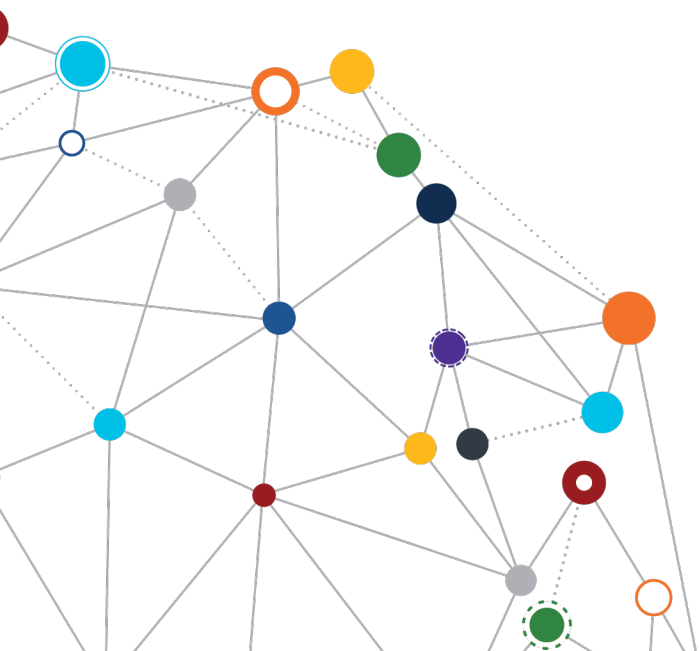




OFFICE OF
INFORMATION
AND TECHNOLOGY

Clinic Configurations Manager User Interface (CCM-UI) User Guide

Version 1.14.0 | June 2026



VA



U.S. Department of Veterans Affairs
Office of Information and Technology



Table of Contents

1. INTRODUCTION	10
1.1 OVERVIEW	10
1.2 PREREQUISITE CREDENTIALS	10
1.3 PIV LOGIN	10
2. FAMILIARIZING YOURSELF WITH CCM-UI	12
2.1 CHANGING SITE LOCATIONS	12
2.2 MY ACCOUNT	13
2.2.1 <i>User Preferences</i>	13
2.2.1.1 Default Site Location Preferences	14
2.2.1.2 Locations in Site Selector Preferences	15
2.2.1.3 Default Create New Clinic Accordion Preferences	16
2.2.2 <i>Logging Out of CCM-UI</i>	17
2.3 RESOURCES	18
2.4 FILTERS	19
2.4.1 <i>Sort by Ascending and Descending</i>	19
2.4.2 <i>Toggle Density</i>	20
2.4.3 <i>Filtering Rows</i>	20
2.4.4 <i>Filtering Columns</i>	21
2.4.5 <i>Show, Hide, and Search Filters</i>	23
2.4.6 <i>Search Function</i>	25
3. SEARCH AND VIEW CLINIC CONFIGURATIONS	26
3.1 SEARCH FOR A CLINIC CONFIGURATION	26
3.2 VIEW CURRENT CLINIC CONFIGURATIONS	28
3.2.1 <i>Viewing Clinic Settings</i>	29
3.2.2 <i>Viewing Preselected Settings</i>	30
3.2.3 <i>Viewing Optional Settings</i>	30
3.2.4 <i>Viewing Clinic Availability</i>	31
4. EDITING CLINIC CONFIGURATIONS	34
4.1 EDITING MANDATORY FIELDS	35
4.2 EDITING PRESELECTED DEFAULT FIELDS	37
4.3 EDITING OPTIONAL FIELDS	38
4.4 EDITING CLINIC AVAILABILITY	40
4.4.1 <i>Add or Modify Timeslots for Single Day Modification</i>	42
4.4.1.1 Adding Timeslots for Single Day Modification	44
4.4.1.2 Removing Timeslots for Single Day Modification	53
4.4.2 <i>Add or Modify Timeslots for Indefinite Modification</i>	58
4.4.2.1 Adding Timeslots for Indefinite Modification	60
4.4.2.2 Removing Timeslots for Indefinite Modification	69
4.4.3 <i>Add or Modify Timeslots for Multi-select Modification</i>	75
4.4.3.1 Adding Timeslots for Multi-select Modification	77
4.4.3.2 Removing Timeslots for Multi-select Modification	87
4.4.4 <i>Add or Modify Timeslots for Recurring Modification</i>	93
4.4.4.1 Adding Timeslots for Recurring Modification	95
4.4.4.2 Removing Timeslots for Recurring Modification	104
4.5 CANCELLING AND RESTORING TIMESLOTS	110
4.5.1 <i>Cancelling a Timeslot</i>	111
4.5.1.1 Cancelling for a Single Timeslot	112
4.5.1.2 Entire Day Cancellation	115

4.5.2 Restoring a Timeslot	118
4.5.2.1 Restoring for a Single Day Timeslot	118
4.5.2.2 Entire Day Restoration	120
4.6 CREATING A NEW CLINIC	121
4.6.1 Mandatory Fields	123
4.6.2 Preselected Settings	124
4.6.3 Optional Settings	125
4.7 INACTIVATING AND REACTIVATING A CLINIC	126
4.7.1 Inactivating a Clinic	127
4.7.2 Reactivating a Clinic	129
4.8 REPLICATING A CLINIC	133
5. CLINIC AUDIT REPORT	139
5.1 FAMILIARIZING YOURSELF WITH THE CLINIC AUDIT REPORT	139
5.2 FILTERING REPORTS AND EXPORTING DATA	141
5.2.1 Filtering Results	141
5.2.2 Filtering with Dropdowns	142
5.2.3 Filtering by Date Range	142
5.3 EXPORTING DATA	143
6. LETTERS	144
6.1 CREATE A LETTER	144
6.2 VIEW A LETTER	146
6.3 EDIT A LETTER	148
6.4 DELETE A LETTER	150
7. VA TOOL SET	151
7.1 VETERAN SELF SCHEDULING	152
7.1.1 View Veteran Self Scheduling	152
7.1.2 Edit Veteran Self Scheduling	153
7.2 VETERAN APPOINTMENT REQUESTS	156
7.2.1 View Veteran Appointment Requests	156
7.2.2 Edit Veteran Appointment Requests	158
8. ANNUAL CLINIC PROFILE REVIEW	161
9. REFERENCES	163
9.1 ADDITIONAL FEATURES AND OPTIONS FOR CCM-UI	163
9.2 TOOL TIP DESCRIPTIONS	163
9.3 ADDITIONAL HELP WITH ERRORS	168
9.3.1 Connection Issues Error	168
9.3.2 Server Issue Error	168

Table of Figures

FIGURE 1: ACCESS PERMISSIONS NOTIFICATION	10
FIGURE 2: PIV CARD SIGN-ON IMAGE	11
FIGURE 3: ACTIVCLIENT LOGIN POP-UP WINDOW	11
FIGURE 4: CHANGE SITE LOCATIONS BUTTONS	12
FIGURE 5: CHANGE SITE LOCATION ACCORDION	12
FIGURE 6: VIEW SETTINGS BUTTON	13
FIGURE 7: MY ACCOUNT BUTTON FOR USER PREFERENCES	13
FIGURE 8: PREFERENCES BUTTON	14

FIGURE 9: DEFAULT SITE LOCATION DROPDOWN BUTTON-----	14
FIGURE 10: SAVE CHANGES BUTTON FOR DEFAULT SITE LOCATIONS -----	14
FIGURE 11: CLEAR SELECTION BUTTON FOR DEFAULT SITE LOCATION -----	15
FIGURE 12: TOGGLE BUTTON FOR LOCATIONS IN SITE SELECTOR-----	15
FIGURE 13: SAVE CHANGES BUTTON FOR LOCATIONS IN SITE SELECTOR -----	16
FIGURE 14: SHOW ALL BUTTON FOR LOCATIONS IN SITE SELECTOR-----	16
FIGURE 15: CHECKBOX FOR DEFAULT ACCORDIONS TO OPEN -----	16
FIGURE 16: SAVE CHANGES BUTTON FOR DEFAULT ACCORDIONS TO OPEN-----	17
FIGURE 17: MY ACCOUNT BUTTON FOR CCM-UI -----	17
FIGURE 18: LOG OUT BUTTON FOR CCM-UI-----	18
FIGURE 19: LOGGED OUT OF MOBILE APPLICATIONS PAGE -----	18
FIGURE 20: EXAMPLE OF ADDITIONAL LINKS FOR CCM-UI-----	19
FIGURE 21: ASCENDING/DESCENDING FILTER ARROW-----	19
FIGURE 22: TOGGLE DENSITY BUTTON -----	20
FIGURE 23: ROWS PER PAGE OPTION -----	20
FIGURE 24: GRID NAVIGATION-----	21
FIGURE 25: SHOW/HIDE COLUMNS BUTTON -----	21
FIGURE 26: ACTIVE COLUMN SLIDER EXAMPLE -----	22
FIGURE 27: HIDDEN COLUMN SLIDER EXAMPLE -----	22
FIGURE 28: HIDE ALL BUTTON -----	23
FIGURE 29: SHOW ALL BUTTON -----	23
FIGURE 30: SHOW/HIDE FILTER OPTIONS BUTTONS -----	23
FIGURE 31: EXAMPLE OF FILTER SEARCH MENU ON GRID VIEW -----	24
FIGURE 32: EXAMPLE OF FILTERED RESULTS IN GRID VIEW -----	24
FIGURE 33: CLEARING FILTER BUTTON -----	24
FIGURE 34: SELECTING SHOW/HIDE FILTERS BUTTON TO HIDE FILTER MENU -----	25
FIGURE 35: SHOW/HIDE SEARCH BUTTON-----	25
FIGURE 36: HIGHLIGHTED SEARCH EXAMPLE -----	26
FIGURE 37: CLEAR BUTTON FOR SEARCH BAR -----	26
FIGURE 38: CLINIC CONFIGURATIONS TAB -----	27
FIGURE 39: SEARCH BAR FOR CLINIC CONFIGURATIONS-----	27
FIGURE 40: ERROR MESSAGE WHEN SEARCHING FOR A CLINIC -----	27
FIGURE 41: CLINIC CONFIGURATIONS GRID TABLE -----	28
FIGURE 42: CLINIC CONFIGURATIONS ACCORDIONS-----	28
FIGURE 43: VIEW CLINIC DATA BUTTON -----	29
FIGURE 44: CLINIC SETTINGS VIEW -----	29
FIGURE 45: PRESELECTED SETTINGS VIEW -----	30
FIGURE 46: OPTIONAL SETTINGS VIEW-----	31
FIGURE 47: VIEWING CLINIC AVAILABILITY CALENDAR BUTTON -----	31
FIGURE 48: VIEWING CLINIC AVAILABILITY SEARCH BUTTON -----	32
FIGURE 49: VIEWING CLINIC AVAILABILITY TIMESLOTS EXAMPLE-----	32
FIGURE 50: VIEWING CLINIC AVAILABILITY TIMESLOT PAGE VIEW OPTIONS -----	32
FIGURE 51: VIEWING CLINIC AVAILABILITY FILTER DATES BUTTON-----	33
FIGURE 52: VIEWING CLINIC AVAILABILITY FILTER DATE RANGE EXAMPLE -----	33
FIGURE 53: AUTHORIZATION ERROR MESSAGE FOR CLINIC CONFIGURATIONS-----	34
FIGURE 54: EDIT CLINIC PAGE-----	34
FIGURE 55: EDITING CLINIC AVAILABILITY ACCORDIONS -----	35
FIGURE 56: EDITING MANDATORY FIELDS-----	35
FIGURE 57: UPDATE CLINIC BUTTON FOR MANDATORY FIELDS -----	36
FIGURE 58: CHANGES UNSAVED MESSAGE FOR MANDATORY FIELDS-----	36
FIGURE 59: EDITING PRESELECTED DEFAULT FIELDS-----	37
FIGURE 60: UPDATE CLINIC BUTTON FOR PRESELECTED DEFAULT FIELDS -----	38
FIGURE 61: CHANGES UNSAVED MESSAGE FOR PRESELECTED DEFAULT FIELDS-----	38

FIGURE 62: EDITING OPTIONAL FIELDS	39
FIGURE 63: UPDATE CLINIC BUTTON FOR OPTIONAL FIELDS	40
FIGURE 64: CHANGES UNSAVED MESSAGE FOR OPTIONAL FIELDS	40
FIGURE 65: TIMESLOT MANAGER BUTTON ON CLINIC AVAILABILITY ACCORDION	41
FIGURE 66: CALENDAR BUTTON FOR EDITING CLINIC AVAILABILITY	41
FIGURE 67: AVAILABLE TIMESLOTS EXAMPLE FOR EDITING CLINIC AVAILABILITY	42
FIGURE 68: TIMESLOT MANAGER BUTTON FOR EDITING CLINIC AVAILABILITY FOR SINGLE MODIFICATION	42
FIGURE 69: TIMESLOT MANAGER PAGE FOR SINGLE DAY	43
FIGURE 70: ADD GRID AVAILABILITY RADIO BUTTON FOR SINGLE DAY MODIFICATION	44
FIGURE 71: CALENDAR FOR ADDING GRID AVAILABILITY IN SINGLE DAY MODIFICATION	45
FIGURE 72: CHECK FOR CANCELLED TIMESLOTS BUTTON FOR SINGLE DAY MODIFICATION	46
FIGURE 73: CANCELLED TIMESLOT INFORMATION FOR SINGLE DAY	47
FIGURE 74: ADD TIMESLOTS FOR SINGLE DAY MODIFICATION	47
FIGURE 75: CANCELLED TIMESLOTS INFORMATION FOR SINGLE DAY MODIFICATION	48
FIGURE 76: ADDING MULTIPLE TIMESLOTS IN SINGLE DAY MODIFICATION	49
FIGURE 77: DUPLICATE TIMESLOT ERROR FOR SINGLE DAY MODIFICATION	49
FIGURE 78: OVERLAP TIMESLOT ERROR FOR SINGLE DAY MODIFICATION	50
FIGURE 79: REMOVING TIMESLOTS FOR SINGLE DAY MODIFICATION	50
FIGURE 80: REVIEW CHANGES BUTTON FOR SINGLE DAY MODIFICATION	51
FIGURE 81: REVIEW PAGE FOR ADDING SINGLE DAY TIMESLOTS	52
FIGURE 82: SAVE SUCCESSFUL MESSAGE FOR SINGLE DAY MODIFICATION	53
FIGURE 83: REMOVE GRID AVAILABILITY RADIO BUTTON FOR SINGLE DAY MODIFICATION	54
FIGURE 84: CALENDAR FOR REMOVING GRID AVAILABILITY IN SINGLE DAY MODIFICATION	55
FIGURE 85: REVIEW CHANGES BUTTON FOR REMOVING SINGLE DAY MODIFICATION	56
FIGURE 86: REVIEW PAGE FOR REMOVING SINGLE DAY TIMESLOTS	57
FIGURE 87: SAVE SUCCESSFUL FOR REMOVE TIMESLOT(S) IN SINGLE DAY MODIFICATION	58
FIGURE 88: TIMESLOT MANAGER BUTTON FOR ADDING CLINIC AVAILABILITY FOR INDEFINITE MODIFICATION	58
FIGURE 89: TIMESLOT MANAGER PAGE FOR INDEFINITE MODIFICATION	59
FIGURE 90: ADD GRID AVAILABILITY RADIO BUTTON FOR INDEFINITE MODIFICATION	60
FIGURE 91: CALENDAR FOR ADD GRID AVAILABILITY IN INDEFINITE MODIFICATION	61
FIGURE 92: CHECK FOR CANCELLED TIMESLOTS FOR INDEFINITE MODIFICATION	62
FIGURE 93: CANCELLED TIMESLOT INFORMATION FOR INDEFINITE	63
FIGURE 94: ADD TIMESLOT FOR INDEFINITE MODIFICATION	63
FIGURE 95: CANCELLED TIMESLOTS INFORMATION FOR INDEFINITE MODIFICATION	64
FIGURE 96: ADDING MULTIPLE TIMESLOTS FOR INDEFINITE MODIFICATION	65
FIGURE 97: DUPLICATE TIMESLOT ERROR FOR INDEFINITE MODIFICATION	65
FIGURE 98: OVERLAP TIMESLOT ERROR FOR INDEFINITE MODIFICATION	66
FIGURE 99: REMOVING TIMESLOTS FOR INDEFINITE MODIFICATION	66
FIGURE 100: REVIEW CHANGES BUTTON FOR INDEFINITE MODIFICATION	67
FIGURE 101: REVIEW PAGE FOR ADDING INDEFINITE TIMESLOTS	68
FIGURE 102: SAVE SUCCESSFUL MESSAGE FOR INDEFINITE MODIFICATION	69
FIGURE 103: REMOVE GRID AVAILABILITY RADIO BUTTON FOR INDEFINITE MODIFICATION	70
FIGURE 104: CALENDAR FOR REMOVING GRID AVAILABILITY IN INDEFINITE MODIFICATION	71
FIGURE 105: OPTION TO REMOVE DAY INDEFINITELY FOR INDEFINITE MODIFICATION	72
FIGURE 106: CHOOSING MULTIPLE DAYS TO REMOVE IN INDEFINITE MODIFICATION	72
FIGURE 107: REVIEW CHANGES BUTTON FOR REMOVING INDEFINITE TIMESLOTS	73
FIGURE 108: REVIEW PAGE FOR REMOVING INDEFINITE TIMESLOTS	74
FIGURE 109: SAVE SUCCESSFUL FOR REMOVE TIMESLOT(S) IN INDEFINITE MODIFICATION	75
FIGURE 110: TIMESLOT MANAGER BUTTON FOR EDITING CLINIC AVAILABILITY FOR MULTI-SELECT	75
FIGURE 111: TIMESLOT MANAGER PAGE FOR MULTI-SELECT MODIFICATION	76
FIGURE 112: ADD GRID AVAILABILITY RADIO BUTTON FOR MULTI-SELECT MODIFICATION	77
FIGURE 113: CALENDAR FOR MULTI-SELECT MODIFICATION	78
FIGURE 114: INVALID DATE FORMAT ERROR	78

FIGURE 115: CHECK FOR CANCELLED TIMESLOTS BUTTON FOR MULTI-SELECT MODIFICATION	79
FIGURE 116: BULK PASTE EXAMPLE FOR MULTI-SELECT TIMESLOTS	80
FIGURE 117: CANCELLED TIMESLOT INFORMATION FOR MULTI-SELECT	80
FIGURE 118: ADD TIMESLOT FOR MULTI-SELECT MODIFICATION	81
FIGURE 119: CANCELLED TIMESLOTS INFORMATION FOR MULTI-SELECT MODIFICATION	82
FIGURE 120: ADDING MULTIPLE TIMESLOTS IN MULTI-SELECT MODIFICATION	83
FIGURE 121: DUPLICATE TIMESLOT ERROR FOR MULTI-SELECT MODIFICATION	83
FIGURE 122: OVERLAP TIMESLOT ERROR FOR MULTI-SELECT MODIFICATION	84
FIGURE 123: REMOVING TIMESLOTS FOR MULTI-SELECT MODIFICATION	84
FIGURE 124: REVIEW CHANGES BUTTON FOR MULTI-SELECT MODIFICATION	85
FIGURE 125: REVIEW PAGE FOR ADDING MULTI-SELECT TIMESLOTS	86
FIGURE 126: SAVE SUCCESSFUL MESSAGE FOR MULTI-SELECT MODIFICATION	87
FIGURE 127: REMOVE GRID AVAILABILITY RADIO BUTTON FOR MULTI-SELECT MODIFICATION	88
FIGURE 128: CALENDAR FOR REMOVING GRID AVAILABILITY IN MULTI-SELECT MODIFICATION	89
FIGURE 129: REVIEW CHANGES BUTTON FOR REMOVING MULTI-SELECT TIMESLOTS	90
FIGURE 130: BULK PASTE EXAMPLE FOR REMOVING MULTI-SELECT TIMESLOTS	91
FIGURE 131: REVIEW PAGE FOR REMOVING MULTI-SELECT TIMESLOTS	92
FIGURE 132: SAVE SUCCESSFUL FOR REMOVE TIMESLOT(S) IN MULTI-SELECT MODIFICATION	93
FIGURE 133: TIMESLOT MANAGER BUTTON FOR EDITING CLINIC AVAILABILITY FOR RECURRING	93
FIGURE 134: TIMESLOT MANAGER PAGE FOR RECURRING MODIFICATION	94
FIGURE 135: ADD GRID AVAILABILITY RADIO BUTTON FOR RECURRING MODIFICATION	95
FIGURE 136: CALENDAR DROPDOWN FOR RECURRING MODIFICATION	96
FIGURE 137: CHECK FOR CANCELLED TIMESLOTS BUTTON FOR RECURRING MODIFICATION	96
FIGURE 138: CANCELLED TIMESLOT INFORMATION FOR RECURRING	97
FIGURE 139: RECURRENCE PATTERN DROPDOWN	97
FIGURE 140: EXAMPLE OF MONTHLY RECURRENCE PATTERN	98
FIGURE 141: EXAMPLE OF WEEKLY RECURRENCE PATTERN	98
FIGURE 142: ADD TIMESLOT FOR RECURRING MODIFICATION	99
FIGURE 143: CANCELLED TIMESLOTS INFORMATION FOR RECURRING MODIFICATION	100
FIGURE 144: ADDING MULTIPLE TIMESLOTS IN RECURRING MODIFICATION	100
FIGURE 145: DUPLICATE TIMESLOT ERROR FOR RECURRING MODIFICATION	101
FIGURE 146: OVERLAP TIMESLOT ERROR FOR RECURRING MODIFICATION	101
FIGURE 147: REMOVING TIMESLOTS FOR RECURRING MODIFICATION	101
FIGURE 148: REVIEW CHANGES BUTTON FOR RECURRING MODIFICATION	102
FIGURE 149: REVIEW PAGE FOR ADDING RECURRING TIMESLOTS	103
FIGURE 150: SAVE SUCCESSFUL MESSAGE FOR RECURRING MODIFICATION	104
FIGURE 151: REMOVE GRID AVAILABILITY RADIO BUTTON FOR RECURRING MODIFICATION	105
FIGURE 152: CALENDAR DROPDOWN FOR REMOVING GRID AVAILABILITY IN RECURRING MODIFICATION	106
FIGURE 153: RECURRENCE PATTERN DROPDOWN FOR REMOVING GRID AVAILABILITY	107
FIGURE 154: EXAMPLE OF MONTHLY RECURRENCE PATTERN FOR REMOVING GRID AVAILABILITY	107
FIGURE 155: EXAMPLE OF WEEKLY RECURRENCE PATTERN FOR REMOVING GRID AVAILABILITY	107
FIGURE 156: REVIEW CHANGES BUTTON FOR REMOVING RECURRING TIMESLOTS	108
FIGURE 157: REVIEW PAGE FOR REMOVING RECURRING TIMESLOTS	109
FIGURE 158: SAVE SUCCESSFUL FOR REMOVE TIMESLOT(S) IN RECURRING MODIFICATION	110
FIGURE 159: CANCEL AND RESTORE BUTTONS FOR TIMESLOTS	110
FIGURE 160: DATE SEARCH FOR CANCEL AND RESTORE	111
FIGURE 161: CANCEL TIMESLOT BUTTON	111
FIGURE 162: CANCEL TIMESLOT WINDOW	112
FIGURE 163: SINGLE TIMESLOT CANCELLATION OPTION	112
FIGURE 164: MANUAL TIME ENTERED FOR TIMESLOT CANCELLATION EXAMPLE	113
FIGURE 165: REASON FOR CANCELLATION EXAMPLE FOR SINGLE TIMESLOT CANCELLATION	113
FIGURE 166: REASON FOR CANCELLATION ERROR FOR SINGLE TIMESLOT CANCELLATION	114
FIGURE 167: PATIENT ASSOCIATION WINDOW FOR SINGLE TIMESLOT CANCELLATION	114

FIGURE 168: SAVE SUCCESSFUL FOR CANCELLING SINGLE TIMESLOT	115
FIGURE 169: SINGLE TIMESLOT CANCELLATION EXAMPLE IN GRID	115
FIGURE 170: ENTIRE DAY TIMESLOT CANCELLATION OPTION	116
FIGURE 171: REASON FOR CANCELLATION EXAMPLE FOR ENTIRE DAY CANCELLATION	116
FIGURE 172: REASON FOR CANCELLATION ERROR FOR ENTIRE DAY CANCELLATION	117
FIGURE 173: PATIENT ASSOCIATION WINDOW FOR ENTIRE DAY TIMESLOTS CANCELLATION	117
FIGURE 174: SAVE SUCCESSFUL FOR CANCELLING ALL TIMESLOTS	118
FIGURE 175: ENTIRE DAY TIMESLOT CANCELLATION EXAMPLE IN GRID	118
FIGURE 176: RESTORE TIMESLOT BUTTON FOR SINGLE TIMESLOT RESTORATION	118
FIGURE 177: RESTORE TIMESLOT WINDOW FOR SINGLE TIMESLOT	119
FIGURE 178: RESTORE TIMESLOT(S) BUTTON FOR SINGLE DAY TIMESLOT	119
FIGURE 179: SAVE SUCCESSFUL WINDOW FOR SINGLE TIMESLOT RESTORATION	120
FIGURE 180: RESTORE TIMESLOT BUTTON FOR ENTIRE DAY RESTORATION	120
FIGURE 181: RESTORE TIMESLOT WINDOW FOR ENTIRE DAY TIMESLOTS RESTORATION	120
FIGURE 182: SAVE SUCCESSFUL WINDOW FOR ENTIRE DAY TIMESLOTS RESTORATION	121
FIGURE 183: AUTHORIZATION ERROR MESSAGE FOR CREATING A CLINIC	121
FIGURE 184: CREATE A CLINIC BUTTON	122
FIGURE 185: CREATE A CLINIC ACCORDIONS	122
FIGURE 186: CREATE A CLINIC BUTTON AFTER ENTERING REQUIRED INFORMATION	123
FIGURE 187: EDITING MANDATORY FIELDS FOR CREATE A CLINIC	124
FIGURE 188: ERROR MESSAGE FROM LACK OF REQUIRED FIELDS	124
FIGURE 189: EDITING PRESELECTED DEFAULT FIELDS FOR CREATE A CLINIC	125
FIGURE 190: EDITING OPTIONAL FIELDS FOR CREATE A CLINIC	126
FIGURE 191: INACTIVATE CLINIC BUTTON	127
FIGURE 192: CLINIC SEARCH EXAMPLE FOR INACTIVATING A CLINIC	127
FIGURE 193: ERROR MESSAGE FOR INACTIVATING A CLINIC	127
FIGURE 194: INACTIVATE CLINIC BUTTON FOR INACTIVATING A CLINIC	128
FIGURE 195: INACTIVATE DATE POP-UP	128
FIGURE 196: INACTIVATE STATUS DATE	129
FIGURE 197: CLINIC IS INACTIVE MESSAGE	129
FIGURE 198: CLINIC SEARCH EXAMPLE FOR REACTIVATING A CLINIC	130
FIGURE 199: REACTIVATE CLINIC BUTTON	130
FIGURE 200: REACTIVATE CLINIC POP-UP	131
FIGURE 201: CALENDAR BUTTON FOR REACTIVATING A CLINIC	131
FIGURE 202: PROVIDER FIELD FOR REACTIVATING A CLINIC	132
FIGURE 203: CONFIRMATION CHECKBOX FOR REACTIVATING A CLINIC	132
FIGURE 204: REACTIVATE CLINIC BUTTON	133
FIGURE 205: AUTHORIZATION ERROR MESSAGE FOR REPLICATING A CLINIC	134
FIGURE 206: CLINIC ACTIONS BUTTON FOR REPLICATING A CLINIC	134
FIGURE 207: REPLICATE CLINIC OPTION FROM THE CLINIC ACTION MENU	135
FIGURE 208: EXAMPLE OF AUTO-POPULATED FIELDS FOR REPLICATING A CLINIC	135
FIGURE 209: REPLICATE CLINIC ACCORDIONS	136
FIGURE 210: CLINIC AVAILABILITY NOT REPLICATED NOTIFICATION	136
FIGURE 211: REPLICATE CLINIC BUTTON AFTER ENTERING REQUIRED INFORMATION	137
FIGURE 212: UNABLE TO REPLICATE CLINIC AVAILABILITY WINDOW	138
FIGURE 213: CLINIC SUCCESSFULLY REPLICATED WINDOW	138
FIGURE 214: CLINIC AUDIT REPORT TAB	139
FIGURE 215: CCM CLINIC AUDIT REPORT HOMEPAGE	140
FIGURE 216: CLINIC MODIFICATION TRENDS	140
FIGURE 217: FILTER OPTIONS	141
FIGURE 218: RESET FILTERS BUTTON	141
FIGURE 219: EXAMPLE OF CHOOSING FILTER SELECTION	142
FIGURE 220: EXAMPLE OF FILTER SELECTION DROPDOWN	142

FIGURE 221: CALENDAR BUTTON FOR ENTER START DATE	143
FIGURE 222: CALENDAR BUTTON FOR ENTER END DATE	143
FIGURE 223: EXPORT BUTTON FOR CLINIC AUDIT REPORT	143
FIGURE 224: VIEW EXISTING LETTERS	144
FIGURE 225: LETTERS TAB	144
FIGURE 226: CREATE LETTER BUTTON ON THE LETTERS PAGE	145
FIGURE 227: EXAMPLE OF LETTER	145
FIGURE 228: CREATE LETTER BUTTON ON THE CREATE NEW LETTER PAGE	146
FIGURE 229: SEARCH BUTTON FOR VIEWING LETTERS	146
FIGURE 230: VIEW LETTER BUTTON FROM ACTION MENU	146
FIGURE 231: VIEW LETTER PAGE EXAMPLE	147
FIGURE 232: SEARCH BUTTON FOR EDITING LETTERS	148
FIGURE 233: EDIT LETTER BUTTON FROM THE ACTION MENU	148
FIGURE 234: EDIT LETTER PAGE	149
FIGURE 235: SAVE CHANGES BUTTON FOR EDIT LETTER PAGE	149
FIGURE 236: SEARCH BUTTON FOR DELETING LETTERS	150
FIGURE 237: DELETE LETTER BUTTON FROM THE ACTION MENU	150
FIGURE 238: DELETE LETTER BUTTON	151
FIGURE 239: VA TOOL SET TAB	151
FIGURE 240: VA TOOL SET ACCORDION VIEW	152
FIGURE 241: VIEWING VETERAN SELF SCHEDULING	152
FIGURE 242: PINNED SERVICES BUTTON FOR VIEWING VA SELF SCHEDULING	153
FIGURE 243: EXPANDED ACCORDIONS OF VIEWING VA SELF SCHEDULING SETTINGS	153
FIGURE 244: AUTHORIZATION ERROR MESSAGE FOR VA SELF SCHEDULING SETTINGS	153
FIGURE 245: EDITING VETERAN SELF SCHEDULING	154
FIGURE 246: PINNED SERVICES BUTTON FOR EDITING VA SELF SCHEDULING	154
FIGURE 247: ACCORDION VIEW OF EDITING VA SELF SCHEDULING SETTINGS	154
FIGURE 248: SAVE BUTTON FOR VA SELF SCHEDULING SETTINGS	155
FIGURE 249: ERROR FIELD FOR SAVING IN VA SELF SCHEDULING	155
FIGURE 250: SAVING IN VA SELF SCHEDULING	156
FIGURE 251: TIME STAMP AFTER SAVING IN VA SELF SCHEDULING	156
FIGURE 252: VIEWING VETERAN APPOINTMENT REQUESTS	157
FIGURE 253: PINNED SERVICES BUTTON FOR VIEWING VA APPOINTMENT REQUESTS	157
FIGURE 254: EXPANDED ACCORDIONS OF VIEWING VA APPOINTMENT REQUESTS	157
FIGURE 255: AUTHORIZATION ERROR MESSAGE FOR VA APPOINTMENT REQUESTS SETTINGS	158
FIGURE 256: VETERAN APPOINTMENT REQUESTS TAB	158
FIGURE 257: PINNED SERVICES BUTTON FOR VA APPOINTMENT REQUESTS	159
FIGURE 258: ACCORDION VIEW OF VA APPOINTMENT REQUESTS	159
FIGURE 259: SAVE BUTTON FOR VA APPOINTMENT REQUESTS SETTINGS	159
FIGURE 260: ERROR FIELD FOR SAVING IN VA APPOINTMENT REQUESTS	160
FIGURE 261: SAVING IN VA APPOINTMENT REQUESTS	160
FIGURE 262: TIME STAMP AFTER SAVING IN VA APPOINTMENT REQUESTS	161
FIGURE 263: ANNUAL CLINIC PROFILE REVIEW TAB	161
FIGURE 264: RUN REPORT BUTTON FOR ANNUAL CLINIC PROFILE REVIEW	161
FIGURE 265: DOWNLOAD LINK FOR ANNUAL CLINIC PROFILE REVIEW	162
FIGURE 266: NO RESULTS FOUND NOTIFICATION FOR ANNUAL CLINIC PROFILE REVIEW	162
FIGURE 267: RESOURCE INFORMATION LINK FOR ANNUAL CLINIC PROFILE REVIEW	162
FIGURE 268: 500 ERROR MESSAGE FOR CONNECTION	168
FIGURE 269: 500 ERROR MESSAGE FOR SERVER ISSUES	169

Table of Tables

TABLE 1: FILTER DESCRIPTIONS FOR CLINIC AUDIT REPORT	141
TABLE 2: TOOL TIP DESCRIPTIONS	163

Revision History

Date	Version	Description	Author
6/4/2026	1.14.0	Updated information for section 4.4	Booz Allen Hamilton
5/11/2026	1.13.0	Updated information on User Preferences and Letters	Booz Allen Hamilton
4/27/2026	1.12.0	Updated UI for Veteran Self Scheduling	Booz Allen Hamilton
3/17/2026	1.11.0	Added information to Letters section, updated outdated information for Clinic Audit Report, updated UI for Editing Timeslots	Booz Allen Hamilton
3/3/2026	1.10.0	Updated UI changes to Multi-select timeslots and Timeslot Recovery	Booz Allen Hamilton
12/4/2025	1.7.0	Updated UI changes to v3, added Letters and Annual Clinic Review Section	Booz Allen Hamilton

1. Introduction

1.1 Overview

The Clinic Configuration Manager User Interface (CCM-UI) is a user friendly, easy to navigate application that will help users View, Edit and Create data attribution changes to and from either the VA Tool Set or VistA systems.

1.2 Prerequisite Credentials

1. The user's PIV card must be linked to the VistA site. (See [link](#) for guidance)
2. After confirming that the user's PIV card is linked to the user's VistA account, the user will be able to sign into the CCM-UI.
3. To access the Clinic Configuration Manager Clinic Audit Report, users will need to be added to the VHACLINICPROFILEMANAGERS@VA.GOV email distribution group.

- ❖ *Note: Users who have not been added to the VHACLINICPROFILEMANAGERS@VA.GOV email distribution group will need to contact their supervisor to be added.*
- ❖ *Note: If a user has not been added to the appropriate email distribution group, the user will receive the following message seen in **Figure 1** below notifying them that the correct access permissions have not been allocated to the account.*

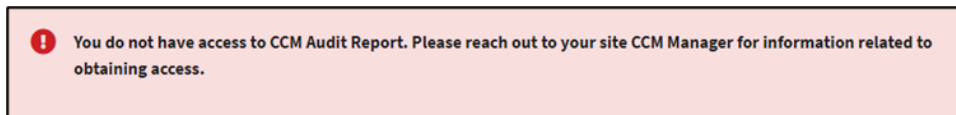


Figure 1: Access Permissions Notification

1.3 PIV Login

1. Begin by opening a browser and going to the following web address: [link](#). The VA Single Sign-On page will then appear. Select the "Sign in with PIV" option, as seen in **Figure 2**, to proceed with the log in process.

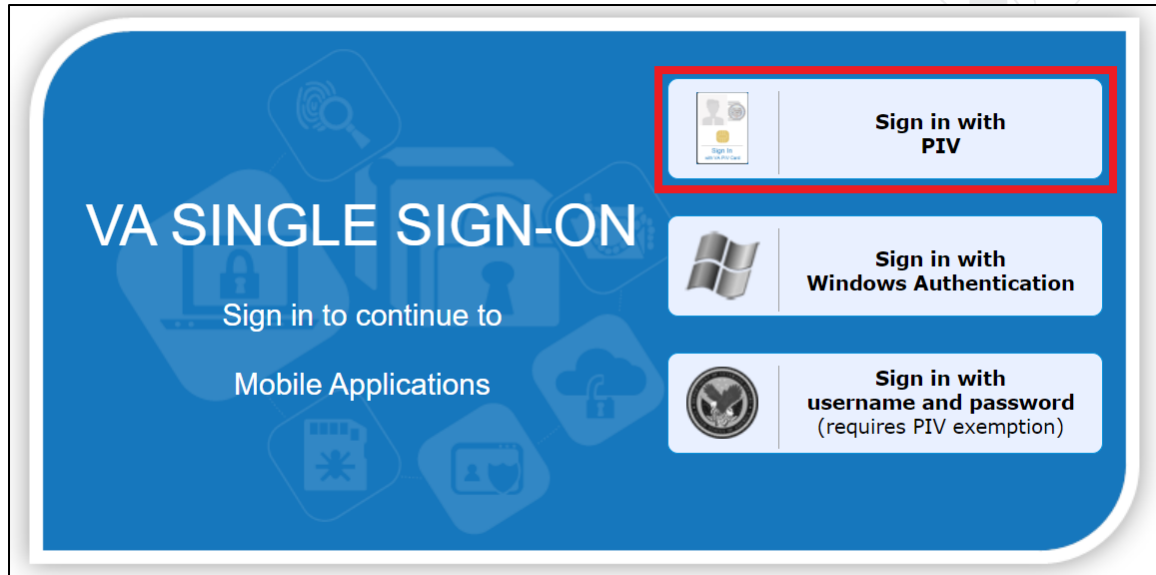


Figure 2: PIV Card Sign-On Image

2. After selecting, an ActivClient Login dialog box will appear to prompt you to enter your PIN. Type the numbers of your PIN as prompted in **Figure 3**. If authentication is successful, CCM-UI will load. If it is not successful, you will be prompted to enter your correct PIN instead.

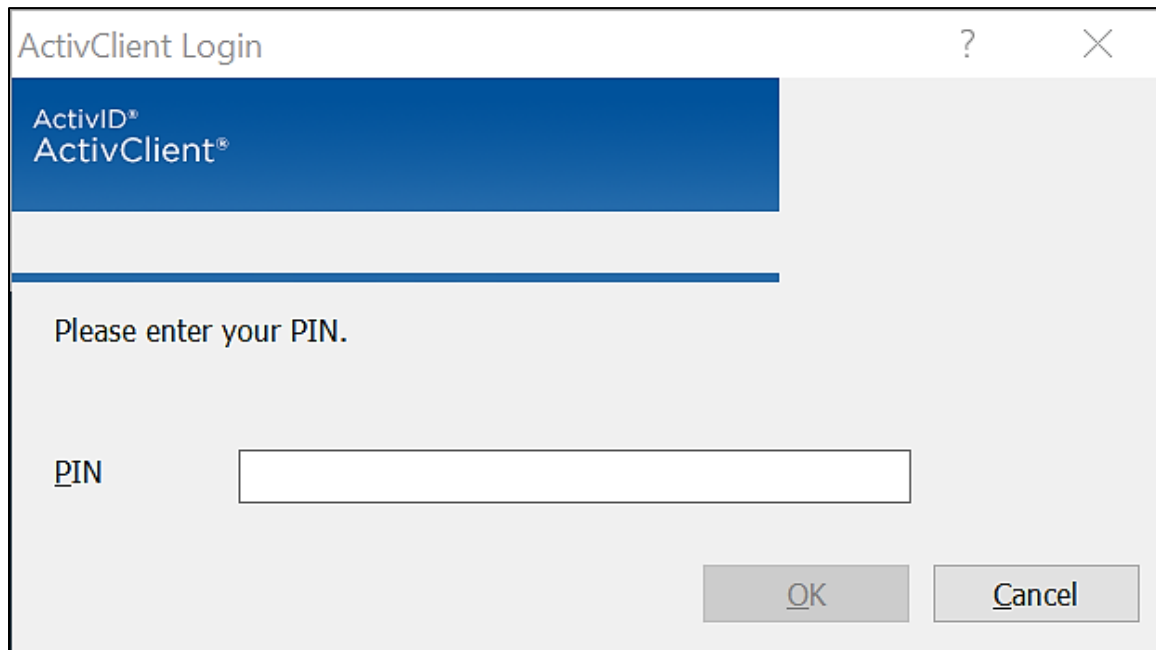
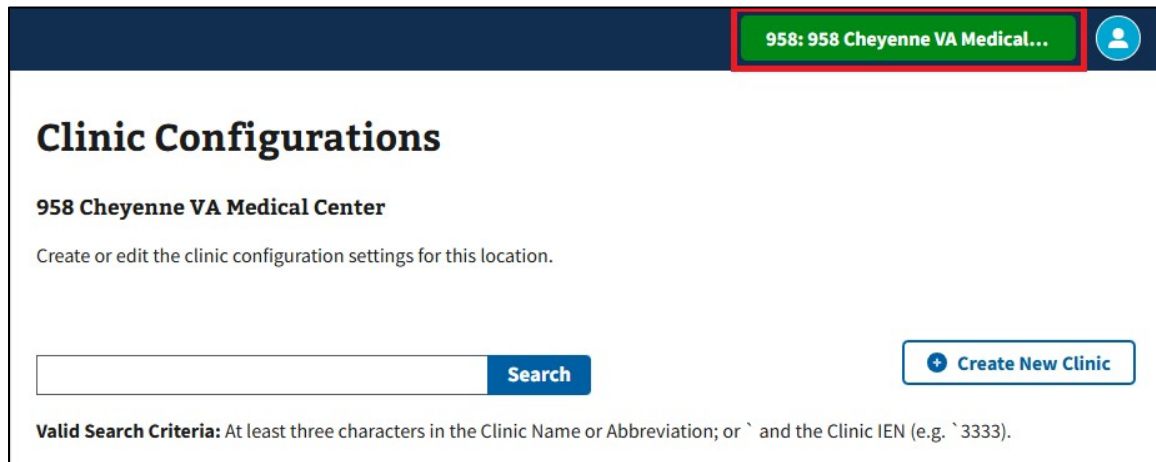


Figure 3: ActivClient Login Pop-Up Window

2. Familiarizing Yourself with CCM-UI

2.1 Changing Site Locations

1. To change site locations, the user must first select the green box in the upper right-hand corner of the page as shown in **Figure 4**.



958: 958 Cheyenne VA Medical...

Clinic Configurations

958 Cheyenne VA Medical Center

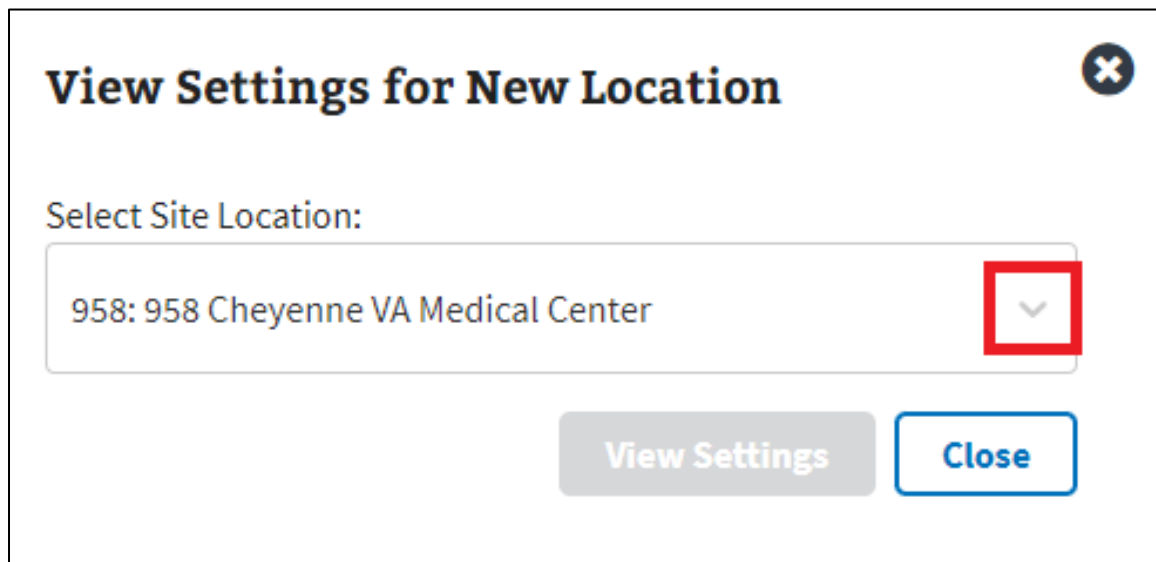
Create or edit the clinic configuration settings for this location.

