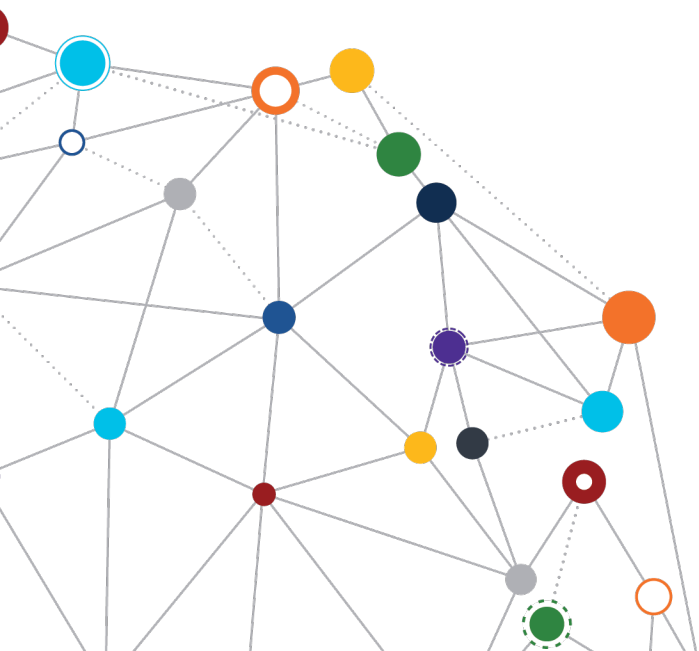




# VS GUI User Guide Addendum

*Release 1.7.1 Update*



**VA**



**U.S. Department of Veterans Affairs**  
Office of Information and Technology  
Enterprise Program Management Office



## Revision History

Date	Revision	Description	Author
09/09/2020	1.2	Updated install period, table of contents and list of figures.	REDACTED
07/23/2020	1.1	All changes accepted, updated Figure 3, 8, 9, and 12 with new screenshots, updated table of contents and list of figures.	REDACTED
07/13/2020	1.0	Created 1.7.1 Release Update Feature Documentation	REDACTED

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## 1 Introduction

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

### 1.1 Purpose

The Veterans Health Administration (VHA) Office of Veterans Access to Care (OVAC) requested an enterprise enhancement for the VS package that supports COVID-19 response. The enhancement reduces operating costs for VHA and improves operational efficiencies, resulting in patient-centered access to care, coordinated care, increased customer satisfaction, and the reduction of excessive cycle/wait time for scheduling patients.

### 1.2 Overview

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

### 1.3 Disclaimers

#### 1.3.1 *Software Disclaimers*

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#### 1.3.2 *Documentation Disclaimers*

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

## 1.4 Project References

### 1.4.1 Information

The VS GUI points of contact (POCs) include:

» REDACTED

#### VSE Resources

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

## 2 System Summary

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

This update is for the nationally released version 1.7.1, which includes VS GUI 1.7.1 R1 and VistA patch SD\*5.3\*745. At time of publishing, install period is projected for September 2020. This update includes the following:

- » Ability to view Computerized Patient Record System (CPRS) consult tab details from Request Management (RM) Grid.
- » Update Clinically Indicated Date (CID) labels to Patient Indicated Date (PID) throughout the application.
- » Ability to save updated PID for an appointment previously cancelled by patient or no show.
- » Addition of new cancellation reason “PANDEMIC” to use for COVID-19 related cancellations.
- » Addition of columns to the RM grid displaying the number of contact attempts (phone) and the last date a letter contact attempt was made.
- » Allow View Only users to access contact attempts screen.
- » Realigning of RM grid to improve logic and increase real estate.

## 3 Key Feature Updates in Version 1.7.1

### 3.1 Ability to View CPRS Consult Tab Details from RM Grid

Schedulers can see the CPRS Consult tab detail as the View Request option for Consults. Right-click on a consult in the RM Grid and navigate to APPT/Veteran Disposition > View Request. This will open consult details found in CPRS.

