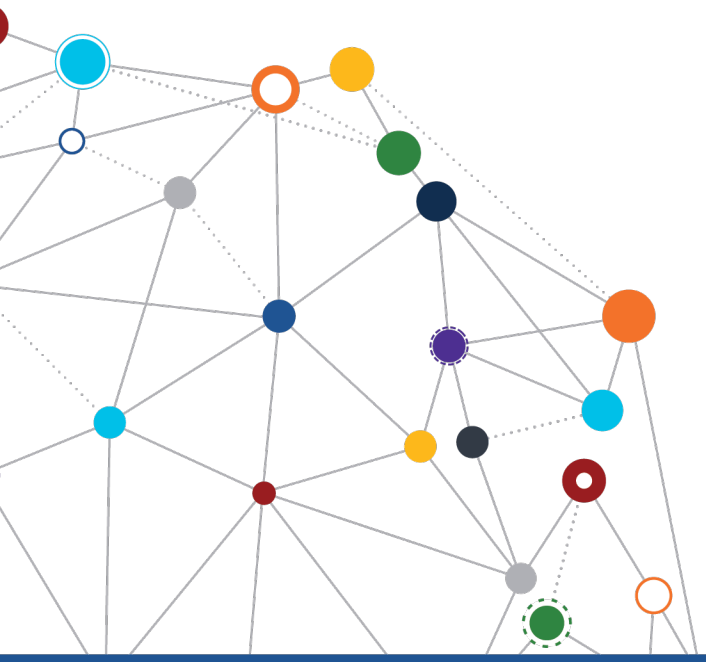
OFFICE OF
INFORMATION
AND TECHNOLOGY

Integrated Scheduling Solution User Guide

January 2025



VA

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

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Revision History

Date	Version	Description	Author
1/6/2025	1.14.0	Added information on Comment Tracking and a section on the Scheduling Activity Report	Liberty ITS
11/22/2024	1.13.3	Removed Show/Hide Columns section, added section on Refresh Table, added information on VVC Ready and Undo Check out	Liberty ITS
11/5/2024	1.12.0	Updated UI changes in the Check In section	Liberty ITS
10/29/2024	1.11.11	Updated UI changes in the Patient Overview section, and in the System section	Liberty ITS
10/02/2024	1.11.2	Updated UI changes in the Introduction and Contact Attempts section, removed information on VVC Ready Status	Liberty ITS
8/29/2024	1.8.6	Updated Video Visits section to reflect UI changes	Liberty ITS
8/14/2024	1.7.1	Added section about the demographics banner	Liberty ITS
7/31/2024	1.5.4	First Release for ISS User Guide	Liberty ITS

1. Introduction

1.1 Overview

The Integrated Scheduling Solution (ISS) is a web version of the VistA Scheduling Enhancements (VSE) GUI, utilizing the JavaScript React framework and providing equivalent appointment management functions used in the original application. The purpose of ISS is to deliver users with a modernized look and feel while reducing operating costs and improving operational efficiencies. With this document, users can familiarize themselves with important features and navigational elements of ISS, including patient search, patient appointments and requests, calendar search, query tool, privileged user functionality, and clinic group creation.

This document is intended for ISS users supporting the Veterans Health Administration (VHA). See below for details on the authorized users and their responsibilities.

Table 1: ISS User Profiles

User	Description and Responsibilities
Scheduler	Users responsible for creating and processing patient requests and scheduling appropriate care.
Scheduling Supervisor	Users can create requests and schedule appointments. These users also have additional capabilities such as creating clinic groups or adding privileged users to prohibited clinics.
View Only	This user profile is intended for those who need the ability to view clinic schedules and patient appointment information, but do not need the ability to schedule appointments.

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 ISS.
3. The user will also need to ensure that the specific VistA keys are assigned to their account before being able to complete certain tasks. Schedulers will need SDECZMENU. Scheduling Supervisors will need SDECZMGR. For overbook privileges, users will need either SDOB or SDMOB (See **4.3.7 Overbooking an Appointment** for more information).
    - ❖ *Note: For users who do not have the appropriate keys, please contact your Supervisor or yourIT for assistance.*

1.3 PIV Login

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



Figure 1: 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 2**. If authentication is successful, ISS will load. If it is not successful, you will be prompted to enter your correct PIN instead.

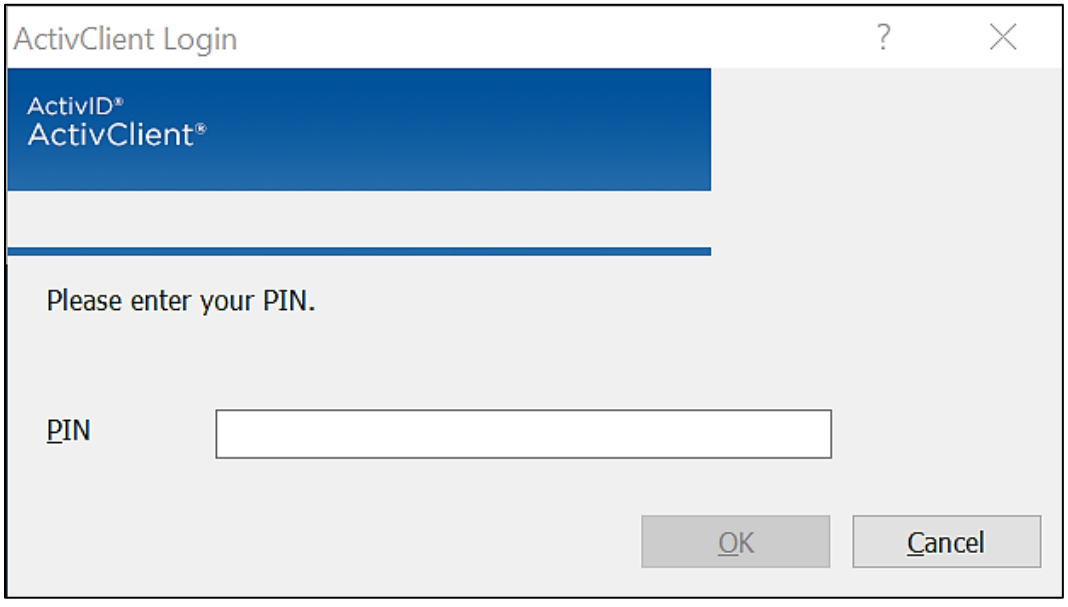


Figure 2: ActivClient Login Pop-Up Window

2. Familiarizing Yourself with ISS

2.1 Home Page

Once log in is complete, users will see the ISS homepage as seen in **Figure 3**.

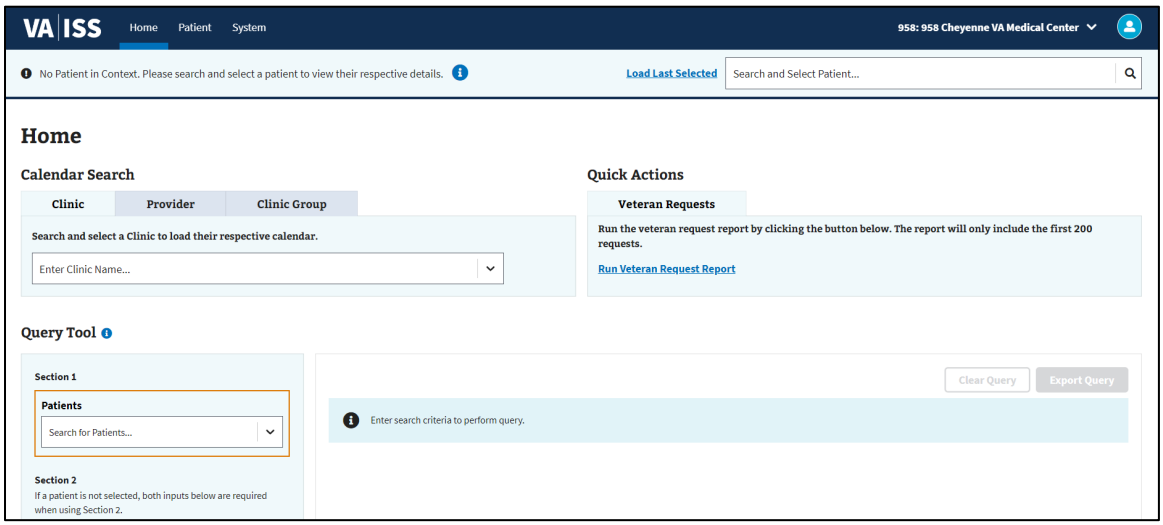


Figure 3: ISS Home Page

2.1.1 Changing Site Locations

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

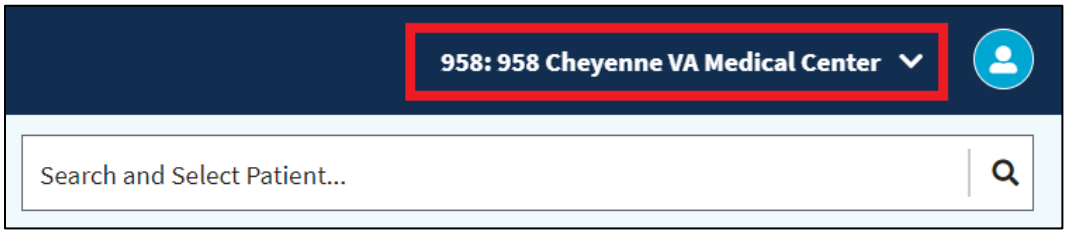


Figure 4: Site Locations

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.

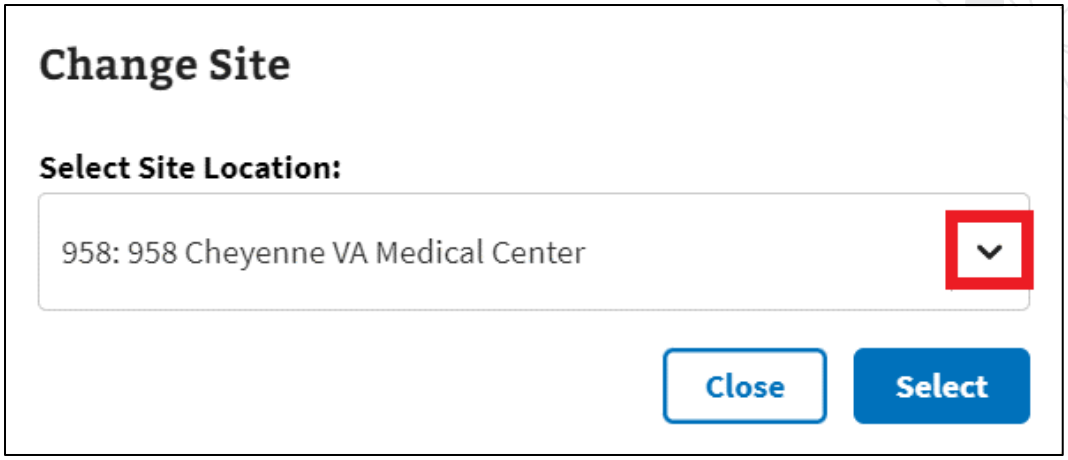


Figure 5: Dropdown Arrow for Changing Site Locations

- *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.*

3. The user can then select the "Select" button seen below in **Figure 6** to view the chosen site.

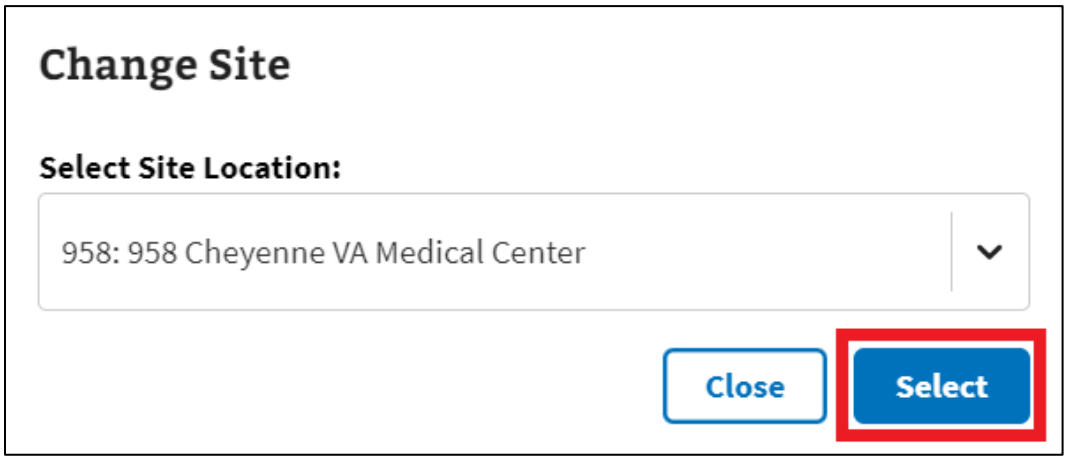


Figure 6: Select Button on Changing Site Locations Window

- *Note: The "Close" button shown in **Figure 7** can be selected at any time to close the pop-up window and continue with the default site location.*

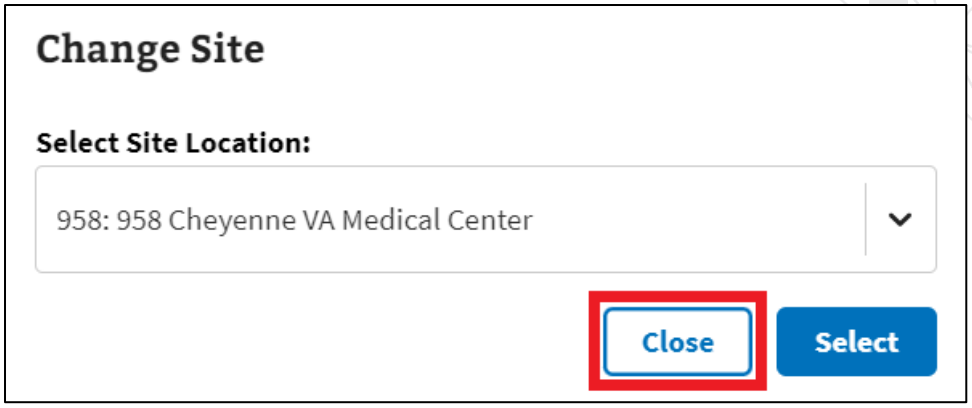


Figure 7: Close Button on Changing Site Locations Window

2.1.2 Veteran Requests Report

1. To export a Veteran Request report, the user can select the "Run Veteran Request Report" button seen in **Figure 8**.

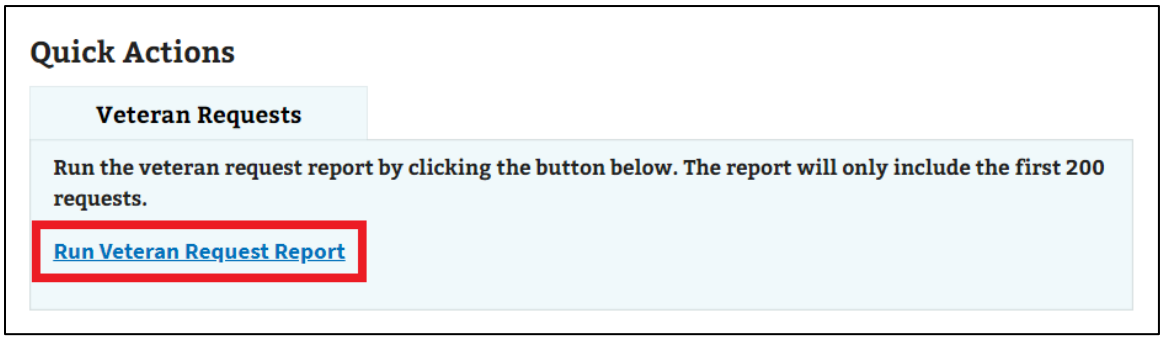


Figure 8: Run Veteran Request Report Button

2. After selecting the button, the Veteran Requests page, seen in **Figure 9**, will display.

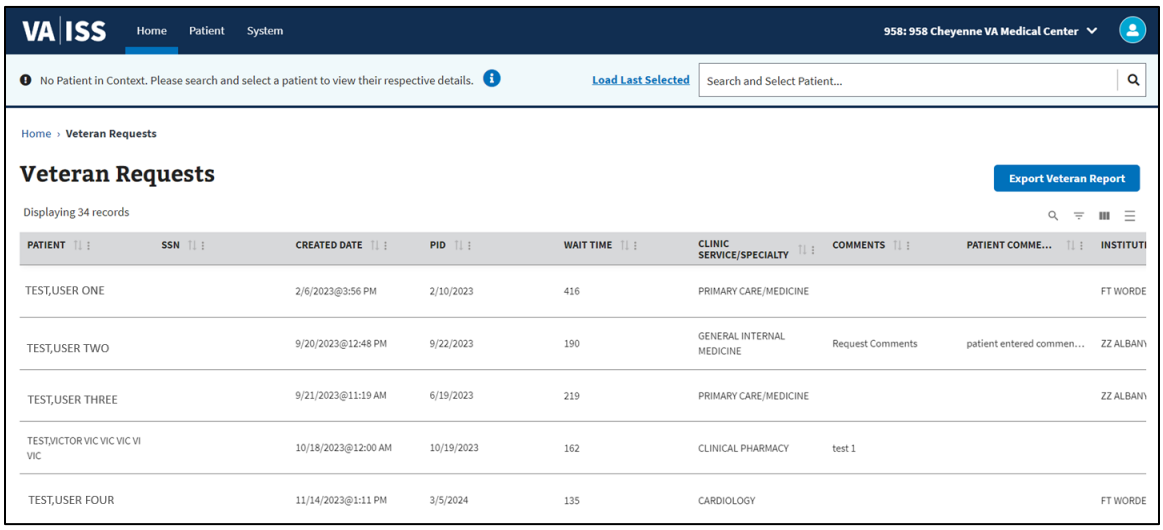


Figure 9: Veteran Requests Report Page

- ❖ *Note: The report will only include the first 200 requests.*

3. To export, select the "Export Veteran Report" button seen in **Figure 10**. This will allow the user to download the report into an Excel document.

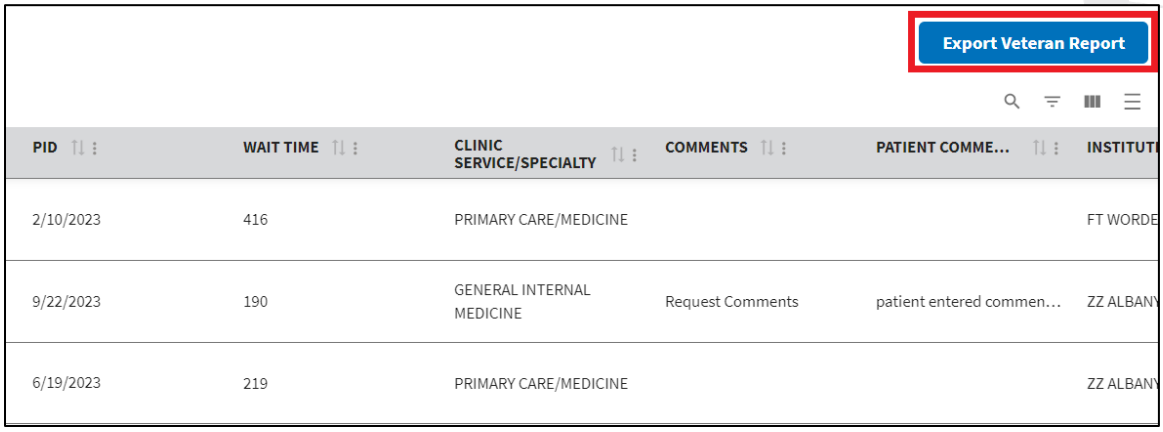


Figure 10: Export Veteran Report Button

2.1.3 Additional Links

The user can locate links at the bottom of the ISS page within the "Getting Started with ISS" and "Help" sections for additional information. Links may vary depending on user and location. See **Figure 11** below for reference.

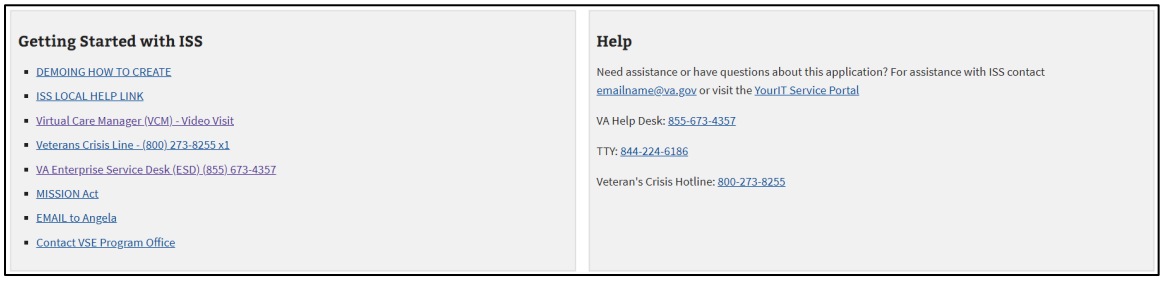


Figure 11: Example of Additional Links for ISS

2.2 My Account

2.2.1 User Preferences

1. To change user preferences, the user can select the "My Account" button in the upper right-hand corner, seen in **Figure 12**, to open the dropdown.

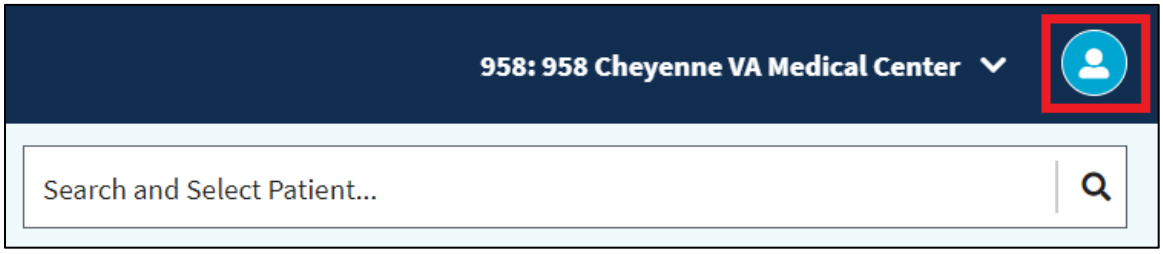


Figure 12: Selecting My Account Icon when Changing Preferences

2. The user can then select the “Preferences” button, seen in **Figure 13**, to be taken to the User Preferences page.

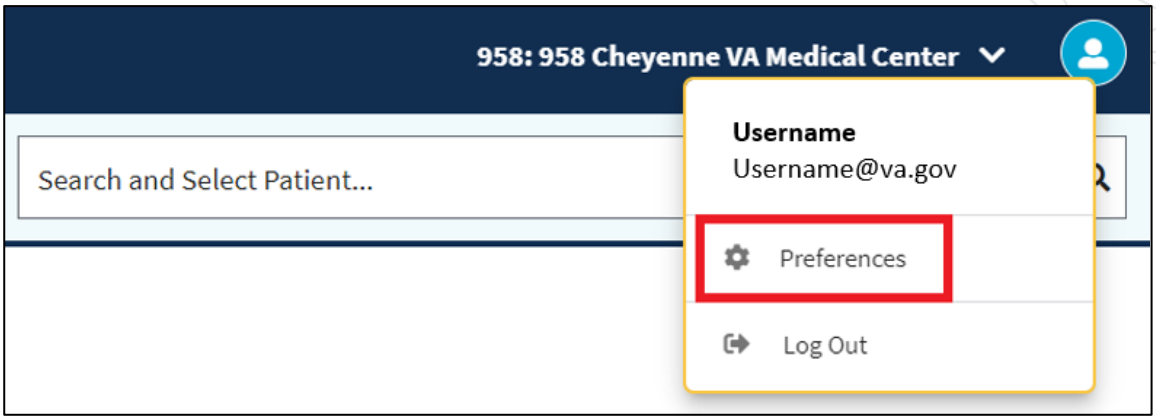


Figure 13: Preferences Button

3. To adjust the default order of Pending Appointments and Appointment Requests, drag and drop the different selections as seen in **Figure 14** below.

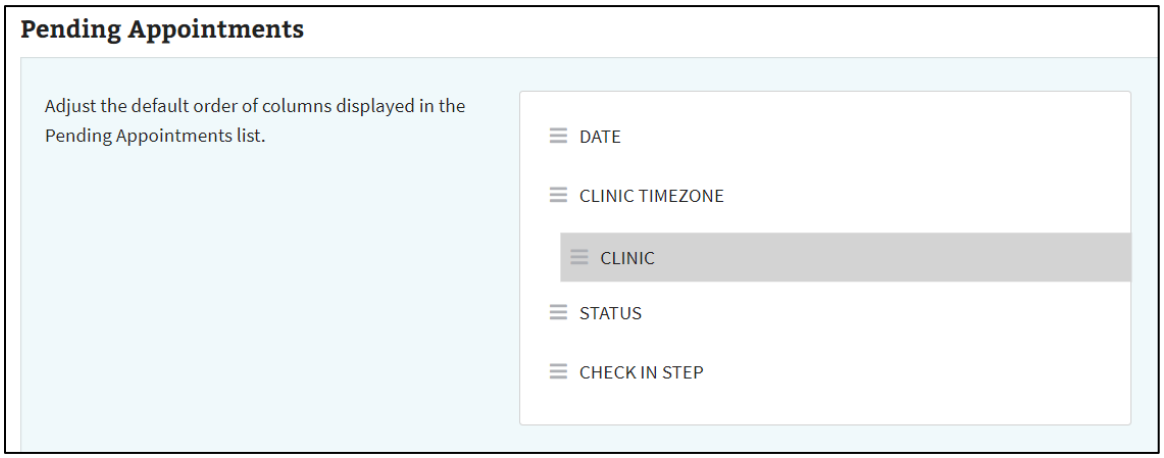


Figure 14: Adjusting Pending Appointments and Appointment Request Column Order from Preferences

4. The user can then select the “Save” button seen in **Figure 15** to save their changes.



Figure 15: Save Button for Appointments and Requests Column Order

5. To change the default calendar view for Clinic Schedule, select the arrow shown in **Figure 16**.

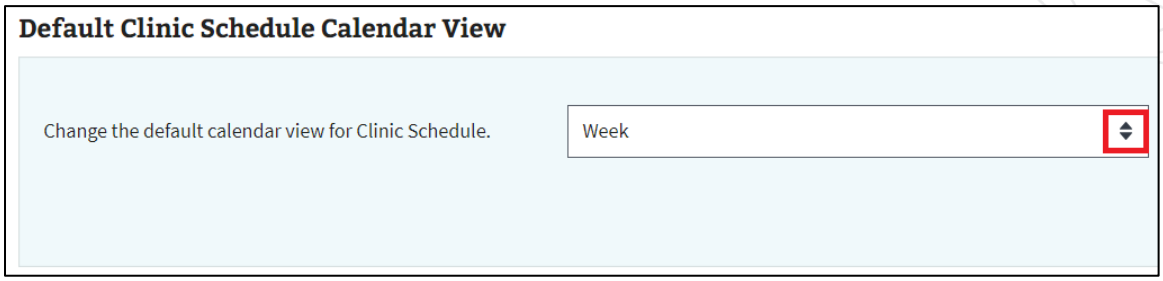


Figure 16: Dropdown Arrow for Changing Default Calendar View

6. Once the dropdown displays, the user can select their preferred view option from the list seen below in **Figure 17**.

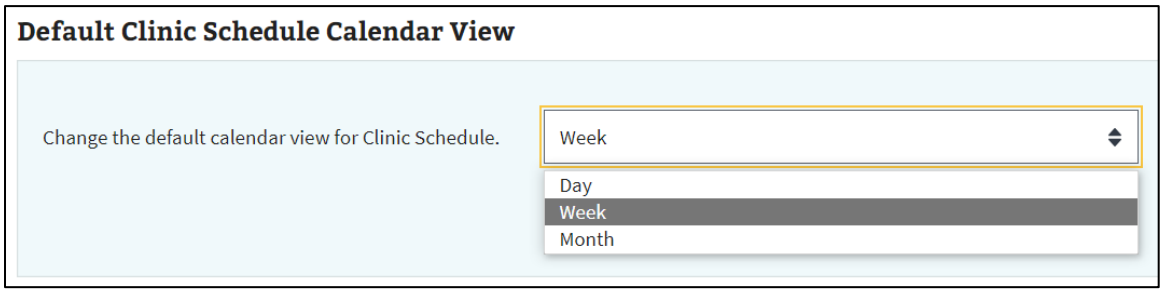


Figure 17: Dropdown View of Calendar View Selections

7. The user can then select the "Save" button seen in **Figure 18** to save their changes.



Figure 18: Save Button for Calendar View Preference

8. To reset preferences, select the "Reset to Default" button within the individual sections as seen in **Figure 19**.



Figure 19: Reset to Default Button for Preferences

2.2.2 Logging Out of ISS

1. To log out of ISS, the user will need to select the "My Account" button in the upper right-hand corner, as seen in **Figure 20**, to open the dropdown.

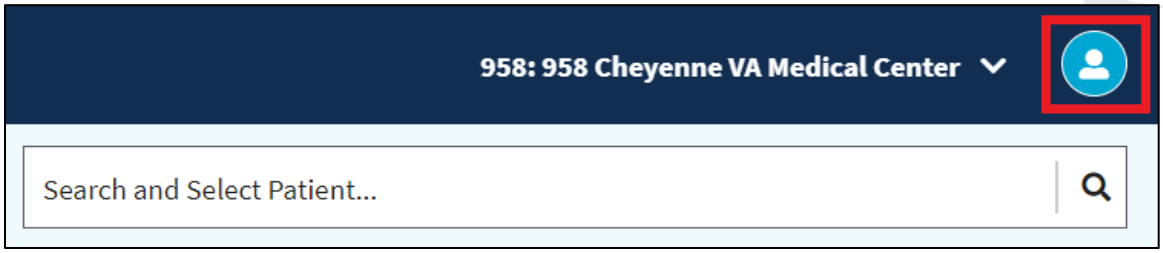


Figure 20: Selecting My Account Icon when Logging Out

2. The user will then select the "Log out" button shown below in **Figure 21**.

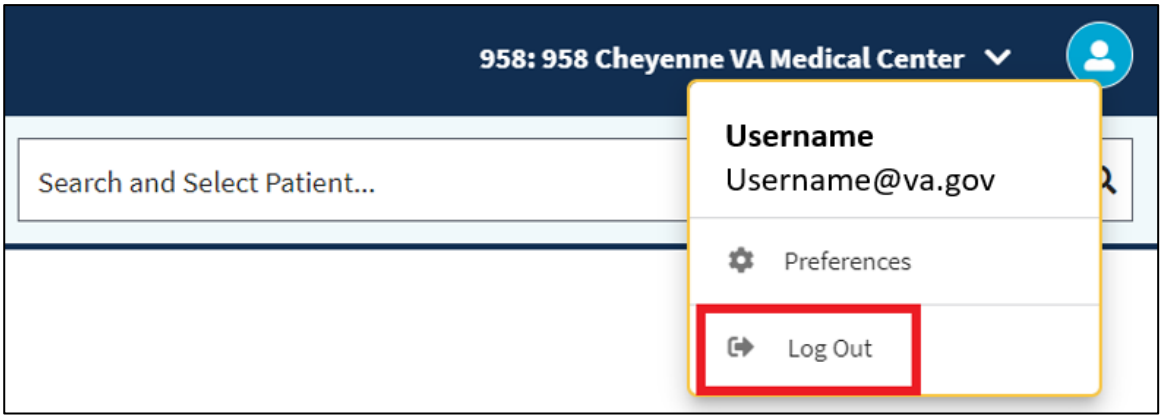


Figure 21: Log Out Button from My Account Dropdown

3. Upon logging out of the ISS application, the user will be taken to the page seen in **Figure 22** that will prompt them to log out of the VA SSOi and close the browser.

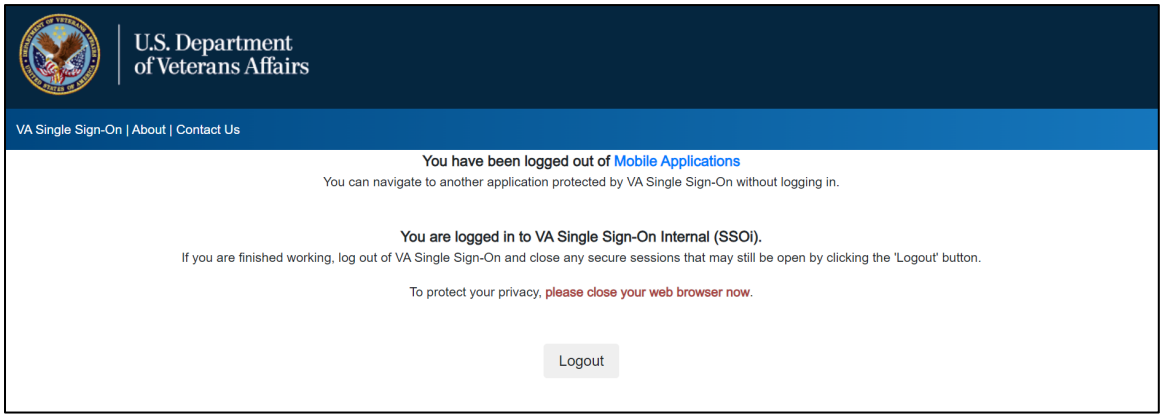


Figure 22: Logged Out of Mobile Applications Page

- *Note: If you are logged in but not actively using ISS, the user will automatically be logged out after 15 minutes (see **Figure 23** for reference).*

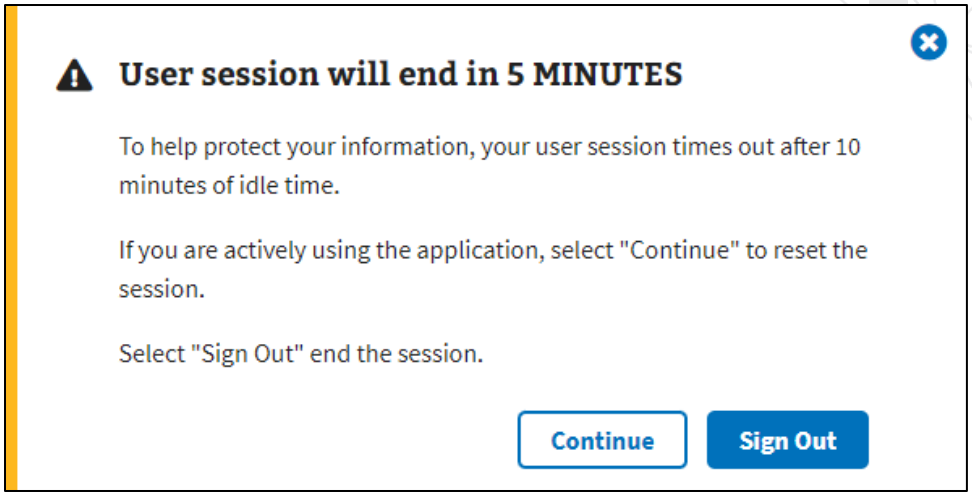


Figure 23: User Session is Ending Notification

2.3 Filters

2.3.1 Column Order

1. When looking for availability within the grid, the user can rearrange the column order. To begin, the user will need to select the "Move" button pictured in **Figure 24** to grab the column.

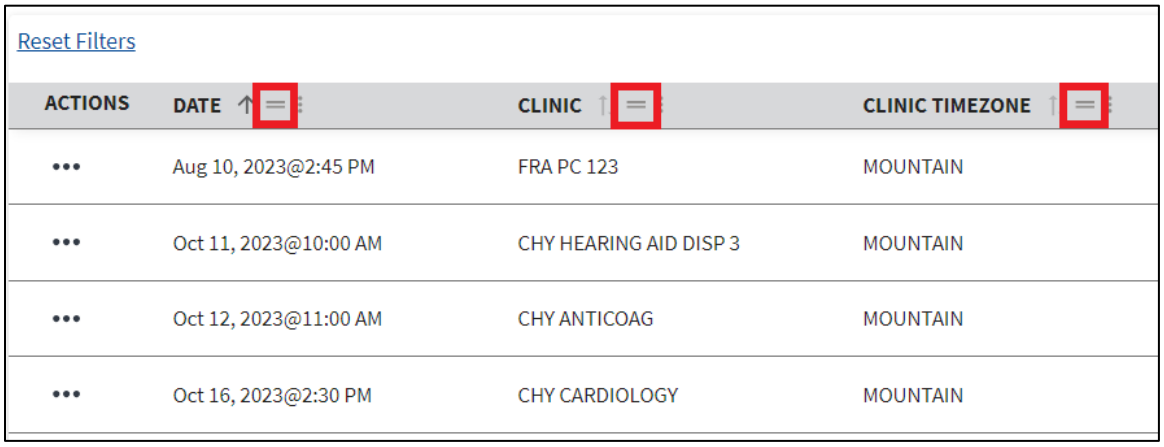


Figure 24: Move Button from Grid View

2. The user can then move the column to a different spot by dragging the column and dropping it in the desired spot seen in **Figure 25**.

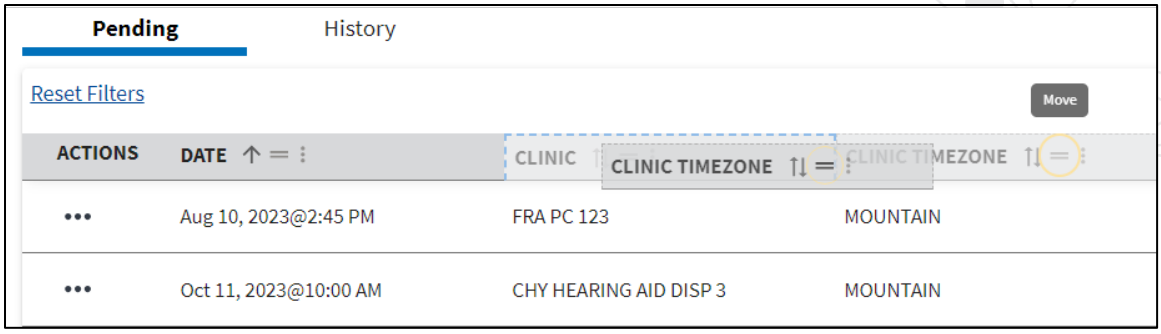


Figure 25: Example of Changing Column Order from Grid View

3. Optionally, the three vertical bars pictured in **Figure 26** titled “Show/Hide Columns” can be used to rearrange and reset the column order.

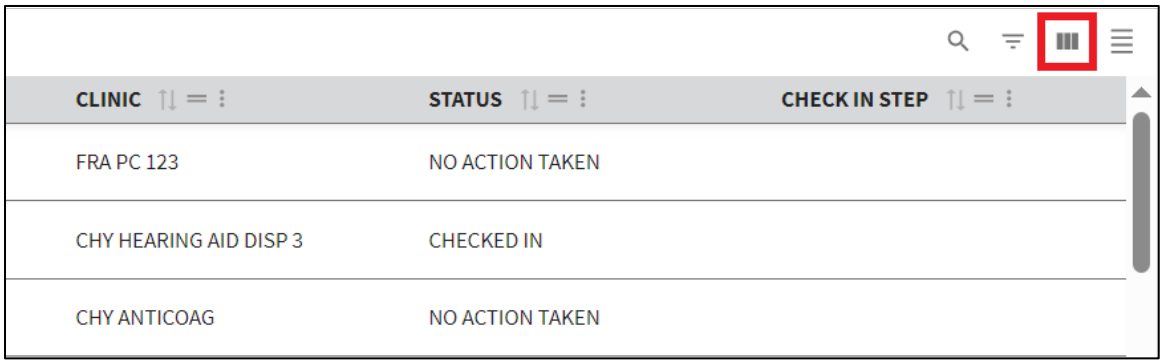


Figure 26: Show/Hide Columns Button for Moving Columns

4. After selecting the button in **Figure 27**, the user will need to select the “Move” button, seen in figure x, next to the desired column.

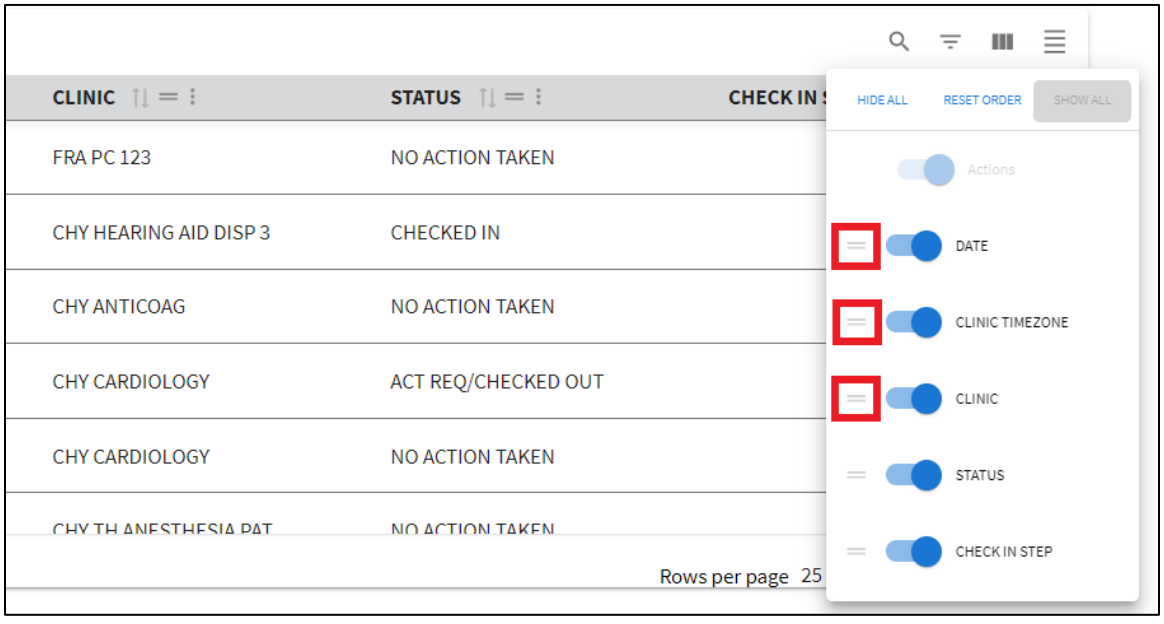


Figure 27: Move Button from Show/Hide Columns Dropdown

5. The user will then be able to drag and drop the column as seen in **Figure 28** with the dotted blue line.

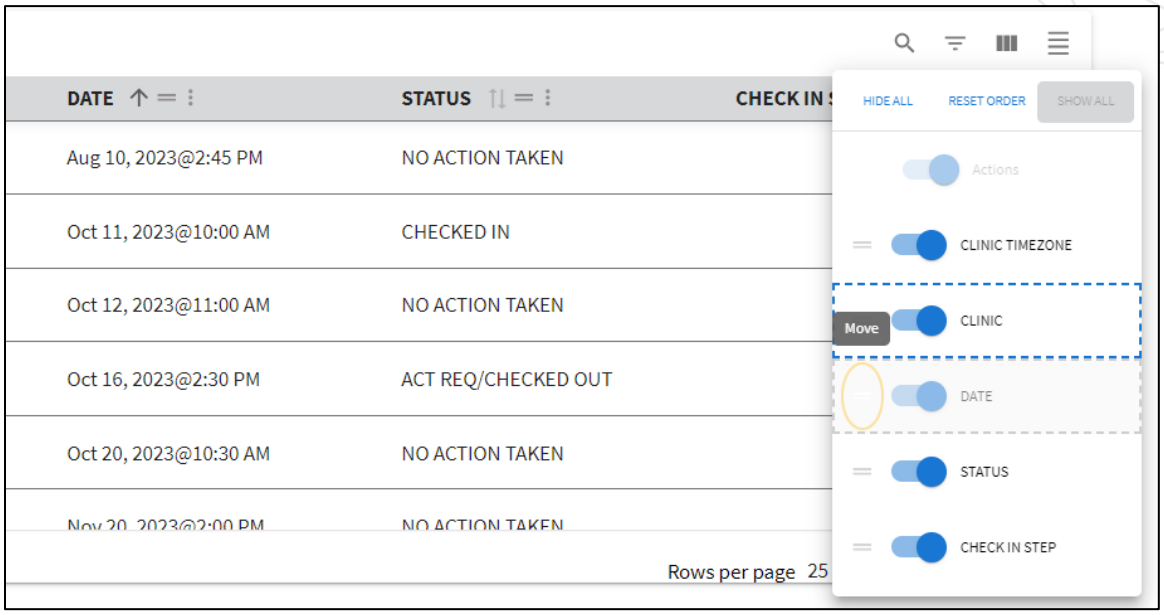


Figure 28: Example of Changing Column Order from Show/Hide Columns Dropdown

6. To reset the order of the columns to default, the user can select the "Reset Order" button shown in **Figure 29**.

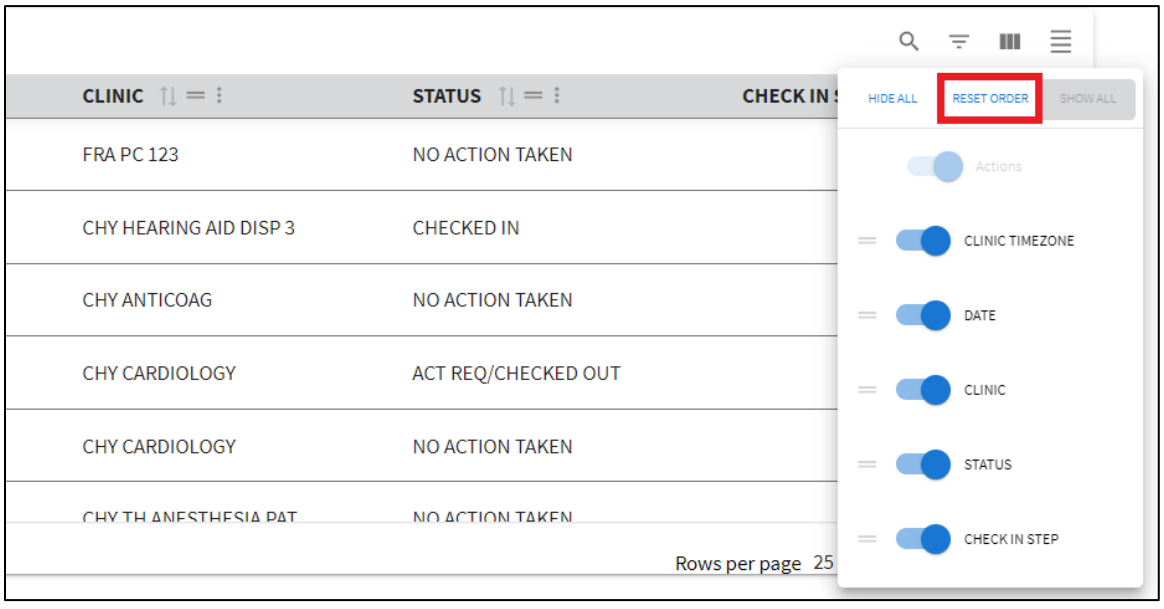


Figure 29: Reset Order Button on Show/Hide Columns Dropdown

2.3.2 Sort by Ascending and Descending

1. When looking for availability within the grid, the user can sort rows within the table. To begin, the user will need to select the vertical ellipsis next to the desired column, as seen below in **Figure 30**.

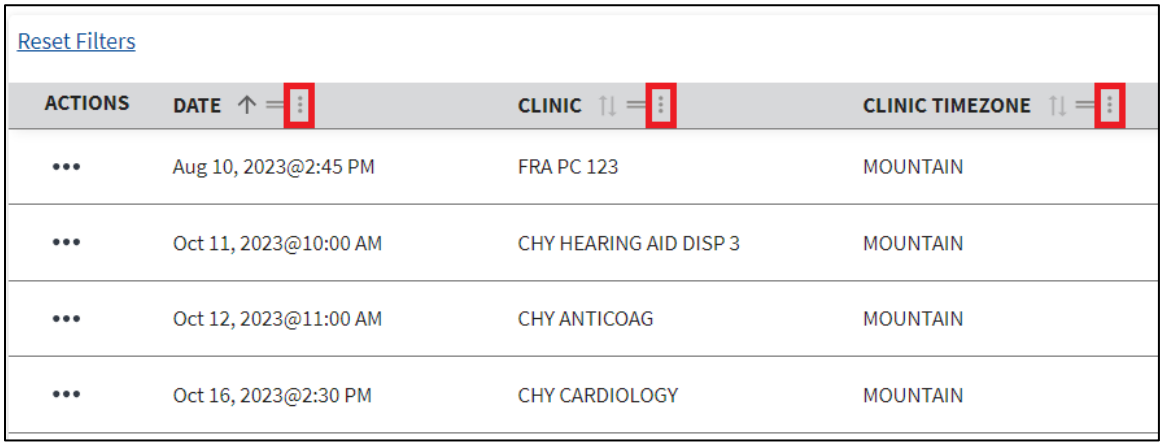


Figure 30: Selecting Column Actions Button to Sort Order

2. The user can then select either “Sort by (Column Name) Ascending” or “Sort by (Column Name) descending” to sort rows in an ascending or descending order within the table, outlined within **Figure 31**.

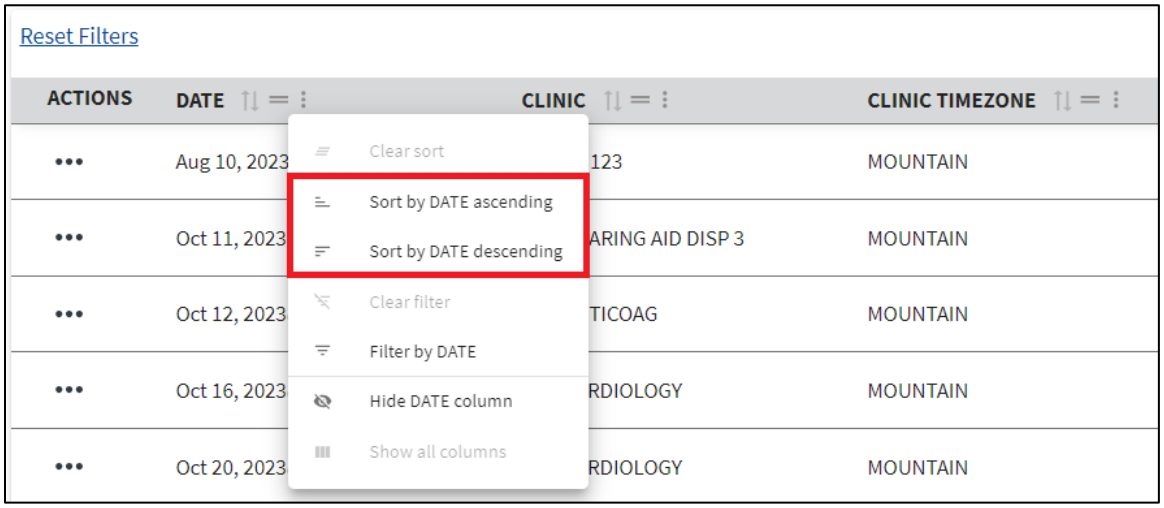


Figure 31: Sort Options for Table Information

3. To return the sorting to default, the user will need to select the vertical ellipsis seen in figure x, then select the “Clear Sort” button shown in **Figure 32**.

