. Select the appropriate 2507 Request from the list.

9. Click **OK**.

The C&P Request dialog box displays an option to select Yes or No:

![Figure 187: C&P Request Due to Cancellation Dialog](image)

10. Click **No**.

A message update dialog box displays:

![Figure 188: AMIE C&P EXAM TRACKING Record Updated](image)

11. Click **OK**.
The Print Letter? Dialog box opens.

12. Click **OK** to print the Patient Letter.

Click **Cancel** to exit the dialog box and not print the Patient Letter.

The Closing Request dialog box displays the message: “This request will be closed.”

The New C&P Appointment displays in the Pending Appointment window, and shows the AMIE Tracking Link is updated.

### 6.6.4 Add a C&P APPT for Pending 2507 Request due to Clinic Cancellation

1. Log into VS GUI.

2. From the **Tasks** tab, in the **Search** text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click **Search**, and then select the requested patient’s name. Click **Search**.

3. In the Request Management Grid, select pending C&P APPT Request.

4. In the Clinic Schedule Grid, click the open time slot.

5. Right-click the time slot, and then select Add Appointment.

**Note:** The Create Walk-In Option is available if the current day is selected in the Clinic Schedule.

The New Appointment dialog box opens.

Confirm the Appointment Type is listed as C&P. If not, select the Appointment Type from the list.

6. Click **OK**.

The C&P Requests dialog box displays the following information:

- **Name:** Veteran’s name
- **Request Date:** Date 2507 Request created
7. Select the appropriate 2507 Request from the list.
8. Click **OK**.

The C&P Request displays the option to select Yes or No:

![Figure 190: C&P Request Due to Cancellation Dialog](image)

7. Click **Yes**.

The C&P APPT Links dialog box displays the following information:

- Initial Appointment Date
- Clock Stop Appointment Date
- Current Appointment Date
- Clinic Name
10. Click **OK**.

**Note:** If the scheduler clicks **Cancel**, the following dialog box opens:

![C&P APPT Links Due to Veteran Cancellation or No Show](image)

You have not selected the linked appointment being rescheduled. You may need to adjust the link to the appointment with the AMIE link management option to ensure proper processing time calculation for this 2507.

11. Click **No**.
A Dialog box displays a message about the C&P appointment.

![Image](image.png)

**Figure 194: C&P APPT Links Adjustment Dialog**

12. Click **OK**.
   
The Print Letter? Dialog opens.

13. Click **OK** to print the Patient Letter.
   
   Click **Cancel** to exit the dialog box and not print the Patient Letter.

The Closing Request dialog box displays a message: “This request will be closed.”

The New C&P APPT displays in the Pending Appointment window and shows the AMIE Tracking Link is updated.

**Note:** The previous appointment linked to the 2507 Request must be manually dispositioned.

### 6.6.5 Add C&P APPT for Pending 2507 Request due to Veteran Cancellation/No Show

1. Log into VS GUI.

2. From the **Tasks** tab, in the **Search** text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click **Search**, and then select the requested patient’s name. Click **Search**.

3. In the Request Management Grid, select pending C&P APPT Request.

4. In the Clinic Schedule Grid, click an open time slot.

5. Right-click the time slot, and then select **Add Appointment**.

**Note:** The Create Walk-In Option is available if the current day is selected in the Clinic Schedule.

The New Appointment dialog box opens.

6. Confirm the Appointment Type is listed as C&P. If not, select the Appointment Type from the list, and then click **OK**.

The C&P Requests dialog box displays the following information:

- Name: Veteran name
- Request Date: Date 2507 Request created
7. Select the appropriate 2507 Request from the list.

8. Click **OK**.

The C&P Request dialog box displays information about the appointment and the option to select Yes or No:

![Figure 195: C&P Requests Dialog](image)

9. Click **Yes**.

The Comp & Pension Appointment Links dialog box displays the following information:

- Initial Appointment Date
- Clock Stop Appointment Date
- Current Appointment Date
- Clinic Name

![Figure 196: C&P Request Due to Cancellation Dialog](image)
10. Click **OK**.

**Note:** If the scheduler clicks **Cancel** instead of **OK**, the following message displays:

![Figure 198: C&P Canceled APPT Links Dialog Warning](image)

You have not selected the linked appointment being rescheduled. You may need to adjust the link to the appointment with the AMIE link management option to ensure proper processing time calculation for this 2507.

![Figure 199: C&P APPT Links Due to Veteran Cancellation or No Show](image)

**Figure 199: C&P APPT Links Due to Veteran Cancellation or No Show**

11. Click **Yes**.

A message update dialog box displays:
12. Click **OK**.

The Print Letter? Dialog box displays.

13. Click **OK** to print the Patient Letter.

Click **Cancel** to exit the dialog box and not print the Patient Letter.

The Closing Request dialog box displays a message: “This request will be closed.”

The New C&P APPT displays in the Pending Appointment window and Shows the AMIE Tracking Link is updated.

**Note:** The previous appointment linked to the 2507 Request must be manually dispositioned.

### 6.6.6 Disposition APPT Linked to Pending 2507 Request

1. Log into VS GUI.

2. From the **Tasks** tab, in the **Search** text box, type the patient’s last name or the patient’s first initial of the last name and last four of the SSN (e.g. S1234). Click **Search**, and then select the requested patient’s name. Click **Search**.

3. In the Pending Appointment window, select the pending C&P APPT linked to the pending 2507 Request.

4. In the Clinic Schedule Grid, click the appointment.

5. Right-click the appointment and the following options are available to select:
   - Edit Appointment
   - View Appointment
   - Cancel Appointment


The Cancel Appointment dialog box displays. See Section 0 for detailed instructions on completing the Cancel Appointment dialog.

7. Select Appointment Cancelled By.

8. Select Reason for Cancellation.

Edit CID/Preferred Date if applicable.

9. Enter Remarks.
10. Click **OK**.

A Dialog box displays an update message:

![Dialog box](image)

**Figure 201: C&P Cancel APPT Associated 2507 Request Updated**

**Note:** If the C&P APPT was NOT linked to the 2507 request, the following message displays in dialog box:

![Dialog box](image)

**Figure 202: C&P Cancel APPT NOT Linked to Pending 2507 Request**

11. Click **OK**.

The APPT status is updated in the Pending Appointment window. The APPT is removed from the Clinic Schedule and the AMIE Link is updated.

### 6.7 VA Online Scheduling (formerly VAR)

**Note:** Note: VA Online Scheduling requests will NOT be processed in VS GUI at this time due to a number of enhancements that will be added at a later date. The SDECZREQUEST key is held in reserve until that time. If a user has the key on their VistA account now, it will give them an error each time they log in as the service cannot connect to the mobile request service.

VA Online Scheduling requests will eventually interface with VS GUI requests, including:

- Schedule an appointment requested in VA Online Scheduling through the VS GUI interface, fulfilling that request.
- View appointment requests within the GUI.
- Communicate or message the Veteran from within the GUI up to a limit of four times.
- Close out requests from within the GUI.
7 Clinics

7.1 Tasks Tab

7.1.1 Viewing Clinic Schedule Availability

The VS GUI displays a consistent color visual indicator for a clinic’s workable hours including bookable holidays, non-workable hours including non-bookable holiday, clinic cancellation, and no availability as follows:

Table 1: Clinic Schedule Availability

<table>
<thead>
<tr>
<th>Appointment Availability Type</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available Slots/Hours of Operation</td>
<td>White</td>
</tr>
<tr>
<td>Unavailable/ Non-workable hours during day with availability defined (i.e. clinic lunch breaks).</td>
<td>Teal</td>
</tr>
<tr>
<td>Cancelled Availability for Clinic—Partial and All Day Cancellation.</td>
<td>Teal + hash mark ()</td>
</tr>
<tr>
<td>Holiday but bookable</td>
<td>White</td>
</tr>
<tr>
<td>Holiday but NOT bookable</td>
<td>Gray</td>
</tr>
<tr>
<td>No availability defined for day (i.e. Saturday or Sunday).</td>
<td>Gray</td>
</tr>
<tr>
<td>No availability defined for the clinic</td>
<td>Gray</td>
</tr>
</tbody>
</table>

To search for a clinic and view the clinic schedule:

1. From the Tasks tab, on the Clinic Schedules, enter a partial name of a clinic (six character minimum).
2. Select the desired clinic from the returned list. The selected clinic schedule displays.
Figure 205: Clinic Schedules Display – Hours of Operation

Figure 206: Clinic Schedules Display – Holiday Bookable
7.1.2 Viewing Clinic's Availability Cancellation

The Clinic Schedule displays full or partial day cancellation in gray + \ over the cancelled time slots.

