VS GUI User Guide Addendum

Release 1.7.7.1 Update
## Revision History

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1 Introduction

Department of Veterans Affairs (VA) Veterans Health Information Systems and Technology Architecture (VistA) Scheduling Graphical User Interface (VS 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 that supports COVID-19 response. 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 System Summary for a more detailed description of VS GUI functionality.

1.3 Disclaimers

1.3.1 Software Disclaimers

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1.3.2 Documentation Disclaimers

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Web site or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of the VA.
1.4  Project References

1.4.1  Information

The VS GUI points of contact (POCs) include:

» OVAC Program Office – REDACTED
» OIT VistA Scheduling Enhancement (VSE) Technical Manager – REDACTED
» OVAC Emerging Technologies Project Manager – REDACTED
» OVAC Emerging Technologies Acting Legacy Program Manager – REDACTED
» OVAC Emerging Technologies VSE Subject Matter Expert (SME) – REDACTED
» OVAC Emerging Technologies VSE Subject Matter Expert (SME) – REDACTED
» OVAC Emerging Technologies VSE Subject Matter Expert (SME) – REDACTED

VSE Resources

» Veterans Health Administration (VHA) VSE SharePoint: REDACTED
» VA Software Document Library (VDL) – Scheduling (VSE manuals near the bottom): [URL]
  https://www.va.gov/vdl/application.asp?appid=100
» National Return to Clinic (RTC) Order: REDACTED
2 System Summary

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

This update is for the nationally released version 1.7.7.1, which includes VS GUI 1.7.7.1 and Emergency VistA patch SD*5.3*785. At time of publishing, install period is projected for June 2021.

VS GUI Release 1.7.7.1 introduces the ability to schedule video appointments directly from the VistA Scheduling GUI application. This new functionality includes making, editing, and cancelling video appointments, as well as the ability to resend a VVS appointment link to Video Visit participants. Release 1.7.7.1 also includes enhancements to the Request Management (RM) Grid to improve overall performance, an update to the patient search function, an update to patient letters to remove title from the salutation and 508 issue fixes.

Accompanying patch SD*5.3*785 enhances two options available in the Scheduling Supervisor menu:

» Pending Return to Clinic (RTC) cleanup - by Date

» Pending Return to Clinic (RTC) cleanup – FULL

These options now include prompts for the user before running, as well as a report of changes made.

3 Key Feature Update in Version 1.7.7.1

3.1 Making a Video Visit Service (VVS) Appointment

Schedulers can now Make, View, Edit and Cancel VVS appointments from the VS GUI.

When a scheduler selects “Add Appointment” in a video clinic, a dialog displays asking if they want to create a video visit for the appointment.

Note: When making VVS appointment, if a tester is logged in using access/verify codes they will be prompted to select a PIV certificate. Otherwise, they will just be prompted for their PIN.
Figure 1: Create Video Visit Appointment Dialog Box

If the scheduler selects “Yes,” the Create Video Visit window displays. (see below)
The patient contact information will be pre-populated in the Make Video Visit form if it is available. If not, the scheduler must enter the patient’s email, as well as provider information. Schedulers may also enter guest and staff information to the appointment.
After filling out the necessary details the scheduler clicks “Make Video Visit Appointment,” the video appointment is created, and a corresponding VistA appointment is created.

Cancelling a VVS appointment from VS GUI follows the same workflow as cancelling a regular appointment.

3.2 View/Edit a Video Visit Service (VVS) Appointment

3.2.1 Add VVS to an existing non-VVS Appointment

1. Open the Edit Appointment window for the non-VVS appointment. Click on the “Create Video Visit” Button at the bottom of the window.
2. A “Make Video Visit” form displays. After filling out all the patient and provider details click on Make Video Visit Appointment.
3.2.2 View/Edit VVS Appointments

1. To view VVS Appointments, open the View Appointment window and click on the “View Video Visit” button at the bottom of the appointment window.
2. After clicking the “View Video Visit” button a video visit form window displayed.
3. To edit existing VVS appointments, open the Edit Appointment window and click on the Edit Video Visit button at the bottom of the window.
4. After making the changes to the appointment click on the “update Video Visit Appointment” button.
3.3 New Patient Search

Patient search is now a pop-up window. Click on the Search Patients link to open patient search.
Figure 10: Search Patients Link

Enter search criteria—results will display in real time in the results pane.

Figure 11: Patient Search Pop-up Window
Select a patient from the list to pull up that patient record.

![Figure 12: Selected Patient Records](image)

### 3.4 Modified Patient Letter

Patient letters now address the patient by name only, rather than by title (Mr./Ms.) and name.