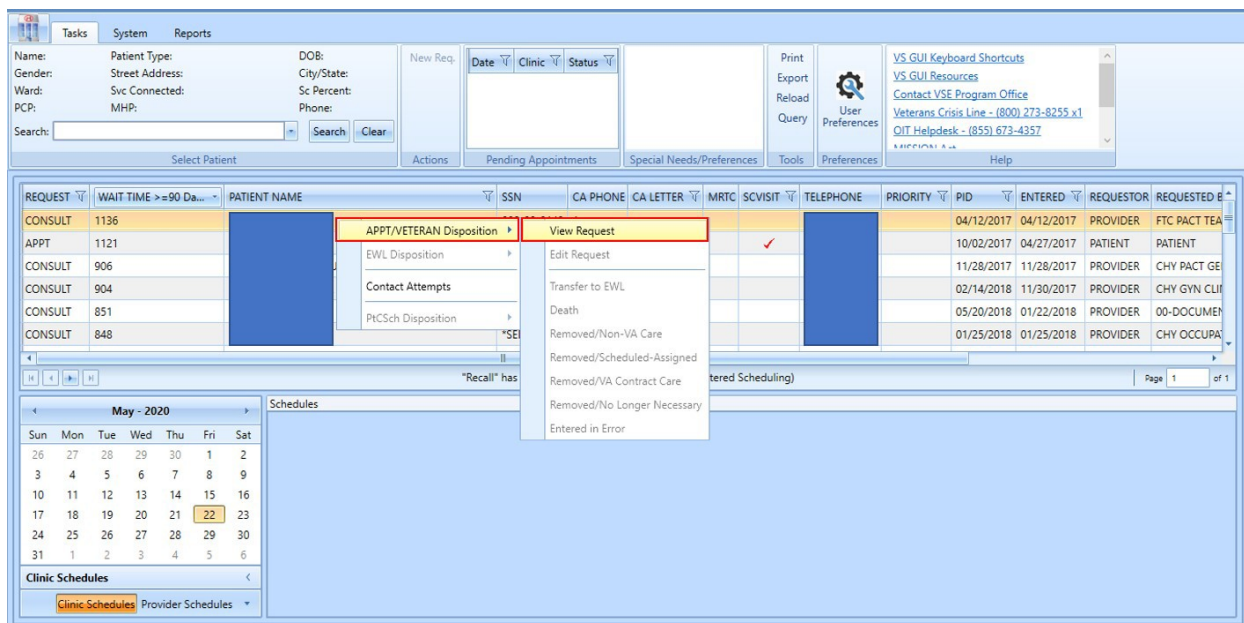


Figure 1: Display CPRS Consult Tab Details

This is the Consult View in VS GUI. This view is the top part of the consult view and the scheduler will easily see the PC Provider, Primary Eligibility, Requesting Provider and the Urgency.

The screenshot shows a window titled "Patient Consult Detail - 1" with standard Windows window controls (minimize, maximize, close). The window contains the following information:

- Current PC Provider:
- Current PC Team: TEAM FTC 2
- Current Pat. Status: Outpatient
- Primary Eligibility: SERVICE CONNECTED 50% to 100%(VERIFIED)
- Patient Type: SC VETERAN
- OEF/OIF: NO
- Service Connection/Rated Disabilities
  - SC Percent: 100%
  - Rated Disabilities: BIPOLAR DISORDER (100%)  
IRRITABLE COLON (10%)  
HEMORRHOIDS (0%)
- Order Information
  - To Service: PHARM.AC.INTERRUPTION.OUTPT
  - From Service: CHY ANTICOAG
  - Requesting Provider:
  - Service is to be rendered on an OUTPATIENT basis
  - Place: Consultant's choice
  - Urgency: Routine
  - Clinically Ind. Date: Jan 29, 2018
  - Orderable Item: PHARM.AC.INTERRUPTION.OUTPT
  - Consult: Consult Request
  - Provisional Diagnosis: DVT
  - Reason For Request:  
\*\*\*ANTICOAGULATION INTERRUPTION (BRIDGE THERAPY) CONSULT\*\*\*

An "OK" button is located at the bottom right of the window.

Figure 2: Patient Consult Detail Window - 1

This bottom part of the Consult View will allow the scheduler to view the Status and the Facility Activity of the consult.

**Patient Consult Detail - 1**

Reason For Request:  
MADE IN VISTA PROCESSED IN GUI

Inter-facility Information  
This is not an inter-facility consult request.

Status: ACTIVE  
Last Action: STATUS CHANGE

Facility

Activity	Date/Time/Zone	Responsible Person	Entered By
-----			
CPRS RELEASED ORDER	03/20/20 09:22	PATEL,PRANSHUKUMA	PATEL,PRANSHUKUMA
SCHEDULED	03/20/20 11:39	PATEL,PRANSHUKUMA	PATEL,PRANSHUKUMA
CHY CARDIOLOGY Consult Appt. on 03/20/20 @ 03:00			
CONSULT SCHEDULED FROM VISTA			
STATUS CHANGE	03/20/20 11:43	PATEL,PRANSHUKUMA	PATEL,PRANSHUKUMA
CHY CARDIOLOGY Appt. on 03/20/20 @ 03:00 was a no-show.			