Figure 207: Clinic Schedules Display – Holiday Unbookable

Figure 208: Clinic Schedule Display – No Availability Defined

Figure 209: Clinic Schedule Display – Whole and Partial Day Cancel Availability
7.1.3 Viewing the Clinic’s Length of APPT and Max OB

A label in the All Day Event Bar displays the Length of APP and Max OB values defined for the selected clinic.

![Figure 210: APPT Length and Max OB Allowed](image)

7.1.4 Viewing the Clinic’s VL Indicator

For clinics defined as Variable Length, a flag “VL” displays before the Length of Appointment information in the All Day Event Bar in the Clinic Schedule Grid.

Note: Refer to Section 6.5.2 on How to Add VL APPT.

![Figure 211: VL Indicator](image)

7.1.5 Viewing the Clinic’s Special Instructions

To display a clinic’s special instructions:

1. From the Tasks tab, on the Clinic Schedules, enter a partial name of a clinic (six characters minimum).
2. Select the desired clinic from the returned list.
   
   The selected clinic schedule displays and the Special Instruction Indicator displays in the All Day Event Bar in the Clinic Schedule.
3. Click the Special Instructions indicator to display the Special Instructions.
7.1.6 Viewing Clinic’s Available Slots

The Time Slot Count for availability displays as follows:

- 0-9 and j-z – denote available slots where j=10, k=11… z=26.
- Upper Case Letters A-W denote overbooks, with A being the first slot to be overbooked and B being the second for that same time, etc.
- Special characters *, $, !, @, # denote overbooks or appointments that fall outside of a clinic’s regular hours.
7.1.7 The Time Slot Viewer

The Time Slot Viewer displays to the left of the Clinic Schedule Grid. It displays APPT information per selected time slot. For APPTs booked in the time slot, the full patient’s name displays in a list in the order they were added to the time slot.

1. From the Tasks Tab, on the Clinic Schedules, enter a partial name of a clinic (six-character minimum).

2. Select the desired clinic from the returned list.
   The selected clinic schedule displays.

   **Note:** Time Slot Viewer can be expanded or minimized in Clinic Schedule Grid.
When you select a time slot from the Clinic Schedule it populates the Time Slot Viewer with the following information:

- Date/Time of the Time Slot.
- Available slot count left for the time slot.
- A list of patient names in the order they were booked, for any APPTs scheduled in the time slot.
For booked APPTs, right-click to extend action options that are available from Time Slot Viewer, the same as in the Clinic Schedule Grid.

Figure 218: Time Slot Viewer Right-click–Edit, View, Cancel
The Check In Patient command from the Time Slot Viewer is the same as from the Clinic Schedule Grid.

![Figure 219: Time Slot Viewer – Check In Patient](image)

The Check Out Patient command from the Time Slot Viewer is the same as from the Clinic Schedule Grid.

![Figure 220: Time Slot Viewer – Check Out Patient](image)

The Mark as No Show command from the Time Slot Viewer is the same as from the Clinic Schedule Grid.
7.1.8 Viewing Provider Availability

To search for a provider and view the provider’s schedule.

1. From the Tasks tab, under the Request grid calendar, select Provider Schedules.
2. Enter a partial name of a provider (three characters minimum). Select the desired provider from the returned list.

**Figure 223: Provider Schedules Selection List**
The selected provider schedule displays.

**Figure 224: Provider Schedule Display**
The provider’s availability displays across all clinics. If the provider has only one clinic, that clinic’s schedule and availability appear.

**Figure 225: Provider Schedules Booked APPTs**
Available APPT slots display as white space, which a scheduler can select to add an APPT.
The APPTs display with the name of the patient in a specific Clinic Schedule time slot.
Time slots in the Clinic Schedule that appear dimmed indicate they are not available therefore, schedulers are unable to add APPTs for those specific slots.
Note: Refer to Section 6 for APPT Management instructions on how to Add, Check-In, Checkout, and Cancel APPTs.

7.1.9 Viewing Clinic Group Availability

To search for a clinic group and view the clinic group’s schedule:

1. On the Tasks tab, point to the calendar of the Request grid, and then select Clinic Groups.

2. Enter a partial name of a clinic group (six-character minimum).

3. Select the desired Clinic Group from the returned list.

Figure 226: Clinic Groups

Figure 227: Clinic Groups Search Result List
The selected clinic group schedule(s) displays, starting with today’s date in the Day view.

![Clinic Groups Schedule Display](image)

**Figure 228: Clinic Groups Schedule Display**

*Note:* Refer to Section 6 for the APPTs Management instructions on how to Add, Check-In, Checkout, and Cancel APPTs.

### 7.2 System Tab

The System tab requires the SDECZMGR security key to access the tab.

#### 7.2.1 Viewing Clinic Availability Information

Clinic availability cannot be modified from the VS GUI.

**To quickly search for clinic availability:**

1. From the System tab, click Availability in the Resource Schedules section.
2. In the *Availability Selection* dialog box, type the desired clinic’s name.
3. Select the desired clinic and click **OK**.
Figure 229: Clinic Availability Search

- The Schedule displays for the selected clinic. Primary Provider, Overbook Limit, Inactive Date, and Reactive Date, as applicable, also display in the Selected Clinic section.
- The Schedule also displays the number of APPTs per slot and the number of slots total per APPT length (in minutes and total number of bookable minutes).
- The Schedule uses the same visual coloration as the Clinic Schedule for workable hours, non-workable hours, and no availability.
7.2.2 Adding and Removing Privileged Users

7.2.2.1 Add A Privileged User

To add a privileged user to a prohibited clinic:

1. On the System tab, click **Scheduling Management**.
2. In the **Prohibited Clinic** search box, type a partial or full name of the clinic (minimum six characters).
3. Click **Find**.
   
   A list of prohibited clinics displays.
4. Select the appropriate prohibited clinic.
   
   A list of privileged users for the selected clinic displays.

5. Select a user from the Users pane on the left side of the open window, and then click **Add User**.
Figure 232: Add Privileged User

6. Click **OK** to add the user to the list of Privileged Users.

7. Please note: Only users with the VistA key SDECZMENU will show in the user list.

### 7.2.2.2 Remove Privileged User

**To remove a privileged user from a prohibited clinic:**

1. On the System tab, click **Scheduling Management**.

2. In the **Prohibited Clinic** search box, type a partial or full name of the clinic (minimum six characters).

3. Click **Find**.

   A list of prohibited clinics displays.

4. Select the appropriate prohibited clinic.

   A list of privileged users for the selected clinic displays.

5. Select a user from the **Privileged User** list for the selected prohibited clinic, and then click **Remove User**.

   If all privileged users need to be removed, click **Remove All**.
7.2.3 Creating Clinic Groups

To create a Clinic Group:

1. On the System tab, click Scheduling Management.
2. Select the Clinic Groups tab.
3. Click New Group.
4. Enter a name in the Clinic Group Name text box.
5. Click **OK**.
6. Select the newly added **Clinic Group**.
7. Enter a partial name search for a **Resource**, and then click **Find**.
   A resource can be a clinic or a provider that is active with an active person class.