Search **Create New Clinic**

Valid Search Criteria: At least three characters in the Clinic Name or Abbreviation; or ` and the Clinic IEN (e.g. `3333).

Figure 4: Change Site Locations Buttons

2. The user will then need to select the requested site location by clicking the arrow shown in **Figure 5** if it is not already the default selection.



View Settings for New Location

Select Site Location:

958: 958 Cheyenne VA Medical Center

View Settings **Close**

Figure 5: Change Site Location Accordion

- ❖ **Note:** The user will only see sites that are provisioned to their account after selecting the arrow shown in **Figure 5**. If sites assigned to the user are not shown, please contact the local Clinical Applications Coordinator or Supervisor for assistance.

- The user can then select the button boxed below in **Figure 6** to view the selected settings.

Figure 6: View Settings Button

2.2 My Account

2.2.1 User Preferences

*Disclaimer: The first two sub-sections for User Preferences are only applicable to CCM users with more than one site location provisioned to their account. For users provisioned with only a single site location, please skip to section **2.2.1.3 Default Create New Clinic Accordion Preferences**.*

- To change user preferences, the user can select the “My Account” button in the upper right-hand corner, seen in **Figure 7**, to open the dropdown.

Figure 7: My Account Button for User Preferences

- The user can then select the “Preferences” button shown in **Figure 8** to be taken to the User Preferences page.

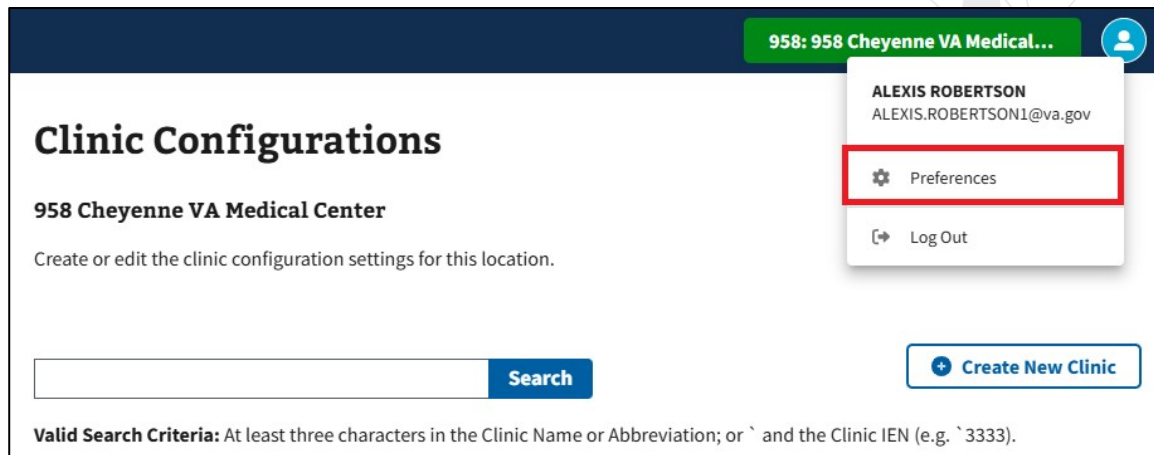


Figure 8: Preferences Button

2.2.1.1 Default Site Location Preferences

1. To adjust the default site location, the user will need to select the arrow, seen in **Figure 9** below, to choose a location from the dropdown.

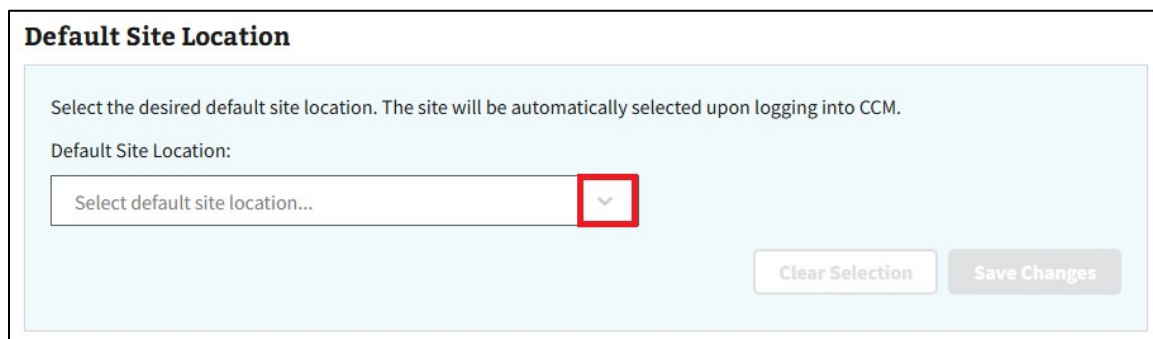


Figure 9: Default Site Location Dropdown Button

2. After selecting a location, the user can then select the “Save” button in **Figure 10** to save the change.

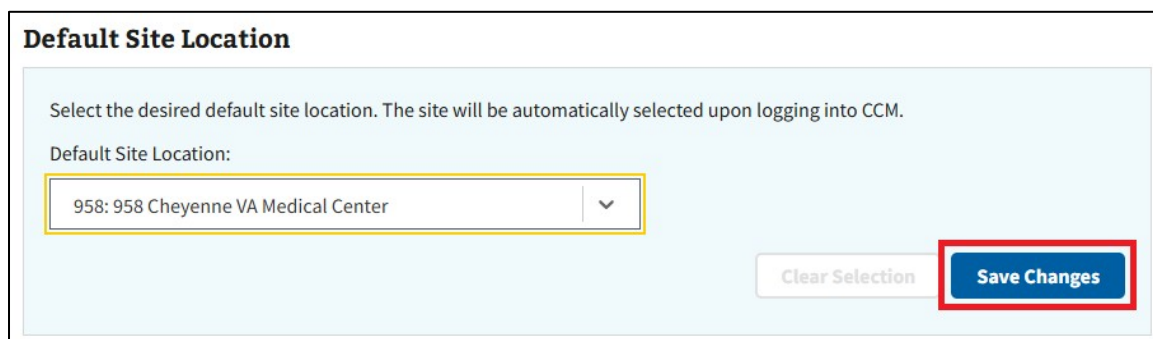


Figure 10: Save Changes Button for Default Site Locations

3. To reset the default location, select the “Clear Selection” button seen in **Figure 11**.

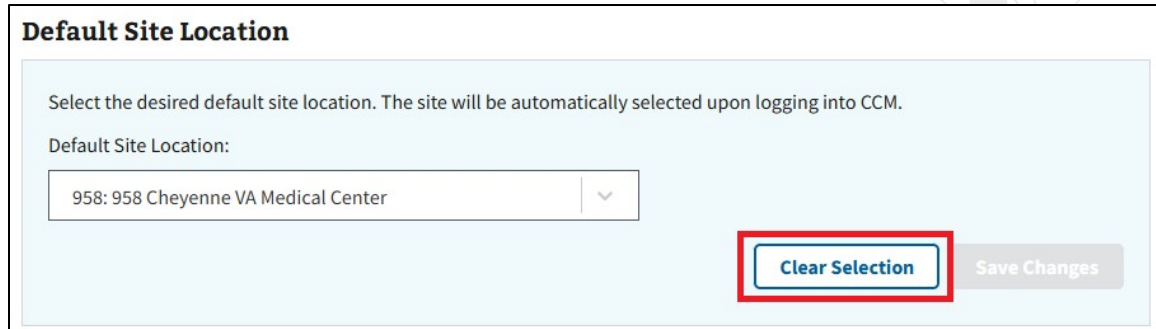


Figure 11: Clear Selection Button for Default Site Location

❖ *Note: User preferences will be reset whenever the user clears their browser cache.*

2.2.1.2 Locations in Site Selector Preferences

1. To change the locations in the site selector, the user will need to select the buttons boxed in **Figure 12**. The user will know that the site is hidden when a “\” displays through the icon as shown in **Figure 13**.

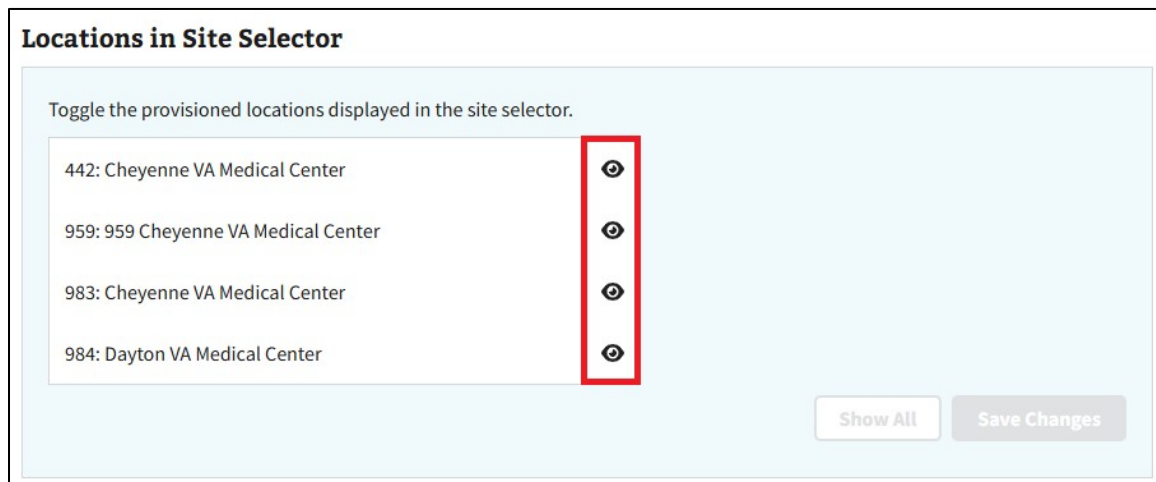


Figure 12: Toggle Button for Locations in Site Selector

2. The user can then select the “Save” button seen in **Figure 13** to save their changes.

Locations in Site Selector

Toggle the provisioned locations displayed in the site selector.

442: Cheyenne VA Medical Center	
959: 959 Cheyenne VA Medical Center	
983: Cheyenne VA Medical Center	
984: Dayton VA Medical Center	

Figure 13: Save Changes Button for Locations in Site Selector

- To reset preferences, select the “Show All” button within the individual sections as seen in **Figure 14**.

Locations in Site Selector

Toggle the provisioned locations displayed in the site selector.

442: Cheyenne VA Medical Center	
959: 959 Cheyenne VA Medical Center	
983: Cheyenne VA Medical Center	
984: Dayton VA Medical Center	

Figure 14: Show All Button for Locations in Site Selector

❖ *Note: User preferences will be reset whenever the user clears their browser cache.*

2.2.1.3 Default Create New Clinic Accordion Preferences

- To adjust the default state of the accordions when creating a new clinic to open, the user will need to select the checkbox shown below in **Figure 15**.

Default Create New Clinic Accordions to Open

When creating a new clinic, automatically expand the accordions to see all fields.

When box is unchecked, accordions will be collapsed by default.

☐ Default all Create New Clinic accordions to open

Figure 15: Checkbox for Default Accordions to Open

- The user can then select the “Save Changes” button, seen in **Figure 16**, to save their new preference.



Figure 16: Save Changes Button for Default Accordions to Open

- To reset the default state of the accordions to collapsed, the user will simply need to uncheck the box and save their changes to confirm.

2.2.2 Logging Out of CCM-UI

- To log out of CCM-UI, the user will need to select the “My Account” button in the upper-right hand corner, as seen in **Figure 17**.

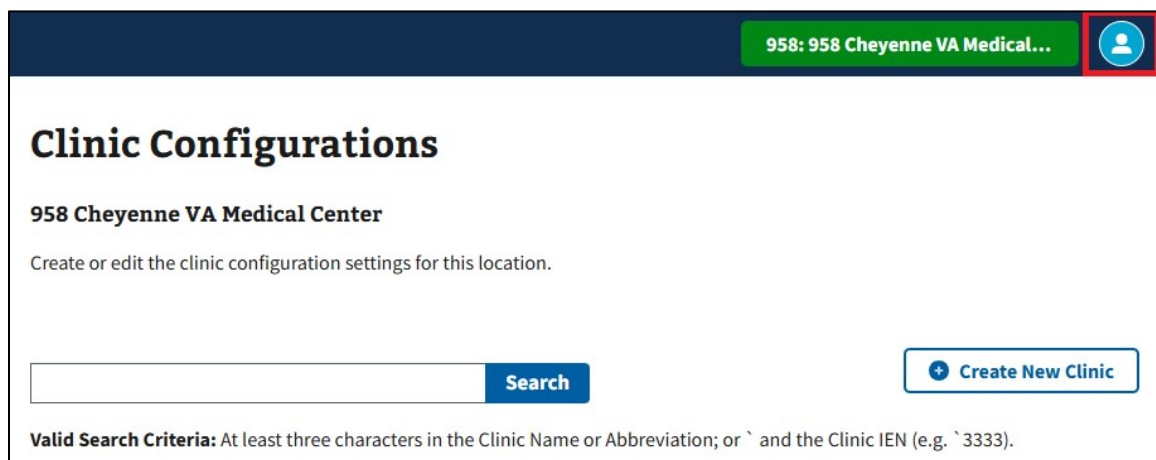


Figure 17: My Account Button for CCM-UI

- The user will then need to select the “Log Out” button from the dropdown menu shown in **Figure 18**.

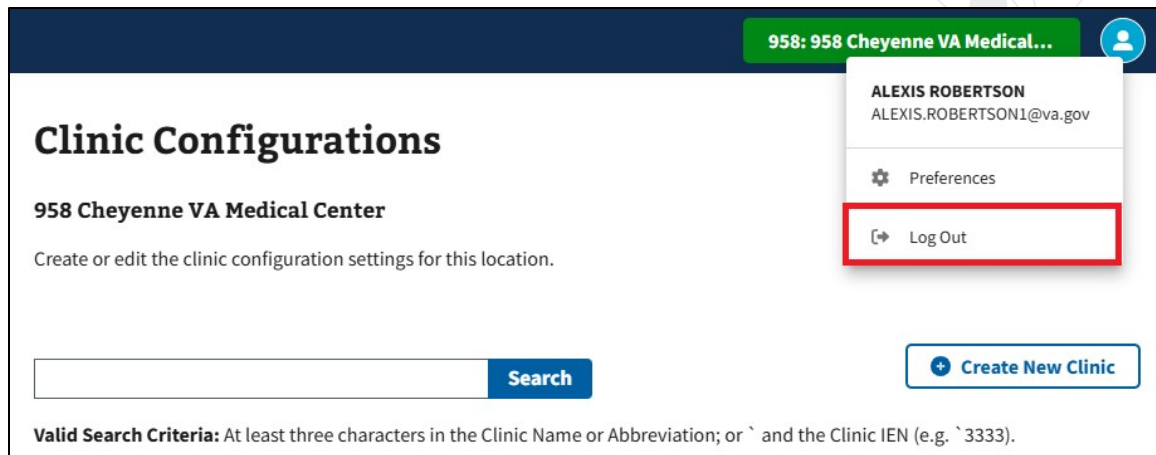


Figure 18: Log Out Button for CCM-UI

3. Upon logging out of the CCM-UI application, the user will be taken to the page seen in **Figure 19** that will prompt them to log out of the VA SSOi and close the browser.

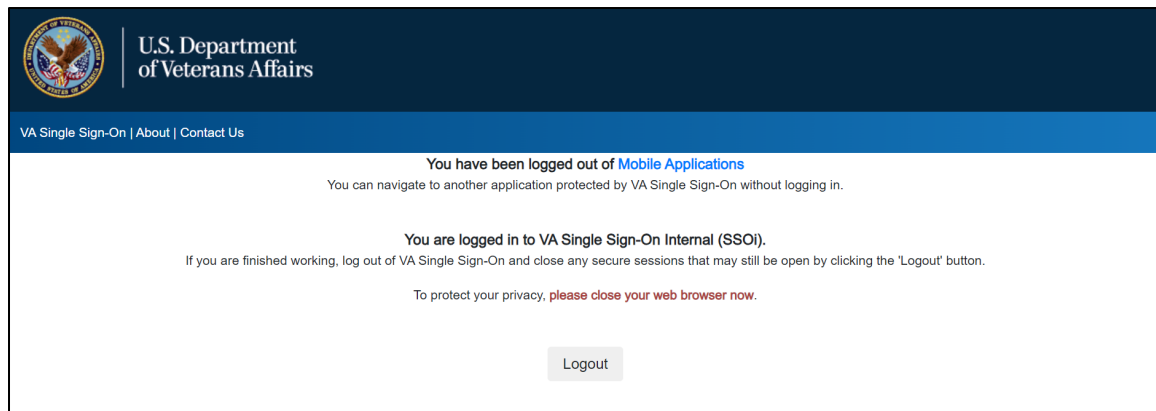


Figure 19: Logged Out of Mobile Applications Page

2.3 Resources

For additional information or help with the CCM-UI application, the user can select the “Resources” tab to the left of the CCM-UI page. See **Figure 20** below for reference.

VA CCM 958: 958 Cheyenne VA Medical...

- Clinic Configurations
- Clinic Audit Report
- Letters
- Veteran Appointment Requests
- Annual Clinic Profile Review
- Resources**

Resources

About

The VA Tool Set provides access to utilities that allow authorized users to configure and support features in mobile apps. The user guide below contains detailed tool instructions.

[Clinic Configuration Manager Business Rules](#)
[Clinic Profile Management Business Rules](#)

Help

If you are having technical problems with this application, please enter a ticket through the YourIT Service Portal or call the VA Help Desk.

Call for Support

VA Help Desk: [1 \(855\) 673-4357](tel:18556734357)
TTY: [1 \(844\) 224-6186](tel:18442246186)
Veterans Crisis Hotline: [1 \(800\) 273-8255](tel:18002738255)

Create YourIT Service Portal Ticket

[YourIT Self Service Portal](#)

Figure 20: Example of Additional Links for CCM-UI

2.4 Filters

2.4.1 Sort by Ascending and Descending

- When looking for clinics within the grid, the user can sort rows by hovering the cursor next to a column's name and selecting the arrow button that appears in **Figure 21**.

Sort by Clinic Name ascending

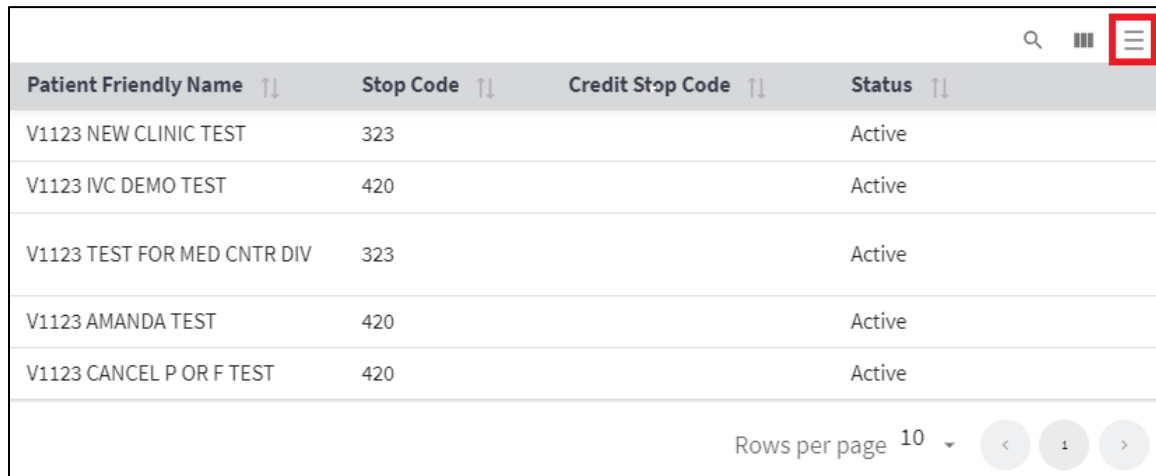
Clinic Name 	Abbreviations 	Provider(s) 
 V1123 NEW CLINIC TEST		User, Test
 V1123 IVC DEMO TEST		User, Test
 V1123 TEST FOR MED CNTR DIV		User, Test
 V1123 AMANDA TEST		User, Test
 V1123 CANCEL P OR F TEST		User, Test

Figure 21: Ascending/Descending Filter Arrow

2. Selecting the arrow once will cause results to sort by ascending order (↑), a second time to sort by descending order (notated by ↓), and a third time to cause results to appear in the default order again (notated with no arrow).

2.4.2 Toggle Density

1. The user has the option to adjust toggle density of the grid. To begin adjusting the toggle density, select the button shown in **Figure 22**.



Patient Friendly Name ↑↓	Stop Code ↑↓	Credit Stop Code ↑↓	Status ↑↓
V1123 NEW CLINIC TEST	323		Active
V1123 IVC DEMO TEST	420		Active
V1123 TEST FOR MED CNTR DIV	323		Active
V1123 AMANDA TEST	420		Active
V1123 CANCEL P OR F TEST	420		Active

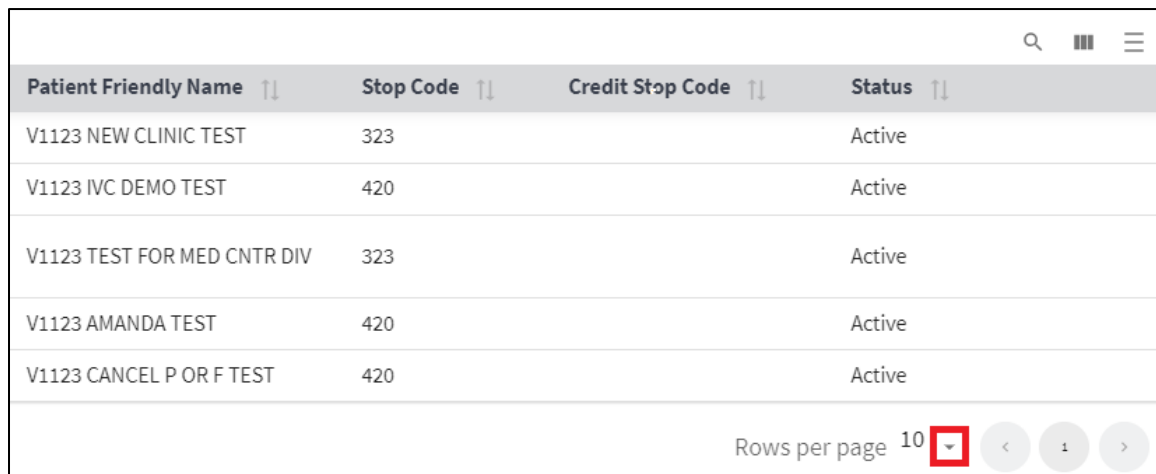
Rows per page 10

Figure 22: Toggle Density Button

2. There are three different options for the user to choose from depending on the user's preference. Simply keep selecting the "Toggle Density" button to rotate through the options until the user finds their preferred density.

2.4.3 Filtering Rows

1. Users can increase or decrease the number of rows shown on the page by selecting the arrow shown in **Figure 23**.

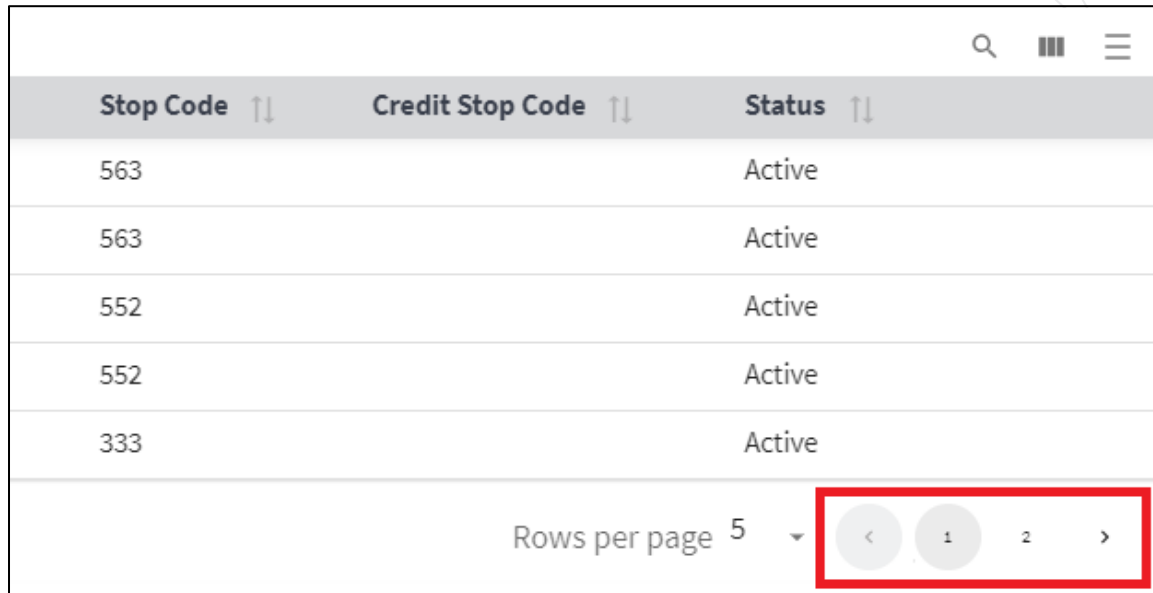


Patient Friendly Name ↑↓	Stop Code ↑↓	Credit Stop Code ↑↓	Status ↑↓
V1123 NEW CLINIC TEST	323		Active
V1123 IVC DEMO TEST	420		Active
V1123 TEST FOR MED CNTR DIV	323		Active
V1123 AMANDA TEST	420		Active
V1123 CANCEL P OR F TEST	420		Active

Rows per page 10

Figure 23: Rows per Page Option

- Users can also navigate the grid to more available clinics by selecting the arrows "<" to navigate one page backwards and ">" to navigate one-page forwards, as seen in **Figure 24**.



Stop Code ↑↓	Credit Stop Code ↑↓	Status ↑↓
563		Active
563		Active
552		Active
552		Active
333		Active

Rows per page 5

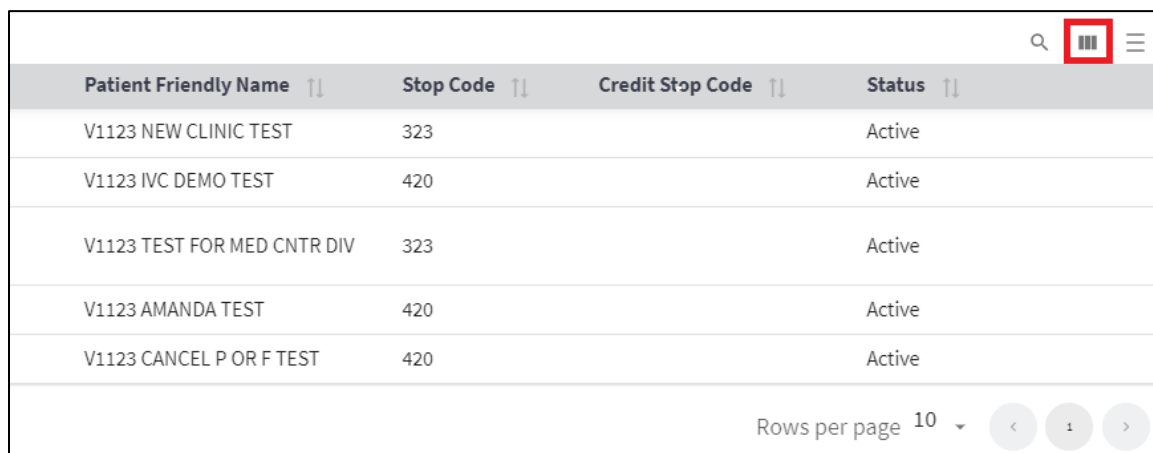
< 1 2 >

Figure 24: Grid Navigation

- ❖ *Note: Arrows will be greyed out and un-selectable if the user cannot navigate in a certain direction.*

2.4.4 Filtering Columns

- Users can filter columns by selecting the three vertical bars pictured in **Figure 25** titled "Show/Hide Columns." This action will cause a dropdown (see **Figure 26**) to appear.



Patient Friendly Name ↑↓	Stop Code ↑↓	Credit Stop Code ↑↓	Status ↑↓
V1123 NEW CLINIC TEST	323		Active
V1123 IVC DEMO TEST	420		Active
V1123 TEST FOR MED CNTR DIV	323		Active
V1123 AMANDA TEST	420		Active
V1123 CANCEL P OR F TEST	420		Active

Rows per page 10

< 1 >

Figure 25: Show/Hide Columns Button

- To hide a column, users will need to select the slider, shown below in **Figure 26**, next to an active column (indicated by slider's blue appearance). The slider will become grey, and the column will be hidden from view within the grid.

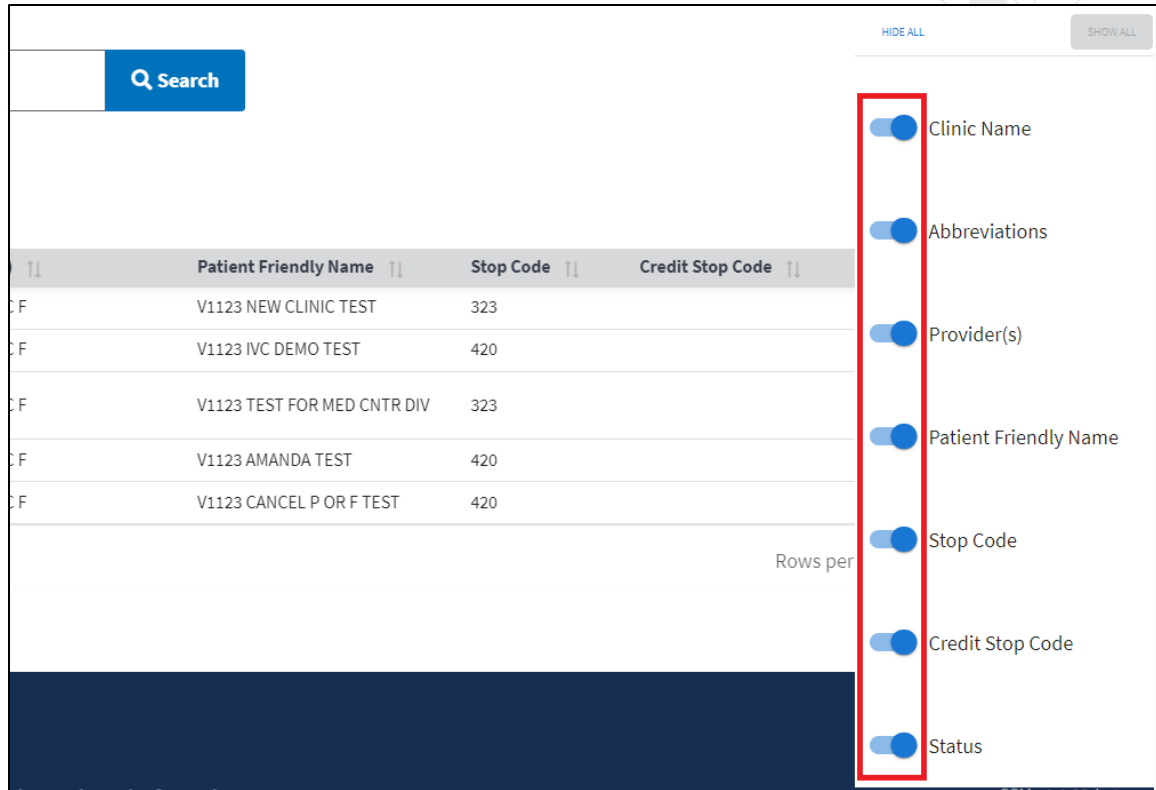


Figure 26: Active Column Slider Example

- To show a column, users will need to select the slider, shown below in **Figure 27**, next to a hidden column (indicated by slider's grey appearance). The slider will then become blue, and the column will be shown within the grid once more.

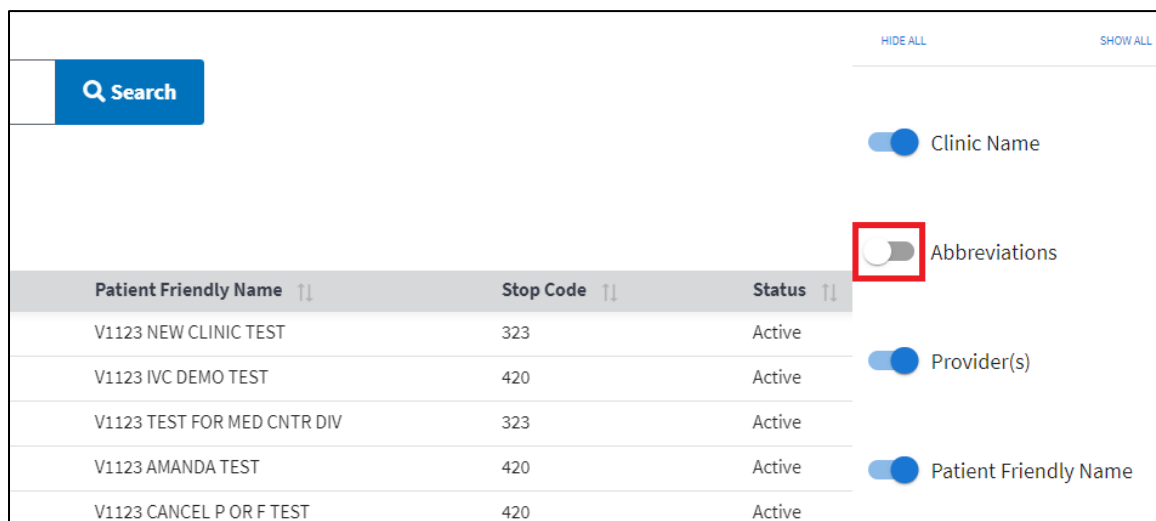


Figure 27: Hidden Column Slider Example

- Optionally, users can choose to hide all columns within the grid at once by selecting the "Hide All" button seen in **Figure 28**.

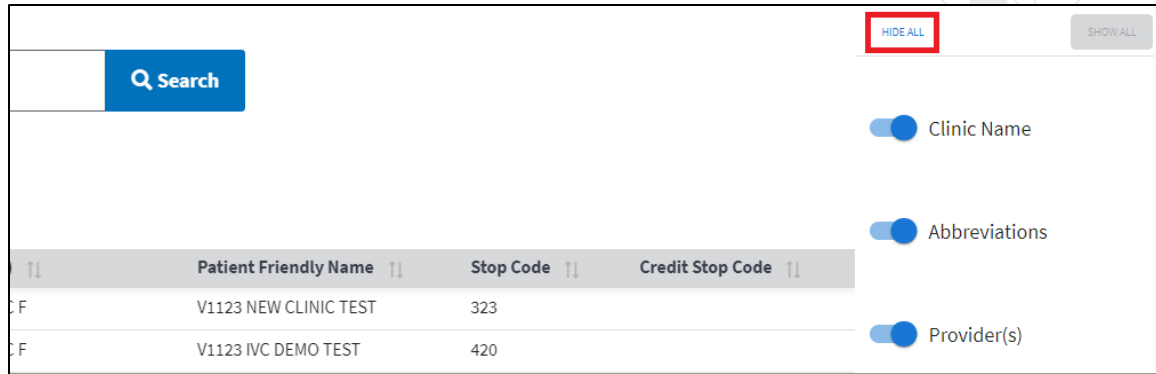


Figure 28: Hide All Button

- Users can also select the “Show All” button seen below in **Figure 29** to show all hidden columns within the grid at one time.

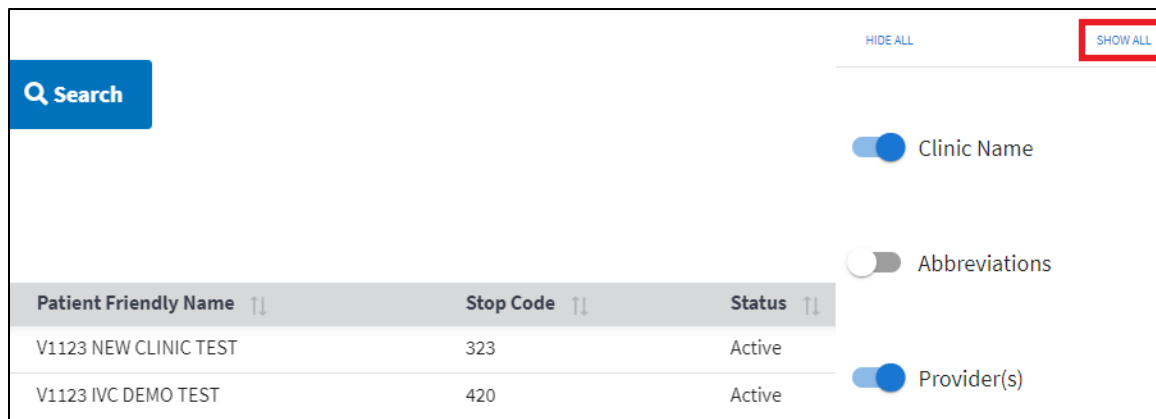


Figure 29: Show All Button

❖ *Note: The “Show All” button will not be selectable until at least one column has been hidden.*

2.4.5 Show, Hide, and Search Filters

- When looking for availability within the grid, the option to show and hide filters is available. To begin the user will need to select the “Show/Hide Filters” button shown in **Figure 30**. Selecting either will cause the search functions to appear under each column name.

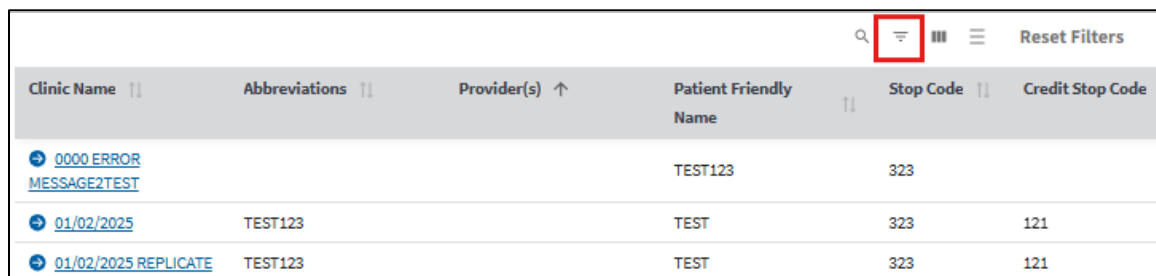


Figure 30: Show/Hide Filter Options Buttons

- Once the search options appear as seen in **Figure 31**, the user can select the search bar or dropdown menu under the desired column to be filtered and enter or select the required information needed.

Clinic Name	Abbreviations	Provider(s)	Patient Friendly Name	Stop Code	Credit Stop Code
0000 ERROR MESSAGE2TEST			TEST123	323	
01/02/2025	TEST123		TEST	323	121
01/02/2025 REPLICATE	TEST123		TEST	323	121

Figure 31: Example of Filter Search Menu on Grid View

- Once the filter field has been populated, results will automatically refresh and show items based on the filtered criteria as seen below in **Figure 32**.

Clinic Name	Abbreviations	Provider(s)	Patient Friendly Name	Stop Code	Credit Stop Code
112TEST CLINIC NAME ENTRY			112TEST CLINIC NAME ENTRY	323	
AUTOMATION TESTING CLINIC			ONLY-AUTO	323	322
CCM TEST CLINIC 1	CCM		CCM	324	

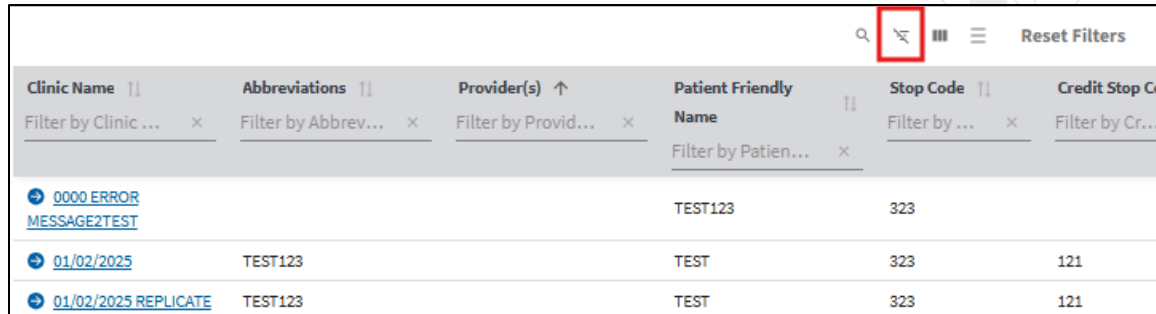
Figure 32: Example of Filtered Results in Grid View

- To clear the search, the user will need to select the “X” next to the search bar seen in **Figure 33**. Selecting this will cause all results to appear within the table.

Clinic Name	Abbreviations	Provider(s)	Patient Friendly Name	Stop Code	Credit Stop Code
112TEST CLINIC NAME ENTRY			112TEST CLINIC NAME ENTRY	323	
AUTOMATION TESTING CLINIC			ONLY-AUTO	323	322
CCM TEST CLINIC 1	CCM		CCM	324	

Figure 33: Clearing Filter Button

- Once finished searching, the user can then select the “Show/Hide Search” button seen in **Figure 34** to hide the search bar.

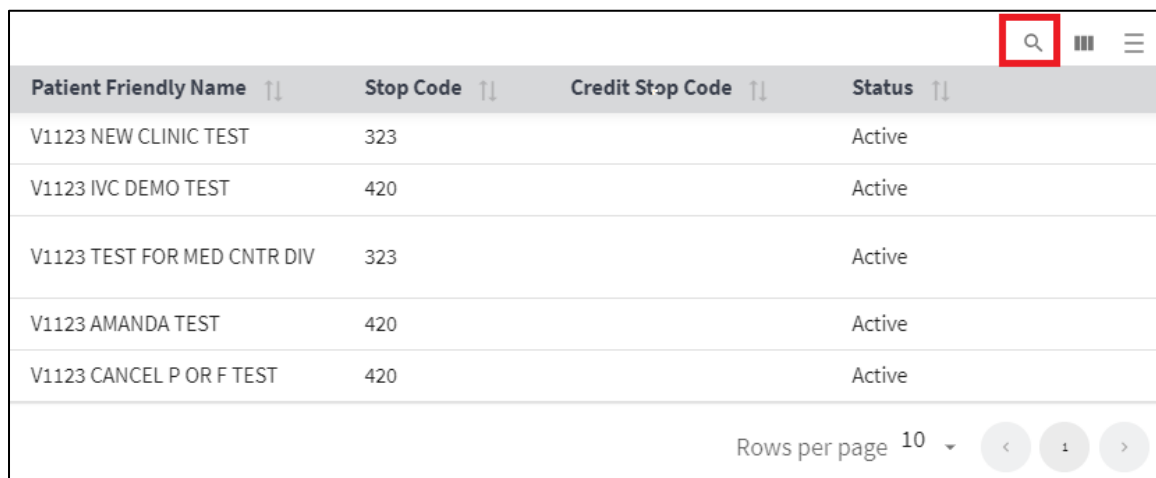


Clinic Name	Abbreviations	Provider(s)	Patient Friendly Name	Stop Code	Credit Stop Code
0000 ERROR MESSAGE2TEST			TEST123	323	
01/02/2025	TEST123		TEST	323	121
01/02/2025 REPLICATE	TEST123		TEST	323	121

Figure 34: Selecting Show/Hide Filters Button to Hide Filter Menu

2.4.6 Search Function

1. The user can search through all items within the grid by selecting the “Show/Hide Search” button seen in **Figure 35**.