Note: TIME ZONE is local if not indicated

No local TIU results or Medicine results available for this consult

===== END =====

OK

Figure 3: Patient Consult Detail Window - 2

### 3.2 Update CID Date Label to PID Throughout the Application

The CID date label has been updated to reflect PID in all views of the application. The CID/Preferred Date is replaced with PID Date in the following locations: RM Grid(headers), RM Grid(export), RM Grid(print), User Preferences, New APPT Request Window and View Request Window.



REQUEST	WAIT TIME >=90 Da...	PATIENT NAME	SSN	CA PHONE	CA LETTER	MRTC	SCVISIT	TELEPHONE	PRIORITY	PID	ENTERED
CONSULT	1136			1				(999) 999-9999		04/12/2017	04/12/2017
APPT	1121			11	05/20/2020		✓	(555) 555-5555		10/02/2017	04/27/2017
CONSULT	906							(444) 444-4444		11/28/2017	11/28/2017
CONSULT	904							(444) 444-4444		02/14/2018	11/30/2017
CONSULT	851							(777) 777-7777		05/20/2018	01/22/2018
CONSULT	848							(777) 777-7777		01/25/2018	01/25/2018

Figure 4: CID Date Label Updated to PID in RM View

When viewing the appointment request, CID has been changed to PID.

**View Appointment Request for**

**Patient Information**

Name: [Redacted] DOB: [Redacted] SSN: [Redacted]

Gender: Male Institution: CHEYENNE VA MEDICAL Originating Date: 04/27/2017

Originating User: [Redacted] Priority Group: [Redacted] Ethnicity: [Redacted]

Race: [Redacted] Address: [Redacted] City: [Redacted] State: WY Zip Code: [Redacted]

Country: United States Phone (residence): (555) 555-5555 Phone (work): [Redacted]

Bad Address? ☐ Svc Related ☒ Veteran ☐

**Special Needs/Preferences**

NOTE: Ctrl-p to Edit the Patient Information / Special Needs / Preferences

**Request Information**

☒ Clinic ☐ Service/Specialty **PID Date:** 10/02/2017 Appointment Type: REGULAR

Requested By: PATIENT Provider: [Redacted] Status: NEW

☐ Multiple Appointments Required

Comment: [Redacted]

OK Cancel

Figure 5: CID Date Label Updated to PID in Appointment Request

### 3.3 Ability to Save Updated PID for an Appointment Previously Cancelled by Patient or No Show

When rescheduling a previously cancelled by patient or no-show appointment, the scheduler will be able to enter a new PID date prior to rescheduling. In the past the scheduler would have no option to change the original date entered in the request after the initial cancellation.

The screenshot shows a web-based form titled "Edit Appointment Request for". The form is divided into several sections:

- Patient Information:** Includes fields for Name, DOB, SSN, Gender (Male), Institution (CHEYENNE VA MEDICAL), Originating Date (05/22/2020), Originating User, Priority Group (GROUP 3), Ethnicity (HISPANIC OR LATINO), Race, Address, City, State (WY), Zip Code, Country (United States), Phone (residence) ((111) 111-1111), and Phone (work). There are also checkboxes for "Bad Address?", "Svc Related" (checked), and "Veteran".
- Special Needs/Preferences:** A section with a note: "NOTE: Ctrl-p to Edit the Patient Information / Special Needs / Preferences".
- Request Information:** Includes radio buttons for "Clinic" (selected) and "Service/Specialty", a dropdown for "CHY ANTICOAG", a "PID Date:" field with a calendar icon, and an "Appointment Type" dropdown set to "REGULAR".
- Requested By:** A dropdown menu set to "PATIENT".
- Multiple Appointments Required:** A checkbox that is unchecked.
- Comment:** A text area for additional notes.