![Find Resource](image)

**Figure 235: Find Resource**

8. Select the appropriate resource to add to the Clinic Group, and then click **Add Resource**.
   If all of the resources listed from the search need to be added, click **Add All**.
Figure 236: Add Resource to Clinic Group

9. Click OK to add the clinic group to the list.

7.2.4 Removing a Resource from a Clinic Group

To remove a resource from a Clinic Group:

1. On the System tab, click Scheduling Management.
2. Select the Clinic Groups tab.
3. Select a clinic group to be edited from the Clinic Groups list.
   Resources defined for the Clinic Group are displayed in the Resource List box.
4. Select a resource to remove, and then click Remove Resource.
   If all resources need to be removed, click Remove All.

Figure 237: Remove Resource from Clinic Group
8 Reports

The Reports tab allows you to view and print various reports. The Reports tab requires the SDECZMGR manager security key to access the tab. The following selections and reports are available:

- Audit Activity
- Clinics

![Figure 238: Reports Tab Selections](image)

8.1 The Audit Activity Report

8.1.1 Generating an Audit Activity Report for an Individual Scheduler

To view Audit Activity for an individual scheduler:

1. From the Reports tab, select Audit Activity. The Audit Activity dialog displays.
2. Select the individual scheduler’s name from the list.
3. Select Start Date and End Date. You can type the date or select it from the calendar.

![Figure 239: Audit Activity Report – Individual Scheduler](image)

The following columns display data for the selected scheduler, based upon the time frame specified:

- SchedulerIEN (New Person File)
- SchedulerName
- PatientContacts
- APPTEntries
- APPTAppointmentMade
- APPTClosed
• EWLEntries
• EWLAppointmentsMade
• EWLClosed
• Patient-Centered SchedulingAppointmentsMade
• ConsultAppointmentsMade
• AppointmentsCancelled
• TotalActions

4. Click **Close** to exit the Audit Activity report dialog box.

**8.1.2 Generating an Audit Activity Report for All Schedulers**

1. From the Reports tab select **Audit Activity**.
   The Audit Activity dialog displays.
2. From the **Scheduler** list select **All**.
3. Enter the **Start Date** and the **End Date** for the audit report.
4. Click View Audit Report.
   The following columns display data for All Schedulers based upon the time frame specified:
   • SchedulerIEN (Internal Entry Number – New Person File)
   • SchedulerName
   • PatientContacts
   • APPTEntries
   • APPTAppointmentsMade
   • APPTClosed
   • EWLEntries
   • EWLAppointmentsMade
   • EWLClosed
   • Patient-Centered SchedulingAppointmentsMade
   • ConsultAppointmentsMade
   • AppointmentsCancelled
   • TotalActions
   
   Note: APPT columns include actions on RTC requests.
5. Click **Close** to exit the Audit Activity report dialog box.
8.1.3 Working with Audit Activity Report Data

8.1.3.1 Sorting by Column Header

1. Log into VS GUI.
2. Select the Reports tab.
3. Select Audit Activity from the Reports section.

The Audit Activity dialog box displays for all schedulers defined in the New Person file (#200).

The following data displays on the screen for the selected scheduler:
- SchedulerIEN (New Person File)
- SchedulerName
- PatientContacts
- APPTEntries
- APPTAppointmentsMade
- APPTClosed
- EWLEntries
- EWLAppointmentsMade
- EWLClosed
- Patient-Centered Scheduling Appointments Made
- ConsultAppointmentsMade
- AppointmentsCancelled
- TotalActions

4. Select the applicable column header to change the sort order for the report by data specified in a different column.
To sort data in the specified column in ascending order, click the column header.

To sort data in the specified column in descending order, click the column header a second time.

5. Click **Close** to exit the Audit Activity Report dialog box.

8.1.3.2 Filtering by Column Data

1. Select a filter option from each column header to filter data in the Audit Activity report.

   **Note:** All schedulers who have greater than or equal to 10 APPT Appointments Made in the selected date range.
Multiple filters can be selected to refine results (i.e., All schedulers who have greater than or equal to 10 APPT Entries but less than or equal to 30 APPT Closed for the selected date range).

Selected filters are highlighted in column headers.

To remove filters, select the filter option in a column header, and then click **Clear Filter**.

2. Click **Close** to exit the Audit Activity report dialog box.

---

**Figure 243: Audit Activity Report – Filtered**

**Figure 244: Audit Activity Report – Multiple Filters**

### 8.1.4 Export an Audit Activity Report for Individual or All Schedulers

The data displayed on the screen can be exported to an Excel spreadsheet.

1. To export the audit report, click **Export Audit Report**.
   
   The Save As dialog box opens.

2. Select the location to save the report file.
   
   The default File name is “Audit Report”. You can edit if necessary.
   
   Confirm the “Save As Type” is Excel.

3. Click **Save**.
   
   The Report is generated. It contains data displayed on the screen in the Audit Activity dialog box and it is saved to the location specified in the Save As dialog box.

4. Click **Close** to exit the Audit Activity report dialog box.
8.2 Clinics Report

The Clinic Report is accessed from the Reports tab by selecting Clinics from the Reports section. The report displays clinic activity for all clinics, defined in the Hospital Location file as the default.

8.2.1 Clinic Activity Report – Individual Clinic

The Clinic Report can be limited to individual clinics.

1. Log into VS GUI.
2. Select Reports tab.
3. From the Reports section, click Clinics.
4. In the Clinic Activity dialog box, enter the clinic’s name (six-character minimum) that is defined in the Hospital Location file.
5. Click Search.

The following data displays on the screen for the selected clinic:
- Clinic name
- Division
- Stop Code
- Service
- CreateDT
- InactiveDT
- ReactiveDT
- AppType
- DefaultProv
- AdditionalProv
- ApptLength
- Variable
- MaxDays

6. Click the Clear button to remove the search criteria and return to the Clinic Activity report for all clinics.
7. Click Exit to close the Clinic Activity Report dialog box.

8.2.2 Working with the Clinic Activity Report

8.2.2.1 Sorting by Column Headers

1. Log into VS GUI.
2. Select the Reports tab.
3. Select **Clinics** from the Reports section.

The Clinic Activity dialog box displays for all clinics defined in the Hospital Location file (File #44).

The following data displays on the screen for the selected clinic:

- Clinic name
- Division
- Stop Code
- Service
- CreateDT
- InactiveDT
- ReactiveDT
- AppType
- DefaultProv
- AdditionalProv
- ApptLength
- Variable
- MaxDays

**Note:** The sort defaults in alphabetical order by the Clinic’s name.

4. To change the sort order for the report by data specified in a different column, select the applicable column header.

5. Click once on the column header to sorts the data in ascending order.

6. Click a second time on the column header to sort the data in descending order.

7. Click **Exit** to close the Clinic Activity Report dialog box.
8.2.2.2 Filtering Data by Column

Data in the Clinic’s Activity report can be filtered as follows:

1. Select the filter option in each column header (e.g., Clinic Activity data can be filtered by all Clinics with a defined Service of Rehab Medicine).
Multiple filters can be selected to refine results (e.g., Clinic Activity data can be filtered by all Clinics with a defined Service of Rehab Medicine that also have no DefaultProv defined). Selected filters are highlighted in column headers.

**To remove filters:**

1. Select a filter option in the column header, and then click **Clear Filter**.
2. Click **Exit** to close the Clinic Activity report dialog box.

### 8.2.3 Exporting a Clinic Report

**To export a Clinic Report:**

1. From the **Reports** tab, in the **Reports** section, select **Clinics**.

The **Clinic Activity** dialog box opens, displaying the report.
Figure 249: Clinic Activity

If applicable, search for a specific clinic in the Clinic Search field. Click **Search**.
If no specific clinic is used, ensure the full list is downloaded by scrolling down on the right several times until the last clinic on the list is the same when scroll to the bottom.

2. Click **Export Clinic Report**.

   A **Save As** dialog box opens.