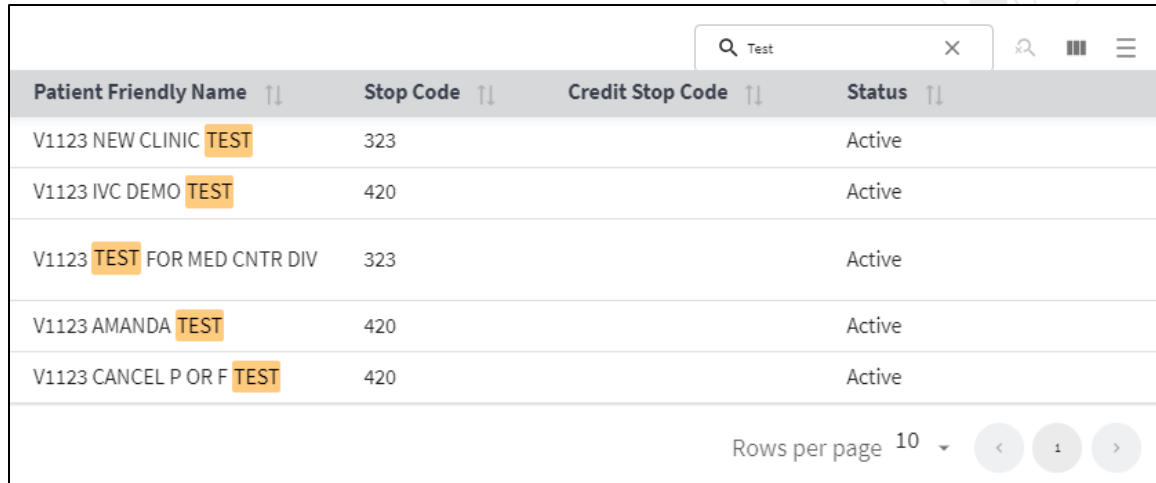


Patient Friendly Name	Stop Code	Credit Stop Code	Status
V1123 NEW CLINIC TEST	323		Active
V1123 IVC DEMO TEST	420		Active
V1123 TEST FOR MED CNTR DIV	323		Active
V1123 AMANDA TEST	420		Active
V1123 CANCEL P OR F TEST	420		Active

Rows per page 10

Figure 35: Show/Hide Search Button

2. The user can then type the requested information into the search function. This will cause matching results to appear automatically highlighted within the grid as shown in **Figure 36**.

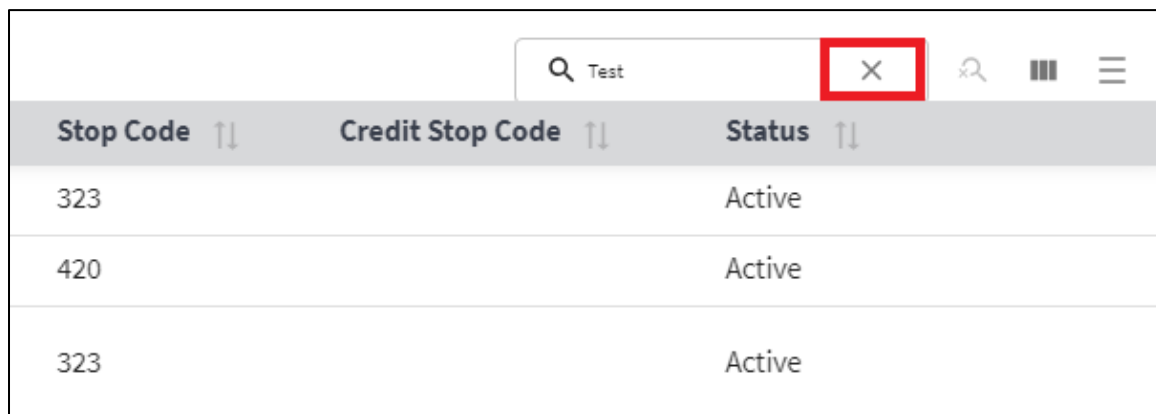


Patient Friendly Name ↑↓	Stop Code ↑↓	Credit Stop Code ↑↓	Status ↑↓
V1123 NEW CLINIC TEST	323		Active
V1123 IVC DEMO TEST	420		Active
V1123 TEST FOR MED CNTR DIV	323		Active
V1123 AMANDA TEST	420		Active
V1123 CANCEL P OR F TEST	420		Active

Rows per page 10

Figure 36: Highlighted Search Example

- To clear the search, the user will need to select the “X” next to the search bar seen in **Figure 37**. Selecting this will cause all results to appear within the grid.



Stop Code ↑↓	Credit Stop Code ↑↓	Status ↑↓
323		Active
420		Active
323		Active

Figure 37: Clear Button for Search Bar

- Once finished searching, the user can then select the “Show/Hide Search” button seen in **Figure 35** above to hide the search bar from view.

3. Search and View Clinic Configurations

Within the Clinic Configuration page, users can search and view clinic configurations for a specific clinic.

❖ *Note: Users with the correct user access will default to edit mode when entering Clinic Configurations.*

3.1 Search for a Clinic Configuration

- Select the “Clinic Configurations” tab shown in **Figure 38**.

VA CCM 958: 958 Cheyenne VA Medical...

Clinic Configurations

958 Cheyenne VA Medical Center

Create or edit the clinic configuration settings for this location.

Search **+ Create New Clinic**

Valid Search Criteria: At least three characters in the Clinic Name or Abbreviation; or ` ` and the Clinic IEN (e.g. `3333).

Figure 38: Clinic Configurations Tab

- To search for a desired clinic, select the search bar shown in **Figure 39**.

VA CCM 958: 958 Cheyenne VA Medical...

Clinic Configurations

958 Cheyenne VA Medical Center

Create or edit the clinic configuration settings for this location.

Search **+ Create New Clinic**

Valid Search Criteria: At least three characters in the Clinic Name or Abbreviation; or ` ` and the Clinic IEN (e.g. `3333).

Figure 39: Search Bar for Clinic Configurations

- A user must enter the first 3+ characters of the clinic name to begin a search.
 - ❖ *Note: Search input must be at least three characters and can only include uppercase or lowercase letters, numbers, spaces, hyphens, and forward slashes. If the user does not adhere to the aforementioned rules, the error message shown in **Figure 40** will appear.*

Search input must be at least three characters.

Search **+ Create New Clinic**

Figure 40: Error Message When Searching for a Clinic

- Once entering a valid search, the user must select enter or select “Search” shown in **Figure 39**.

5. The user will then see the grid shown below in **Figure 41** which displays the following: Clinic Name, Abbreviations, Provider(s), Patient Friendly Name, Stop Code, Credit Stop Code, and Status (Active or Inactive).

test × **Search** + **Create New Clinic**

Valid Search Criteria: At least three characters in the Clinic Name or Abbreviation; or ` and the Clinic IEN (e.g. `3333).

Found 508 results matching your search

Reset Filters

Clinic Name	Abbreviations	Provider(s)	Patient Friendly Name	Stop Code	Credit Stop Code	Status
0000 ERROR MESSAGE2TEST			TEST123	323		Inactive
01/02/2025	TEST123		TEST	323	121	Inactive
01/02/2025 REPLICATE	TEST123		TEST	323	121	Inactive
112TEST CLINIC NAME ENTRY			112TEST CLINIC NAME ENTRY	323		Inactive
1977 958 DENTAL TEST			1977 958 DENTAL TEST	669		Active
2024 TEST			TEST1	129		Inactive
ACLINIC TEST	ACLINIC		ACLINIC TEST	123		Inactive
APPT TEST	FOO		Better Name	333	334	Active
AUTOMATION TESTING CLINIC			ONLY-AUTO	323	322	Inactive
BCLINIC TEST	BCLINI			123	179	Active

Rows per page 10 1 2 3 4 5 ... 51

Figure 41: Clinic Configurations Grid Table

3.2 View Current Clinic Configurations

1. After searching and selecting the desired clinic outlined in **3.1 Search for a Clinic Configuration** (see **Figure 39** for guidance), **Figure 42** will appear.

Clinic Settings	+
Preselected Settings	+
Optional Settings	+
Clinic Availability	+

Figure 42: Clinic Configurations Accordions

- ❖ *Note: Users with Edit access will need to select the “View Clinic Data” button seen below in **Figure 43** to only view clinic data.*

TECH WRITER TEST CLINIC

ACTIVE

Edit the clinic details for this location. Note that some fields may not be edited.

Clinic Actions ^

View Clinic Data

Expand all +

Mandatory Fields +

Figure 43: View Clinic Data Button

- The user will see the four clinic configuration settings: Clinic Settings, Preselected Settings, Optional Settings, and Clinic Availability, which can be viewed by selecting the “+” button highlighted in **Figure 42**. Optionally, the user can select the “Expand All” button to open all accordions at once.

- ❖ *Note: This function is available to Read Only and Write Access users. Only Write Access users will be able to edit.*
- ❖ *Note: The first menu option labeled “Clinic Settings” is only available when attempting to view details. This accordion will change to “Mandatory Fields” when attempting to edit.*

3.2.1 Viewing Clinic Settings

In **Figure 44** below, users can view the fields that appear within Clinic Settings.

Clinic Settings		
Clinic Name	Patient Friendly Name	Stop Code (Primary)
TECH WRITER TEST CLINIC	TECH WRITER CLINIC	131 - Urgent Care
Select Provider(s)	Medical Center Division	Length of Appointment
• TEST GENERIC,TEST	FT STEVENS CEM (HAMMOND)	30
Physical Location	Telephone	Telephone Extension
111 MAIN ST	111 111 1111	112

Figure 44: Clinic Settings View

3.2.2 Viewing Preselected Settings

In **Figure 45** below, users can view the fields that appear within Preselected Settings.

Preselected Settings		
Clinic meets at this facility	Allow Direct Patient Scheduling	Non-count Clinic
Yes	No	No
Variable Appointment Length	Display Appointments to Patients	Schedule on Holidays?
No	Yes	No
Hour Clinic Display Begins (MDT)	Default Appointment Type	Max Days for Future Booking
8	REGULAR	390
Display Increments Per Hour	Overbooks Per Day Maximum	E-checkin Allowed?
15	0	No
Pre-checkin Allowed?	Administer In Patient Meds?	Workload Validation at Check Out?
No	No	Yes
Service Code	Number No Shows Allowed	Start Time for Auto-Rebook
NONE	0	16
Max # of Days for Auto-Rebook		
1		

Figure 45: Preselected Settings View

3.2.3 Viewing Optional Settings

In **Figure 46** below, users can view the fields that appear within Optional Settings.

Optional Settings

Abbreviations

Credit Stop Code (Secondary)

Select Default Provider
TEST GENERIC,TEST

Clinic Cancellation Letter

No Show Letter

Pre-Appointment Letter

Appointment Cancellation Letter

Special Instructions

- TEST INSTRUCTIONS
- TEST INSTRUCTIONS 2

Prohibit Access to Clinic?

Yes

Privileged User(s) List

- USER, TEST
- USER, TEST

Figure 46: Optional Settings View

3.2.4 Viewing Clinic Availability

1. View-only users can search for clinic availability by choosing a date (mm/dd/yyyy format) from the calendar shown below in **Figure 47**.

Clinic Availability

View Timeslots

View a timeslot within a selected date range.

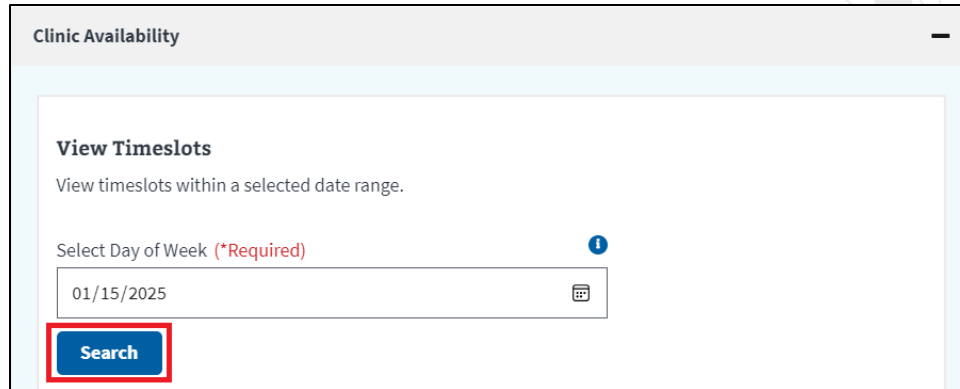
Select Day of Week (*Required)

mm/dd/yyyy

Search

Figure 47: Viewing Clinic Availability Calendar Button

- ❖ **Note:** The “Search” button will remain greyed out until a date is chosen; once chosen, the button will become available for selection as seen in **Figure 48**.



Clinic Availability

View Timeslots
View timeslots within a selected date range.

Select Day of Week **(*Required)** ⓘ

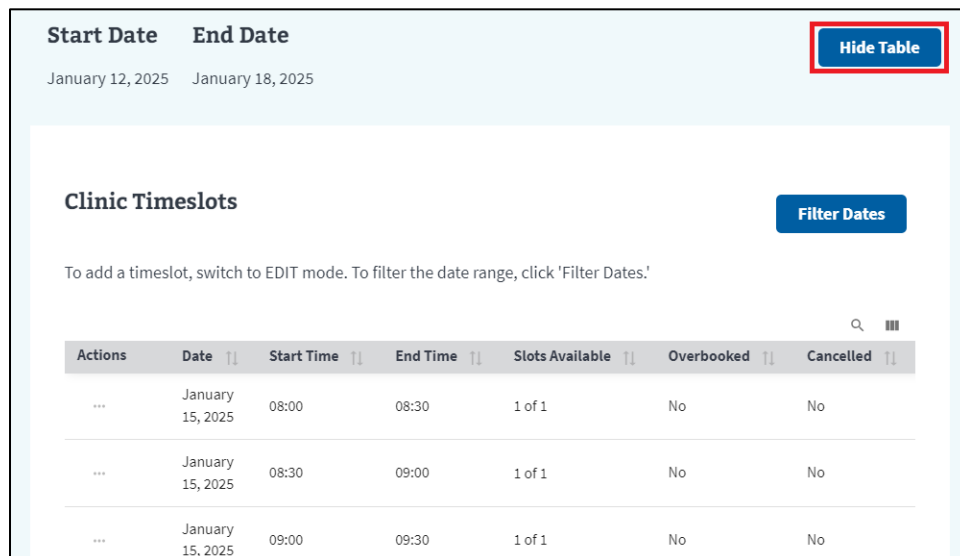
01/15/2025 ⓘ

Search

Figure 48: Viewing Clinic Availability Search Button

- After selecting search, the user will see the “Clinic Timeslots” table as seen below in **Figure 49** that will show the timeslots available for the most recent Sunday to the upcoming Saturday of that week.

❖ **Note:** Selecting the “Hide Table” button shown below in **Figure 49** will reset the “Clinic Timeslots” table completely.



Start Date **End Date**
January 12, 2025 January 18, 2025

Hide Table

Clinic Timeslots **Filter Dates**

To add a timeslot, switch to EDIT mode. To filter the date range, click 'Filter Dates.'

Actions	Date	Start Time	End Time	Slots Available	Overbooked	Cancelled
...	January 15, 2025	08:00	08:30	1 of 1	No	No
...	January 15, 2025	08:30	09:00	1 of 1	No	No
...	January 15, 2025	09:00	09:30	1 of 1	No	No

Figure 49: Viewing Clinic Availability Timeslots Example

❖ **Note:** Users can edit the number of timeslots shown on the page by selecting the arrows shown in **Figure 50**.



Rows per page 5 ⓘ ⓘ ⓘ ⓘ ⓘ ⓘ ⓘ ⓘ ⓘ ⓘ

Figure 50: Viewing Clinic Availability Timeslot Page View Options

3. The user can either look through the dates manually, or select the button shown below in **Figure 51** to filter the search results to a specific date. Once selected, the window shown in **Figure 52** will appear.

The interface shows a header with 'Start Date' (January 12, 2025) and 'End Date' (January 18, 2025), and a 'Hide Table' button. Below is the 'Clinic Timeslots' section with a 'Filter Dates' button highlighted in a red box. A message states: 'To add a timeslot, switch to EDIT mode. To filter the date range, click 'Filter Dates.''

Actions	Date	Start Time	End Time	Slots Available	Overbooked	Cancelled
...	January 15, 2025	08:00	08:30	1 of 1	No	No
...	January 15, 2025	08:30	09:00	1 of 1	No	No
...	January 15, 2025	09:00	09:30	1 of 1	No	No

Figure 51: Viewing Clinic Availability Filter Dates Button

4. After entering the required dates, the user can then select the filter dates button. The user will be shown an updated “Clinic Timeslots” table with the requested results.

The 'Filter Date Range' dialog box has a close button (X) in the top right. It contains two input fields: 'Enter the start date (*Required)' with the value '08/26/2025' and 'Enter the end date (*Required)' with the value '08/29/2025'. At the bottom are 'Cancel' and 'Filter Dates' buttons.

Figure 52: Viewing Clinic Availability Filter Date Range Example

4. Editing Clinic Configurations

*Disclaimer: This section of the guide is only applicable to users with the correct write access permissions. If the user does not have write access permissions set to the account, the user will receive the error message shown in **Figure 53**. If a user needs access to make changes on this application, please contact the local Clinical Applications Coordinator or Supervisor for assistance.*

The screenshot shows the VA CCM interface. The top navigation bar includes the VA CCM logo, a location dropdown set to '983: Cheyenne VA Medical Cen...', and a user profile icon. The left sidebar contains links for Clinic Configurations, Clinic Audit Report, Letters, Veteran Appointment Requests, Annual Clinic Profile Review, and Resources. The main content area is titled 'Clinic Configurations' and displays a yellow error message with a red border: 'You are not authorized to make changes on this application. Contact your Clinical Applications Coordinator or Supervisor for assistance.' Below the message is a search bar with a 'Search' button. At the bottom, it states 'Valid Search Criteria: At least three characters in the Clinic Name or Abbreviation; or ` and the Clinic IEN (e.g. ` 3333).'.

Figure 53: Authorization Error Message for Clinic Configurations

1. After searching and selecting the desired clinic outlined in **3.1 Search for a Clinic Configuration**, (see **Figure 39** for guidance), **Figure 54** will appear.

The screenshot shows the 'Edit Clinic' page for 'TECH WRITER TEST CLINIC'. The breadcrumb trail is 'Clinic Configurations > TECH WRITER TEST CLINIC'. The clinic status is 'ACTIVE'. A 'Clinic Actions' dropdown menu is visible. A note states: 'Edit the clinic details for this location. Note that some fields may not be edited.' There is an 'Expand all +' link. Below this are four expandable sections: 'Mandatory Fields', 'Preselected Default Fields', 'Optional Fields', and 'Clinic Availability', each with a '+' icon. A 'Save Changes' button is at the bottom right.

Figure 54: Edit Clinic Page

- The user will see the four clinic configuration settings: Mandatory Fields, Preselected Default Fields, Optional Fields, and Clinic Availability, which can be expanded by selecting the “+” next to each in **Figure 55**. Optionally, the user can select the “Expand All” button to open all accordions at once.

Mandatory Fields	+
Preselected Default Fields	+
Optional Fields	+
Clinic Availability	+

Figure 55: Editing Clinic Availability Accordions

- ❖ *Note: Users will not be able to update certain fields. If these fields need editing, users must create a new clinic.*
- ❖ *Note: User are allowed to add additional time slots. Basic functions of adding days of the week, Start Times, End Times, and number of slots are available.*

4.1 Editing Mandatory Fields

- Users with Write Access can edit the fields that appear within Mandatory Fields as shown in **Figure 56** below. The field(s) labeled “Required” must be edited before saving.

Mandatory Fields		
Clinic Name (*Required)	Patient Friendly Name (*Required)	Stop Code (Primary)
TECH WRITER TEST CLINIC	TECH WRITER CLINIC	131 - Urgent Care
Select Provider(s) (*Required)	Medical Center Division	Length of Appointment (*Required)
TEST GENERI... x x v	FT STEVENS CEM (HAMMOND)	30 v
Physical Location (*Required)	Telephone (*Required)	Telephone Extension (*Required)
111 MAIN ST	111 111 1111	112

Figure 56: Editing Mandatory Fields

❖ *Note: Please go to Section 9.2 **Tool Tip Descriptions** for more information on populating clinic settings.*

2. Once the desired edits have been made, the user must be sure to select the “Save Changes” button shown in **Figure 57** in the lower right-hand corner of the page.

Edit the clinic details for this location. Note that some fields may not be edited.

[Expand all +](#)

Mandatory Fields	+
Preselected Default Fields	+
Optional Fields	+
Clinic Availability	+

Save Changes

Figure 57: Update Clinic Button for Mandatory Fields

- ❖ *Note: The “Save Changes” button only becomes available when a minimum of one change has been made; if no change is made, the “Save Changes” button will remain greyed out.*
- ❖ *Note: The user must confirm their changes by selecting the “Save Changes” button, otherwise the user will receive the error message shown in **Figure 58**.*

You Have Unsaved Changes

The changes you made have not been saved.

Click "Continue Editing" to continue making changes,
or click "Discard Changes" to be re-directed.

Discard Changes **Continue Editing**

Figure 58: Changes Unsaved Message for Mandatory Fields

4.2 Editing Preselected Default Fields

1. Users with Write Access can edit the fields that appear within Preselected Default Fields as shown in **Figure 59** below.

Preselected Default Fields

Clinic Meets at This Facility? ☒ Yes ☐ No	Allow Direct Patient Scheduling? ☐ Yes ☒ No	Is Non-count Clinic No
Variable Appointment Length? ☐ Yes ☒ No	Display Appointments to Patients? ☒ Yes ☐ No	Schedule on Holidays? ☐ Yes ☒ No
Hour Clinic Display Begins (MST) 8	Default Appointment Type REGULAR	Max Days for Future Booking 390
Display Increments Per Hour 30	Overbooks Per Day Maximum 0	Max # of Days for Auto-Rebook 1
E-checkin Allowed? ☐ Yes ☒ No	Administer Inpatient Meds? ☒ Yes ☐ No	Workload Validation at Check Out? ☒ Yes ☐ No
Service Code NONE	Number No Shows Allowed 0	Start Time for Auto-Rebook 16
Pre-checkin Allowed? ☐ Yes ☒ No	Allow Vets Self Cancel? ☐ Yes ☒ No	

Figure 59: Editing Preselected Default Fields

❖ **Note:** Please go to **Section 9.2 Tool Tip Descriptions** for more information on populating clinic settings.

2. Once the desired edits have been made, the user must select the “Update Clinic” button shown in **Figure 60** in the lower right-hand corner of the page.

Edit the clinic details for this location. Note that some fields may not be edited.

Expand all +

Mandatory Fields	+
Preselected Default Fields	+
Optional Fields	+
Clinic Availability	+

Save Changes

Figure 60: Update Clinic Button for Preselected Default Fields

- ❖ *Note: The “Save Changes” button only becomes available when a minimum of one change has been made; if no change is made, the “Save Changes” button will remain greyed out.*
- ❖ *Note: The user must confirm their changes by selecting the “Save Changes” button, otherwise the user will receive the error message shown in **Figure 61**.*

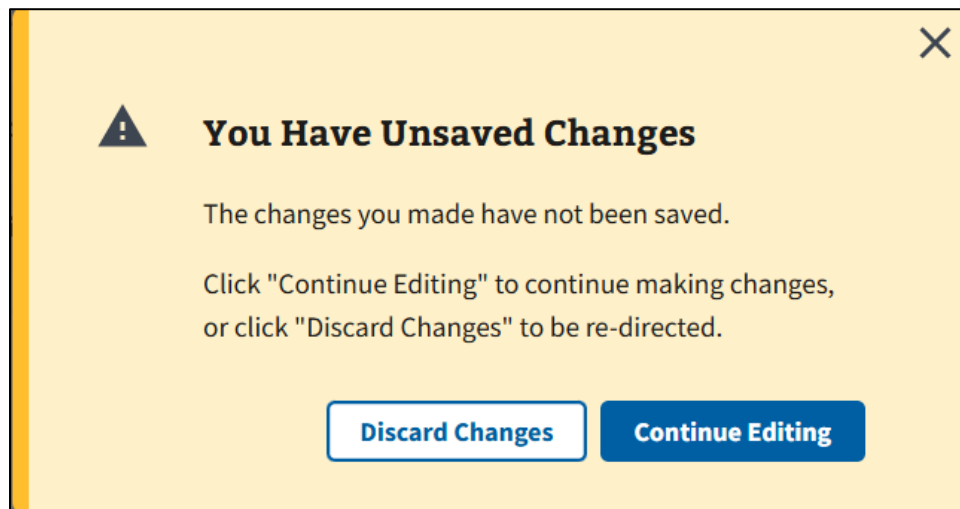


Figure 61: Changes Unsaved Message for Preselected Default Fields

4.3 Editing Optional Fields

1. Users with Write Access can edit the fields that appear within Preselected Default Fields as shown in **Figure 62** below.

Optional Fields

Abbreviations i

Credit Stop Code (Secondary)

Select Default Provider

Clinic Cancellation Letter i

No Show Letter i

Pre-Appointment Letter i

Appointment Cancellation Letter i

Special Instructions i

[See Full Special Instructions](#)

Prohibit Access to Clinic? i ☒ Yes ☐ No

Add/Remove Privileged User(s) i (*Required)

Figure 62: Editing Optional Fields

- ❖ *Note: Please go to Section 9.2 Tool Tip Descriptions for more information on populating clinic settings.*
 - ❖ *Note: The “See Full Special Instructions” button only becomes available when a minimum of one special instructions change has been made; if no change is made, the “See Full Special Instructions” button will not appear.*
 - ❖ *Note: The “Add/Remove Privileged User(s)” dropdown only becomes available when the “Prohibit Access to Clinic?” radio button is toggled to yes; if toggled to no, the “Add/Remove Privileged User(s)” dropdown will not appear.*
2. Once the desired edits have been made, the user must select the “Save Changes” button shown in **Figure 63** in the lower right-hand corner of the page.

Edit the clinic details for this location. Note that some fields may not be edited.

Expand all +

Mandatory Fields	+
Preselected Default Fields	+
Optional Fields	+
Clinic Availability	+

Save Changes

Figure 63: Update Clinic Button for Optional Fields

- ❖ *Note: The “Save Changes” button only becomes available when a minimum of one change has been made; if no change is made, the “Save Changes” button will remain greyed out.*
- ❖ *Note: The user must confirm their changes by selecting the “Save Changes” button, otherwise the user will receive the error message shown in **Figure 64**.*

✕



You Have Unsaved Changes

The changes you made have not been saved.

Click "Continue Editing" to continue making changes,
or click "Discard Changes" to be re-directed.

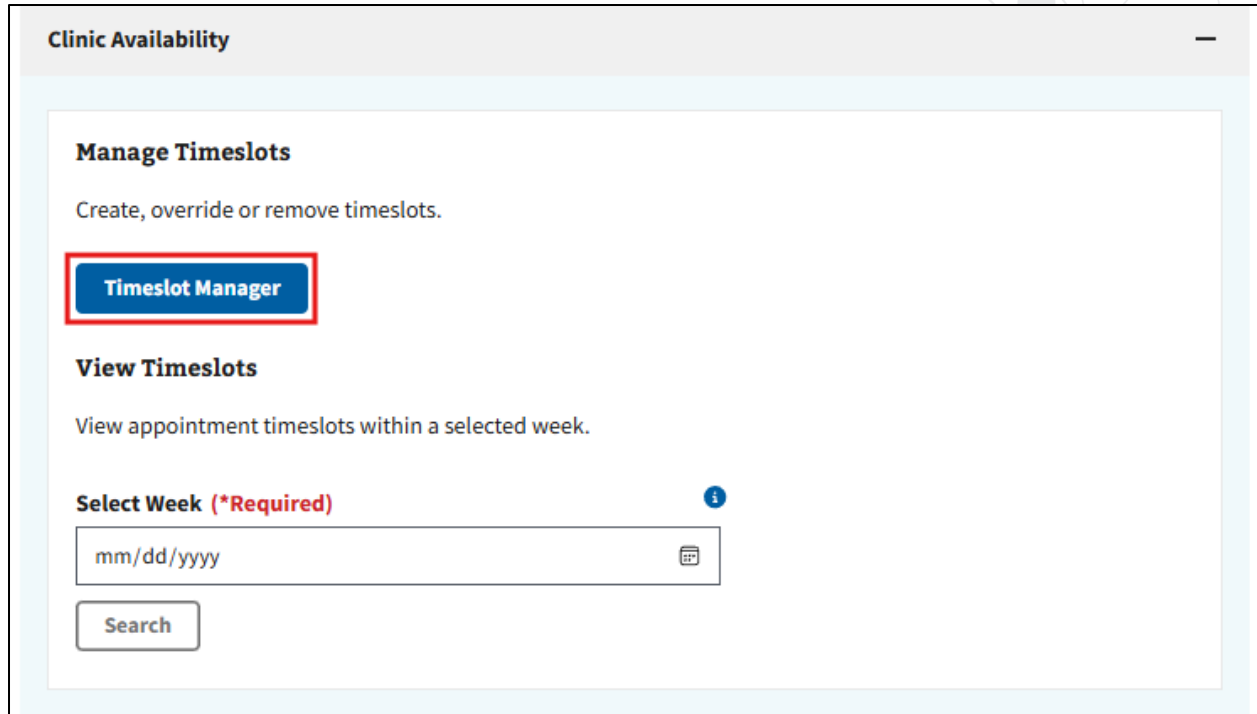
Discard Changes

Continue Editing

Figure 64: Changes Unsaved Message for Optional Fields

4.4 Editing Clinic Availability

*Disclaimer: The section below is a brief overview on searching timeslots. The user may select the “Timeslot Manager” button seen in **Figure 65** and skip to section **4.4.1 Add or Modify Timeslots for Single Day Modification** if needed.*



Clinic Availability

Manage Timeslots
Create, override or remove timeslots.

Timeslot Manager

View Timeslots
View appointment timeslots within a selected week.

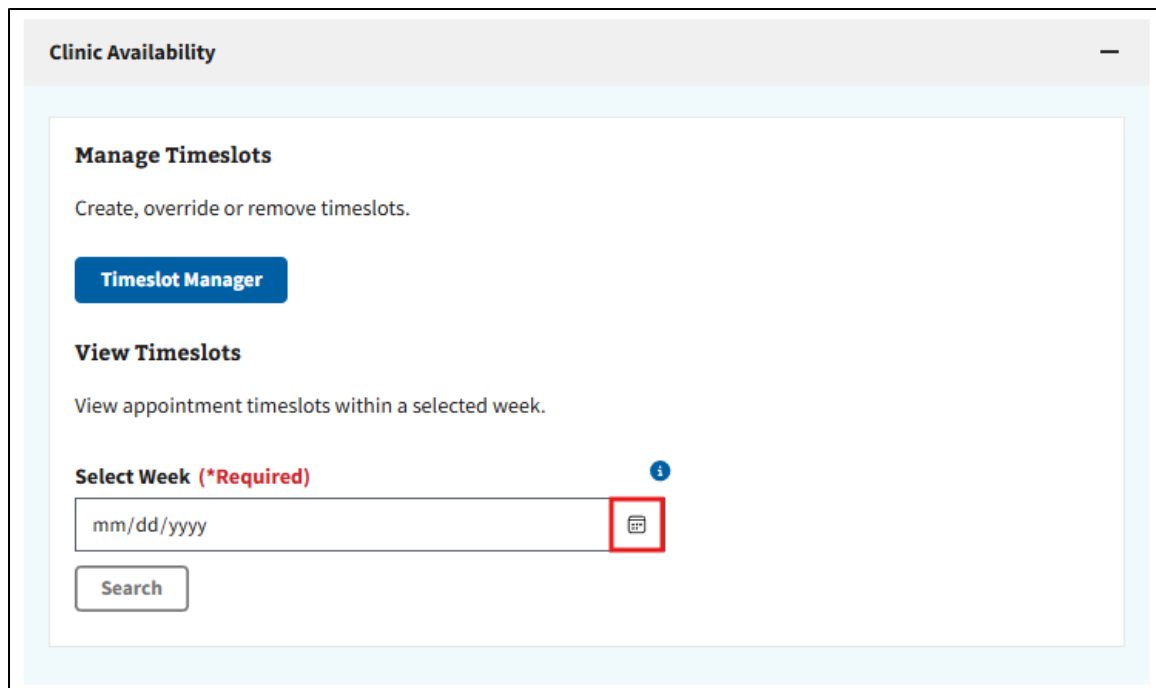
Select Week (*Required) ⓘ

mm/dd/yyyy ⓘ

Search

Figure 65: Timeslot Manager Button on Clinic Availability Accordion

1. Users with correct Write Access will be asked to select a date (mm/dd/yyyy format) from the calendar seen in **Figure 66**.



Clinic Availability

Manage Timeslots
Create, override or remove timeslots.

Timeslot Manager

View Timeslots
View appointment timeslots within a selected week.

Select Week (*Required) ⓘ

mm/dd/yyyy ⓘ

Search

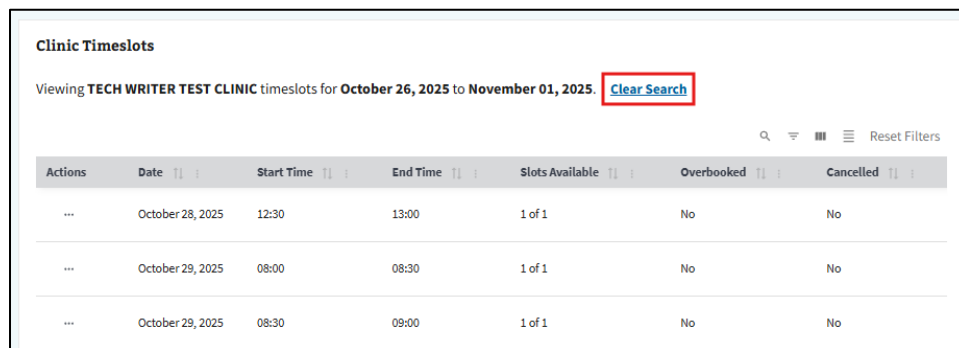
Figure 66: Calendar Button for Editing Clinic Availability

- After selecting the “Search” button, the Clinic Timeslots table (see **Figure 67** for example) will appear that will show the timeslots available for the most recent Sunday to the upcoming Saturday of that week.

❖ *Note: The “Search” button will remain greyed out until a date is chosen; once chosen, the button will become available for selection.*

- The user can either look through the dates manually or filter the search results to a specific date (see **2.4 Filters** for more information on filtering within grids).

❖ *Note: Selecting the “Clear Search” button shown below in **Figure 67** will reset the “Clinic Timeslots” table completely.*



Clinic Timeslots

Viewing **TECH WRITER TEST CLINIC** timeslots for **October 26, 2025 to November 01, 2025**. **Clear Search**

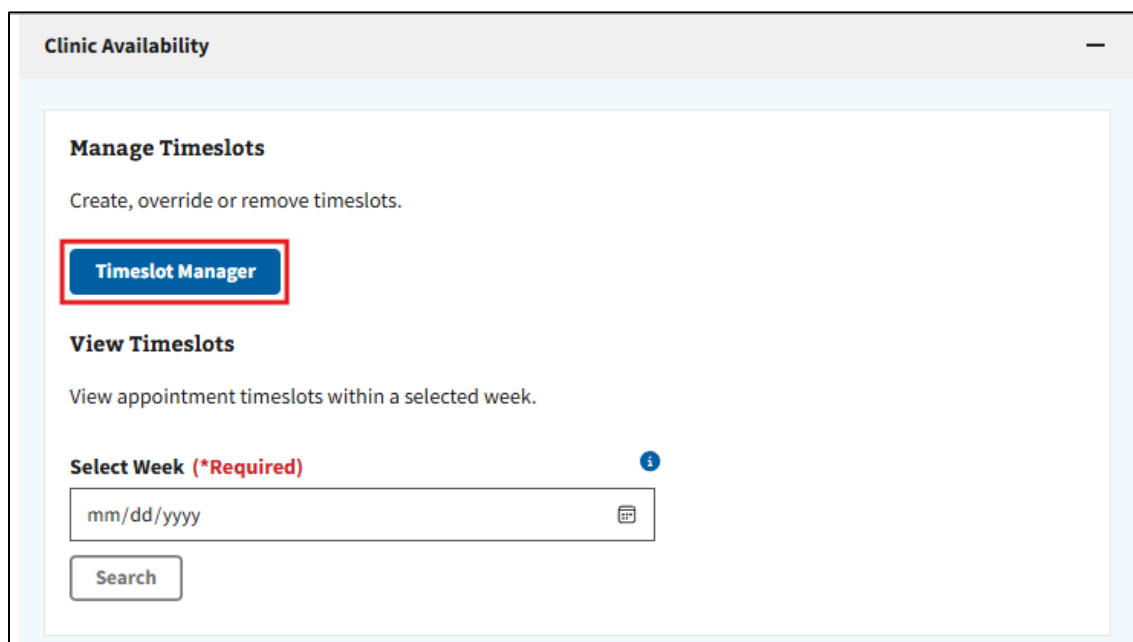
Reset Filters

Actions	Date	Start Time	End Time	Slots Available	Overbooked	Cancelled
...	October 28, 2025	12:30	13:00	1 of 1	No	No
...	October 29, 2025	08:00	08:30	1 of 1	No	No
...	October 29, 2025	08:30	09:00	1 of 1	No	No

Figure 67: Available Timeslots Example for Editing Clinic Availability

4.4.1 Add or Modify Timeslots for Single Day Modification

- Select the “Timeslot Manager” button shown in **Figure 68** to add a timeslot.



Clinic Availability

Manage Timeslots

Create, override or remove timeslots.

Timeslot Manager

View Timeslots

View appointment timeslots within a selected week.

Select Week (*Required)

mm/dd/yyyy

Search

Figure 68: Timeslot Manager Button for Editing Clinic Availability for Single Modification

2. After selecting the “Timeslot Manager” button, the user will be taken to the Timeslot Manager page shown in **Figure 69**. This will allow the user to add or remove timeslot(s) for a selected day.

Timeslot Manager

TECH WRITER TEST CLINIC

 **Reminder:** All entries made in Timeslot Manager will overwrite any pre-existing created timeslots.

Federal Holidays & Government Payroll Calendars ▾

Configure Entry

Select Action **(*Required)**

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type **(*Required)**

☒ Single Day
Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☐ Indefinite
Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select
Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☐ Recurring
Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Select Date **(*Required)**

MM/DD/YYYY 

Check for Cancelled Timeslots & Appointments

Cancel

Next: Review Changes

Figure 69: Timeslot Manager Page for Single Day

4.4.1.1 Adding Timeslots for Single Day Modification

1. To add a timeslot, select the radio button next to “Add Grid Availability” shown in **Figure 70**.

Configure Entry

Select Action (*Required)

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day
Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☒ Indefinite
Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select
Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☐ Recurring
Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Select Date (*Required)

MM/DD/YYYY

Check for Cancelled Timeslots & Appointments

Cancel **Next: Review Changes**

Figure 70: Add Grid Availability Radio Button for Single Day Modification

2. The user will then need to either select the button shown below in **Figure 71** to choose a date from the calendar or manually enter a date in the selection box.

Configure Entry

Select Action (*Required)

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☒ Indefinite

Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the

June 2026

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

repeat in multiple weeks as

The start date must be on a

MM/DD/YYYY

Figure 71: Calendar for Adding Grid Availability in Single Day Modification

- After selecting a date, the user will be prompted to check for cancelled timeslots as seen in **Figure 72**.

Configure Entry

Select Action **(*Required)**

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type **(*Required)**

☐ Single Day

Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☒ Indefinite

Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select

Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☐ Recurring

Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Select Date **(*Required)**

06/02/2026 

Check for Cancelled Timeslots & Appointments

Cancel **Next: Review Changes**

Figure 72: Check for Cancelled Timeslots Button for Single Day Modification

- ❖ **Note:** If a user attempts to add timeslots to a day with previous cancellations, the following information will display after selecting “Check for Cancelled Timeslots” (see **Figure 73** for example).

☒ **Single Day**
Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☐ **Indefinite**
Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ **Multi-select**
Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☐ **Recurring**
Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Select Date (*Required)

04/02/2026

Check for Cancelled Timeslots & Appointments

⚠ Cancelled timeslots exist for the selected date(s).

Cancelled Timeslots

⚠ Availability has been cancelled previously for this date. The day(s) will be overwritten with new availability. **Please record these results as cancelled timeslots will be unretrievable post-submission.**

Cancelled Timeslots

- April 02, 2026 12:00-13:00 - TEST

Figure 73: Cancelled Timeslot Information for Single Day

4. The page will then expand to full view, and the user will be required to populate the fields shown below in **Figure 74**.

06/02/2026

Check for Cancelled Timeslots & Appointments

✔ There were no cancelled timeslots or appointments found for the selected date(s).

Add Timeslots

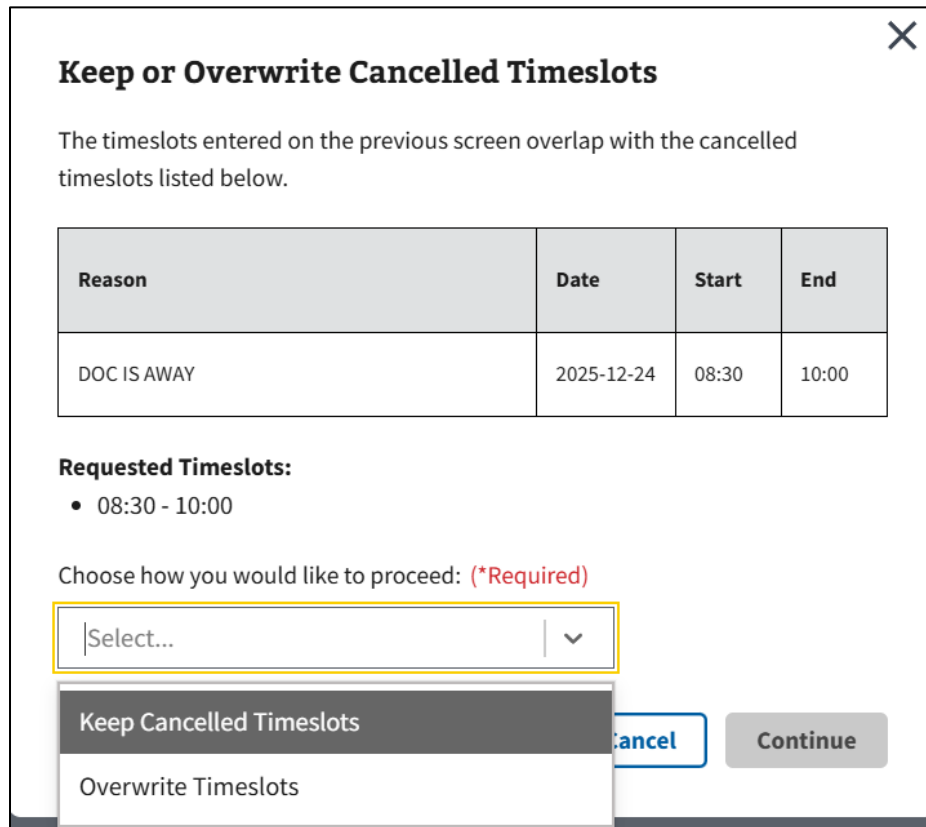
Start Time (*Required) End Time (*Required) Number of Slots (*Required)

Select... Select Start Time... 1

Cancel **Next: Review Changes**

Figure 74: Add Timeslots for Single Day Modification

- ❖ *Note: If a timeslot has been previously cancelled for the chosen date, the user will receive a notification prompting them to either keep the previously cancelled timeslots or overwrite the cancellation, as seen in **Figure 75**. After selecting an action, the user will need to select “Continue” to move forward with the modification.*



Keep or Overwrite Cancelled Timeslots

The timeslots entered on the previous screen overlap with the cancelled timeslots listed below.