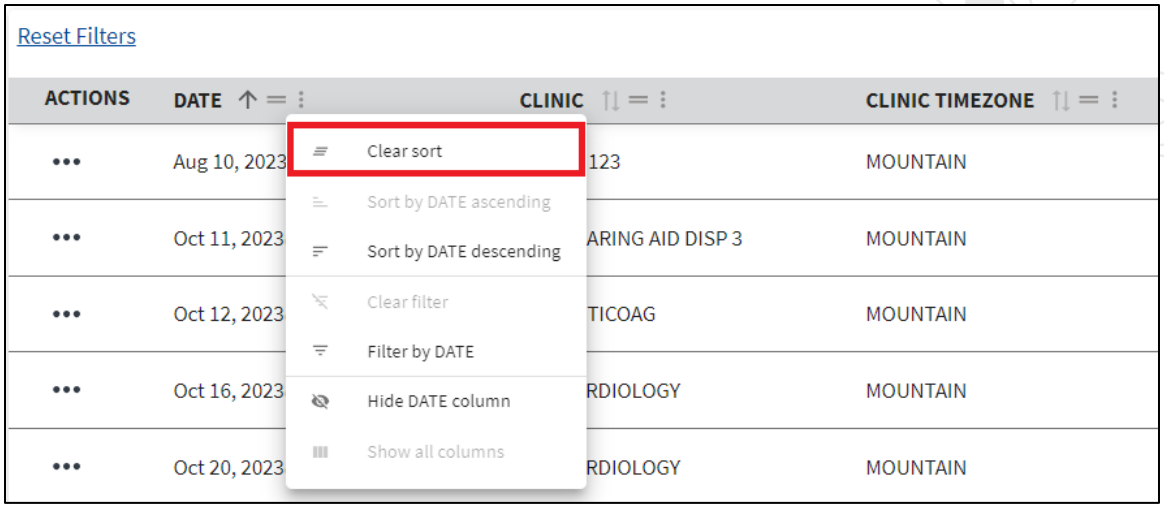


Figure 32: Clear Sort Button

4. Optionally, the user can sort rows by hovering the cursor next to a column's name and selecting the arrow button that appears in **Figure 33**.

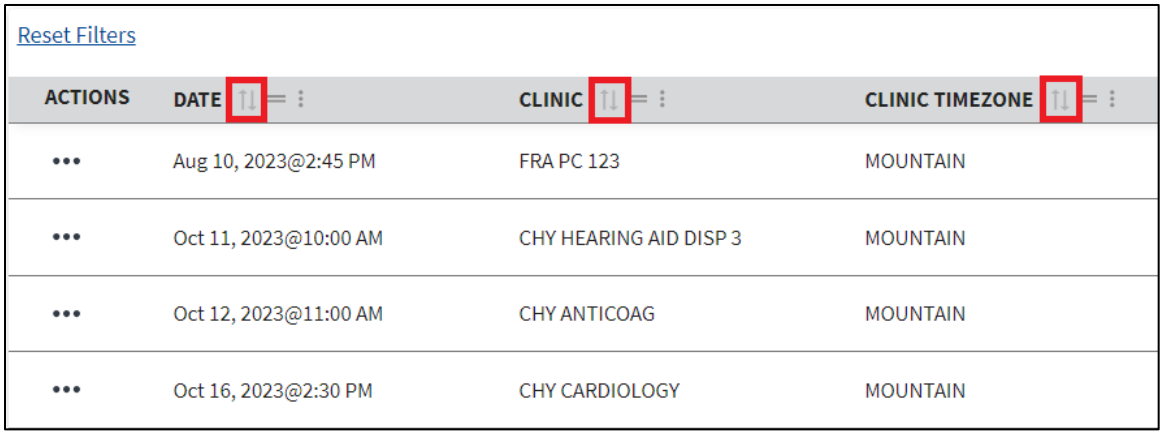


Figure 33: Sort Order Button

5. 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).

2.3.3 Toggle Density

1. When looking for availability within the grid, the option to adjust the toggle density is available. To begin adjusting the toggle density, select the button shown in **Figure 34**.

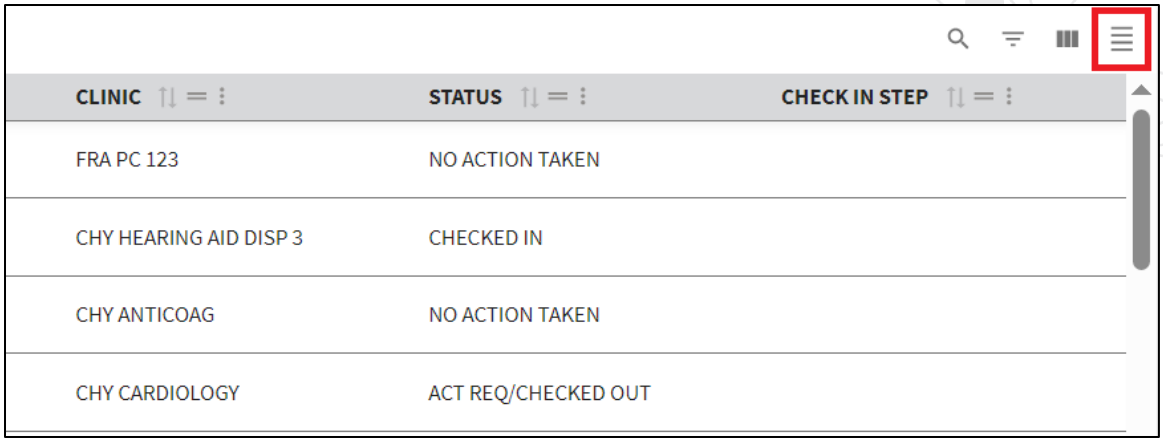


Figure 34: Toggle Density Button

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.

2.3.4 Show, Hide, and Search Filters

1. 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, or the "Filter by (Column Name)"button, both shown in **Figure 35**. Selecting either will cause the search functions to appear under each column name.

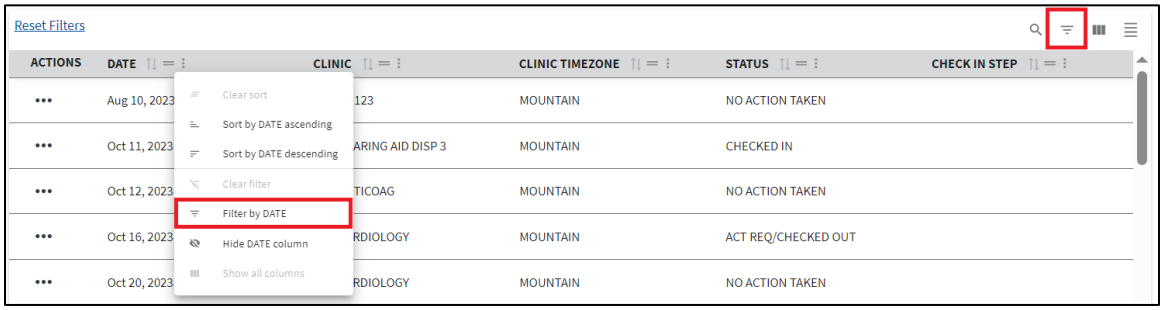


Figure 35: Show/Hide Filter Options Buttons

2. Once the search options appear as seen in **Figure 36**, 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.

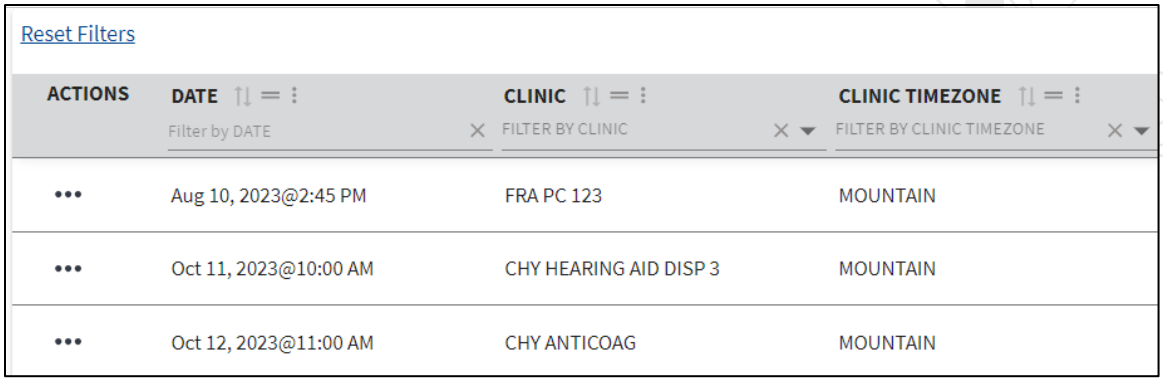


Figure 36: Example of Filter Search Menu on Grid View

3. Once the filter field has been populated, results will automatically refresh and show items based on the filtered criteria as seen below in **Figure 37**.

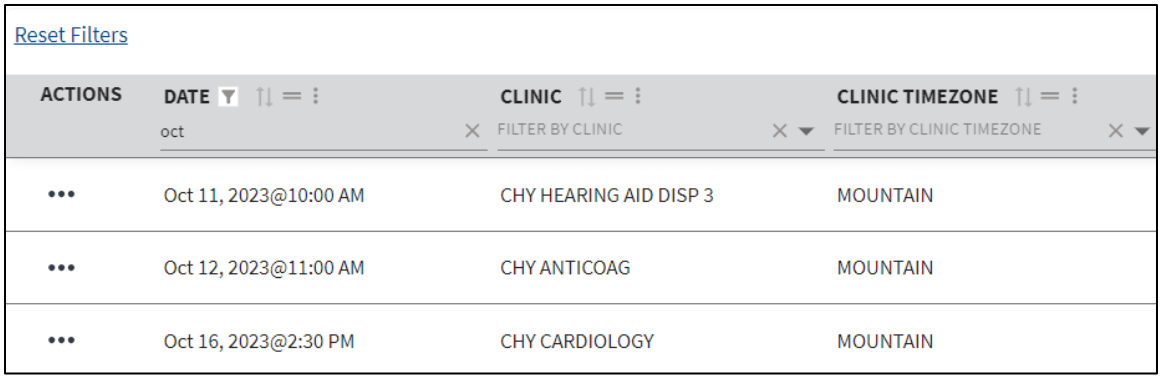


Figure 37: Example of Filtered Results in Grid View

4. To clear the search, the user will need to select the "X" next to the search bar seen in **Figure 38**. Selecting this will cause all results to appear within the table.

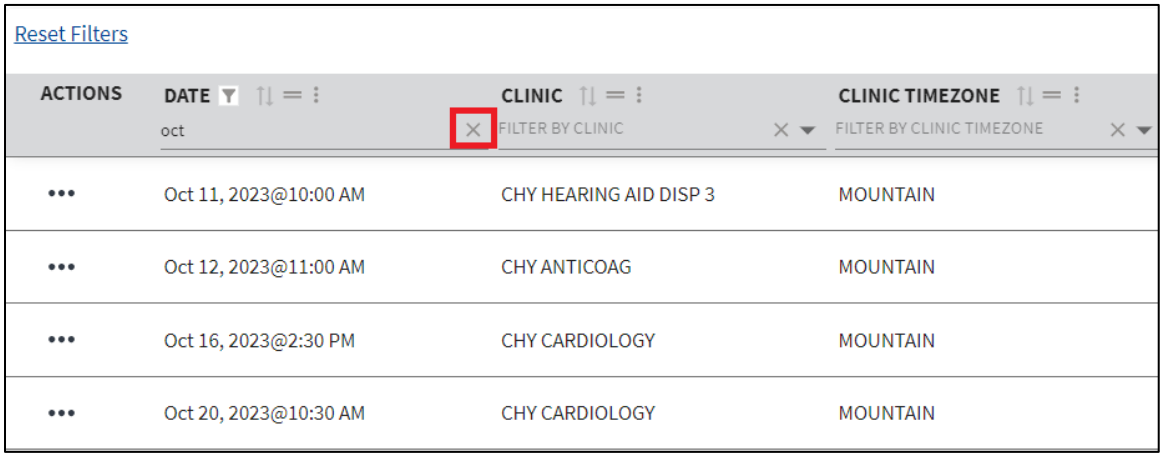


Figure 38: Clearing Filter Button

5. Once finished searching, the user can then select the "Show/Hide Search" button seen in **Figure 39** to hide the search bar.

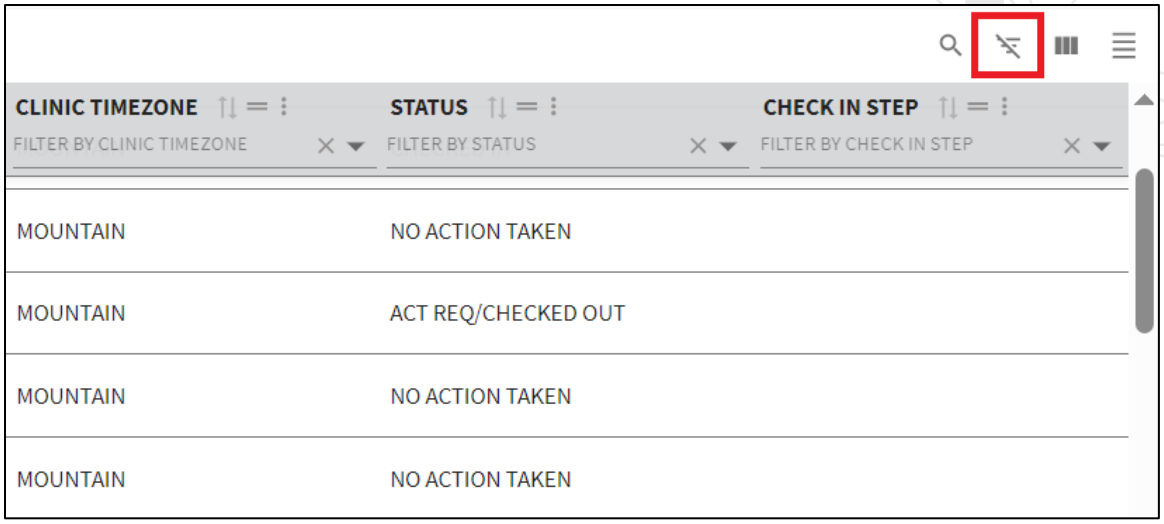


Figure 39: Selecting Show/Hide Filters Button to Hide Filter Menu

2.3.5 Filtering Rows

1. Users can increase or decrease the number of rows shown on the page by selecting the arrow shown in **Figure 40**.

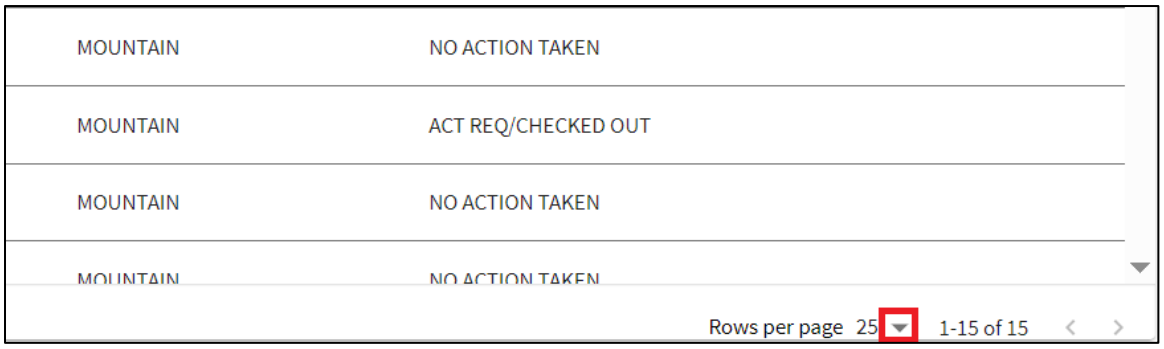


Figure 40: Arrow Button for Changing Row Number

2. Users can also navigate the table to more available timeslots by selecting the arrows, shown in **Figure 41** from left to right as follows; "|<" to jump to the first page, "<" to navigate one page backwards, ">" to navigate one page forwards, and ">|" to jump to the last page.

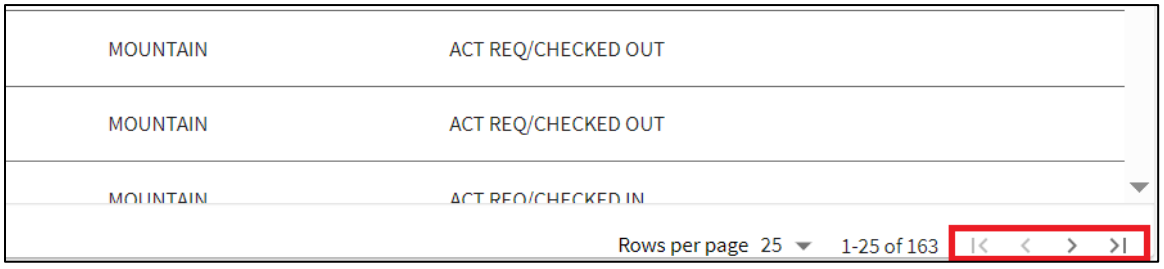


Figure 41: Buttons for Navigating Result Pages on Grid View

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

2.3.6 Reset Filters

To reset any filters that are set on either the "Appointments" or "Appointment Requests" grids, the user can select the "Reset Filters" button, as seen in **Figure 42**.

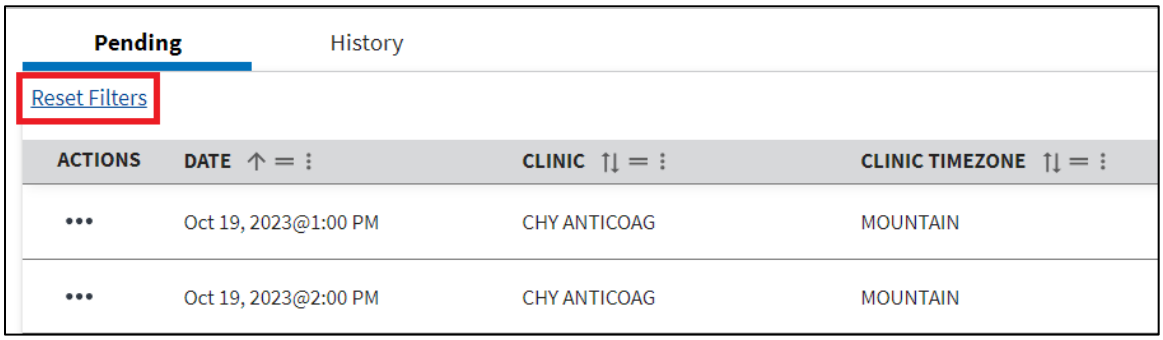


Figure 42: Reset Filters Button on Grid View

2.3.7 Refresh Table

To refresh the table for either the "Appointments" or "Appointment Requests" grids, the user can select the "Refresh Table" button, as seen in **Figure 43**.

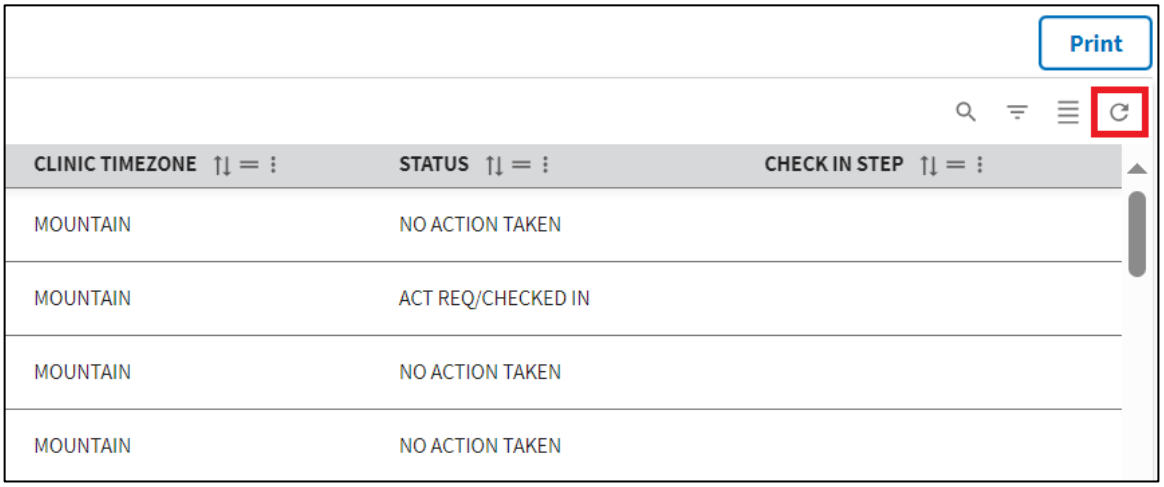


Figure 43: Refresh Table Button

2.3.8 Filtering & Navigating on Calendar

1. To navigate through the calendar, the user can use the arrows shown in **Figure 44**.

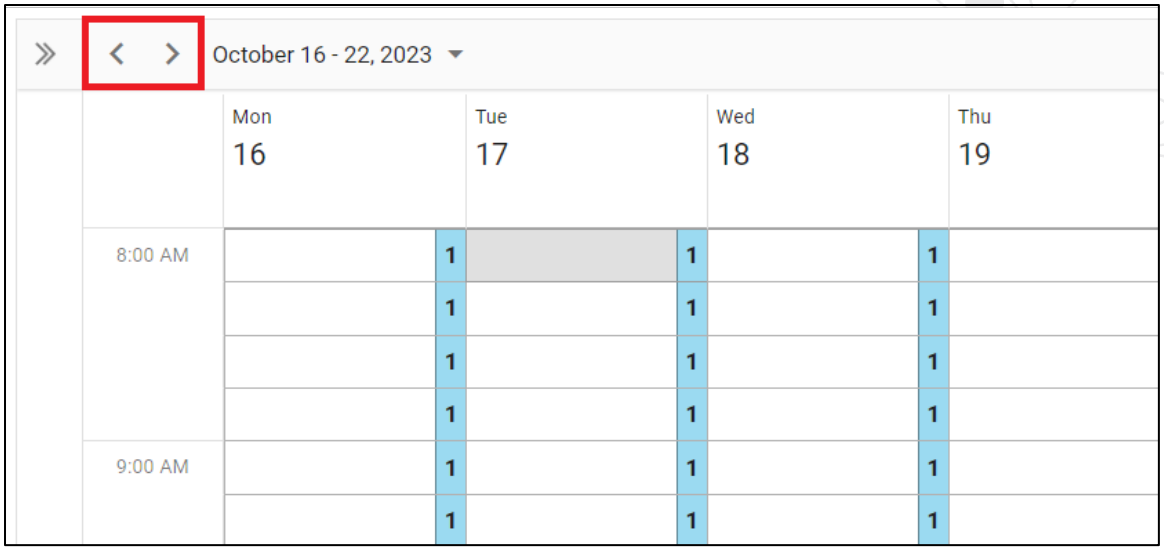


Figure 44: Arrow Buttons on Calendar to Change Dates

2. Optionally, the user can choose a specified date, as highlighted in **Figure 45**, by selecting the arrow to the right of the date.

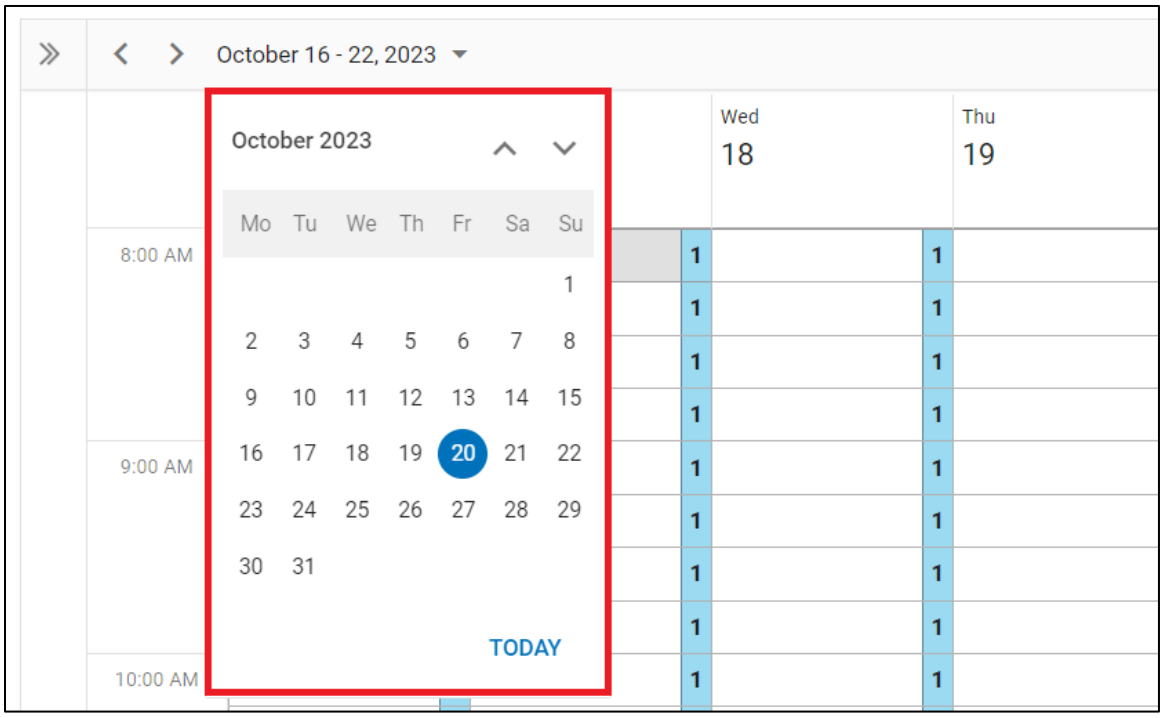


Figure 45: Mini Calendar on Calendar View to Choose Specific Date

3. Users can also choose to view the calendar in Day, Week, or Month mode by selecting the associated button shown below in **Figure 46**.

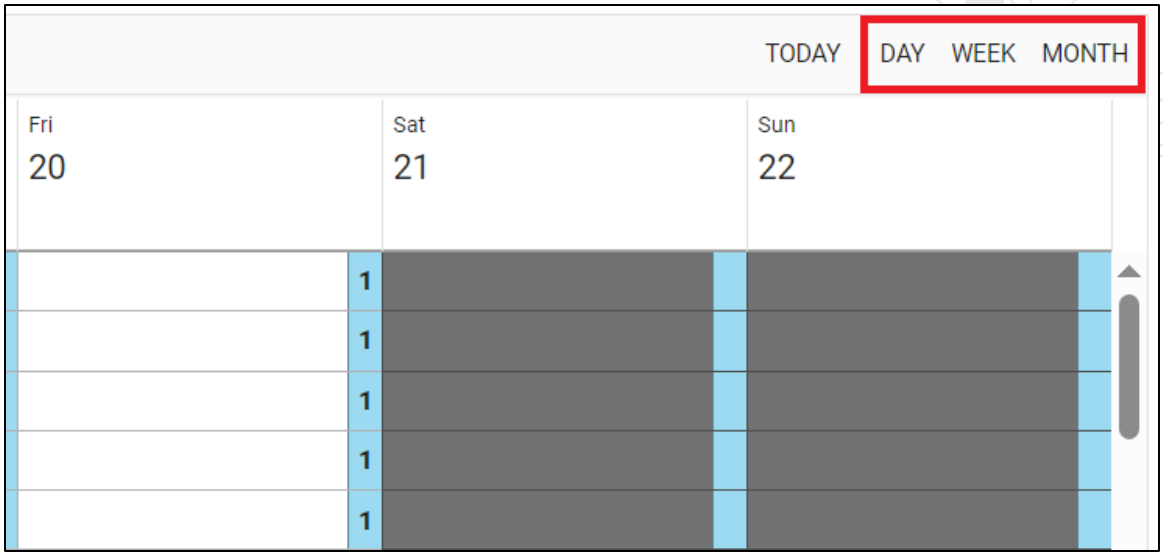


Figure 46: Changing Default Calendar View from Calendar

4. The user can also select the "Today" button, seen in **Figure 47**, at any point to bring the calendar back to the current date.

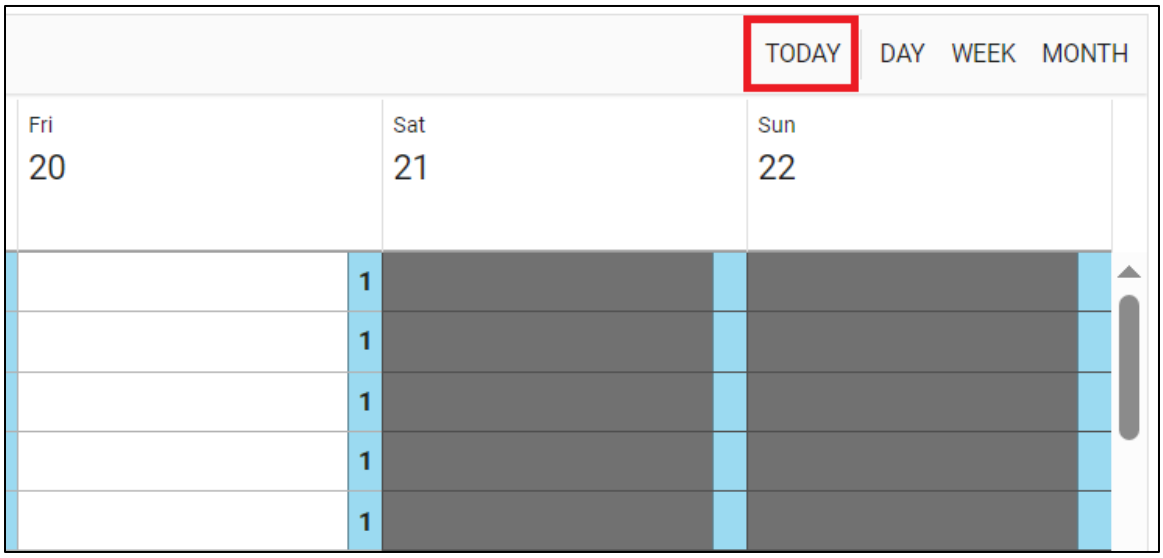


Figure 47: Bringing Calendar Back to Current Date on Calendar View

2.3.9 Pending Appointments & Appointment History

Within the "Appointments" section found within **3.3 Appointments & Requests,** users can navigate between pending appointments and appointment history for a selected patient. To do so, the user can simply select the desired tab to update the appointment list with the corresponding tab. Please see **Figure 48** for a description on which appointments will appear where depending on the corresponding status.

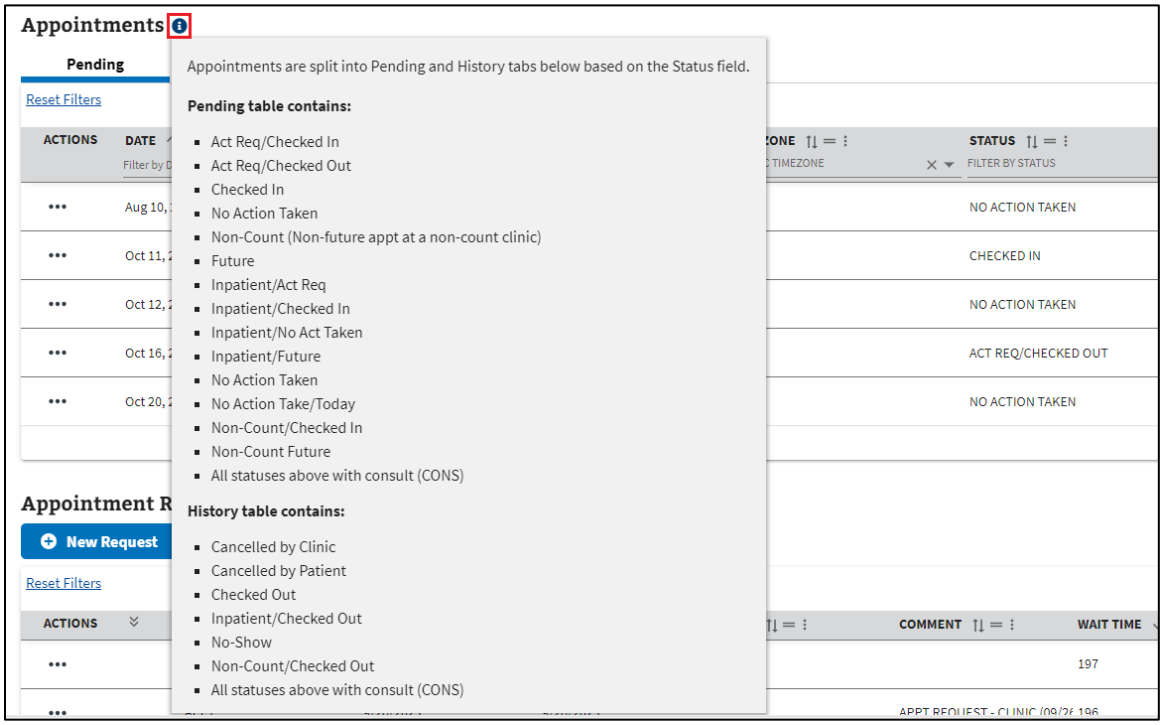


Figure 48: Information on the Pending and History Tabs for Appointments

3. Patient Overview

3.1 Patient Search

1. To search for a patient, the user will select the search bar, seen in **Figure 49**, and enter valid search criteria. Once entering the information, a list of patients will appear in a dropdown.

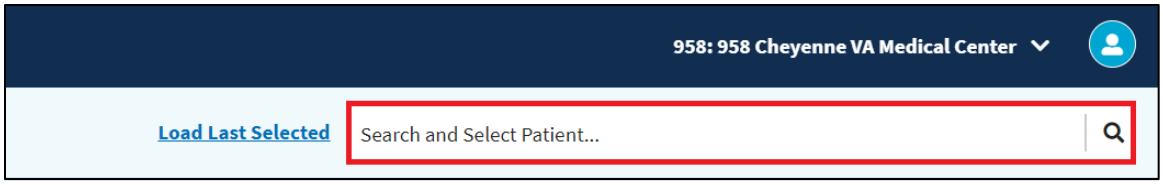


Figure 49: Patient Search Bar

- ❖ *Note: See **Figure 50** below for a list of valid search criteria for patient search.*

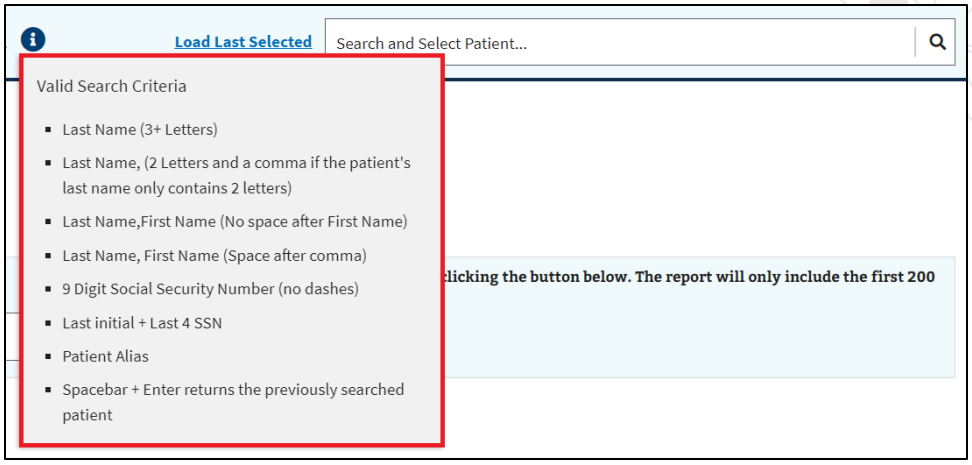


Figure 50: Valid Search Criteria for Patient Search

2. The user will then select the intended patient from the available options.
3. Once a patient is selected, the user will need to read the "Patient Eligibility" window, shown in **Figure 51**, and select "Acknowledge Eligibility" to continue.

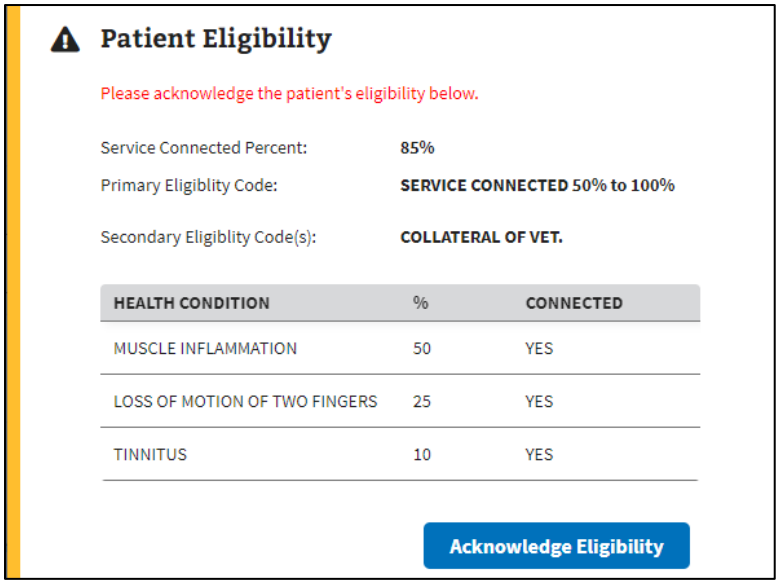


Figure 51: Patient Eligibility Notification

- ❖ *Note: The user is able to select "Expand" to see more information about the patient in context (see **3.4.1 Demographics Banner** for more information).*

4. To view information or interact with the patient, the user will need to select the "Patient" tab seen in **Figure 52**.

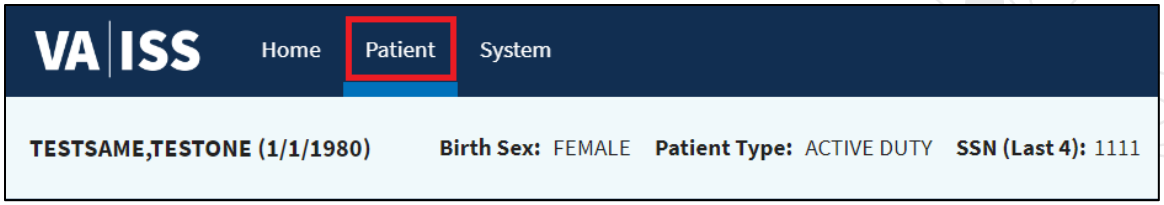


Figure 52: Patient Tab from the Home Screen

5. To bring a new patient into context, the user will need to select the "Clear" button seen below in **Figure 53**. The page will automatically reload and "No Patient in Context" will be shown.



Figure 53: Clear Button for Patient Search

6. The user is then able to search for a new patient. To load the last selected patient, the user can select the "Load Last Selected" button, seen in **Figure 54**, or type "spacebar + enter" into the search bar.

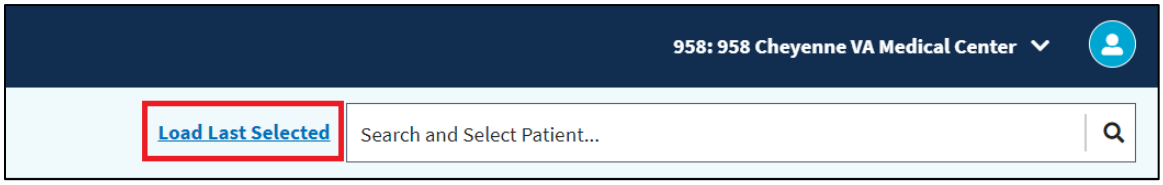


Figure 54: Load Last Selected Button for Patient Search

3.2 Patient Profile Home

The Patient Profile Page can be navigated to by selecting the "Patient Profile Home" tab shown in **Figure 55**. This page gives a brief overview of the patient's information.

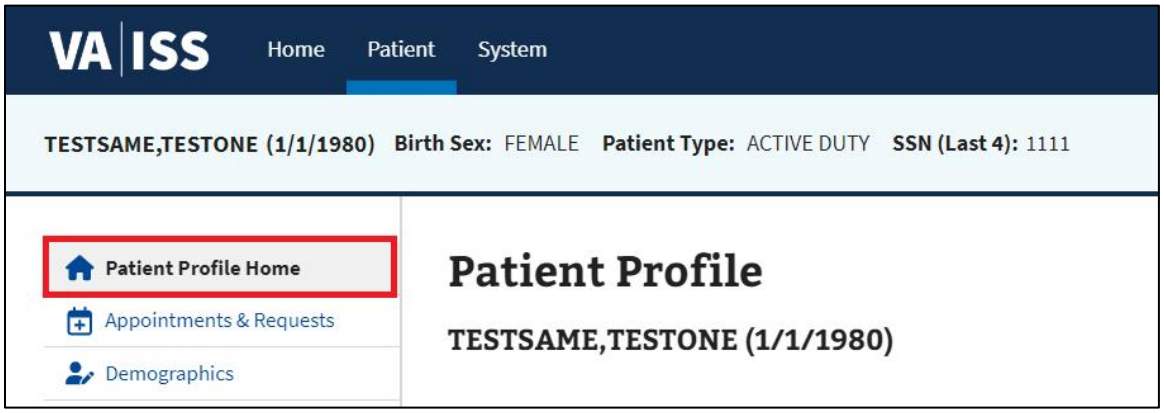


Figure 55: Example of Patient Profile Home Tab

3.3 Appointments & Requests

The Appointments & Requests Page can be navigated to by selecting the "Appointments & Requests" tab shown in **Figure 56**. The user can use this page to view and schedule appointments and requests. For more information on how to do this please visit **Patient Appointments and Requests**.



Figure 56: Example of Appointments & Requests Tab

3.4 Demographics

1. The Demographics Page can be navigated to by selecting the "Demographics" tab shown in **Figure 57**.

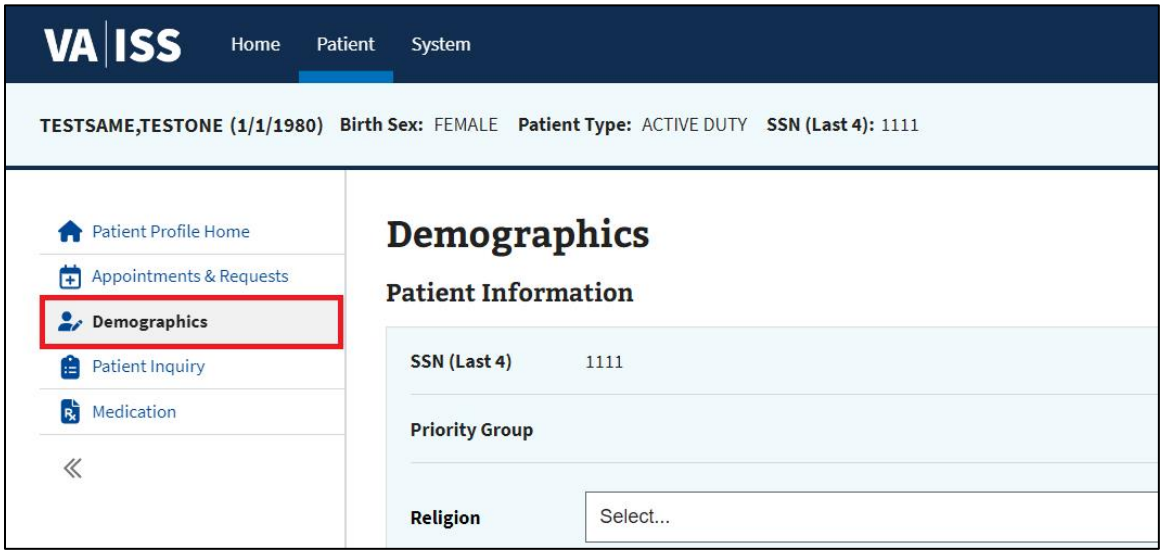


Figure 57: Demographics Tab

2. Users can edit the fields that appear within the Demographics page as shown in **Figure 58** below.

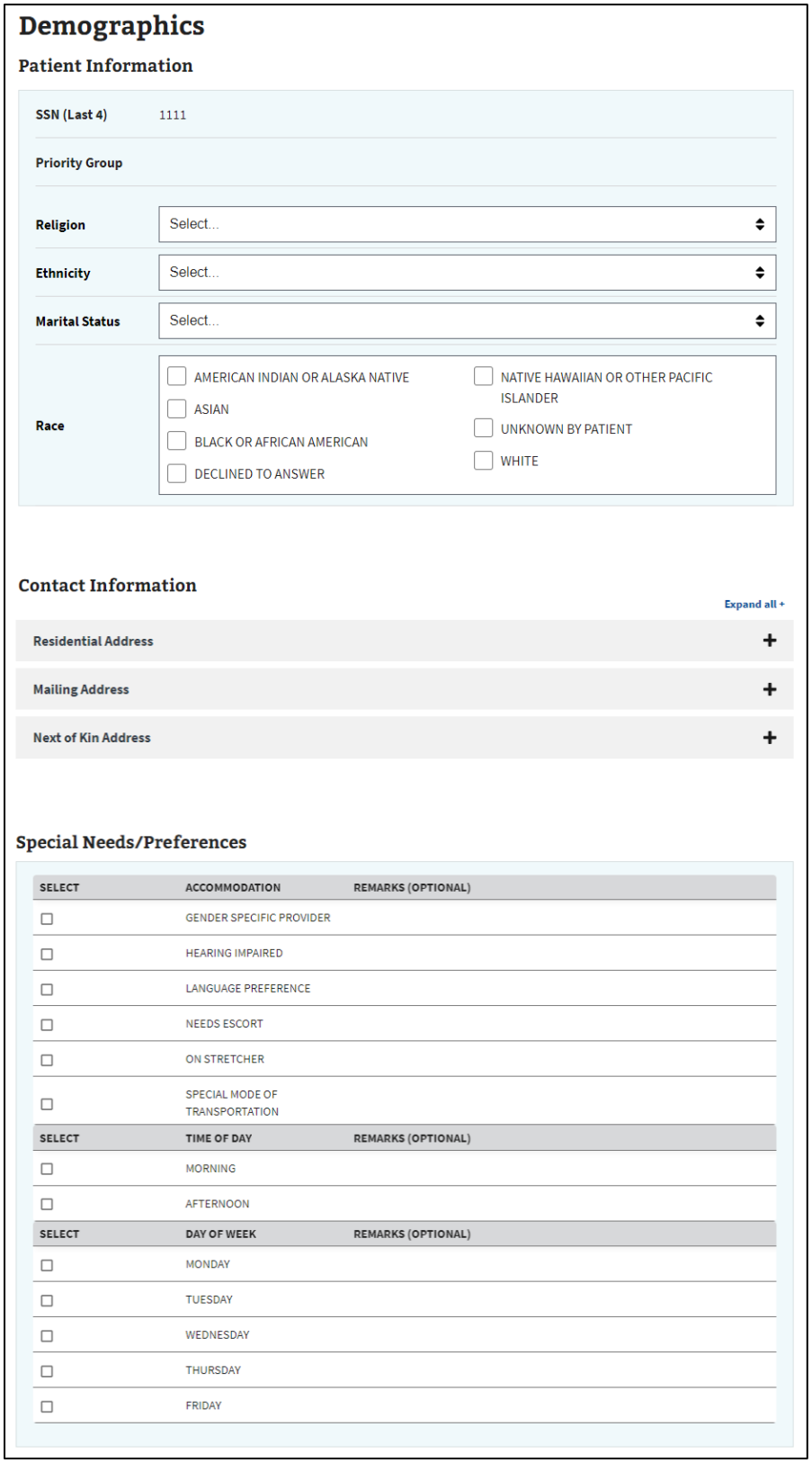


Figure 58: Example of the Demographics Page

- *Note: The user can edit the fields under "Contact Information" by either selecting the "+" button next to an individual row, or by selecting "Expand all +.*
- *Note: When editing Special Needs and Preferences, the user can add remarks to any of the individual options seen below in **Figure 59**. To leave a remark, the user will first need to select an option in the special needs/preferences section. Once selected, the Remarks field will become available to edit.*

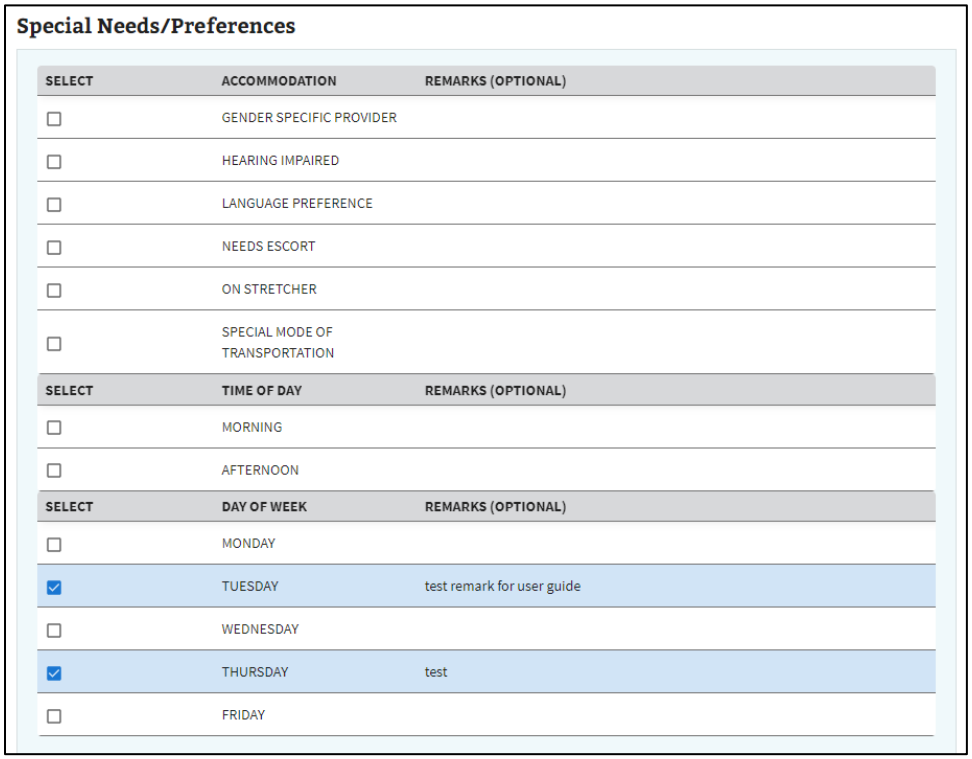


Figure 59: Special Needs/Preferences Options

3. Once the user has made their preferred edits to the patient's demographics, the user will need to select "Save Changes", as seen in **Figure 60**, to save any changes made.