3. Select the location to save the report.

   Confirm the file name. The default is “Clinic Report”.
   Confirm the Save as Type is Excel.

4. Click **Save**.

   Data displayed on the screen is exported to the file and saved to the specified location with the defined name.

5. Click **Exit** to close the Clinic Activity report dialog box.

Figure 250: Save As
9 Trash Queue Cleanup

WARNING: ONLY USE THIS OPTION IF DIRECTED BY HEALTH PRODUCT SUPPORT ADMIN TEAM. PLACE A TICKET IF YOUR SITE THINKS THIS MAY BE NEEDED.

During initial set-up of VS GUI, administrators who need to identify and purge unresolved requests, a task can be run to identify open appointment requests or duplicate appointment requests, close them, and produce a report for administrators. This excludes VAR requests which are called Veteran or Mobile requests, all stored in the SDEC APPT REQUEST file.

9.1 Compile List of Re-Opened REQUEST Records that Can Be Closed

During initial set-up of VS GUI, the following dialog allows the user to find open appointment requests or duplicate appointment requests to produce a report for administrators to review/verify.

The SDEC Initial Cleanup Utility will allow the Closing of Re-Opened SDEC APPT REQUEST records, which have resulted from a cancellation in VistA of a corresponding SDEC APPOINTMENT.

1. Log on to the VistA Legacy System.
2. Select VS GUI Initial Cleanup Utility [SDEC INITIAL CLEANUP UTILITY]
3. Select Compile List of Re-Opened REQUEST records that can be closed

To Compile a List of Re-Opened REQUEST records that can be closed:

1. Enter a list of Clinics (one by one) to EXCLUDE from Compilation.
2. Enter the Clinic to Exclude.
3. Press Enter to not exclude any Clinic.
   A dialog box displays “You did not choose any Clinics to Exclude”.
   Are you sure you want to run Cleanup for all clinics? Yes or No?
4. Click Yes to continue.
5. Click No to abort.
6. Select one of the following to print the results:
   • VistA Print Device
   • Spooler
   • VistA Email
   • Screen with capture
7. Review the list to ensure these are all extraneous open requests that should be auto-closed.
To Compile for all Clinics excluding the following:

- Select Option: SDEC Initial Cleanup Utility  VS GUI Initial Cleanup Utility

The following utility will allow the closing of re-opened SDEC APPT REQUEST records which have resulted from a cancellation in Vista of a corresponding SDEC appointment.

3. Select one of the following  Compile List of Re-opened Request Records that can be closed
2. Commit records to be closed from compiled list

WHAT WOULD YOU LIKE TO DO?: 1 Compile list of re-opened REQUEST records that can be closed

Please enter in, one by one, a list of Clinics to EXCLUDE from compilation.

Enter CLINIC to EXCLUDE: <Hit ENTER to not exclude any CLINICS>

You did not choose any Clinics to exclude.

Are you sure you want to run cleanup for all Clinics? (Y or N):? NO// YES

Compiling for all Clinics excluding the following:

DEVICE: HOME// HOME (CRT)

(You may enter a device that prints to a file, a printer, email message, or you may print on the screen.)

*** OPEN SDEC APPT REQUESTS LIST RUN JAN 09, 2017@02:48:47 ***

LAST 4 APPT REQUESTS

<table>
<thead>
<tr>
<th>CLINIC</th>
<th>PATIENT</th>
<th>SSN</th>
<th>APPT IEN</th>
<th>CID</th>
<th>DA==</th>
</tr>
</thead>
<tbody>
<tr>
<td>VSE ENH1 CLINIC</td>
<td>FAULCON, GONZALO J</td>
<td>2916</td>
<td>1747 ; 1985</td>
<td>12/27/2016</td>
<td></td>
</tr>
<tr>
<td>VSE ENH1 CLINIC</td>
<td>TEST, STERLING PAUL JR</td>
<td>0183</td>
<td>1752 ; 1988</td>
<td>12/27/2016</td>
<td></td>
</tr>
</tbody>
</table>
### 9.2 Commit Records to Be Closed from Compiled List

During initial set up of VS GUI, to commit Records to Be Closed from the Compiled List created via SDEC INITIAL CLEANUP UTILITY:

1. Log on to the VistA Legacy System.
2. Select VS GUI Initial Cleanup Utility [SDEC INITIAL CLEANUP UTILITY]
3. Select Commit Records to Be Closed from Compiled List
   
   A dialog box displays “What Would You like to Do?”

**To Commit Records to Be Closed from the Compiled List:**

1. Open SDEC APPT REQUEST Compilation Lists to choose from:
   
   The batch list displays records.
2. Enter the Batch # previously reviewed above. There may be several batches in the list from past compile jobs.
   
   A message displays “Committing Open records for Batch # to Closed… Done”

   After the task is completed, the Current Status changes to “Closed” and the Disposition fields in the SDEC APPT REQUEST file are set accordingly.

**To verify the record has been closed:**

1. Go to VA FileMan
2. Inquire to view the SDEC APPT REQUEST File (#409.85)
   
   View the following fields:
   - CURRENT STATUS
   - DATE DISPOSITIONED
   - DISPOSITIONED BY
   - DISPOSITION
   - DISPOSITION CLOSED BY CLEANUP

**SELECT OPTION:** SDEC INITIAL CLEANUP UTILITY VS GUI INITIAL CLEANUP UTILITY

**THE FOLLOWING UTILITY WILL ALLOW THE CLOSING OF RE-OPENED SDEC APPT REQUEST RECORDS WHICH HAVE RESULTED FROM A CANCELLATION IN VISTA OF A CORRESPONDING SDEC APPOINTMENT.**

4 **SELECT ONE OF THE FOLLOWING**

   **COMPILE LIST OF RE-OPENED REQUEST RECORDS THAT CAN BE CLOSED**

2 **COMMIT RECORDS TO BE CLOSED FROM COMPILED LIST**

**WHAT WOULD YOU LIKE TO DO?**

2 **COMMIT RECORDS TO BE CLOSED FROM COMPILED LIST**
<table>
<thead>
<tr>
<th>BATCH #</th>
<th>RUN USER</th>
<th>START DATE</th>
<th>FINISH DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>STUCK, ERIN</td>
<td>Dec 14, 2016@07:41:56</td>
<td>Dec 14, 2016@07:41:56</td>
</tr>
<tr>
<td>2</td>
<td>KRON, CAROLYN S</td>
<td>Dec 16, 2016@23:54:52</td>
<td>Dec 16, 2016@23:54:53</td>
</tr>
<tr>
<td>3</td>
<td>KRON, CAROLYN S</td>
<td>Dec 22, 2016@11:47:18</td>
<td>Dec 22, 2016@11:47:19</td>
</tr>
<tr>
<td>4</td>
<td>KRON, CAROLYN S</td>
<td>Jan 09, 2017@02:34:05</td>
<td>Jan 09, 2017@02:34:05</td>
</tr>
<tr>
<td>5</td>
<td>KRON, CAROLYN S</td>
<td>Jan 09, 2017@02:48:47</td>
<td>Jan 09, 2017@02:48:47</td>
</tr>
</tbody>
</table>

**ENTER BATCH #: 5**

**COMMITTING OPEN RECORDS FOR BATCH # 5 TO CLOSED...DONE**

Once the task completes, the CURRENT STATUS is changed to “CLOSED” and the DISPOSITION fields in the SDEC APPT REQUEST file are set accordingly.

To verify the record has been closed, go to VA FileMan and Inquire to view the SDEC APPT REQUEST File (#409.85). View the following fields:

- CURRENT STATUS
- DATE DISPOSITIONED
- DISPOSITIONED BY
- DISPOSITION
- DISPOSITION CLOSED BY CLEANUP
9.2.1.1 Systems Manager

3. Navigate to Fileman Record INQUIRY [RTZ INQ-FM-INQUIRY], either through the programmer prompts or through the site’s local fileman prompts.