Reason	Date	Start	End
DOC IS AWAY	2025-12-24	08:30	10:00

Requested Timeslots:

- 08:30 - 10:00

Choose how you would like to proceed: (*Required)

Select...

Keep Cancelled Timeslots
Overwrite Timeslots

Cancel
Continue

Figure 75: Cancelled Timeslots Information for Single Day Modification

- The user can also add multiple timeslots for the chosen day by selecting the “+” button seen in **Figure 76** and populating the same required fields.

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

01:30 PM 04:00 PM 1

Additional same day timeslots must begin after last ending time

Cancel Next: Review Changes

Figure 76: Adding Multiple Timeslots in Single Day Modification

- ❖ **Note:** The user is only allowed to create multiple timeslots for different times. If duplicate or overlapping times are attempted, the user will receive the error seen below in either **Figure 77** or **Figure 78**.

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM Select... 1

ERROR: Duplicate timeslot

Figure 77: Duplicate Timeslot Error for Single Day Modification

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 11:00 AM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

09:00 AM 10:00 AM 1

ERROR: Overlap Exists

Figure 78: Overlap Timeslot Error for Single Day Modification

❖ **Note:** To remove additional timeslots, select the “x” button seen in **Figure 79**.

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

01:30 PM 04:00 PM 1

Additional same day timeslots must begin after last ending time

Figure 79: Removing Timeslots for Single Day Modification

- When all required information has been entered, the user can select the “Next: Review Changes” button seen in **Figure 80** to continue to the next page for review.

The screenshot shows a web form titled "Add Timeslots". It contains two identical sections for adding timeslots. Each section has three input fields: "Start Time (*Required)" with a clock icon, "End Time (*Required)" with a clock icon, and "Number of Slots (*Required)" with a dropdown arrow. The first section shows "08:00 AM", "01:00 PM", and "1". The second section shows "01:30 PM", "04:00 PM", and "1". Below these sections is a note: "Additional same day timeslots must begin after last ending time" with a plus icon. At the bottom right, there are two buttons: "Cancel" and "Next: Review Changes". The "Next: Review Changes" button is highlighted with a red border.

Figure 80: Review Changes Button for Single Day Modification

❖ *Note: The user is required to select options from the hour and minutes field in “Start Hour” for the “Next: Review Changes” button to become highlighted.*

7. On the Review & Save Changes page (see **Figure 81** for example), the user will need to review the timeslot changes and select the “Save Changes” button to confirm. If further changes are necessary, the user can select the “Go Back” button to return to the configuration page.

TECH WRITER TEST CLINIC**Review & Save Changes**

Review the changes to clinic availability below before proceeding. Click "Go Back" to return to the previous screen, or Save Changes to proceed.

Entry Configuration:

Modification

Timeslot Type

Date

Add Grid Availability

Single Day

06/02/2026

Added Timeslots

i The timeslots below will be added for TECH WRITER TEST CLINIC

Date	Start Time	End Time	Slots
06/02/2026	08:00	08:30	1
06/02/2026	08:30	09:00	1
06/02/2026	09:00	09:30	1
06/02/2026	09:30	10:00	1
06/02/2026	10:00	10:30	1
06/02/2026	10:30	11:00	1
06/02/2026	11:00	11:30	1
06/02/2026	11:30	12:00	1
06/02/2026	12:00	12:30	1
06/02/2026	12:30	13:00	1

Rows per page 10 < 1 2 >

Overwritten Timeslots

A The timeslots below will be overwritten for TECH WRITER TEST CLINIC

Date	Start Time	End Time	Slots
06/02/2026	08:00	08:30	1
06/02/2026	08:30	09:00	1
06/02/2026	09:00	09:30	1
06/02/2026	09:30	10:00	1
06/02/2026	10:00	10:30	1
06/02/2026	10:30	11:00	1
06/02/2026	11:00	11:30	1
06/02/2026	11:30	12:00	1
06/02/2026	12:00	12:30	1
06/02/2026	12:30	13:00	1

Rows per page 10 < 1 >

Go Back

Save Changes

Figure 81: Review Page for Adding Single Day Timeslots

8. The user can confirm the changes have been made successfully when the pop-up seen in **Figure 82** appears.

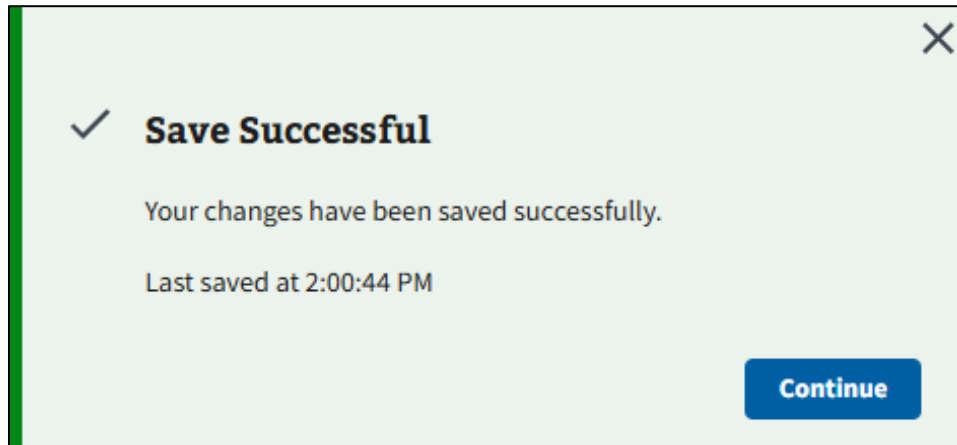


Figure 82: Save Successful Message for Single Day Modification

9. After successfully saving the edit, the user can select the “Continue” button shown in Figure 82 to be returned to the clinic configurations page for the specified clinic.

4.4.1.2 Removing Timeslots for Single Day Modification

1. Select the radio button next to “Remove Grid Availability” as seen in **Figure 83** to remove a timeslot.

Timeslot Manager

TECH WRITER TEST CLINIC

Reminder: All entries made in Timeslot Manager will overwrite any pre-existing created timeslots.

Federal Holidays & Government Payroll Calendars ▾

Configure Entry

Select Action (*Required)

☐ Add Grid Availability

☒ Remove Grid Availability

Choose Timeslot Type (*Required)

☒ Single Day
Remove timeslot entries that will not repeat. Can remove multiple entries for that day.

☐ Indefinite
Remove timeslot entries, which will repeat indefinitely on the selected day of the week. Can remove multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select
Allows timeslot entries associated to that day to be removed in multiple weeks as needed. Can remove multiple entries for that day.

☐ Recurring
Recurring allows timeslots to be removed on a specified pattern. The start date must be on a future date (cannot be today).

Select Date (*Required)

MM/DD/YYYY 

Cancel **Next: Review Changes**

Figure 83: Remove Grid Availability Radio Button for Single Day Modification

- The user will then need to either select the button shown below in **Figure 84** to choose a date from the calendar or manually enter a date in the selection box.

After choosing the specific date, the user will need to select the “No

- button shown in **Figure 85** to review the intended change.

Configure Entry

Select Action (*Required)

☐ Add Grid Availability

☒ Remove Grid Availability

Choose Timeslot Type (*Required)

☒ Single Day
Remove timeslot entries that will not repeat. Can remove multiple entries for that day.

☐ Indefinite
Remove timeslot entries, which will repeat indefinitely on the selected day of the week. Can remove multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select
Allows timeslot entries associated to that day to be removed in multiple weeks as needed. Can remove multiple entries for that day.

☐ Recurring
Recurring allows timeslots to be removed on a specified pattern. The start date must be on a future date (cannot be today).

Select Date (*Required)

06/02/2026

[Cancel](#) [Next: Review Changes](#)

Figure 85: Review Changes Button for Removing Single Day Modification

- On the Review & Save Changes page (see **Figure 86** for example), the user will need to review the timeslot changes and select the “Save Changes” button to confirm. If further changes are necessary, the user can select the “Go Back” button to return to the configuration page.

TECH WRITER TEST CLINIC

Review & Save Changes

Review the changes to clinic availability below before proceeding. Click "Go Back" to return to the previous screen, or Save Changes to proceed.

Entry Configuration:

Modification	Timeslot Type	Date
Remove Grid Availability	Single Day	06/02/2026

Removed Timeslots

i The timeslots below will be removed for TECH WRITER TEST CLINIC

Date	Start Time	End Time	Slots
06/02/2026	08:00	08:30	1
06/02/2026	08:30	09:00	1
06/02/2026	09:00	09:30	1
06/02/2026	09:30	10:00	1
06/02/2026	10:00	10:30	1
06/02/2026	10:30	11:00	1
06/02/2026	11:00	11:30	1
06/02/2026	11:30	12:00	1
06/02/2026	12:00	12:30	1
06/02/2026	12:30	13:00	1

Rows per page 10 < 1 2 >

[Go Back](#) [Save Changes](#)

Figure 86: Review Page for Removing Single Day Timeslots

- The user can confirm the changes have been made successfully when the pop-up seen in Figure 87 appears.

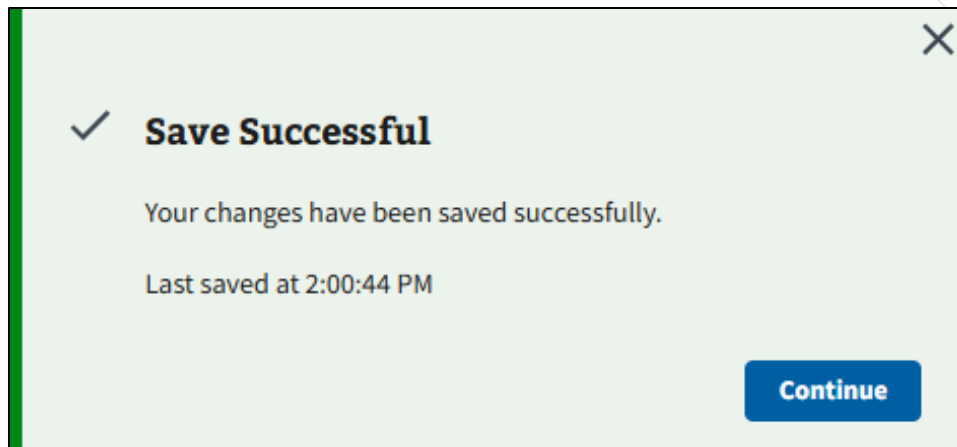


Figure 87: Save Successful for Remove Timeslot(s) in Single Day Modification

4.4.2 Add or Modify Timeslots for Indefinite Modification

1. Select the “Timeslot Manager” button shown in **Figure 88** to add a timeslot.

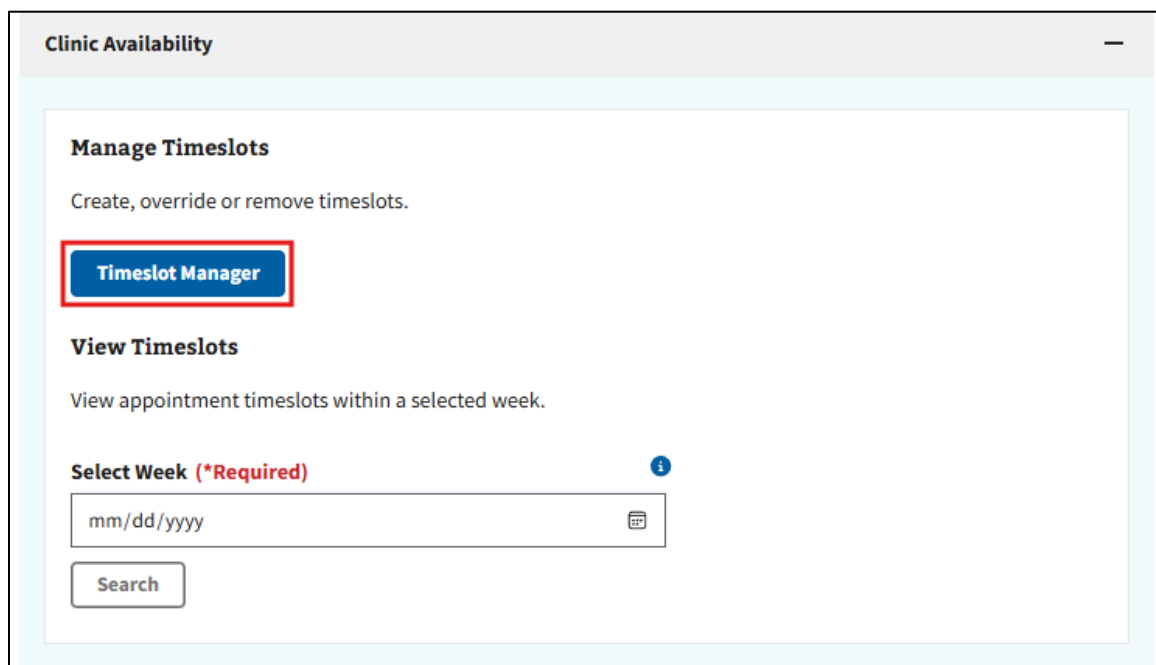


Figure 88: Timeslot Manager Button for Adding Clinic Availability for Indefinite Modification

2. After selecting the “Timeslot Manager” button, the user will be taken to the Timeslot Manager page shown in **Figure 89**.
 - ❖ *Note: This will allow the user to add or remove grid availability for an indefinite period on any consecutive day of the week. For example, if the user chooses to change timeslots on a Wednesday, indefinite modification will allocate the changes to every Wednesday thereafter.*

Timeslot Manager

TECH WRITER TEST CLINIC

Reminder: All entries made in Timeslot Manager will overwrite any pre-existing created timeslots.

[Federal Holidays & Government Payroll Calendars](#) ▾

Configure Entry

Select Action (*Required)

- ☒ Add Grid Availability
- ☐ Remove Grid Availability

Choose Timeslot Type (*Required)

- ☐ Single Day
Allows new timeslot entries that will not repeat. Can add multiple entries for that day.
- ☒ Indefinite
Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.
- ☐ Multi-select
Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.
- ☐ Recurring
Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Select Date (*Required)

MM/DD/YYYY



Check for Cancelled Timeslots & Appointments

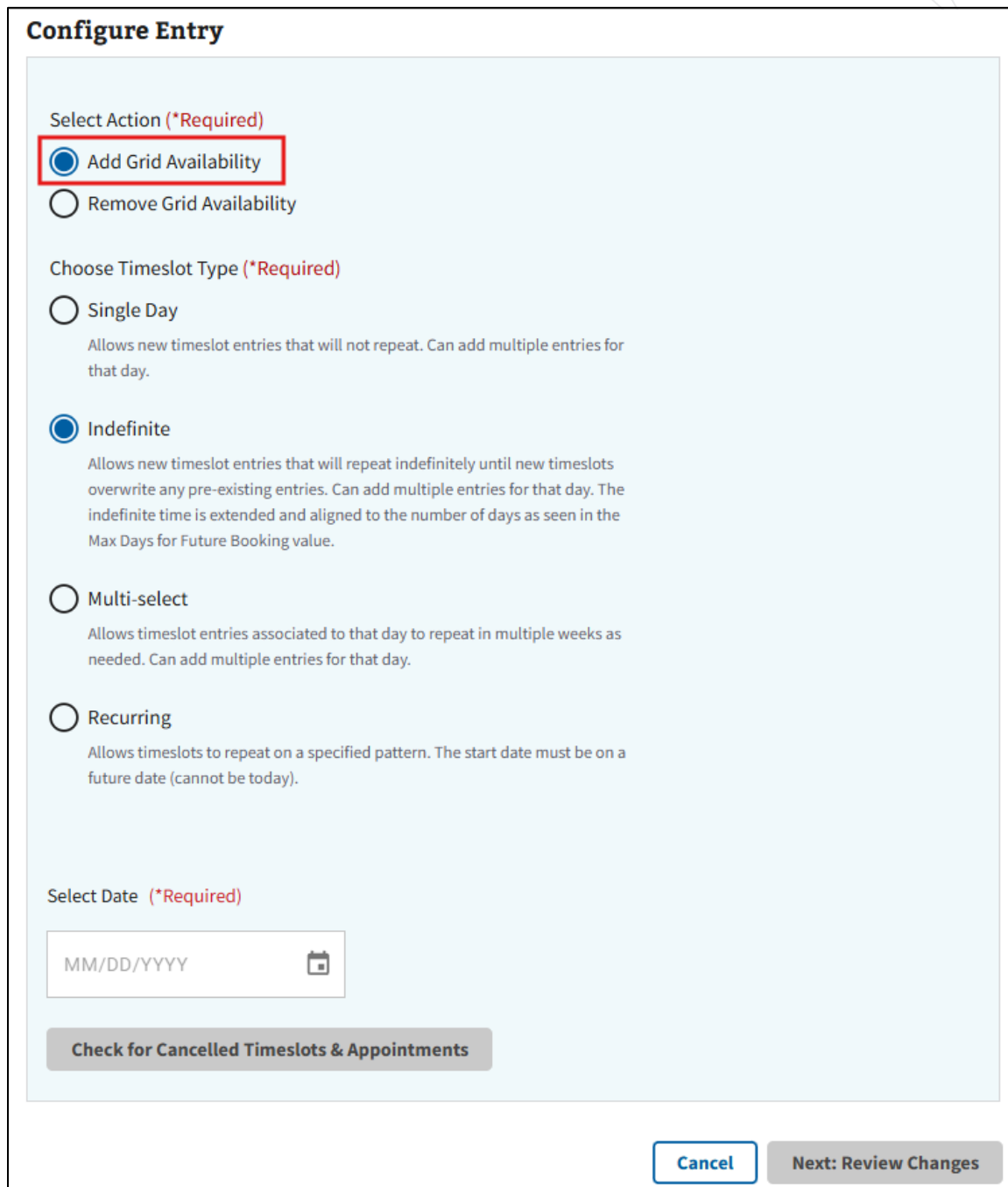
Cancel

Next: Review Changes

Figure 89: Timeslot Manager Page for Indefinite Modification

4.4.2.1 Adding Timeslots for Indefinite Modification

1. To add a timeslot, select the radio button next to “Add Grid Availability” shown in **Figure 90**.



Configure Entry

Select Action (*Required)

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☒ Indefinite

Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select

Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☐ Recurring

Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Select Date (*Required)

MM/DD/YYYY 

Check for Cancelled Timeslots & Appointments

Cancel **Next: Review Changes**

Figure 90: Add Grid Availability Radio Button for Indefinite Modification

2. The user will then need to either select the button shown below in **Figure 91** to choose a date from the calendar or manually enter a date in the selection box.

Configure Entry

Select Action (*Required)

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☒ Indefinite

Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the

June 2026

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

repeat in multiple weeks as

The start date must be on a

MM/DD/YYYY

Figure 91: Calendar for Add Grid Availability in Indefinite Modification

- After selecting a date, the user will be prompted to check for cancelled timeslots as seen in Figure 92.

Configure Entry

Select Action (*Required)

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☒ Indefinite

Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select

Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☐ Recurring

Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Select Date (*Required)

06/03/2026 

Check for Cancelled Timeslots & Appointments

[Cancel](#) [Next: Review Changes](#)

Figure 92: Check for Cancelled Timeslots for Indefinite Modification

- ❖ *Note: If a user attempts to add timeslots to a day with previous cancellations, the following information will display after selecting “Check for Cancelled Timeslots” (see Figure 93 for example).*

☐ Single Day
Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☒ Indefinite
Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select
Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☐ Recurring
Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Select Date (*Required)

04/02/2026

Check for Cancelled Timeslots & Appointments

Cancelled timeslots exist for the selected date(s).

Cancelled Timeslots

Availability has been cancelled previously for this date. The day(s) will be overwritten with new availability. **Please record these results as cancelled timeslots will be unretrievable post-submission.**

Cancelled Timeslots

- April 02, 2026 12:00-13:00 - TEST

Figure 93: Cancelled Timeslot Information for Indefinite

4. The page will then expand to full view, and the user will be required to populate the fields shown below in Figure 94.

06/03/2026

Check for Cancelled Timeslots & Appointments

There were no cancelled timeslots or appointments found for the selected date(s).

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

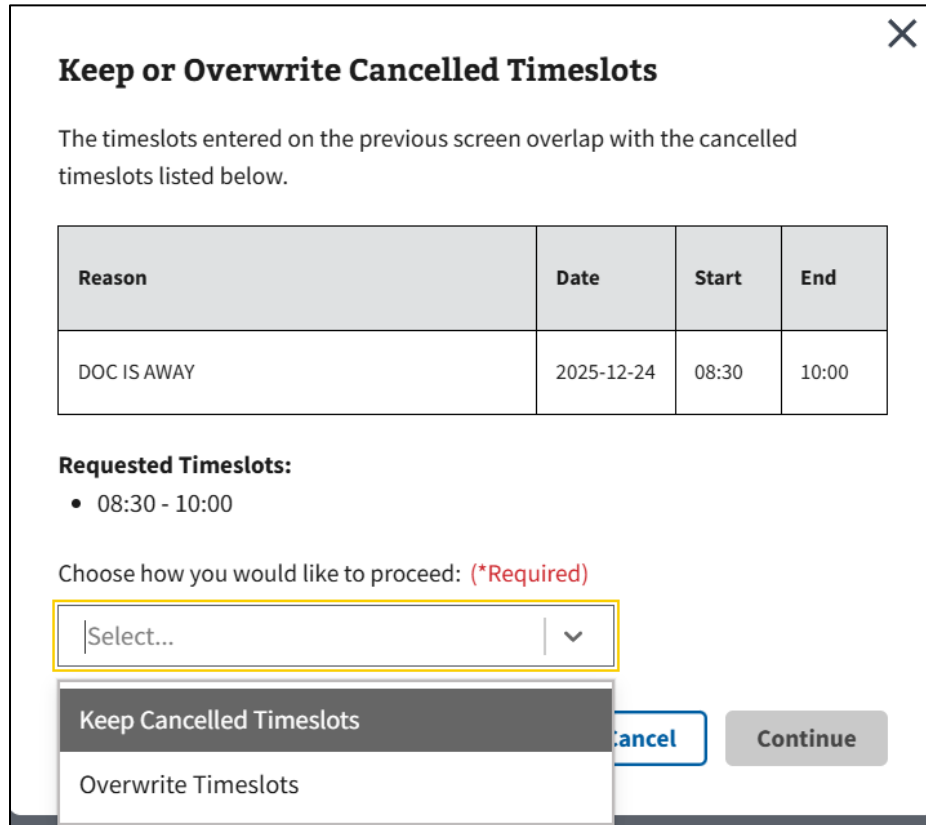
Select... Select Start Time... 1

+

Cancel Next: Review Changes

Figure 94: Add Timeslot for Indefinite Modification

- ❖ *Note: If a timeslot has been previously cancelled for the chosen date, the user will receive a notification prompting them to either keep the previously cancelled timeslots or overwrite the cancellation, as seen in **Figure 95**. After selecting an action, the user will need to select “Continue” to move forward with the modification.*



Keep or Overwrite Cancelled Timeslots

The timeslots entered on the previous screen overlap with the cancelled timeslots listed below.

Reason	Date	Start	End
DOC IS AWAY	2025-12-24	08:30	10:00

Requested Timeslots:

- 08:30 - 10:00

Choose how you would like to proceed: (*Required)

Select...

Keep Cancelled Timeslots
Overwrite Timeslots

Cancel
Continue

Figure 95: Cancelled Timeslots Information for Indefinite Modification

- The user can also add multiple timeslots for the chosen day by selecting the “+” button seen in Figure 96 and populating the same required fields.

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

01:30 PM 04:00 PM 1

Additional same day timeslots must begin after last ending time

Cancel Next: Review Changes

Figure 96: Adding Multiple Timeslots for Indefinite Modification

- ❖ **Note:** The user is only allowed to create multiple timeslots for different times. If duplicate or overlapping times are attempted, the user will receive the error seen below in either **Figure 97** or **Figure 98**.

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM Select... 1

ERROR: Duplicate timeslot

Figure 97: Duplicate Timeslot Error for Indefinite Modification

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 11:00 AM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

09:00 AM 10:00 AM 1

ERROR: Overlap Exists

Figure 98: Overlap Timeslot Error for Indefinite Modification

❖ **Note:** To remove additional timeslots, select the “x” button seen in **Figure 99**.

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

01:30 PM 04:00 PM 1

Additional same day timeslots must begin after last ending time

Figure 99: Removing Timeslots for Indefinite Modification

- When all required information has been entered, the user can select the “Next: Review Change” button seen in **Figure 100** to continue to the next page for review.

The screenshot shows a web form titled "Add Timeslots". It contains two identical sections for adding timeslots. Each section has three input fields: "Start Time (*Required)" with a clock icon, "End Time (*Required)" with a clock icon, and "Number of Slots (*Required)" with a dropdown arrow. The first section has values "08:00 AM", "01:00 PM", and "1". The second section has values "01:30 PM", "04:00 PM", and "1". Below these sections is a note: "Additional same day timeslots must begin after last ending time" with a plus icon. At the bottom right, there are two buttons: "Cancel" and "Next: Review Changes". The "Next: Review Changes" button is highlighted with a red border.

Figure 100: Review Changes Button for Indefinite Modification

❖ *Note: The user is required to select options from the hour and minutes field in “Start Hour” for the “Next: Review Changes” button to become highlighted.*

7. On the Review & Save Changes page (see **Figure 101** for example), the user will need to review the timeslot changes and select the “Save Changes” button to confirm. If further changes are necessary, the user can select the “Go Back” button to return to the configuration page.

TECH WRITER TEST CLINIC**Review & Save Changes**

Review the changes to clinic availability below before proceeding. Click "Go Back" to return to the previous screen, or Save Changes to proceed.

Entry Configuration:

Modification

Timeslot Type

Date

Add Grid Availability

Indefinite

06/03/2026

Added Timeslots

i The timeslots below will be added for TECH WRITER TEST CLINIC

Date	Start Time	End Time	Slots
06/03/2026	08:00	08:30	1
06/03/2026	08:30	09:00	1
06/03/2026	09:00	09:30	1
06/03/2026	09:30	10:00	1
06/03/2026	10:00	10:30	1
06/03/2026	10:30	11:00	1
06/03/2026	11:00	11:30	1
06/03/2026	11:30	12:00	1
06/03/2026	12:00	12:30	1
06/03/2026	12:30	13:00	1

Rows per page 10 < 1 2 >

Overwritten Timeslots

⚠ The timeslots below will be overwritten for TECH WRITER TEST CLINIC

Date	Start Time	End Time	Slots
06/03/2026	08:00	08:30	1
06/03/2026	08:30	09:00	1
06/03/2026	09:00	09:30	1
06/03/2026	09:30	10:00	1
06/03/2026	10:00	10:30	1
06/03/2026	10:30	11:00	1
06/03/2026	11:00	11:30	1
06/03/2026	11:30	12:00	1
06/03/2026	12:00	12:30	1
06/03/2026	12:30	13:00	1

Rows per page 10 < 1 2 >

Go Back

Save Changes

Figure 101: Review Page for Adding Indefinite Timeslots

8. The user can confirm the changes have been made successfully when the pop-up seen in Figure 102 appears.

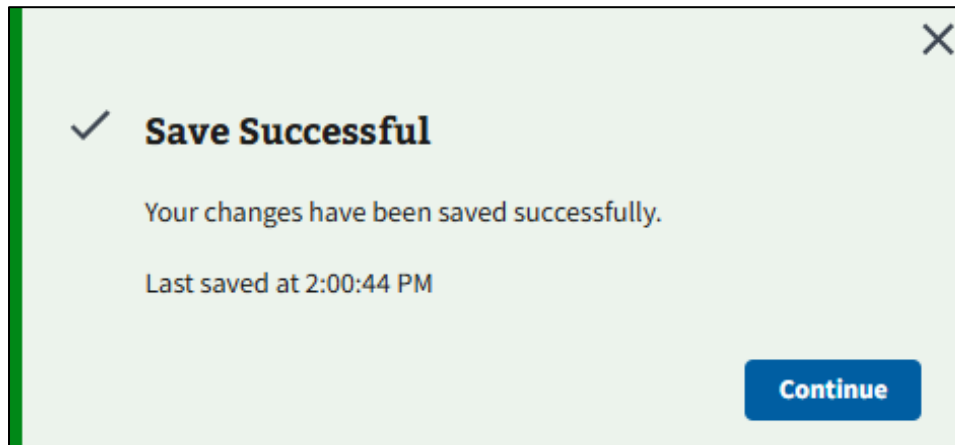


Figure 102: Save Successful Message for Indefinite Modification

- ❖ *Note: When using the indefinite option, the indefinite pattern set for the timeslot will go as far as it can until it meets a pre-existing known pattern that has already been established.*
9. After successfully saving the edit, the user can select the “Continue” button shown in Figure 102 to be returned to the clinic configurations page of the specified clinic.

4.4.2.2 Removing Timeslots for Indefinite Modification

1. Select the radio button next to “Remove Grid Availability” as seen in Figure 103 to remove a timeslot.

TECH WRITER TEST CLINIC

Reminder: All entries made in Timeslot Manager will overwrite any pre-existing created timeslots.

Federal Holidays & Government Payroll Calendars ▾

Configure Entry

Select Action (*Required)

☐ Add Grid Availability

☒ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Remove timeslot entries that will not repeat. Can remove multiple entries for that day.

☒ Indefinite

Remove timeslot entries, which will repeat indefinitely on the selected day of the week. Can remove multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select

Allows timeslot entries associated to that day to be removed in multiple weeks as needed. Can remove multiple entries for that day.

☐ Recurring

Recurring allows timeslots to be removed on a specified pattern. The start date must be on a future date (cannot be today).

Select Date (*Required)

MM/DD/YYYY 

Cancel **Next: Review Changes**

Figure 103: Remove Grid Availability Radio Button for Indefinite Modification

- The user will then need to either select the button shown below in **Figure 104** to choose a date from the calendar or manually enter a date in the selection box.

OGY

[illegible]

3. After selecting a date, the page will expand, and the user will be prompted to choose “Yes” or “No” as shown in **Figure 105**. Select “Yes” to remove timeslots indefinitely from the chosen day of the week.

Select Date (*Required)

06/02/2026 

Remove TUESDAY indefinitely? (*Required)

☒ Yes

☐ No

Cancel Next: Review Changes

Figure 105: Option to Remove Day Indefinitely for Indefinite Modification

If selecting “No”, the user will be prompted to specify the days to be removed from the calendar as seen in **Figure 106**.

Select Date (*Required)

06/02/2026 

Remove TUESDAY indefinitely? (*Required)

☐ Yes

☒ No

June 2026 < >

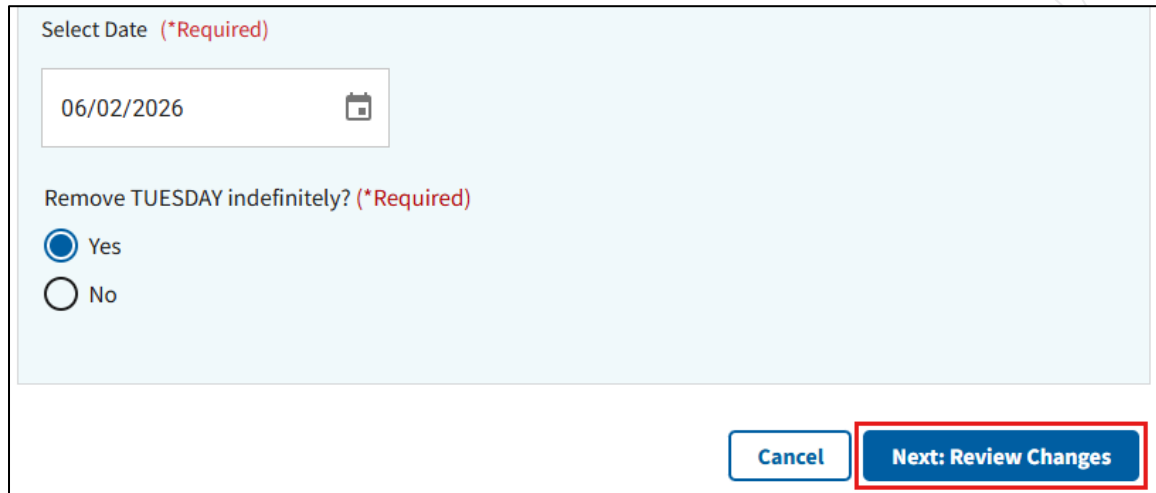
SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date Input ⓘ

06/02/2026 x 06/16/2026 x x ▼

Figure 106: Choosing Multiple Days to Remove in Indefinite Modification

4. To review the intended changes, the user will need to select the “Next: Review Changes” button shown in Figure 107.



Select Date (*Required)

06/02/2026

Remove TUESDAY indefinitely? (*Required)

☒ Yes

☐ No

Cancel Next: Review Changes

Figure 107: Review Changes Button for Removing Indefinite Timeslots

5. On the Review & Save Changes page (see **Figure 108** for example), the user will need to review the timeslot changes and select the “Save Changes” button to confirm. If further changes are necessary, the user can select the “Go Back” button to return to the configuration page.

TECH WRITER TEST CLINIC**Review & Save Changes**

Review the changes to clinic availability below before proceeding. Click "Go Back" to return to the previous screen, or Save Changes to proceed.

Entry Configuration:

Modification

Timeslot Type

Date

Remove Grid Availability

Indefinite

06/02/2026

Removed Timeslots

i The timeslots below will be removed for TECH WRITER TEST CLINIC

Date ↑↓ :	Start Time ↑↓ :	End Time ↑↓ :	Slots ↑↓ :
06/02/2026	08:00	08:30	1
06/02/2026	08:30	09:00	1
06/02/2026	09:00	09:30	1
06/02/2026	09:30	10:00	1
06/02/2026	10:00	10:30	1
06/02/2026	10:30	11:00	1
06/02/2026	11:00	11:30	1
06/02/2026	11:30	12:00	1
06/02/2026	12:00	12:30	1
06/02/2026	12:30	13:00	1

Rows per page 10 ▾ 1 < 2 3 4 5 ... 106 > >I

Go Back

Save Changes

Figure 108: Review Page for Removing Indefinite Timeslots

- The user can confirm the changes have been made successfully when the pop-up seen in Figure 109 appears.

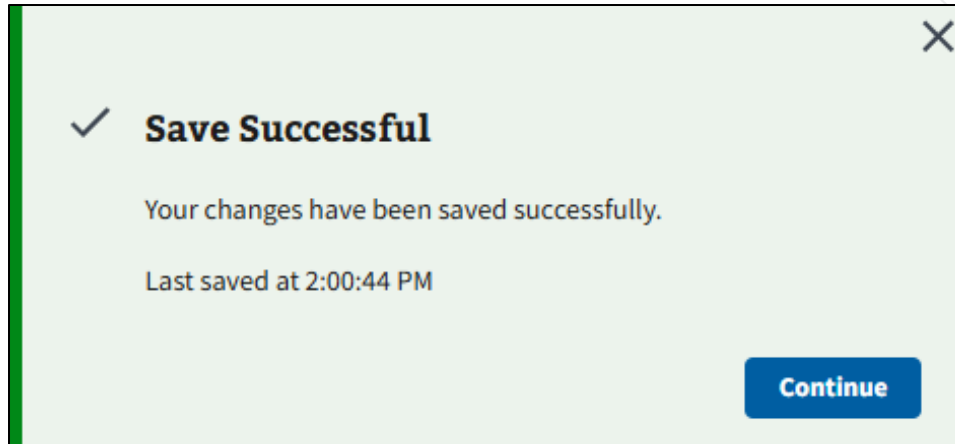


Figure 109: Save Successful for Remove Timeslot(s) in Indefinite Modification

- After successfully saving the edit, the user can select the “Continue” button shown in Figure 109 to be returned to the clinic configurations page for the specified clinic.

4.4.3 Add or Modify Timeslots for Multi-select Modification

- Select the “Timeslot Manager” button shown in Figure 110 to add a timeslot.

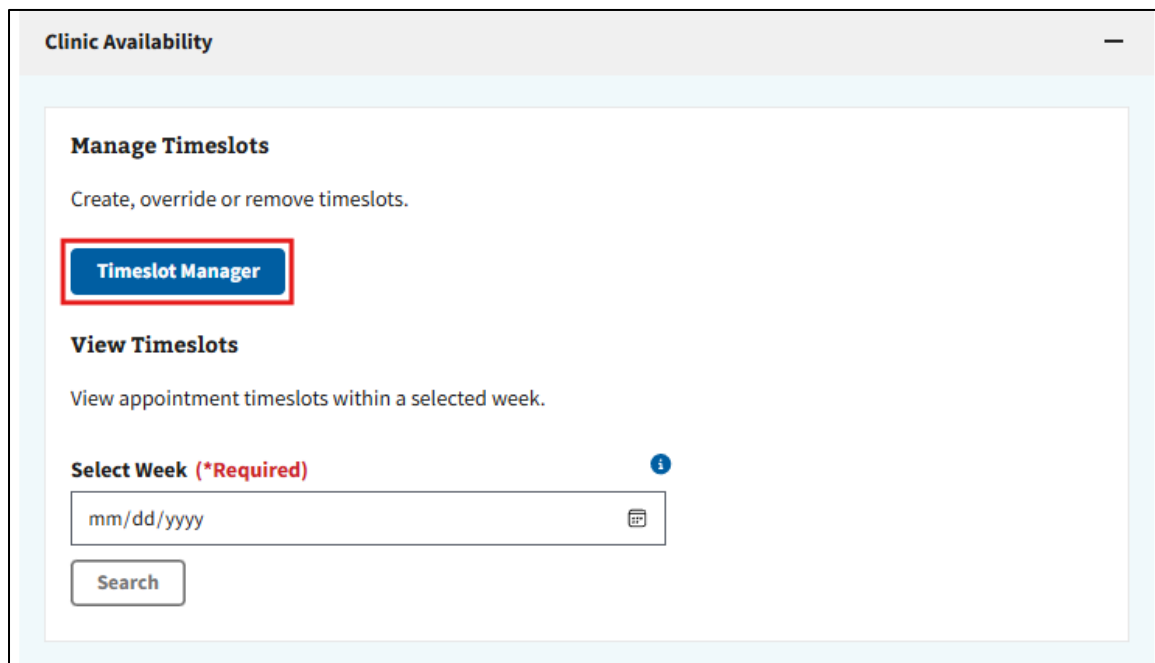


Figure 110: Timeslot Manager Button for Editing Clinic Availability for Multi-select

- After selecting the “Timeslot Manager” button, the user will be taken to the Timeslot Manager page shown in Figure 111.
 - ❖ *Note: This will allow the user to add or remove timeslots for multiple dates on the same consecutive day of the week. For example, if the first date chosen is a Tuesday, only dates from subsequent Tuesdays will be available.*

Timeslot Manager

TECH WRITER TEST CLINIC

Reminder: All entries made in Timeslot Manager will overwrite any pre-existing created timeslots.

[Federal Holidays & Government Payroll Calendars](#) ▾

Configure Entry

Select Action (*Required)

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day
Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☐ Indefinite
Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☒ Multi-select
Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☐ Recurring
Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Add Multiselect Dates

Calendar Picker [Copy/Paste Date Input](#)

June 2026 < >

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date Input ⓘ

Manually type or select dates from the calendar... ▾

[Check for Cancelled Timeslots & Appointments](#)

[Cancel](#) [Next: Review Changes](#)

Figure 111: Timeslot Manager Page for Multi-select Modification

4.4.3.1 Adding Timeslots for Multi-select Modification

1. To add a timeslot, select the radio button next to “Add Grid Availability” shown in Figure 112.

Configure Entry

Select Action (*Required)

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☐ Indefinite

Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☒ Multi-select

Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☐ Recurring

Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Add Multiselect Dates

Calendar Picker Copy/Paste Date Input

June 2026

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date Input ⓘ

Manually type or select dates from the calendar...

Check for Cancelled Timeslots & Appointments

Cancel Next: Review Changes

Figure 112: Add Grid Availability Radio Button for Multi-select Modification

2. The user will then need to either select the dates using the calendar shown below in Figure 113, or by manually entering the dates via the “Date Input” field.

Add Multiselect Dates

Calendar Picker Copy/Paste Date Input

June 2026 < >

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date Input ⓘ

Manually type or select dates from the calendar...

Check for Cancelled Timeslots & Appointments

Cancel Next: Review Changes

Figure 113: Calendar for Multi-select Modification

- ❖ **Note:** The formats MM-DD-YYYY or MM/DD/YYYY need to be used when manually entering dates into the “Date Input” field. Any other format will result in the error seen below in Figure 114.

Date Input ⓘ

3/10/2026

Please enter a valid date input MM-DD-YYYY or MM/DD/YYYY

Figure 114: Invalid Date Format Error

3. After selecting a date(s), the user will be prompted to check for cancelled timeslots as seen in Figure 115.

Add Multiselect Dates

Calendar Picker Copy/Paste Date Input

June 2026 < >

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date Input ⓘ

06/17/2026 x 06/23/2026 x x v

Check for Cancelled Timeslots & Appointments

Cancel Next: Review Changes

Figure 115: Check for Cancelled Timeslots Button for Multi-select Modification

- ❖ **Note:** When using the Multi-select timeslot type, users can choose to bulk paste dates from another source. If the user enters a date that falls on a federal holiday, in the past, or on a date more than 2 years in the future, an error message will appear (seen in Figure 116 for example).

Add Multiselect Dates

Calendar Picker **Copy/Paste Date Input**

Date Input ⓘ

06/19/2026 x 06/20/2026 x 06/21/2026 x

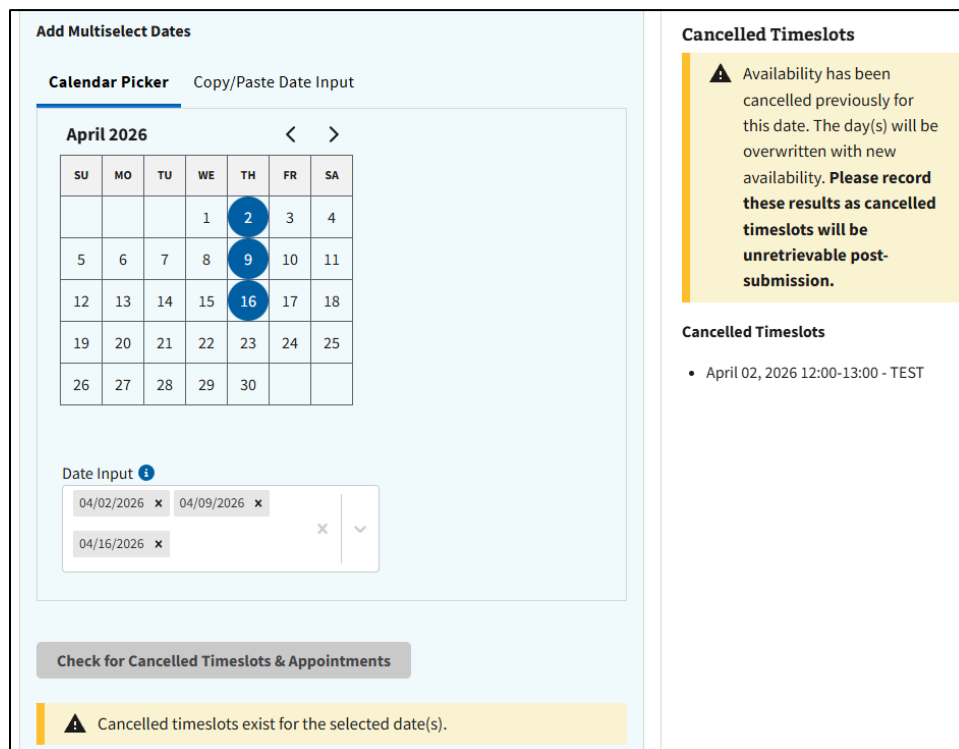
Error: 06/19/2026 - Cannot schedule a date for JUNETEENTH NATIONAL INDEPENDENCE DAY

ⓘ [Copy/Paste Date Input Instructions](#) v

Cancel Next: Review Changes

Figure 116: Bulk Paste Example for Multi-select Timeslots

- ❖ **Note:** If a user attempts to add timeslots to a day with previous cancellations, the following information will display after selecting “Check for Cancelled Timeslots” (see Figure 117 for example).