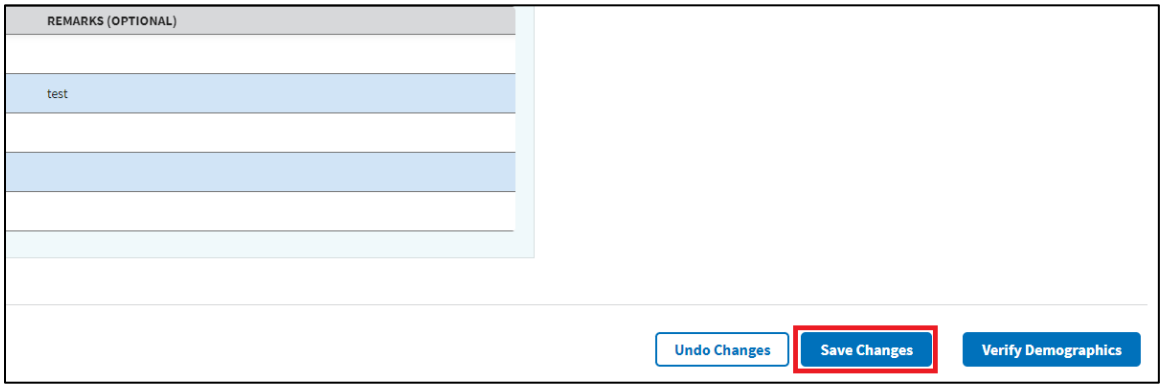


Figure 60: Save Changes Button for the Demographics Page

❖ *Note: The user can verify the patient's demographics by selecting "Verify Demographics" seen in **Figure 61**.*

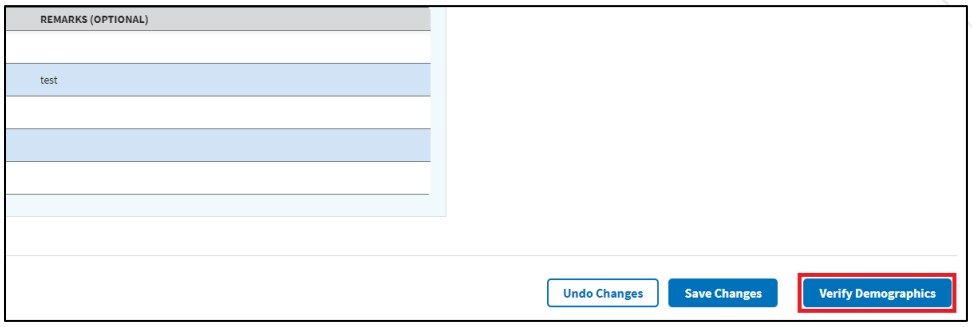


Figure 61: Verify Demographics Button

❖ *Note: If the User would like to undo any changes made within the demographics page, they can select "Undo Changes" at any time as seen in **Figure 62**.*

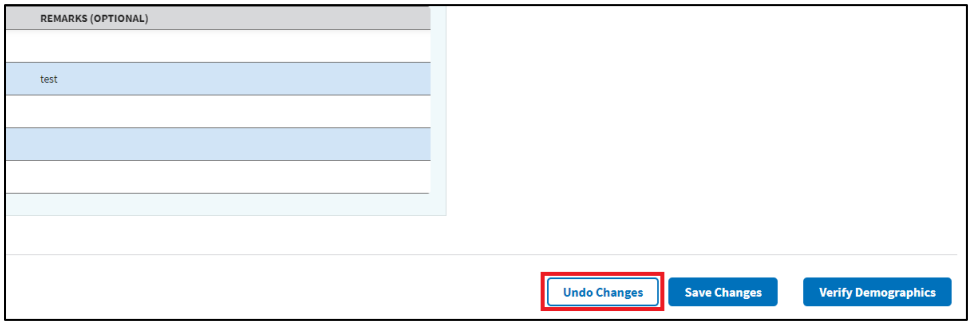


Figure 62: Undo Changes Button for Demographics Page

3.4.1 Demographics Banner

The Demographics banner is located at the top of the page and is populated with the patient's information when a patient is brought into context. Users may select the expand button, as seen in **Figure 63**, to see more information regarding the selected patient and their demographics.



Figure 63: Demographics Banner Expand Button

By default, the user will be able to see the patient's name, DOB, any patient flags (if applicable), VVC status, birth sex, patient type, and SSN (Last 4). Users can select the Special Needs/Preferences dropdown to see what is currently associated with the patient. If any edits are needed, the user can select the Demographics link, underlined in **Figure 64**, to take them to the Demographics tab (see **3.4 Demographics** for more information on editing).

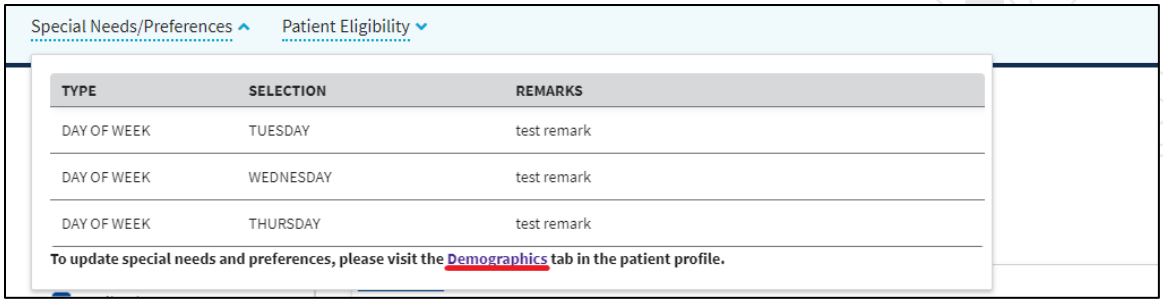


Figure 64: Demographics Link in the Special Needs/Preferences Dropdown

The user can also select the Patient Eligibility dropdown seen in **Figure 65** to view more specific information about the patient's eligibility and health conditions.

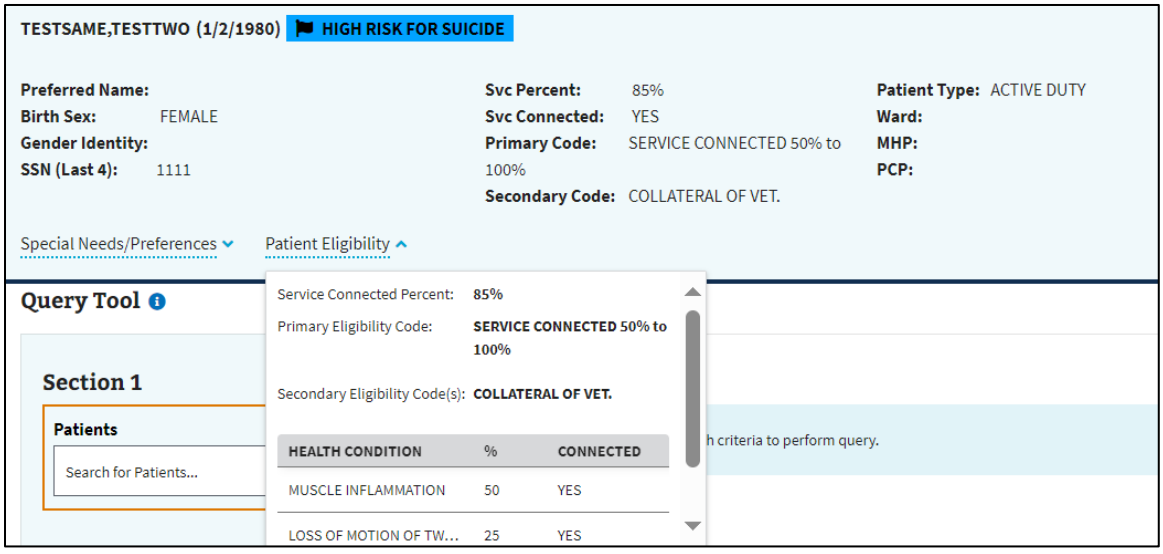


Figure 65: Patient Eligibility Dropdown

- *Note: If the patient has joined at least 3 video visit appointments within the past 120 days, the VVC status will state "VVC READY" and be green (see **Figure 66**). For more information on video visits please see **4.5 Video Visits**.*

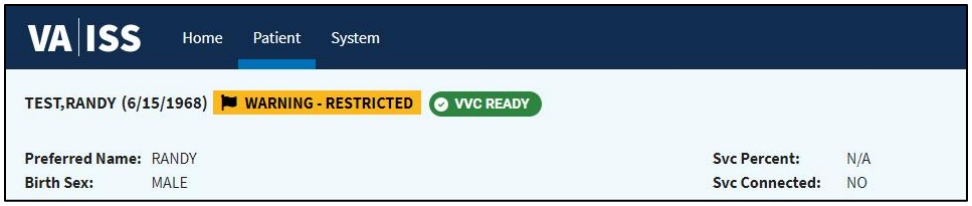


Figure 66: VVC Ready Pill

3.5 Patient Inquiry

The Patient Inquiry Page can be navigated to by selecting the “Patient Inquiry” tab shown in **Figure 67**. On this page, users can view information about the patient such as contact information, demographics, status, future appointments, etc.

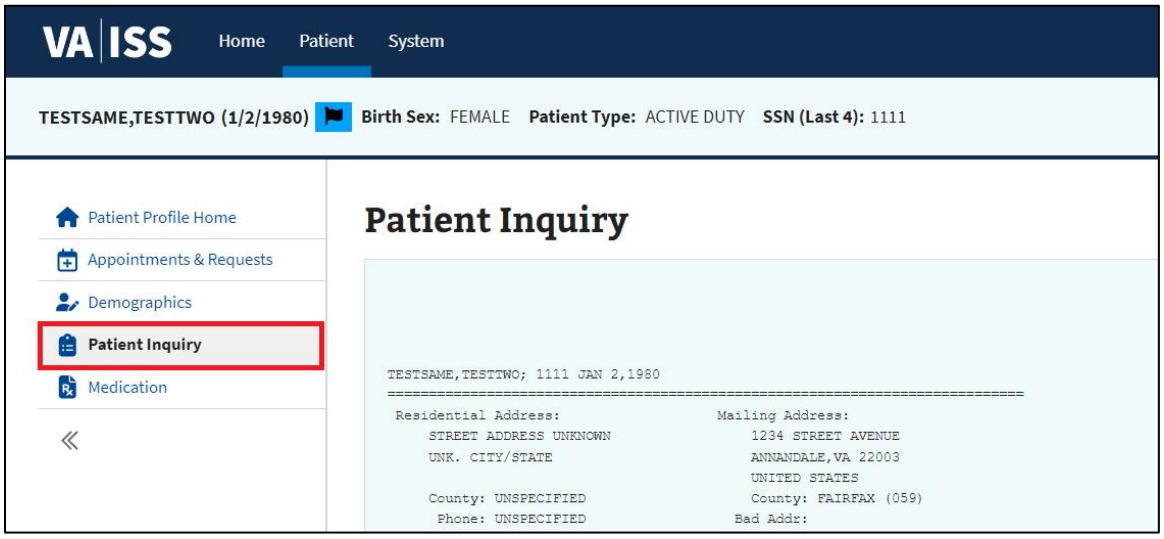


Figure 67: Example of Patient Inquiry Tab

3.6 Medication

The Medication Page can be navigated to by selecting the “Medication” tab shown in **Figure 68**. This page will list any medications the patient uses or have been prescribed.

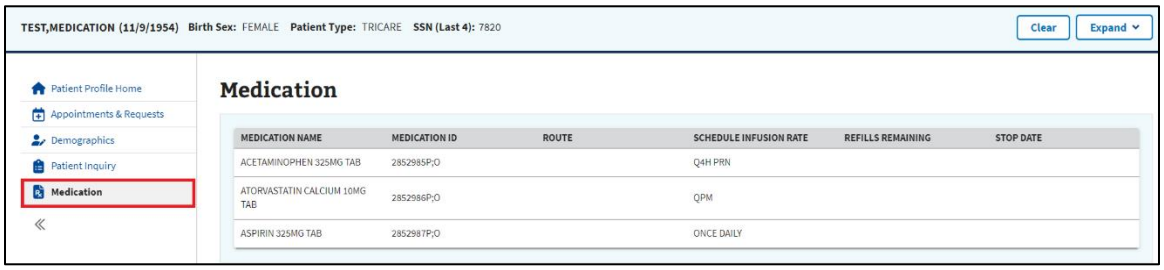


Figure 68: Example of Medication Tab

4. Patient Appointments and Requests

For all the following sections within **Patient Appointments and Requests**, the user will first need to bring a patient into context. The user can find information on how to do so by following the steps outlined in **3.1 Patient Search**.

4.1 Creating Appointment Requests

4.1.1 APPT

1. To create a new APPT request, the user will first need to select “New Request,” as shown in **Figure 69**.

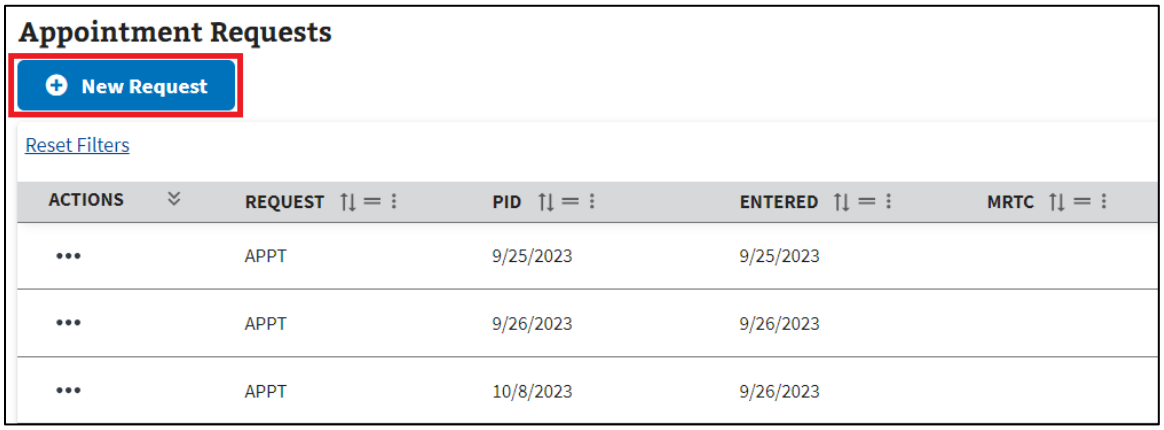


Figure 69: New Requests Button for APPT Requests

2. The user will then select “APPT” from the dropdown that appears in **Figure 70** below.

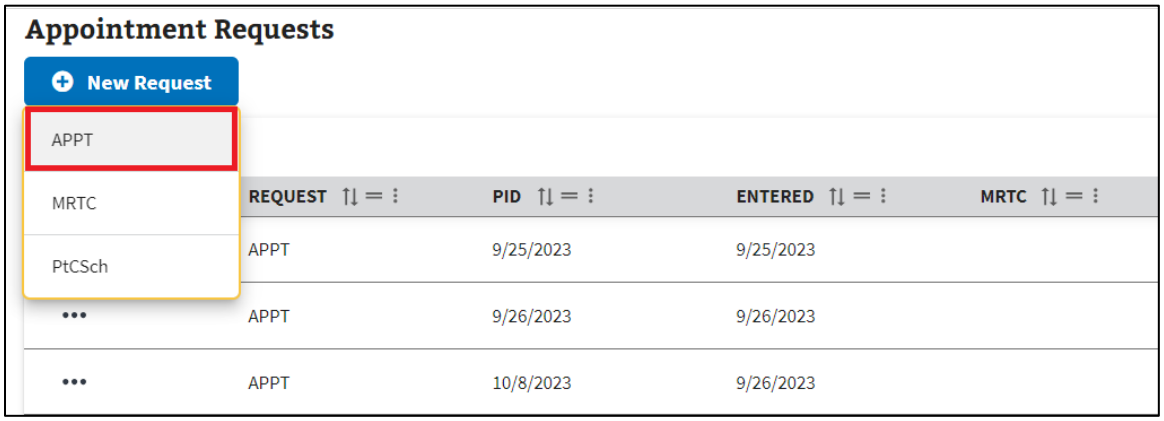


Figure 70: APPT Option from the New Request Dropdown

3. The user will be brought to the New Appointment Request page. On this page, the user will need to fill out all the required information displayed in **Figure 71**. The user can also fill out any optional information as needed.

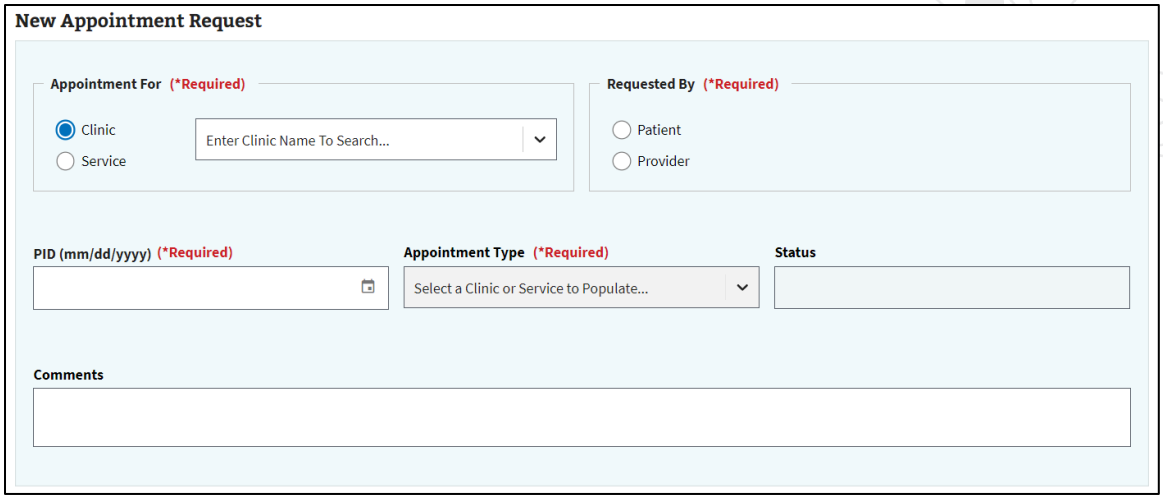


Figure 71: New Appointment Request Page for APPT

4. Once all applicable information has been filled, the user will select the "Create Request" button, seen in **Figure 72**, to create the new APPT request.

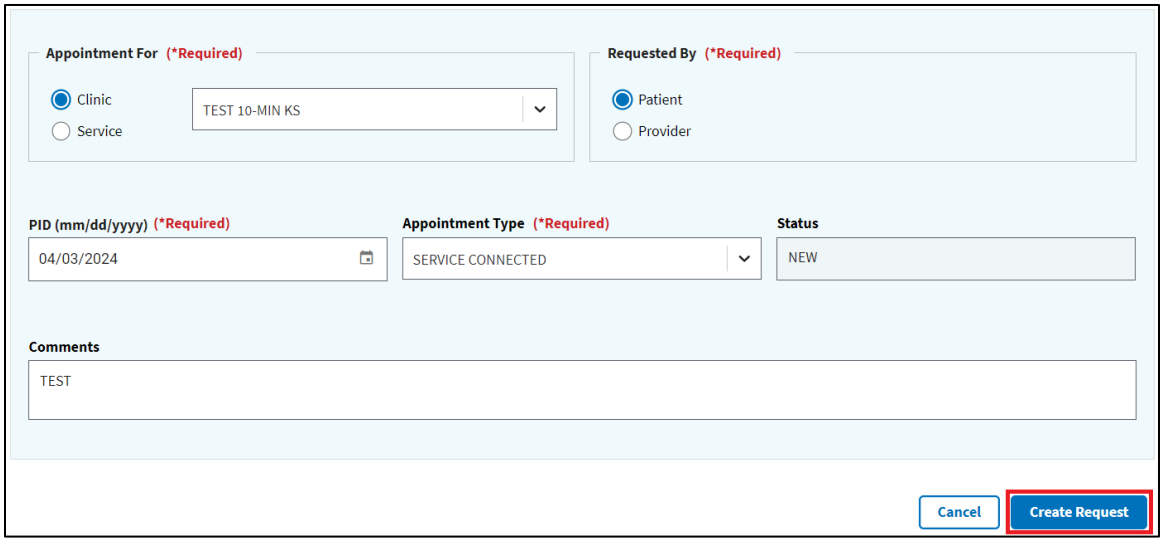


Figure 72: Create Request Button for APPT Request

- ***Note: The user can also select the "Cancel" button seen in Figure 72 to exit creating a request and go back to the Appointments & Requests page.***

4.1.2 PtCSch (Recall)

1. To create a new PtCSch request, the user will first need to select "New Request," as shown in **Figure 73**.

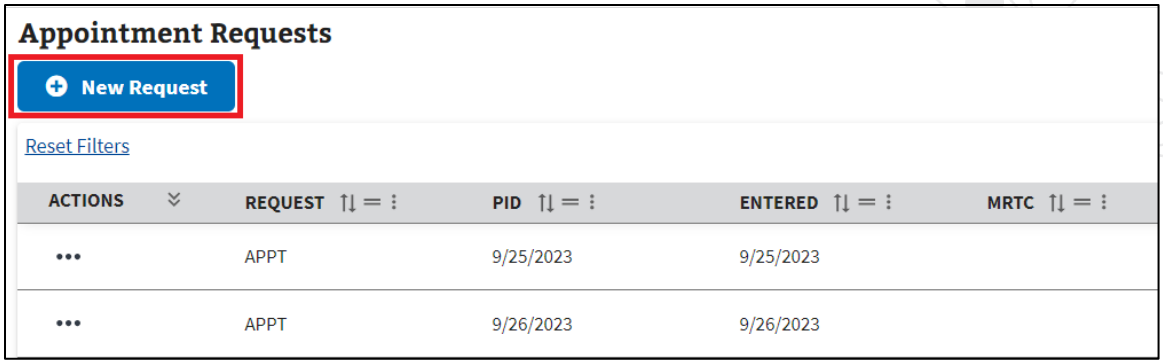


Figure 73: New Request Button for PtCSch Requests

5. The user will then select "PtCSch" from the dropdown that appears in **Figure 74** below.

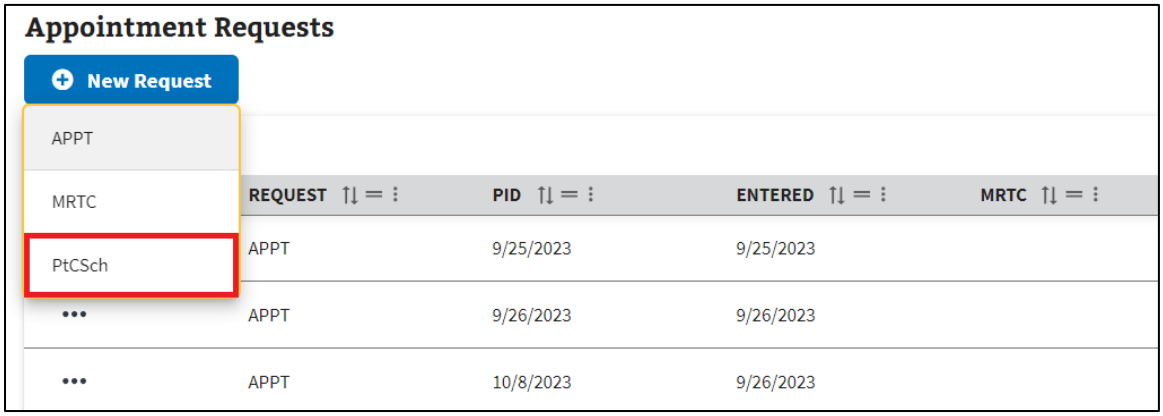


Figure 74: PtCSch Option from the New Request Dropdown

2. The user will be brought to the New PtCSch Request page. On this page, the user will need to fill out all the required information displayed in **Figure 75**. The user can also fill out any optional information as needed.

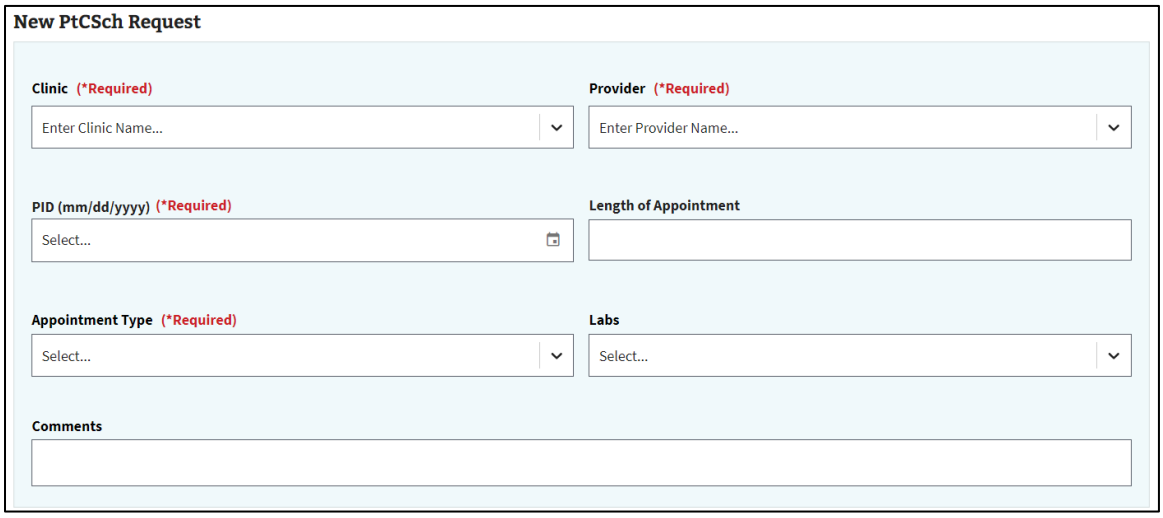


Figure 75: New PtCSch Request Page

3. Once all applicable information has been filled, the user will select the “Create Request” button, seen in **Figure 76**, to create the new PtCSch request.

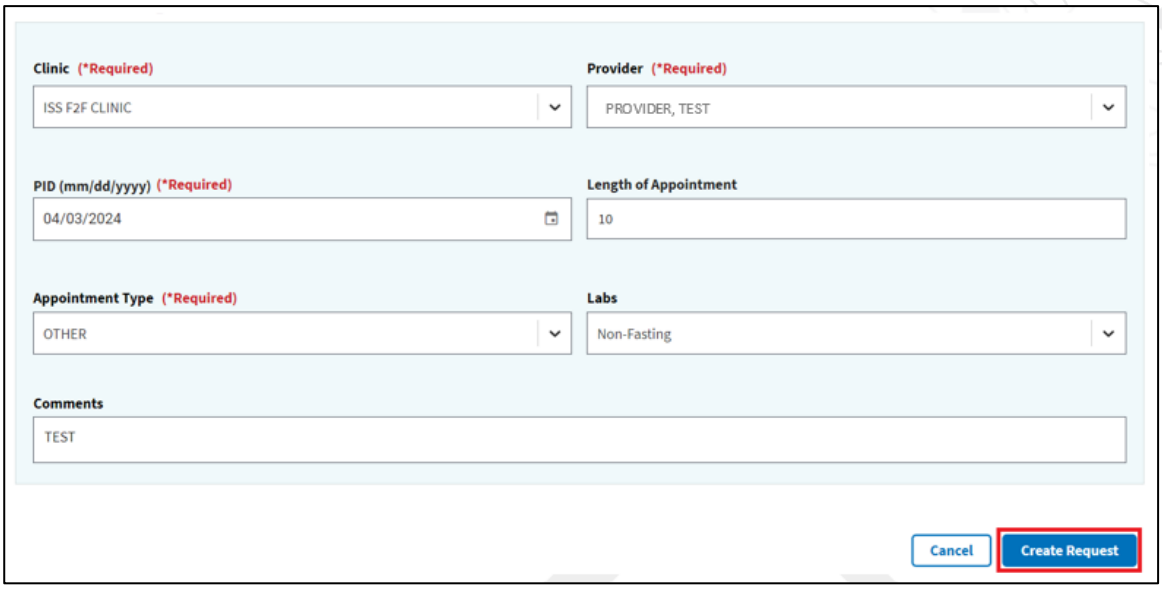


Figure 76: Create Request Button for PtCSch Requests

- *Note: The user can also select the “Cancel” button seen in **Figure 76** to exit creating a request and go back to the Appointments & Requests page.*

4.1.3 MRTC

1. To create a new MRTC request, the user will first need to select “New Request,” as shown in **Figure 77**.

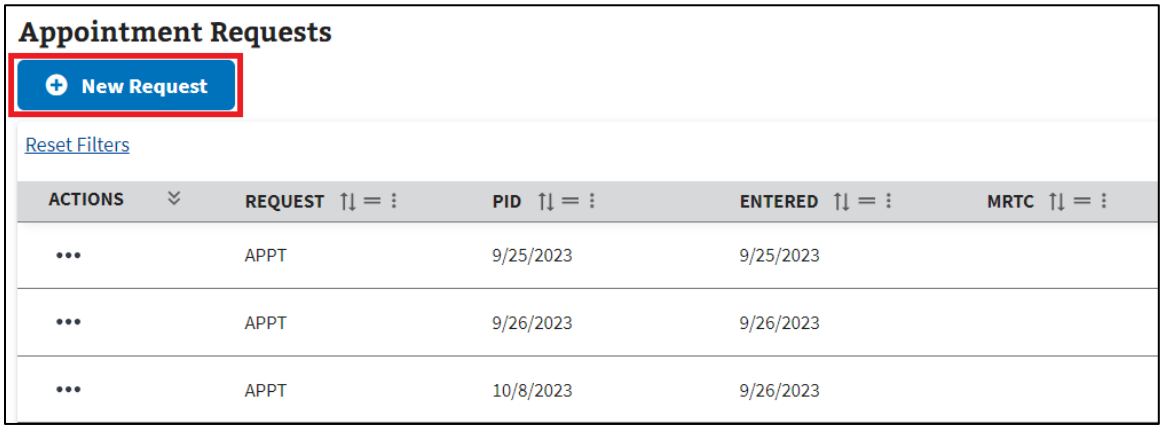


Figure 77: New Request Button for MRTC Requests

6. The user will then select “MRTC” from the dropdown that appears in **Figure 78** below.

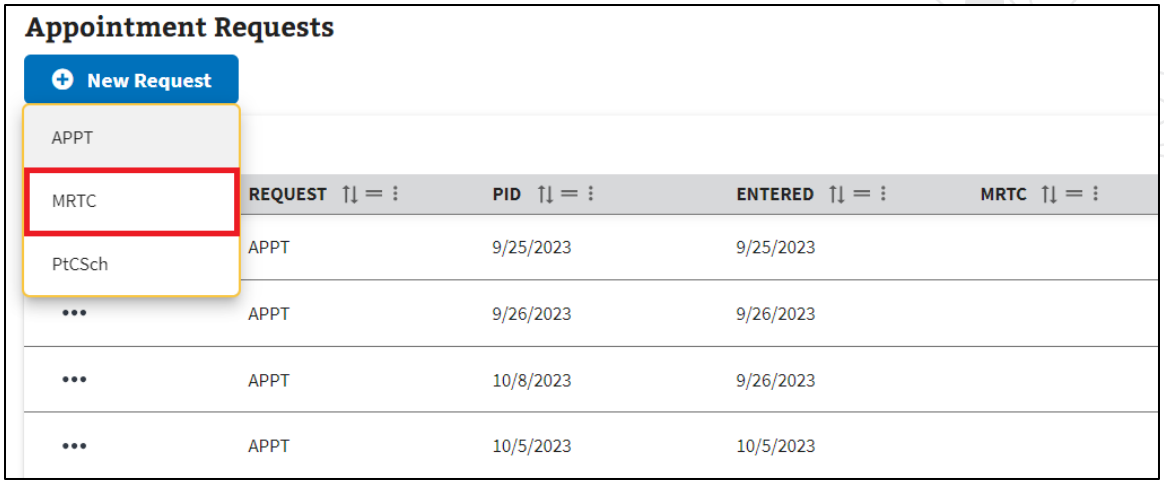


Figure 78: MRTC Option from New Request Dropdown

2. The user will be brought to the New MRTC Request (Multiple Returns to Clinic) page. On this page, the user will need to fill out all the required information displayed in **Figure 79**. The user can also fill out any optional information as needed.

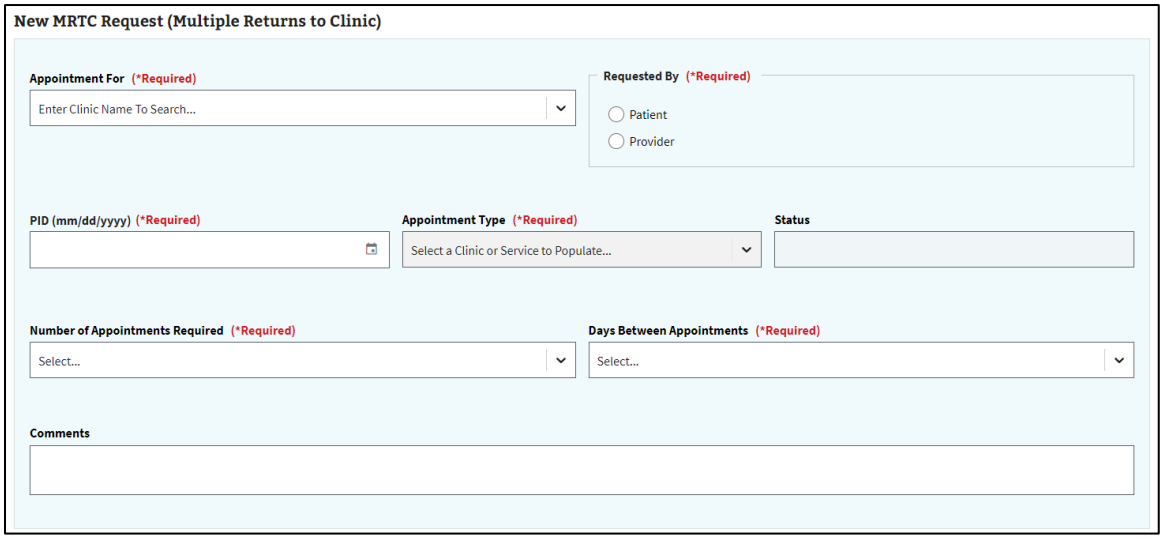


Figure 79: New MRTC Request Page

3. Once all applicable information has been filled, the user will select the “Create Request” button, seen in **Figure 80**, to create the new MRTC request.

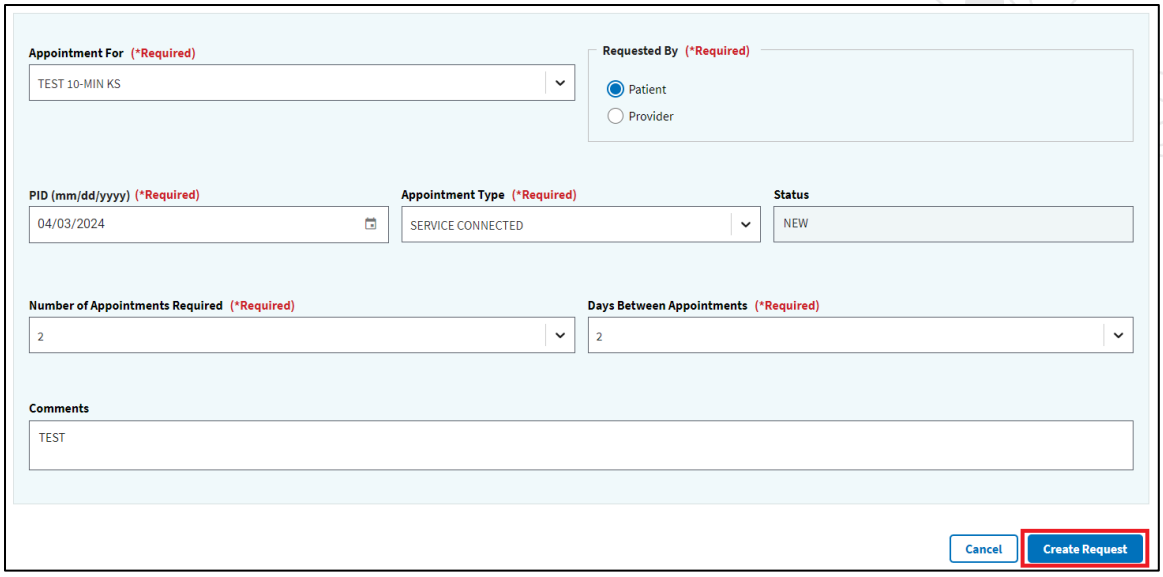


Figure 80: Create Request Button for MRTC Requests

- *Note: The user can also select the "Cancel" button seen in **Figure 80** to exit creating a request and go back to the Appointments & Requests page.*
- *Note: Once an MRTC Request has been created, it will appear within the Appointment Requests grid under the request type "APPT." To interact with the MRTC, the user can either select the ellipsis next to the parent MRTC or select the arrow next to the request to interact with each individual child request.*

4.1.4 Consult/Procedure

Consult and Procedure requests are not created within the ISS application. To interact with these requests, the user will need to locate any previously created Consult/Procedure requests by navigating the Appointment Requests grid (See **Figure 81** for an example.)

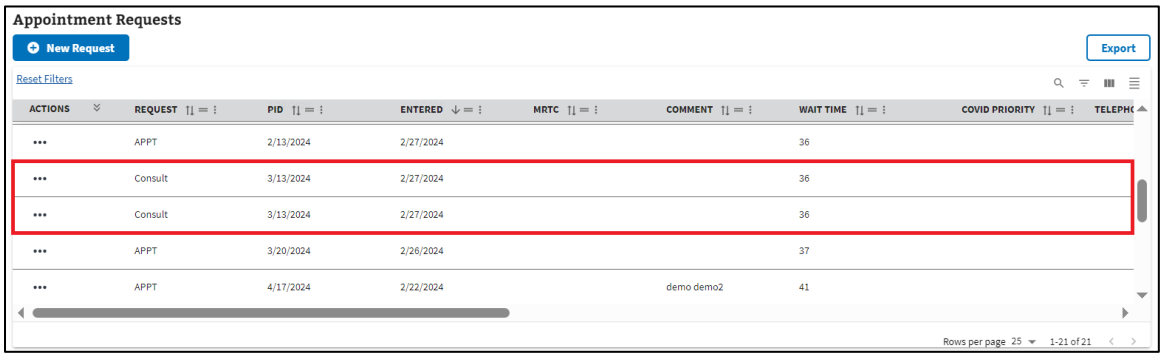


Figure 81: Example of Consult Requests in the Grid

4.1.5 RTC

RTC requests are not created within the ISS application. To interact with these requests, the user will need to locate any previously created RTC requests by navigating the Appointment Requests grid (See **Figure 82** for an example).

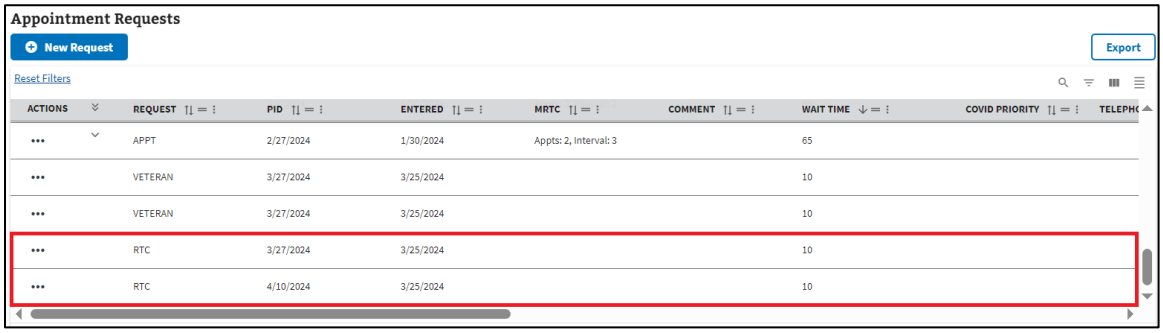


Figure 82: Example of RTC Requests in the Grid

4.1.6 VETERAN

VETERAN requests are not created within the ISS application. To interact with these requests, the user will need to locate any previously created VETERAN requests by navigating the Appointment Requests grid (See **Figure 83** for an example).

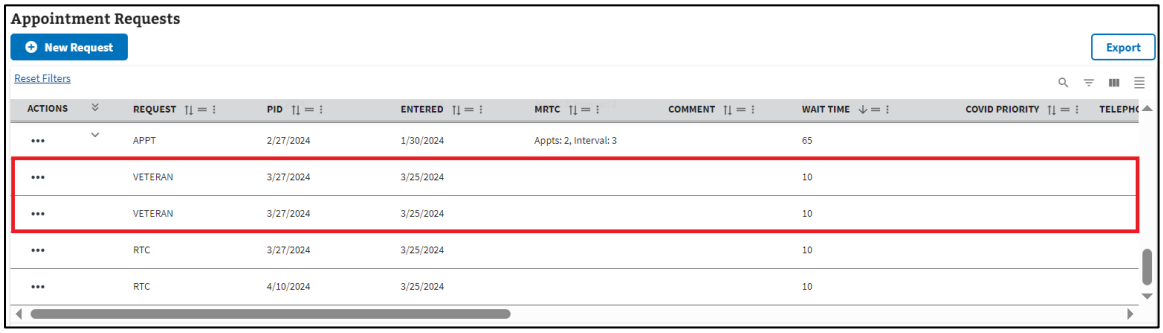


Figure 83: Example of VETERAN Requests in the Grid

4.2 Appointment Request Actions

4.2.1 Viewing Appointment Requests

1. To view an appointment request, the user can select the ellipsis, seen in **Figure 84**, next to any appointment within the grid.

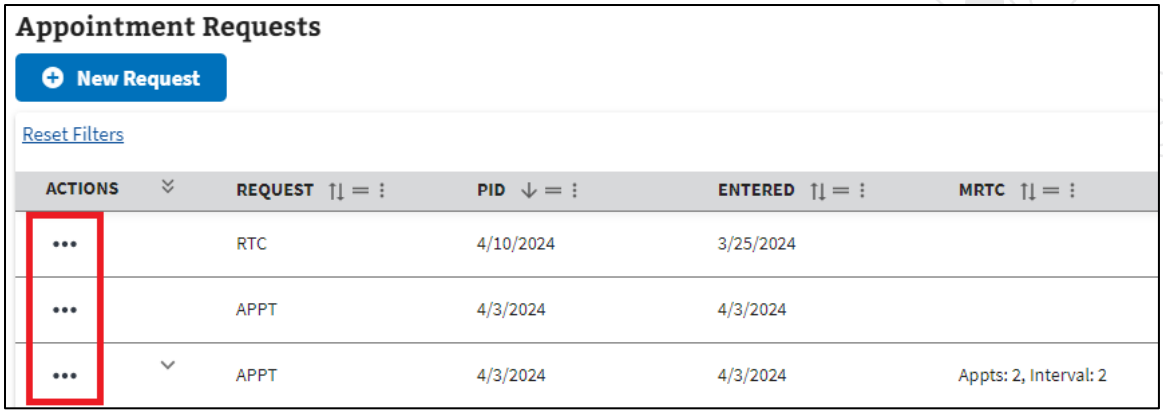


Figure 84: Selecting Action Menu Button to View Requests

2. This will cause the action menu to appear. The user will then need to select the "View" option, seen in **Figure 85**.

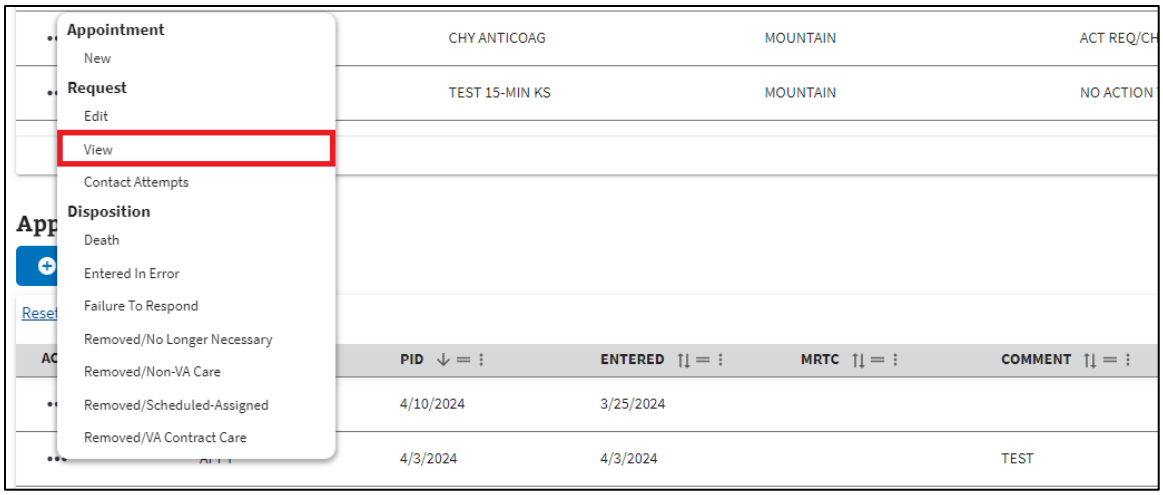


Figure 85: View Option from the Request Actions Dropdown

3. The user will be brought to the View (Appointment Request Type) Request page, shown below in **Figure 86**.

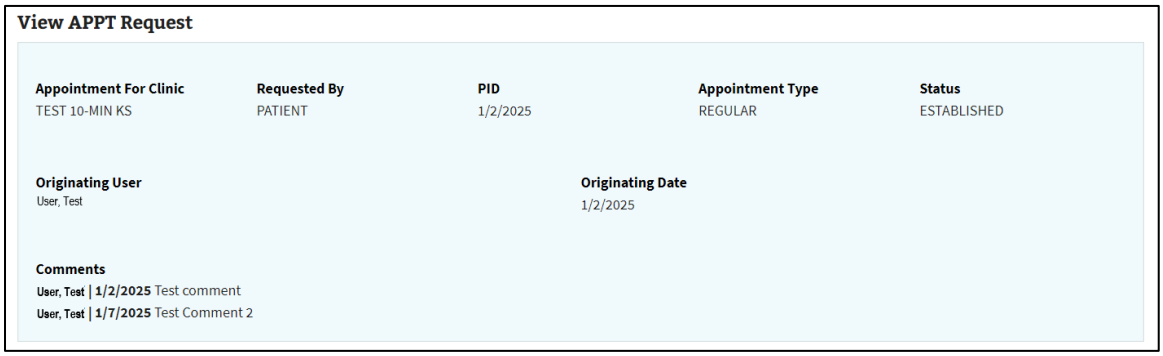


Figure 86: View APPT Request Page

- *Note: Users will be able to track comments via the View page. Comments will show the name of the commenter, as well as the date the comment was added to the appointment request (see **Figure 86** for example).*

4.2.2 Editing Appointment Requests

1. To edit an appointment request, the user will select the ellipsis, seen in **Figure 87**, next to any appointment within the grid.

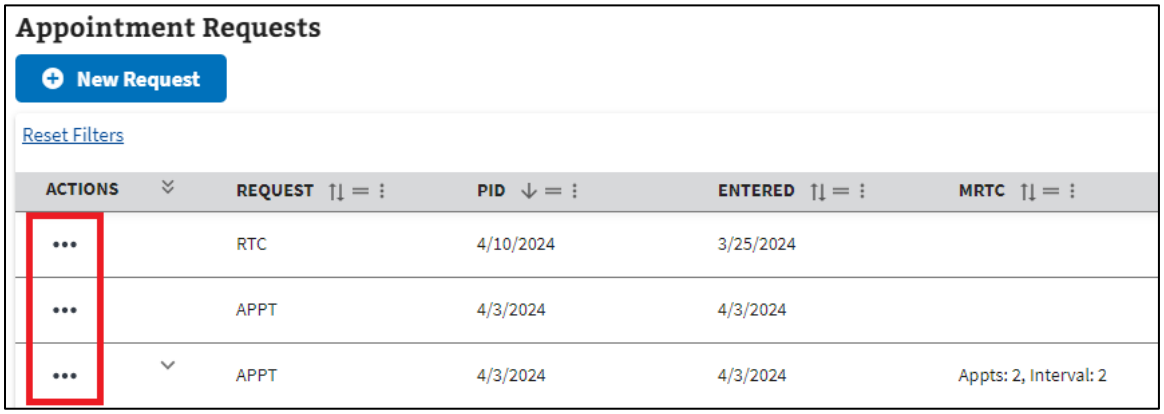


Figure 87: Selecting Action Menu Button to Edit Requests

2. This will cause the action menu to appear. The user will then need to select the "Edit" option, seen in **Figure 88**.

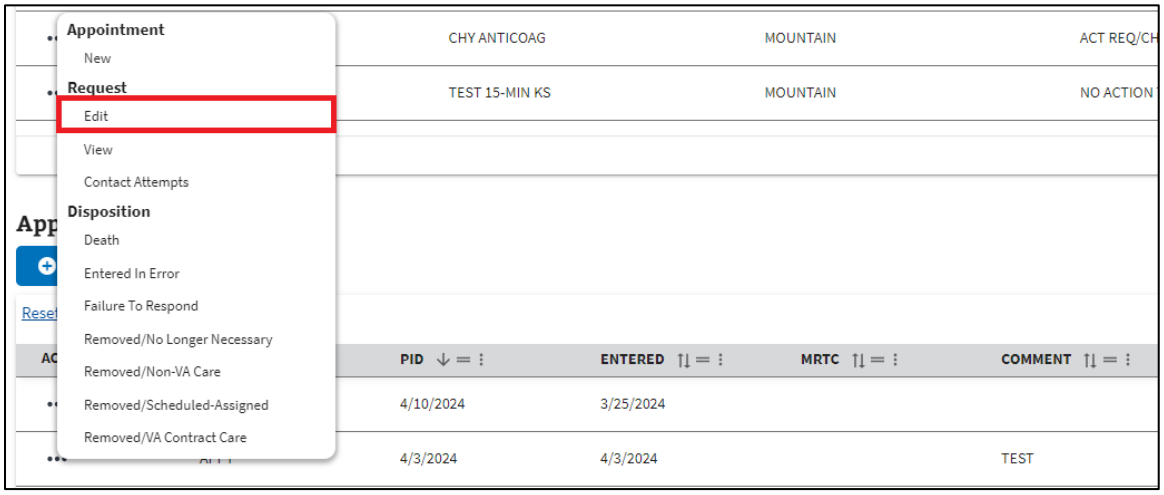


Figure 88: Edit Option from the Request Actions Dropdown

3. The user will be brought to the Edit (Appointment Request Type) Request page. On this page, the user can edit any of the fields highlighted below in **Figure 89**.