4. Select Inquire to File Entries [DIINQUIRE]

5. Inquire to File Entries
   Output from What File: SDEC APPT REQUEST/

6. Select SDEC APPT REQUEST PATIENT:

7. Press Return
   To see more
   To exit
   OR
   Choose a number from the list

SELECT SYSTEMS MANAGER MENU OPTION: FM VA FILEMAN

VA FILEMAN VERSION 22.0

ENTER OR EDIT FILE ENTRIES
PRINT FILE ENTRIES
SEARCH FILE ENTRIES
MODIFY FILE ATTRIBUTES
INQUIRE TO FILE ENTRIES
UTILITY FUNCTIONS ...
DATA DICTIONARY UTILITIES ...
TRANSFER ENTRIES
OTHER OPTIONS ...

SELECT VA FILEMAN OPTION: INQUIRE TO FILE ENTRIES
OUTPUT FROM WHAT FILE: SDEC APPT REQUEST/
SELECT SDEC APPT REQUEST PATIENT: TEST, STERLING PAUL JR

5   TEST, STERLING PAUL JR
2   TEST, STERLING PAUL JR
3   TEST, STERLING PAUL JR
4   TEST, STERLING PAUL JR
3   TEST, STERLING PAUL JR

PRESS <RETURN> TO SEE MORE, ^C TO EXIT THIS LIST, OR CHOOSE 1-5:

PRESS <RETURN> TO SEE MORE, ^C TO EXIT THIS LIST, OR CHOOSE 10-15:
16 TEST, STERLING PAUL JR
17 TEST, STERLING PAUL JR
18 TEST, STERLING PAUL JR
19 TEST, STERLING PAUL JR
20 TEST, STERLING PAUL JR

PRESS <RETURN> TO SEE MORE, ^C TO EXIT THIS LIST, OR
CHOOSE 1-20: 16 TEST, STERLING PAUL JR

ANOTHER ONE:

STANDARD CAPTIONED OUTPUT? YES// (YES)
INCLUDE COMPUTED FIELDS: (N/Y/R/B): NO// B

DISPLAY AUDIT TRAIL? NO// Y YES

NUMBER: 1752 PATIENT: TEST, STERLING PAUL JR
CREATE DATE: DEC 23, 2016 INSTITUTION: CHEYENNE VAMC
REQUEST TYPE: APPOINTMENT
REQ APPOINTMENT TYPE: REGULAR
CREATED ON DEC 23, 2016@14:37:43 BY USER #520736464 (SDECRPC OPTION)
PATIENT STATUS: NEW
CREATED ON DEC 23, 2016@14:37:43 BY USER #520736464 (SDECRPC OPTION)
REQ SPECIFIC CLINIC: VSE ENH1 CLINIC
CREATED ON DEC 23, 2016@14:37:43 BY USER #520736464 (SDECRPC OPTION)
ORIGINATING USER: KRON, CAROLYN S PRIORITY: FUTURE
REQUESTED BY: PATIENT
CREATED ON DEC 23, 2016@14:37:43 BY USER #520736464 (SDECRPC OPTION)
CID/PREFERRED DATE OF APPT: DEC 27, 2016
CREATED ON DEC 23, 2016@14:37:43 BY USER #520736464 (SDECRPC OPTION)
CURRENT STATUS: CLOSED
CHANGED FROM OPEN ON JAN 09, 2017@02:49:09 BY USER #520736464
(SDEC INITIAL CLEANUP UTILITY OPTION)
CHANGED FROM CLOSED ON DEC 23, 2016@14:47:01 BY USER #520736464
(SDCANCEL OPTION)
CHANGED FROM OPEN ON DEC 23, 2016@14:38:10 BY USER #520736464
(SDECRPC OPTION)

ENTER RETURN TO CONTINUE, ^C TO EXIT:
CREATED ON DEC 23, 2016@14:37:43 BY USER #520736464 (SDECRPC OPTION)
COMMENTS: TEST
CREATED ON DEC 23, 2016@14:37:43 BY USER #520736464 (SDECRPC OPTION)
ENROLLMENT PRIORITY: GROUP 8 MULTIPLE APPOINTMENT RTC: NO
DATE/TIME ENTERED: DEC 23, 2016@13:37
DATE EDITED: DEC 23, 2016@14:37 EDITED BY: KRON, CAROLYN S
REQ SPECIFIC CLINIC: VSE ENH1 CLINIC
DATE DISPOSITIONED: JAN 09, 2017 DISPOSITIONED BY: KRON, CAROLYN S
DISPOSITION: ENTERED IN ERROR DISPOSITION CLOSED BY CLEANUP: YES
SERVICE CONNECTED PERCENTAGE: 0 SERVICE CONNECTED PRIORITY: NO
9.3 View Unresolved APPT Requests Reopened by the SDCANCEL Option

A user who has access to the VS GUI Requests Reopened by Cancel Availability [SDEC REQ REOPENED BY SDCANCEL] can view unresolved appointment requests. This is helpful after clinic availability has been canceled on a day with a lot of patients scheduled. If the user runs this report, it is a guide to which patients still have an open request sitting in VS GUI ready to be rescheduled.

To view unresolved appointment requests:

1. Go to the Outputs option under the Scheduling Manager’s Menu.
2. Select VS GUI Requests Reopened by Cancel Availability [SDEC REQ REOPENED BY SDCANCEL].
3. Select CLINIC:

Follow the steps shown below.

SELECT SCHEDULING MANAGER\S MENU OPTION: OUTPUTS

- AQK  ENCOUNTER ACTIVITY REPORT
- AQK2 ACNP STOP CODE REPORT
- CAAR CLINIC APPOINTMENT AVAILABILITY REPORT
- APPOINTMENT LIST
- APPOINTMENT MANAGEMENT REPORT
- CANCELLED CLINIC REPORT
- CLINIC ASSIGNMENT LISTING
- CLINIC LIST (DAY OF WEEK)
- CLINIC NEXT AVAILABLE APPT. MONITORING REPORT
- CLINIC PROFILE
- DISPLAY CLINIC AVAILABILITY REPORT
- ENROLLMENTS > X DAYS
- FILE ROOM LIST
- FUTURE APPOINTMENTS FOR INPATIENTS
- INPATIENT APPOINTMENT LIST
- MANAGEMENT REPORT FOR AMBULATORY PROCEDURES
- NO-SHOW REPORT
- PATIENT PROFILE MAS
- PCMM MAIN MENU ...
- PRINT SCHEDULING LETTERS
- PROVIDER/DIAGNOSIS REPORT
- RADIOLOGY PULL LIST
- ROUTING SLIPS
- VISIT RPT BY TRANSMITTED OPT ENCOUNTER
- VS GUI REQUESTS REOPENED BY CANCEL AVAILABILITY
- WORKLOAD REPORT
10 VistA Scheduling 508 Compliance

The following section outlines the process for executing the VistA Scheduling Application functionality using the keyboard. Many keyboard shortcuts have been added for ease of use. A consolidated list of all keyboard shortcuts is provided in Section 13.

10.1 The Tasks Tab

Ctrl + T is the keyboard shortcut to navigate to the Tasks Tab.

10.1.1 The Ribbon Bar

1. Log on to VS GUI as a scheduler.

   The Search field is highlighted and the cursor is blinking.

2. Press the Tab key to advance through the Ribbon Bar.

3. Beginning at the Patient Search field, move from left to right.

If the controls in each section listed below are enabled, when you press the tab key each one will be highlighted accordingly:

- Patient Search Field
- Search Button
- Clear Button
- Actions
- Arrangement
- Pending Appointments
- Special Needs/Preferences
- Mobile Requests
- Tools
- Print
After leaving the Tools section, you will be redirected to the Patient Search field.