Add Multiselect Dates

Calendar Picker **Copy/Paste Date Input**

April 2026 < >

SU	MO	TU	WE	TH	FR	SA
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Date Input ⓘ

04/02/2026 x 04/09/2026 x

04/16/2026 x

Check for Cancelled Timeslots & Appointments

Cancelled Timeslots

⚠ Availability has been cancelled previously for this date. The day(s) will be overwritten with new availability. **Please record these results as cancelled timeslots will be unretrievable post-submission.**

Cancelled Timeslots

- April 02, 2026 12:00-13:00 - TEST

⚠ Cancelled timeslots exist for the selected date(s).

Figure 117: Cancelled Timeslot Information for Multi-select

4. The page will expand to full view, and the user will be required to populate the fields shown below in Figure 118.

Add Multiselect Dates

Calendar Picker Copy/Paste Date Input

June 2026 < >

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date Input ⓘ

06/17/2026 x 06/23/2026 x x v

Check for Cancelled Timeslots & Appointments

✔ There were no cancelled timeslots or appointments found for the selected date(s).

Add Timeslots

Start Time (*Required)
Select... ⌚

End Time (*Required)
Select Start Time... ⌚

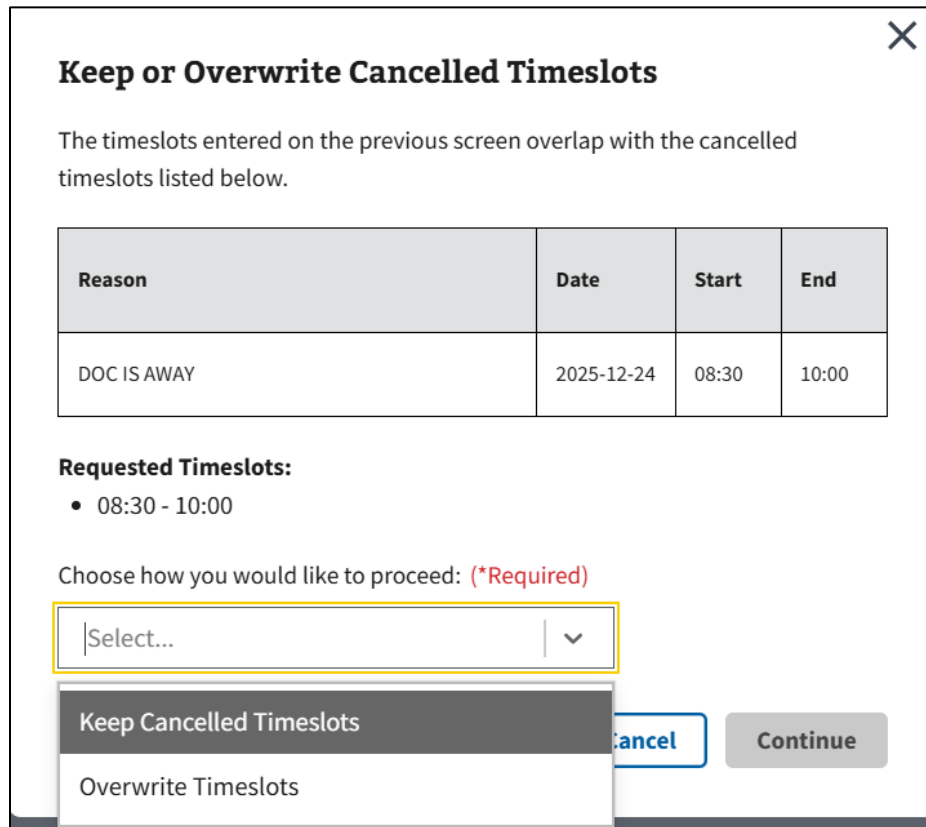
Number of Slots (*Required)
1 ⬆ ⬆

+

Cancel **Next: Review Changes**

Figure 118: Add Timeslot for Multi-select Modification

- ❖ *Note: If a timeslot has been previously cancelled for the chosen date, the user will receive a notification prompting them to either keep the previously cancelled timeslots or overwrite the cancellation, as seen in Figure 119. After selecting an action, the user will need to select “Continue” to move forward with the modification.*



Keep or Overwrite Cancelled Timeslots

The timeslots entered on the previous screen overlap with the cancelled timeslots listed below.

Reason	Date	Start	End
DOC IS AWAY	2025-12-24	08:30	10:00

Requested Timeslots:

- 08:30 - 10:00

Choose how you would like to proceed: (*Required)

Select...

Keep Cancelled Timeslots
Overwrite Timeslots

Cancel
Continue

Figure 119: Cancelled Timeslots Information for Multi-select Modification

10. The user can also add multiple timeslots for the chosen days by selecting the “+” button seen in Figure 120 and populating the same required fields.

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

01:30 PM 04:00 PM 1

Additional same day timeslots must begin after last ending time

Cancel Next: Review Changes

Figure 120: Adding Multiple Timeslots in Multi-select Modification

- ❖ **Note:** The user is only allowed to create multiple timeslots for different times. If duplicate or overlapping times are attempted, the user will receive the errors seen below in either Figure 121 or Figure 122.

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM Select... 1

ERROR: Duplicate timeslot

Figure 121: Duplicate Timeslot Error for Multi-select Modification

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 11:00 AM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

09:00 AM 10:00 AM 1

ERROR: Overlap Exists

Figure 122: Overlap Timeslot Error for Multi-select Modification

❖ **Note:** To remove additional timeslots, select the “x” button seen in Figure 123.

Add Timeslots

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

01:30 PM 04:00 PM 1

Additional same day timeslots must begin after last ending time

Figure 123: Removing Timeslots for Multi-select Modification

- When all required information has been entered, the user can select the “Next: Review Changes” button seen in Figure 124 to continue to the next page for review.

The screenshot shows a web form titled "Add Timeslots". It contains two identical sections for adding timeslots. Each section has three input fields: "Start Time (*Required)" with a clock icon, "End Time (*Required)" with a clock icon, and "Number of Slots (*Required)" with a dropdown arrow. The first section shows "08:00 AM", "01:00 PM", and "1". The second section shows "01:30 PM", "04:00 PM", and "1". Below these sections is a note: "Additional same day timeslots must begin after last ending time" with a plus icon. At the bottom right, there are two buttons: "Cancel" and "Next: Review Changes". The "Next: Review Changes" button is highlighted with a red border.

Figure 124: Review Changes Button for Multi-select Modification

❖ *Note: The user is required to select options from the hour and minutes field in “Start Hour” for the “Next: Review Changes” button to become highlighted.*

12. On the Review & Save Changes page (see **Figure 125** for example), the user will need to review the timeslot changes and select the “Save Changes” button to confirm. If further changes are necessary, the user can select the “Go Back” button to return to the configuration page.

TECH WRITER TEST CLINIC**Review & Save Changes**

Review the changes to clinic availability below before proceeding. Click "Go Back" to return to the previous screen, or Save Changes to proceed.

Entry Configuration:

Modification

Timeslot Type

Date(s)

Add Grid Availability

Multiselect

Multiple (See below)

Added Timeslots

i The timeslots below will be added for TECH WRITER TEST CLINIC

Date	Start Time	End Time	Slots
06/17/2026	08:00	08:30	1
06/17/2026	08:30	09:00	1
06/23/2026	08:00	08:30	1
06/23/2026	08:30	09:00	1

Rows per page 10

Overwritten Timeslots

⚠ The timeslots below will be overwritten for TECH WRITER TEST CLINIC

Date	Start Time	End Time	Slots
06/17/2026	08:00	08:30	1
06/17/2026	08:30	09:00	1
06/23/2026	08:00	08:30	1
06/23/2026	08:30	09:00	1

Rows per page 10

Go Back

Save Changes

Figure 125: Review Page for Adding Multi-select Timeslots

13. The user can confirm the changes have been made successfully when the pop-up seen in Figure 126 appears.

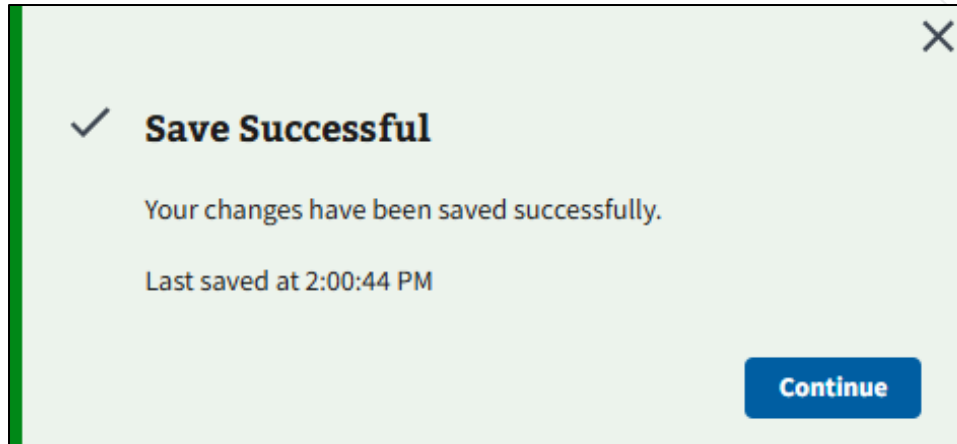


Figure 126: Save Successful Message for Multi-select Modification

14. After successfully saving the edit, the user can select the “Continue” button shown in **Figure 126** to be returned to the clinic configurations page of the specified clinic

4.4.3.2 Removing Timeslots for Multi-select Modification

1. Select the radio button next to “Remove Grid Availability” as seen in Figure 127 to remove a timeslot.

TECH WRITER TEST CLINIC

Reminder: All entries made in Timeslot Manager will overwrite any pre-existing created timeslots.

Federal Holidays & Government Payroll Calendars

Configure Entry

Select Action (*Required)

☐ Add Grid Availability

☒ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Remove timeslot entries that will not repeat. Can remove multiple entries for that day.

☐ Indefinite

Remove timeslot entries, which will repeat indefinitely on the selected day of the week. Can remove multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☒ Multi-select

Allows timeslot entries associated to that day to be removed in multiple weeks as needed. Can remove multiple entries for that day.

☐ Recurring

Recurring allows timeslots to be removed on a specified pattern. The start date must be on a future date (cannot be today).

Add Multiselect Dates

Calendar Picker

Copy/Paste Date Input

June 2026

< >

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date Input ⓘ

Manually type or select dates from the calendar...

▼

Cancel

Next: Review Changes

Figure 127: Remove Grid Availability Radio Button for Multi-select Modification

2. The user will then need to either select the specified dates from the calendar shown below in Figure 128, or by manually entering the dates via the “Date Input” field.

Configure Entry

Select Action (*Required)

☐ Add Grid Availability
☒ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day
 Remove timeslot entries that will not repeat. Can remove multiple entries for that day.

☐ Indefinite
 Remove timeslot entries, which will repeat indefinitely on the selected day of the week. Can remove multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☒ Multi-select
 Allows timeslot entries associated to that day to be removed in multiple weeks as needed. Can remove multiple entries for that day.

☐ Recurring
 Recurring allows timeslots to be removed on a specified pattern. The start date must be on a future date (cannot be today).

Add Multiselect Dates

Calendar Picker Copy/Paste Date Input

June 2026 < >

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date Input ⓘ

Manually type or select dates from the calendar... ▼

Figure 128: Calendar for Removing Grid Availability in Multi-select Modification

- After choosing the dates, the user will need to select the “Next: Review Changes” button shown in Figure 129 to review the intended changes.

Add Multiselect Dates

Calendar Picker Copy/Paste Date Input

June 2026 < >

SU	MO	TU	WE	TH	FR	SA
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Date Input ⓘ

06/02/2026 x

06/10/2026 x

06/09/2026 x

06/03/2026 x

x

▼

Cancel **Next: Review Changes**

Figure 129: Review Changes Button for Removing Multi-select Timeslots

- ❖ **Note:** When using the Multi-select timeslot type, users can choose to bulk paste dates from another source. If the user enters a date that falls on a federal holiday, in the past, or on a date more than 2 years in the future, an error message will appear (seen in Figure 130 for example).

Add Multiselect Dates

Calendar Picker **Copy/Paste Date Input**

Date Input ⓘ

06/19/2026 x 06/20/2026 x 06/21/2026 x

! Error: 06/19/2026 - Cannot schedule a date for JUNETEENTH NATIONAL INDEPENDENCE DAY

ⓘ Copy/Paste Date Input Instructions ▾

Cancel Next: Review Changes

Figure 130: Bulk Paste Example for Removing Multi-select Timeslots

4. On the Review & Save Changes page (see **Figure 131** for example), the user will need to review the timeslot changes and select the “Save Changes” button to confirm. If further changes are necessary, the user can select the “Go Back” button to return to the configuration page.

TECH WRITER TEST CLINIC**Review & Save Changes**

Review the changes to clinic availability below before proceeding. Click "Go Back" to return to the previous screen, or Save Changes to proceed.

Entry Configuration:

Modification

Remove Grid Availability

Timeslot Type

Multiselect

Date(s)

Multiple (See below)

Removed Timeslots

i The timeslots below will be removed for TECH WRITER TEST CLINIC

Date	Start Time	End Time	Slots
06/02/2026	08:00	08:30	1
06/02/2026	08:30	09:00	1
06/02/2026	09:00	09:30	1
06/02/2026	09:30	10:00	1
06/02/2026	10:00	10:30	1
06/02/2026	10:30	11:00	1
06/02/2026	11:00	11:30	1
06/02/2026	11:30	12:00	1
06/02/2026	12:00	12:30	1
06/02/2026	12:30	13:00	1

Rows per page 10 < > 1 2 3 4 5 6 7 > >

Go Back**Save Changes**

Figure 131: Review Page for Removing Multi-Select Timeslots

- The user can confirm the changes have been made successfully when the pop-up seen in Figure 132 appears.

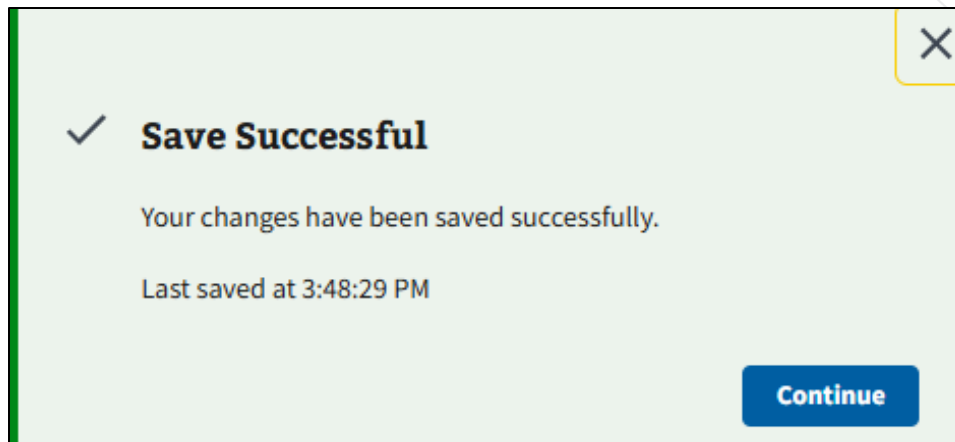


Figure 132: Save Successful for Remove Timeslot(s) in Multi-select Modification

- After successfully saving the edit, the user can select the “Continue” button shown in **Figure 132** to be returned to the clinic configurations page for the specified clinic.

4.4.4 Add or Modify Timeslots for Recurring Modification

- Select the “Timeslot Manager” button shown in Figure 133 to add a timeslot.

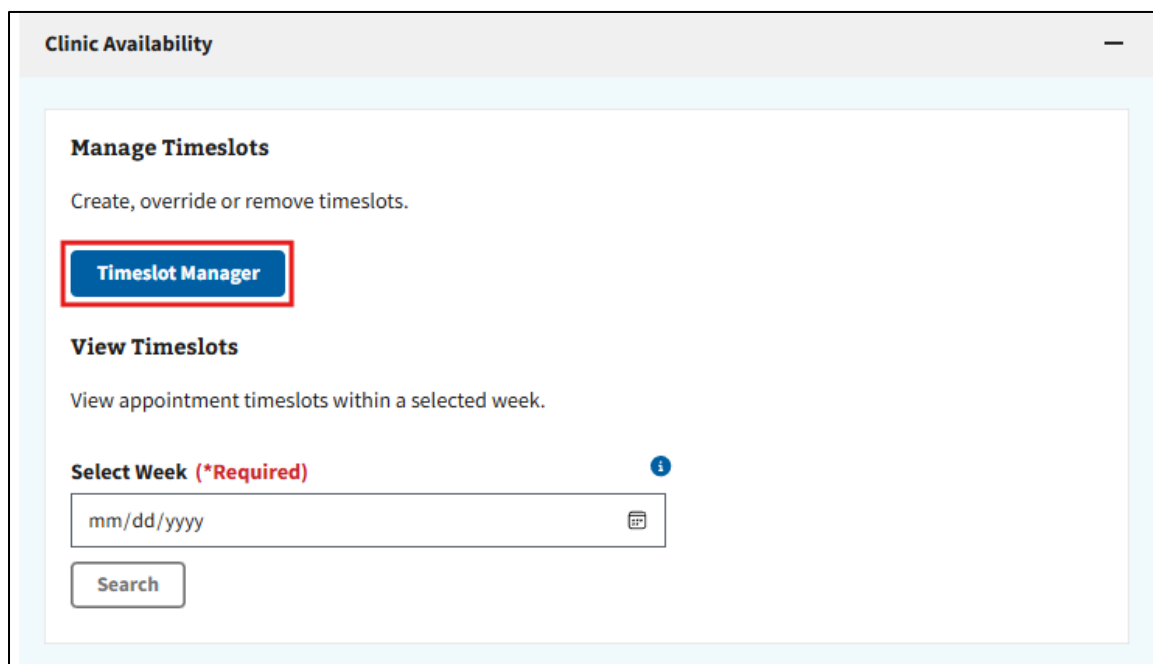


Figure 133: Timeslot Manager Button for Editing Clinic Availability for Recurring

- After selecting the “Timeslot Manager” button, the user will be taken to the Timeslot Manager page shown in Figure 134.

❖ *Note: This will allow the user to add or remove timeslots on repeat for a specified pattern. For example, if the user chooses to create timeslots for the second Sunday of every month, then that pattern will recur every month until the specified end date.*

Timeslot Manager

TECH WRITER TEST CLINIC

Reminder: All entries made in Timeslot Manager will overwrite any pre-existing created timeslots.

[Federal Holidays & Government Payroll Calendars](#) ▼

Configure Entry

Select Action (*Required)

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day
Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☐ Indefinite
Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select
Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☒ Recurring
Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Start Date (*Required)  To End Date (*Required) 

☐ Maximum End Date

Recurrence Pattern (*Required)

▼

Figure 134: Timeslot Manager Page for Recurring Modification

4.4.4.1 Adding Timeslots for Recurring Modification

1. To add a timeslot, select the radio button next to “Add Grid Availability” shown in Figure 135.

Configure Entry

Select Action (*Required)

☒ Add Grid Availability

☐ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Allows new timeslot entries that will not repeat. Can add multiple entries for that day.

☐ Indefinite

Allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select

Allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.

☒ Recurring

Allows timeslots to repeat on a specified pattern. The start date must be on a future date (cannot be today).

Start Date (*Required)

MM/DD/YYYY

To

End Date (*Required)

MM/DD/YYYY

☐ Maximum End Date

Recurrence Pattern (*Required)

Select...

Check for Cancelled Timeslots

Cancel

Next: Review Changes

Figure 135: Add Grid Availability Radio Button for Recurring Modification

- The user will then need to select a Start and End date from the dropdowns shown below in Figure 136.

Figure 136: Calendar Dropdown for Recurring Modification

❖ *Note: The user can select the “Maximum End Date” checkbox seen in Figure 136 above to auto-populate the field with the latest possible end date.*

- After selecting a date(s), the user will be prompted to check for cancelled timeslots as seen in Figure 137.

Figure 137: Check for Cancelled Timeslots Button for Recurring Modification

- ❖ *Note: If a user attempts to add timeslots to a day with previous cancellations, the following information will display after selecting “Check for Cancelled Timeslots” (see Figure 138 for example).*

Figure 138: Cancelled Timeslot Information for Recurring

4. The user will then need to select from the “Recurrence Pattern” dropdown menu seen in Figure 139.

Figure 139: Recurrence Pattern Dropdown

5. After selecting a recurrence pattern, the user will be required to specify the information and populate the fields for either a Monthly (see **Figure 140** for example) or Weekly pattern (see Figure 141 for example).

Recurrence Pattern (*Required)

Monthly

Check for Cancelled Timeslots

✓ There were no cancelled timeslots or appointments found for the selected date(s).

Monthly Pattern (*Required)

Week

The fourth of every 2 month(s).

Figure 140: Example of Monthly Recurrence Pattern

Recurrence Pattern (*Required)

Weekly

Check for Cancelled Timeslots

✓ There were no cancelled timeslots or appointments found for the selected date(s).

Recur Every 2 week(s) on:

SATURDAY

Figure 141: Example of Weekly Recurrence Pattern

6. Once all recurrence pattern information has been entered, the user will need to populate the timeslot information seen below in Figure 142.

✓ There were no cancelled timeslots or appointments found for the selected date(s).

Monthly Pattern (*Required)

Week

The fourth THURS... of every 2 month(s).

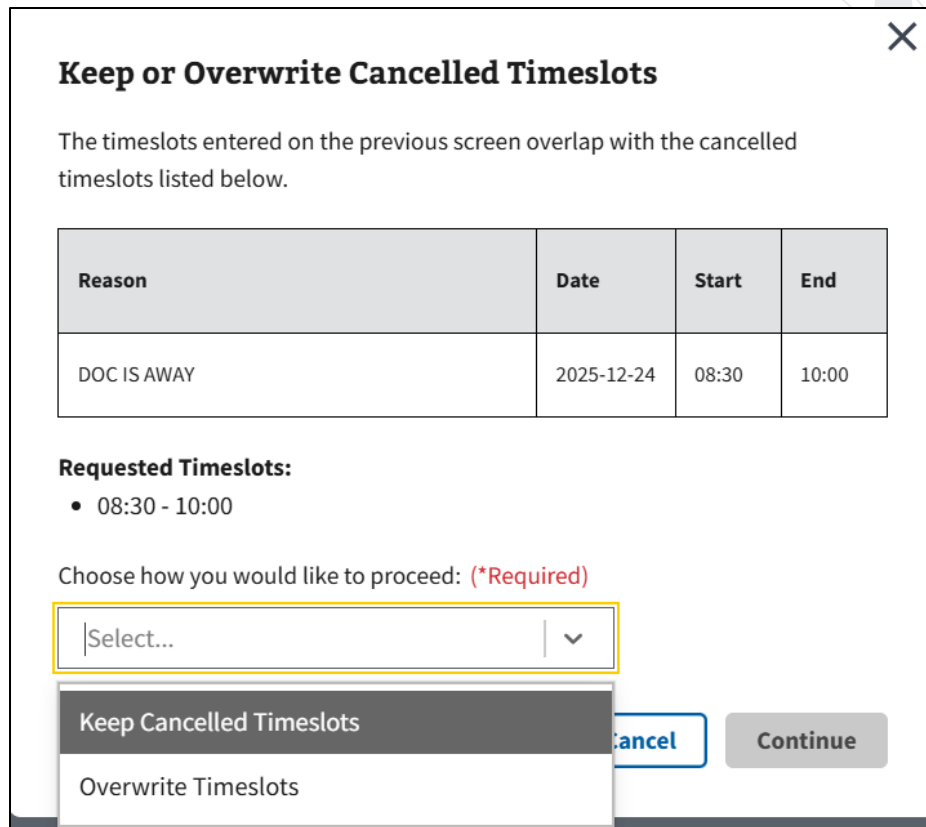
Start Time (*Required) End Time (*Required) Number of Slots (*Required)

Select... Select Start Time... 1

Cancel Next: Review Changes

Figure 142: Add Timeslot for Recurring Modification

- ❖ *Note: If a timeslot has been previously cancelled for the chosen date, the user will receive a notification prompting them to either keep the previously cancelled timeslots or overwrite the cancellation, as seen in Figure 143. After selecting an action, the user will need to select “Continue” to move forward with the modification.*



Keep or Overwrite Cancelled Timeslots

The timeslots entered on the previous screen overlap with the cancelled timeslots listed below.

Reason	Date	Start	End
DOC IS AWAY	2025-12-24	08:30	10:00

Requested Timeslots:

- 08:30 - 10:00

Choose how you would like to proceed: (*Required)

Select...

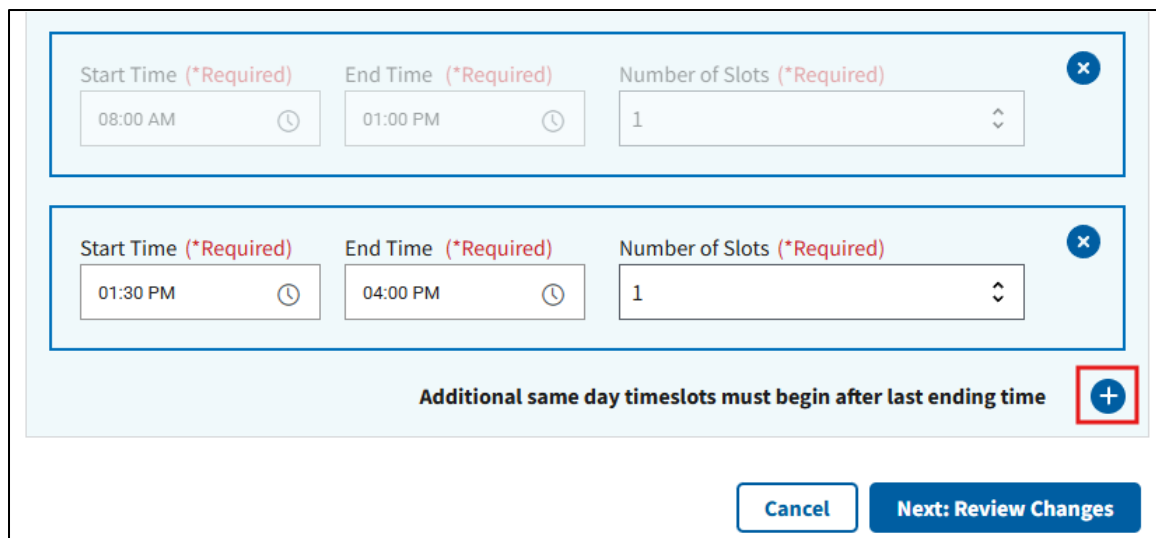
Keep Cancelled Timeslots

Overwrite Timeslots

Cancel Continue

Figure 143: Cancelled Timeslots Information for Recurring Modification

7. The user can also add multiple timeslots for the chosen days by selecting the “+” button seen in Figure 144 and populating the same required fields.



Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

01:30 PM 04:00 PM 1

Additional same day timeslots must begin after last ending time

Cancel Next: Review Changes

Figure 144: Adding Multiple Timeslots in Recurring Modification

- ❖ *Note: The user is only allowed to create multiple timeslots for different times. If duplicate or overlapping times are attempted, the user will receive the errors seen below in either Figure 145 or Figure 146.*

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM Select... 1

ERROR: Duplicate timeslot

Figure 145: Duplicate Timeslot Error for Recurring Modification

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 11:00 AM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

09:00 AM 10:00 AM 1

ERROR: Overlap Exists

Figure 146: Overlap Timeslot Error for Recurring Modification

- ❖ *Note: To remove additional timeslots, select the “x” button seen in Figure 147.*

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

08:00 AM 01:00 PM 1

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

01:30 PM 04:00 PM 1

Additional same day timeslots must begin after last ending time

Figure 147: Removing Timeslots for Recurring Modification

8. When all required information has been entered, the user can select the “Next: Review Changes” button seen in Figure 148 to continue to the next page for review.

The of every month(s).

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

Start Time (*Required) End Time (*Required) Number of Slots (*Required)

Additional same day timeslots must begin after last ending time

Figure 148: Review Changes Button for Recurring Modification

❖ *Note: The user is required to select options from the hour and minutes field in “Start Hour” for the “Next: Review Changes” button to become highlighted.*

- On the Review & Save Changes page (see **Figure 149** for example), the user will need to review the timeslot changes and select the “Save Changes” button to confirm. If further changes are necessary, the user can select the “Go Back” button to return to the configuration page.

TECH WRITER TEST CLINIC**Review & Save Changes**

Review the changes to clinic availability below before proceeding. Click "Go Back" to return to the previous screen, or Save Changes to proceed.

Entry Configuration:

Modification

Timeslot Type

Date Range

Add Grid Availability

Recurring

06/17/2026 - 06/24/2026

Pattern

Days

Every 1 weeks

WEDNESDAY

Added Timeslots

i The timeslots below will be added for TECH WRITER TEST CLINIC

Date ↑↓ :	Start Time ↑↓ :	End Time ↑↓ :	Slots ↑↓ :
06/17/2026	08:00	08:30	1
06/17/2026	08:30	09:00	1
06/17/2026	09:00	09:30	1
06/17/2026	09:30	10:00	1

Rows per page 10 < 1 >

Overwritten Timeslots

! The timeslots below will be overwritten for TECH WRITER TEST CLINIC

Date ↑↓ :	Start Time ↑↓ :	End Time ↑↓ :	Slots ↑↓ :
06/17/2026	08:00	08:30	1
06/17/2026	08:30	09:00	1
06/17/2026	09:00	09:30	1
06/17/2026	09:30	10:00	1

Rows per page 10 < 1 >

Go Back

Save Changes

Figure 149: Review Page for Adding Recurring Timeslots

10. The user can confirm the changes have been made successfully when the pop-up seen in Figure 150 appears.

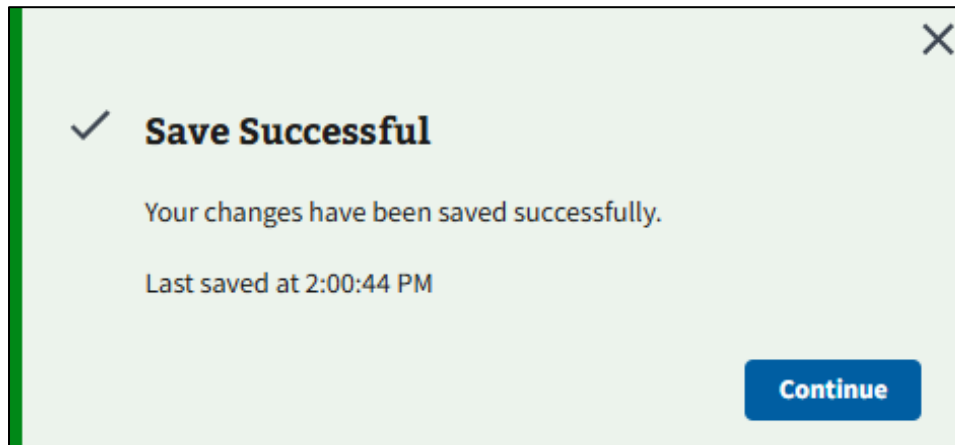


Figure 150: Save Successful Message for Recurring Modification

11. After successfully saving the edit, the user can select the “Continue” button shown in Figure 150 to be returned to the clinic configurations page of the specified clinic

4.4.4.2 Removing Timeslots for Recurring Modification

1. Select the radio button next to “Remove Grid Availability” as seen in Figure 151 to remove a timeslot.

Configure Entry

Select Action (*Required)

☐ Add Grid Availability

☒ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Remove timeslot entries that will not repeat. Can remove multiple entries for that day.

☐ Indefinite

Remove timeslot entries, which will repeat indefinitely on the selected day of the week. Can remove multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select

Allows timeslot entries associated to that day to be removed in multiple weeks as needed. Can remove multiple entries for that day.

☒ Recurring

Recurring allows timeslots to be removed on a specified pattern. The start date must be on a future date (cannot be today).

Start Date (*Required)

MM/DD/YYYY

To

End Date (*Required)

MM/DD/YYYY

☐ Maximum End Date

Recurrence Pattern (*Required)

Select...

Cancel

Next: Review Changes

Figure 151: Remove Grid Availability Radio Button for Recurring Modification

- The user will then need to select a Start and End date from the dropdowns shown below in Figure 152.

Configure Entry

Select Action (*Required)

☐ Add Grid Availability

☒ Remove Grid Availability

Choose Timeslot Type (*Required)

☐ Single Day

Remove timeslot entries that will not repeat. Can remove multiple entries for that day.

☐ Indefinite

Remove timeslot entries, which will repeat indefinitely on the selected day of the week. Can remove multiple entries for that day. The indefinite time is extended and aligned to the number of days as seen in the Max Days for Future Booking value.

☐ Multi-select

Allows timeslot entries associated to that day to be removed in multiple weeks as needed. Can remove multiple entries for that day.

☒ Recurring

Recurring allows timeslots to be removed on a specified pattern. The start date must be on a future date (cannot be today).

Start Date (*Required)

MM/DD/YYYY

Calendar icon

To

End Date (*Required)

MM/DD/YYYY

Calendar icon

☐ Maximum End Date

Recurrence Pattern (*Required)

Select...

▼

Cancel

Next: Review Changes

Figure 152: Calendar Dropdown for Removing Grid Availability in Recurring Modification

- The user will also need to select from the “Recurrence Pattern” dropdown menu seen in Figure 153.

Start Date (*Required) 06/03/2026 To End Date (*Required) 06/03/2028

☒ Maximum End Date

Recurrence Pattern (*Required)

Select...

Weekly

Monthly

Cancel Next: Review Changes

Figure 153: Recurrence Pattern Dropdown for Removing Grid Availability

4. After selecting a recurrence pattern, the user will be required to specify the information and populate the fields for either a Monthly (see Figure 154 for example) or Weekly pattern (see Figure 155 for example).

Recurrence Pattern (*Required)

Monthly

Monthly Pattern (*Required)

Week

The fourth of every 2 month(s).

Figure 154: Example of Monthly Recurrence Pattern for Removing Grid Availability

Recurrence Pattern (*Required)

Weekly

Recur Every 2 week(s) on:

SATURDAY

Figure 155: Example of Weekly Recurrence Pattern for Removing Grid Availability

5. Once all recurrence pattern information has been entered, the user will need to select the “Next: Review Changes” button shown in **Figure 156** to review the intended changes.

Start Date (*Required) 06/03/2026 To End Date (*Required) 06/03/2028

☒ Maximum End Date

Recurrence Pattern (*Required) Monthly

Monthly Pattern (*Required) Week

The fourth SATUR... of every 2 month(s).

Cancel Next: Review Changes

Figure 156: Review Changes Button for Removing Recurring Timeslots

6. On the Review & Save Changes page (see **Figure 157** for example), the user will need to review the timeslot changes and select the “Save Changes” button to confirm. If further changes are necessary, the user can select the “Go Back” button to return to the configuration page.

TECH WRITER TEST CLINIC**Review & Save Changes**

Review the changes to clinic availability below before proceeding. Click "Go Back" to return to the previous screen, or Save Changes to proceed.

Entry Configuration:

Modification

Remove Grid Availability

Timeslot Type

Recurring

Date Range

06/03/2026 - 06/03/2028

Pattern

The fourth WEDNESDAY of every 2 months

Removed Timeslots

i The timeslots below will be removed for TECH WRITER TEST CLINIC

Date ↑↓ :	Start Time ↑↓ :	End Time ↑↓ :	Slots ↑↓ :
06/24/2026	08:00	08:30	1
06/24/2026	08:30	09:00	1
06/24/2026	09:00	09:30	1
06/24/2026	09:30	10:00	1
06/24/2026	10:00	10:30	1
06/24/2026	10:30	11:00	1
06/24/2026	11:00	11:30	1
06/24/2026	11:30	12:00	1
06/24/2026	12:00	12:30	1
06/24/2026	12:30	13:00	1

Rows per page 10 1 < 2 3 4 5 ... 22 > >|

Go Back

Save Changes

Figure 157: Review Page for Removing Recurring Timeslots

- The user can confirm the changes have been made successfully when the pop-up seen in Figure 158 appears.

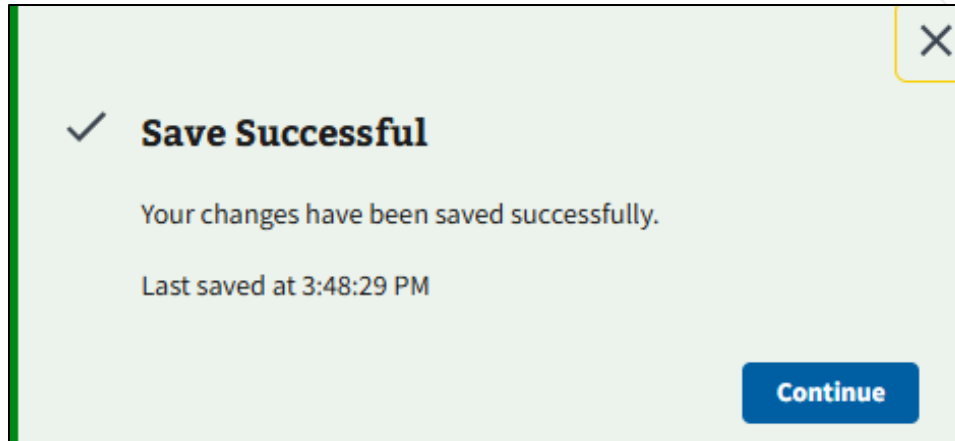


Figure 158: Save Successful for Remove Timeslot(s) in Recurring Modification

8. After successfully saving the edit, the user can select the “Continue” button shown in Figure 158 to be returned to the clinic configurations page for the specified clinic.

4.5 Cancelling and Restoring Timeslots

Disclaimer: This section of the guide is only applicable to users with access permissions SDCANCEL for timeslot cancellations and SDRESTORE for timeslot restorations. If the user does not have elevated access permissions set to their VistA account, the user will not see the “Cancel Timeslot(s)” or “Restore” buttons seen in Figure 159. If a user needs access to make changes on this application, please contact the local Clinical Applications Coordinator or Supervisor for assistance.

...	December 24, 2025	08:00	08:30	1 of 1	No
Cancel Timeslot(s)...		08:30	09:00	1 of 1	No
...	December 24, 2025	11:00	17:00	0 of 1	No
Restore	December 26, 2025	08:00	08:30	1 of 1	No

Figure 159: Cancel and Restore Buttons for Timeslots

To cancel and restore clinic timeslots, the user will first need to search and select a clinic within the Clinic Configurations tab. Once a clinic is selected, the user will need to search for a date and then select it within the Clinic Availability accordion (see Figure 160).

Clinic Availability

Manage Timeslots

Create, override or remove timeslots.

Timeslot Manager

View Timeslots

View appointment timeslots within a selected week.

Select Week (*Required)

12/24/2025

Search

Figure 160: Date Search for Cancel and Restore

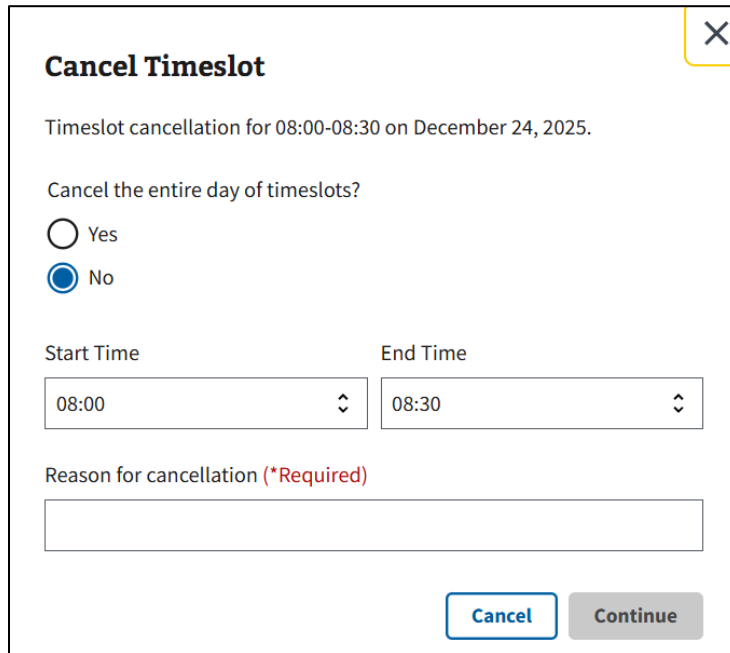
4.5.1 Cancelling a Timeslot

1. After searching for a specific date, the user will be shown a full week of scheduling clinic availability. The user will then click the ellipsis next to the necessary timeslot and select the “Cancel Timeslot(s)” button seen in Figure 161.

Actions	Date	Start Time	End Time	Slots Available	Overbooked	Cancelled
...	December 23, 2025	11:00	11:30	1 of 1	No	No
...	December 23, 2025	11:30	12:00	1 of 1	No	No
...	December 23, 2025	12:00	12:30	1 of 1	No	No
...	December 23, 2025	12:30	13:00	1 of 1	No	No
...	December 24, 2025	08:00	08:30	1 of 1	No	No
Cancel Timeslot(s)...	December 24, 2025	08:30	09:00	1 of 1	No	No

Figure 161: Cancel Timeslot Button

2. After selecting the “Cancel Timeslot(s)” button, the pop-up window shown in Figure 162 will appear.

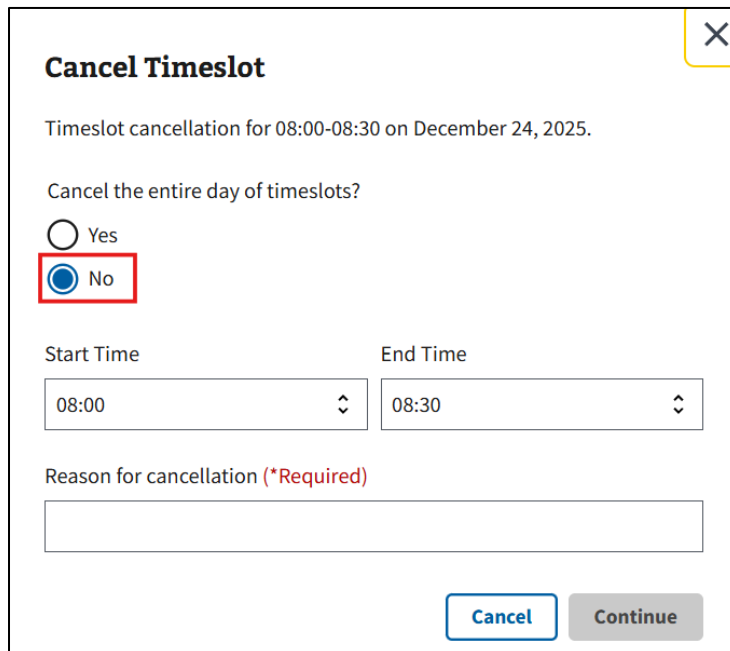


A screenshot of a 'Cancel Timeslot' pop-up window. The window has a title bar with a close button (X). The main content area contains the following elements: a title 'Cancel Timeslot', a subtitle 'Timeslot cancellation for 08:00-08:30 on December 24, 2025.', a question 'Cancel the entire day of timeslots?' with two radio button options: 'Yes' (unselected) and 'No' (selected). Below this are two time selection fields: 'Start Time' (08:00) and 'End Time' (08:30), both with dropdown arrows. A text input field for 'Reason for cancellation (*Required)' is present. At the bottom are two buttons: 'Cancel' (highlighted with a blue border) and 'Continue' (disabled, greyed out).