![Figure 13: Patient Appointment Letter](image)
3.5 Pending Return to Clinic (RTC) Order Cleanup

The Pending RTC Order Cleanup options address a scenario where RTC orders with scheduled appointments are stuck in “Pending” status in CPRS. The option is for emergency use to address a data issue resulting from improper use of FileMan to disposition RTC requests and is available only to users with the SDSUP key.

To run the Pending RTC Cleanup option, navigate to the Scheduling Supervisor menu.

Figure 14: Running Pending RTC Cleanup by Date or FULL
3.5.1 Pending RTC cleanup – by Date

To run the cleanup by date, select Pending RTC cleanup – by Date.

You will be prompted to enter a start date, as shown below.

| Selection will be made based off of the create date of the Request |
| SDEC APPOINTMENT REQUEST CREATE DATE to start selection: 5/4/2021// |

Input a start date and press Enter.

| SDEC APPOINTMENT REQUEST CREATE DATE to start selection: 5/4/2021// 4/1/2021 (APR 01, 2021) |

Input an end date and press Enter.

| SDEC APPOINTMENT REQUEST CREATE DATE to end selection: 6/3/2021// (JUN 03, 2021) |

You will be prompted to confirm that you want to run the cleanup. Enter Y or N.

| Are you sure you would like to run the SDEC PENDING RTC clean-up? Y (Yes) |
| DEVICE: HOME// HOME (CRT) Right Margin: 80// |

Starting search and clean-up....

When complete, the option will print results to the screen, including specific orders updated, their original status, and any orders skipped and why.
Orders updated via the Clean-up Tool:

Request IEN = 248291 Patient = HOGUE Clinic = LORI AUDIO
Order IEN10793623
Original Order Status = PENDING
Order Status After Cleanup = COMPLETE
Request Disposition = REMOVED/SCHEDULED-ASSIGNED
Disposition Date = May 14, 2021
Disposition By = BARBER

Request IEN = 248293 Patient = HOGUE Clinic = LORI 20 MINUTE
Order IEN10793624
Original Order Status = PENDING
Order Status After Cleanup = COMPLETE
Request Disposition = REMOVED/SCHEDULED-ASSIGNED
Disposition Date = May 14, 2021
Disposition By = BARBER

Request IEN = 248294 Patient = BARBER,TEST Clinic = LORI AUDIO
Order IEN10793625
Original Order Status = PENDING
Order Status After Cleanup = COMPLETE
Request Disposition = REMOVED/SCHEDULED-ASSIGNED
Disposition Date = May 14, 2021
Disposition By = BARBER

Request IEN = 248295 Patient = BARBER Clinic = LORI TEST 20
Order IEN10793626
Original Order Status = PENDING
Order Status After Cleanup = COMPLETE
Request Disposition = REMOVED/SCHEDULED-ASSIGNED
Disposition Date = May 13, 2021
Disposition By = BUTLER

Request IEN = 248388 Patient = HOGUE Clinic = LORI ENCOUNTER CLINIC
Order IEN10793638
Original Order Status = PENDING
Order Status After Cleanup = COMPLETE
Request Disposition = REMOVED/SCHEDULED-ASSIGNED
Expiration Date = May 14, 2021
Expiration By = BARBER

The following SDEC APPOINTMENT REQUEST IENs were skipped:
Request IEN 248296:
Disposition By field is Missing
Expiration Date field is Missing
Disposition field is missing
Request IEN 248297:
Expiration By field is Missing
Expiration field is missing

Search and clean-up is complete!!!!!
5 Orders were updated!

Orders that are updated will be saved for 7 days in the "TMP\OR PENDING RTC CLEAN-UP-May 14, 2021",21676 global.

Figure 15: Pending RTC Clean-up by Date Results

3.5.2 Pending RTC Cleanup – Full
To run the cleanup in full, select Pending RTC cleanup – FULL. You will be prompted to confirm you want to run the clean-up.

This routine will search through existing Closed Return to Clinic SDEC Appointment Requests with a corresponding Order that is in a Pending status and update as needed.

Are you sure you would like to run the FULL SDEC PENDING RTC clean-up?
Enter Y or N
Orders updated via the Clean-up Tool:

Request IEN = 248292 Patient = Hogue Clinic = Lori Audio
Order IEN10793622
  Original Order Status = PENDING
  Order Status After Cleanup = COMPLETED
Request Disposition = REMOVED/SCHEDULED-ASSIGNED
  Disposition Date = May 14, 2021
  Dispositioned By = Barber

******************************************************************************

The following SDEC APPOINTMENT REQUEST IENs were skipped:

Request IEN 248353:
  Disposition By field is Missing
  Disposition Date field is Missing
  Disposition field is missing
Search and clean-up is complete!!! All Orders were updated!

Orders that are updated will be saved for 7 days in the `XTMP("OR PENDING RTC CLEAN-UP-May 14, 2021",21676 global

Figure 16: Pending RTC Clean-up Full Results