Table 2: Keyboard Shortcuts for Ribbon Bar Components

<table>
<thead>
<tr>
<th>Ribbon Bar Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Search Field</td>
<td>ALT + S</td>
</tr>
<tr>
<td>Action</td>
<td>ALT + A</td>
</tr>
<tr>
<td>Arrangement</td>
<td>ALT + G</td>
</tr>
<tr>
<td>Pending Appointment Window</td>
<td>ALT + P</td>
</tr>
<tr>
<td>Special Needs/Preferences</td>
<td>ALT + N</td>
</tr>
<tr>
<td>Mobile Requests</td>
<td>ALT + M</td>
</tr>
<tr>
<td>Tools</td>
<td>ALT + T</td>
</tr>
</tbody>
</table>

10.1.2 Request Type Dialog

Using the Tab key:

1. From the Actions Pane, with the New Req. highlighted, press Enter. The Request Type dialog box displays. Focus is OK.
2. Press the Tab key to move to CLEAR.
3. Press the Tab key to move to APPT Request Type.
4. Press the Tab key to move to PATIENT-CENTERED SCHEDULING Request Type.
5. To select a Request Type, press the tab key to highlight, and then press the Space Bar key to select.
6. Press the Tab key to move to OK, and then press Enter.

Note: The arrow keys can also be used to navigate to the Request Type dialog box.

Table 3: Keyboard Shortcuts for Request Type

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>ALT + O</td>
</tr>
<tr>
<td>Clear</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>

10.1.3 Appointment Request
Using the Tab key:

The Appointment Request Dialog opens with OK highlighted. Use the Tab key to move to CLEAR and the Svc Related check box.

1. Press the Space Bar to select.
   
   Use the Tab key to move to Clinic (default) and Service/Specialty.

2. Press the Space Bar to select.

3. Press the Tab key to move to the Clinic field, and then enter the Clinic Name (four-character minimum).

4. Press the Tab key to move to the CID/Preferred Date field, and once highlighted press Enter to display Calendar control.

5. Use the up arrow and the down arrow to navigate the dates in the calendar, and then press Enter to select the date.

6. Press the Tab key to move to Appointment Type, and then use the arrow keys to select Appointment Type.

7. Press the Tab key to move to the Requested By field, and then use the arrow keys to select Requested By.

8. Press the Tab key to move to the Provider field (if applicable), and then enter the Provider name (three-character minimum).

9. Press the Tab key to move to the Multiple Appointments Required check box, and then press the Space Bar to select.

10. Press the Tab key to move to the Number of Appointments Required field, and then use the arrow keys to select the number of appointments required.

11. Press the Tab key to move to the Interval Between Appointments field, and then use the arrow keys to select the number of days between appointments.

12. Press the Tab key to move to the Comments field, and then enter your text.

13. Press the Tab key to move to OK, and then press Enter to select and create the APPT Request and exit the dialog box.

Table 4: Keyboard shortcuts for the Appointment Request

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>ALT + O</td>
</tr>
<tr>
<td>Clear</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>

Query

The Query Dialog box opens with the Patient field highlighted.
1. Enter the patient’s **Last Name, First Name** or the last initial and last four of the SSN.

2. Press the Tab key to move to **Find**, and then press **Enter**.
   Use the **Down Arrow** to highlight names in the **Patient** list.

3. Press the **Enter** key to select patients from the list to include in the query.

4. Press the Tab key to move to the **Patients** column.
   Use the **Down Arrow** to highlight the names listed.

5. To remove names from the selection press **Enter**.
   Use the Tab key to move to the **Request Type Filter**.

6. Press **Enter** to open the **Request Types** dialog box.
   Use the arrow keys to navigate to the **Request Type** selection grid.

7. Press the **Space Bar** to select the highlighted **Request Type**.
   Use the Tab key to move to **OK** to confirm the selection.
   Use the Tab key to **Cancel** the selection and exit the dialog box.

---

**The Clinic/Service Filter**

Use the Tab key to move to the **Clinic/Service Filter**.

1. Press **Enter** to open the **Clinics** dialog box.

2. Enter the **Clinic/Service** name in the blank field (four-character minimum).
   Use the Tab key to move to **Find** and the **Select All** check box.

3. Press the Space Bar to **Select All**.
   Use the Tab key to move to **Clinics** or **Services**.
   **Clinics** is the default.

4. Press the Space Bar to select the **Services** button.
   Use the arrow keys to navigate up and down the **Clinics/Service Grid**.
   Use the **Space Bar** to select/deselect from the list.

5. Press the Tab key to move to **OK**, and then press **Enter** to confirm the selections for the query.
   OR use the Tab key to **Cancel**

6. Press **Enter** to quit the selection and exit the dialog box.

---

**The Priority Group Filter**

1. Press the Tab key to move to the **Priority Group Filter** and then press **Enter**
   to display the **Priority Group** dialog box.
Use the Tab key to move to the Select All check box.

2. Press the Space Bar to select (if applicable).

3. Press the Tab key to move to the Priority Group grid.
   Use the up or down arrow to navigate up and down the list.
   Use the Space Bar to select/deselect the Priority Group options.

4. Press the Tab key to move to OK, and then press Enter to confirm the selections for the query.

   OR use the Tab key to Cancel

5. Press Enter to quit the selection and exit the dialog box.

**Wait Time**

1. Press the Tab key to move to the following:
   • Wait Time list.
   • SC Visit? List
   • Connected? list
   Use the arrow keys to navigate the options for the query selections.

2. Press the Tab key to move to the Origination Date field/CID/Preferred Date field.

3. Enter the date for the query selection as applicable.

4. Press the Tab key to move to the Urgency field (Applicable to Consult Requests only)/Change Sort field.

   Use the arrow keys to navigate to the list for query selection.

5. Press the Tab key to move to the Clear button, and then press Enter.

   The Clear Filter dialog box displays.

6. Press the Tab key to move to OK, and then press Enter to clear the Request Query dialog box of all filter selections and start the query selection process again.

7. Press the Tab key to move to Cancel and then press Enter to Cancel Clear Filter selection and exit the dialog box.

   **Note:** Selecting Cancel will keep the current Request Query filter selections for the query.

8. Press the Tab key to move to the Submit button, and then press Enter.

   The Request Query Confirmation dialog box opens.

9. Press the Tab key to move to OK, and then press Enter.

   The query results display in the Request Management Grid.
To Cancel the action:
1. Press the Tab key to Cancel.
2. Press the Enter key to abort the query results and return to the Request Query dialog box.
3. Press the Tab key to move to Close, and then press Enter to close the Request Query dialog box.

10.2 Systems Tab
To access the Systems Tab, press CTRL+Y.

10.2.1 Systems Tab Ribbon Bar
1. Press the Tab key to move to Scheduling Management.
2. Press Enter to display the Scheduling Management dialog box.
3. Press the Tab key to move to Availability, and then press Enter to open the Availability Selection dialog box.

Table 5: Keyboard Shortcuts for the Systems Tab Ribbon Bar

<table>
<thead>
<tr>
<th>Ribbon Bar Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systems Tab</td>
<td>CTRL + Y</td>
</tr>
<tr>
<td>Scheduling Management</td>
<td>ALT + M</td>
</tr>
<tr>
<td>Availability</td>
<td>ALT + H</td>
</tr>
<tr>
<td>Selected Clinic</td>
<td>ALT + L</td>
</tr>
</tbody>
</table>

10.2.2 Scheduling Management
10.2.2.1 Clinics and Users Tab
The Scheduling Management Dialog box opens on the Clinics and Users tab with the OK button highlighted. Focus is on OK button.
1. Press the Tab key to move to the Users Selection List.
   Use the Down Arrow to highlight the First Name in the Users List.
2. Press Enter to select the User Name, and then press the Tab key to move to the Prohibited Clinic field.
3. Enter the Clinic Name.
4. Press the Tab key to move to the Find button, and then press Enter.
   The Prohibited Clinic List is displayed.
Use the arrow keys to navigate up and down the list.