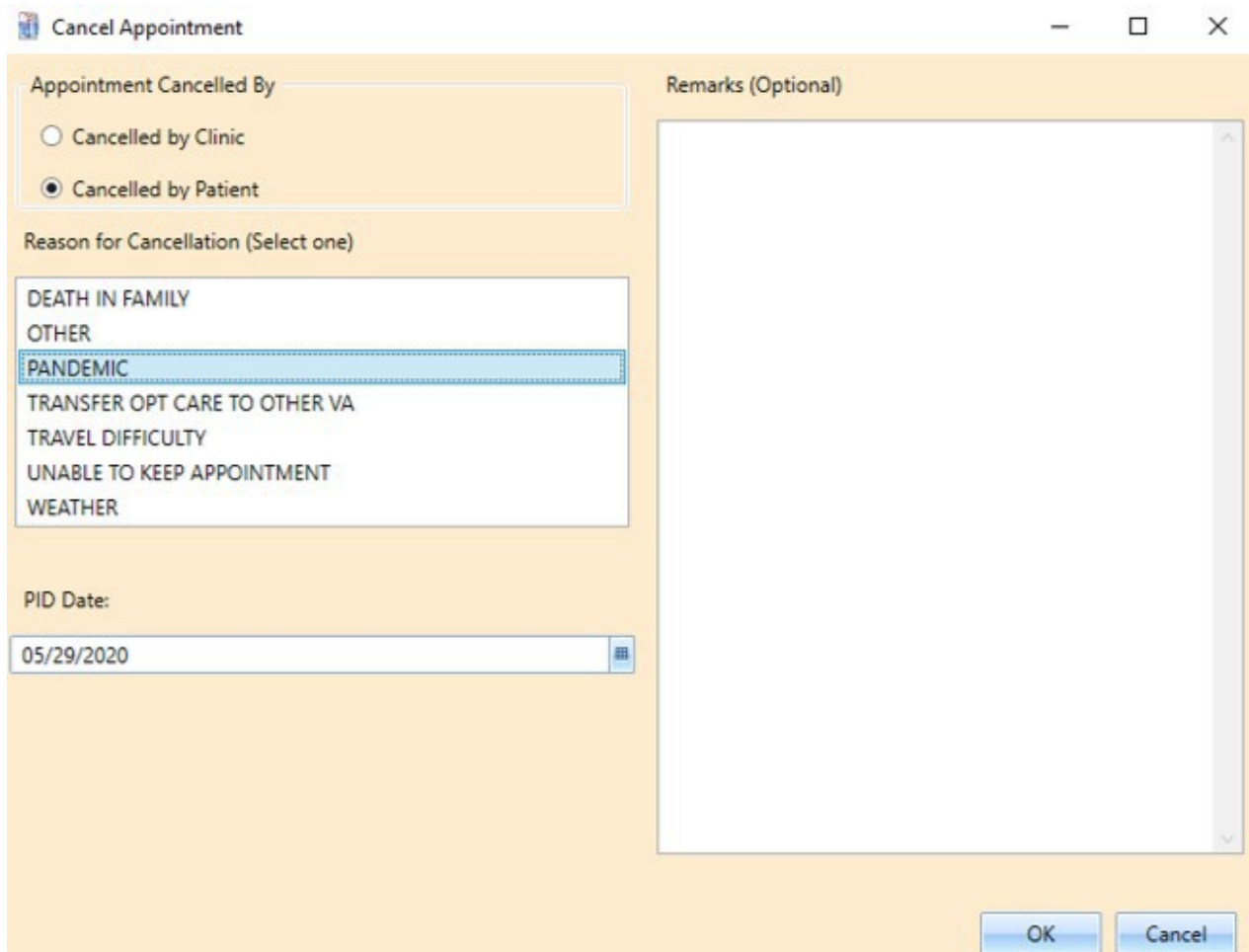
A calendar for June 2020 is displayed, showing the dates from 23 to 27. The date 18 is highlighted in yellow, indicating the new PID date. The calendar is titled "June - 2020" and shows the days of the week: Sun, Mon, Tue, Wed, Thu, Fri, Sat.

At the bottom right of the form, there are "OK" and "Cancel" buttons.

Figure 6: PID Can be Updated to Reflect Change After Cancellation by Patient

### 3.4 Addition of new cancellation reason “PANDEMIC” to use for COVID-19 related cancellations

Schedulers will now be able to choose PANDEMIC as a reason for cancellation. In the past the scheduler would have to choose “Other” and then type remarks as indicated by local/national guidelines.