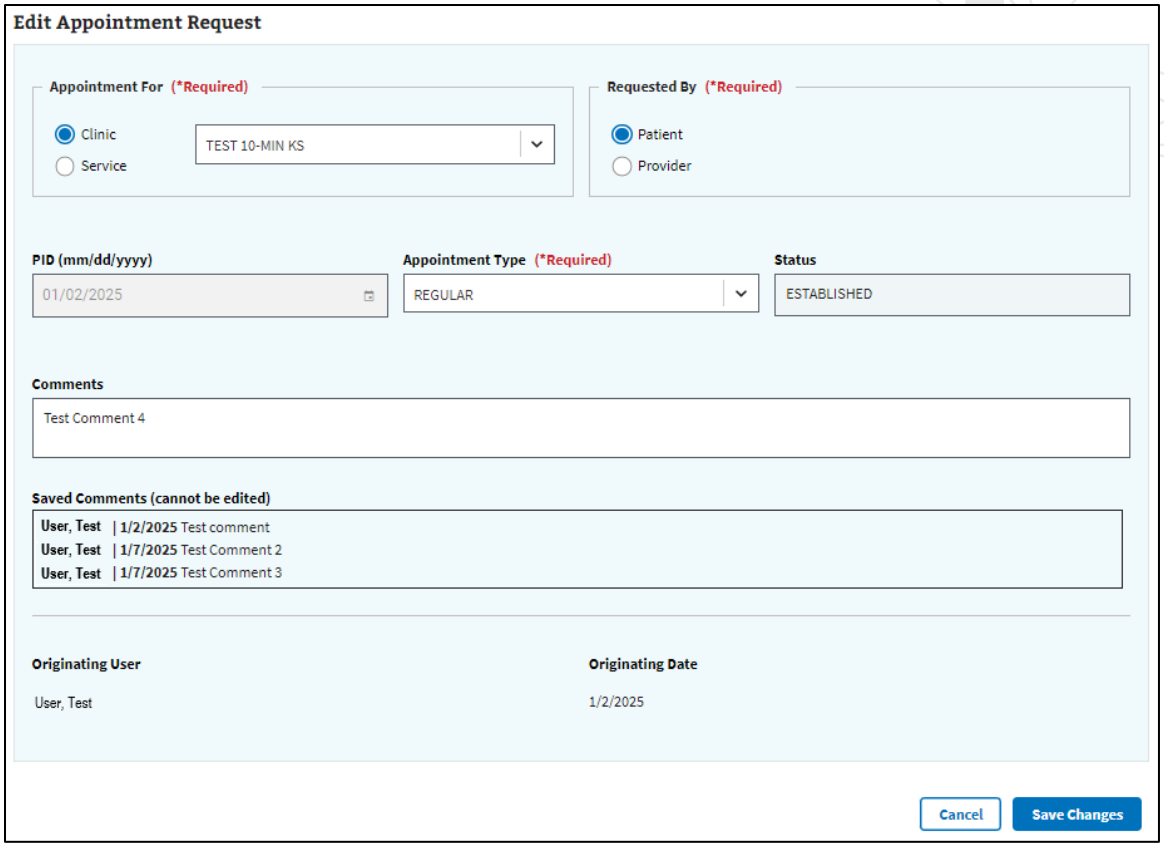


Figure 89: Edit Appointment Request Page

- ❖ *Note: Users can add additional comments to an appointment request, as well as track previous comments via the Edit page. Previous comments will show the name of the commenter and the date the comment was added (see **Figure 90** for example).*

4. Once all edits have been made, the user will need to select the "Save Changes" button, seen in **Figure 90**, to save any edits to the request.

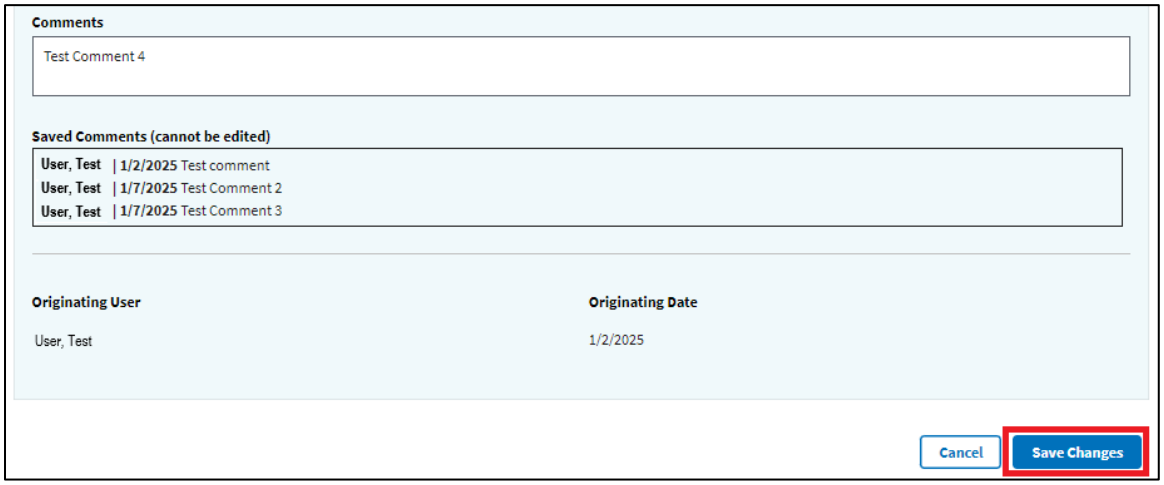


Figure 90: Save Changes Button for Editing Requests

❖ *Note: The user can also select the "Cancel" button seen in **Figure 90** to exit editing a request and go back to the Appointments & Requests page.*

4.2.3 Contact Attempts

1. To create a contact attempt request, the user will select the ellipsis, seen in **Figure 91**, next to any appointment within the grid.

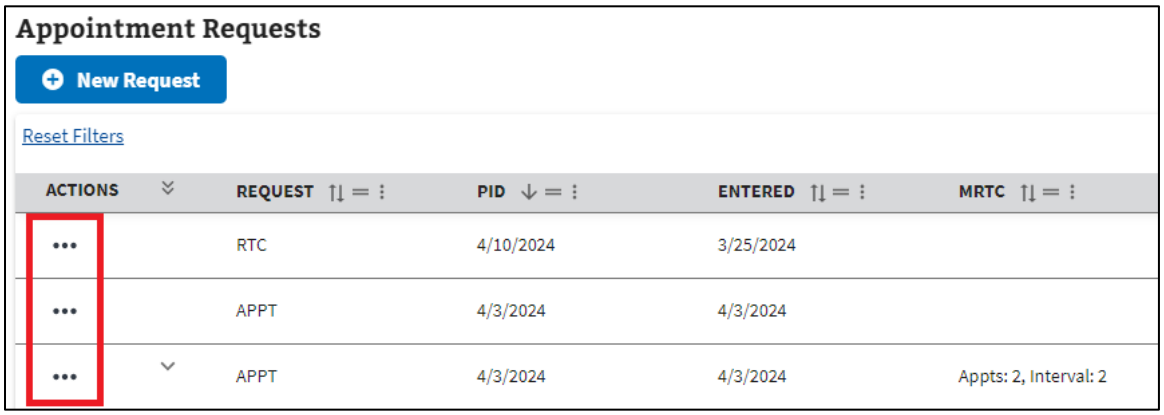


Figure 91: Selecting Action Menu Button to Create Contact Attempts

2. This will cause the action menu to appear. The user will then need to select the "Contact Attempts" option, seen in **Figure 92**.

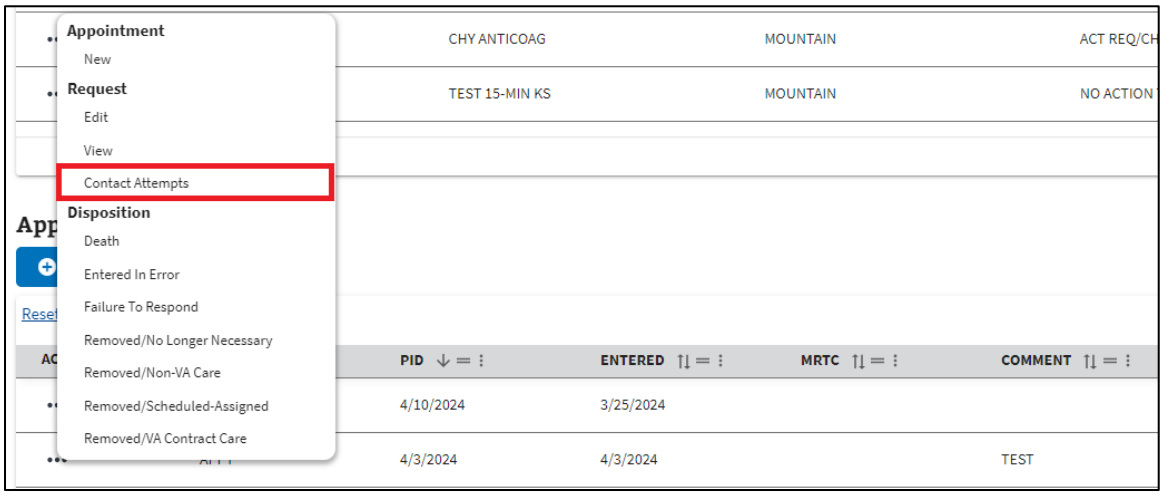


Figure 92: Contact Attempts Option from the Request Actions Dropdown

3. The user will be brought to the Contact Attempts page, shown below in **Figure 93**.

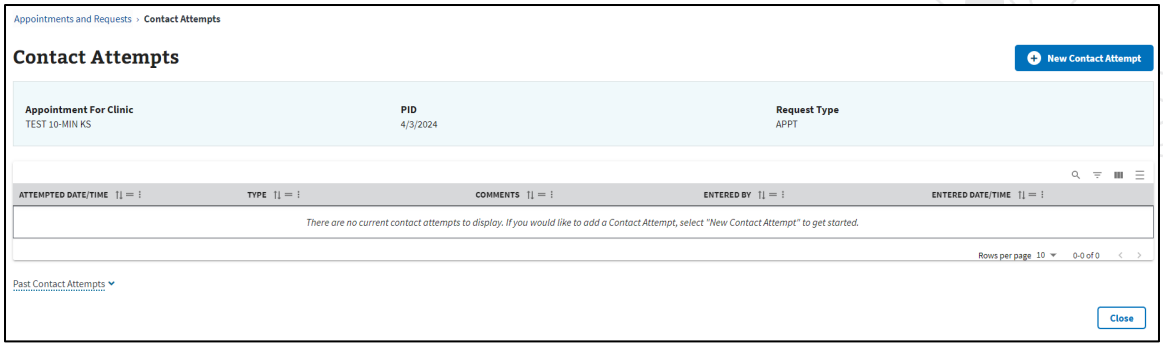


Figure 93: Contact Attempts Page

4. To create a new contact attempt, the user will need to select the "New Contact Attempt" button seen in **Figure 94**.

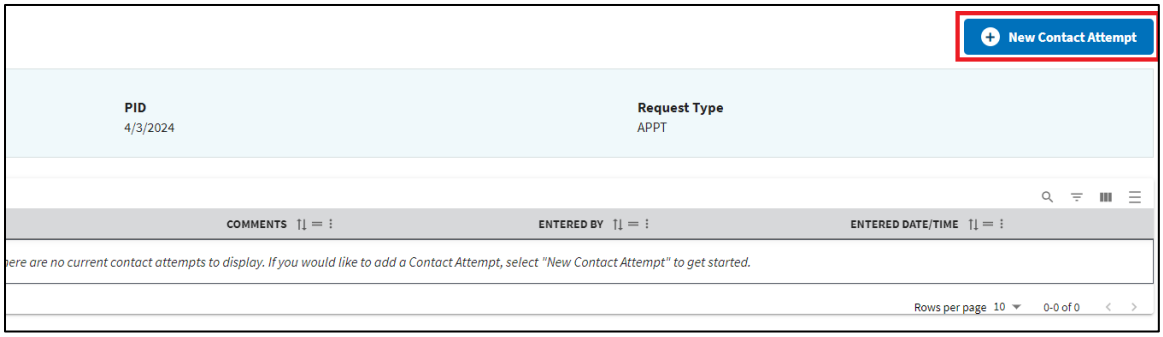


Figure 94: New Contact Attempt Button

5. The user will be brought to the Create Contact Attempt Page seen in **Figure 95** below. From here, the user will need to fill out the required information displayed and fill out any optional information as needed.

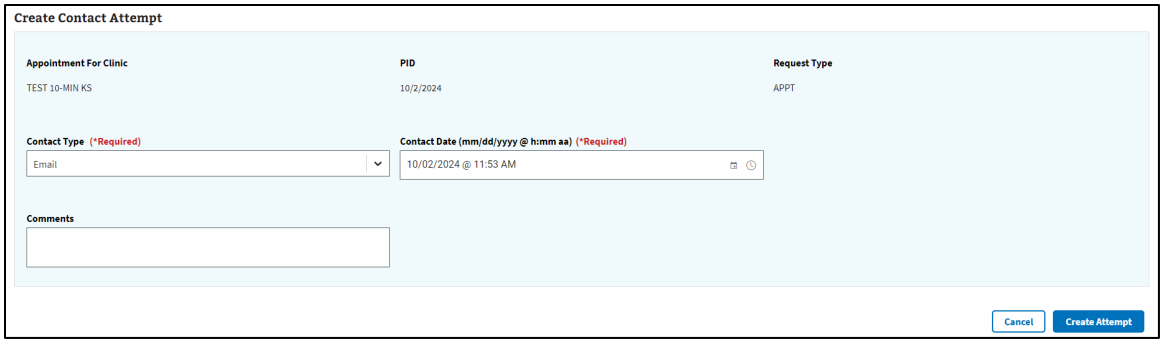


Figure 95: Create Contact Attempt Page

- ❖ *Note: The first contact attempt cannot be done via a letter. Once the user has made at least one contact attempt, the "Letter" option will be available within the Contact Type field.*

6. Once the user has filled out all applicable information, the user will need to select the "Create Attempt" button, seen in **Figure 96**, to create the contact attempt.

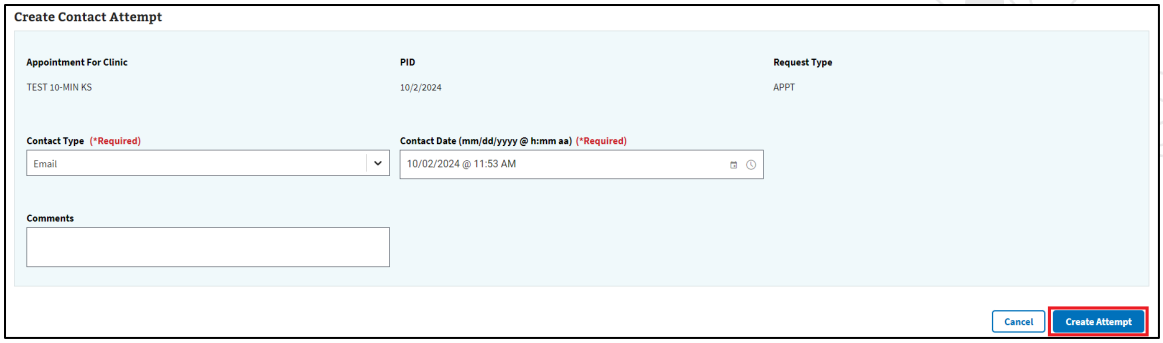


Figure 96: Create Attempt Button

- ❖ *Note: The user can also select the "Cancel" button seen in **Figure 96** to exit creating a contact attempt and go back to the Contact Attempts page.*

7. After saving their changes, the user will be brought back to the Contact Attempts page. The grid, shown below in **Figure 97**, will be updated with the newly created contact attempt information.

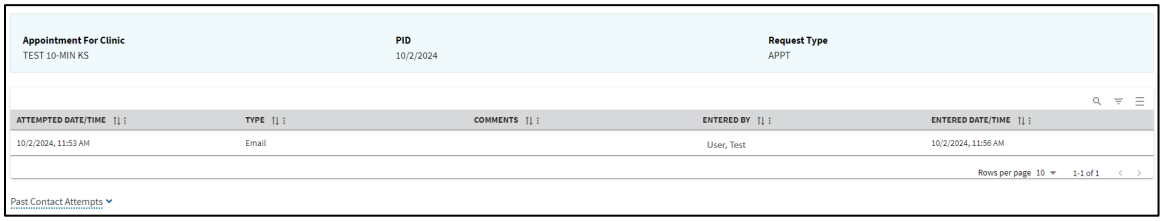


Figure 97: Example of Contact Attempts Grid after Creating Attempt

4.2.4 Disposition an APPT, RTC, or VETERAN Request

1. To disposition an APPT, RTC, or VETERAN request, the user will select the ellipsis, seen in **Figure 98**, next to any appointment within the grid.

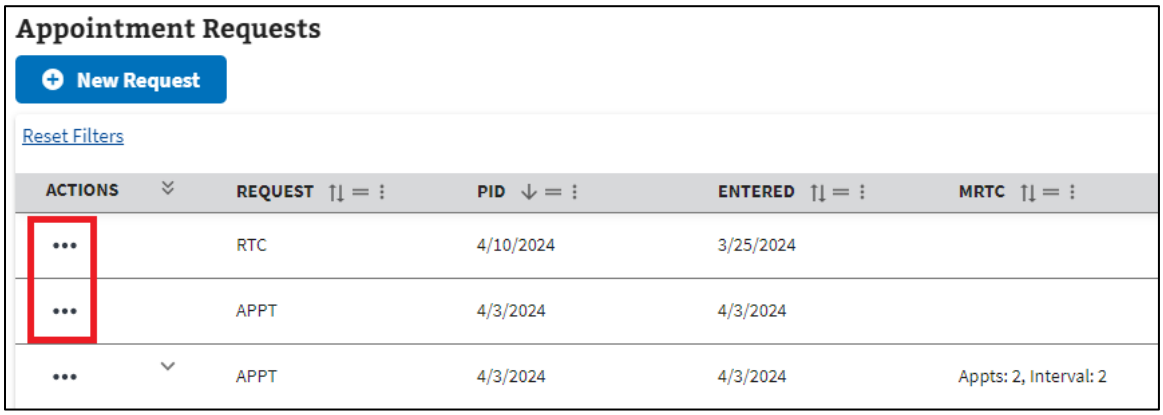


Figure 98: Selecting Action Menu Button to Disposition Requests

2. This will cause the action menu to appear. The user will then need to select one of the disposition options highlighted below in **Figure 99**.

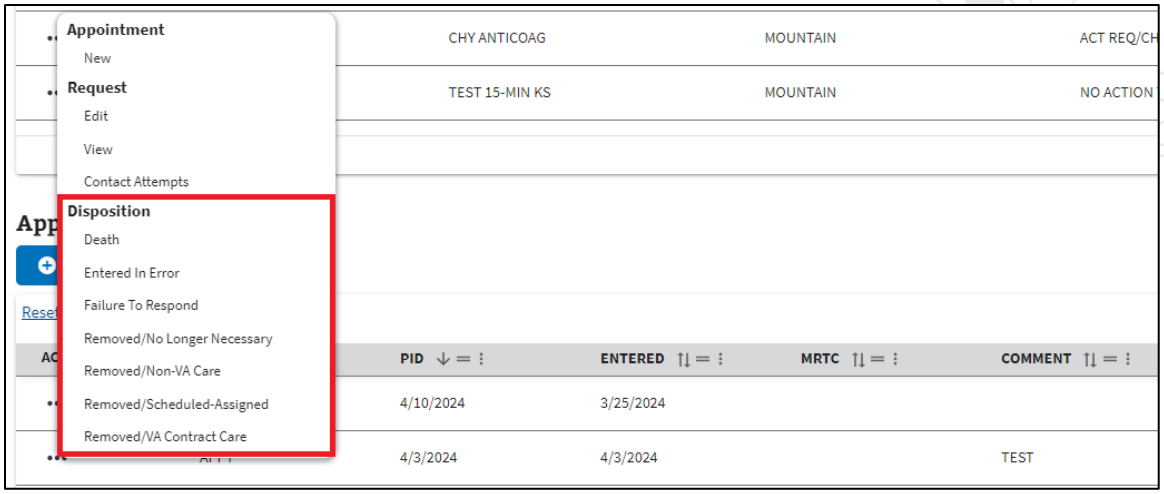


Figure 99: Disposition Options from the Request Actions Dropdown

- ❖ *Note: When dispositioning a request via failure to respond, the user will need to have made at least 2 contact attempts at least 2 weeks prior to the disposition date. Attempting to disposition otherwise will result in the notification seen in **Figure 100** below.*

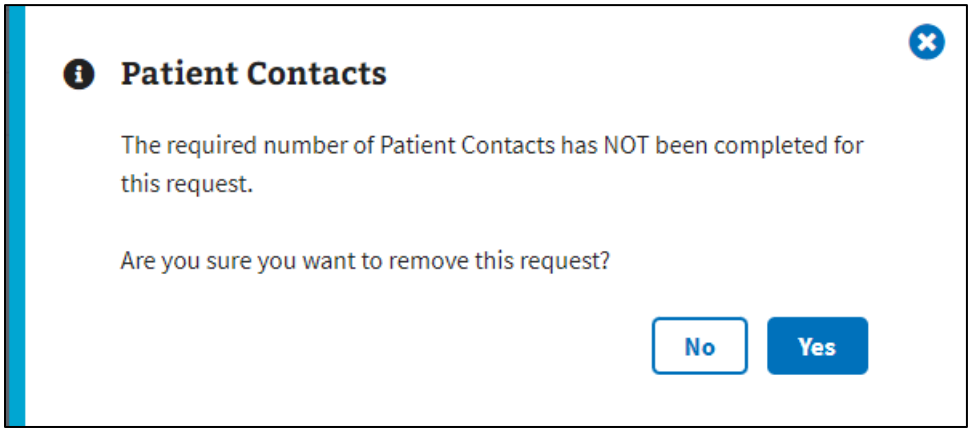


Figure 100: Notification when Dispositioning Failure to Respond without Attempts

3. Once the disposition type has been selected, the page will automatically refresh, and the request will be removed from the Appointment Requests grid.

4.2.5 Disposition a PtCSch Request

1. To disposition a PtCSch request, the user will select the ellipsis, seen in **Figure 101**, next to any appointment within the grid.

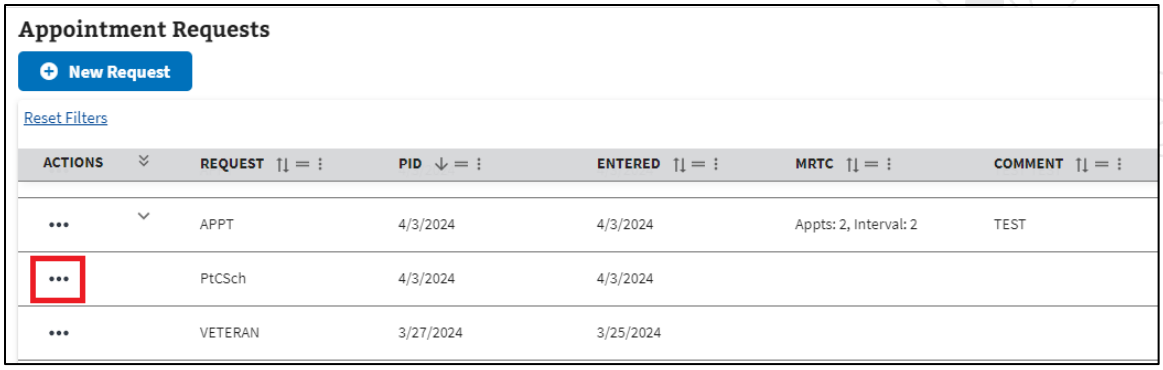


Figure 101: Selecting Action Menu Button to Disposition Requests for PtCSch

2. This will cause the action menu to appear. The user will then need to select one of the disposition options highlighted below in **Figure 102**.

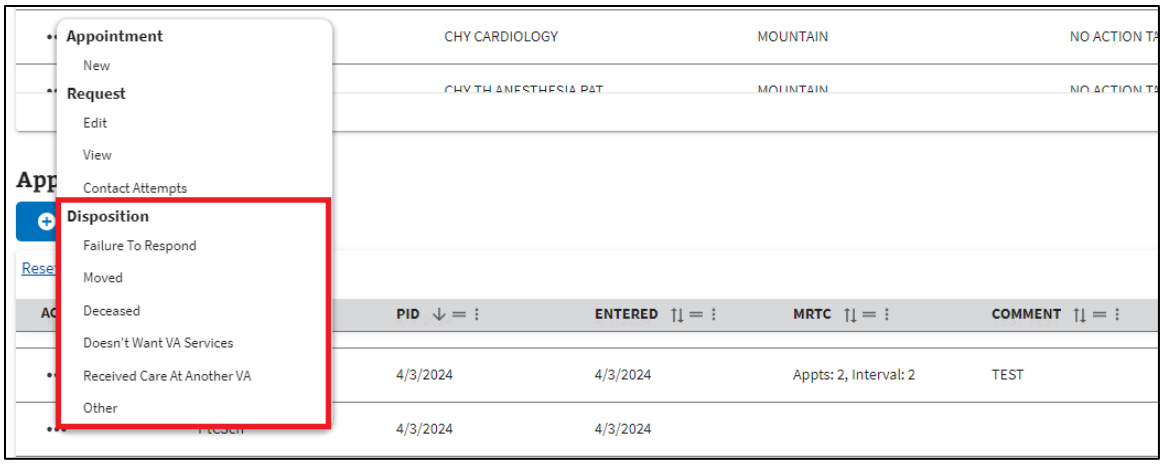


Figure 102: Disposition Options for PtCSch on the Requests Actions Dropdown

- ***Note: When dispositioning a request via failure to respond, the user will need to have made at least 2 contact attempts at least 2 weeks prior to the disposition date. Attempting to disposition otherwise will result in the notification seen in Figure 103 below.***

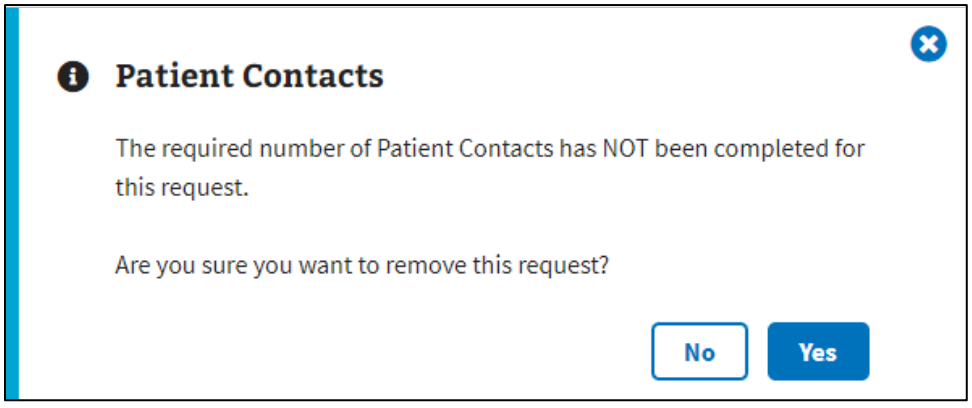


Figure 103: Notification when Dispositioning Failure to Respond without Attempts on PtCSch

3. After the disposition type is selected, the PtCSch Disposition window will appear. The user can choose to add a comment, if needed, and then select "Continue" to finish the disposition, as seen in **Figure 104**.

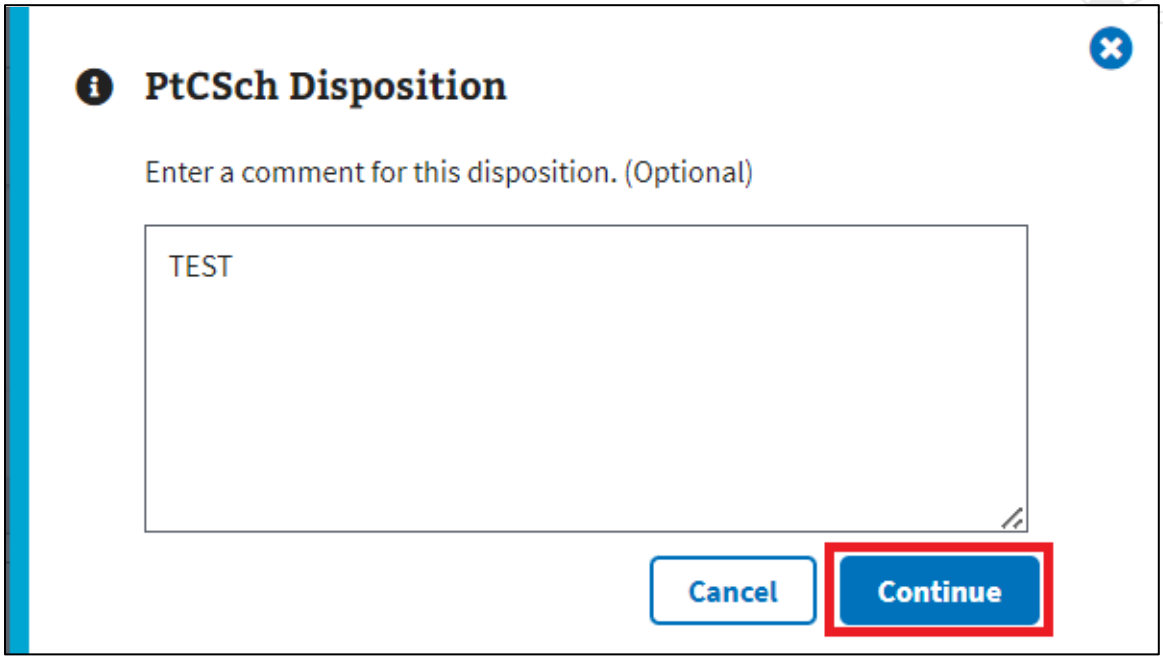


Figure 104: Continue Button for Disposition Comments Window for PtCSch Requests

- ❖ *Note: The user can also select the "Cancel" button or the "x" button, seen in **Figure 104**, to cancel the disposition and go back to the Appointments & Requests page.*

4. The page will automatically refresh, and the request will be removed from the Appointment Requests grid.

4.2.6 Disposition an MRTC Parent Request

1. When dispositioning an MRTC request, the user can choose to either disposition an individual child request (See **4.2.7 Disposition an MRTC Child Request**), or the parent request. To disposition a parent request, the user will select the ellipsis, seen in **Figure 105**, next to the parent request within the grid.

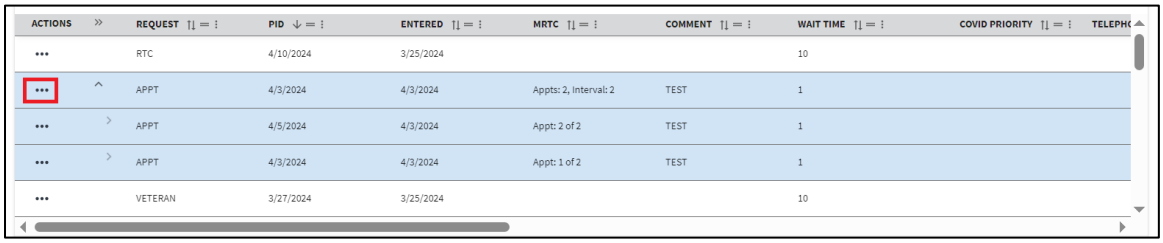


Figure 105: Selecting Action Menu Button to Disposition for MRTC Parent Requests

2. This will cause the action menu to appear. The user will then need to select one of the disposition options highlighted below in **Figure 106**.

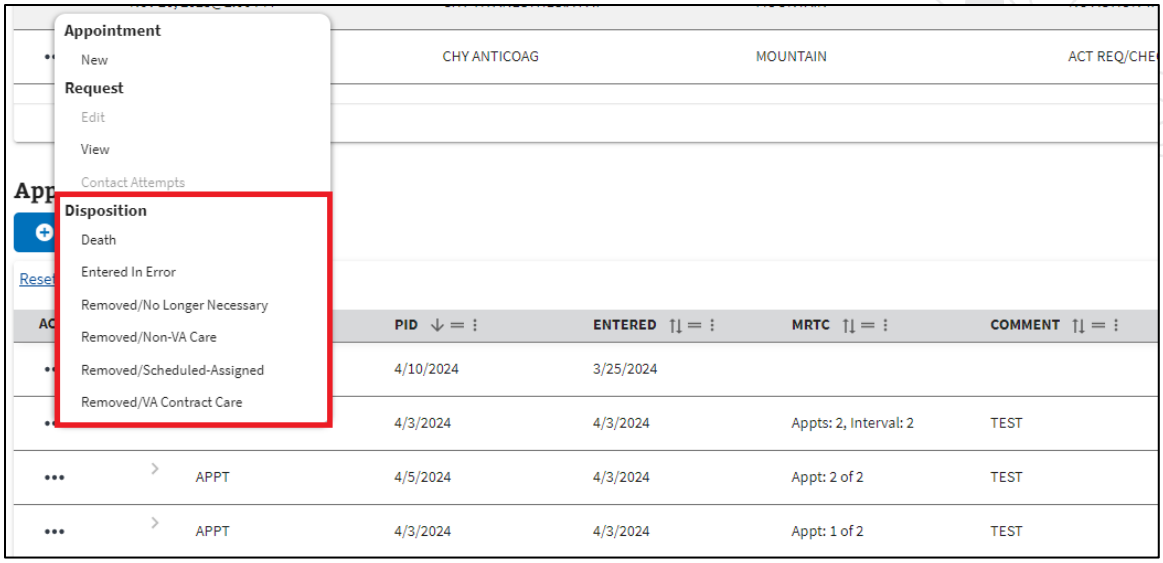


Figure 106: Disposition Options for MRTC Parent Request on the Actions Dropdown

- *Note: When dispositioning a request via failure to respond, the user will need to have made at least 2 contact attempts at least 2 weeks prior to the disposition date. Attempting to disposition otherwise will result in the notification seen in **Figure 107** below.*

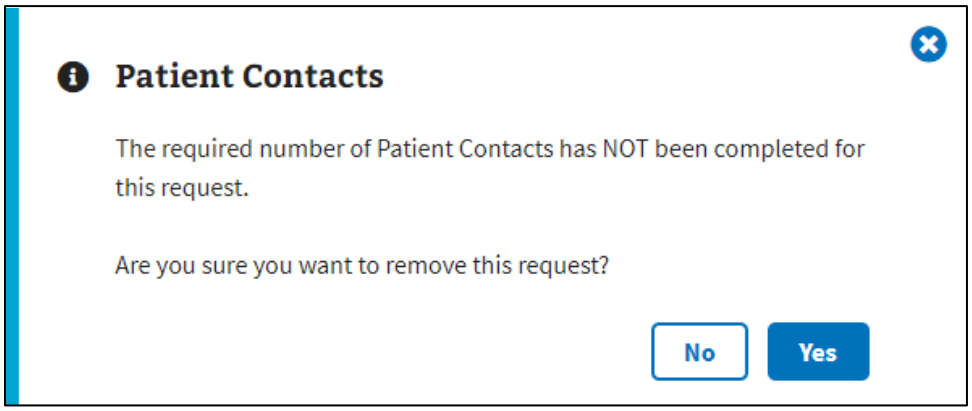


Figure 107: Notification when Dispositioning Failure to Respond without Attempts on MRTC Parent Requests

3. After the disposition type is selected, the user will be brought to the Close MRTC Request page. For a parent request, all pending appointments and requests will be dispositioned. The user will select the "Disposition MRTC" button, seen in **Figure 108**, to finish the disposition.

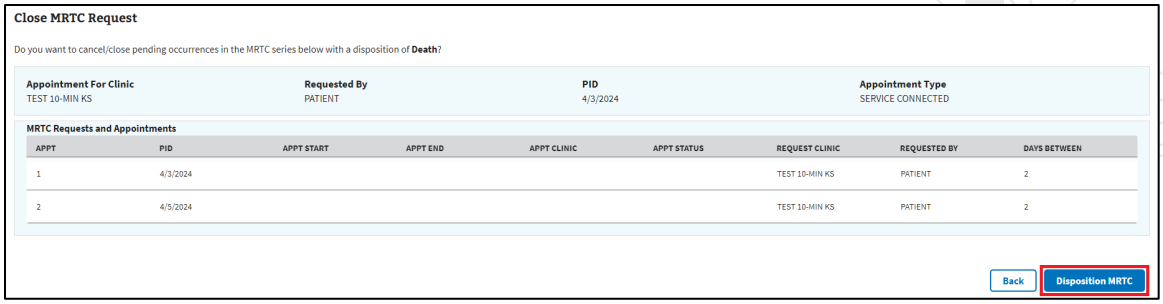


Figure 108: Disposition MRTC Button for Parent Requests

- *Note: If a pending appointment exists when dispositioning a parent request, the user will also need to fill out the fields under the Cancel MRTC Appointment(s) section, seen in **Figure 109**, before continuing. The user will have the option to preview a cancellation letter, if needed.*

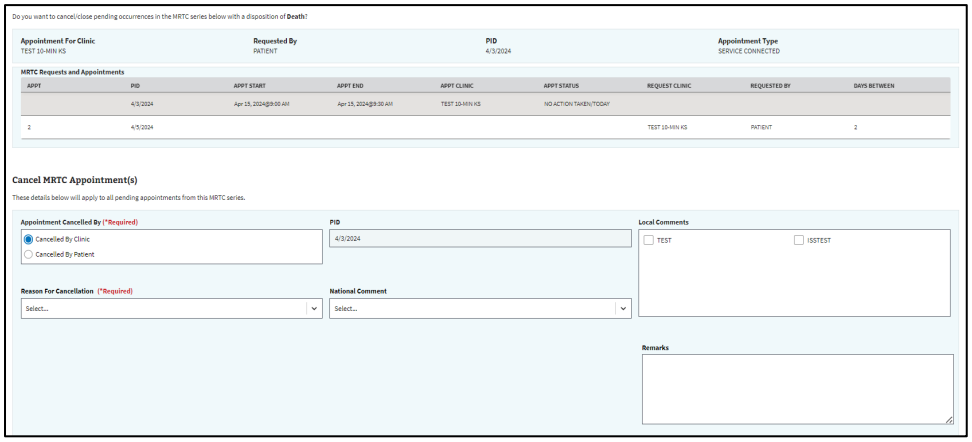


Figure 109: Cancel MRTC Section Example when Dispositioning Parent Request

- *Note: The user can also select the "Back" button seen in **Figure 108** to cancel the disposition and go back to the Appointments & Requests page.*

4.2.7 Disposition an MRTC Child Request

1. To disposition a child request, the user will need to expand the MRTC request by selecting the arrow next to the MRTC parent. The user will then need to select one of the corresponding ellipsis next to a child appointment, as shown in **Figure 110** below.

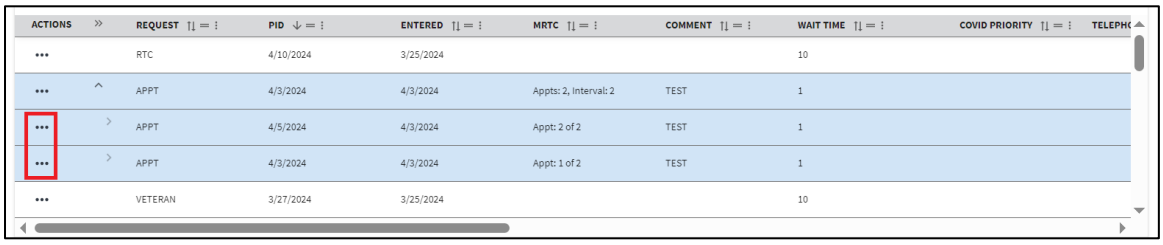


Figure 110: Selecting Action Menu Button to Disposition for MRTC Child Requests

2. This will cause the action menu to appear. The user will then need to select one of the disposition options highlighted below in **Figure 111**.

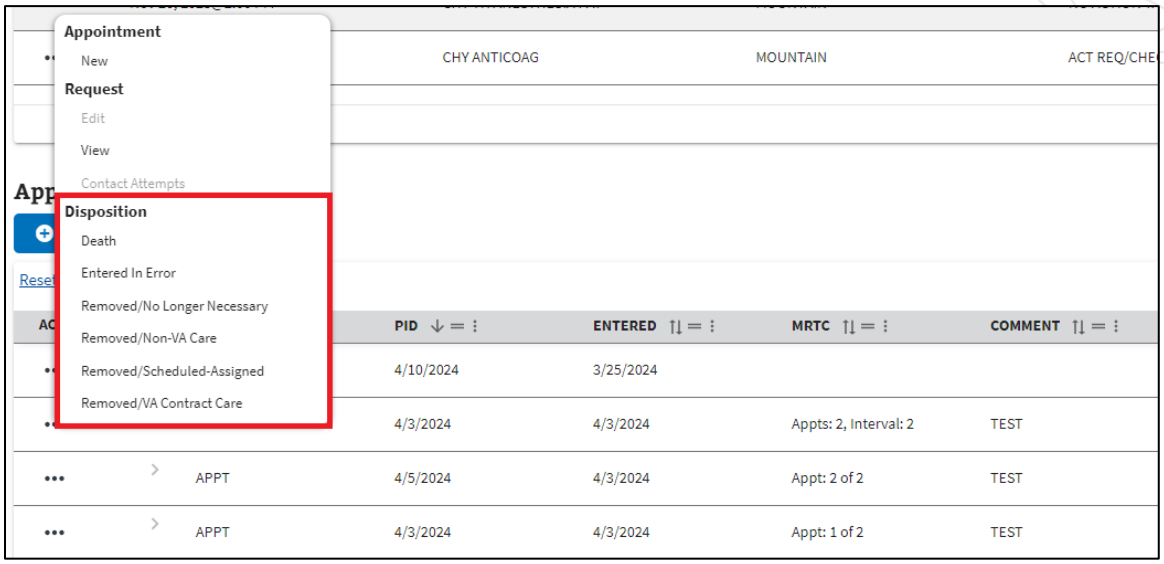


Figure 111: Disposition Options for MRTC Child Requests on the Actions Dropdown

- *Note: When dispositioning a request via failure to respond, the user will need to have made at least 2 contact attempts at least 2 weeks prior to the disposition date. Attempting to disposition otherwise will result in the notification seen in **Figure 112** below.*

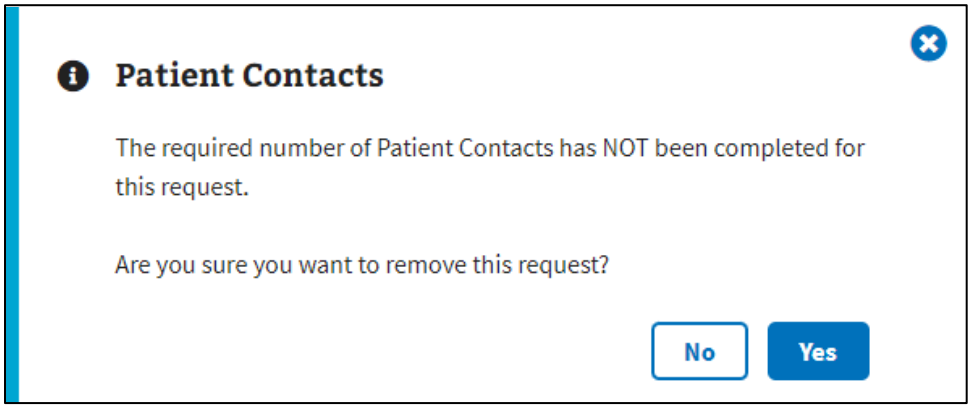


Figure 112: Notification when Dispositioning Failure to Respond without Attempts on MRTC Child Requests

3. After the disposition type is selected, the user will be brought to the Close MRTC Request page. For a child request, the user will be given the option to close either the selected appointment request only, or all the appointment requests in the series. Once making their preferred selection, the user will select the "Disposition MRTC" button, seen in **Figure 113**, to finish the disposition.

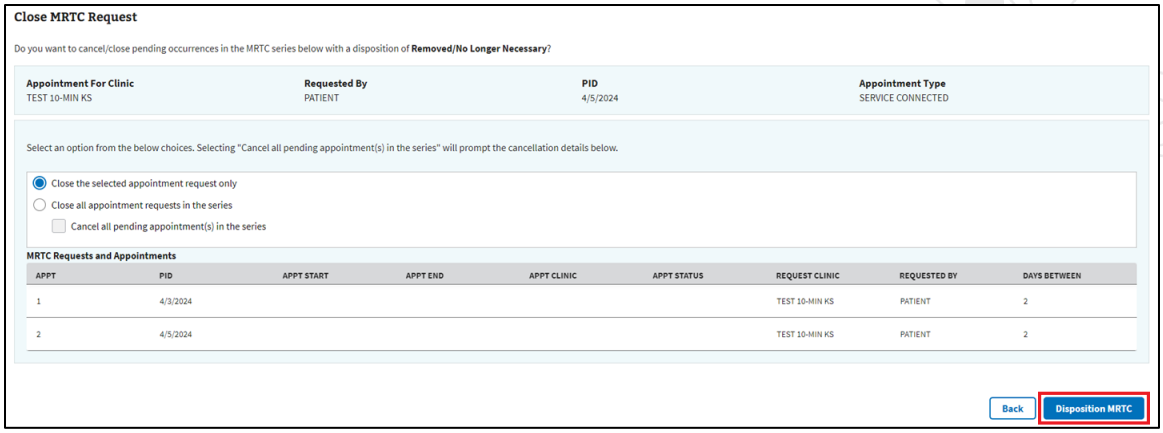


Figure 113: Disposition MRTC Button for MRTC Child Requests

- *Note: If the user decides to cancel all appointments and requests and a pending appointment exists when dispositioning a child request, the user will also need to fill out the fields under the Cancel MRTC Appointment(s) section, seen in **Figure 114**, before continuing. The user will have the option to preview a cancellation letter, if needed.*

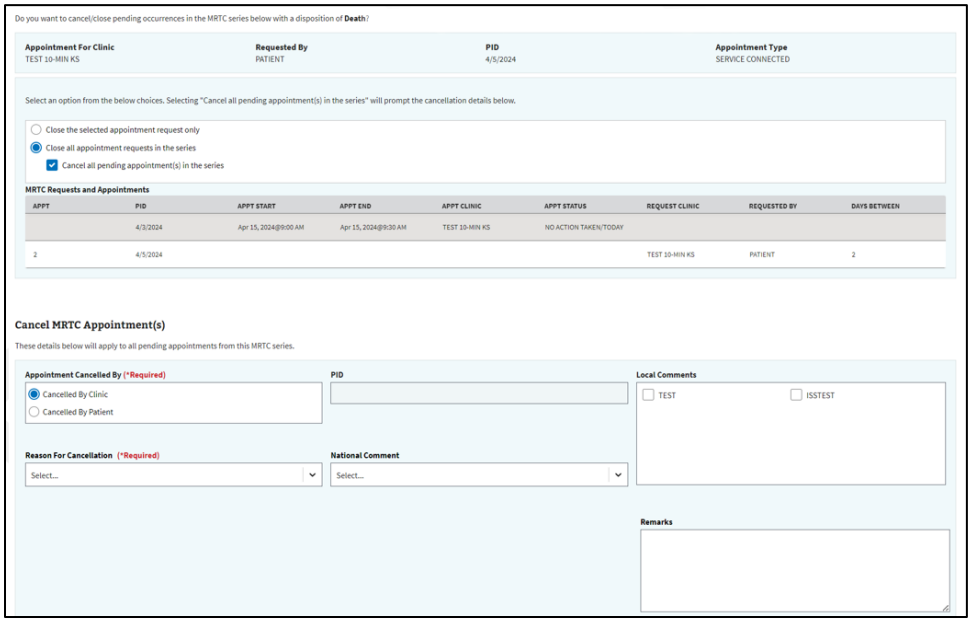


Figure 114: Cancel MRTC Section Example when Dispositioning Child Requests

- *Note: The user can also select the "Back" button seen in **Figure 113** to cancel the disposition and go back to the Appointments & Requests page.*

4.3 Creating a Pending Appointment

4.3.1 APPT

1. To create an APPT appointment, the user will first need to create a request by following the steps in **4.1.1 APPT**.
2. After creating the appointment request, the user will select the ellipsis, seen in **Figure 115**, next to the request within the grid.

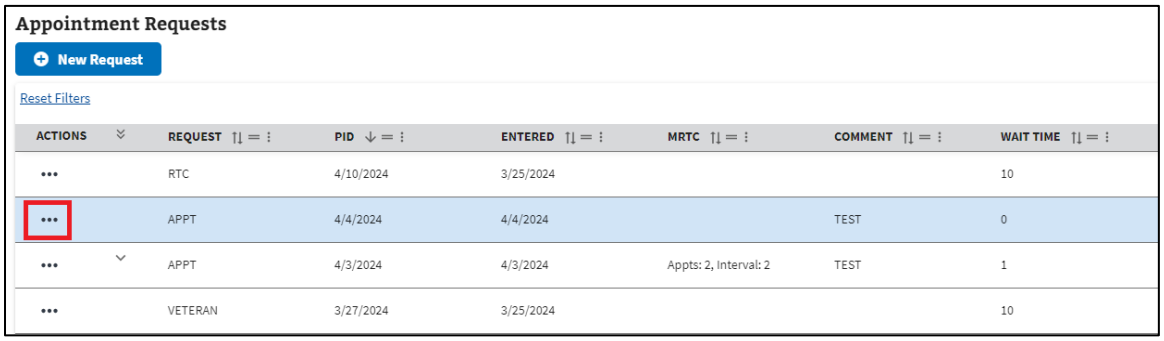


Figure 115: Selecting Action Menu Button to Create APPT Appointment

3. This will cause the action menu to appear. The user will then need to select the "New" option, seen in **Figure 116**.

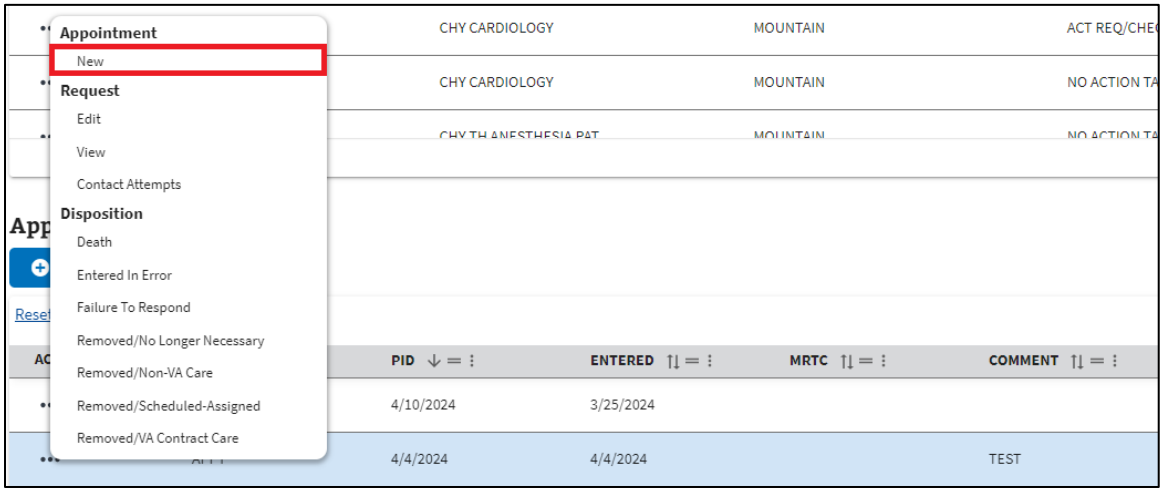


Figure 116: New Option from the Request Actions Dropdown for APPT

4. The user will be brought to the Schedule Search page shown below. On this page, the user can right click within the preferred timeslot on the calendar and select the "Create Appointment" option seen in **Figure 117**.