5. Press the Tab key to move to the **Privileged Users List** for users who are assigned to the selected clinic.

Use the Tab key to move to the **Add User** button, the **Remove User** button or the **Remove All** button.
Table 6: Keyboard Shortcuts for Scheduling Management

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add User</td>
<td>ALT + A</td>
</tr>
<tr>
<td>Remove User</td>
<td>ALT + R</td>
</tr>
<tr>
<td>Remove All</td>
<td>ALT + E</td>
</tr>
<tr>
<td>Find</td>
<td>ALT + F</td>
</tr>
<tr>
<td>OK</td>
<td>ALT + O</td>
</tr>
<tr>
<td>Cancel</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>

10.2.2.2 Clinic Groups Tab

When the user accesses the Clinic Group tab, the OK button is highlighted.

1. Press the Tab key to move to Resources.
2. Enter the Clinic Schedule Resource criteria
   — User name, Clinic Name, Clinic Group
3. Press the Tab key to move to the Find button, and then press Enter.
   Use the down arrow to highlight the first name in the Resource List.
4. Press the Tab key to move to the following:
   - New Group
   - Edit Group
   - Remove Group
   - Clinic Groups List
   - Add Resource
   - Add All
   - Remove Resource
   - Remove All

Table 7: Keyboard Shortcuts for the Clinic Groups Tab

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Group</td>
<td>ALT + N</td>
</tr>
<tr>
<td>Edit Group</td>
<td>ALT + E</td>
</tr>
<tr>
<td>Remove Group</td>
<td>ALT + R</td>
</tr>
<tr>
<td>Add Resource</td>
<td>ALT + S</td>
</tr>
<tr>
<td>Add All</td>
<td>ALT + L</td>
</tr>
<tr>
<td>Remove Resource</td>
<td>ALT + D</td>
</tr>
<tr>
<td>Remove All</td>
<td>ALT + X</td>
</tr>
</tbody>
</table>
10.2.3 Availability Selection

The Availability Selection Dialog box opens with the OK button highlighted.

1. Press the Tab key to move to the Cancel button.
2. Press the Tab key to move to the Search by Name field.
3. Enter the Clinic Name (four-character minimum).
4. Press the Tab key to move to the Resource List Grid.
   Use the arrow keys to navigate up and down the Resource List.
5. Press Enter to select the highlighted Resource.
   The Select Clinic Availability displays.

Table 8: Keyboard Shortcuts for the Availability Selection

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Field</td>
<td>ALT + S</td>
</tr>
<tr>
<td>First Row of Results Grid</td>
<td>ALT + G</td>
</tr>
<tr>
<td>OK</td>
<td>ALT + O</td>
</tr>
<tr>
<td>Cancel</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>

10.3 The Reports Tab

To access the Reports Tab press CTRL+R.

10.3.1 Reports Tab Ribbon Bar

1. Press the Tab key to move to Audit Activity.
2. Press the Tab key to move to Clinics.
3. Press the Tab key to move to Management Reports.
Table 9: Keyboard Shortcuts for the Reports Tab Ribbon Bar

<table>
<thead>
<tr>
<th>Ribbon Bar Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reports Tab</td>
<td>Ctrl + R</td>
</tr>
<tr>
<td>Reports</td>
<td>Alt + R</td>
</tr>
</tbody>
</table>

10.3.2 Audit Activity

The Audit Activity dialog box opens with the Close button highlighted.

1. Press the Tab key to move to the Scheduler list.
   The default is All.
   Use the Down Arrow to select a user’s name (listed in alphabetical order).
2. Enter the user’s name (last name, first name) to go directly to the specific user.
3. Press the Tab key to move to the Start Date field, and then press Enter to select the Calendar.
   Use the arrow keys to select the date.
4. Press the Tab key to move to the End Date field, and then press Enter to select the Calendar.
   Use the arrow keys to select the date.
5. Press the Tab key to move to the View Audit Report, and then press Enter to display the Audit Report in Grid.
6. Press the Tab key to move to the Export Audit Report, and then press Enter to open the Save As dialog box.

   Note: Only data displayed on the screen will appear in the exported Audit Report.

   You can use the Tab key to navigate the Audit Report Grid.

Table 10: Keyboard Shortcuts for Audit Activity

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduler drop down</td>
<td>ALT + S</td>
</tr>
<tr>
<td>Audit Report</td>
<td>ALT + V</td>
</tr>
<tr>
<td>Export Report</td>
<td>ALT + E</td>
</tr>
<tr>
<td>Close</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>
10.3.3 Clinic Activity

The Clinic Activity dialog box opens with the Exit button highlighted.

1. Press the Tab key to move to the Clinic Search field, and then enter the Clinic Name (six-character minimum).
2. Press the Tab key to move to the Search button, and then press Enter.
3. Press the Tab key to move to the Clinic Results Grid.

Use the Tab key to navigate through the Clinic Results Grid including the Column Headers and Filters.

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Button</td>
<td>ALT + S</td>
</tr>
<tr>
<td>Clear</td>
<td>ALT + C</td>
</tr>
<tr>
<td>Export</td>
<td>ALT + E</td>
</tr>
<tr>
<td>Exit</td>
<td>ALT + X</td>
</tr>
</tbody>
</table>

11 Troubleshooting

Contact the Enterprise Service Desk (ESD), formally the National Service Desk (NSD), and open a ticket for any VS GUI related issues. At the time of publishing, the phone number is 855-673-HELP (4357).

VSE Pulse page resources and training aids:

- Frequently Asked Questions/Known Issues document: https://www.vapulse.net/docs/DOC-107042
- Scheduler: https://www.vapulse.net/community/vista-scheduling-enhancements-vse
- Super User: https://www.vapulse.net/groups/vse-super-users
- National Return to Clinic Order Implementation: https://www.vapulse.net/groups/return-to-clinic-rtc

11.1 Changing User ID and Password

Contact your supervisor or System Administrator for User ID or Password changes.
### 11.2 Special Instructions for Error Correction

Some potential warning messages are listed here.

**Table 12: Warning Messages**

<table>
<thead>
<tr>
<th>Reason for Message</th>
<th>Message</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sensitive Information Warning</td>
<td>Warning displays to the user: <em><strong>WARNING</strong></em></td>
<td>Click OK</td>
<td>User is able to log into the Security Log Audit Trail</td>
</tr>
<tr>
<td></td>
<td><em><strong>RESTRICTED RECORD</strong></em></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Warning for similar names and SSN</td>
<td>Similar Names dialog displays System lit patients with similar name and same last four digits of SS#</td>
<td>Click OK</td>
<td>User is able to continue</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accessing deceased patient's record</td>
<td>This patient died on &lt;Date of Death&gt; Do you wish to continue?</td>
<td>Click OK</td>
<td>User is able to perform action such as Disposition, Cancel Appointments</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accessing own record at selection</td>
<td>Security regulations prohibit computer access to your own medical record.</td>
<td>Click OK</td>
<td>User is unable to perform any activity/actions</td>
</tr>
</tbody>
</table>
## 12 Acronyms and Abbreviations