The screenshot shows a 'Cancel Appointment' dialog box. It has a title bar with a close button. The main area is divided into two sections. The left section is titled 'Appointment Cancelled By' and contains two radio buttons: 'Cancelled by Clinic' and 'Cancelled by Patient', with the latter being selected. Below this is a section titled 'Reason for Cancellation (Select one)' which contains a list box with the following options: 'DEATH IN FAMILY', 'OTHER', 'PANDEMIC' (which is highlighted with a blue selection bar), 'TRANSFER OPT CARE TO OTHER VA', 'TRAVEL DIFFICULTY', 'UNABLE TO KEEP APPOINTMENT', and 'WEATHER'. Below the list box is a 'PID Date:' label and a text box containing '05/29/2020'. The right section is titled 'Remarks (Optional)' and contains a large, empty text area. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Figure 7: PANDEMIC as Cancellation Option

### 3.5 Addition of Contact Attempt Column to RM Grid

Schedulers will now see the number of phone Contact Attempt (CA) and the date a CA letter was sent when viewing the RM Grid. The contact attempts view will show the attempted date/time, comments from the scheduler, and the name of the scheduler who entered them.

VistA Scheduling

VistA Scheduling for Division: UNASSIGNED

Tasks System Reports

Name: Patient Type: SC VETERAN DOB: New Req.  
Gender: M Street Address: City/State:  
Ward: Svc Connected: YES Sc Percent: 10  
PCP: MHP: Phone: (222) 222-2222

Search: [Text Box] Search Clear

Select Patient Actions Pending Appointments Special Needs

REQUEST	WAIT TIME <30 Days	PATIENT NAME	SSN	CA PHONE	CA LETTER	MRTC	SCVISIT	TELEPHONE	PRIORITY	PID	EN
APPT	27							(222) 222-2222	GROUP 3	06/25/2020	06

APPT/VETERAN Disposition  
EWL Disposition  
**Contact Attempts**  
PtCSch Disposition

"Recall" has been renamed to "PtCSch" (Patient Center)

July - 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	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	31	1
2	3	4	5	6	7	8

Clinic Schedules

(Select a Clinic)

Schedules

Figure 8: Display Contact Attempt Information in the RM Grid

To document new contact attempt information, select the requested patient's name from the list in the request grid, right-click and from the dialog box select Contact Attempts. The Contact Attempt dialog box displays showing the request information about the patient and the option to enter Call or Letter contact attempt. When submitting the new contact attempt details the information will be displayed at the bottom of the new Contact Attempt screen and highlighted in Green.

**Request Information**

Patient Name:   
 Desired Appt Date: **06/25/2020**  
 Home Phone: **(222) 222-2222**  
 Work Phone:

Clinic Name: **C/T CHY TEST1.7.1**  
 Request Type: **APPT**  
 Cell Phone: **(222) 222-2222**

**New Contact Attempt**

Contact Type: ☒ Call ☐ Letter  
 Date/Time: **07/22/2020** **15:46:04**  
 Comments:

**Contact Attempts**

Attempted Date/Time	Current	Type	Comments	Entered By	Entered Date/Time
7/22/2020 3:45:08 PM	True	Call	CALLED PATIENT TEST		7/22/2020 3:46:04 PM
7/22/2020 3:30:00 PM	True	Letter	LETTER SENT TO PATIENT		7/22/2020 3:45:08 PM

Figure 9: New Contact Attempt Entry Window

### 3.6 Allow View Only Users to Access Contact Attempts Screen

View-Only users will have the ability to view when a patient was last contacted. The screen layout remains the same for View-Only users, but certain options will be grayed out. View only users cannot make any changes or submit any contact attempts. The figure below shows the drop down with “Contact Attempts” as an available option when the user right clicks on the request.

**Tasks**

Name:  Patient Type: SC VETERAN DOB:   
 Gender: M Street Address:  City/State:   
 Ward:  Svc Connected: YES Sc Percent: 10  
 PCP:  MHP:  Phone: (888) 888-8888

**Actions** Pending Appointments Special Needs/Preferences Tools Preferences Help

**REQUEST** WAIT TIME All Days PATIENT NAME SSN CA PHONE CA LETTER MRTC SCVISIT TELEPHONE PRIORITY PID ENTERED REQUESTOR REQUESTED BY

PtCSch 791 APPT/VETERAN Disposition 27 (888) 888-8888 GROUP 3 04/04/2018 04/04/2018 PROVIDER  
 PtCSch 655 EWL Disposition 27 (888) 888-8888 GROUP 3 08/18/2018 08/21/2017 PROVIDER