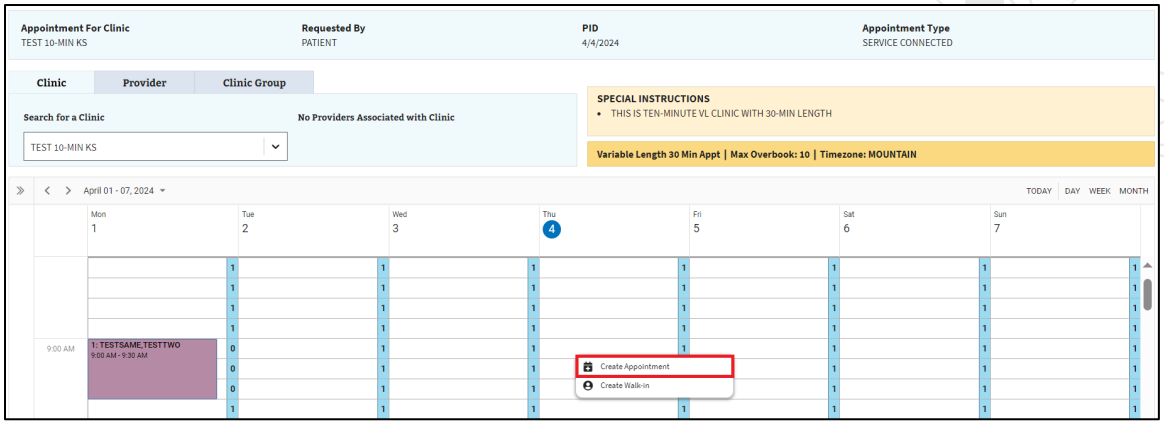


Figure 117: Create Appointment Button for APPT

5. The user will be brought to the New Appointment page. On this page, the user will need to fill out all the required information displayed in **Figure 118**. The user can also fill out any optional information as needed.

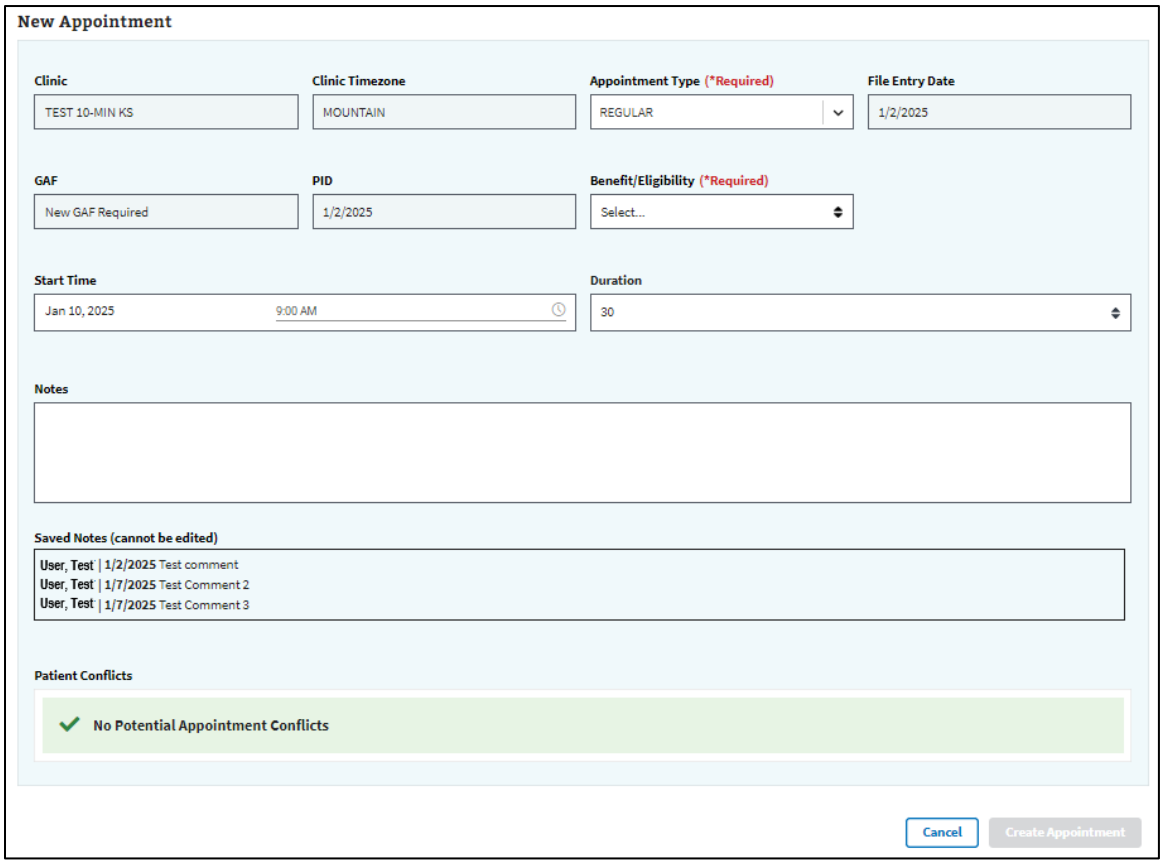


Figure 118: New Appointment Page for APPT

- ❖ *Note: Users will be able to track comments via the New Appointment page. Comments will show the name of the commenter, as well as the date the comment was added to the appointment request.*

6. Once all applicable information has been filled, the user will select the “Create Appointment” button, seen in **Figure 119**, to create the new APPT appointment.

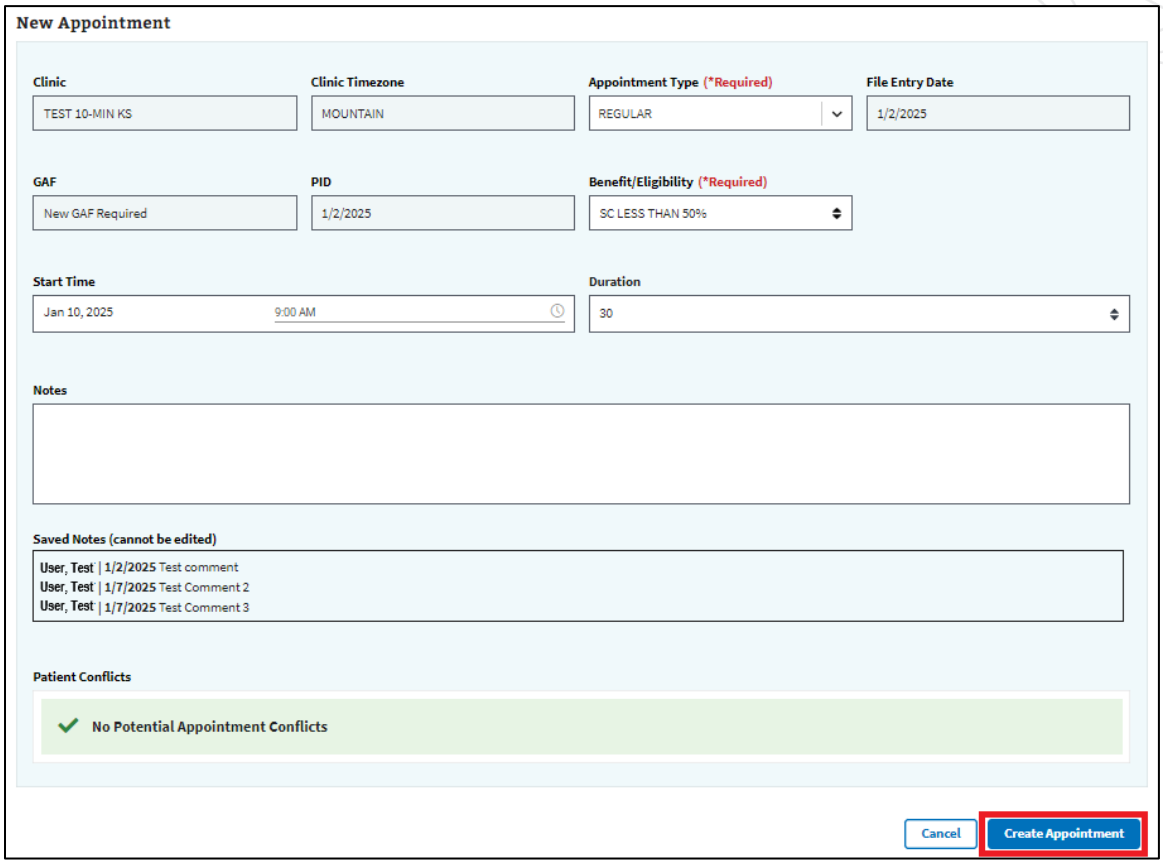


Figure 119: Create Appointment Button for New APPT

- *Note: The user can also select the “Cancel” button seen in **Figure 119** to exit creating an appointment and go back to the Appointments & Requests page.*

7. The Appointment Successfully Created window, shown below in **Figure 120**, will appear. The user can choose to preview the patient letter, if needed, or select “Close” to continue.



Figure 120: Preview Patient Letter Window for Creating APPT Appointment

4.3.2 PtCSch (Recall)

1. To create a PtCSch appointment, the user will first need to create a request by following the steps in **4.1.2 PtCSch (Recall)**.
2. After creating the appointment request, the user will select the ellipsis, seen in **Figure 121**, next to the request within the grid.

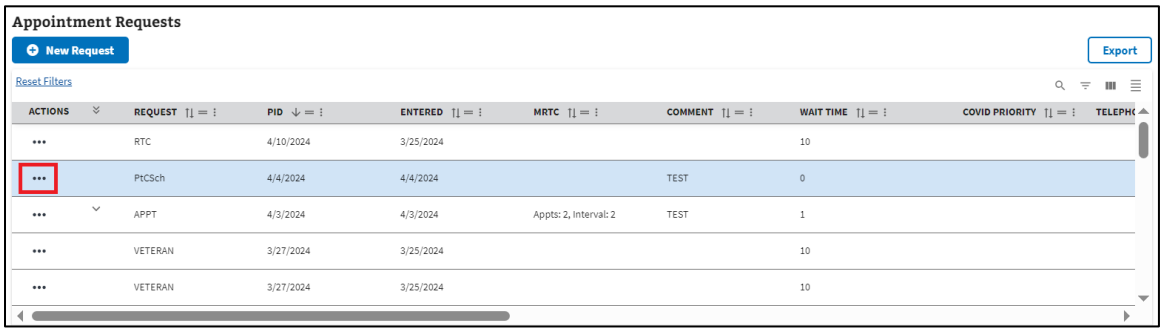


Figure 121: Selecting Action Menu Button to Create PtCSch Appointment

3. This will cause the action menu to appear. The user will then need to select the "New" option, seen in **Figure 122**.

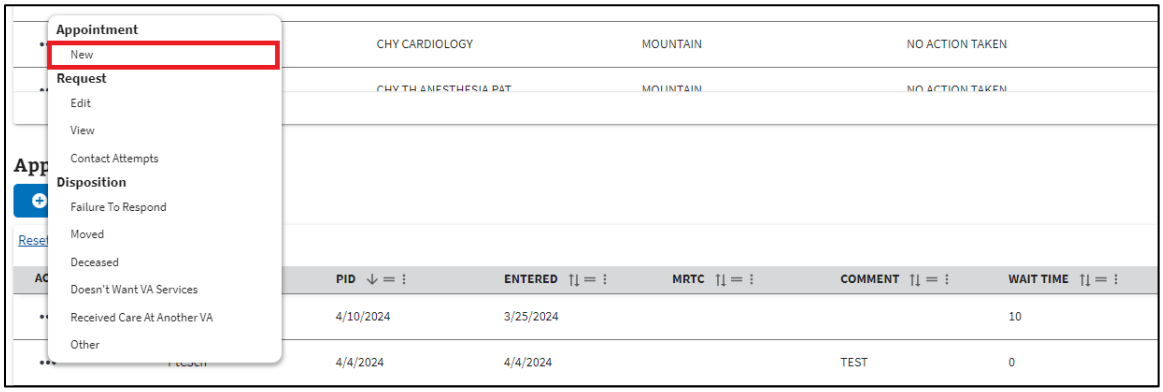


Figure 122: New Option from the Request Actions Dropdown for PtCSch

4. The user will be brought to the Schedule Search page shown below. On this page, the user can right click within the preferred timeslot on the calendar and select the "Create Appointment" option seen in **Figure 123**.

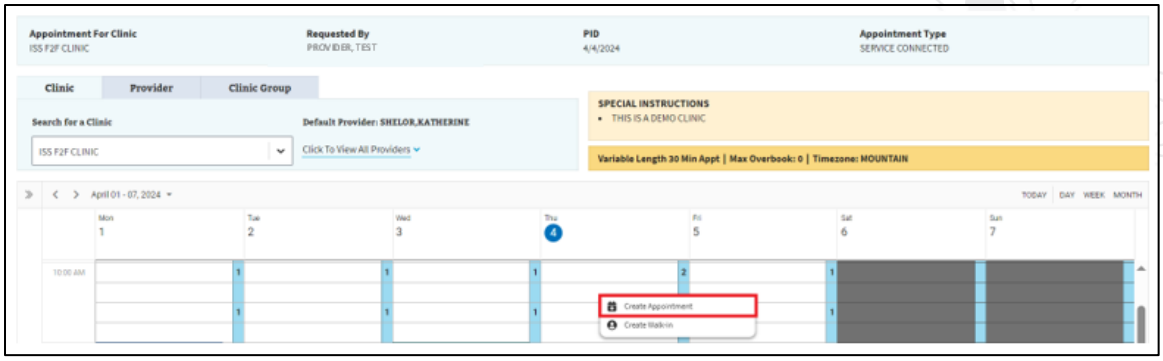


Figure 123: Create Appointment Button for PtCSch

5. The user will be brought to the New Appointment page. On this page, the user will need to fill out all the required information displayed in **Figure 124**. The user can also fill out any optional information as needed.

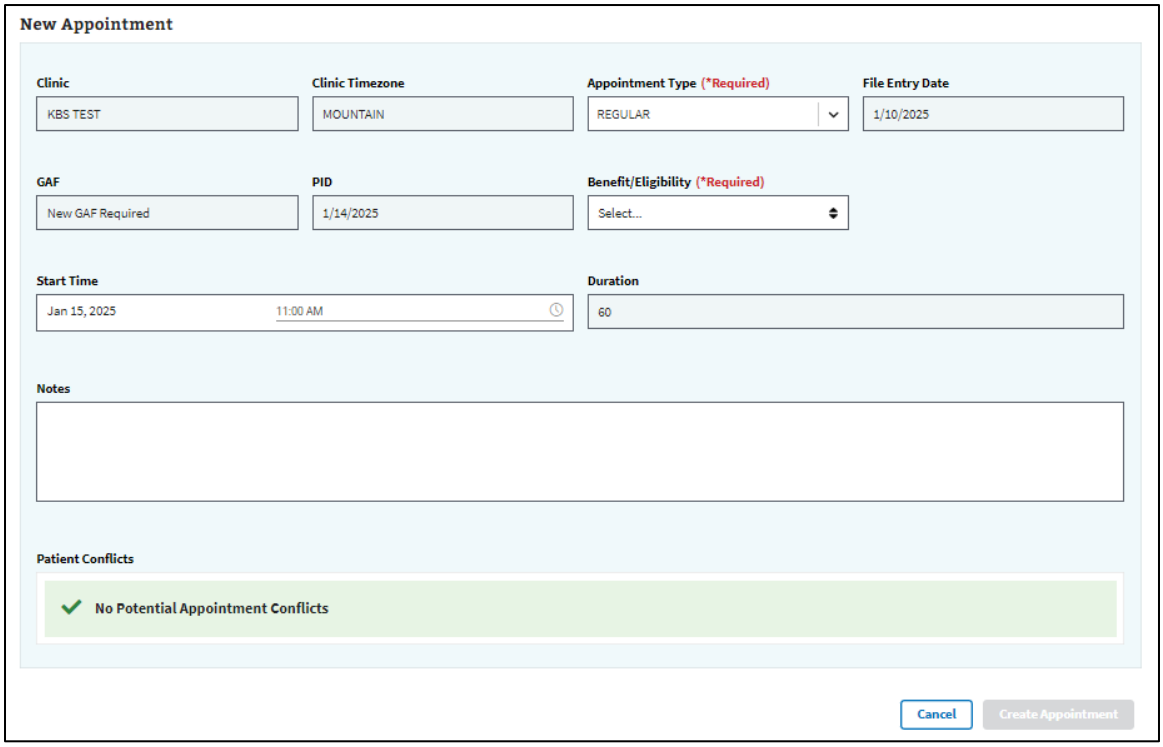


Figure 124: New Appointment Page for PtCSch

- ❖ *Note: Users will be able to track comments via the New Appointment page. Comments will show the name of the commenter, as well as the date the comment was added to the appointment request.*

6. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 125**, to create the new PtCSch appointment.

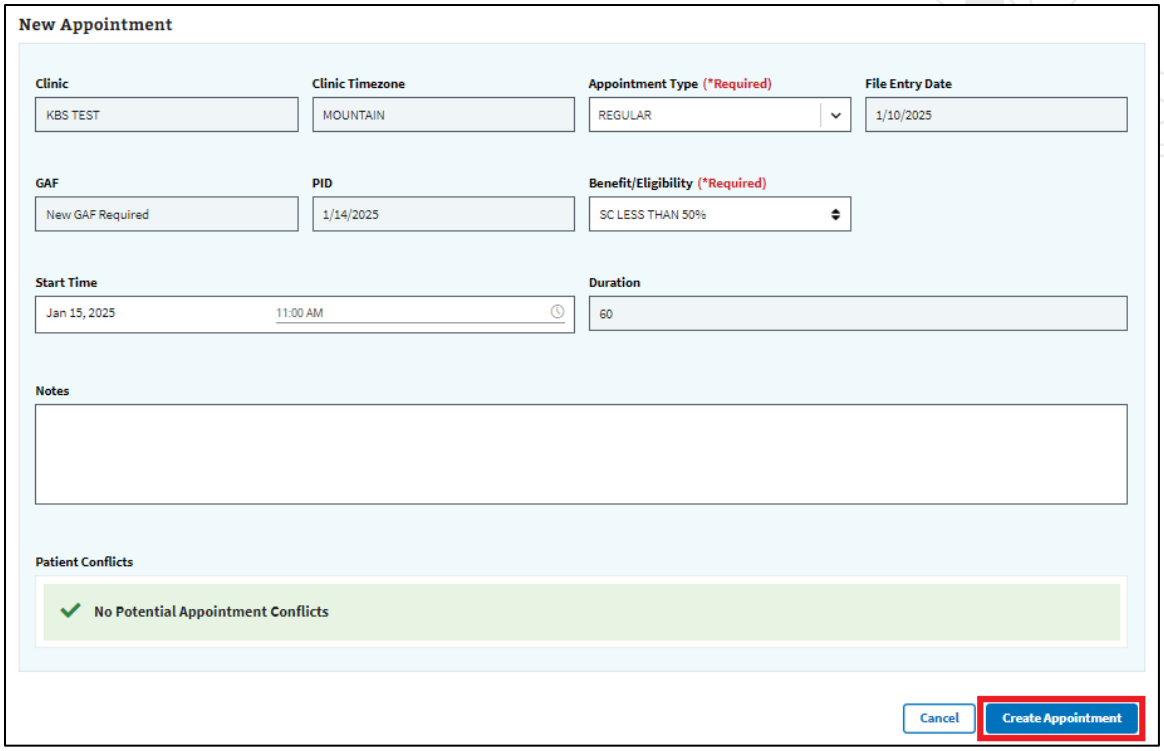


Figure 125: Create Appointment Button for New PtCSch

- ❖ *Note: The user can also select the "Cancel" button seen in **Figure 125** to exit creating an appointment and go back to the Appointments & Requests page.*

7. The Appointment Successfully Created window, shown below in **Figure 126**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

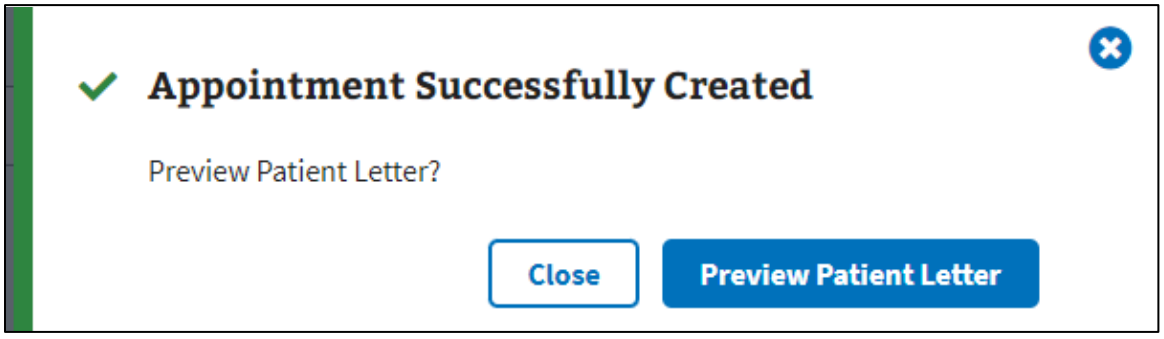


Figure 126: Preview Patient Letter Window for Creating PtCSch Appointment

4.3.3 MRTC

1. To create an MRTC appointment, the user will first need to locate an MRTC request created through CPRS, as seen in **Figure 127**, or follow the steps in **4.1.3 MRTC** to create a request through ISS.

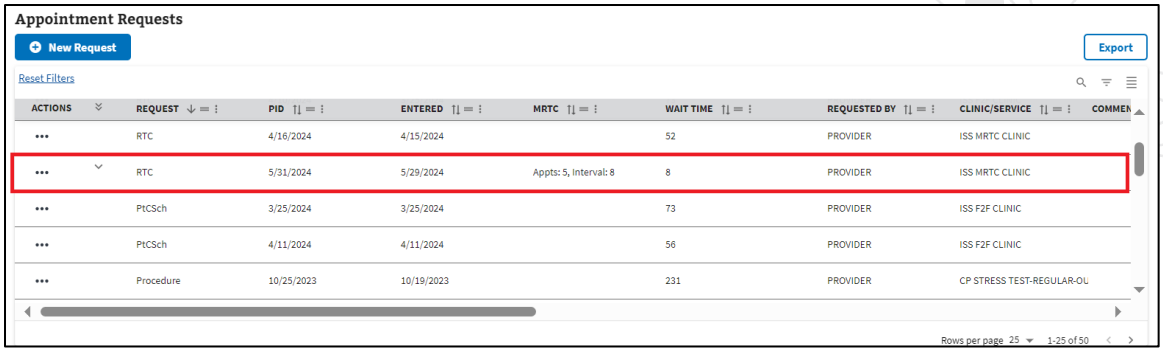


Figure 127: Example of CPRS MRTC in Grid

- ❖ *Note: MRTC requests created through CPRS will display as "RTC" in the Request column.*

2. After creating the appointment request, the user will select the ellipsis, seen in **Figure 128**, next to the request within the grid.

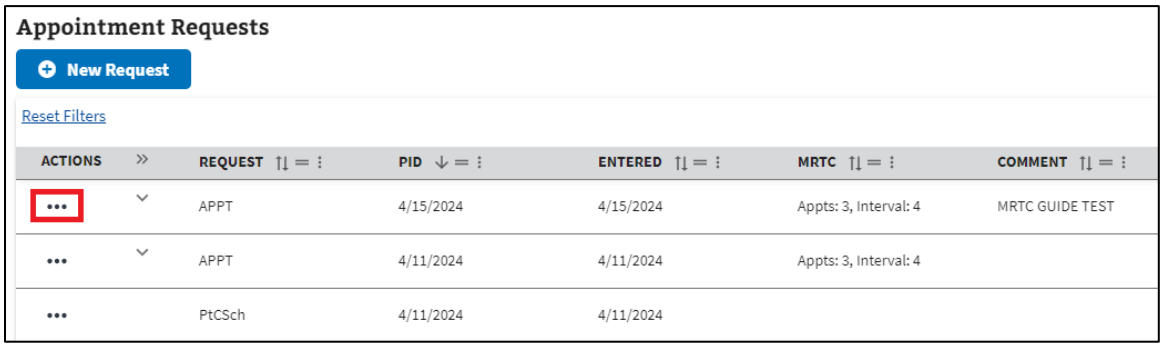


Figure 128: Selecting Action Menu Button to Create MRTC Appointment

- ❖ *Note: If the user would like to schedule a child request individually, simply expand the parent MRTC request and select the ellipsis next to the child request needed. The user can then follow the steps from **4.3.1 APPT** to create the appointment.*

3. This will cause the action menu to appear. The user will then need to select the "New" option, seen in **Figure 129**.

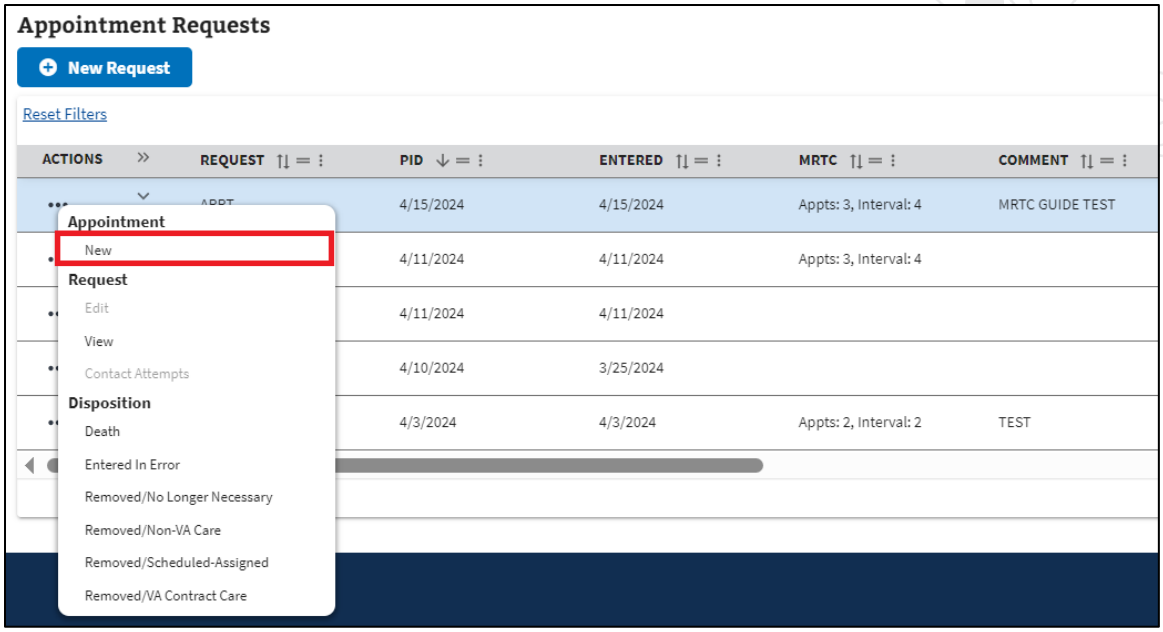


Figure 129: New Option from the Request Actions Dropdown for MRTC

4. The user will be brought to the New MRTC Appointment (1 of x) page. On this page, the user can right click within the preferred timeslot on the calendar and select the "Create MRTC Appointment (1 of x)" option seen in **Figure 130**.

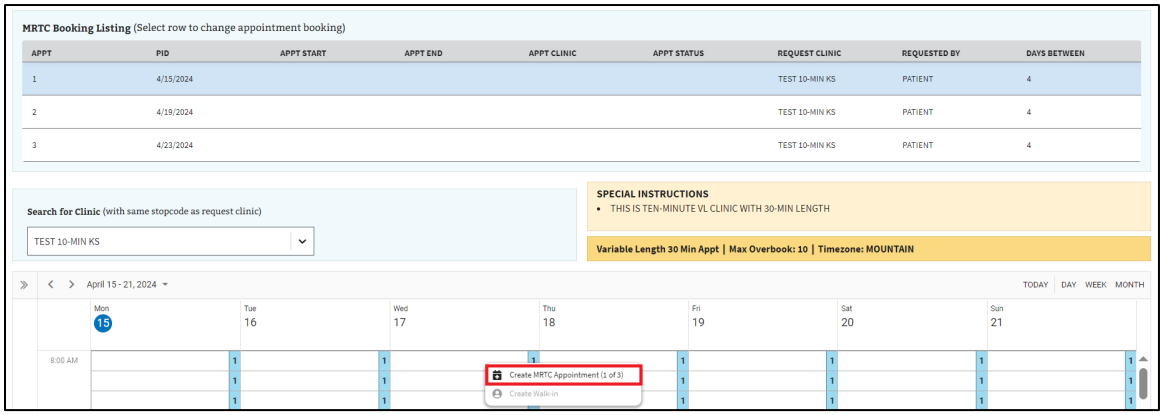


Figure 130: Create Appointment Button for MRTC

5. The user will be brought to the New Appointment page. On this page, the user will need to fill out all the required information displayed in **Figure 131**. The user can also fill out any optional information as needed.

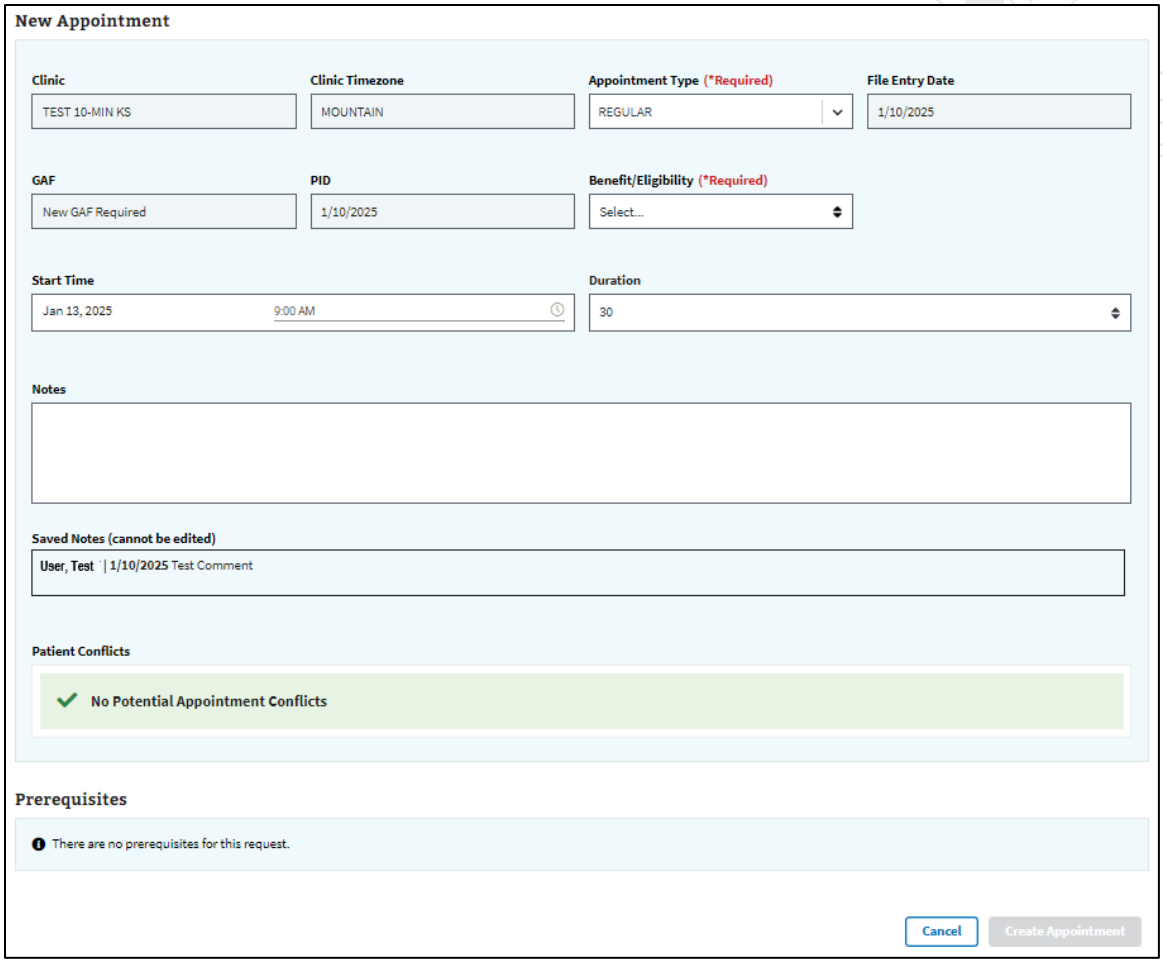


Figure 131: New Appointment Page for MRTC

- *Note: When creating an MRTC Appointment, the user may see prerequisites attached to the request, as seen below in **Figure 132**.*



Figure 132: Prerequisites Example for MRTC

- *Note: Users will be able to track comments via the New Appointment page. Comments will show the name of the commenter, as well as the date the comment was added to the appointment request.*

6. Once all applicable information has been filled, the user will select the “Create Appointment” button, seen in **Figure 133**, to create the new MRTC appointment.

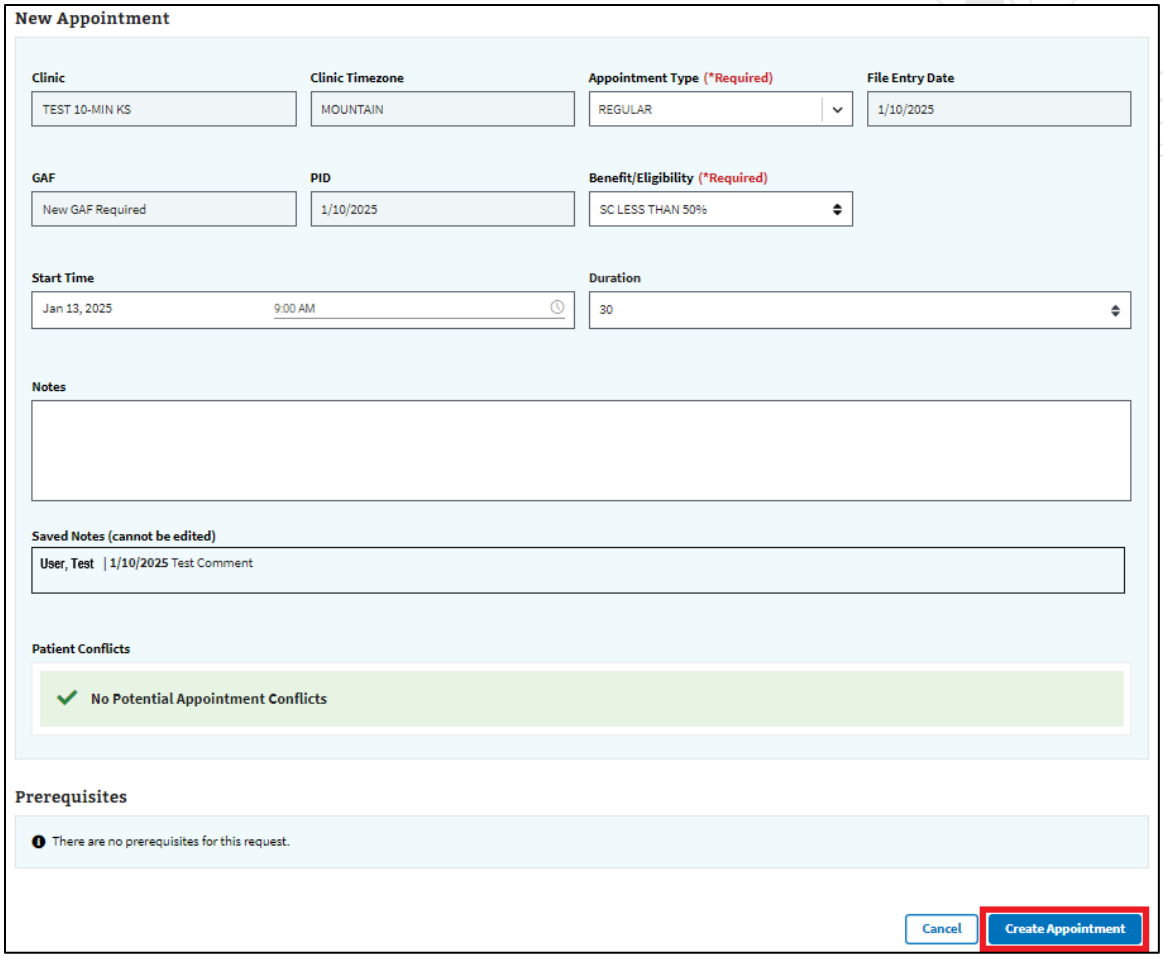


Figure 133: Create Appointment Button for New MRTC

- *Note: The user can also select the "Cancel" button seen in **Figure 133** to exit creating an appointment and go back to the Appointments & Requests page.*

7. The Appointment Successfully Created window, shown below in **Figure 134**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

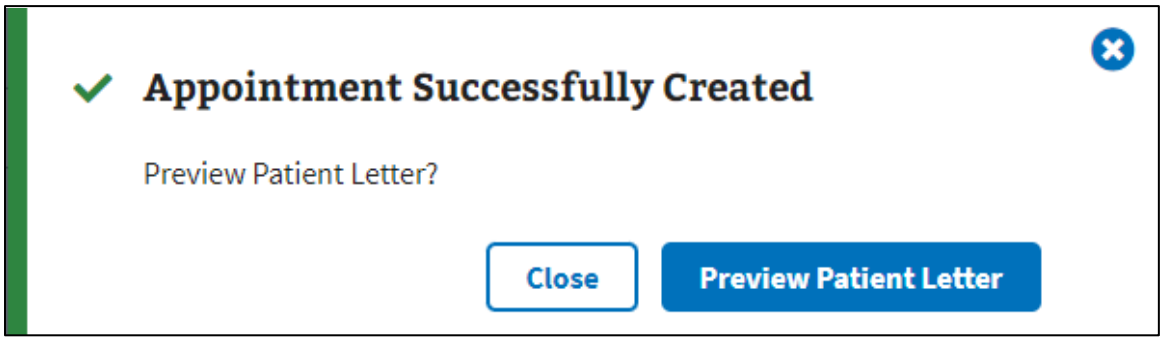


Figure 134: Preview Patient Letter Window for Creating MRTC Appointments

8. Once the appointment is created, the user will be brought back to the New MRTC Appointment page. From here, the user can follow steps 4-7 to create the other

appointments on the MRTC request or select close to exit and return to the Appointments & Requests page.

4.3.4 Consult/Procedure

1. To create a Consult/Procedure appointment, the user will need to locate any previously created Consult/Procedure requests by navigating the Appointment Requests grid (See **Figure 135** for an example.)

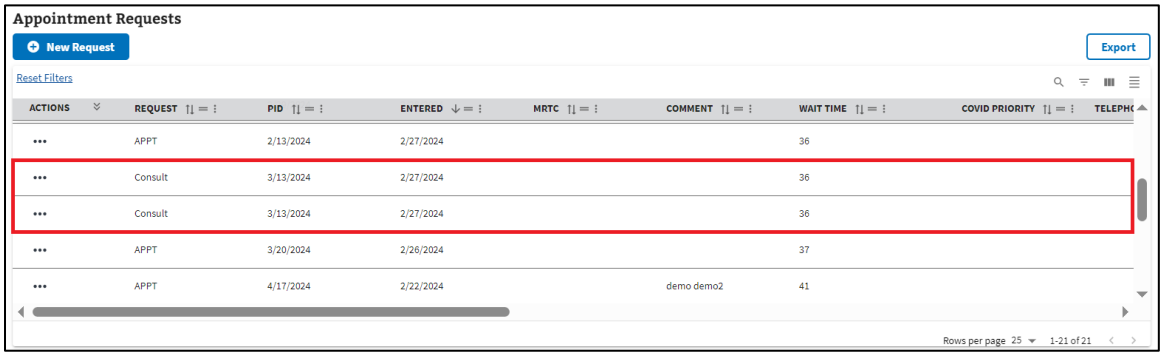


Figure 135: Example for Finding Consult/Procedure Requests

2. Once the consult/procedure request is located, the user will select the ellipsis, seen in **Figure 136**, next to the request within the grid.

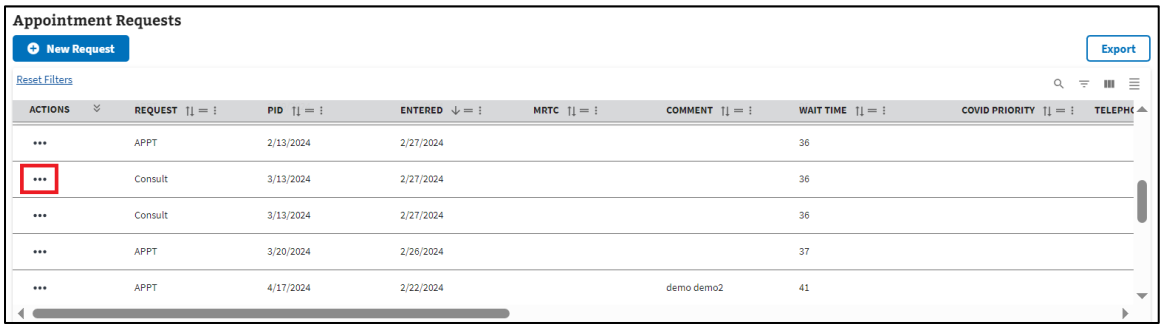


Figure 136: Selecting Action Menu Button to Create Consult/Procedure Appointment

3. This will cause the action menu to appear. The user will then need to select the “New” option, seen in **Figure 137**.

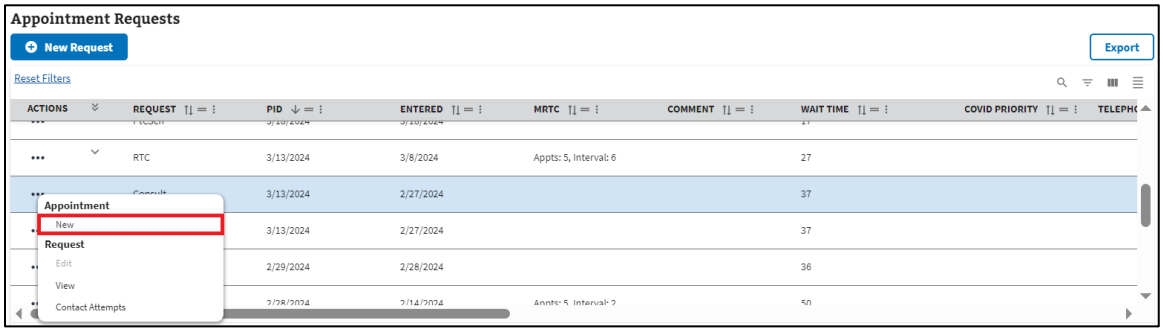


Figure 137: New Option from the Request Actions Dropdown for Consult/Procedure

4. The user will be brought to the Schedule Search page shown below. To search for a clinic, the user will select the search bar, seen in **Figure 138**, and enter a valid clinic name. Once the information has been entered, a list of clinics will appear in the dropdown.

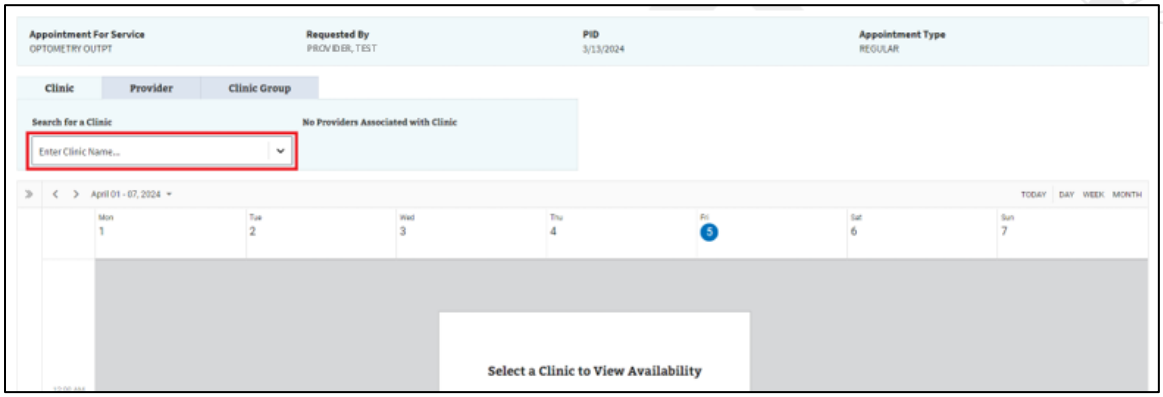


Figure 138: Searching for a Clinic when Creating a Consult/Procedure Appointment

- ❖ *Note: It is suggested that the user searches for a clinic within the service/specialty of the original appointment request. Attempting to use a clinic outside of the service/specialty in the request will result in the Clinic Stop Code notification seen in **Figure 139** below.*

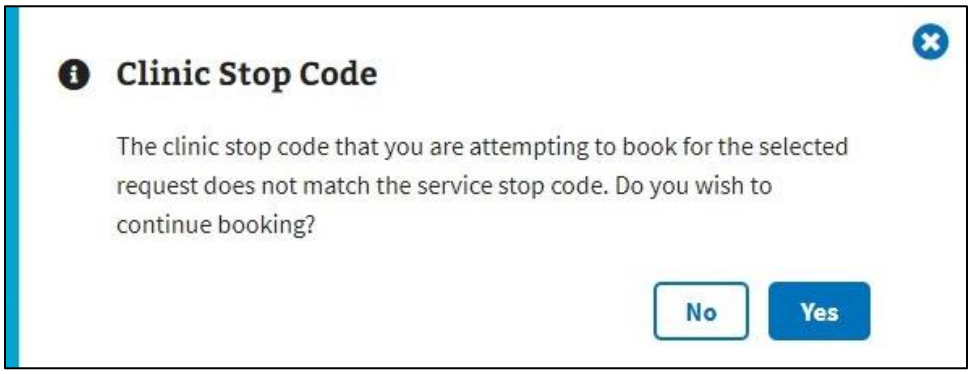


Figure 139: Clinic Stop Code Window for Consult/Procedure

5. After selecting a preferred clinic from the available options, the user will be brought to the Time Slot Calendar for the selected clinic. The user can then right click within the preferred timeslot on the calendar and select the “Create Appointment” option seen in **Figure 140**.

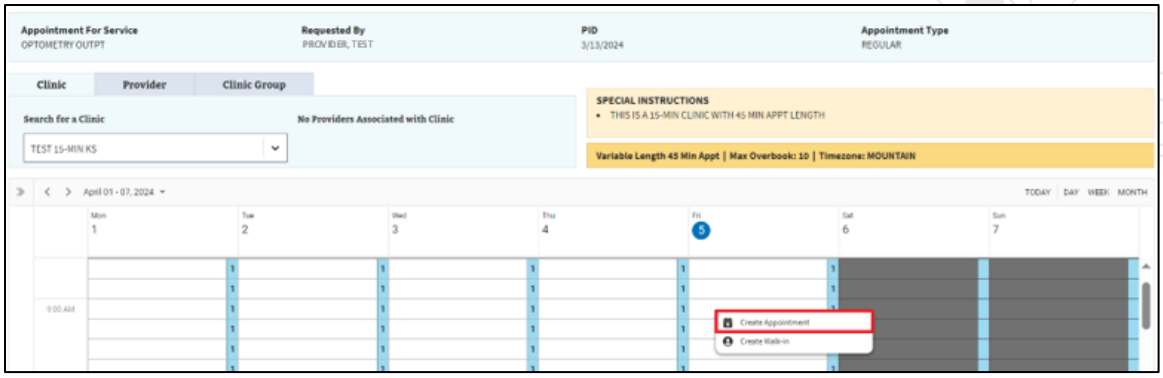


Figure 140: Create Appointment Button for Consult/Procedure

6. The user will be brought to the New Appointment page. On this page, the user will need to fill out all the required information displayed in **Figure 141**. The user can also fill out any optional information as needed.

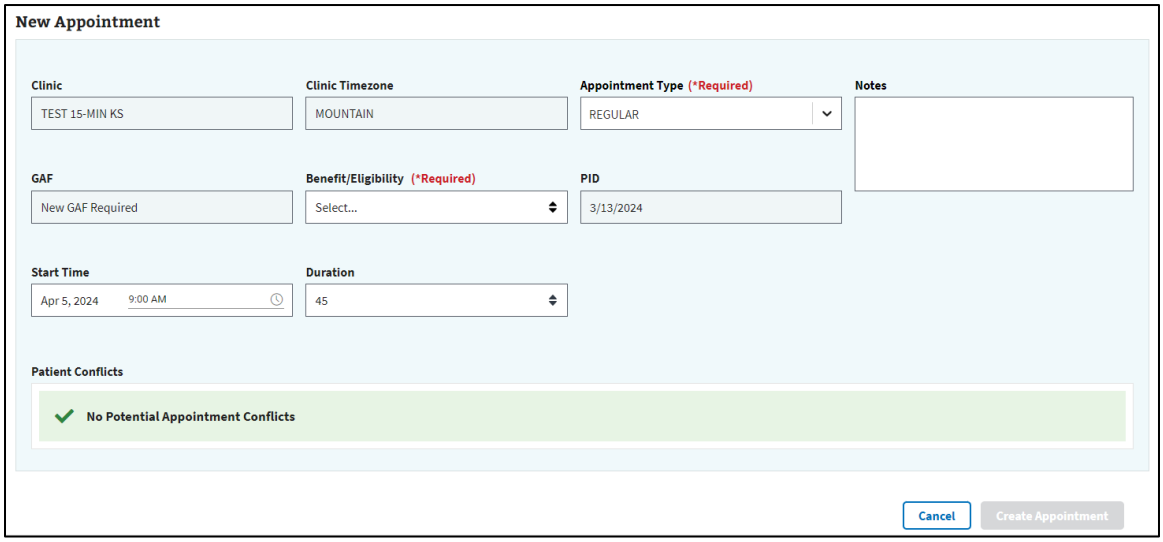


Figure 141: New Appointment Page for Consult/Procedure

- ❖ *Note: Users will be able to track comments via the New Appointment page. Comments will show the name of the commenter, as well as the date the comment was added to the appointment request.*

7. Once all applicable information has been filled, the user will select the “Create Appointment” button, seen in **Figure 142**, to create the new Consult/Procedure appointment.