Figure 162: Cancel Timeslot Window

4.5.1.1 Cancelling for a Single Timeslot

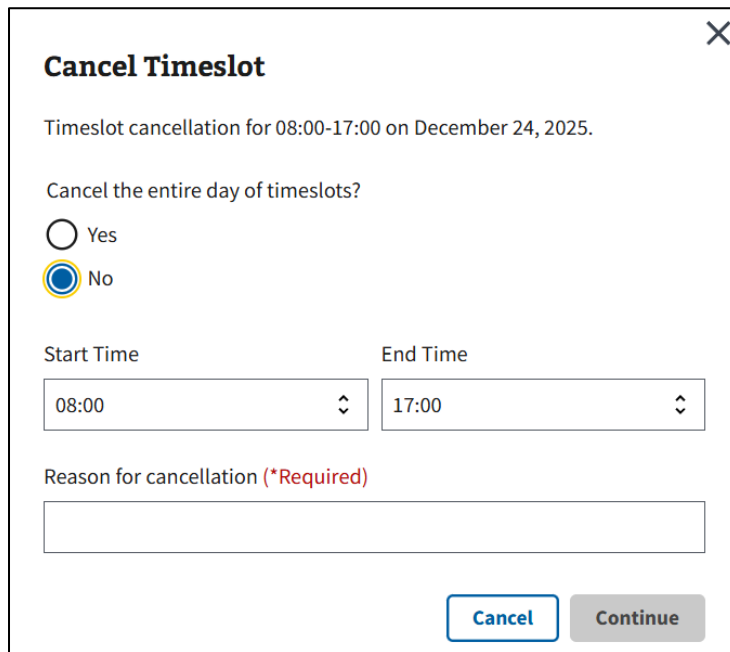
1. To cancel for a single timeslot, the user will need to select “No” on the Cancel Timeslot window seen in Figure 163.



A screenshot of the 'Cancel Timeslot' pop-up window, identical to Figure 162. In this version, the 'No' radio button under the question 'Cancel the entire day of timeslots?' is highlighted with a red rectangular box, indicating the correct selection for cancelling a single timeslot.

Figure 163: Single Timeslot Cancellation Option

- Next, the user can choose to cancel the single timeslot seen at the top of the window. Optionally, the user may also enter a start and end time or cancel multiple consecutive timeslots, as seen below in **Figure 164**.



Cancel Timeslot

Timeslot cancellation for 08:00-17:00 on December 24, 2025.

Cancel the entire day of timeslots?

☐ Yes

☒ No

Start Time End Time

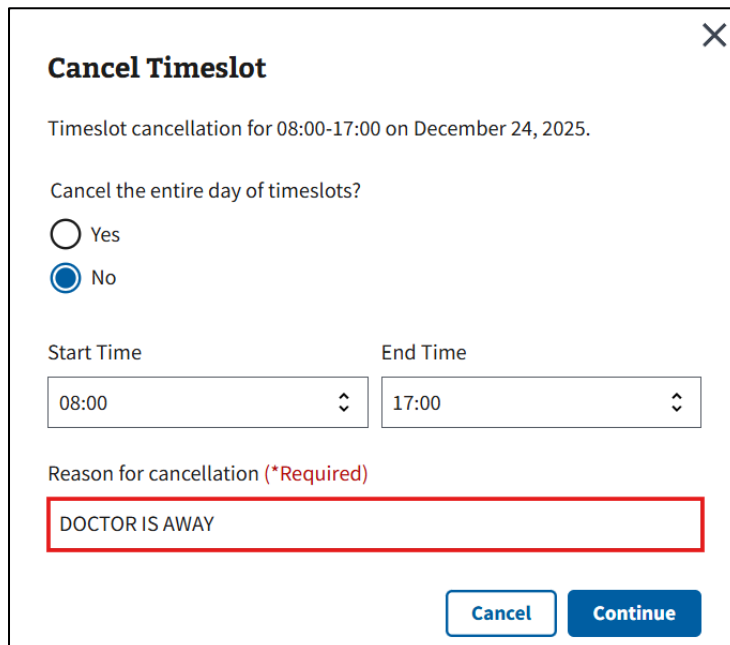
08:00 17:00

Reason for cancellation (*Required)

Cancel Continue

Figure 164: Manual Time Entered for Timeslot Cancellation Example

- The user will then need to enter a reason for cancellation into the box seen in Figure 165 and select the “Continue” button to proceed with cancelling the timeslot.



Cancel Timeslot

Timeslot cancellation for 08:00-17:00 on December 24, 2025.

Cancel the entire day of timeslots?

☐ Yes

☒ No

Start Time End Time

08:00 17:00

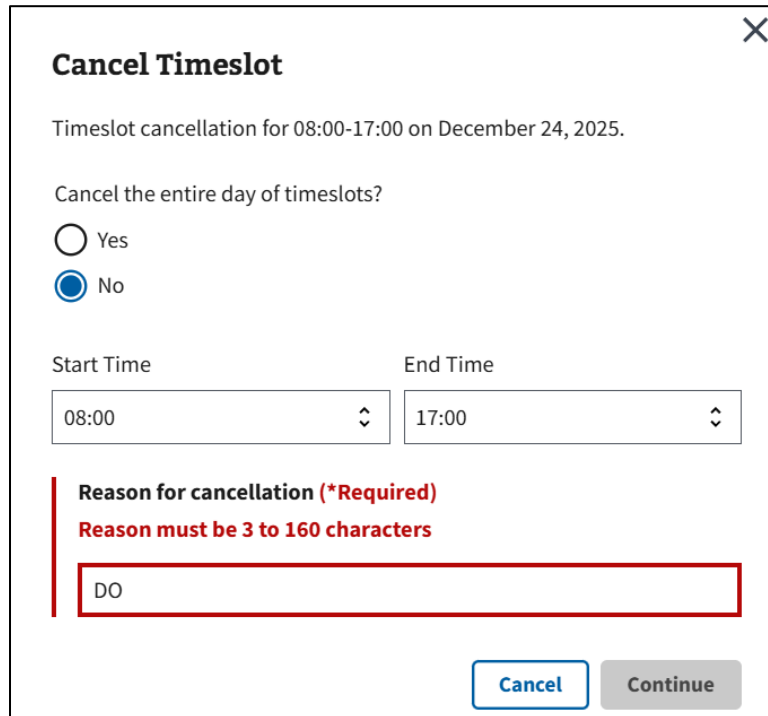
Reason for cancellation (*Required)

DOCTOR IS AWAY

Cancel Continue

Figure 165: Reason for Cancellation Example for Single Timeslot Cancellation

- ❖ *Note: The user is only allotted 3 to 30 characters. Going under the minimum or over the maximum amount will result in the error shown in Figure 166.*



Cancel Timeslot [X]

Timeslot cancellation for 08:00-17:00 on December 24, 2025.

Cancel the entire day of timeslots?

☐ Yes

☒ No

Start Time: 08:00 [dropdown arrow]

End Time: 17:00 [dropdown arrow]

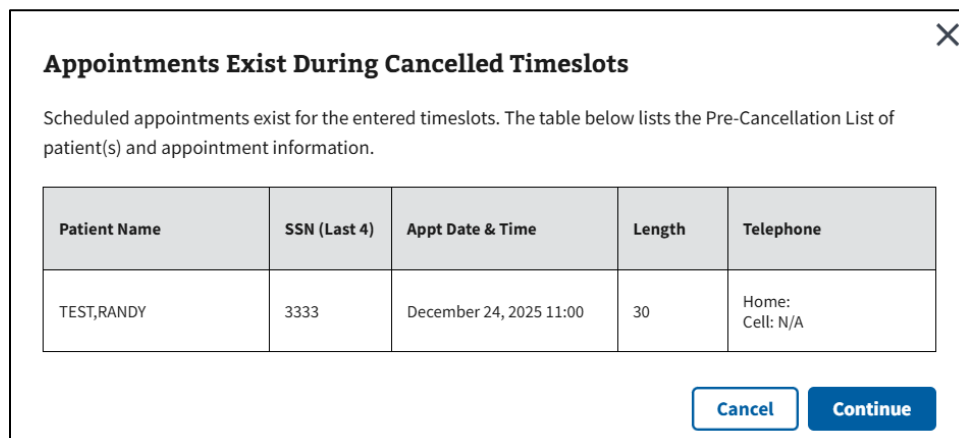
Reason for cancellation (*Required)
Reason must be 3 to 160 characters

DO [text input field]

[Cancel] [Continue]

Figure 166: Reason for Cancellation Error for Single Timeslot Cancellation

- ❖ *Note: If the user attempts to cancel a timeslot with patient association, the user will receive the window shown below in Figure 167. The user can then choose to either continue with cancellation or return to the grid.*



Appointments Exist During Cancelled Timeslots [X]

Scheduled appointments exist for the entered timeslots. The table below lists the Pre-Cancellation List of patient(s) and appointment information.

Patient Name	SSN (Last 4)	Appt Date & Time	Length	Telephone
TEST,RANDY	3333	December 24, 2025 11:00	30	Home: Cell: N/A

[Cancel] [Continue]

Figure 167: Patient Association Window for Single Timeslot Cancellation

- The user can confirm the changes have been made successfully when the pop-up seen in Figure 168 appears. The user can select “Continue” to return to the grid.

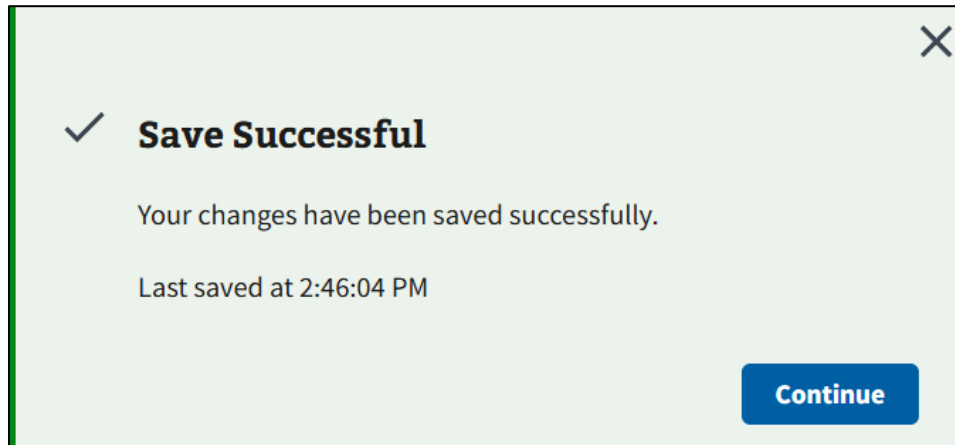


Figure 168: Save Successful for Cancelling Single Timeslot

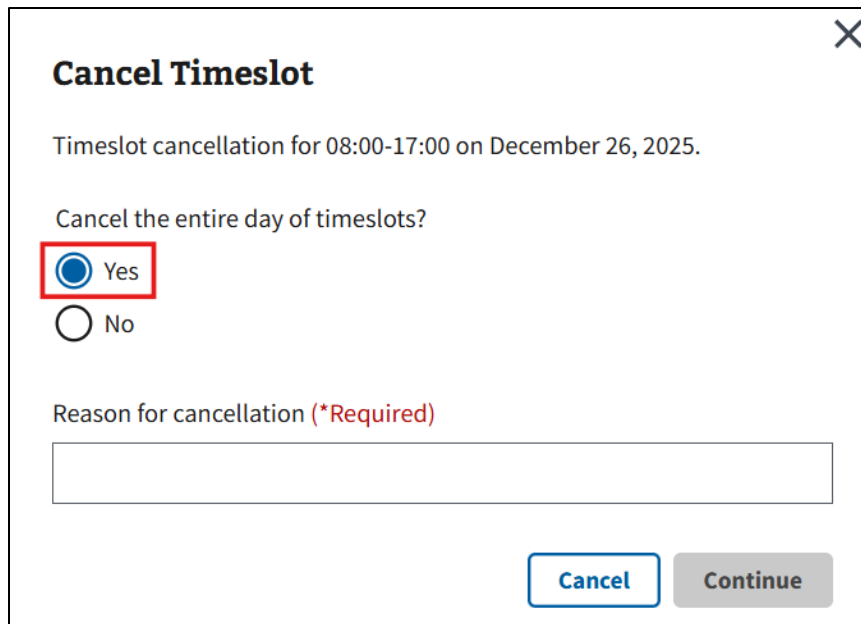
- ❖ *Note: The grid will say “Yes/Blocked” within the Cancelled column for single timeslot cancellations (see Figure 169).*

Actions	Date ▼	Start Time ↓	End Time	Slots Available	Overbooked	Cancelled
...	December 24, 2025	11:00	17:00	0 of 1	No	YES/Blocked
...	December 24, 2025	10:30	11:00	1 of 1	No	No

Figure 169: Single Timeslot Cancellation Example in Grid

4.5.1.2 Entire Day Cancellation

- To cancel timeslots for the entire day, the user will need to select “Yes” on the Cancel Timeslot window seen in Figure 170.



Cancel Timeslot

Timeslot cancellation for 08:00-17:00 on December 26, 2025.

Cancel the entire day of timeslots?

☒ Yes

☐ No

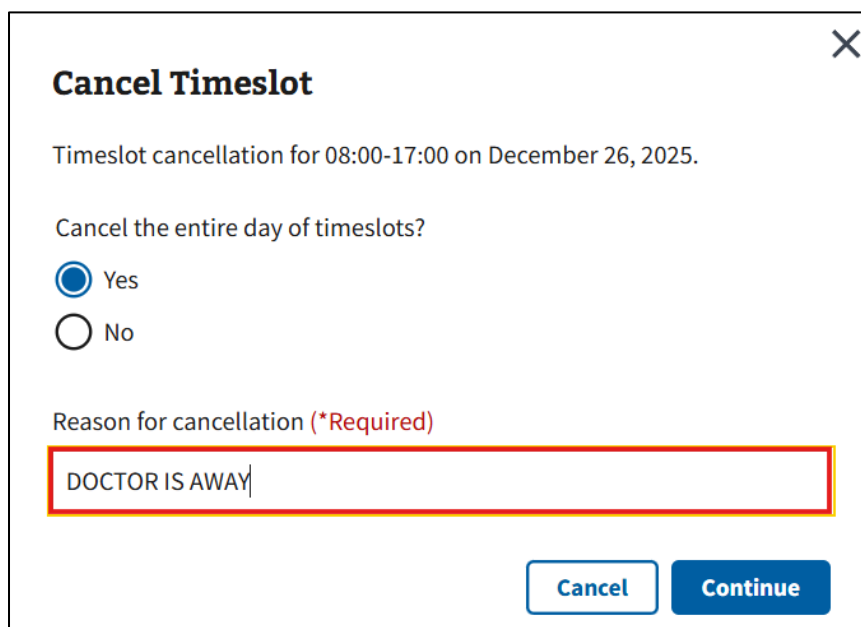
Reason for cancellation (*Required)

Cancel **Continue**

Figure 170: Entire Day Timeslot Cancellation Option

- ❖ **Note:** The user will not be able to cancel timeslots for the entire day if there is already an existing timeslot block for the same day. To cancel the entire day, the user will either need to cancel timeslots one at a time or restore the timeslot block so that the option becomes available (See section 4.5.2 **Restoring a Timeslot** for information on restoring timeslots).

2. The user will then need to enter a reason for cancellation into the box seen in Figure 171 and select the “Continue” button to proceed with cancelling all timeslots.



Cancel Timeslot

Timeslot cancellation for 08:00-17:00 on December 26, 2025.

Cancel the entire day of timeslots?

☒ Yes

☐ No

Reason for cancellation (*Required)

DOCTOR IS AWAY

Cancel **Continue**

Figure 171: Reason for Cancellation Example for Entire Day Cancellation

- ❖ *Note: The user is only allotted 3 to 30 characters. Going under the minimum or over the maximum amount will result in the error shown in Figure 172.*

Cancel Timeslot

Timeslot cancellation for 08:00-17:00 on December 26, 2025.

Cancel the entire day of timeslots?

☒ Yes

☐ No

Reason for cancellation (*Required)
Reason must be 3 to 160 characters

DO

Cancel Continue

Figure 172: Reason for Cancellation Error for Entire Day Cancellation

- ❖ *Note: If the user attempts to cancel timeslots with patient association, the user will receive the window seen below in **Figure 173**. The user can then choose to either continue with cancellation of the entire day or return to the grid.*

Appointments Exist During Cancelled Timeslots

Scheduled appointments exist for the entered timeslots. The table below lists the Pre-Cancellation List of patient(s) and appointment information.

Patient Name	SSN (Last 4)	Appt Date & Time	Length	Telephone
TEST,RANDY	3333	December 24, 2025 11:00	30	Home: Cell: N/A

Cancel Continue

Figure 173: Patient Association Window for Entire Day Timeslots Cancellation

- The user can confirm the changes have been made successfully when the pop-up seen in Figure 174 appears. The user can select “Continue” to return to the grid.

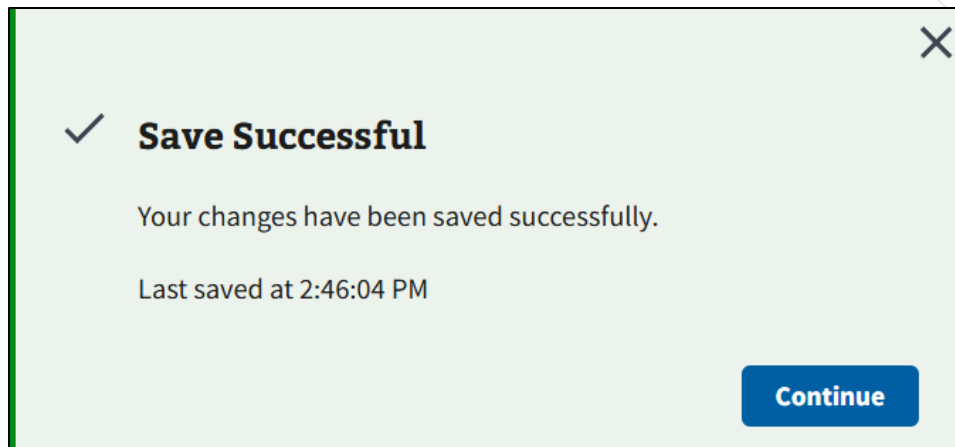


Figure 174: Save Successful for Cancelling All Timeslots

- ❖ **Note:** The grid will say “Yes/Cancelled” within the Cancelled column for entire day timeslot cancellations (see Figure 175).

Actions	Date	Start Time	End Time	Slots Available	Overbooked	Cancelled
...	December 26, 2025	08:00	16:45	0 of 1	No	YES/Cancelled
...	December 26, 2025	16:45	18:00	0 of 0	No	YES/Cancelled

Figure 175: Entire Day Timeslot Cancellation Example in Grid

4.5.2 Restoring a Timeslot

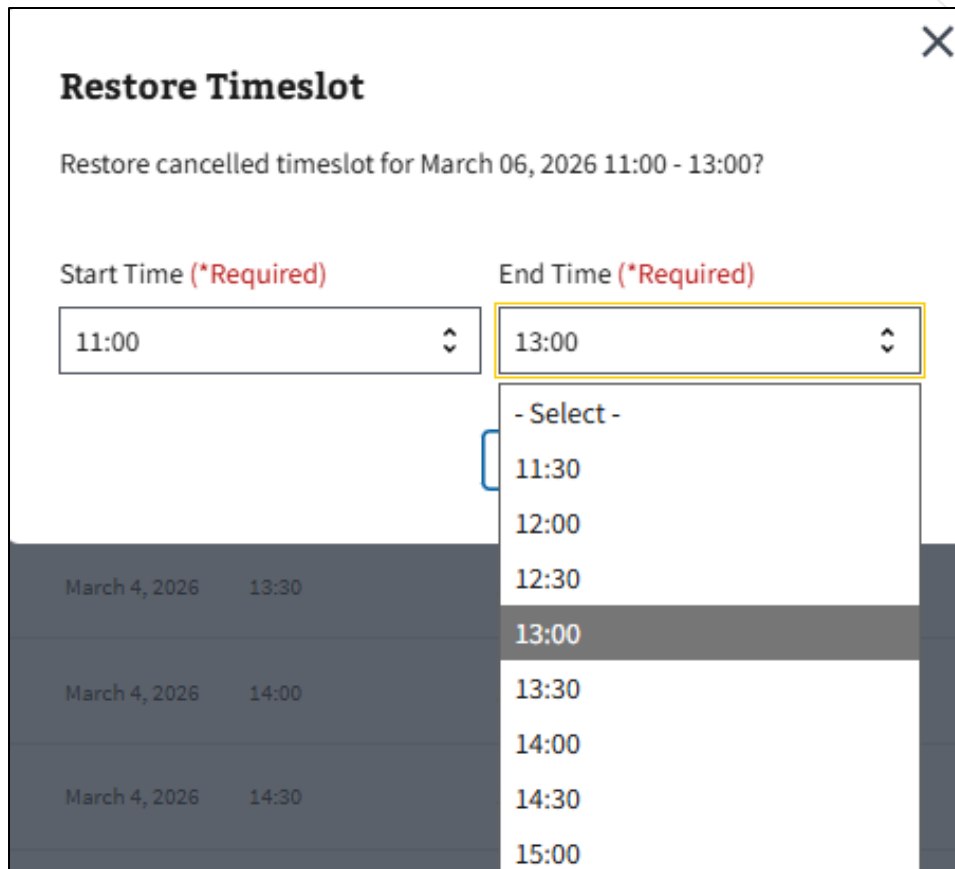
4.5.2.1 Restoring for a Single Day Timeslot

- After searching for a specific date, the user will be shown a full week of scheduling clinic availability. The user will then click the ellipsis next to the necessary timeslot, or grouping of multiple consecutive timeslots, and select the “Restore” button seen in Figure 176.

Actions	Date	Start Time	End Time	Slots Available	Overbooked	Cancelled
...	March 6, 2026	11:00	15:00	0 of 1	No	YES/Blocked
Restore	March 7, 2026	08:00	11:45	0 of 1	No	YES/Cancelled

Figure 176: Restore Timeslot Button for Single Timeslot Restoration

- The Restore Timeslot window will appear. From here, the user can then choose to restore the entire blocked timeslot or select a start and end time to restore from the blocked period via the dropdown seen below in **Figure 177**.



Restore Timeslot

Restore cancelled timeslot for March 06, 2026 11:00 - 13:00?

Start Time (*Required) End Time (*Required)

11:00 13:00

- Select -

- 11:30
- 12:00
- 12:30
- 13:00
- 13:30
- 14:00
- 14:30
- 15:00

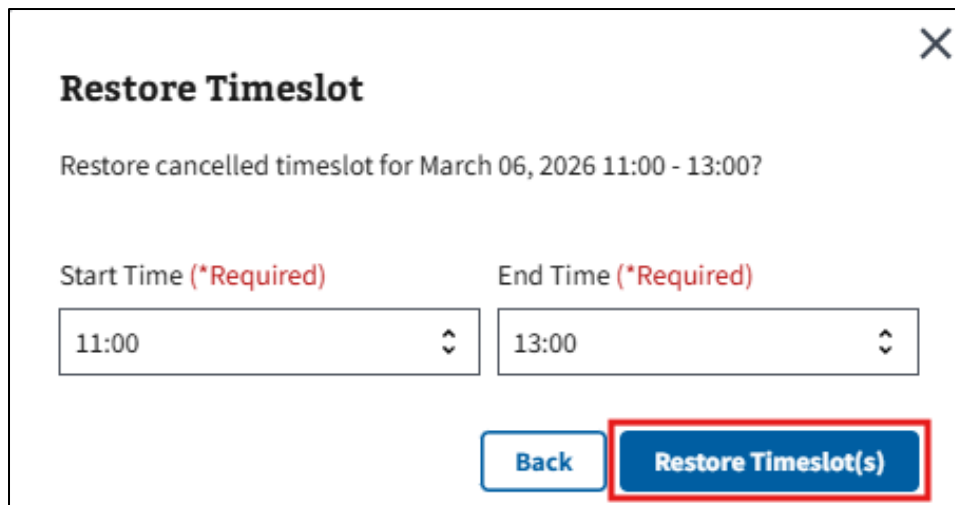
March 4, 2026 13:30

March 4, 2026 14:00

March 4, 2026 14:30

Figure 177: Restore Timeslot Window for Single Timeslot

- After choosing the required times, the user will need to select the “Restore Timeslot(s)” button shown in **Figure 178** save the intended changes.



Restore Timeslot

Restore cancelled timeslot for March 06, 2026 11:00 - 13:00?

Start Time (*Required) End Time (*Required)

11:00 13:00

Back **Restore Timeslot(s)**

Figure 178: Restore Timeslot(s) Button for Single Day Timeslot

- The user can confirm the changes have been made successfully when the pop-up seen in Figure 179 appears. The user can select “Continue” to return to the grid.

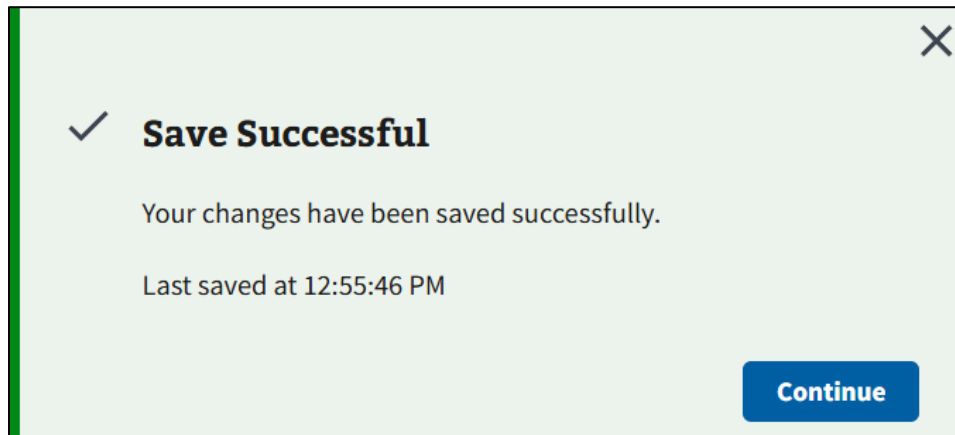


Figure 179: Save Successful Window for Single Timeslot Restoration

4.5.2.2 Entire Day Restoration

- After searching for a specific date, the user will be shown a full week of scheduling clinic availability. The user will then click the ellipsis next to the necessary timeslot and select the “Restore” button seen in Figure 180.

Actions	Date	Start Time	End Time	Slots Available	Overbooked	Cancelled
...	December 26, 2025	08:00	16:45	0 of 1	No	YES/Cancelled
Restore	December 26, 2025	16:45	18:00	0 of 0	No	YES/Cancelled

Figure 180: Restore Timeslot Button for Entire Day Restoration

- The Restore Timeslot window will appear. The user will need to select the “Submit” button, seen below in Figure 181, to continue with restoring timeslots for the entire day.

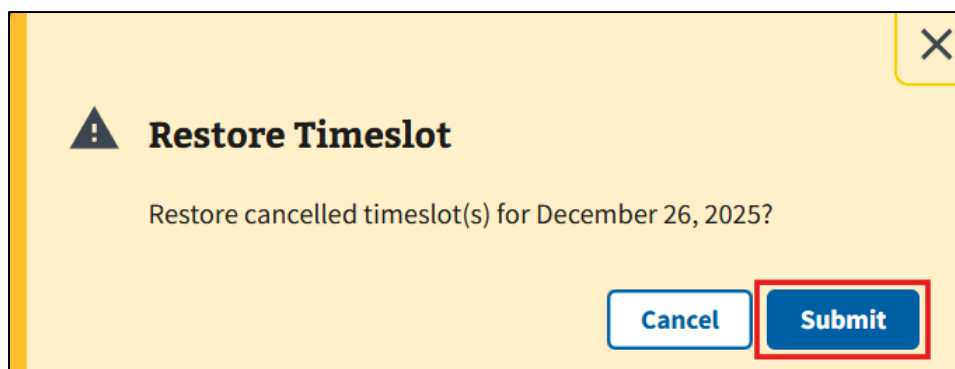


Figure 181: Restore Timeslot Window for Entire Day Timeslots Restoration

- The user can confirm the changes have been made successfully when the pop-up seen in Figure 182 appears. The user can select “Continue” to return to the grid.

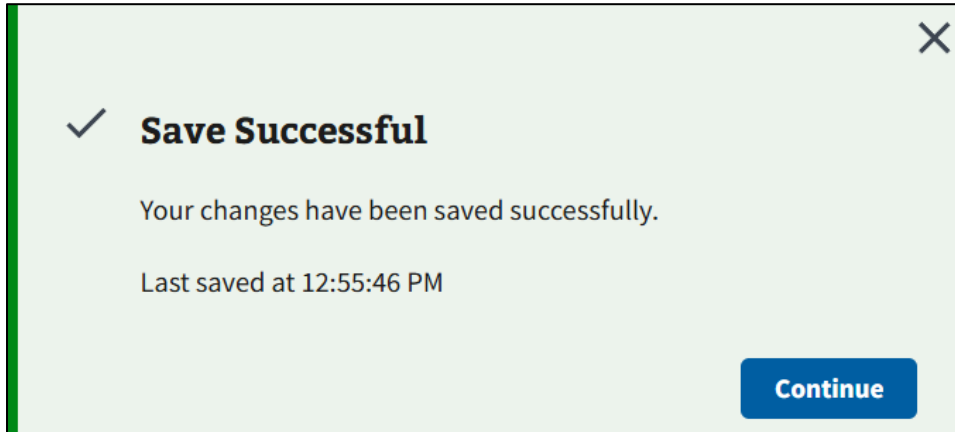


Figure 182: Save Successful Window for Entire Day Timeslots Restoration

4.6 Creating a New Clinic

*Disclaimer: This section of the guide is only applicable to users with the correct write access permissions. If the user does not have write access permissions set to the account, the user will receive the error message shown in **Figure 183**. If a user needs access to make changes on this application, please contact the local Clinical Applications Coordinator or Supervisor for assistance.*

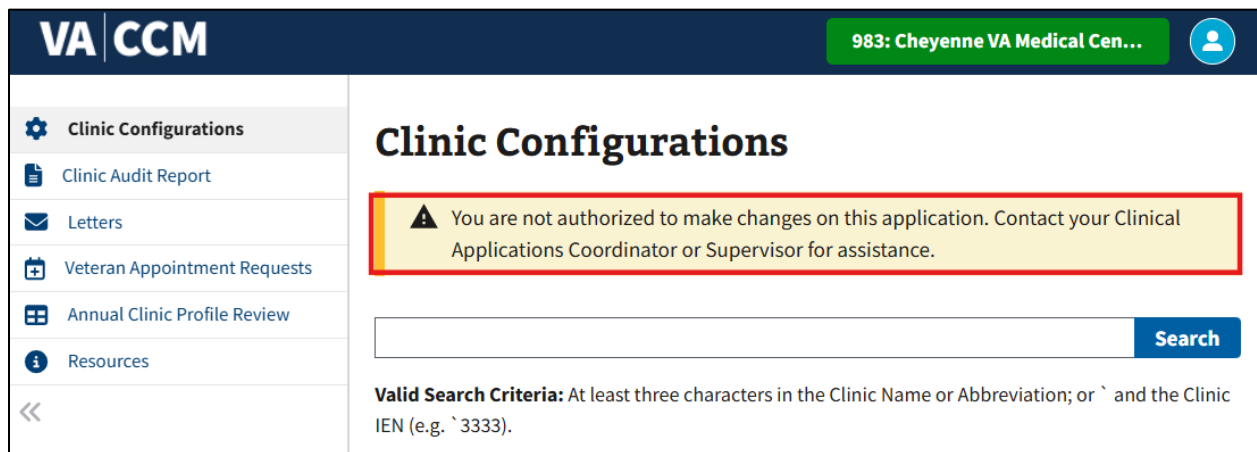


Figure 183: Authorization Error Message for Creating a Clinic

- To create a new clinic, the users must select the “Create New Clinic” button seen in Figure 184 under the Clinic Configurations tab. Selecting the button will cause the Create New Clinic page shown in Figure 185 to appear.

Figure 184: Create a Clinic Button

- The user will then see three configuration accordions: Mandatory Fields, Preselected Settings, and Optional Settings, which can be viewed and edited by selecting the “+” shown in Figure 185. Optionally, the user can select the “Expand All” button to open all accordions at once.

Figure 185: Create a Clinic Accordions

- ❖ **Note:** Users can choose to automatically expand the accordions on the Create New Clinic page via the Preferences settings. Please see section **2.2.1.3 Default Create New Clinic Accordion Preferences** for more information.
 - ❖ **Note:** Please see sections **4.6.1 Mandatory Fields**, **4.6.2 Preselected Settings**, and **4.6.3 Optional Settings** for examples of the accordions.
- Once the required fields have been correctly filled, the “Create Clinic” button seen in **Figure 186** will appear. If not entered correctly, the button will remain greyed out.

Create New Clinic

Create a new clinic for this location.

[Expand all +](#)

Mandatory Fields	+
Preselected Default Fields	+
Optional Fields	+

[Create Clinic](#)

Figure 186: Create a Clinic Button after Entering Required Information

- ❖ *Note: The user must create a clinic before timeslots can be added; this function cannot be done in the process of creation. After creating a new clinic, the UI will immediately take the user to the Edit Clinic Availability section to add timeslots associated to the clinic. Please refer to the section **Editing Clinic Configurations** for guidance.*

4.6.1 Mandatory Fields

Users with Write Access can edit the fields that will appear within Mandatory Fields shown below in Figure 187. The field(s) labeled “Required” must be edited before saving. Once all the mandatory fields have been populated with data, a new clinic can be created.

Mandatory Fields		
Clinic Name (*Required) <i>i</i>	Patient Friendly Name (*Required) <i>i</i>	Stop Code (Primary) (*Required) <i>i</i>
		Search Stop Code <i>v</i>
Select Provider(s) (*Required) <i>i</i>	Medical Center Division (*Required) <i>i</i>	Length of Appointments (*Required) <i>i</i>
Enter Name(s) <i>v</i>	Search Division <i>v</i>	
Physical Location (*Required) <i>i</i>	Telephone (*Required) <i>i</i>	Telephone Extension (*Required) <i>i</i>

Figure 187: Editing Mandatory Fields for Create a Clinic

- ❖ *Note: Please go to Section 9.2 Tool Tip Descriptions for more information on populating clinic settings.*
- ❖ *Note: Users will receive the error message shown in Figure 188 if users fail to populate any of the required fields.*

! Validation errors are present

Expand accordion panels to correct errors in the following form inputs.

- Clinic Name
- Patient Friendly Name
- Stop Code (Primary)
- Length of Appointments
- Medical Center Division
- Telephone
- Telephone Extension
- Select Provider(s)
- Physical Location

Please correct all validation errors before creating or updating a clinic.

Figure 188: Error Message from Lack of Required Fields

4.6.2 Preselected Settings

Users with Write Access can edit the fields that will appear within Preselected Fields shown below in Figure 189.

Preselected Default Fields

Clinic Meets at This Facility?

☒ Yes
☐ No

Allow Direct Patient Scheduling?

☐ Yes
☒ No

Non-count Clinic?

☐ Yes
☒ No

Variable Appointment Length?

☐ Yes
☒ No

Display Appointments to Patients?

☒ Yes
☐ No

Schedule on Holidays?

☐ Yes
☒ No

Hour Clinic Display Begins (MST)

08:00

Default Appointment Type

REGULAR

Max Days for Future Booking

390

Display Increments Per Hour

30

Overbooks Per Day Maximum

0

Max # of Days for Auto-Rebook

1

E-checkin Allowed?

☐ Yes
☒ No

Administer Inpatient Meds?

☒ Yes
☐ No

Workload Validation at Check Out?

☒ Yes
☐ No

Service Code

NONE

Number No Shows Allowed

0

Start Time for Auto-Rebook

16

Pre-checkin Allowed?

☐ Yes
☒ No

Allow Vets Self Cancel?

☐ Yes
☒ No

Figure 189: Editing Preselected Default Fields for Create a Clinic

❖ **Note:** Please go to Section **9.2 Tool Tip Descriptions** for more information on populating clinic settings.

4.6.3 Optional Settings

Users with Write Access can edit the fields that will appear within Optional Settings shown below in Figure 190.

Optional Fields

Abbreviations Credit Stop Code (Secondary) Select Default Provider

Search Credit Stop Code

Clinic Cancellation Letter No Show Letter Pre-Appointment Letter

Select... Select... Select...

Appointment Cancellation Letter Special Instructions [See Full Special Instructions](#)

Select... TEST INSTRU...

Prohibit Access to Clinic?

☐ Yes

☒ No

Figure 190: Editing Optional Fields for Create a Clinic

- ❖ **Note:** Please go to Section **9.2 Tool Tip Descriptions** for more information on populating clinic settings.

4.7 Inactivating and Reactivating a Clinic

Disclaimer: This section of the guide is only applicable to users with access permissions SD INACTIVATE for inactivation and SD REACT for reactivation. If the user does not have elevated access permissions set to their Vista account, the user will not see the “Inactivate Clinic” button seen in Figure 191. If a user needs access to make changes on this application, please contact the local Clinical Applications Coordinator or Supervisor for assistance.

[Clinic Configurations](#) > **TECH WRITER TEST CLINIC**

TECH WRITER TEST CLINIC

ACTIVE

Edit the clinic details for this location. Note that some fields may not be edited.

Clinic Actions ^

View Clinic Data

Inactivate Clinic

Expand all +

Figure 191: Inactivate Clinic Button

4.7.1 Inactivating a Clinic

1. To inactivate a clinic, the user will first need to search and select a clinic within the Clinic Configurations tab (see Figure 192).

⚙ Clinic Configurations

📄 Clinic Audit Report

✉ Letters

📅 Veteran Appointment Requests

📋 Annual Clinic Profile Review

📁 Resources

⏪

Clinic Configurations

959 Cheyenne VA Medical Center

Create or edit the clinic configuration settings for this location.

Valid Search Criteria: At least three characters in the Clinic Name or Abbreviation; or ` and the Clinic IEN (e.g. `3333).

Figure 192: Clinic Search Example for Inactivating a Clinic

- ❖ **Note:** When trying to inactivate a clinic, the user will receive the error seen in **Figure 193** if patients are actively scheduled. Ensure that all future appointments have been canceled to move forward with inactivation.

✕

!

Error Saving Changes

Error 409.

Clinic has future appointments. The clinic has one or more future appointments that need to be cancelled or completed before inactivation.

Figure 193: Error Message for Inactivating a Clinic

2. Once a clinic is selected, the user will select the “Inactivate” button seen in Figure 194.

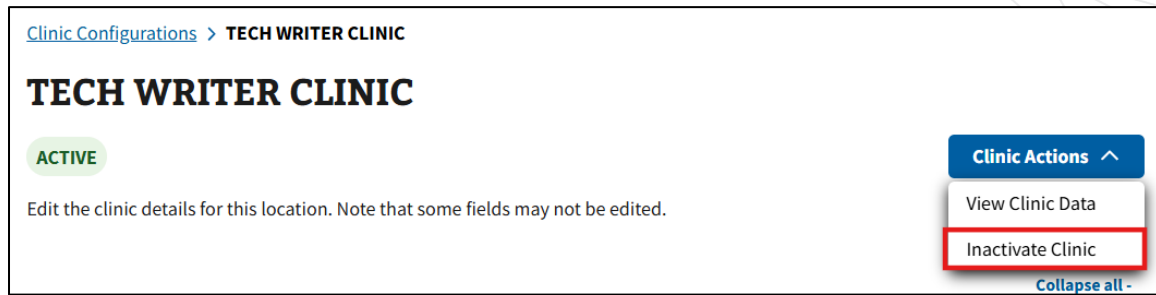


Figure 194: Inactivate Clinic Button for Inactivating a Clinic

3. Selecting the “Inactivate” button will cause a pop-up to appear (see Figure 195) and the user will be asked to select a date of inactivation within a six-month period.

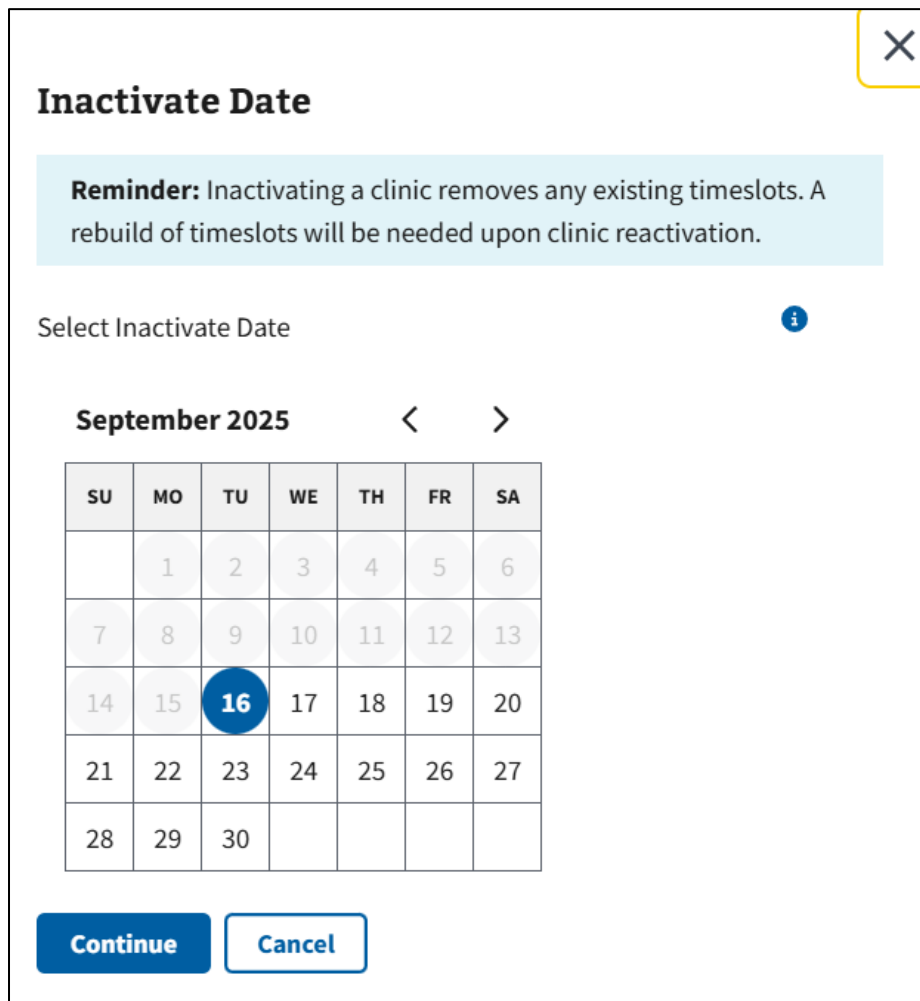


Figure 195: Inactivate Date Pop-up

- ❖ **Note:** Inactivating a clinic will remove all existing timeslots. The user will need to rebuild the timeslots upon reactivation of the clinic.

4. Selecting the “Continue” button (see Figure 195) will place the clinic into an inactive status on the date of selection highlighted in red, as seen in Figure 196.

Clinic Configurations > **TECH WRITER CLINIC**

TECH WRITER CLINIC

INACTIVE (09/16/2025)

Clinic Actions ▾

Edit the clinic details for this location. Note that some fields may not be edited.

[Collapse all -](#)

Figure 196: Inactivate Status Date

- ❖ *Note: A banner of inactivation will display in the Clinic Availability Archive section after the clinic has been inactivated as seen in Figure 197.*

TECH WRITER CLINIC

INACTIVE (09/16/2025)

Clinic Actions ▾

Edit the clinic details for this location. Note that some fields may not be edited.

[Collapse all -](#)

Mandatory Fields	+
Preselected Default Fields	+
Optional Fields	+
Clinic Availability Archive	-

i Clinic was inactivated on **09-16-2025**. Timeslots occurring one year prior to this date have been archived, and may be viewed below.