**June - 2020**

**CLINIC SCHEDULES**

GLY PACT TEAM 3 PRE-VISIT AM

**Time Slot Viewer**

3 - 9 June 2020

03 Wednesday 04 Thursday 05 Friday 06 Saturday 07 Sunday 08 Monday 09 Tuesday

6:00 AM :15 :30 :45 1 1 1 1 1 1  
 7:00 AM :15 :30 :45 1 1 1 1 1 1  
 8:00 AM :15 :30 :45 1 1 1 1 1 1

**Availability:** Unavailable Available Overbook **Appointments:** 1.New 2.Walk In 3.No Show 4.Check In 5.Check Out

Figure 10: RM Grid View for “View Only” Users



Figure 11: Contact Attempt View for “View Only” Users

### 3.7 Realigning of RM grid to improve logic and increase real estate

There are changes to existing RM grid field titles and the default order which can be changed with the User Preferences option. Any changes from the default order can also be saved to the user’s personal preference.

1. Updated headers for existing fields
  - Request Type = Request
  - CID/Preferred Date = PID
  - Entered/RR No Date = Entered
2. The new default sort order of the RM Grid is as follows:
  - Request
  - Wait Time
  - Patient Name
  - SSN (*repositioned*)
  - CA Phone (Contact Attempts/Phone - *New Field*)
  - CA Letter (Contact Attempts/Letter - *New Field*)
  - MRTC
  - SCVisit
  - Telephone
  - Priority
  - PID
  - Entered
  - Requestor
  - Requested By
  - Clinic/Service
  - Comment

### 3.8 Validate VS GUI Version Matches Current Build Release

After the introduction of 1.7.0.1 VS GUI, if a user tries to login with the wrong version of VS GUI, the user will receive a popup message requiring them to install the latest VS GUI version.

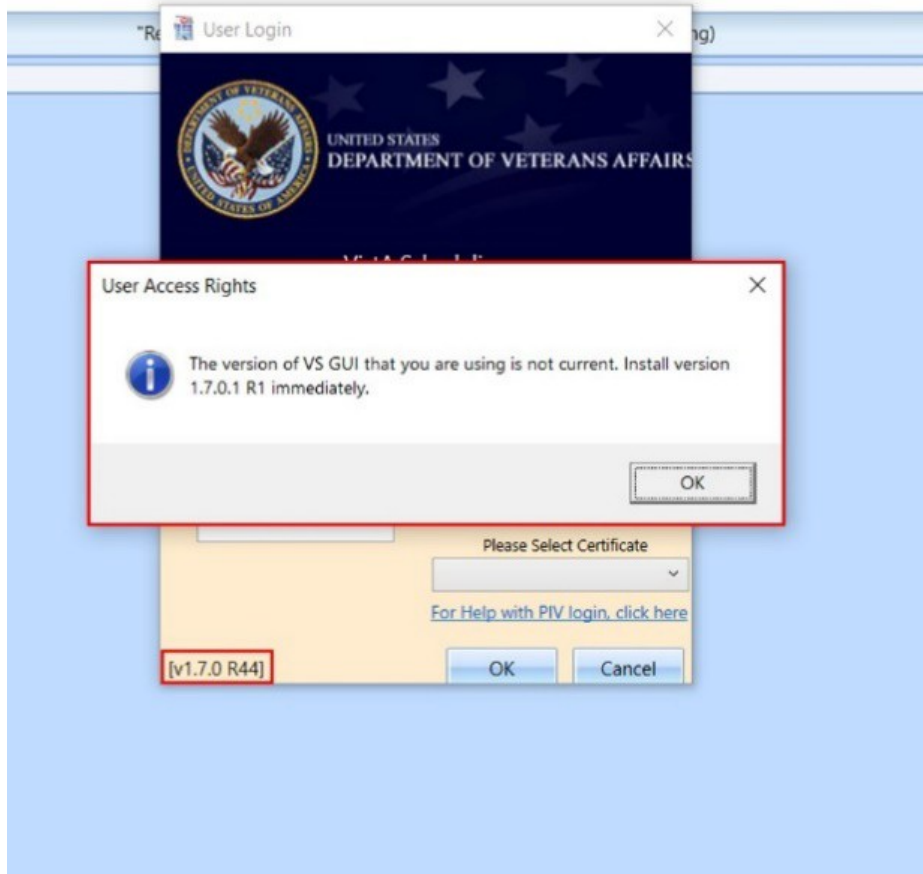


Figure 12: Wrong VS GUI version error message