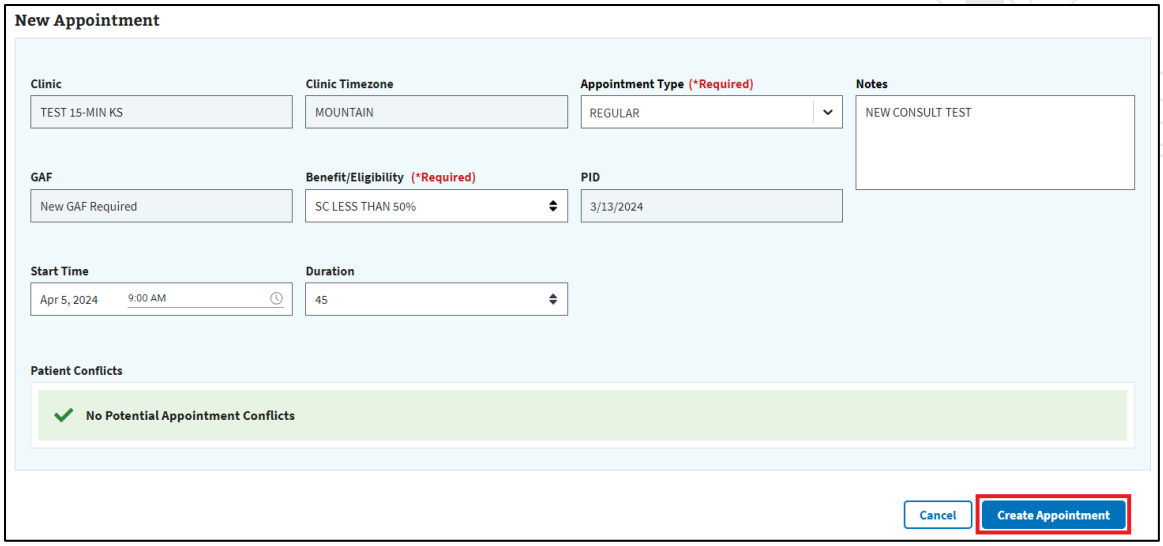


Figure 142: Create Appointment Button for New Consult/Procedure

- *Note: The user can also select the "Cancel" button seen in **Figure 142** to exit creating an appointment and go back to the Appointments & Requests page.*

8. The Appointment Successfully Created window, shown below in **Figure 143**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

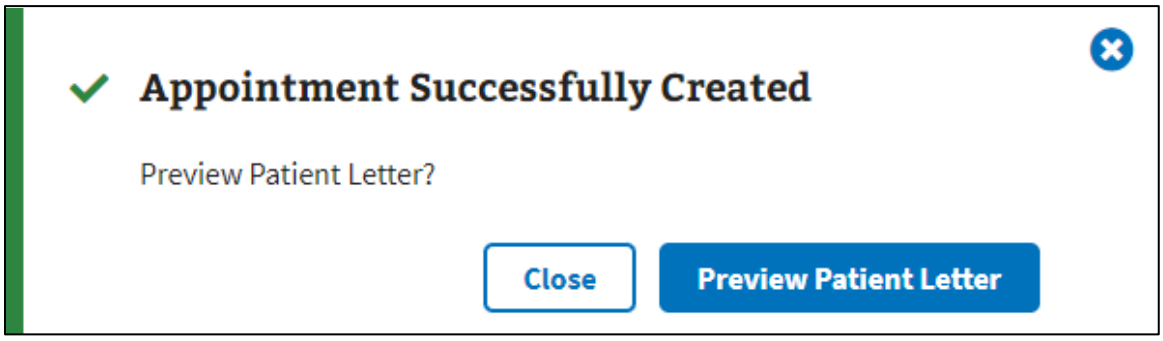


Figure 143: Preview Patient Letter Window for Creating Consult/Procedure Appointment

4.3.5 RTC

1. To create a RTC appointment, the user will need to locate any previously created RTC requests by navigating the Appointment Requests grid (See **Figure 144** for an example.)

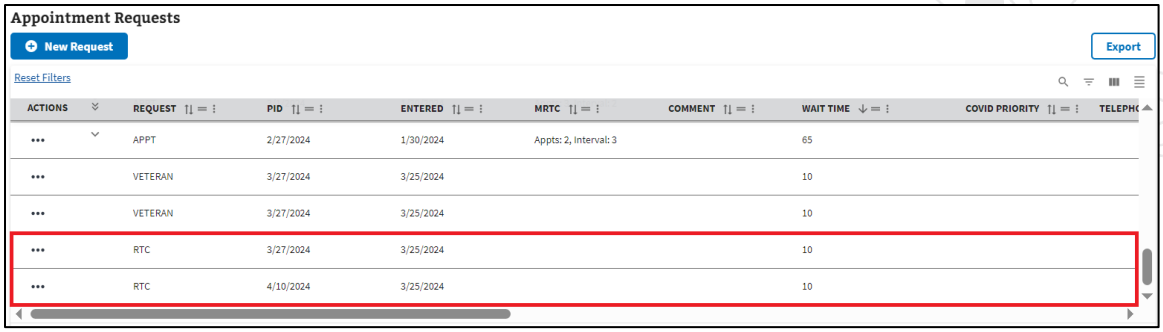


Figure 144: Example for Finding RTC Requests

2. Once the RTC request is located, the user will select the ellipsis, seen in **Figure 145**, next to the request within the grid.

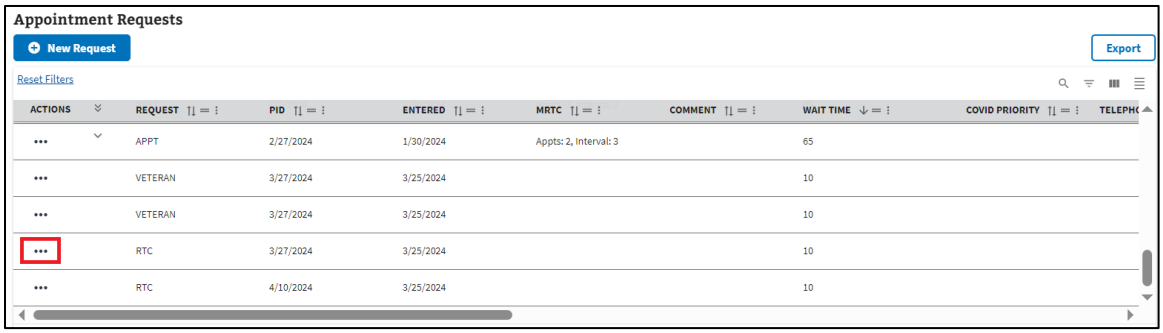


Figure 145: Selecting Action Menu Button to RTC Appointments

3. This will cause the action menu to appear. The user will then need to select the “New” option, seen in **Figure 146**.

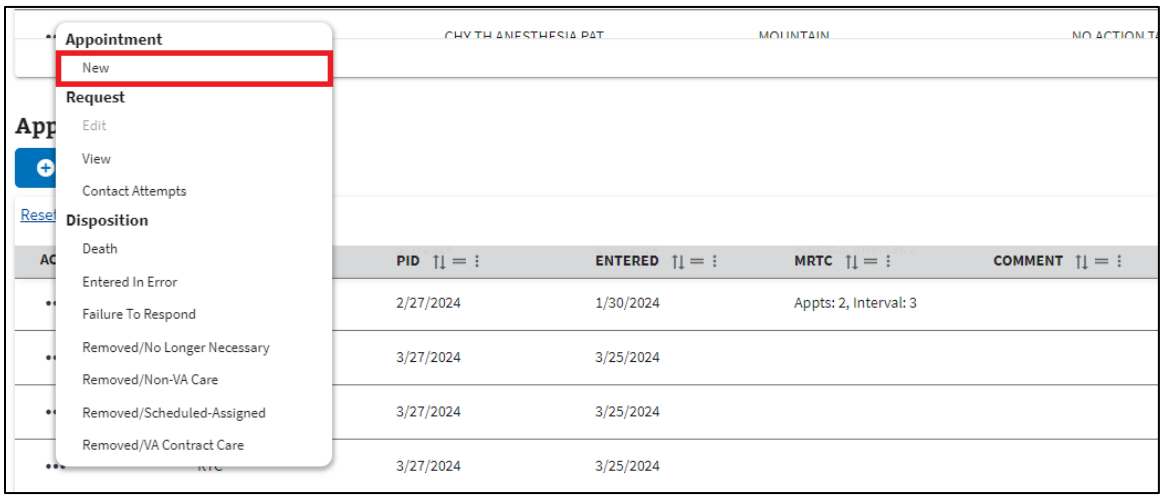


Figure 146: New Option from the Request Actions Dropdown for RTC

4. The user will be brought to the Schedule Search page shown below. On this page, the user can right click within the preferred timeslot on the calendar and select the “Create Appointment” option seen in **Figure 147**.

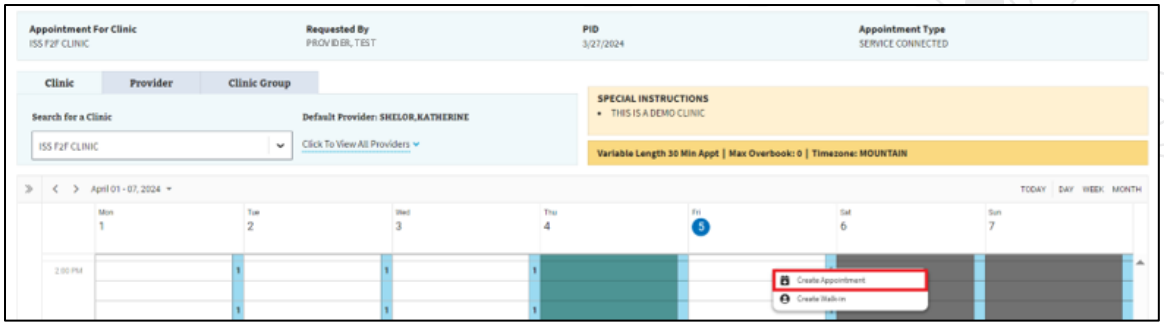


Figure 147: Create Appointment Button for RTC

5. The user will be brought to the New Appointment page. On this page, the user will need to fill out all the required information displayed in **Figure 148**. The user can also fill out any optional information as needed.

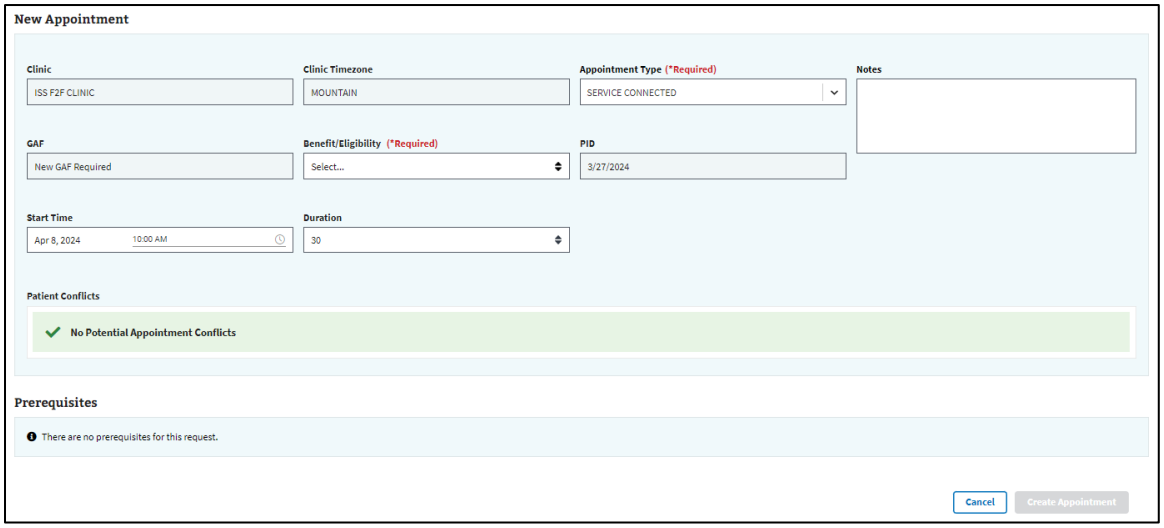


Figure 148: New Appointment for RTC

- *Note: When creating an RTC Appointment, the user may see prerequisites attached to the request, as seen below in **Figure 149**.*



Figure 149: Prerequisites Example for RTC

- *Note: Users will be able to track comments via the New Appointment page. Comments will show the name of the commenter, as well as the date the comment was added to the appointment request.*

6. Once all applicable information has been filled, the user will select the “Create Appointment” button, seen in **Figure 150**, to create the new RTC appointment.

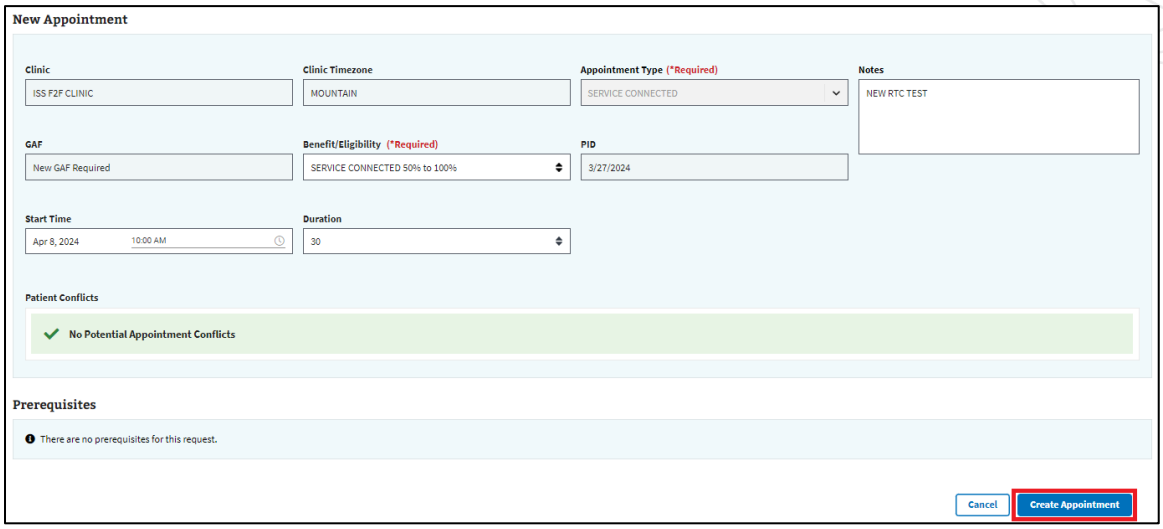


Figure 150: Create Appointment Button for Creating RTC Appointments

- *Note: The user can also select the “Cancel” button seen in **Figure 150** to exit creating an appointment and go back to the Appointments & Requests page.*

7. The Appointment Successfully Created window, shown below in **Figure 151**, will appear. The user can choose to preview the patient letter, if needed, or select “Close” to continue.

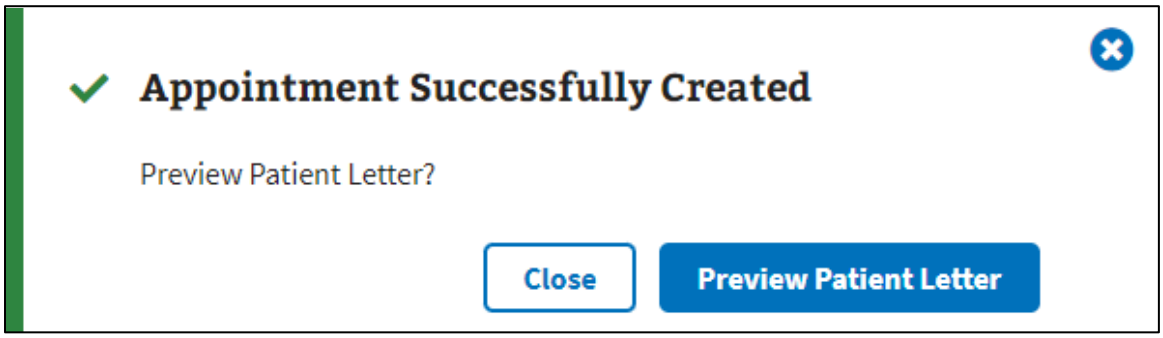


Figure 151: Preview Patient Letter Window for Creating RTC Appointments

4.3.6 VETERAN

1. To create a VETERAN appointment, the user will need to locate any previously created VETERAN requests by navigating the Appointment Requests grid (See **Figure 152** an example.)

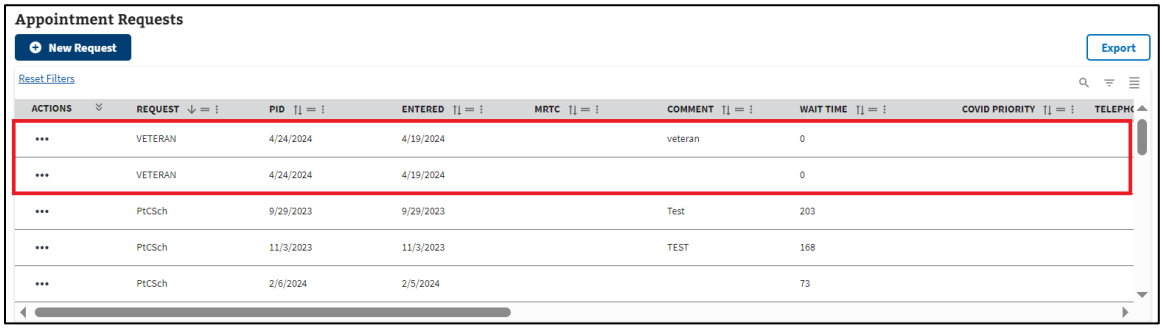


Figure 152: Example for Finding VETERAN Requests

2. Once the VETERAN request is located, the user will select the ellipsis, seen in **Figure 153**, next to the request within the grid.

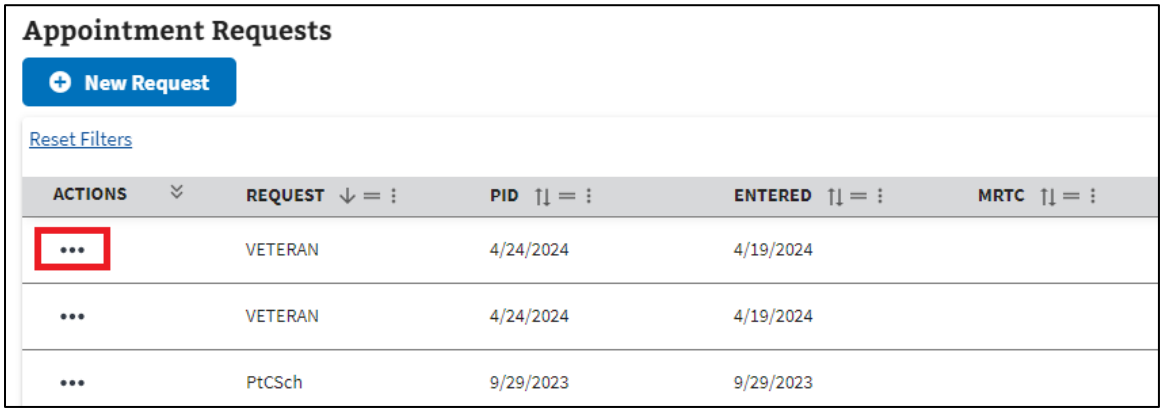


Figure 153: Selecting Action Menu Button to VETERAN Appointments

3. This will cause the action menu to appear. The user will then need to select the “New” option, seen in **Figure 154**.

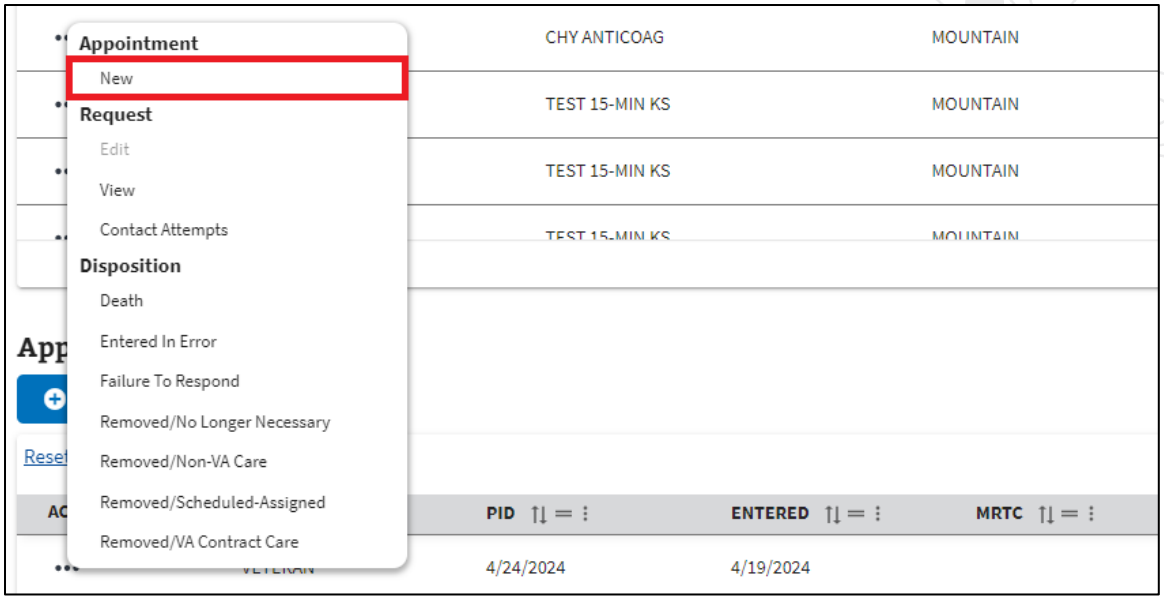


Figure 154: New Option from the Request Actions Dropdown for VETERAN

4. The user will be brought to the Schedule Search page shown below. To search for a clinic, the user will select the search bar, seen in **Figure 155**, and enter a valid clinic name. Once the information has been entered, a list of clinics will appear in the dropdown.

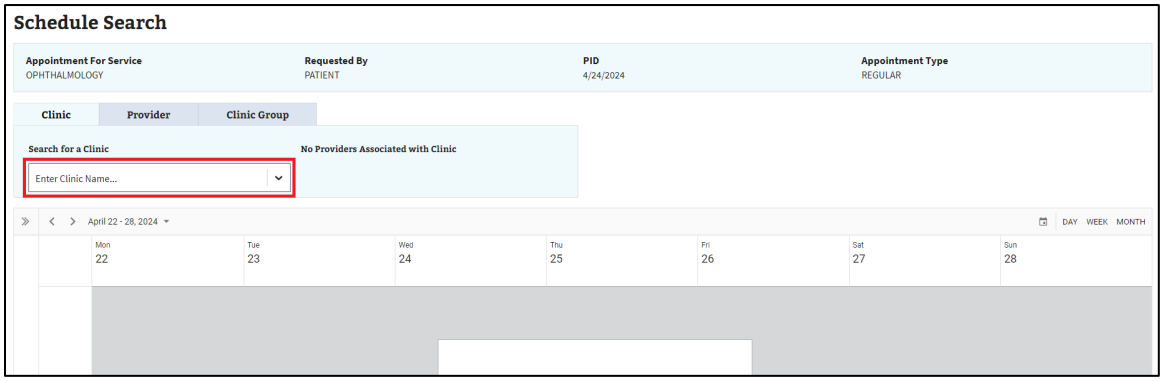


Figure 155: Searching for a Clinic when Creating a VETERAN Appointment

- ❖ *Note: It is suggested that the user searches for a clinic within the service/specialty of the original appointment request. Attempting to use a clinic outside of the service/specialty in the request will result in the Clinic Stop Code notification seen in **Figure 156** below.*

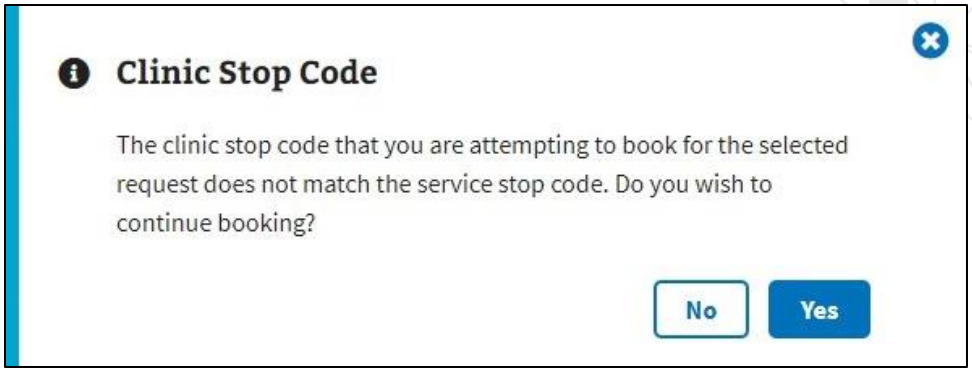


Figure 156: Clinic Stop Code Window for VETERAN Appointments

5. After selecting a preferred clinic from the available options, the user will be brought to the Time Slot Calendar for the selected clinic. The user can then right click within the preferred timeslot on the calendar and select the "Create Appointment" option seen in **Figure 157**.

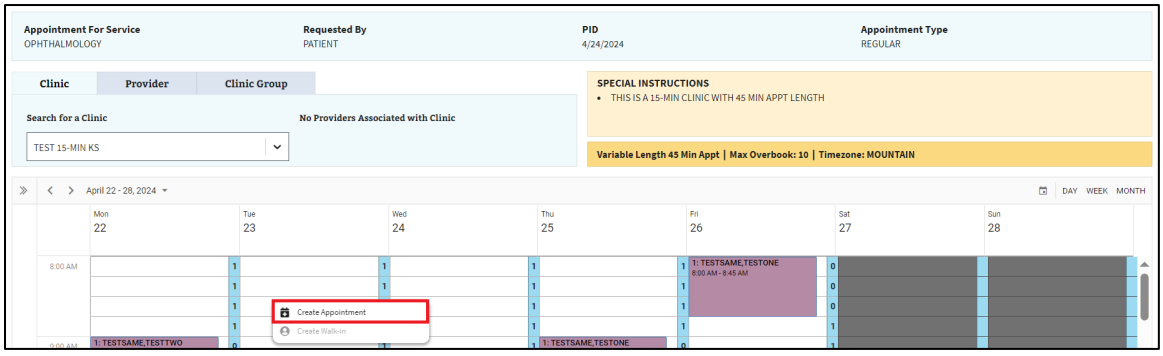


Figure 157: Create Appointment Button for VETERAN

6. The user will be brought to the New Appointment page. On this page, the user will need to fill out all the required information displayed in **Figure 158**. The user can also fill out any optional information as needed.

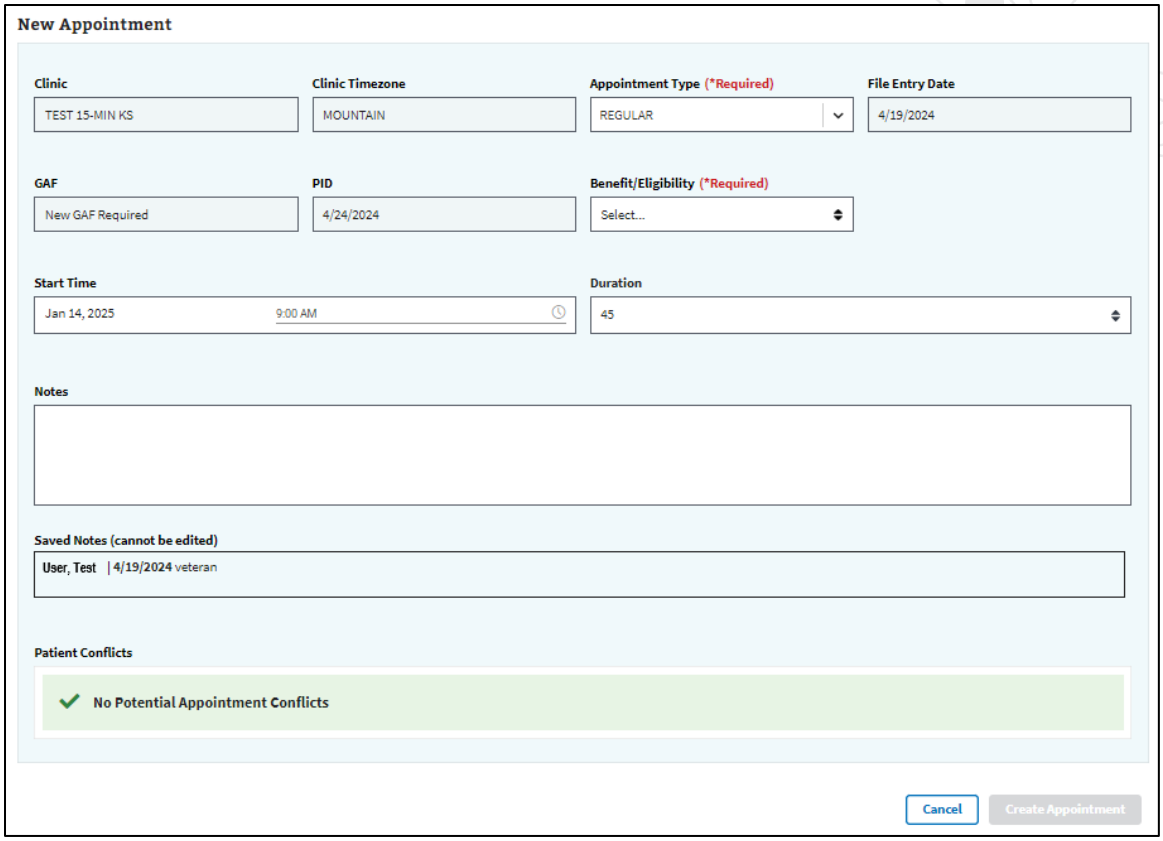


Figure 158: New Appointment Page for VETERAN

- ❖ *Note: Users will be able to track comments via the New Appointment page. Comments will show the name of the commenter, as well as the date the comment was added to the appointment request.*

7. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 159**, to create the new VETERAN appointment.

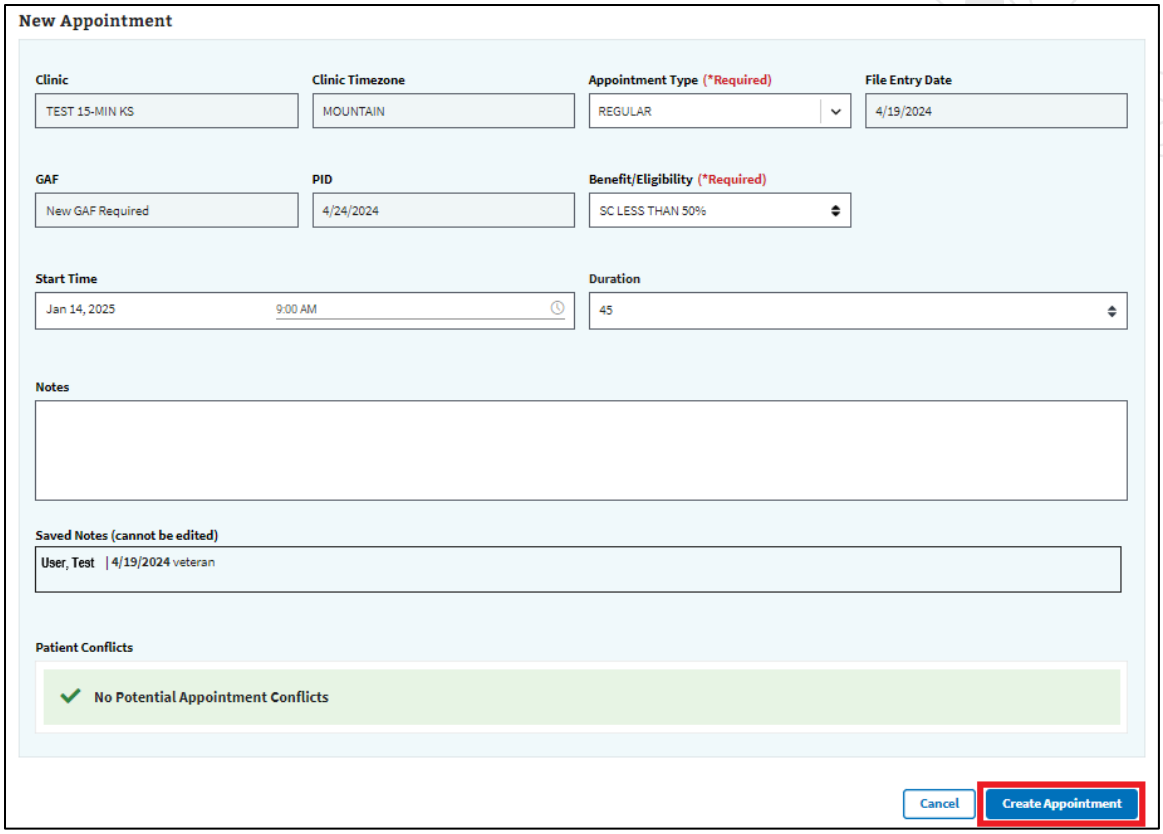


Figure 159: Create Appointment Button for Creating VETERAN Appointments

- *Note: The user can also select the "Cancel" button seen in **Figure 159** to exit creating an appointment and go back to the Appointments & Requests page.*

8. The Appointment Successfully Created window, shown below in **Figure 160**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

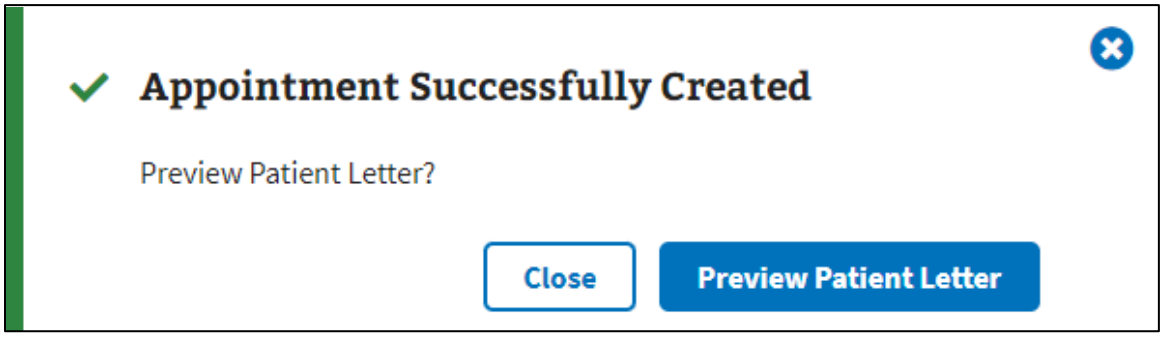


Figure 160: Preview Patient Letter Window for Creating VETERAN Appointments

4.3.7 Overbooking an Appointment

When creating appointments, users have the ability to overbook an appointment slot. To do so, the user will need to follow the steps outlined in **4.3 Creating a Pending Appointment** until asked to select a timeslot on the clinic calendar.

1. To overbook an appointment slot, the user will right-click on the preferred timeslot on the calendar and select “Create Appointment (Overbooked),” as seen below in **Figure 161**.

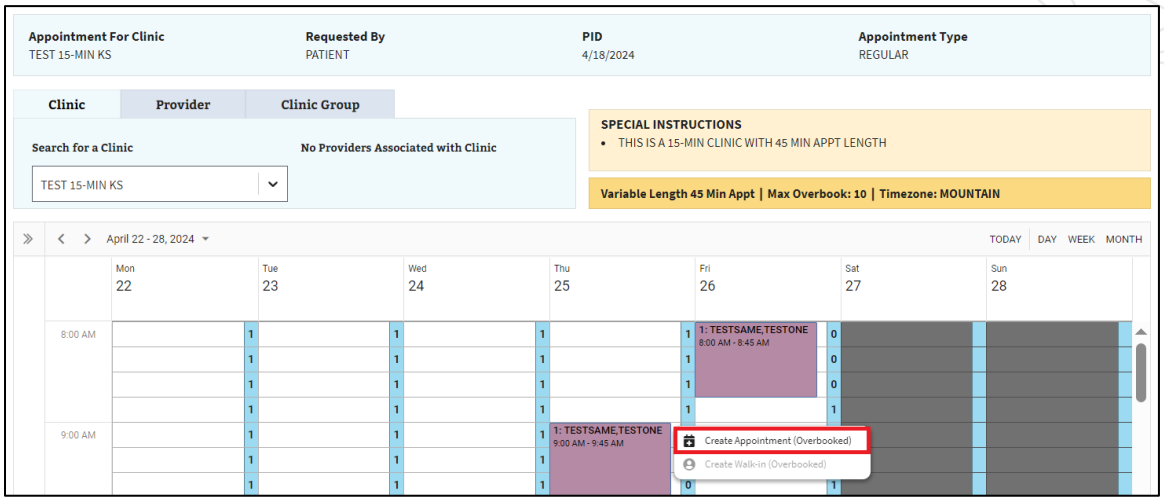


Figure 161: Create Appointment (Overbooked) Button

2. The Overbook Slot window will appear, as shown in **Figure 162**, and the user will be asked to confirm before proceeding with appointment creation as normal.

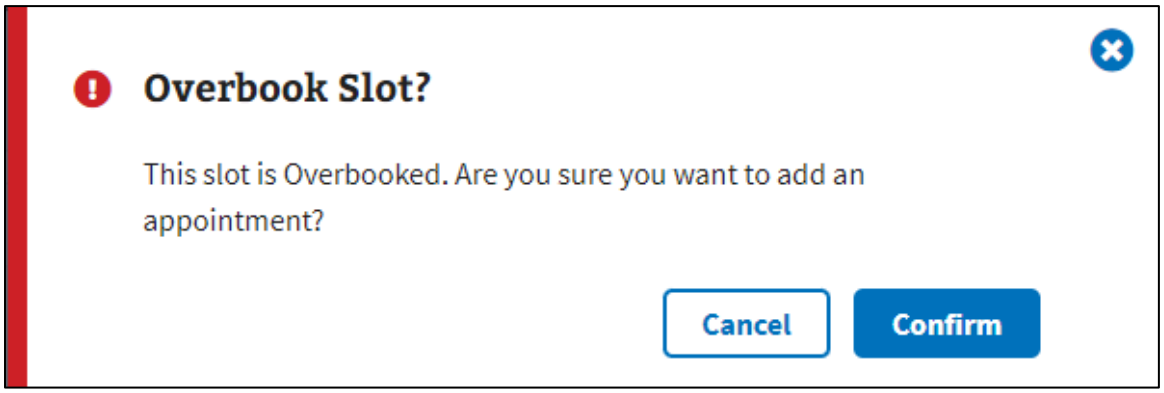


Figure 162: Overbook Slot Window

- ❖ *Note: Users with an SDOB key will only be able to overbook within clinic hours and up to the maximum number of overbooks allowed per day for a clinic. Users with an SDMOB key will be able to overbook outside of clinic hours and can exceed the maximum allotted overbooks slots per day for a clinic.*

4.3.8 MISSION Act

The user may receive an alert when creating an appointment if an appointment is MISSION Act eligible. For more information regarding MISSION Act, please visit this link.

4.3.9 Clinic Stop Code

The user will receive a clinic stop code notification if an appointment is being created in a clinic that is not within the service/specialty of the appointment request.

4.3.10 Patient Conflicts

When creating an appointment, the user will see a Patient Conflict notification at the bottom of the New Appointment page. If no conflict exists, the notification will display “No Potential Appointment Conflicts” in green, as shown in **Figure 163**, and the user can move forward with creating the appointment as usual.

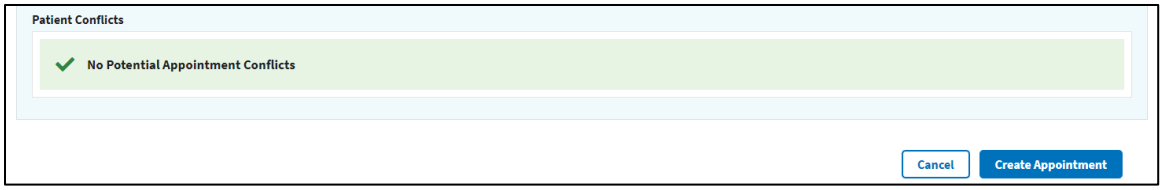


Figure 163: No Potential Appointment Conflicts Notification

If the user attempts to make more than one appointment for a patient on the same day at any clinic, the notification will display “Potential Patient Conflict for [DAY]” in yellow and show the potential conflicting appointment(s) in a grid, as seen below in **Figure 164**. The user can then choose to continue making the appointment for the patient or go back and choose a different day and time.

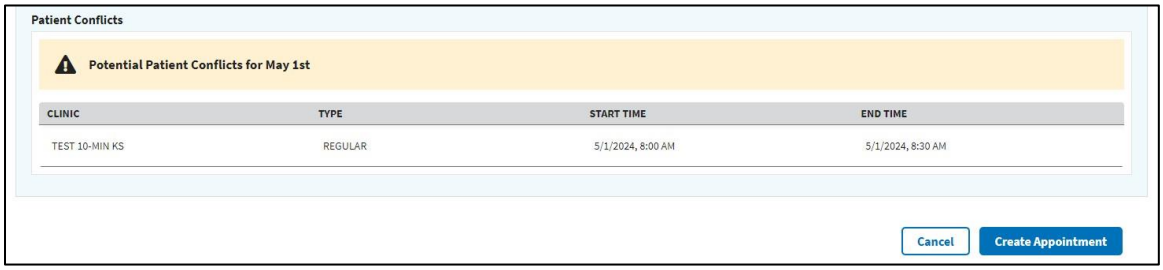


Figure 164: Potential Appointment Conflicts Notification

From the clinic calendar, the calendar will display the “Create Appointment” button as greyed out and unavailable when attempting to create an appointment with a known conflict (See **Figure 165** below).

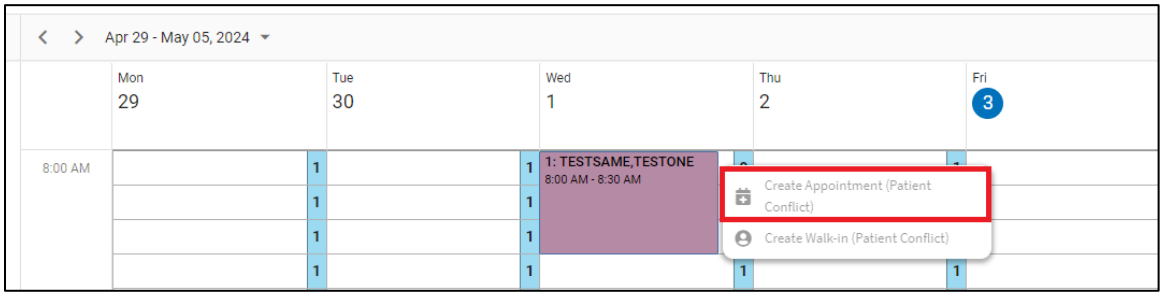


Figure 165: Patient Conflict on Calendar

If the user changes the time to one with a patient conflict on the New Appointment page, the notification will display “This Time Has the Conflict Highlighted Below:” in red and show the conflicting appointment in a grid, as seen below in **Figure 166**.



Figure 166: Patient Conflict on New Appointment Page

- *Note: The user will be unable to create an appointment with a Patient Conflict displayed in red.*

4.4 Appointment Actions

4.4.1 View

1. To view an appointment, the user will select the ellipsis, seen in **Figure 167**, next to the appointment within the Pending grid under Appointments.

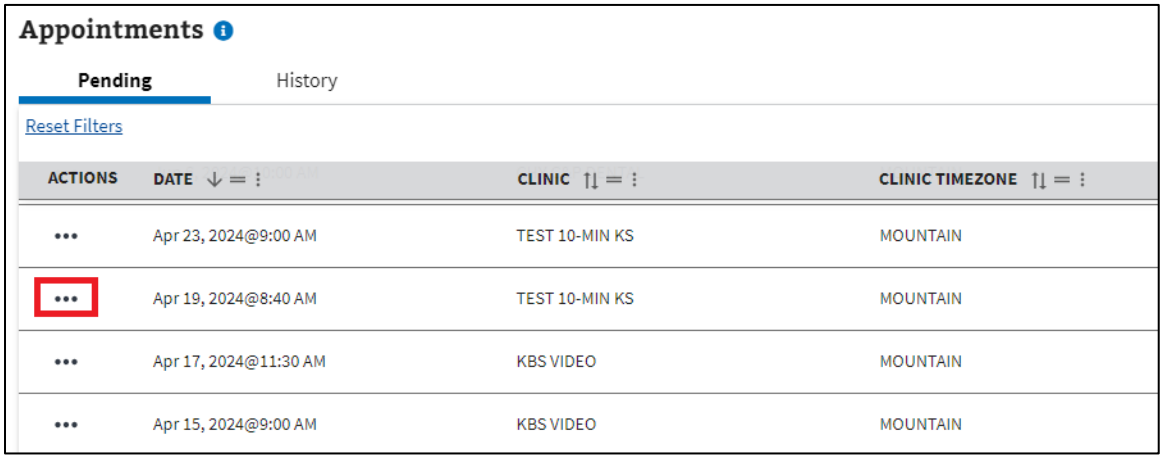


Figure 167: Action Menu Button to View Appointments

2. This will cause the action menu to appear. The user will then need to select the “View” option, seen in **Figure 168**.

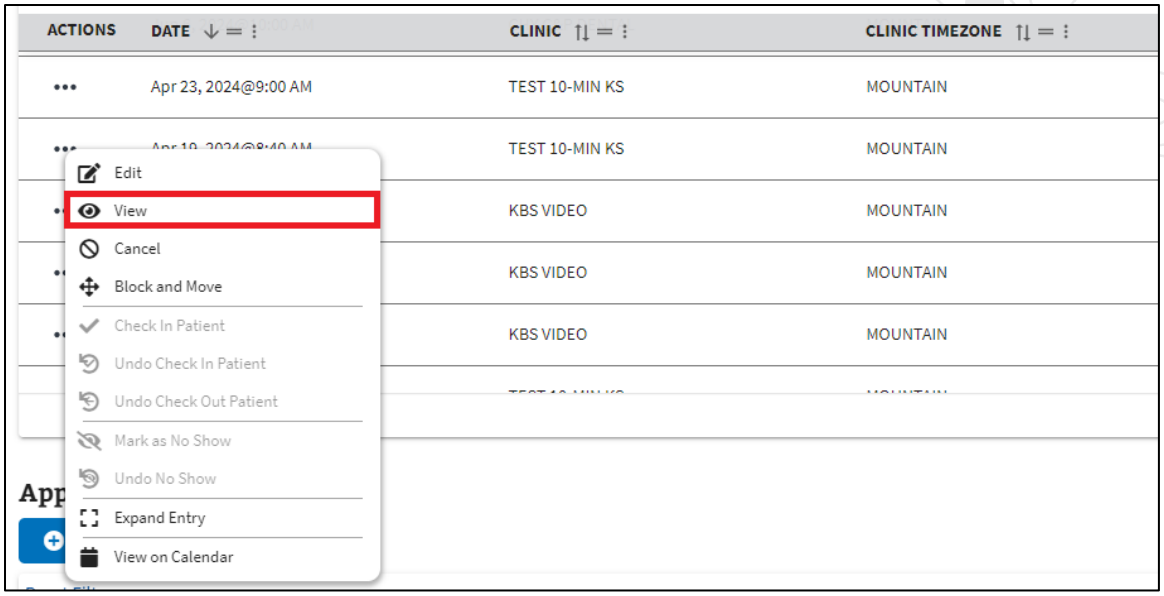


Figure 168: View Option from Pending Appointments Action Menu

3. The user will be brought to the View Appointment page, shown below in **Figure 169**.

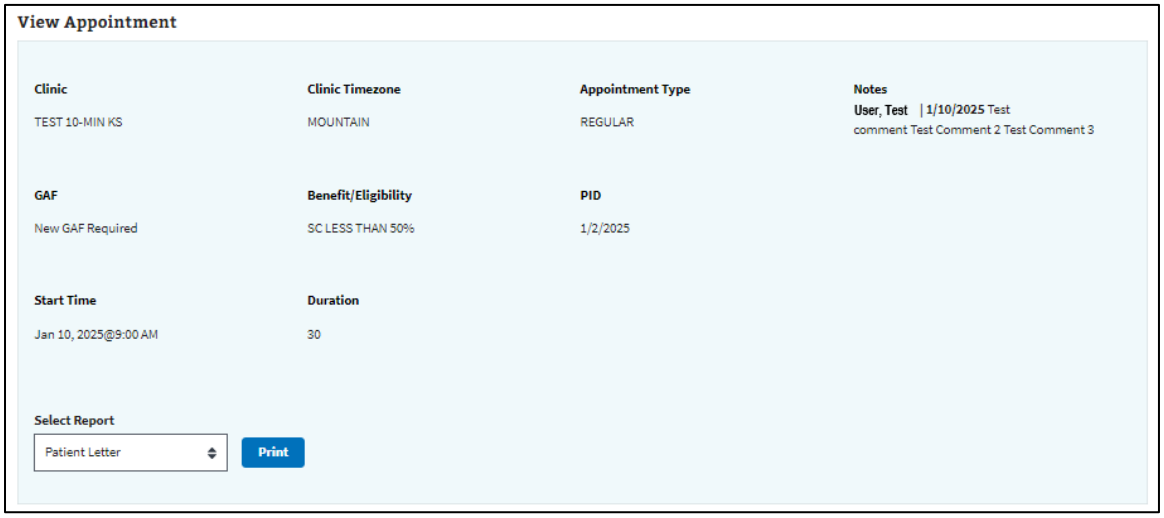


Figure 169: View Appointment Page

- *Note: Users will be able to track comments via the View page. Comments will show the name of the commenter, as well as the date the comment was added to the appointment (see **Figure 169** for example).*
- *Note: The user has the ability to print a patient letter by selecting the "Print" button seen in **Figure 170**.*

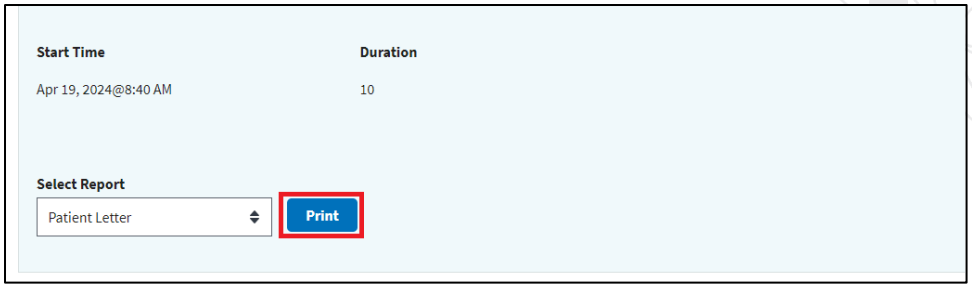


Figure 170: Print Patient Letter Button from View Appointment Page

4.4.2 Edit

1. To edit an appointment, the user will select the ellipsis, seen in **Figure 171**, next to the appointment within the Pending grid under Appointments.

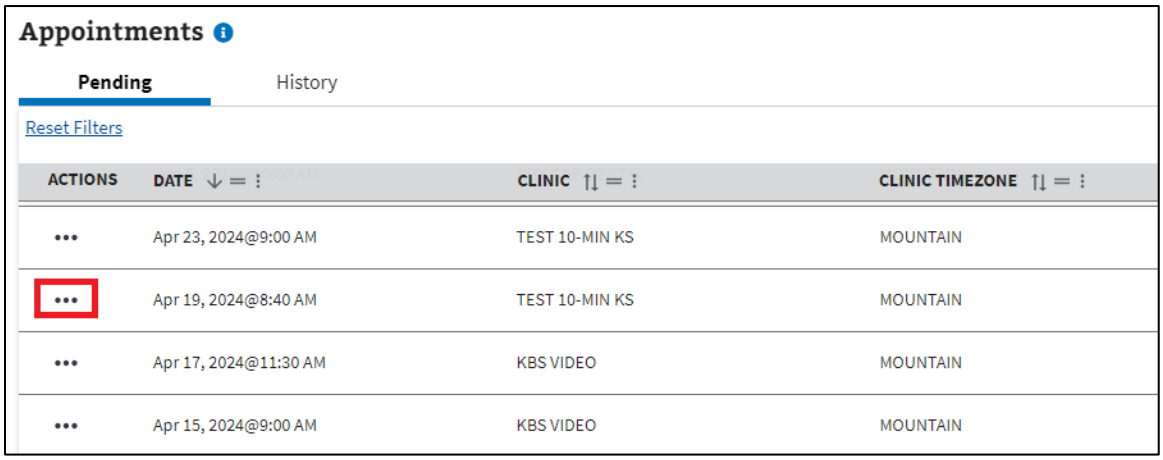


Figure 171: Action Menu Button to Edit Appointments

2. This will cause the action menu to appear. The user will then need to select the “Edit” option, seen in **Figure 172**.