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Block</td>
<td>A color-coded representation of the amount of time allotted for a specific Access Type (or appointment).</td>
</tr>
<tr>
<td>Access Groups</td>
<td>Categories of Access Types. Assigning Access Types to Access Groups makes it easier to schedule and search for certain types of appointments.</td>
</tr>
<tr>
<td>Access Types</td>
<td>The variety of different appointment types available in the Legacy VistA Scheduling package. Each type of appointment, such as routine physical, dental, walk-in, or other specific appointment type is an Access Type.</td>
</tr>
<tr>
<td>AMIE</td>
<td>Automated Medical Information Exchange</td>
</tr>
<tr>
<td>API</td>
<td>Application Program Interface</td>
</tr>
<tr>
<td>APPT</td>
<td>Appointment: A scheduled or unscheduled meeting between patient and healthcare professional.; an appointment can include several encounters with providers or clinics for tests, procedures, etc.</td>
</tr>
<tr>
<td>CID</td>
<td>Clinically Indicated Date</td>
</tr>
<tr>
<td>Clinic</td>
<td>A medical center location where patients receive care by a doctor or authorized provider.</td>
</tr>
<tr>
<td>CPRS</td>
<td>Computerized Patient Record System</td>
</tr>
<tr>
<td>Enh</td>
<td>Enhancement</td>
</tr>
<tr>
<td>EWL</td>
<td>Electronic Wait List</td>
</tr>
<tr>
<td>GUI</td>
<td>Graphical User Interface</td>
</tr>
<tr>
<td>MUMPS</td>
<td>Massachusetts General Hospital Utility Multi-Programming System</td>
</tr>
<tr>
<td>MRTC</td>
<td>Multiple Return To Clinic</td>
</tr>
<tr>
<td>NSR</td>
<td>New Service Request</td>
</tr>
<tr>
<td>OI&amp;T</td>
<td>Office of Information and Technology</td>
</tr>
<tr>
<td>OOS</td>
<td>Occasion of Service</td>
</tr>
<tr>
<td>OT3</td>
<td>Optional Task #3</td>
</tr>
<tr>
<td>OT4</td>
<td>Optional Task #4</td>
</tr>
<tr>
<td>Term</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>OVAC</td>
<td>Office For Veterans Access to Care</td>
</tr>
<tr>
<td>PACT</td>
<td>Patient-Aligned Care Teams</td>
</tr>
<tr>
<td>PII</td>
<td>Personally Identifiable Information</td>
</tr>
<tr>
<td>PIMS</td>
<td>Patient Information Management System</td>
</tr>
<tr>
<td>POC</td>
<td>Point of Contact</td>
</tr>
<tr>
<td>PRF</td>
<td>Patient Record Flag</td>
</tr>
<tr>
<td>Provider</td>
<td>A doctor or other authorized provider in the medical center who provides patient care.</td>
</tr>
<tr>
<td>PT</td>
<td>Patient</td>
</tr>
<tr>
<td>PWS</td>
<td>Performance Work Statement</td>
</tr>
<tr>
<td>RM Grid</td>
<td>Request Management Grid</td>
</tr>
<tr>
<td>RTC</td>
<td>Return to Clinic</td>
</tr>
<tr>
<td>SDMOB</td>
<td>Scheduling Master Overbook</td>
</tr>
<tr>
<td>SDOB</td>
<td>Scheduling Overbook</td>
</tr>
<tr>
<td>Slot</td>
<td>Number of appointments per defined appointment length that have been previously set up in VistA Scheduling. For example, if “Slots = 4” and the clinic (resource) appointment length is 30 minutes, then there are four available appointments for every 30 minutes.</td>
</tr>
<tr>
<td>SSN</td>
<td>Social Security Number</td>
</tr>
<tr>
<td>T4</td>
<td>Transformation Twenty-One Total Technology</td>
</tr>
<tr>
<td>TAC</td>
<td>Technology Acquisition Center</td>
</tr>
<tr>
<td>TCP/IP</td>
<td>Transmission Control Protocol/Internet Protocol</td>
</tr>
<tr>
<td>VA</td>
<td>Department of Veterans Affairs</td>
</tr>
<tr>
<td>VAR</td>
<td>Veteran Appointment Request</td>
</tr>
<tr>
<td>VCL</td>
<td>Veterans Crisis Line</td>
</tr>
<tr>
<td>VHA</td>
<td>Veterans Health Administration</td>
</tr>
</tbody>
</table>
Table:

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>VistA</td>
<td>Veterans Health Information Systems and Technology Architecture</td>
</tr>
<tr>
<td>VL</td>
<td>Variable Length</td>
</tr>
<tr>
<td>VS</td>
<td>VistA Scheduling</td>
</tr>
<tr>
<td>VSE</td>
<td>VistA Scheduling Enhancements</td>
</tr>
</tbody>
</table>

13 Keyboard Shortcuts Quick List

Patient demographic information can be displayed and edited at any point in the process by entering `CTRL + P` to open the Patient Info screen.

Ribbon Bar Components

<table>
<thead>
<tr>
<th>Ribbon Bar Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patient Search Field</td>
<td>ALT + S</td>
</tr>
<tr>
<td>Action</td>
<td>ALT + A</td>
</tr>
<tr>
<td>Arrangement</td>
<td>ALT + G</td>
</tr>
<tr>
<td>Pending Appointment Window</td>
<td>ALT + P</td>
</tr>
<tr>
<td>Special Needs/Preferences</td>
<td>ALT + N</td>
</tr>
<tr>
<td>Mobile Requests</td>
<td>ALT + M</td>
</tr>
<tr>
<td>Tools</td>
<td>ALT + T</td>
</tr>
</tbody>
</table>

Request Type

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>ALT + O</td>
</tr>
<tr>
<td>Clear</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>

Appointment Request

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>OK</td>
<td>ALT + O</td>
</tr>
<tr>
<td>Clear</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>
### Systems Tab Ribbon Bar

<table>
<thead>
<tr>
<th>Ribbon Bar Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Systems Tab</td>
<td>CTRL + Y</td>
</tr>
<tr>
<td>Scheduling Management</td>
<td>ALT + M</td>
</tr>
<tr>
<td>Availability</td>
<td>ALT + H</td>
</tr>
<tr>
<td>Selected Clinic</td>
<td>ALT + L</td>
</tr>
</tbody>
</table>

### Scheduling Management

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add User</td>
<td>ALT + A</td>
</tr>
<tr>
<td>Remove User</td>
<td>ALT + R</td>
</tr>
<tr>
<td>Remove All</td>
<td>ALT + E</td>
</tr>
<tr>
<td>Find</td>
<td>ALT + F</td>
</tr>
<tr>
<td>OK</td>
<td>ALT + O</td>
</tr>
<tr>
<td>Cancel</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>

### Clinic Groups Tab

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Group</td>
<td>ALT + N</td>
</tr>
<tr>
<td>Edit Group</td>
<td>ALT + E</td>
</tr>
<tr>
<td>Remove Group</td>
<td>ALT + R</td>
</tr>
<tr>
<td>Add Resource</td>
<td>ALT + S</td>
</tr>
<tr>
<td>Add All</td>
<td>ALT + L</td>
</tr>
<tr>
<td>Remove Resource</td>
<td>ALT + D</td>
</tr>
<tr>
<td>Remove All</td>
<td>ALT + X</td>
</tr>
<tr>
<td>OK</td>
<td>ALT + O</td>
</tr>
<tr>
<td>Cancel</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>

### Availability Selection

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Field</td>
<td>ALT + S</td>
</tr>
<tr>
<td>First Row of Results Grid</td>
<td>ALT + G</td>
</tr>
<tr>
<td>OK</td>
<td>ALT + O</td>
</tr>
<tr>
<td>Cancel</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>
### Reports Tab Ribbon Bar

<table>
<thead>
<tr>
<th>Ribbon Bar Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reports Tab</td>
<td>CTRL + R</td>
</tr>
<tr>
<td>Reports</td>
<td>ALT + R</td>
</tr>
</tbody>
</table>

### Audit Activity

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scheduler list</td>
<td>ALT + S</td>
</tr>
<tr>
<td>Audit Report</td>
<td>ALT + V</td>
</tr>
<tr>
<td>Export Report</td>
<td>ALT + E</td>
</tr>
<tr>
<td>Close</td>
<td>ALT + C</td>
</tr>
</tbody>
</table>

### Clinic Activity

<table>
<thead>
<tr>
<th>Component</th>
<th>Keyboard Shortcut</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Button</td>
<td>ALT + S</td>
</tr>
<tr>
<td>Clear</td>
<td>ALT + C</td>
</tr>
<tr>
<td>Export</td>
<td>ALT + E</td>
</tr>
<tr>
<td>Exit</td>
<td>ALT + X</td>
</tr>
</tbody>
</table>