Figure 197: Clinic is Inactive Message

4.7.2 Reactivating a Clinic

1. To reactivate a clinic, the user will first need to search and select a clinic within the Clinic Configurations tab (see **Figure 198**).

The screenshot shows the VA CCM interface. The top header includes the VA CCM logo and a user profile for '959: 959 Cheyenne VA Medical...'. A left sidebar contains navigation links: Clinic Configurations (selected), Clinic Audit Report, Letters, VA Tool Set, Annual Clinic Profile Review, and Resources. The main content area is titled 'Clinic Configurations' and shows '959 Cheyenne VA Medical Center'. Below the title, it says 'Create or edit the clinic configuration settings for this location.' There is a search bar with 'TECH' entered and a 'Search' button. A 'Create New Clinic' button is also visible. At the bottom, it states 'Valid Search Criteria: At least three characters in the Clinic Name or Abbreviation; or ` and the Clinic IEN (e.g. `3333).'.

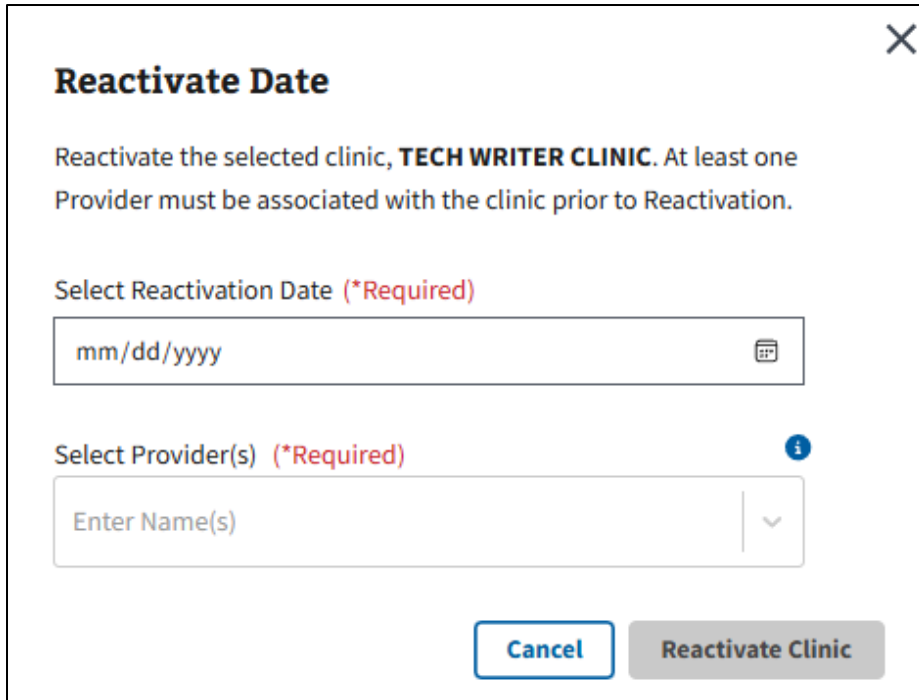
Figure 198: Clinic Search Example for Reactivating a Clinic

- Once a clinic is selected, the user will need to select the “Reactivate Clinic” button located in the “Clinic Actions” dropdown seen in **Figure 199**.

The screenshot shows the VA CCM interface for a specific clinic, 'TECH WRITER CLINIC'. The page title is 'TECH WRITER CLINIC' and it indicates the clinic is 'INACTIVE (09/16/2025)'. Below the title, it says 'Edit the clinic details for this location. Note that some fields may not be edited.' On the right side, there is a 'Clinic Actions' dropdown menu. The dropdown is open, showing two options: 'View Clinic Data' and 'Reactivate Clinic'. The 'Reactivate Clinic' option is highlighted with a red border. At the bottom right, there is a 'Collapse all -' link.

Figure 199: Reactivate Clinic Button

- After selecting the “Reactivate Clinic” button, the pop-up window shown in **Figure 200** will appear. This will allow the user to select a date and provider for the clinic to become reactivated.



Reactivate Date

Reactivate the selected clinic, **TECH WRITER CLINIC**. At least one Provider must be associated with the clinic prior to Reactivation.

Select Reactivation Date (*Required)

mm/dd/yyyy

Select Provider(s) (*Required)

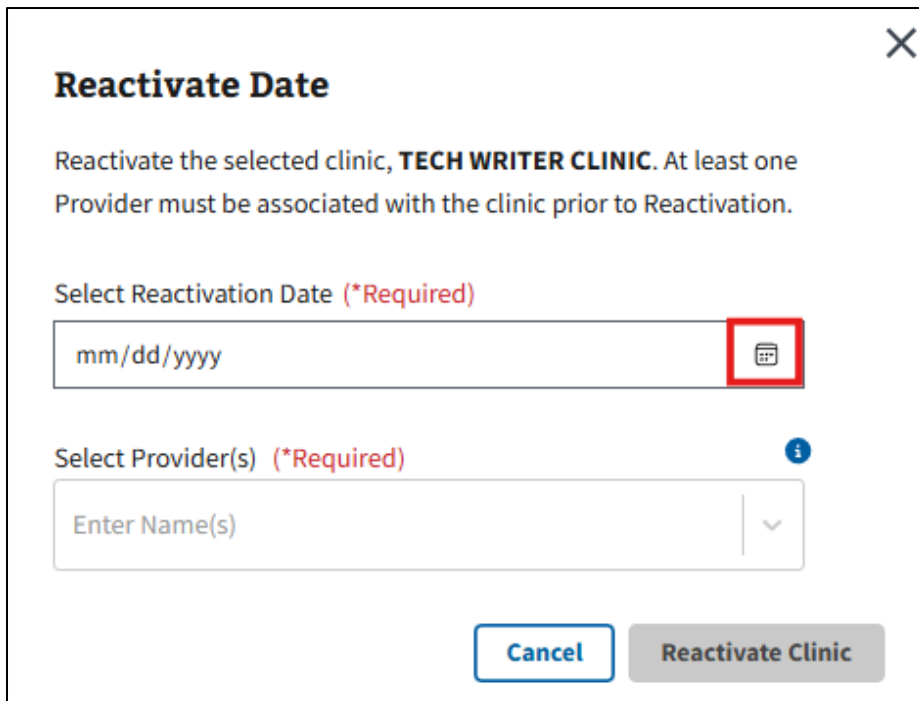
Enter Name(s)

Cancel Reactivate Clinic

This is a screenshot of a 'Reactivate Date' pop-up window. It has a title bar with a close button (X). The main text instructs the user to reactivate 'TECH WRITER CLINIC' and notes that at least one provider must be associated. There are two required fields: 'Select Reactivation Date' and 'Select Provider(s)'. The date field shows 'mm/dd/yyyy' and has a calendar icon on the right. The provider field shows 'Enter Name(s)' and has a dropdown arrow. At the bottom are 'Cancel' and 'Reactivate Clinic' buttons.

Figure 200: Reactivate Clinic Pop-up

- The user will then need to select a date by clicking the calendar button shown below in Figure 201.



Reactivate Date

Reactivate the selected clinic, **TECH WRITER CLINIC**. At least one Provider must be associated with the clinic prior to Reactivation.

Select Reactivation Date (*Required)

mm/dd/yyyy

Select Provider(s) (*Required)

Enter Name(s)

Cancel Reactivate Clinic

This is a screenshot of the same 'Reactivate Date' pop-up window as in Figure 200. In this version, a red rectangle highlights the calendar icon in the date field, indicating where the user should click to select a date.

Figure 201: Calendar Button for Reactivating a Clinic

- The user will also need to enter a provider into the field seen in Figure 202.

Reactivate Date

Reactivate the selected clinic, **TECH WRITER CLINIC**. At least one Provider must be associated with the clinic prior to Reactivation.

Select Reactivation Date (*Required)

11/05/2025

Select Provider(s) (*Required)

Enter Name(s)

Cancel Reactivate Clinic

Figure 202: Provider Field for Reactivating a Clinic

- After entering the required information, the user will need to select the checkbox seen in Figure 203 to confirm.

Reactivate Date

Reactivate the selected clinic, **TECH WRITER CLINIC**. At least one Provider must be associated with the clinic prior to Reactivation.

Select Reactivation Date (*Required)

11/05/2025

Select Provider(s) (*Required)

TEST GENERIC,TEST - OI&T STAFF

☐ I confirm that the above providers are correct.

Cancel Reactivate Clinic

Figure 203: Confirmation Checkbox for Reactivating a Clinic

- ❖ *Note: The “Reactivate Clinic” button will remain greyed out until a date and provider are chosen; once chosen, the button will become available for selection as seen in Figure 204.*

7. Once the information is confirmed, the user can select the “Reactivate Clinic” button seen in Figure 204.

Reactivate Date

Reactivate the selected clinic, **TECH WRITER CLINIC**. At least one Provider must be associated with the clinic prior to Reactivation.

Select Reactivation Date (*Required)

11/05/2025

Select Provider(s) (*Required)

TEST GENERIC, TEST - OI&T STAFF

☒ I confirm that the above providers are correct.

Cancel Reactivate Clinic

Figure 204: Reactivate Clinic Button

- ❖ *Note: The user is unable to reactivate a clinic on the same day of inactivation; only future dates are available for selection.*

4.8 Replicating a Clinic

Disclaimer: This section of the guide is only applicable to users with the correct write access permissions. If the user does not have write access permissions set to the account, the user will receive the error message shown in Figure 205. If a user needs access to make changes on this application, please contact the local Clinical Applications Coordinator or Supervisor for assistance.

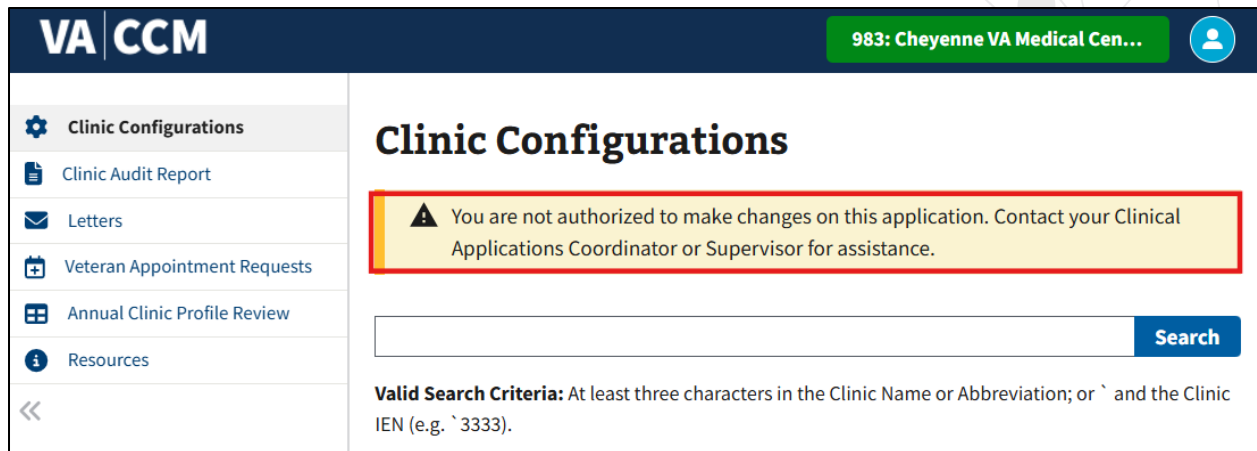


Figure 205: Authorization Error Message for Replicating a Clinic

1. The user will need to follow the steps outlined in section **3.1 Search for a Clinic Configuration** (see **Figure 39** for guidance) to open the clinic configurations for a clinic. On the Clinic Configurations page, the user will need to select the "Clinic Actions" button seen in Figure 206.

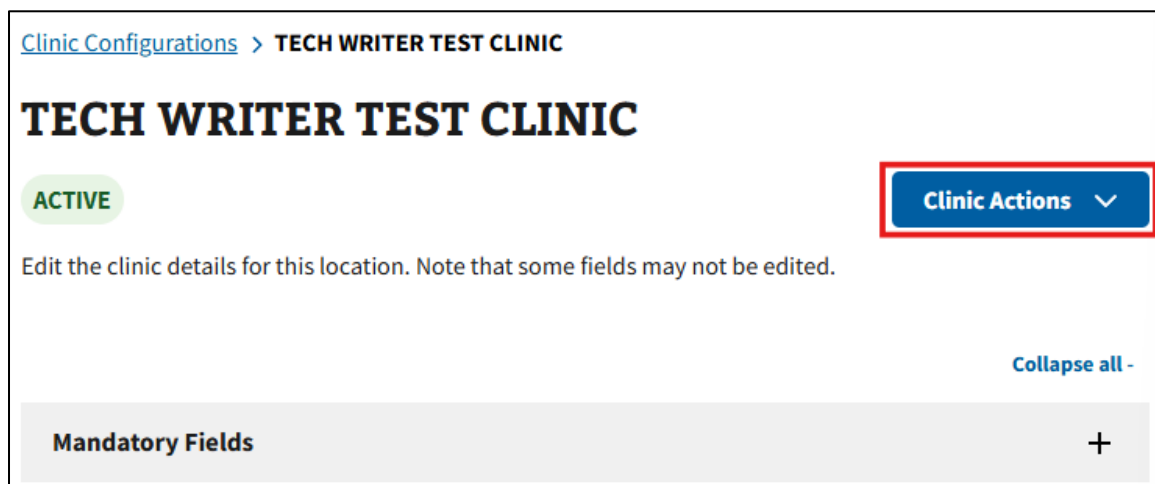


Figure 206: Clinic Actions Button for Replicating a Clinic

2. This will cause the action menu to appear, and the user can then select the "Replicate Clinic" option shown in Figure 207.

TECH WRITER TEST CLINIC

ACTIVE

Edit the clinic details for this location. Note that some fields may not be edited.

Clinic Actions ^

- View Clinic Data
- Inactivate Clinic
- Replicate Clinic**

Figure 207: Replicate Clinic Option from the Clinic Action Menu

- The user will be taken to the Replicate Clinic page where the three configuration accordions: Mandatory Fields, Preselected Settings, and Optional Settings, will be auto-populated with information from the selected clinic (see Figure 208 for example).

Review Mandatory, Preselected and Default fields

Create a replicate of TECH WRITER TEST CLINIC. Review all fields for accuracy. A new clinic name and patient friendly name must be entered.

[Expand all +](#)

Mandatory Fields

Clinic Name (*Required) ⓘ 	Patient Friendly Name (*Required) ⓘ 	Stop Code (Primary) (*Required) ⓘ 131 - URGE...
Select Provider(s) (*Required) ⓘ DEW...	Medical Center Division (*Required) ⓘ FT STEVEN...	Length of Appointment (*Required) ⓘ 30
Physical Location (*Required) ⓘ 111 MAIN ST	Telephone (*Required) ⓘ 111 111 1111	Telephone Extension (*Required) ⓘ 112

Figure 208: Example of Auto-populated Fields for Replicating a Clinic

4. The clinic configurations for the replicated clinic can be edited, if needed, by selecting the “+” shown in Figure 209. The user will only be required to enter information for the “Clinic Name” and “Patient Friendly Name” fields, located under the Mandatory Fields accordion, if edits are not necessary.

Clinic Configurations > TECH WRITER TEST CLINIC > Replicate Clinic

Replicate Clinic

Review Mandatory, Preselected and Default fields

Create a replicate of TECH WRITER TEST CLINIC. Review all fields for accuracy. A new clinic name and patient friendly name must be entered.

[Expand all +](#)

Mandatory Fields	+
Preselected Default Fields	+
Optional Fields	+

[Cancel](#) [Replicate Clinic](#)

Figure 209: Replicate Clinic Accordions

- ❖ **Note:** Please see sections **4.6.1 Mandatory Fields**, **4.6.2 Preselected Settings**, and **4.6.3 Optional Settings** for examples of the accordions.
- ❖ **Note:** Editing the “Length of Appointment,” “Display Increments Per Hour,” or the “Hour Clinic Display Begins” fields located in the Mandatory and Preselected Default Fields accordion will remove the timeslots for the new replicated clinic. Users will see the notification seen in Figure 210 at the bottom of the Replicate Clinic page upon change.

Length of Appointment, Display Increments Per Hour, and/or Clinic Hour Display Begins has changed from it's original selection. Clinic Availability will not be replicated.

Figure 210: Clinic Availability Not Replicated Notification

4. Once the required fields have been correctly filled, the “Replicate Clinic” button seen in Figure 211 will appear. If not entered correctly, the button will remain greyed out.

Replicate Clinic

Review Mandatory, Preselected and Default fields

Create a replicate of TECH WRITER TEST CLINIC. Review all fields for accuracy. A new clinic name and patient friendly name must be entered.

[Expand all +](#)

Mandatory Fields	+
Preselected Default Fields	+
Optional Fields	+

[Cancel](#) [Replicate Clinic](#)

Figure 211: Replicate Clinic Button after Entering Required Information

- ❖ *Note: Users will see the window shown below in **Figure 212**, when selecting the “Replicate Clinic” button, if changes to the “Length of Appointment,” “Display Increments Per Hour,” or “Hour Clinic Display Begins” fields have been made. The user can either continue with replicating the clinic without timeslots included or close the window to edit the mentioned fields.*

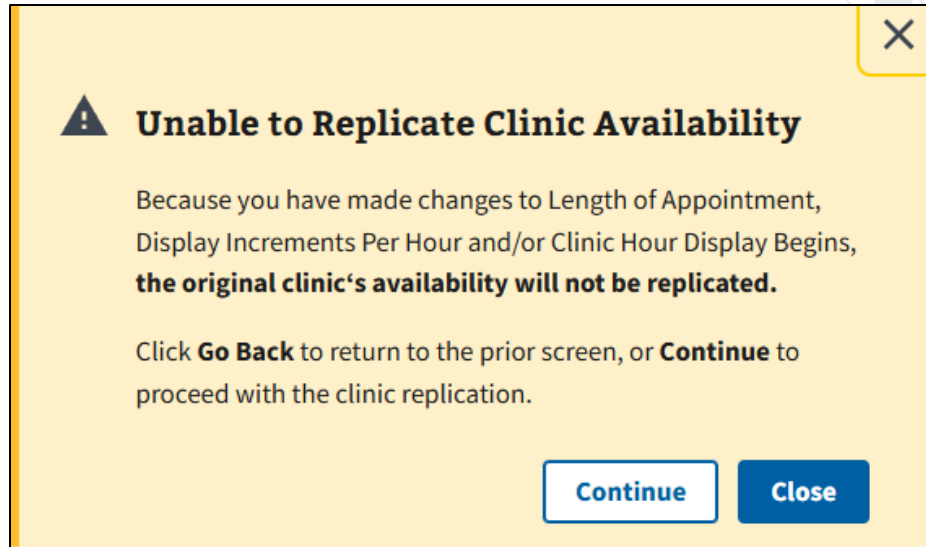


Figure 212: Unable to Replicate Clinic Availability Window

5. After selecting "Replicate Clinic," the user will see the pop-up seen in Figure 213, where they can choose to either keep the original clinic or select a date of inactivation. The user will then need to select the "Continue" button to save changes.

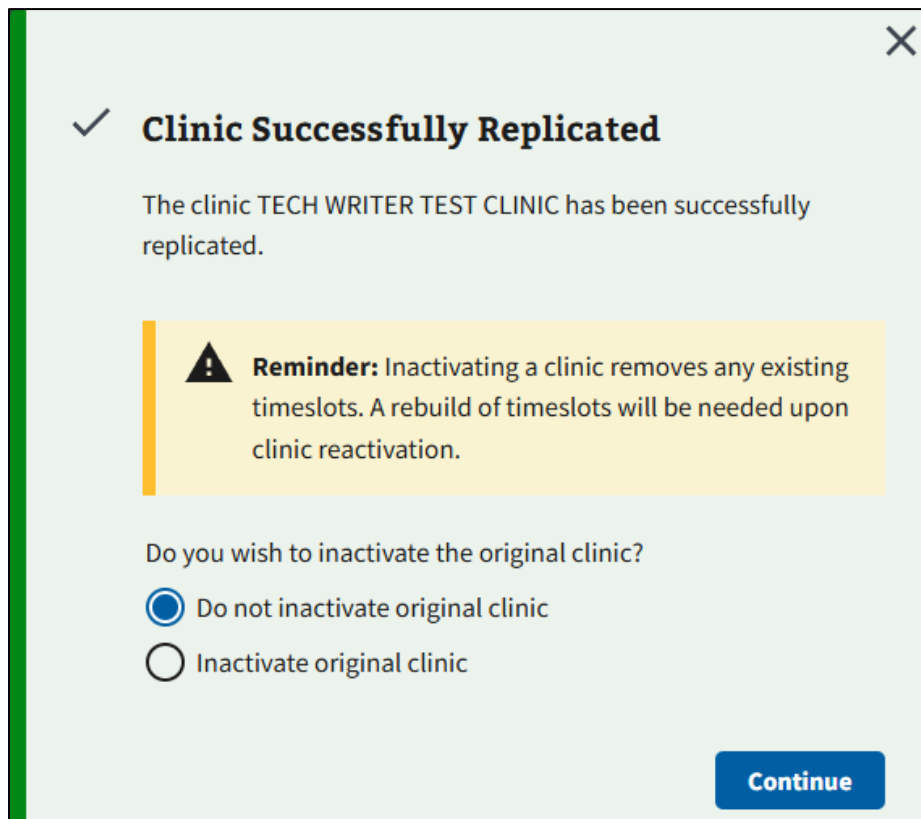


Figure 213: Clinic Successfully Replicated Window

- ❖ *Note: The user must create a clinic before timeslots can be added or modified; this function cannot be done in the process of creation. After creating a replicate clinic, the UI will immediately take the user to the Edit Clinic Availability section to add or modify timeslots associated to the clinic. Please refer to the section **Editing Clinic Configurations** for guidance.*

5. Clinic Audit Report

To access the Clinic Audit Report, the user will need to select the “Clinic Audit Report” tab seen in **Figure 214**.

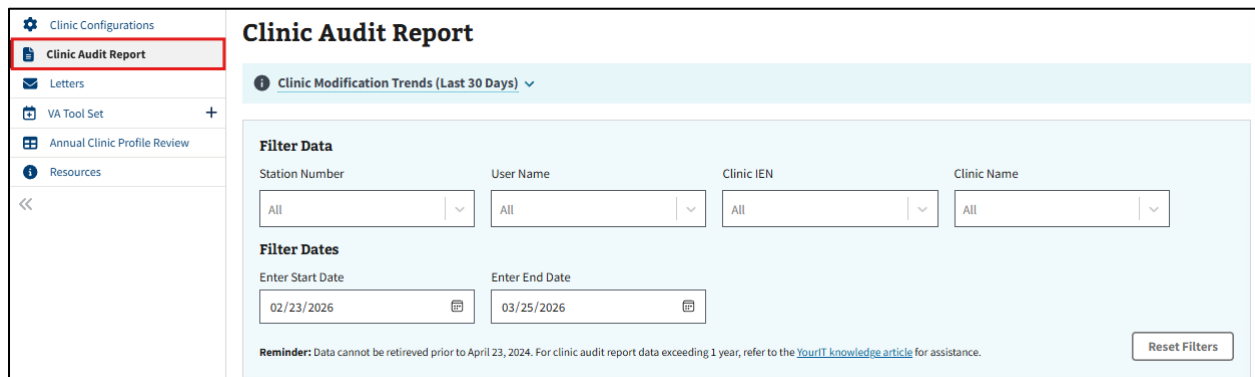


Figure 214: Clinic Audit Report Tab

- ❖ *Note: Users will see the error in **Figure 1** if they do not have access to the page. Please see **1.2 Prerequisite Credentials** for more information.*

5.1 Familiarizing Yourself with the Clinic Audit Report

Once log in is complete, users will see the CCM Clinic Audit Report page as seen in Figure 215. The user will be able to access reports for both “Edit Clinic” and “Add Clinic” on this webpage. By default, all clinic profile information is shown within these grids until further filtered.

Clinic Audit Report

Clinic Modification Trends (Last 30 Days) ▾

Filter Data

Station Number: User Name: Clinic IEN: Clinic Name:

Filter Dates

Enter Start Date: Enter End Date:

Reminder: Data cannot be retrieved prior to April 23, 2024. For clinic audit report data exceeding 1 year, refer to the [YourIT knowledge article](#) for assistance.

[Reset Filters](#)

Edit Clinic [Add Clinic](#) [Export](#)

Station	CLINIC IEN	User Name	Event Timestamp EST Time Zone	Clinic Name	Abbreviations	Patient Friendly Name
442GC	10968	TESTGENERIC, TEST	2/24/2026, 08:05:58	02/24/2026EDIT (previously: 02/24/2026)	TESTEDT (previously: TEST)	TEST EDITED (previously: TEST)
442	6284	TESTGENERIC, TEST	2/24/2026, 08:06:43	00 0037 TEST CLINIC		
442	6284	TESTGENERIC, TEST	2/24/2026, 08:07:07	00 0037 TEST CLINIC		
442	6284	TESTGENERIC, TEST	2/24/2026, 08:07:24	00 0037 TEST CLINIC		
442HK	8352	TESTGENERIC, TEST	2/24/2026, 08:08:00	REACTIVATE FOR SMOKE TEST		

Rows per page: 5 [1](#) [2](#) [3](#) [4](#) [5](#) ... 492

Figure 215: CCM Clinic Audit Report Homepage

- ❖ **Note:** When viewing entries in the Edit Clinic tab, data will only be shown to the user if the value has been changed. The report will have a blank value if there have been no changes to a clinic attribution or will show an "@" symbol if there was once data that has since been removed.
- ❖ **Note:** Users can expand the dropdown labeled "Clinic Modification Trends (Last 30 Days)," seen in Figure 216 to see an overview of Clinic Modification Trends over the past 30 days.

Clinic Audit Report

Clinic Modification Trends (Last 30 Days) ▴

- 23 CCM Users
- 71 Clinic Name Modifications
- 93 Direct Patient Scheduling Modifications
- 2459 Clinic Modifications
- 323 Most Selected Stop Code
- 340 Created Clinics

Figure 216: Clinic Modification Trends

5.2 Filtering Reports and Exporting Data

5.2.1 Filtering Results

Users have the ability to filter data for both the Edit Clinic and Add Clinic reports simultaneously by adjusting the filter options shown in **Figure 217**.

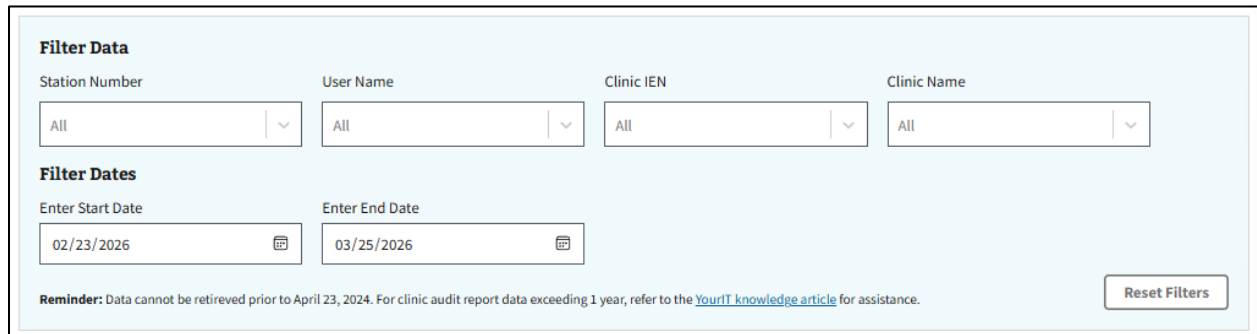


Figure 217: Filter Options

Only one option can be chosen within each of the filter selections at a time. Search results will continue to narrow down further as more of the filters are added. Once any filter is selected, the “Reset Filters” button will become selectable to give users the option to reset any filters that have been applied, as seen in Figure 218. See the **Table 1** below for a brief description on what each filter does.

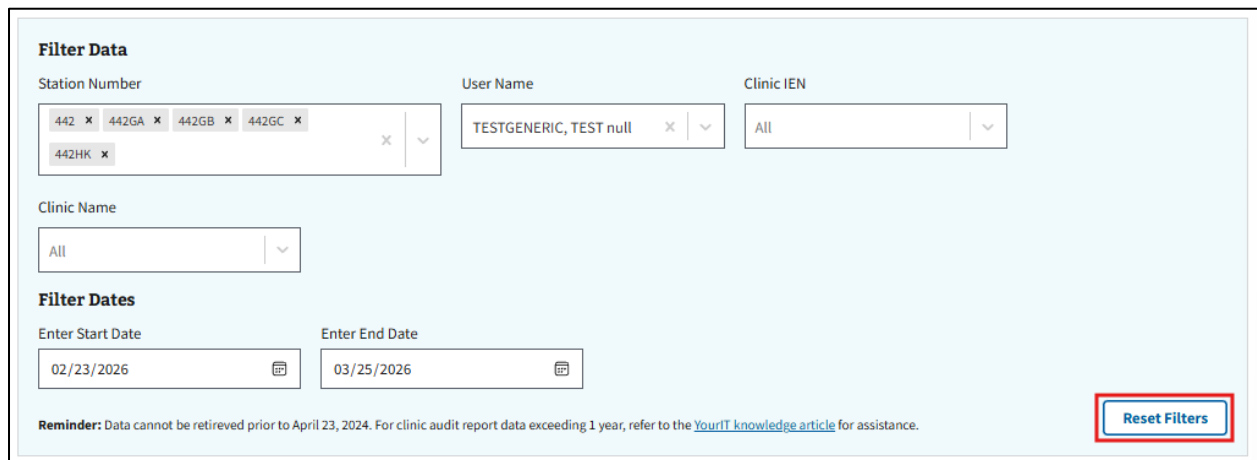


Figure 218: Reset Filters Button

Table 1: Filter Descriptions for Clinic Audit Report

Filter Name	Filter Descriptions
Station Number	Parent and child site numbers
Username	Name of the individual that made the edit or add

Clinic IEN	Clinic Internal Entry Number (referred to as the unique identifier for the clinic)
Clinic Name	Name of the clinic
Filter Dates	Ability to change the report start and end time

5.2.2 Filtering with Dropdowns

1. To filter by dropdown, select any of the dropdown arrows located as seen in Figure 219.

Figure 219: Example of Choosing Filter Selection

2. The user will then select the preferred option from the available selection, shown in Figure 220.

Figure 220: Example of Filter Selection Dropdown

3. Once selected, search results within both Edit Clinic and Add Clinic tabs will automatically update. Users can choose to further narrow the report by selecting more filters.

5.2.3 Filtering by Date Range

1. To filter by date range, the user will need to select the calendar button, shown below in Figure 221, to choose a start date.

Filter Data

Station Number: All | User Name: All | Clinic IEN: All | Clinic Name: All

Filter Dates

Enter Start Date: mm/dd/yyyy  | Enter End Date: mm/dd/yyyy 

Reminder: Data cannot be retrieved prior to April 23, 2024. For clinic audit report data exceeding 1 year, refer to the [YourIT knowledge article](#) for assistance.

[Reset Filters](#)

Figure 221: Calendar Button for Enter Start Date

- Users will then need to select the calendar button, shown below in Figure 222, to choose an end date.

Filter Data

Station Number: All | User Name: All | Clinic IEN: All | Clinic Name: All

Filter Dates

Enter Start Date: 03/26/2026  | Enter End Date: mm/dd/yyyy 

Reminder: Data cannot be retrieved prior to April 23, 2024. For clinic audit report data exceeding 1 year, refer to the [YourIT knowledge article](#) for assistance.

[Reset Filters](#)

Figure 222: Calendar Button for Enter End Date

- Once selected, search results within both the Edit Clinic and Add Clinic tabs will automatically update. Users can choose to further narrow the report by selecting more filters.

5.3 Exporting Data

Users also have the ability to export data from either the Edit Clinic or Add Clinic tables into an excel document. To do so, select the “Export” button, shown in Figure 223, found above the table the user wishes to export. Once selected, the user will then need to follow the on-screen browser instructions to save and download the file to the computer.

Edit Clinic **Add Clinic** [Export](#)

Station	CLINIC IEN	User Name	Event Timestamp EST Time Zone	Clinic Name	Abbreviations	Patient Friendly Name
442GA	7310	TESTGENERIC, TEST	3/10/2026, 10:15:44	MANDATORY FOR AUTOMATION		
442GA	7310	TESTGENERIC, TEST	3/10/2026, 10:17:13	MANDATORY FOR AUTOMATION		

Figure 223: Export Button for Clinic Audit Report

6. Letters

*Disclaimer: This section of the guide is only applicable to users with access permissions SDEDLET. If the user does not have elevated access permissions set to their VistA account, the user will only be able to search for existing letters as seen below in **Figure 224**. If a user needs access to make changes on this application, please contact the local Clinical Applications Coordinator or Supervisor for assistance.*

Letters

983: Cheyenne VA Medical Center

Create a new letter, or edit existing letters for this location.

Letter Type (*Required) ? Search by Letter Name ?

NO-SHOW ▼ Search

Name ?

CHEYENNE FAILED TO REPORT
DISCHARGE FROM CLINIC
FORT COLLINS FAILED TO REPORT
GREELEY FAILED TO REPORT

Figure 224: View Existing Letters

6.1 Create a Letter

1. To create a new letter, the user will need to select the “Letters” tab shown below in Figure 225 to be brought to the Letters page.

Letters

958: 958 Cheyenne VA Medical Center

Create a new letter, or edit existing letters for this location.

Letter Type (*Required) ? Search by Letter Name

Select... ▼ Search Create Letter

Figure 225: Letters Tab

2. The user will then need to select the “Create Letter” button seen in Figure 226.

Letters

958: 958 Cheyenne VA Medical Center

Create a new letter, or edit existing letters for this location.

Letter Type (*Required) i Search by Letter Name

Select... Search + Create Letter

Figure 226: Create Letter Button on the Letters Page

- The Create New Letter page will then appear. Fill in all the required fields and select optional toggle boxes, as needed (See **Figure 227** for example).

Create a new letter for this location.

Letter Type (*Required) i Letter Name (*Required) i

APPOINTMENT CANCELLED TW APPOINTMENT CANCELLATION LETTER

Greeting (*Required) i

HELLO

Message (*Required) i

YOUR APPOINTMENT HAS BEEN CANCELLED

☐ Print Default Provider ☐ Print Clinic Location

Cancel Create Letter

Figure 227: Example of Letter

- Once all the required fields have been filled out, the user will need to select the “Create Letter” button, shown in Figure 228, to create the letter.

Message (*Required)

YOUR APPOINTMENT HAS BEEN CANCELLED

☐ Print Default Provider ☐ Print Clinic Location

Cancel Create Letter

Figure 228: Create Letter Button on the Create New Letter Page

6.2 View a Letter

1. To view a letter, the user will need to search for an existing letter by selecting the letter type of the original letter. Optionally, the user can use the “Search by Letter Name” function (case sensitive) to further narrow the results. After inputting the necessary information, the user will need to select the “Search” button, shown below in **Figure 229**.

Letters

958: 958 Cheyenne VA Medical Center

Create a new letter, or edit existing letters for this location.

Letter Type (*Required) Search by Letter Name

APPOINTMENT CANCELLED TW APPT CANCELLED

Search Create Letter

Figure 229: Search Button for Viewing Letters

2. All existing letters that match the search criteria will appear. The user will need to select the ellipsis next to the desired letter and then select the “View Letter” option seen in **Figure 230**.

Actions	Name ↑↓	Type
...	TW APPT CANCELLED	APPOINTMENT CANCELLED
View Letter Edit Letter Delete Letter		

Rows per page 10 < 1 >

Figure 230: View Letter Button from Action Menu

3. The View Letter page will appear with a preview of the chosen letter (see **Figure 231** for example). From here, the user can choose to select the “Edit Letter” button, if needed, to be directed to the Edit Letter page. If no edits need to be made, the user can select the “Close” button to continue viewing other letter options.

The screenshot shows a web application window titled "View Letter" with a close button (X) in the top right corner. Below the title, the letter details are displayed: "Name: TW APPT CANCELLED" and "Type: APPOINTMENT CANCELLED". The main area contains a preview of a letter, which is a text-based template. The letter starts with "Top of page 1" and "PRINT DATE" in the top right. The patient information is listed as "PATIENT NAME", "ADDRESS LINE 1", "ADDRESS LINE 2", and "CITY ST ZIP". The salutation is "Dear [Patient Name],". The body of the letter begins with "HELLO", followed by the appointment details: "Date/Time: [DAY OF WEEK MONTH DAY, YEAR TIMEZONE]", "Clinic: [CLINIC NAME]", and "Telephone: [PHONE NUMBER] Telephone Ext.: [PHONE EXTENSION]". The main message is "YOUR APPOINTMENT HAS BEEN CANCELLED.", and it ends with "THANK YOU.". At the bottom left, there is a "Font Size" section with a dropdown menu currently set to "12". At the bottom right, there are two buttons: "Close" and "Edit Letter".

View Letter

Name: **TW APPT CANCELLED** Type: **APPOINTMENT CANCELLED**

Top of page 1 PRINT DATE

PATIENT NAME
ADDRESS LINE 1
ADDRESS LINE 2
CITY ST ZIP

Dear [Patient Name],

HELLO

Date/Time: [DAY OF WEEK MONTH DAY, YEAR TIMEZONE]
Clinic: [CLINIC NAME]
Telephone: [PHONE NUMBER] Telephone Ext.: [PHONE EXTENSION]

YOUR APPOINTMENT HAS BEEN CANCELLED.

THANK YOU.

Font Size
12

Close **Edit Letter**

Figure 231: View Letter Page Example

6.3 Edit a Letter

1. To edit a letter, the user will need to search for an existing letter by selecting the letter type of the original letter that needs modification. Optionally, the user can use the “Search by Letter Name” function (case sensitive) to further narrow the results. After inputting the necessary information, the user will need to select the “Search” button, shown below in **Figure 232**.

Letters

958: 958 Cheyenne VA Medical Center

Create a new letter, or edit existing letters for this location.

Letter Type (*Required) ⓘ Search by Letter Name ⓘ

APPOINTMENT CANCELLED ▼ TW APPT CANCELLED **Search** Create Letter

Figure 232: Search Button for Editing Letters

2. All existing letters that match the search criteria will appear. The user will need to select the ellipsis next to the letter that needs to be edited and then select the “Edit Letter” option seen in **Figure 233**.

Actions	Name ↑↓	Type
...	TW APPT CANCELLED	APPOINTMENT CANCELLED

View Letter
Edit Letter
Delete Letter

Rows per page 10 < 1 >

Figure 233: Edit Letter Button from the Action Menu

3. The Edit Letter page will appear (see **Figure 234** for example) where users will need to make minimum of one edit to continue.

Edit Letter

958 958 Cheyenne VA Medical Center

Edit the selected letter for this location.

Letter Type

Letter Name **(*Required)** ⓘ

APPOINTMENT CANCELLED

TW APPT CANCELLED

Greeting **(*Required)** ⓘ

HELLO

Message **(*Required)** ⓘ

YOUR APPOINTMENT HAS BEEN CANCELLED.
THANK YOU.

☐ Print Default Provider ☒ Print Clinic Location

Figure 234: Edit Letter Page

- Once all edits have been made, the user will select the “Save Changes” button shown in **Figure 235** to save all changes.

Message **(*Required)** ⓘ

YOUR APPOINTMENT HAS BEEN CANCELLED.
THANK YOU.

☐ Print Default Provider ☒ Print Clinic Location

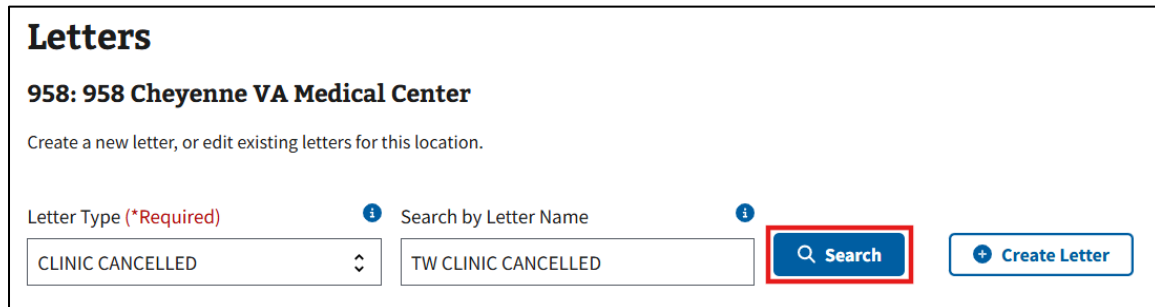
Cancel

Save Changes

Figure 235: Save Changes Button for Edit Letter Page

6.4 Delete a Letter

1. To delete a letter, the user will need to search for an existing letter by selecting the letter type of the original letter that needs to be deleted. Optionally, the user can use the “Search by Letter Name” function (case sensitive) to further narrow the results. After inputting the necessary information, the user will need to select the “Search” button, shown below in **Figure 236**.



Letters

958: 958 Cheyenne VA Medical Center

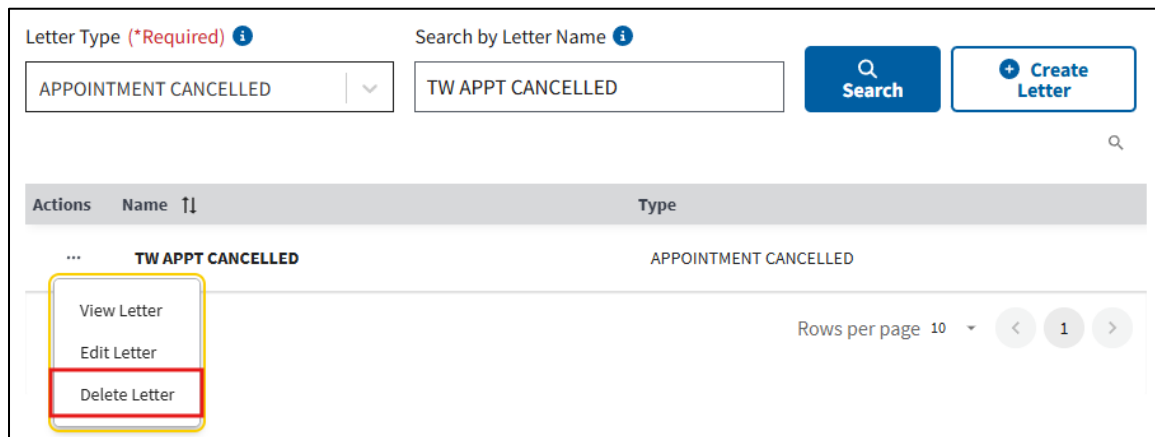
Create a new letter, or edit existing letters for this location.

Letter Type (*Required) i Search by Letter Name i

CLINIC CANCELLED TW CLINIC CANCELLED Search + Create Letter

Figure 236: Search Button for Deleting Letters

2. All existing letters that match the search criteria will appear. The user will need to select the ellipsis next to the letter that needs to be deleted and then select the “Delete Letter” option, shown in **Figure 237**.



Letter Type (*Required) i Search by Letter Name i

APPOINTMENT CANCELLED TW APPT CANCELLED Search + Create Letter

Actions	Name ↑↓	Type
...	TW APPT CANCELLED	APPOINTMENT CANCELLED

View Letter
Edit Letter
Delete Letter

Rows per page 10 < 1 >

Figure 237: Delete Letter Button from the Action Menu

3. The Delete Letter window will appear. The user will need to select the “Delete Letter” button, shown below in **Figure 238**, to delete the letter.