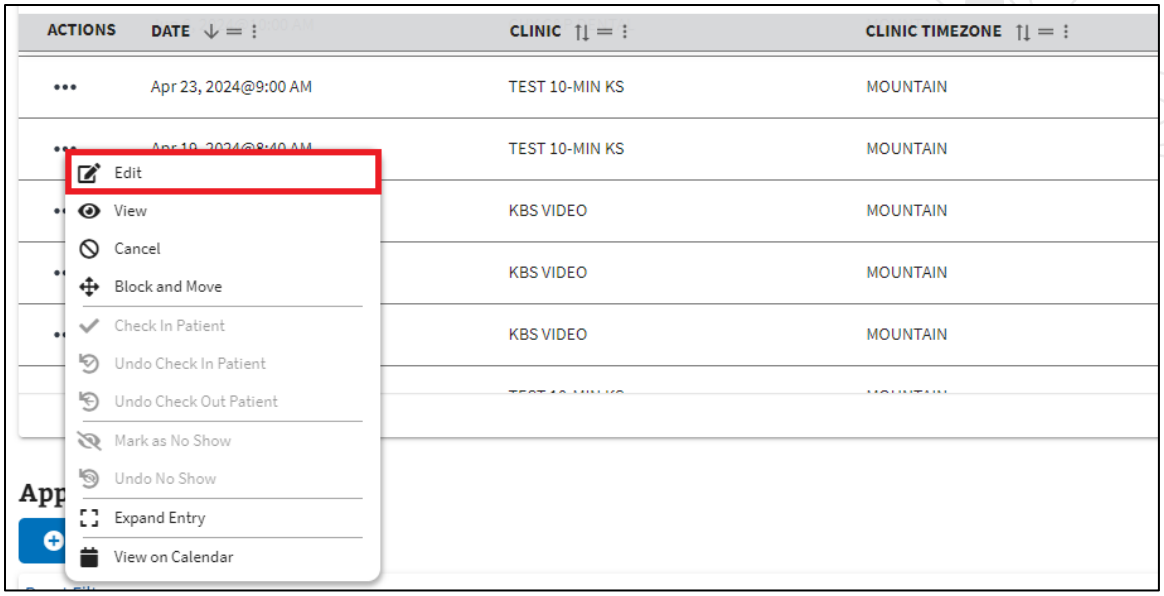


Figure 172: Edit Option from the Pending Appointments Action Menu

3. The user will be brought to the Edit Appointment page. On this page, the user can edit any of the fields highlighted below in **Figure 173**.

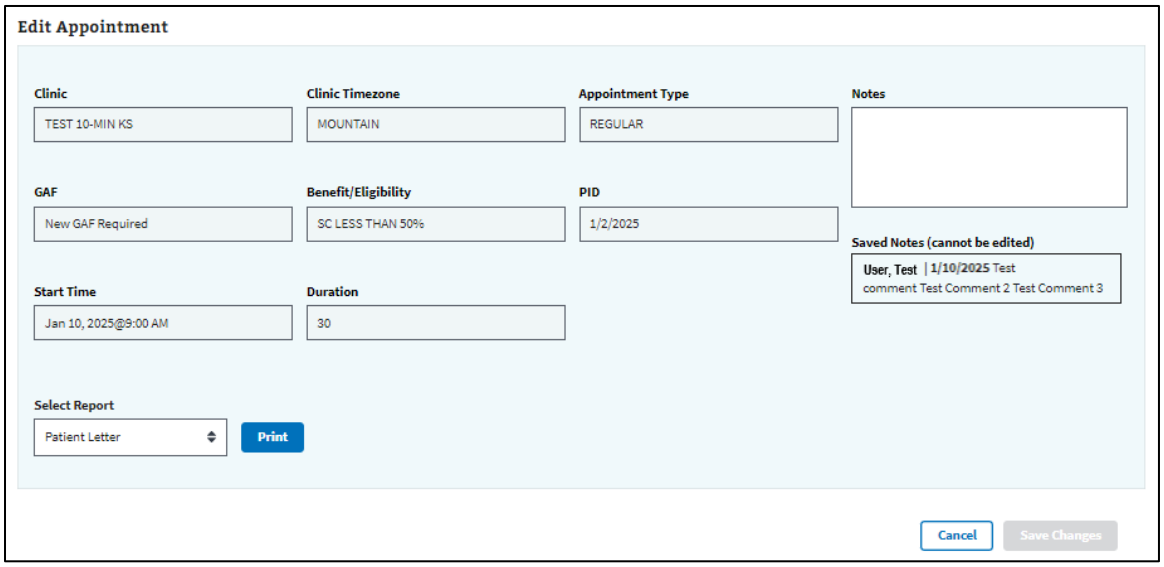


Figure 173: Edit Appointment Page

- ❖ *Note: Users can add additional comments to an appointment, as well as track previous comments via the Edit page. Previous comments will show the name of the commenter and the date the comment was added (see **Figure 173** for example).*

4. Once all edits have been made, the user will need to select the "Save Changes" button, seen in **Figure 174**, to save any edits to the appointment.

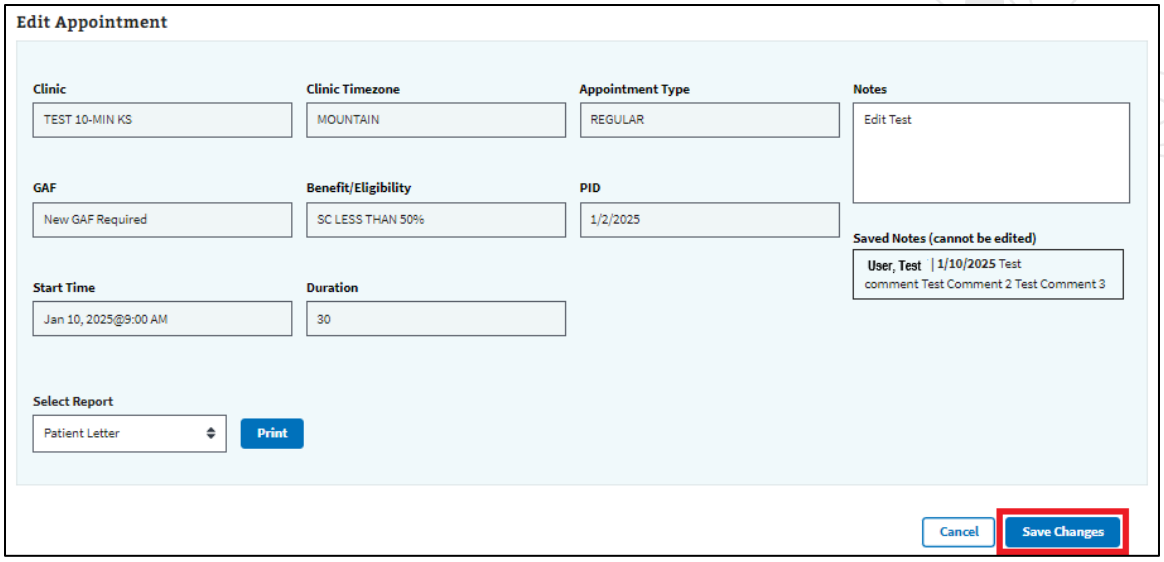


Figure 174: Save Changes Button for Edit Appointment Page

- *Note: The user can also select the "Cancel" button seen in **Figure 174** to exit editing an appointment and go back to the Appointments & Requests page.*

4.4.3 Cancel an APPT, PtCSch, Consult/Procedure, RTC, or VETERAN Appointment

1. To cancel an APPT, PtCSch, Consult/Procedure, RTC, or VETERAN appointment, the user will select the ellipsis, seen in **Figure 175**, next to the appointment within the Pending grid under Appointments.

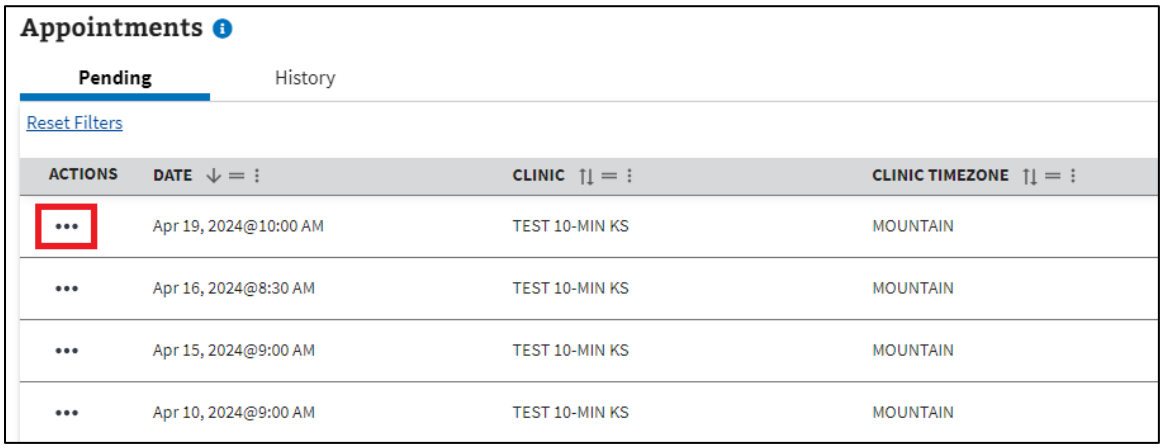


Figure 175: Action Menu Button to Cancel an Appointment

2. This will cause the action menu to appear. The user will then need to select the "Cancel" option, seen in **Figure 176**.

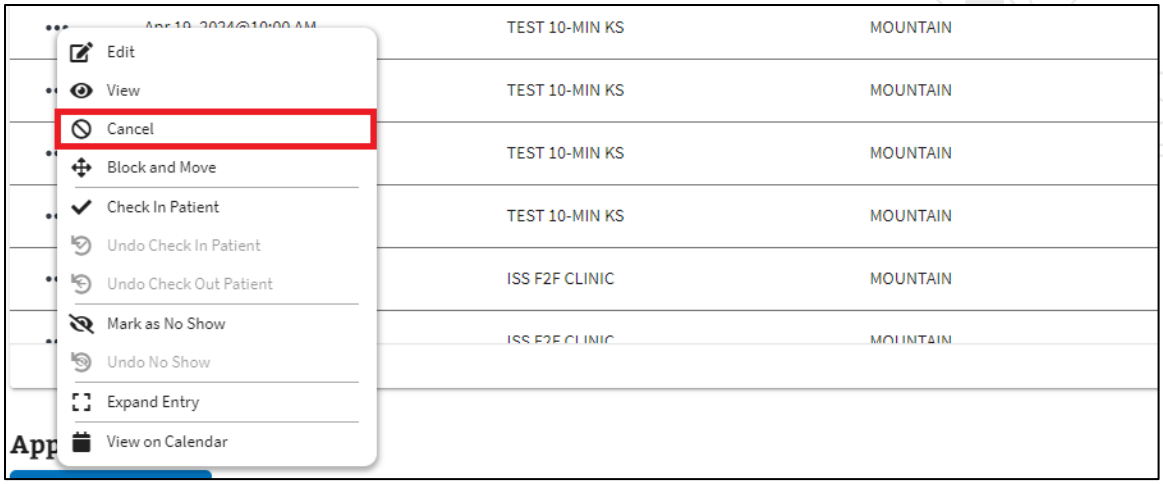


Figure 176: Cancel Option from the Pending Appointments Action Menu

3. The user will be brought to the Cancel Appointment page. On this page, the user will need to fill out all the required information displayed in **Figure 177**. The user can also fill out any optional information as needed.

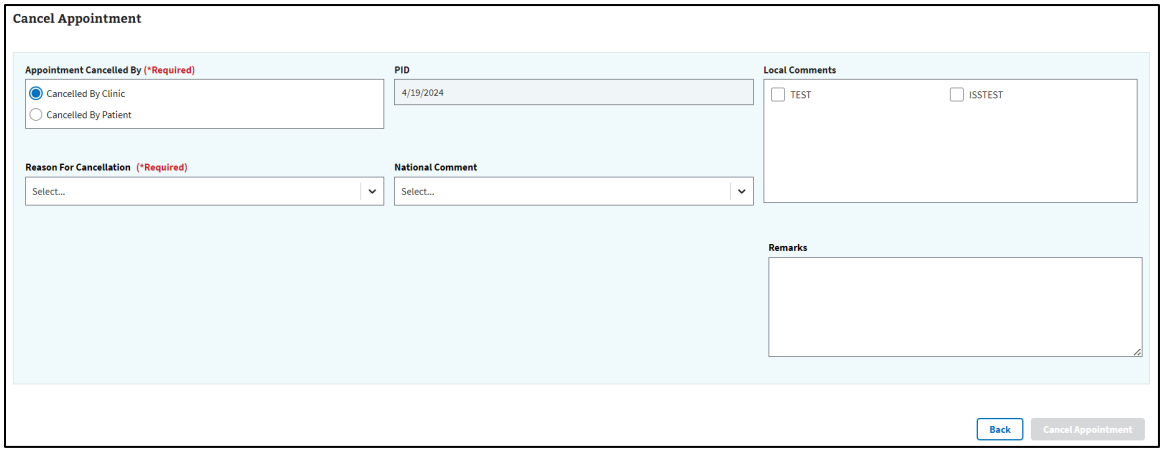


Figure 177: Cancel Appointment Page

- ***Note: The PID section, highlighted below in Figure 178, will be editable when an appointment is cancelled by a patient.***

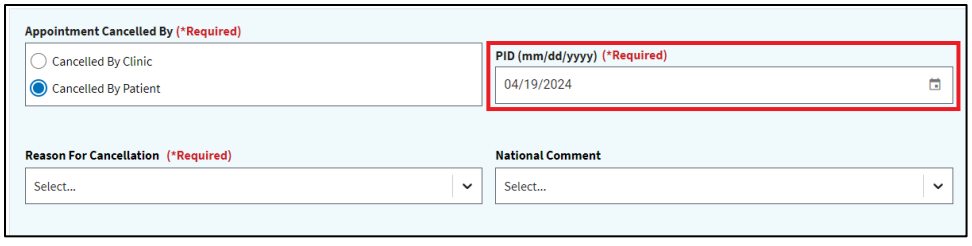


Figure 178: Editable PID Example when Cancelled by Patient

4. Once all applicable information has been filled, the user will then select the “Cancel Appointment” button, seen in **Figure 179**, to cancel the appointment.

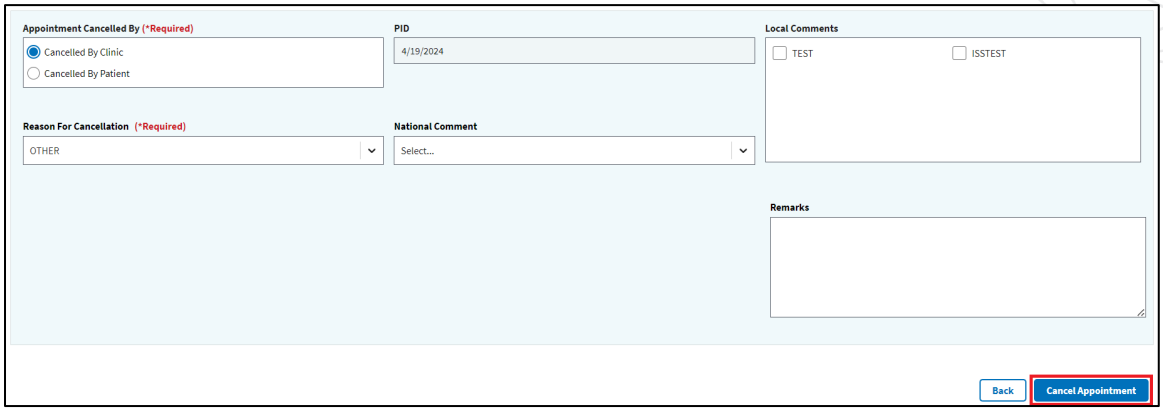


Figure 179: Cancel Appointment Button on the Cancel Appointment Page

5. The Appointment Successfully Cancelled window, shown below in **Figure 180**, will appear. The user can choose to preview the cancellation letter, if needed, or select “Close” to continue.



Figure 180: Preview Cancellation Letter Window

- *Note: After cancelling, most appointments will return to the Appointment Request grid and the user will have the ability to create a new appointment, if needed. For specific cancellation reasons that do not reopen and return to the grid, see* ***8.1 Cancellation Reasons*** *for more information.*

4.4.4 Cancel an MRTC Appointment

1. To cancel an MRTC appointment, the user will select the ellipsis, seen in **Figure 181**, next to the appointment within the Pending grid under Appointments.

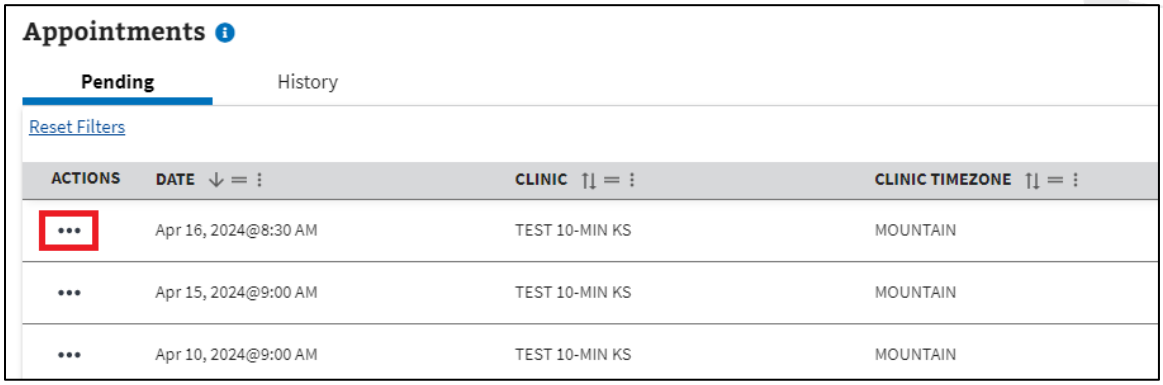


Figure 181: Action Menu Button to Cancel MRTC Appointments

2. This will cause the action menu to appear. The user will then need to select the "Cancel" option, seen in **Figure 182**.

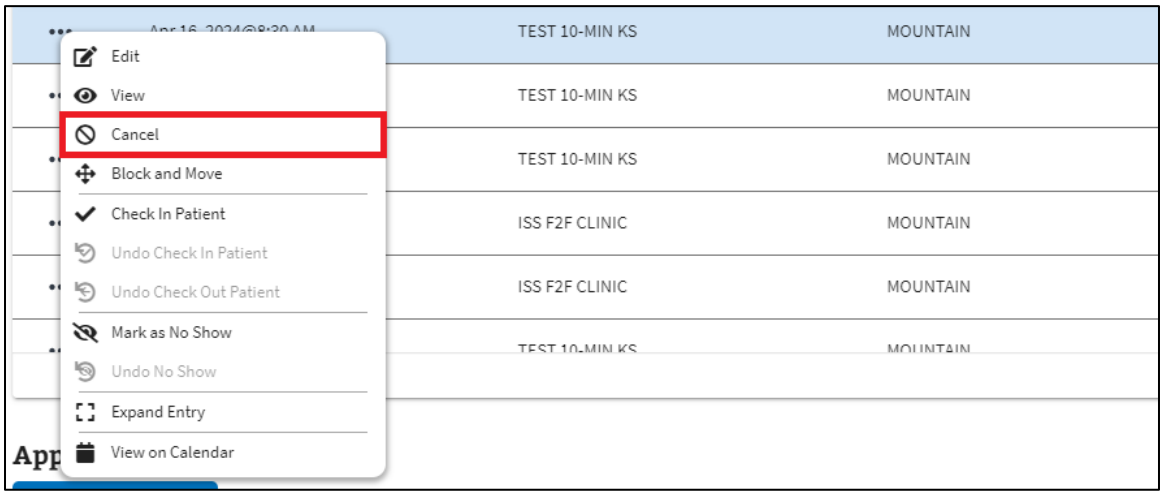


Figure 182: Cancel Option from the Pending Appointments Action Menu for MRTC

3. Once selected, the user will be brought to the Cancel MRTC Appointment page, as seen below in **Figure 183**. The user will be given the option to cancel either the selected appointment only, or all the appointments in the series. If canceling all appointment, the user also has the option to close the MRTC parent request, which would close all associated appointment request(s) in the series.

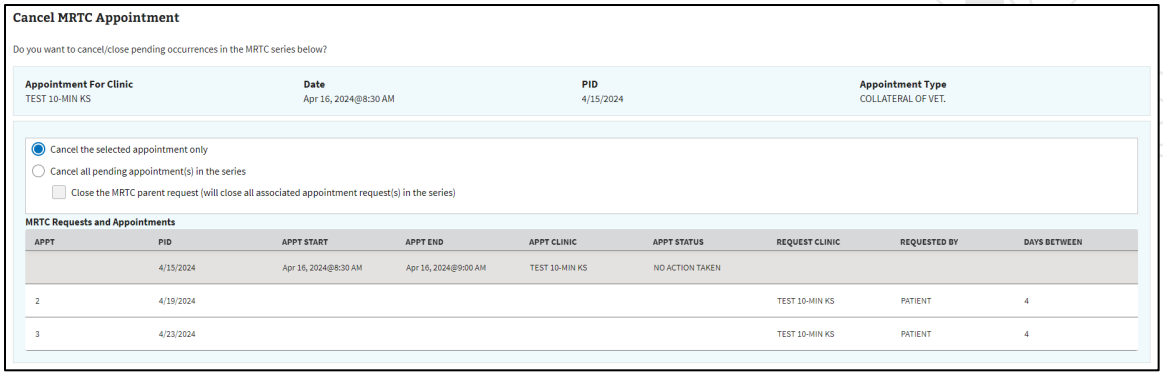


Figure 183: Cancel MRTC Appointment Options for Parent and Child Appointments

4. Below the options for cancelling other associated MRTC appointments and requests, the user will also need to fill out all the required information displayed in **Figure 184**. The user can also fill out any optional information as needed.

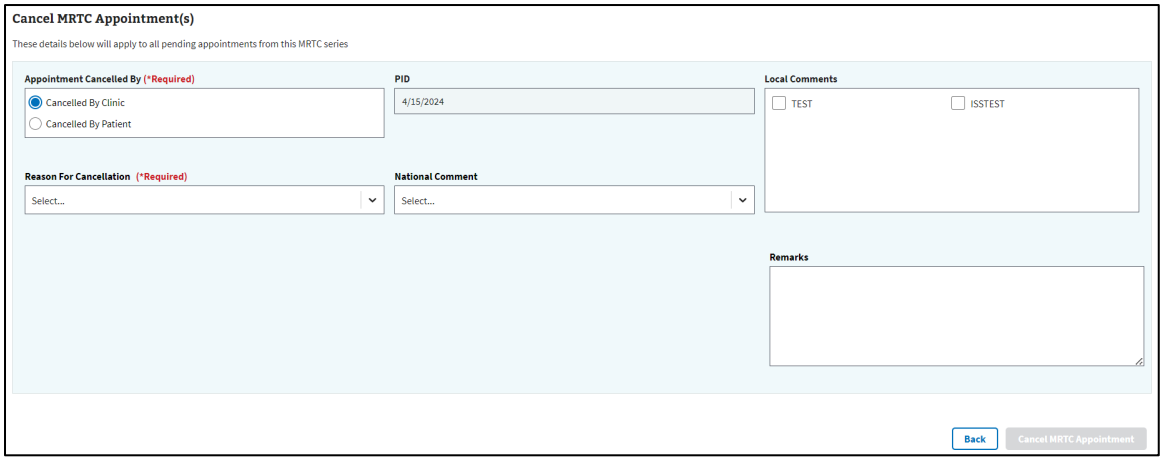


Figure 184: Cancel MRTC Appointment(s) Page

5. Once all applicable information has been filled out, the user will then select the “Cancel MRTC Appointment” button, seen below in **Figure 185**, to cancel the appointment.

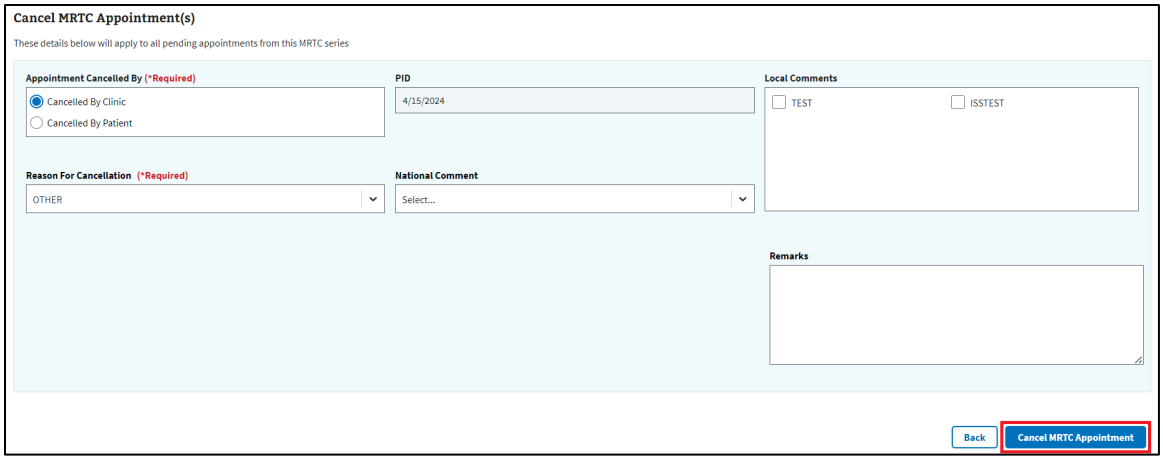


Figure 185: Cancel MRTC Appointment Button

6. The Appointment Successfully Cancelled window, shown below in **Figure 186**, will appear. The user can choose to preview the cancellation letter, if needed, or select "Close" to continue.



Figure 186: Preview Cancellation Letter Window for MRTC

4.4.5 Expand Entry

1. To expand entry on an appointment, the user will select the ellipsis, seen in **Figure 187**, next to the appointment within the Pending grid under Appointments.

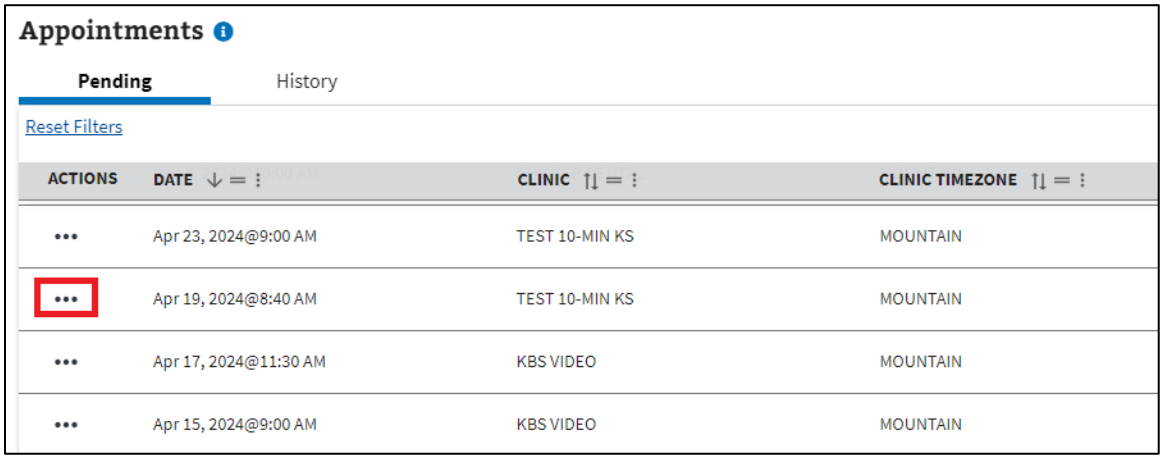


Figure 187: Action Menu Button to Expand Entry

2. This will cause the action menu to appear. The user will then need to select the "Expand Entry" option, seen in **Figure 188**.

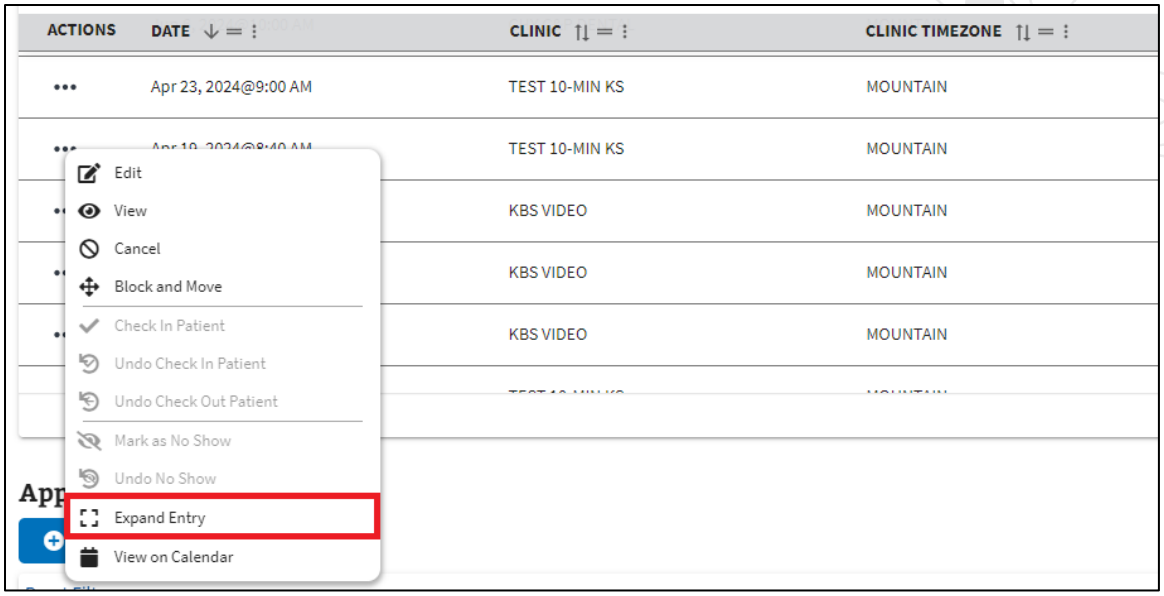


Figure 188: Expand Entry Option from Pending Appointments Action Menu

3. The user will be brought to the Expanded Entry page, shown below in **Figure 189**. The user can view the fields within expanded entry by either selecting the "+" button next to an individual row, or by selecting "Expand all +."

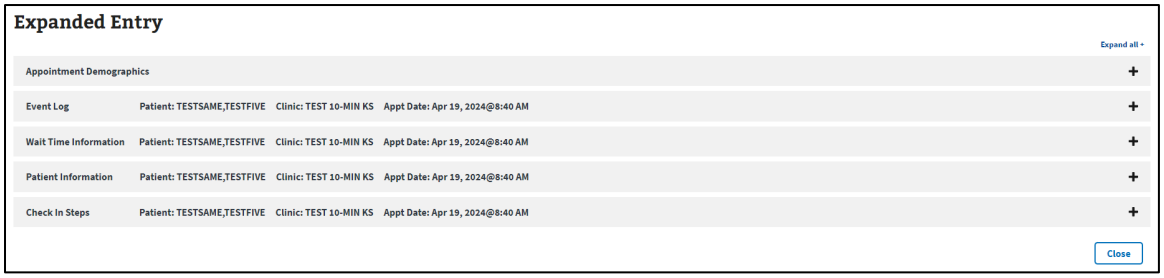


Figure 189: Expanded Entry Page

4.4.6 Block and Move

1. To block and move an appointment, the user will select the ellipsis, seen in **Figure 190**, next to the appointment within the Pending grid under Appointments.

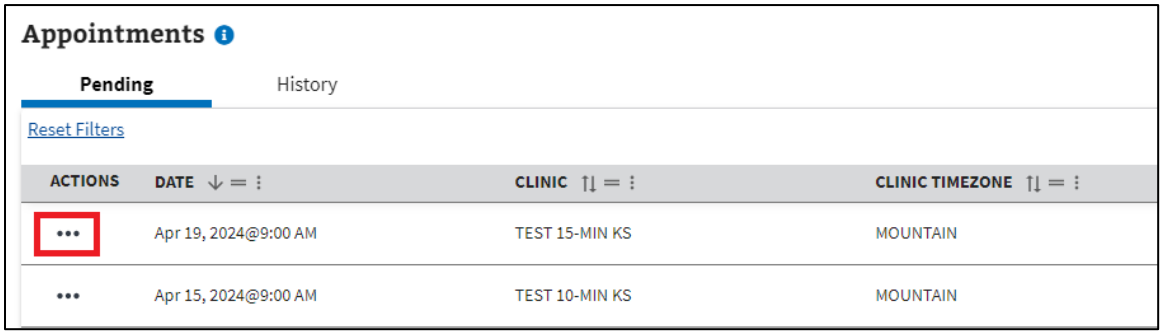


Figure 190: Action Menu Button to Block and Move an Appointment

2. This will cause the action menu to appear. The user will then need to select the “Block and Move” option, seen in **Figure 191**.

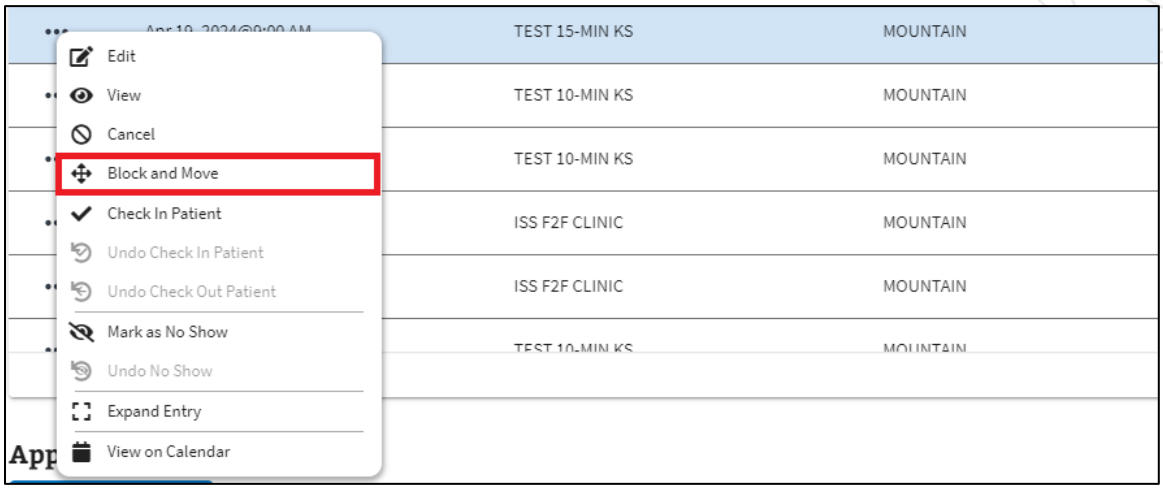


Figure 191: Block and Move Option from the Pending Appointments Action Menu

3. The user will be brought to the Block and Move Appointment page, seen below in **Figure 192**. The user will need to navigate to the preferred available timeslot on the calendar and left click on the date.

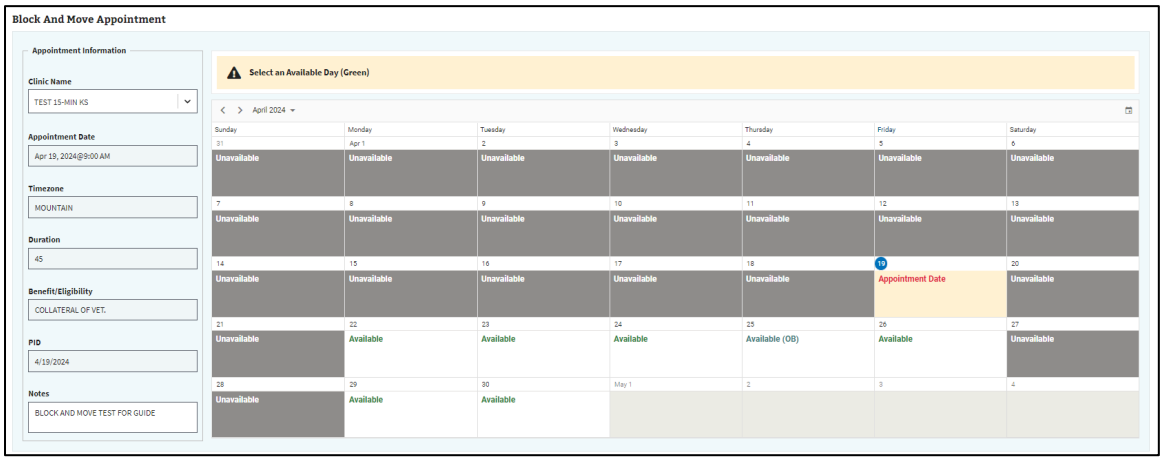


Figure 192: Block and Move Appointment Page

- *Note: The user can use the Appointment Information section, seen in **Figure 193**, to change any of the editable fields on the appointment.*

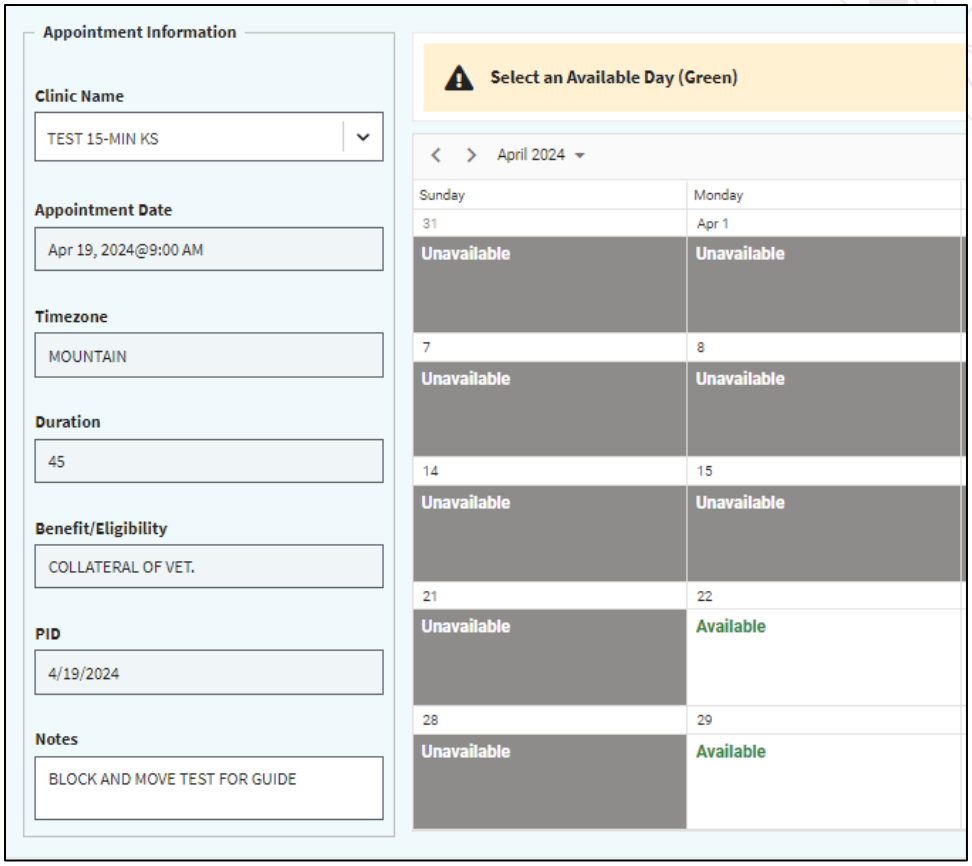


Figure 193: Appointment Information Section for Block and Move

4. Once an available date is selected, the user can then select the “Block and Move” button, seen in **Figure 194**, to block and move the appointment to the intended date.

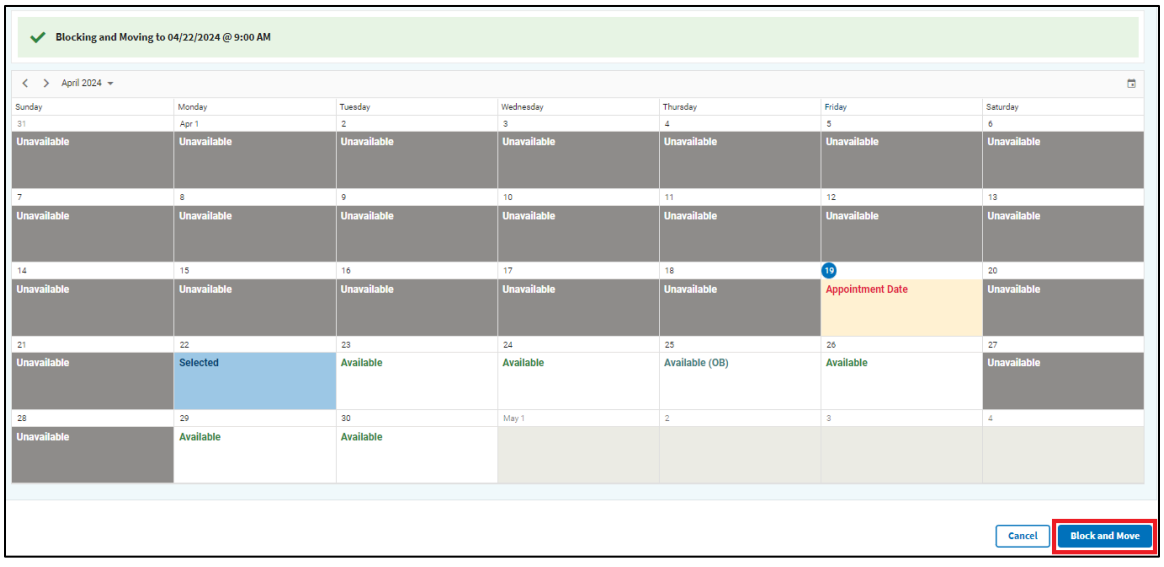


Figure 194: Block and Move Button

5. The Appointment Successfully Created window, shown below in **Figure 195**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

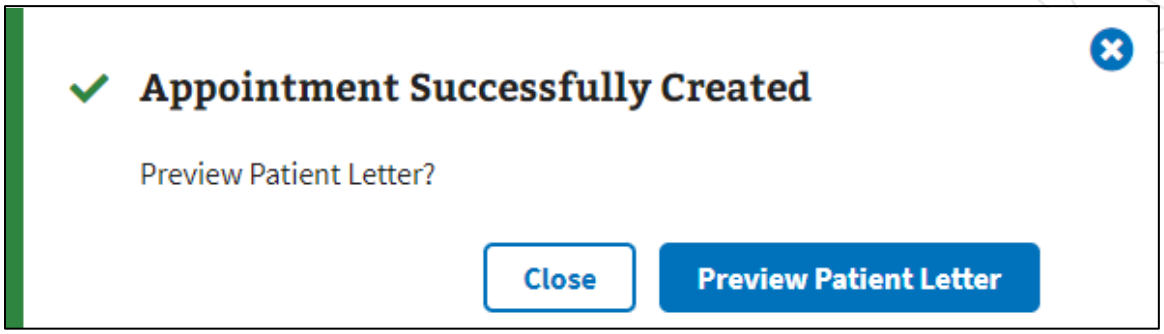


Figure 195: Preview Patient Letter for Block and Move

4.4.7 Check In

1. To check in an appointment, the user will select the ellipsis, seen in **Figure 196**, next to the appointment within the Pending grid under Appointments.

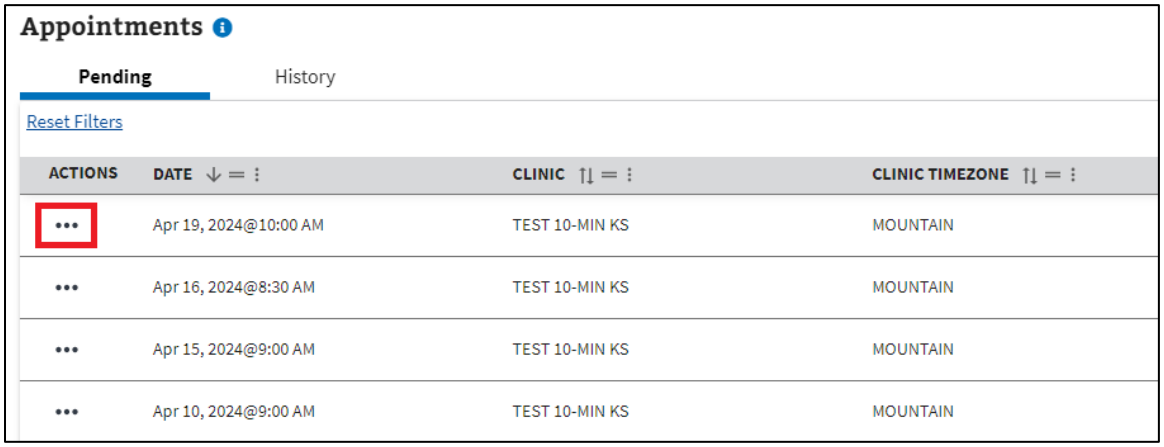


Figure 196: Action Menu Button to Check In Appointments

- *Note: Users cannot check in a future appointment.*

2. This will cause the action menu to appear. The user will then need to select the "Check In" option, seen in **Figure 197**.

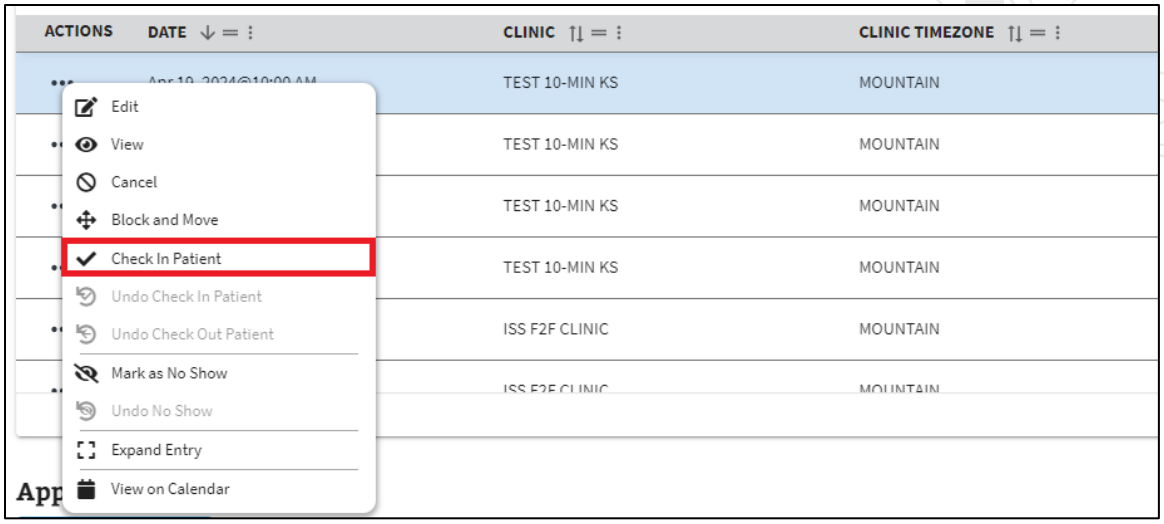


Figure 197: Check In Patient Option from the Pending Appointments Action Menu

3. The user will be brought to the Appointment Check In page. On this page, the user will need to select the "Check In" button, seen in **Figure 198**, to check the appointment in.

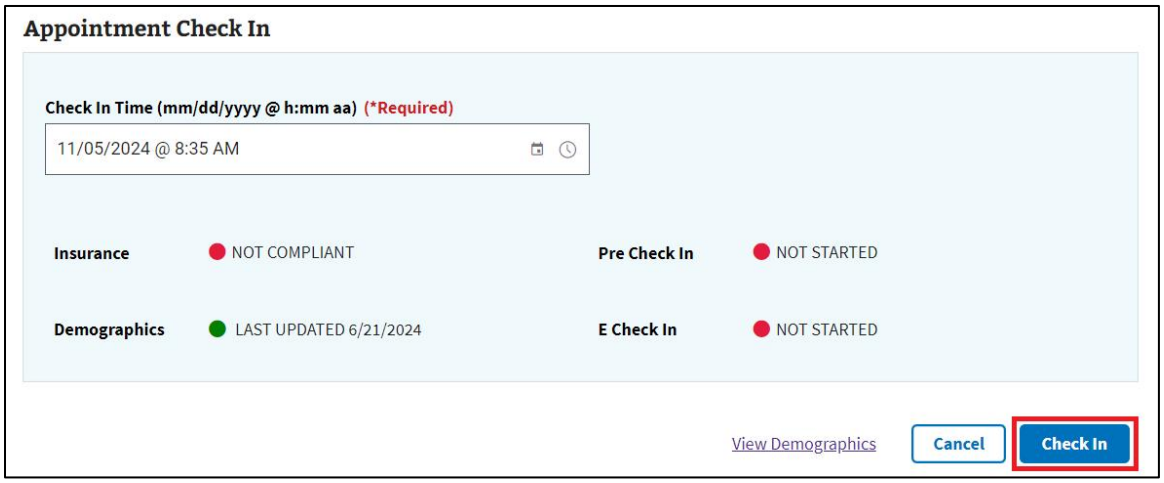


Figure 198: Check In Button

- *Note: Users can change the check in time by editing the Check In Time field. The edited time and date must be in the past.*
- *Note: The user can also select the "Cancel" button seen in **Figure 198** to exit the check in process and go back to the Appointments & Requests page.*
- *Note: Users can also select the "View Demographics" option to navigate to the patient demographic tab. See section **3.4 Demographics** for more information.*

4.4.8 Undo Check In

1. To undo check in on a previously checked in appointment, the user will select the ellipsis, seen in **Figure 199**, next to the appointment within the Pending grid under Appointments.

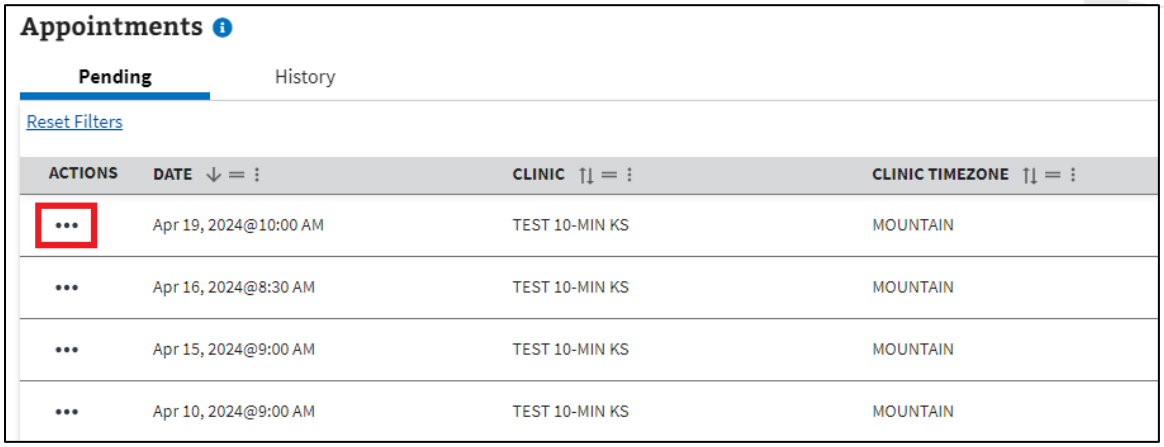


Figure 199: Action Menu Button to Undo Check In

2. This will cause the action menu to appear. The user will then need to select the "Undo Check In Patient" option, seen in **Figure 200**. This will cause the page to automatically refresh and the appointment to no longer be checked in.