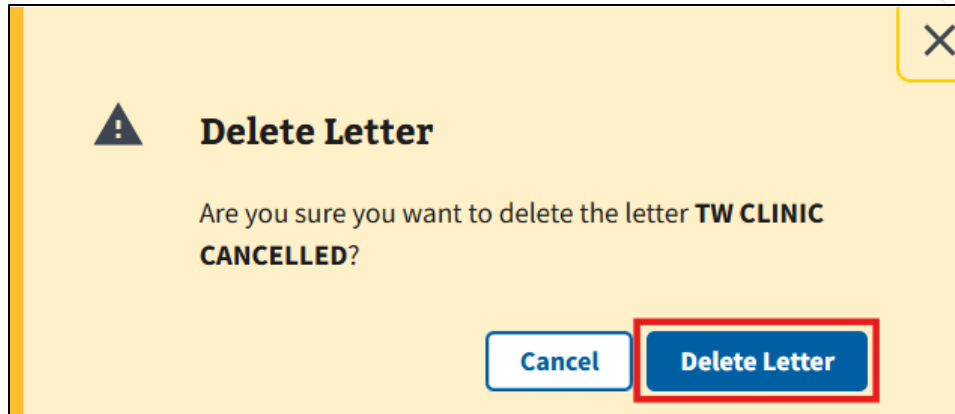


Figure 238: Delete Letter Button

7. VA Tool Set

To access the pages within VA Tool Set, select the "+" shown below in **Figure 239**. Afterwards, the accordion view shown in **Figure 240** will appear.

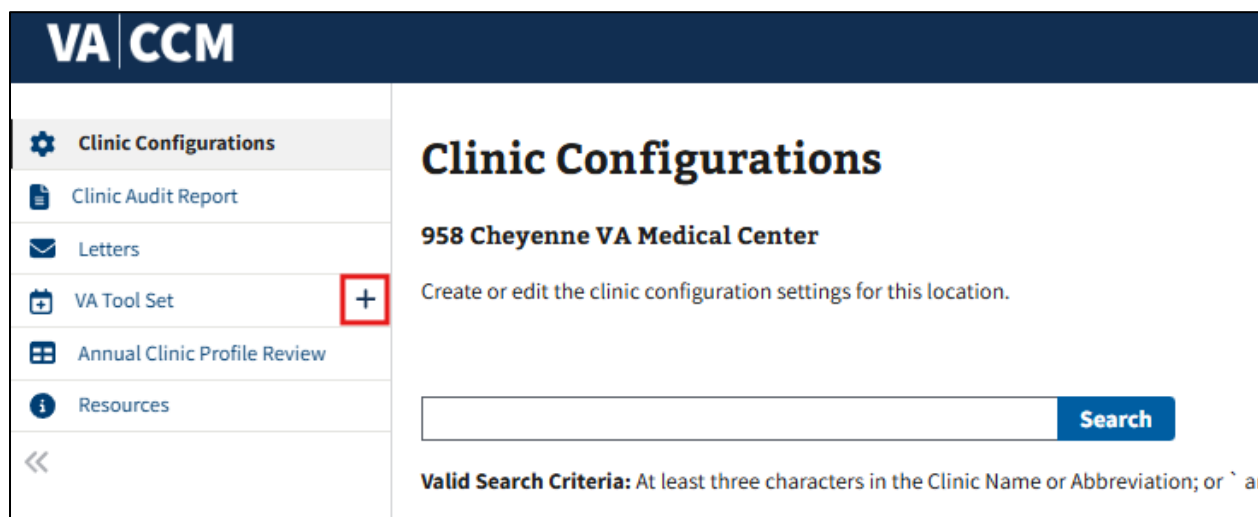


Figure 239: VA Tool Set Tab

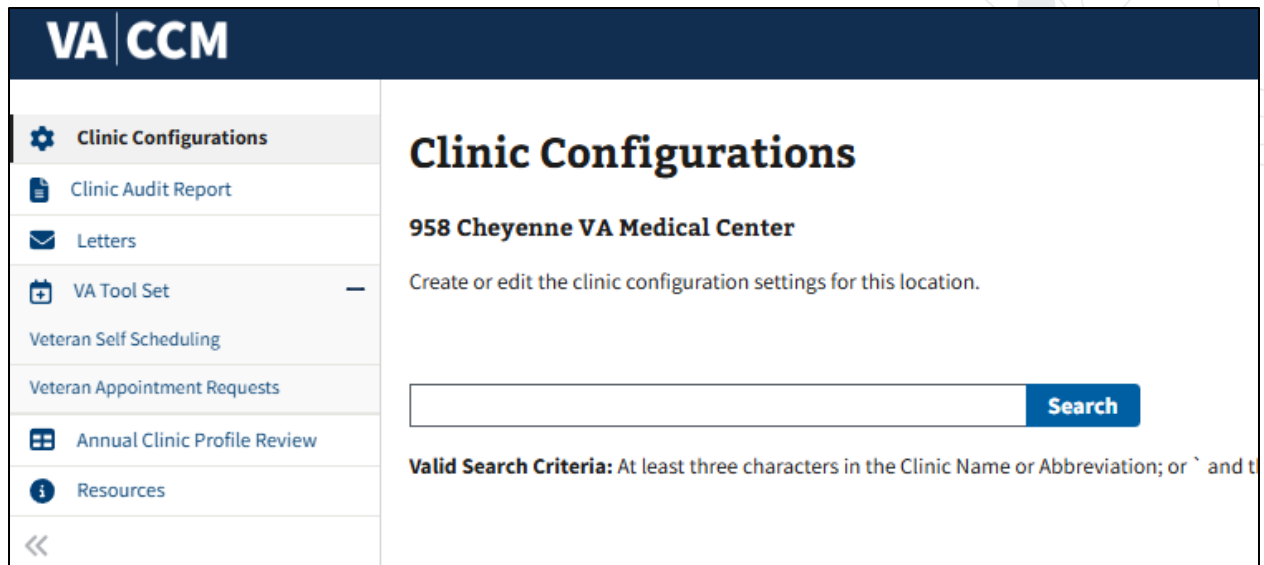


Figure 240: VA Tool Set Accordion View

7.1 Veteran Self Scheduling

Within the Veteran Self Scheduling tab, users can search and view Veteran Self Scheduling for a specific clinic. In addition to these capabilities, users with the correct edit permissions are able to edit in Veteran Self Scheduling. Please note that services vary depending on location.

7.1.1 View Veteran Self Scheduling

1. Select the tab labeled “Veteran Self Scheduling” shown below in **Figure 241** to be directed to the Veteran Self Scheduling page.

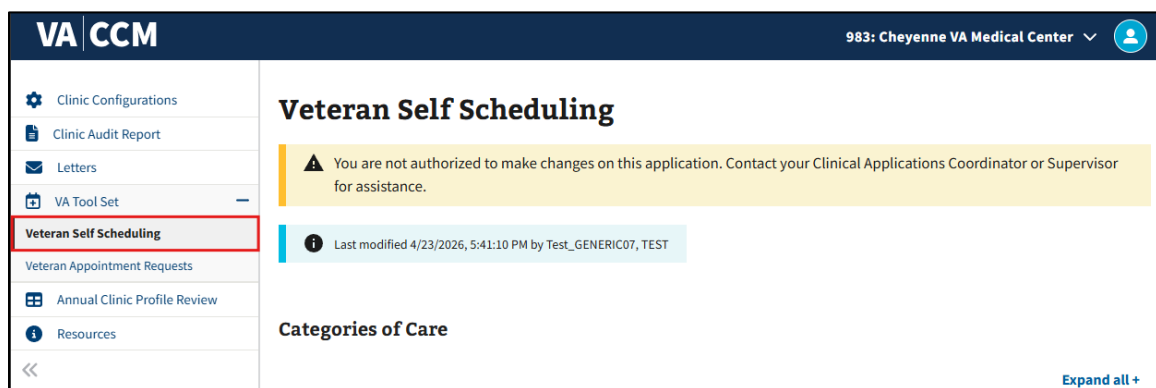


Figure 241: Viewing Veteran Self Scheduling

2. Select the “+” shown in **Figure 242** to expand the pinned services accordion. Afterwards, the accordion view shown in **Figure 243** will appear.

Categories of Care

Expand all +

Outpatient Mental Health - (502)	+
Primary Care - (322, 323, 350)	+
Amputation Services - (211)	+

Figure 242: Pinned Services Button for Viewing VA Self Scheduling

Categories of Care

Expand all +

Outpatient Mental Health - (502)	-
Support Type ☒ Any Veteran ☐ Veterans seen within this care type based upon time frame	
Primary Care - (322, 323, 350)	+

Figure 243: Expanded Accordions of Viewing VA Self Scheduling Settings

7.1.2 Edit Veteran Self Scheduling

*Disclaimer: This section of the guide is only applicable to users with the correct write access permissions. If the user does not have write access permissions set to the account, the user will receive the error message shown in **Figure 244**. If a user needs access to make changes on this application, please contact the local Clinical Applications Coordinator or Supervisor for assistance.*

VA CCM 983: Cheyenne VA Medical Center

Veteran Self Scheduling

⚠️ You are not authorized to make changes on this application. Contact your Clinical Applications Coordinator or Supervisor for assistance.

i Last modified 4/23/2026, 5:41:10 PM by Test_GENERIC07, TEST

Categories of Care

Expand all +

Figure 244: Authorization Error Message for VA Self Scheduling Settings

1. Select the tab labeled “Veteran Self Scheduling” shown below in **Figure 245** to be directed to the Veteran Self Scheduling page.

VA CCM 959: 959 Cheyenne VA Medical Center

- Clinic Configurations
- Clinic Audit Report
- Letters
- VA Tool Set
- Veteran Self Scheduling**
- Veteran Appointment Requests
- Annual Clinic Profile Review
- Resources

Veteran Self Scheduling

959 Cheyenne VA Medical Center

For the care types listed below, provide the Veteran Self Scheduling Settings supported by the location.

Last modified 4/23/2026, 5:41:10 PM by Test_GENERIC07, TEST

Categories of Care

Expand all +

Figure 245: Editing Veteran Self Scheduling

2. Select the “+” shown in **Figure 246** to expand the pinned services accordion. Afterwards, the accordion shown in **Figure 247** will appear where the user will be able to edit selections.

Categories of Care

Expand all +

Outpatient Mental Health - (502)	+
Primary Care - (322, 323, 350)	+
Amputation Services - (211)	+

Figure 246: Pinned Services Button for Editing VA Self Scheduling

Categories of Care

Expand all +

Outpatient Mental Health - (502) —

Support Type

☐ Any Veteran

☒ Veterans seen within this care type based upon time frame

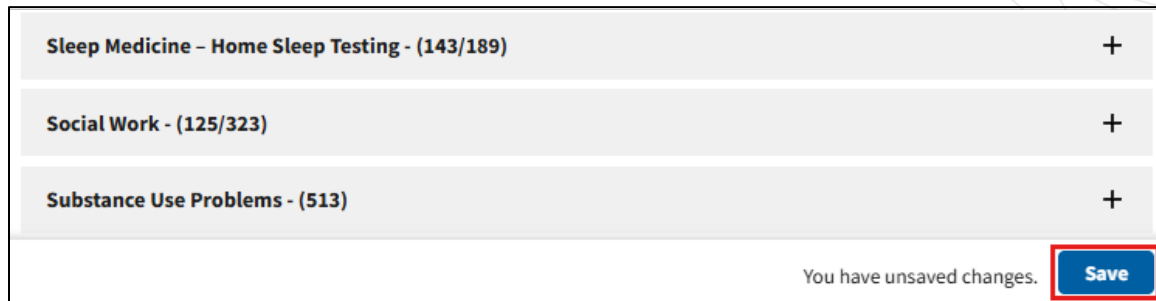
Last seen for this care type within... (*Required)

☒ 36 Months

☐ 12 Months

Figure 247: Accordion View of Editing VA Self Scheduling Settings

3. After making necessary changes, select the save button shown in **Figure 248**.



The screenshot shows a list of services with expand/collapse icons (+) on the right:

- Sleep Medicine - Home Sleep Testing - (143/189)
- Social Work - (125/323)
- Substance Use Problems - (513)

At the bottom right, there is a status message "You have unsaved changes." and a blue "Save" button, which is highlighted with a red rectangle.

Figure 248: Save Button for VA Self Scheduling Settings

- ❖ *Note: The "Save" button only becomes available in the bottom right-hand corner on the VA Self Scheduling page when a minimum of one change has been made; if no change is made, the "Save" button as seen in **Figure 248** will not appear.*
- ❖ *Note: Some but not all fields have a mandatory (*Required) field which needs to be populated before saving. If a user tries to save without selecting a mandatory (*Required) field, they will receive the error message shown in **Figure 249**.*

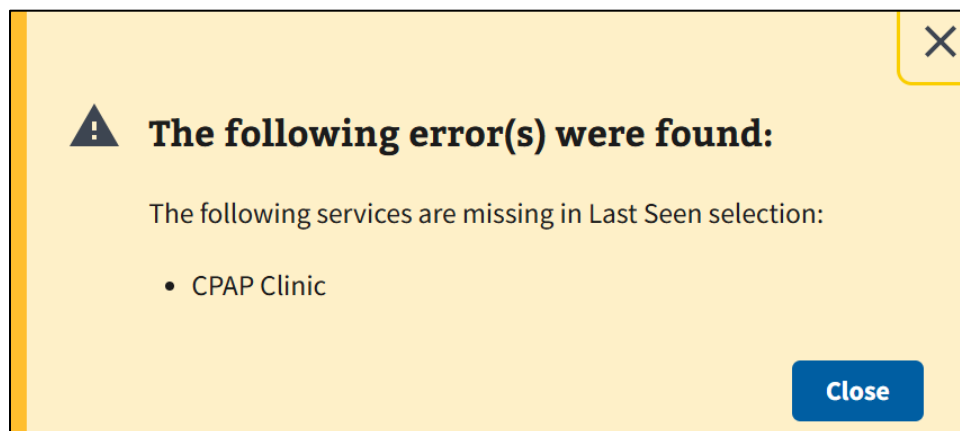


Figure 249: Error Field for Saving in VA Self Scheduling

4. Once the save is complete, the user should select "Continue" from the pop-up window shown below in **Figure 250**.

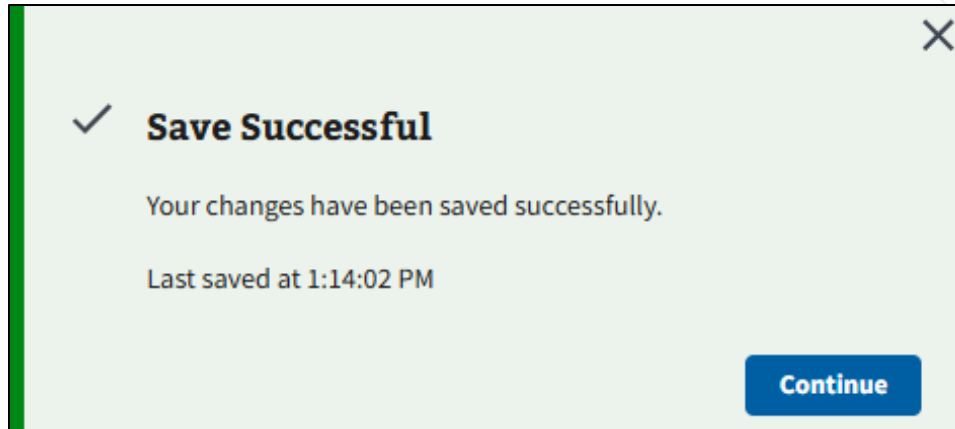


Figure 250: Saving in VA Self Scheduling

5. A timestamp will then be presented to the user, which details the date of the last modification(s) and the name of the person who had last modified shown in **Figure 251**.

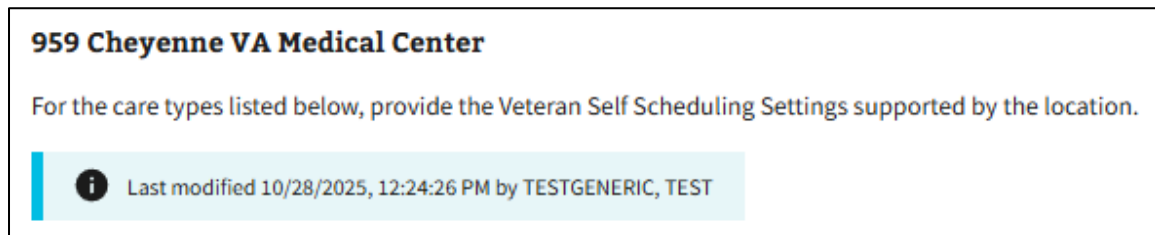


Figure 251: Time Stamp after Saving in VA Self Scheduling

7.2 Veteran Appointment Requests

Within the Veteran Appointment Requests tab, users can search and view Veteran Appointment Requests for a specific clinic. In addition to these capabilities, users with the correct edit permissions are able to edit Veteran Appointment Requests. Please note that services vary depending on location.

7.2.1 View Veteran Appointment Requests

1. Select the tab labeled “Veteran Appointment Requests” shown below in **Figure 252** to be directed to the Veteran appointment requests page.

VA CCM 442: Cheyenne VA Medical Cen...

- Clinic Configurations
- Clinic Audit Report
- Letters
- VA Tool Set
- Veteran Self Scheduling
- Veteran Appointment Requests**
- Annual Clinic Profile Review
- Resources

Veteran Appointment Requests

Warning: You are not authorized to make changes on this application. Contact your Clinical Applications Coordinator or Supervisor for assistance.

Info: Last modified 12/3/2024, 1:54:31 PM by RUSSELL, JOEL

Mandatory Categories of Care

Figure 252: Viewing Veteran Appointment Requests

2. Select the “+” shown in **Figure 253** to expand the pinned services accordion. Afterwards, the accordion view shown in **Figure 254** will appear.

Mandatory Categories of Care

[Expand all +](#)

Outpatient Mental Health - (502)	+
Primary Care - (322, 323, 350)	+

Figure 253: Pinned Services Button for Viewing VA Appointment Requests

[Collapse all -](#)

Outpatient Mental Health - (502)

Supported at this Facility? (*Required)

☒ Yes - Any Veteran

Submitted Request Limit (*Required)

☒ 1

Primary Care - (322, 323, 350)

Supported at this Facility? (*Required)

☒ No

Figure 254: Expanded Accordions of Viewing VA Appointment Requests

7.2.2 Edit Veteran Appointment Requests

*Disclaimer: This section of the guide is only applicable to users with the correct write access permissions. If the user does not have write access permissions set to the account, the user will receive the error message shown in **Figure 255**. If a user needs access to make changes on this application, please contact the local Clinical Applications Coordinator or Supervisor for assistance.*

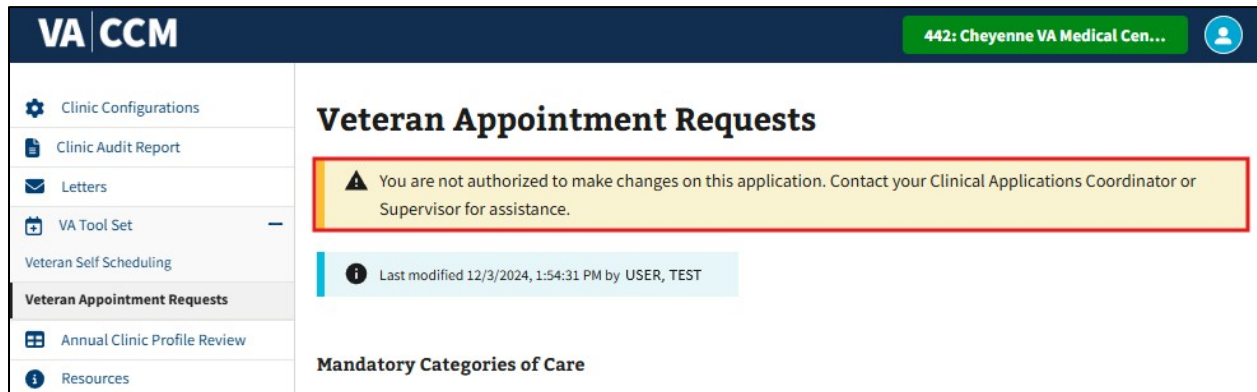


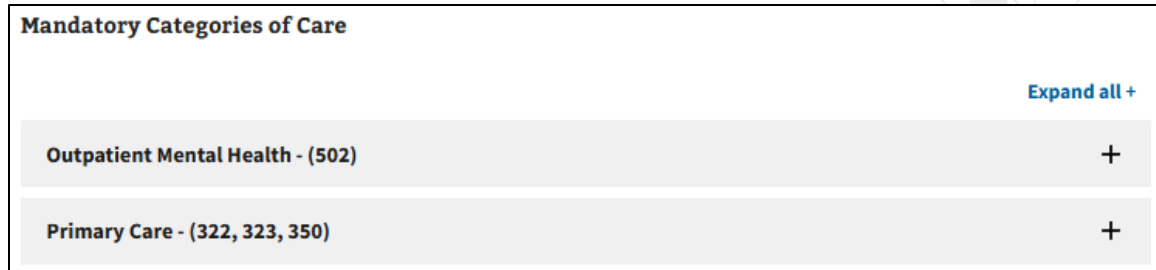
Figure 255: Authorization Error Message for VA Appointment Requests Settings

1. Select the tab labeled “Veteran Appointment Requests” shown below in **Figure 256** to be directed to the Veteran appointment requests page.



Figure 256: Veteran Appointment Requests Tab

2. Select the “+” shown in **Figure 257** to expand the pinned services accordion. Afterwards, the accordion shown in **Figure 258** will appear where the user will be able to edit selections.



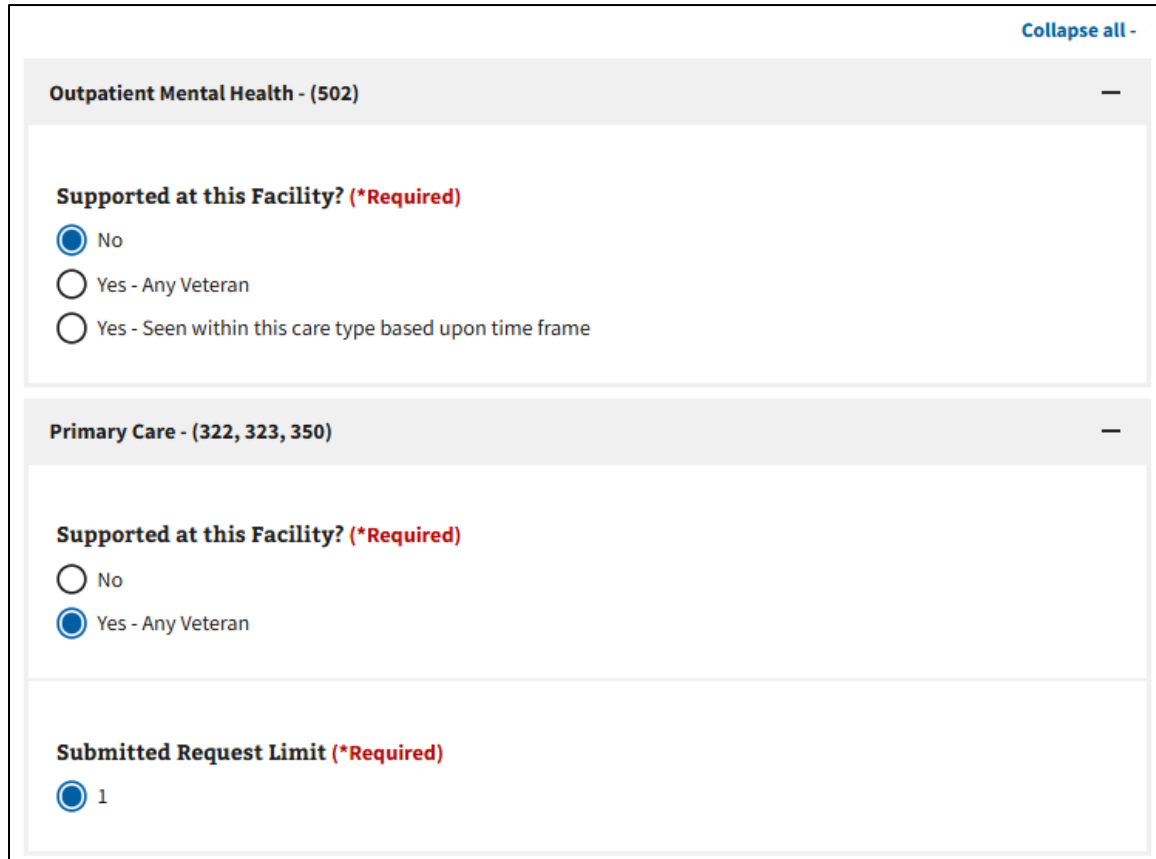
Mandatory Categories of Care

[Expand all +](#)

Outpatient Mental Health - (502) +

Primary Care - (322, 323, 350) +

Figure 257: Pinned Services Button for VA Appointment Requests



[Collapse all -](#)

Outpatient Mental Health - (502) —

Supported at this Facility? (*Required)

☒ No

☐ Yes - Any Veteran

☐ Yes - Seen within this care type based upon time frame

Primary Care - (322, 323, 350) —

Supported at this Facility? (*Required)

☐ No

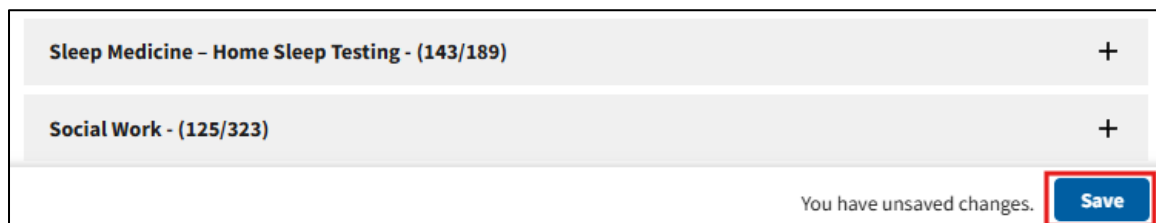
☒ Yes - Any Veteran

Submitted Request Limit (*Required)

☒ 1

Figure 258: Accordion View of VA Appointment Requests

- After making necessary changes, select the save button shown in **Figure 259**.



Sleep Medicine - Home Sleep Testing - (143/189) +

Social Work - (125/323) +

You have unsaved changes. **Save**

Figure 259: Save Button for VA Appointment Requests Settings

- ❖ *Note: The “Save” button only becomes available in the bottom right-hand corner on the Veteran Appointment Requests page when a minimum of one change has been made. If no change is made, the “Save” button as seen in **Figure 259** will not appear.*
- ❖ *Note: Some but not all fields are mandatory (*Required) and need to be populated before saving. If a user tries to save without populating a mandatory (*Required) field, the user will receive the error message shown in **Figure 260**.*

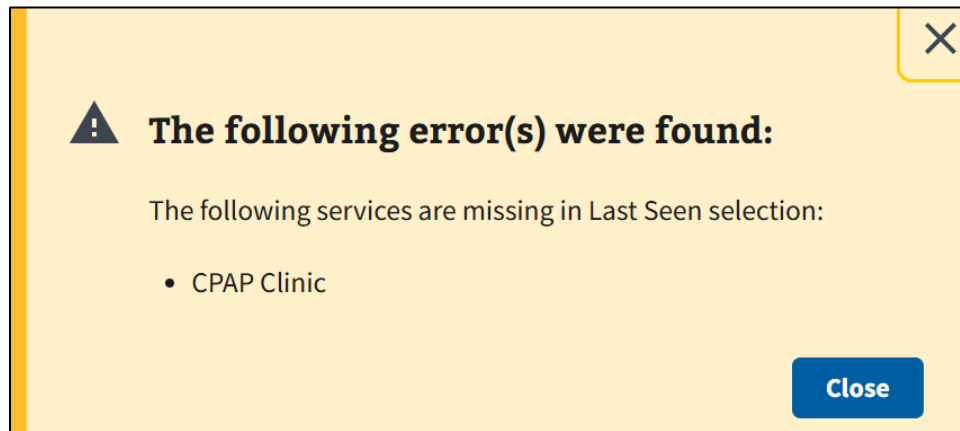


Figure 260: Error Field for Saving in VA Appointment Requests

4. Once the save is complete, the user should select “Continue” from the pop-up window shown below in **Figure 261**.

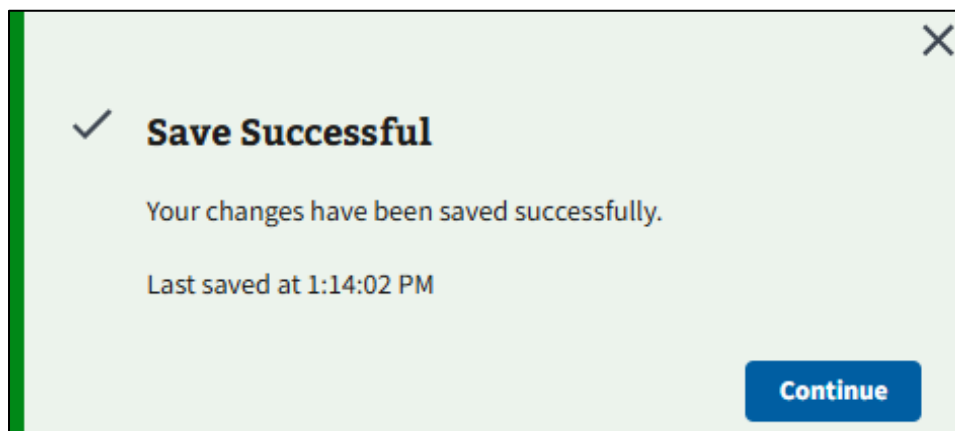


Figure 261: Saving in VA Appointment Requests

5. A timestamp will then be presented to the user, which details the date of the last modification(s) and the name of the person who had last modified shown below in **Figure 262**.

959 Cheyenne VA Medical Center

For the care types listed below, provide the appointment request settings supported by the location.

 Last modified 10/28/2025, 12:24:26 PM by TESTGENERIC, TEST

Figure 262: Time Stamp after Saving in VA Appointment Requests

8. Annual Clinic Profile Review

1. The Annual Clinic Profile Review page can be navigated to by selecting the Annual Clinic Profile Review tab shown in **Figure 263**.

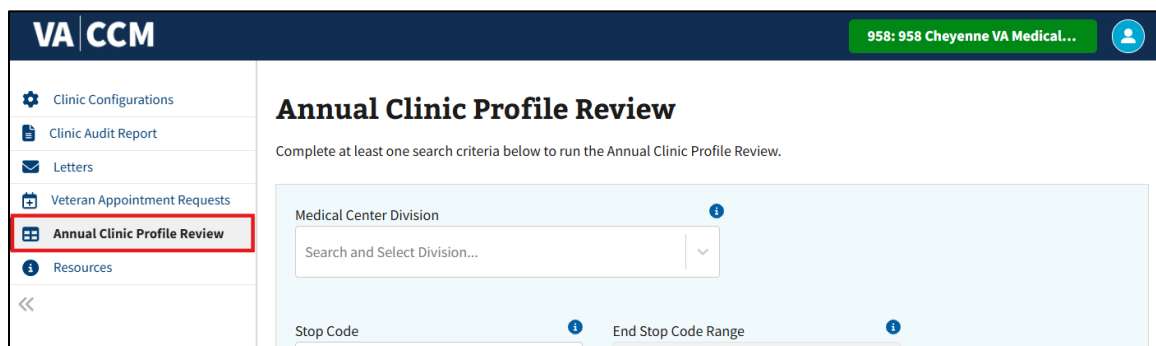


Figure 263: Annual Clinic Profile Review Tab

2. Users will need to complete at least one of the search criteria to select the “Run Report” button seen in **Figure 264**.

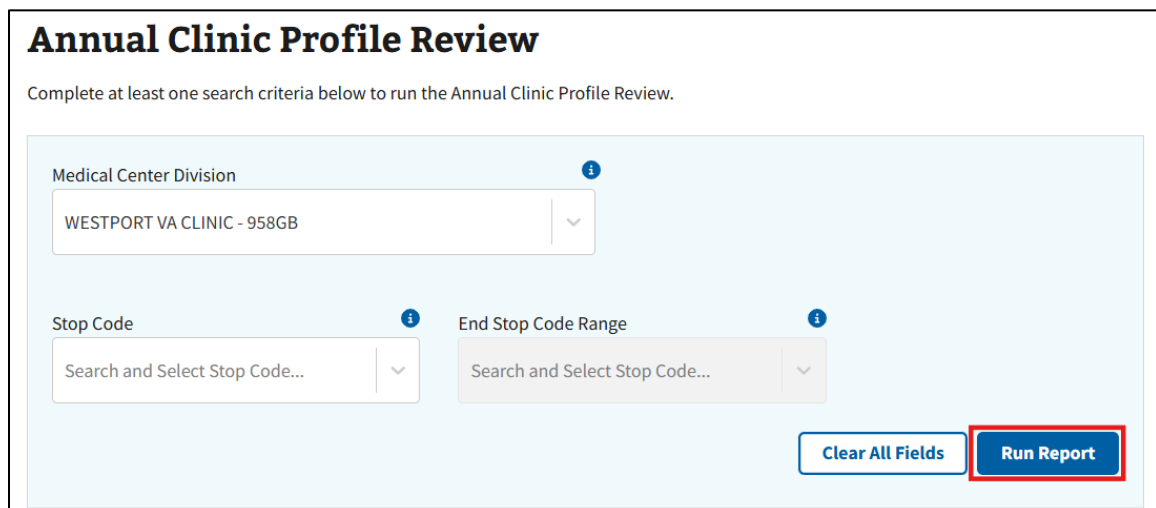


Figure 264: Run Report Button for Annual Clinic Profile Review

- ❖ *Note: CCM will only return active clinics. Clinics that have been inactivated will not be included in the report.*

3. Once the report has been run and valid results appear, the Clinic Profile Review Successful message will appear. Users will then select the “Click to download Clinic Profile Review” button, shown in **Figure 265**.

Medical Center Division

WESTPORT VA CLINIC - 958GB

Stop Code

Search and Select Stop Code...

End Stop Code Range

Search and Select Stop Code...

Clear All Fields

Run Report

✓ **Clinic Profile Review Successful**

Division: WESTPORT VA CLINIC - 958GB

[Click to download Clinic Profile Review](#)

Figure 265: Download Link for Annual Clinic Profile Review

- ❖ *Note: If the user tries to search for a clinic with no available results, the error message shown in **Figure 266** will appear.*

! **No Results Found**

No clinics returned for the criteria entered.

Figure 266: No Results Found Notification for Annual Clinic Profile Review

4. Once selected, the user will need to follow the on-screen browser instructions to save and download the file to the computer.

- ❖ *Note: If the user needs more information regarding annual clinic profile reviews, please select the Annual Clinic Profile Review button shown below in **Figure 267**.*

Resource Library

Veterans Affairs Medical Centers are required to conduct annual reviews of all outpatient clinic profiles for accuracy, necessity and appropriate utilization. The page linked below contains detailed process and certification information.

[Annual Clinic Profile Review](#)

Figure 267: Resource Information Link for Annual Clinic Profile Review

9. References

9.1 Additional Features and Options for CCM-UI

- Users can stay in their existing browser session to view and/or change their Site or Divisions that they are provisioned to. There is no need to log out and log back in every time.
- Job Guide/pdf link for new user orientation.
- [Link](#) to Clinic Profile Management Business Rules.
- Help desk contact info if users need assistance with the new CCM-UI application:
 - [YourIT Service Portal](#)
 - VA Help Desk: 855-673-4357
 - TTY: 844-224-6186
 - Veterans Crisis Hotline: 800-273-8255

9.2 Tool Tip Descriptions

Table 2: Tool Tip Descriptions

Field Name	Tool Tip Info	Section
Clinic Name (*Required)	Examples: SGV-PACT BLUE TEAM 1 PA or MIA/CVT DERMATOLOGY PRO	Mandatory
Patient Friendly Name (*Required)	Example: MOREHEAD VA VIDEO CONNECT PACT 3 DOCTOR SMITH	Mandatory
Stop Code (Primary)(*Required)	Three digit stop code number assigned to specific location. Each stop code number represents a type of care or Service/treating specialty (clinics only). Example: 001 - 999 Please confirm with your MCA Representative on using the correct stop code.	Mandatory
Medical Center Division (*Required)	Division name assigned to each entry in this file to identify where the specific location is. Only one division per location.	Mandatory

Select Provider(s) (*Required)	Provider must be active and have an active entry in the NEW PERSON file for PERSON CLASS	Mandatory
Length of Appointments (*Required)	Length of appointment designated for clinic. Type a whole number between 10 and 240 - must be a multiple of 10 or 15.	Mandatory
Telephone (*Required)	Example: 303-555-1212 or 303 555 1212	Mandatory
Telephone Extension (*Required)	Example: 542. If no extension is available, use N/A or n/a	Mandatory
Physical Location (*Required)	Where the Veteran will check-in for an appointment. Limit 25 characters. If the location does not require the patient to travel to a VA facility for the appointments, the service must ensure that the location reflects PHONE for telephone appointments and VIDEO CONNECT for VA connect appoints within all reminders (Pre-Appointment Letters, VEText, AudioCare)	Mandatory
Clinic meets at this facility?	Enter YES unless non-VA care	Preselected Default
Allow Direct Patient Scheduling?	This field will determine if patients can self-schedule into this clinic. A "Yes" in this field will enable patients to directly schedule appointments into this clinic. Default selection is set to Yes.	Preselected Default
Non-count Clinic?	Is this clinic to be a non-count clinic for workload purposes? OR are visits to this clinic to be included in workload statistics? Default selection is set to Yes	Preselected Default
Variable Appointment Length?	Does the clinic have variable appointment lengths? If length of appointment is 10 minutes, can user make longer appointments in	Preselected Default

	increments of 10 minutes when scheduling appointment?	
Display Appointments to Patients?	The Office of Community Care recommends that all appointments are viewable to our Veterans. Allows patients to view appointments in My HealtheVet and VA Online Scheduling. Default selection is set to Yes'	Preselected Default
Schedule on Holidays?	Should the user be able to schedule appointments on holidays for this location?	Preselected Default
Hour Clinic Display Begins	The hour clinic will begin displaying availability (e.g. 8 AM)	Preselected Default
Default Appointment Type	The default or usual appointment type to be associated with this clinic	Preselected Default
Max Days for Future Booking	Maximum number of days that can be available when clerk searching for open clinic slots in the future. Allows for 11 to 999 days in advance for future bookings.	Preselected Default
Display Increments Per Hour	Select the increment that best fits the length of appointment. Choose from: 60-Min; 30-Min; 15-Min; 20-Min; 10-Min.	Preselected Default
Overbooks Per Day Maximum	Number of allowable overbooks per day. If overbooks are not allowed, the number should be set to zero. Only Numeric values of 0 to 9999 are only allowed.	Preselected Default
Pre-Checkin Allowed?	This field will determine if PRE-Checkin is allowed for this clinic	Preselected Default
E-Checkin Allowed?	This field will determine if E-Checkin is allowed for the clinic.	Preselected Default

Administer Inpatient Meds?	This field should contain a YES only if the clinic location is authorized to dispense inpatient medications to outpatients.	Preselected Default
Workload Validation at Check Out?	Yes or 1 will result in a validation being performed on each checked out encounter for this clinic. No or zero will stop the validation of the encounters as they are checked out for this clinic. This validation is to help ensure that the workload data is acceptable to the Austin National Patient Care Database.	Preselected Default
Service Code	Enter the Service Line. Example would be Medicine, Surgery, etc.	Preselected Default
Abbreviations	Consistency will help schedulers have easy access to the clinic. Example: Community Care clinics must enter abbreviation COMCARE. This will be utilized for reporting.	Optional
Credit Stop Code (Secondary)	Enter the Stop Code which should be credited for an appointment to this clinic (only if Code different than the one assigned to this clinic). Appointments to this clinic will receive this stop code credit in addition to the 'normal' stop code credit if a stop code different from the 'normal' stop code for this clinic is entered here. Example: 001 - 999	Optional
Select Default Provider	Please select one default for Provider	Optional
Clinic Cancellation Letter	Enter the clinic cancellation letter to be associated with this clinic, so if clinic is cancelled, this letter will print as opposed to generic clinic cancellation letter.	Optional

No Show Letter	Enter the no-show letter to be associated with this clinic, so if patient does not show for appointment, this specific no-show letter will print as opposed to the generic no-show letter.	Optional
Pre-Appointment Letter	Enter the pre-appointment letter to be associated with this clinic, so if letters are generated, this specific pre-appointment letter will print as opposed to the generic pre-appointment letter	Optional
Appointment Cancellation Letter	Enter appointment cancellation letter to be associated with this clinic, so if veteran cancels appointment, this letter will print as opposed to generic appointment cancellation letter.	Optional
Special Instructions	Special instructions (free text) entered by clerk at time of making the appointment. If you have new instructions, please remove the old ones. It is preferable to keep this as short and simple as possible. Example instructions: SCHEDULE CONSULTS IN PM, FOLLOW-UPS IN AM.	Optional
Prohibit Access to Clinic?	Should only privileged users have access to book to this clinic?	Optional
Add/Remove Privileged User(s) (*Required)	Current list shows existing Privileged Users associated to this facility/clinic. Please select a name to remove any users from current list.	Optional
Select Day of Week (*Required)	Select week for date range from Sunday through Saturday to view Timeslots of the week.	Clinic Configuration → Clinic Availability accordion panel
Single Day	Single Day allows new timeslot entries that will not repeat. Can add multiple entries for that day.	Add/Modify Timeslot Modal

Indefinite	Indefinite allows new timeslot entries that will repeat indefinitely until new timeslots overwrite any pre-existing entries. Can add multiple entries for that day.	Add/Modify Timeslot Modal
Multi-select	Multi-Select allows timeslot entries associated to that day to repeat in multiple weeks as needed. Can add multiple entries for that day.	Add/Modify Timeslot Modal

9.3 Additional Help with Errors

9.3.1 Connection Issues Error

If users receive the 500 Error Message seen below in **Figure 268**, please contact IT Support. Go to [YourIT Service Portal](#) to open a new ticket or view existing service tickets.

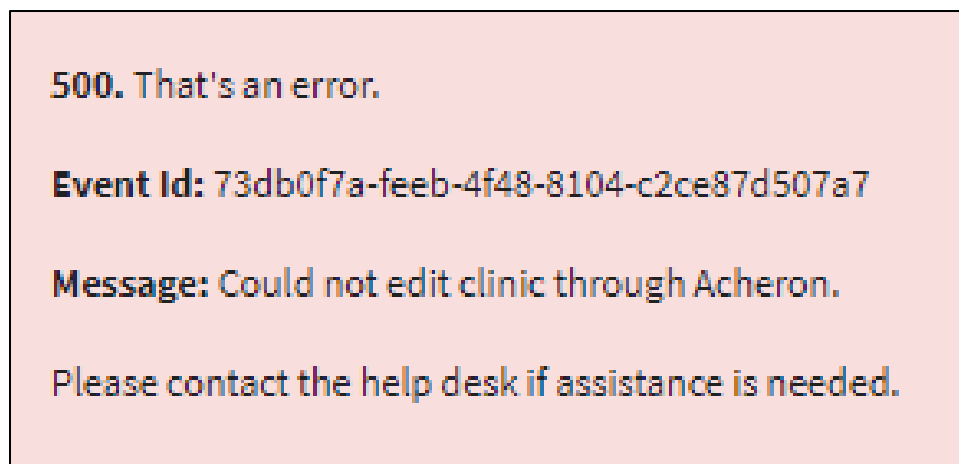


Figure 268: 500 Error Message for Connection

Possible Root Cause: An API connection to the database is down or impaired.

Additional Resources:

- VA Help Desk: 855-673-4357
- TTY: 844-224-6186

9.3.2 Server Issue Error

If users receive the 500 Error Message seen below in **Figure 269**, please contact IT support. Go to [YourIT Service Portal](#) to open a new ticket or view existing service tickets.

500. That's an error.

There was a server issue - refresh or try again later. Please contact the help desk if assistance is needed.

Figure 269: 500 Error Message for Server Issues

Possible Root Cause: Possible recent server reboot. Please select your browser refresh and try again. If the issue persists, please contact your IT support.

Additional Resources:

- VA Help Desk: 855-673-4357
- TTY: 844-224-6186