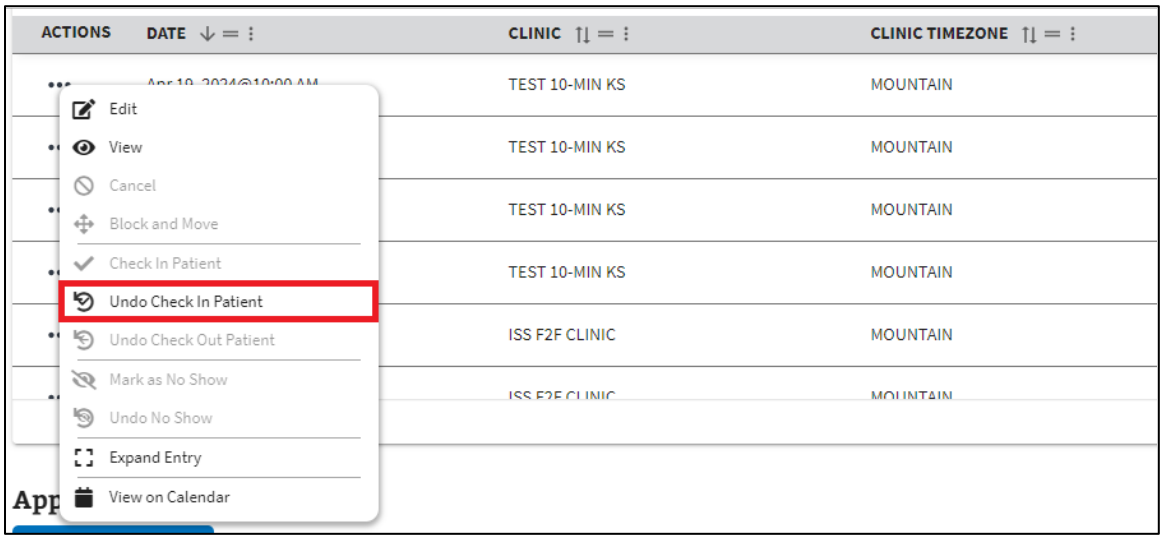


Figure 200: Undo Check In Patient Option from the Pending Appointments Action Menu

4.4.9 Undo Check Out

*Disclaimer: This section of the guide is only applicable to users holding the SD SUPERVISOR key. If the user does not have elevated access permissions set to their VistA account, the "Undo Check Out" button in **Figure 202** will be greyed out and unavailable for selection. If a user needs access to make changes on this application, please contact your Supervisor for assistance.*

1. To undo check out on a previously checked out appointment, the user will select the ellipsis, seen in **Figure 201**, next to the appointment within the History grid under Appointments.

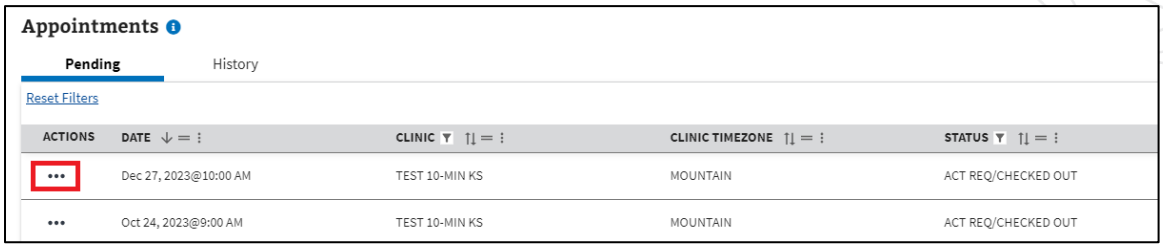


Figure 201: Action Menu Button to Undo Check Out

2. This will cause the action menu to appear. The user will then need to select the "Undo Check Out Patient" option, seen in **Figure 202**. This will cause the page to automatically refresh, and the appointment moved to the Pending grid where it is no longer checked out.

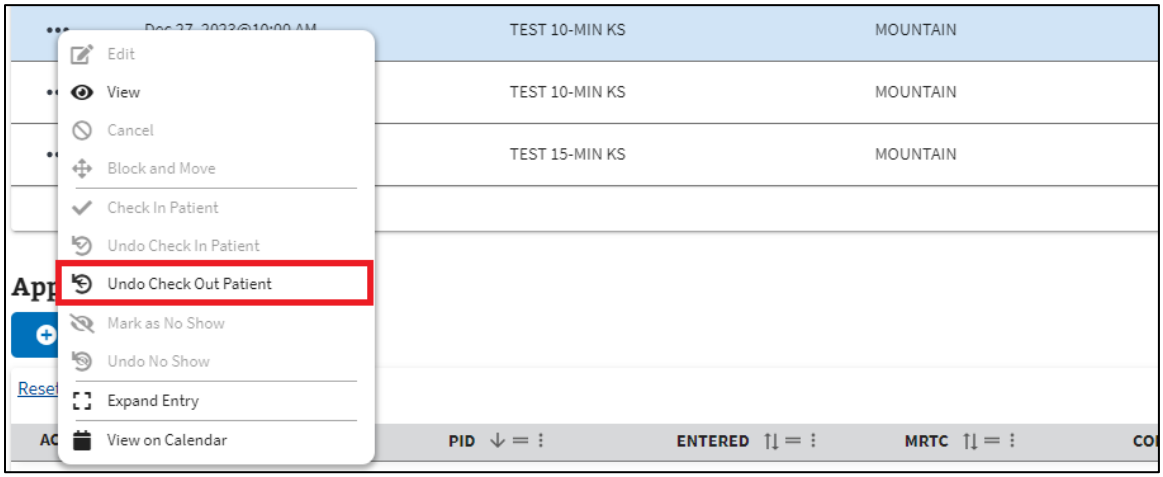


Figure 202: Undo Check Out Patient Option from the Pending Appointments Action Menu

- ❖ *Note: Users can only undo a checkout on the day of the appointment being checked out.*

4.4.10 Mark as No Show

1. To mark an appointment as no show, the user will select the ellipsis, seen in **Figure 203**, next to the appointment within the Pending grid under Appointments.

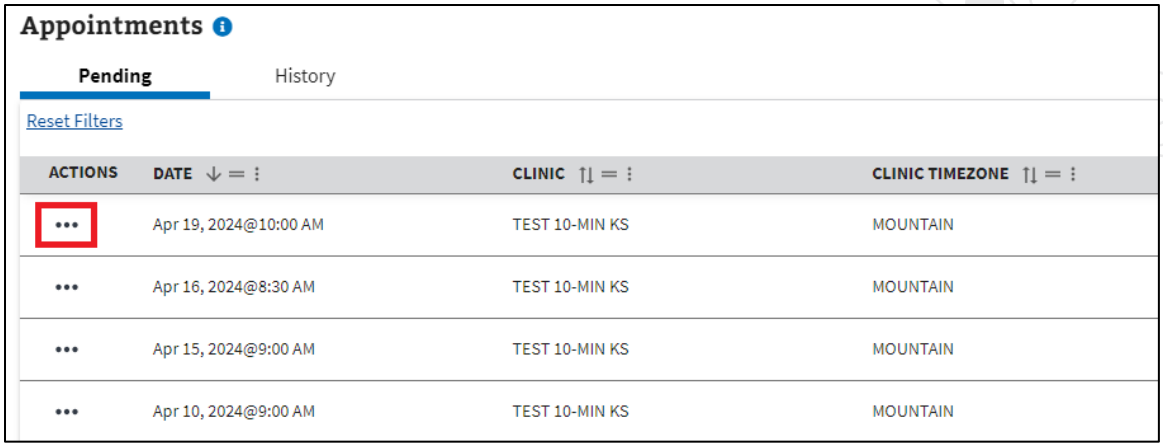


Figure 203: Action Menu Button to Mark as No Show

2. This will cause the action menu to appear. The user will then need to select the "Mark as No Show" option, seen in **Figure 204**.

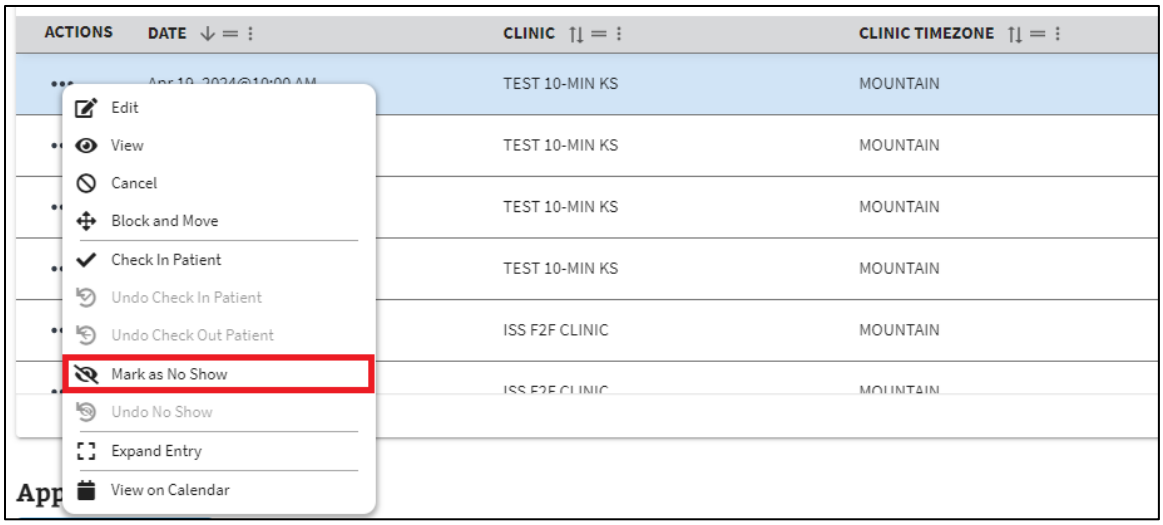


Figure 204: Mark as No Show Option from the Pending Appointment Action Menu

- ❖ *Note: Users can only mark an appointment as no show on the day of the appointment after the start time of the appointment has passed.*

3. Once selected, the Confirm No Show window will appear. The user will need to select the "Confirm" button, seen in **Figure 205**, to continue.

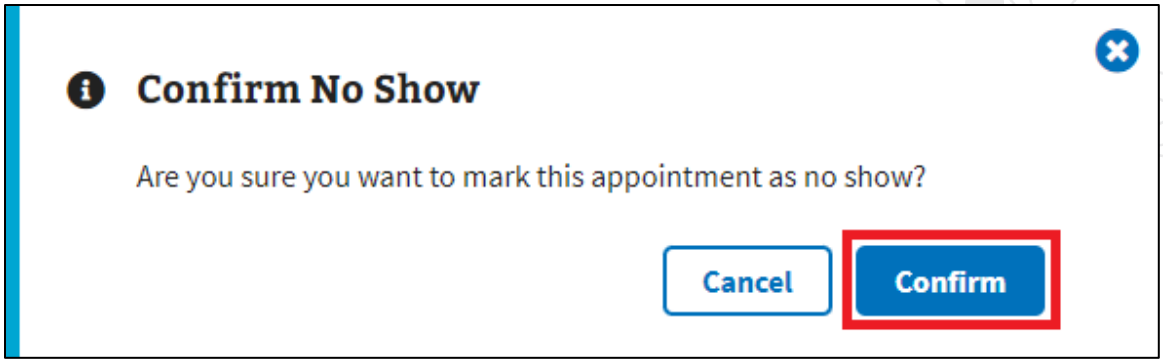


Figure 205: Confirm Button to Mark as No Show

- *Note: The user can also select the "Cancel" button seen in **Figure 205** to cancel marking the appointment as no show and go back to the Appointments & Requests page.*

4. The Successfully Marked as No Show window, shown below in **Figure 206**, will appear. The user can choose to preview the no show letter, if needed, or select "Cancel" to continue.



Figure 206: Preview No Show Letter Window

4.4.11 Undo Mark as No Show

1. To undo no show on a previously marked as no show appointment, the user will select the ellipsis, seen in **Figure 207**, next to the appointment within the History grid under Appointments.

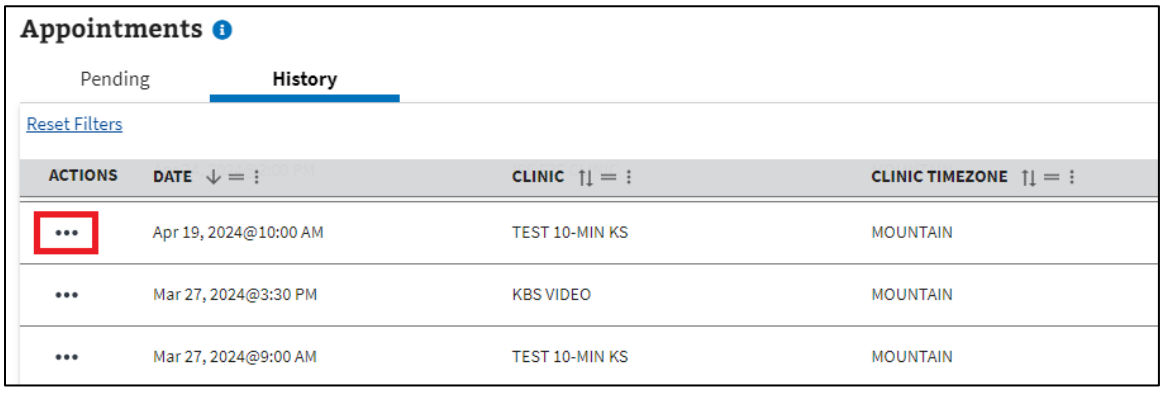


Figure 207: Action Menu Button to Undo No Show

2. This will cause the action menu to appear. The user will then need to select the "Undo No Show" option, seen in **Figure 208**. This will cause the page to automatically refresh, and the appointment moved to the Pending grid where it is no longer marked as no show.

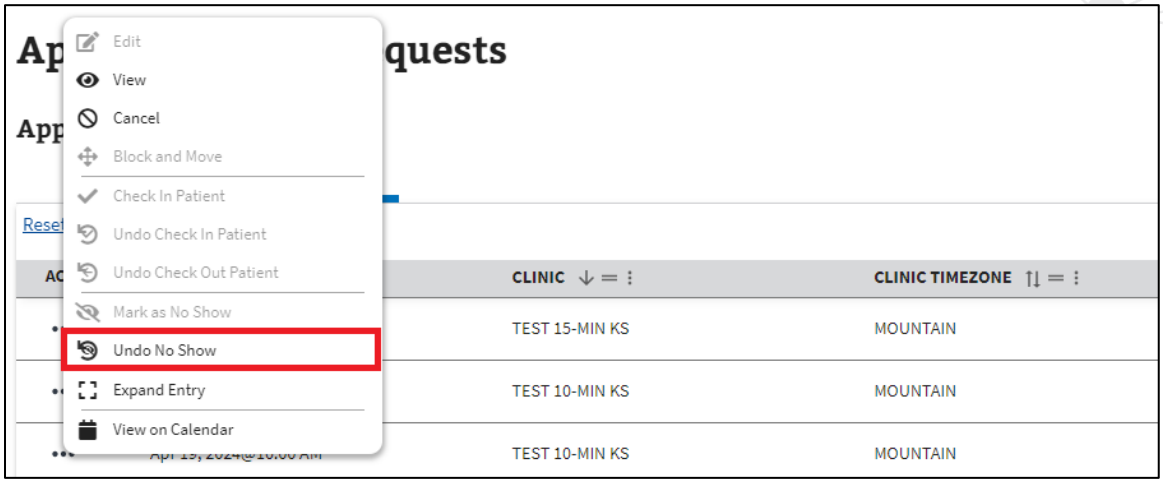


Figure 208: Undo No Show Option from the Pending Appointments Action Menu

4.4.12 Calendar View

Users have the ability to view the calendar for a specific appointment.

1. To view, users can select the ellipsis, seen in **Figure 209**, next to the appointment within the Pending grid.

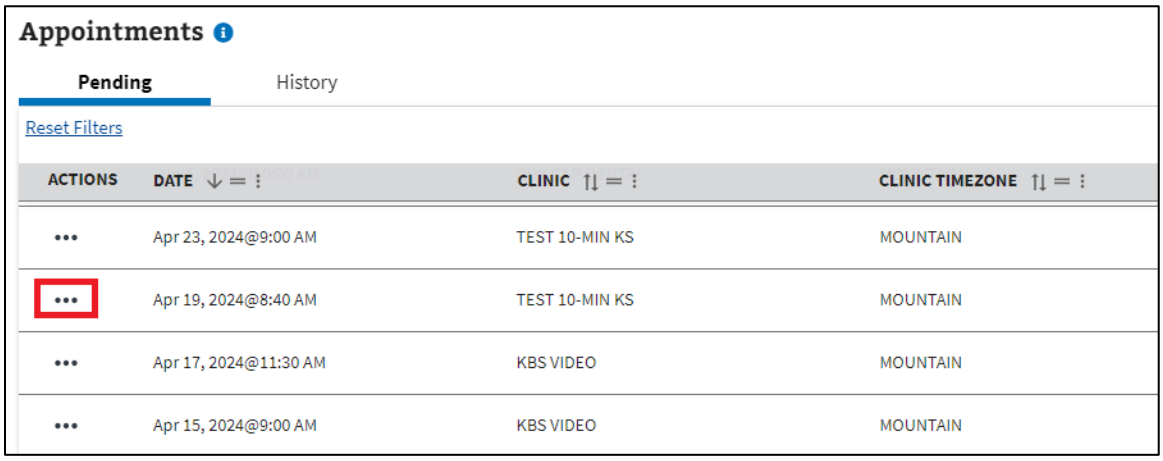


Figure 209: Action Menu Button to View on Calendar

2. This will cause the action menu to appear. The user will then need to select the "View on Calendar" option, seen in **Figure 210**.

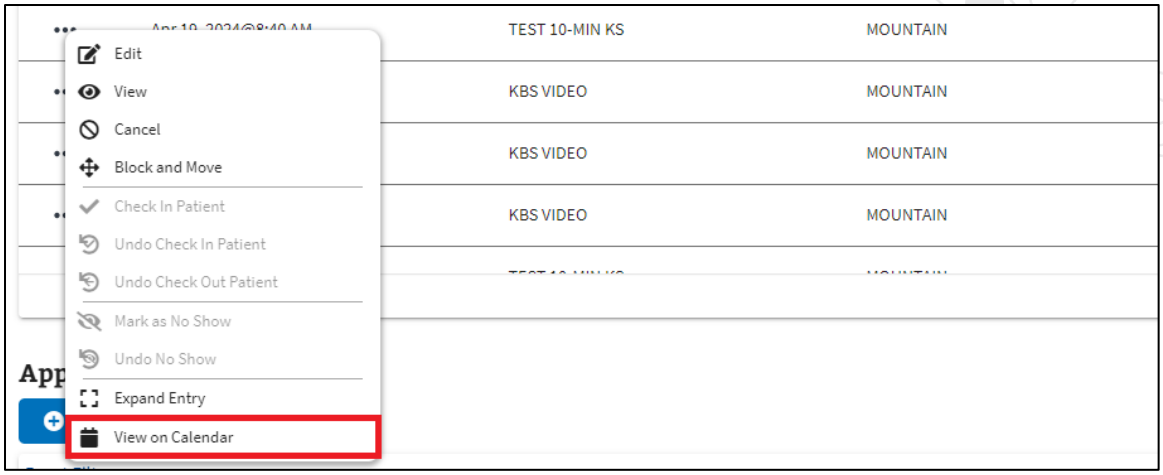


Figure 210: View on Calendar Option from the Pending Appointments Action Menu

3. Once on the clinic calendar, the user has the option to utilize all other appointment actions, seen in sections **4.4.1 View** - **4.4.11 Undo Mark as No Show** above, by navigating to a specific appointment on the calendar.
4. The user will then need to right-click on the appointment to bring up the action menu to see the available options, as seen below in **Figure 211**.

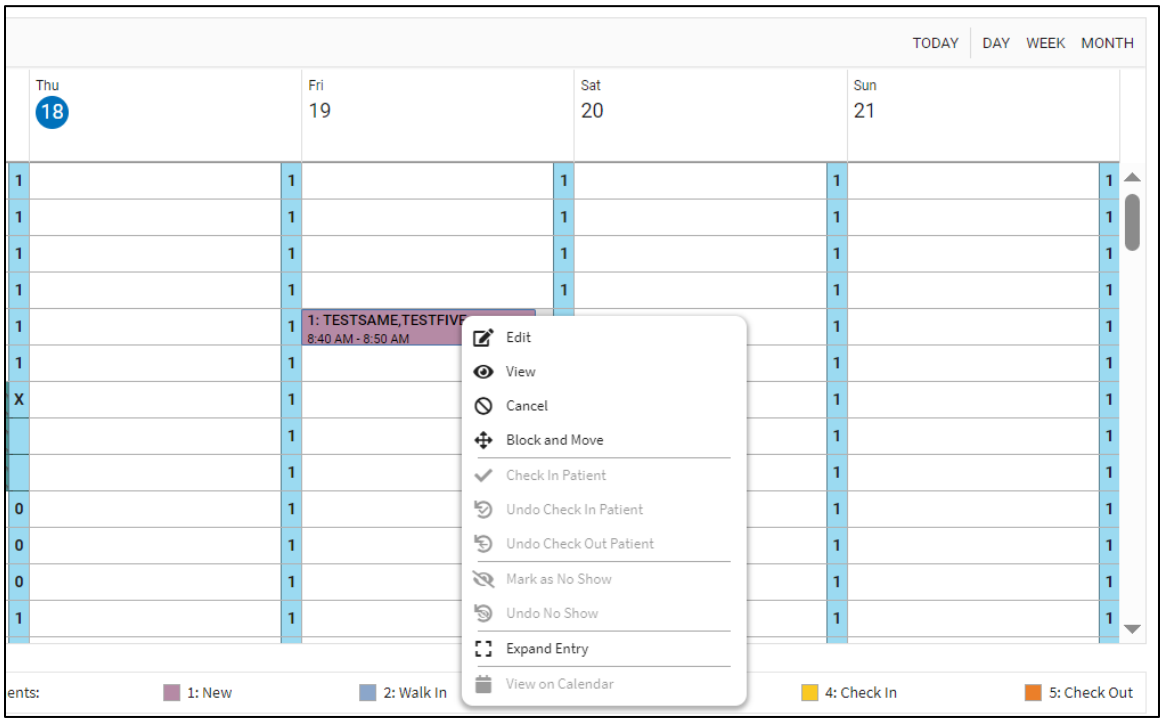


Figure 211: Action Menu from Calendar View

- *Note: The user can also create a walk-in appointment on this page by following the steps outlined in **5.4 Create Walk-in**.*

4.4.13 Letter Printing

Users have the ability to print different letter types within the ISS application. This can be accomplished by either selecting the "Preview Patient Letter" button when prompted, or by following the steps outlined in **4.4.1 View**, selecting a letter option in the Select Report dropdown, and clicking "Print" (shown in **Figure 212**.)

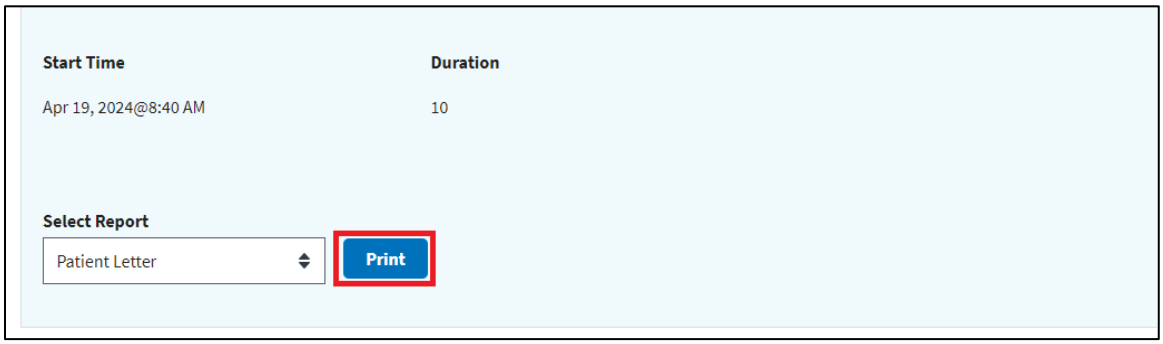


Figure 212: Print Button for Letter Printing

1. After choosing to preview or print a letter, the user will be brought to the Patient Appointment Letter window. From here, the user will need to select a printer from the dropdown seen below in **Figure 213.**

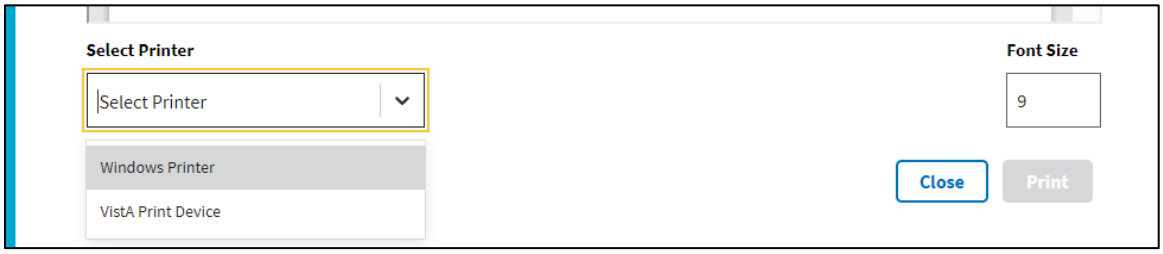


Figure 213: Printer Options Dropdown

- *Note: If the user chooses "VistA Print Device" from the printer options, the user will need to search and select a VistA printer, as seen below in **Figure 214**, before the print button becomes available to select.*

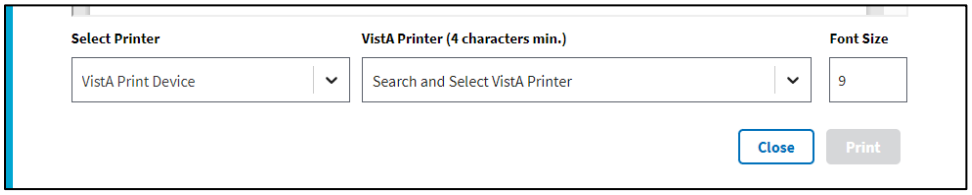


Figure 214: VistA Print Option

2. After choosing a printer from the dropdown seen in **Figure 213**, the print button will become available to select, as seen in **Figure 215**. Selecting this will bring the user to the print preview screen.

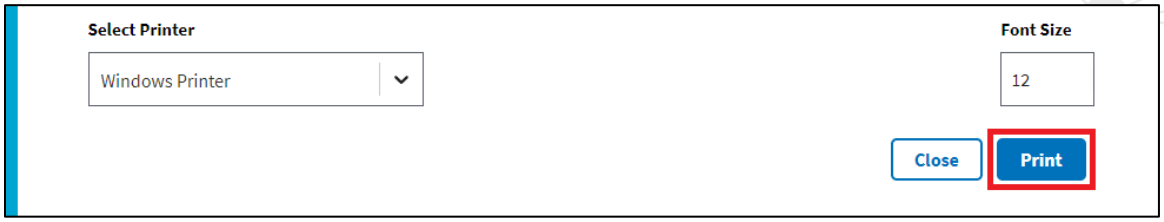


Figure 215: Print Button from Patient Appointment Letter Window

- ❖ *Note: The user can also change the font of the letter from this screen. To do so, the user can enter a specific font size within the box, seen in **Figure 216**, or select the arrows to increase/decrease the size.*



Figure 216: Changing Font Size for Letter Printing

4.5 Video Visits

4.5.1 Creating Video Visits

1. To create a video visit, users will need to follow the steps outlined in **4.1 Creating Appointment Requests** and ensure a clinic with video visit eligibility is selected.
2. Users will then need to follow the steps outlined in **4.3 Creating a Pending Appointment**. Once the Appointment Successfully Created window appears, the user will need to select the "Create Video Visit" button, seen in **Figure 217**, to continue.

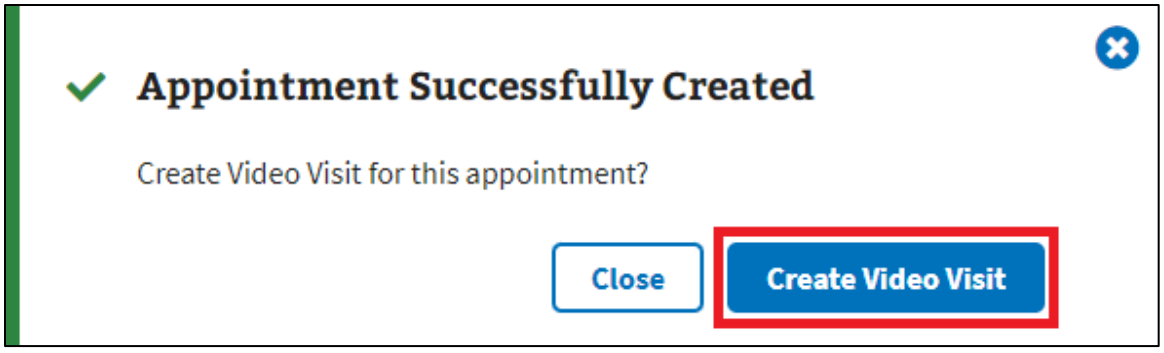


Figure 217: Create Video Visit Button from Creation Window

3. The Confirm Patient Contact window will appear. The user will need to select the "OK" button, seen in **Figure 218**, to continue to the New Video Visit page.



Figure 218: Ok Button to Confirm Patient Contact

4. On the New Video Visit page, the user will need to fill out all the required information displayed in **Figure 219**. The user can also fill out any optional information as needed.

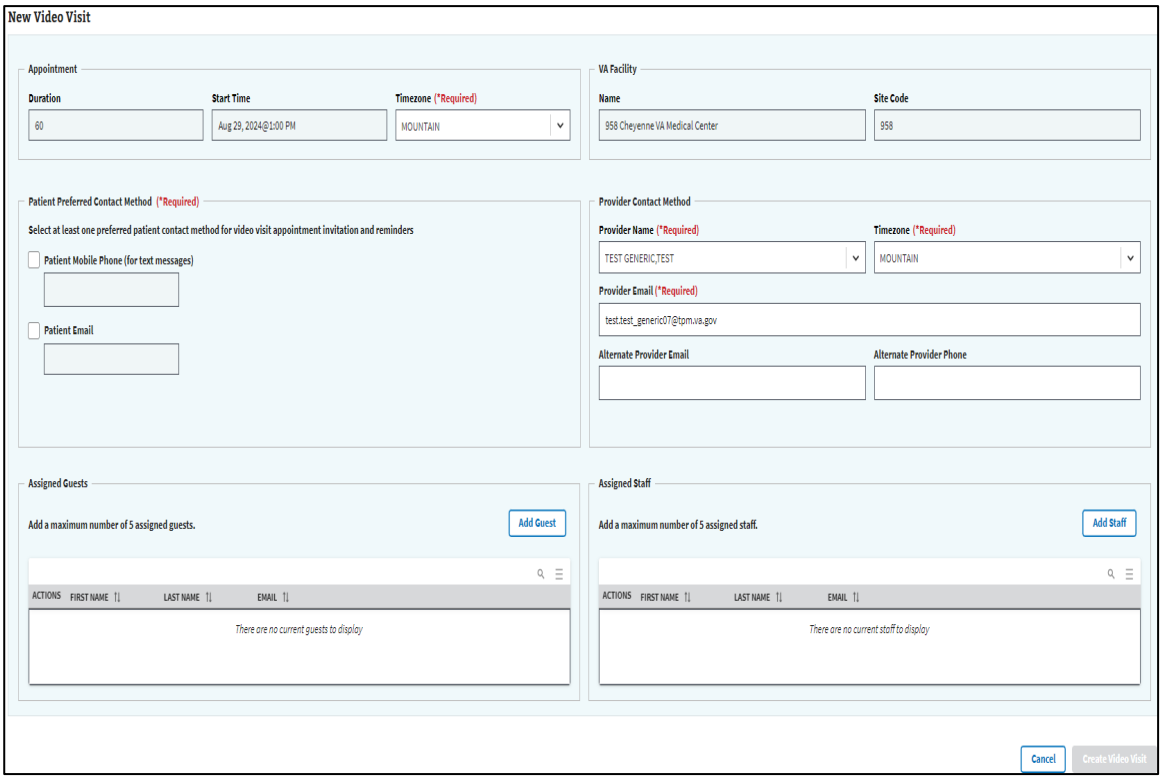


Figure 219: New Video Visit Page

❖ *Note: Users with VA-issued devices will have an additional check box as seen in **Figure 220** below. If checked, the appointment will automatically be sent to the user's VA-issued device. If unchecked, the user will continue video visit creation as normal and enter their preferred email.*

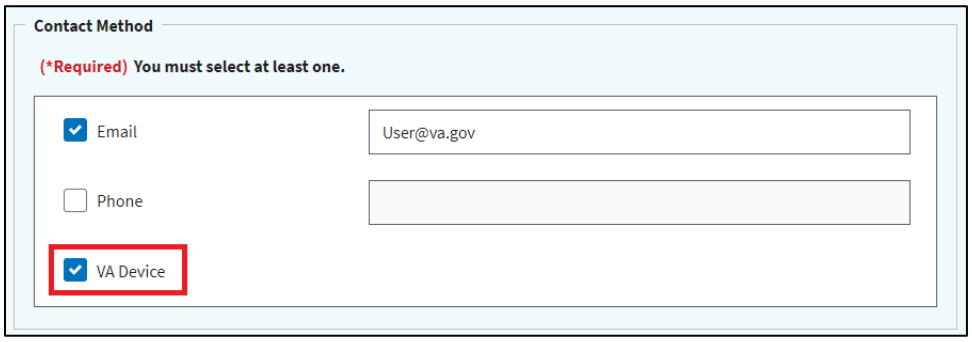


Figure 220: VA-issued Device Selection for Video Visit

5. Once all applicable information has been filled, the user will then select the "Create Video Visit" button, seen in **Figure 221**, to create the video visit. The user will have the option to preview a patient letter, if needed.

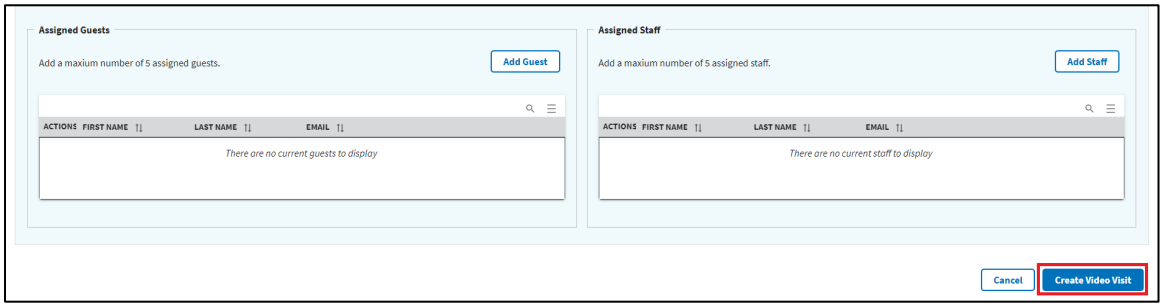


Figure 221: Create Video Visit Button when Creating Video Visit

4.5.2 Viewing Video Visits

1. To view a video visit, the user can select the ellipsis, seen in **Figure 222**, next to the appointment within the Pending grid under Appointments.

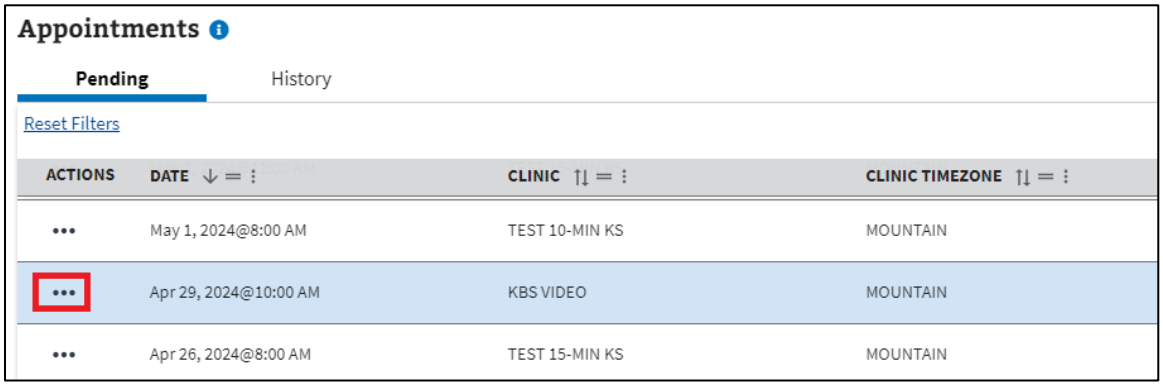


Figure 222: Action Menu Button to View Video Visits

2. This will cause the action menu to appear. The user will then need to select the “View” option, seen in **Figure 223**.

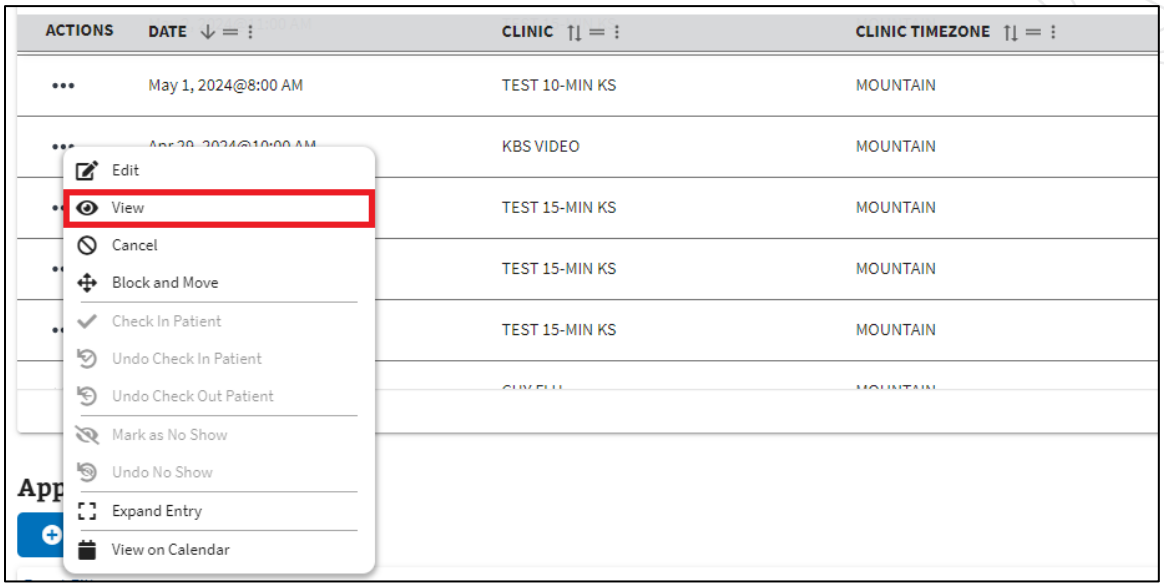


Figure 223: View Option for Video Visits from the Pending Appointments Action Menu

3. The user will be brought to the View Appointment page. On this page, the user will need to select the “View Video Visit” button, seen in **Figure 224**, to continue to the View Video Visit page.

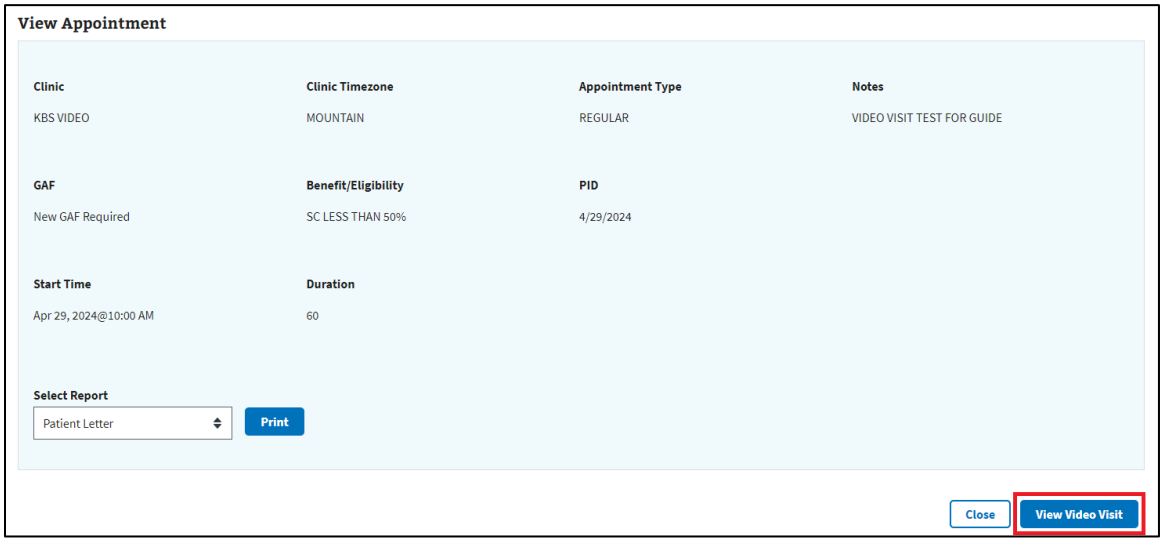


Figure 224: View Video Visit Button

4.5.3 Editing Video Visits

1. To edit a video visit, the user can select the ellipsis, seen in **Figure 225**, next to the appointment within the Pending grid under Appointments.

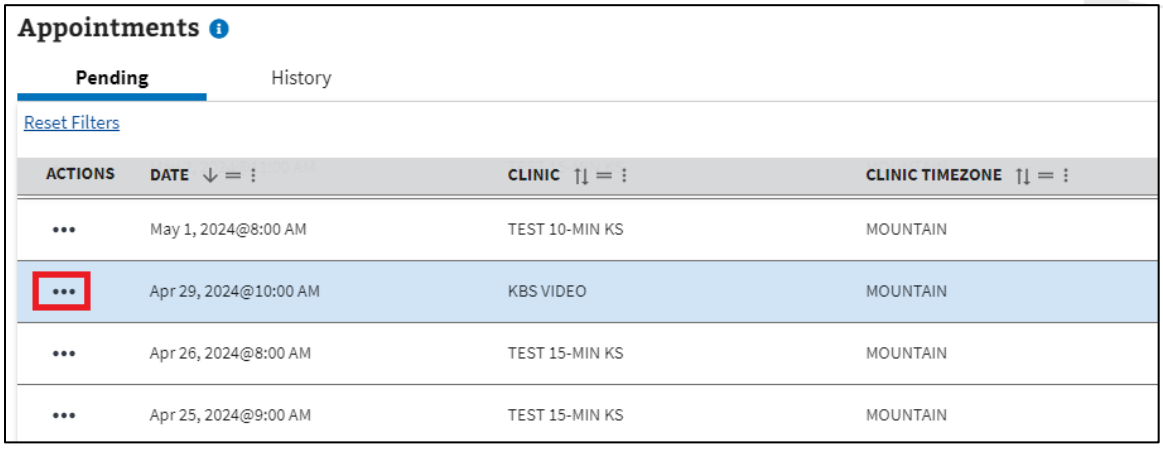


Figure 225: Action Menu Button to Edit Video Visits

2. This will cause the action menu to appear. The user will then need to select the "Edit" option, seen in **Figure 226**.

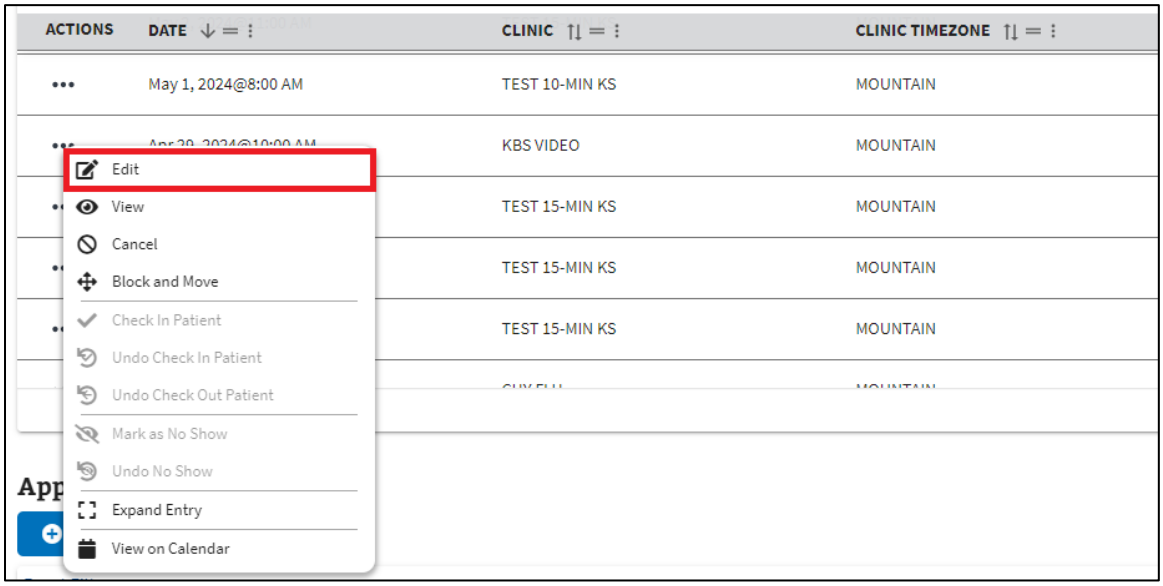


Figure 226: Edit Option for Video Visits from the Pending Appointments Action Menu

3. The user will be brought to the Edit Appointment page. On this page, the user will need to select the “Edit Video Visit” button, seen in **Figure 227**, to continue to the Edit Video Visit page.

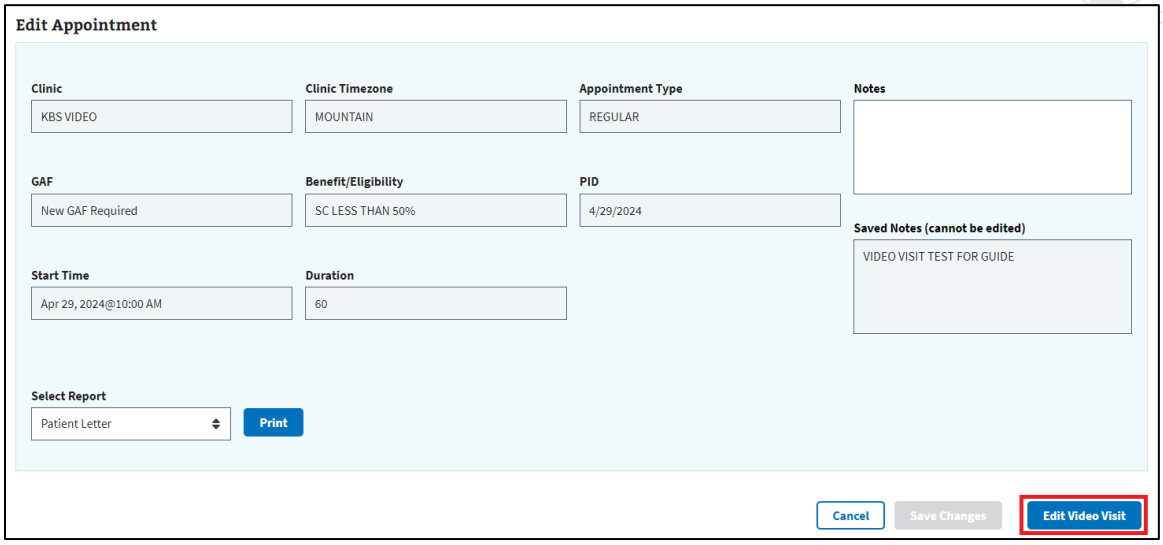


Figure 227: Edit Video Visits Button

4. On the Edit Video Visit page, the user can edit any of the editable fields. Once all edits have been made, the user will then select the “Save Changes” button, seen in **Figure 228**, to save the edits.

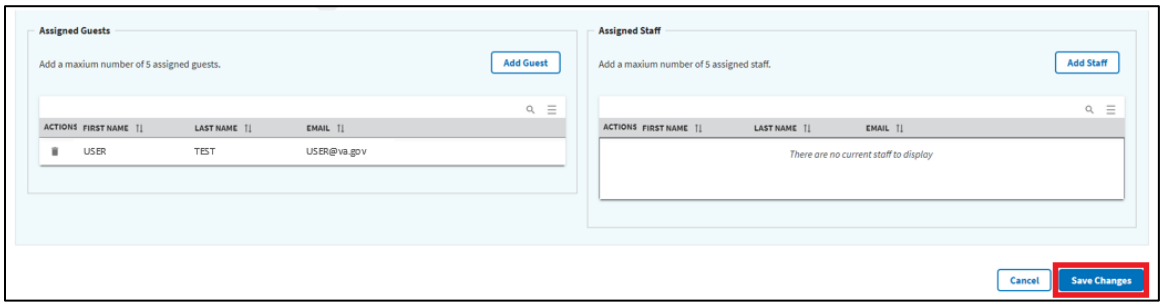


Figure 228: Save Changes Button on the Video Visits Page

4.5.4 Resending Video Visits

1. To resend video visit notifications, the user will select the ellipsis, seen in **Figure 229**, next to the appointment within the Pending grid under Appointments.

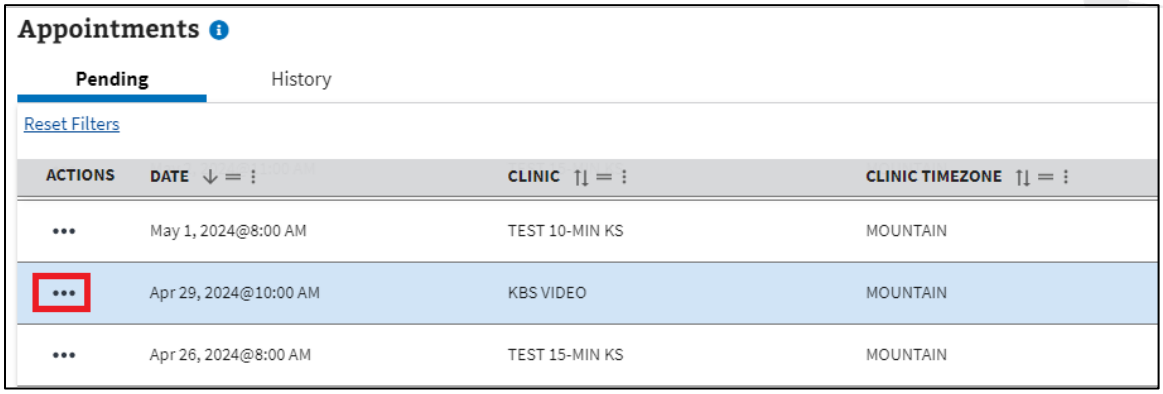


Figure 229: Action Menu Button to Resend Video Visits

2. This will cause the action menu to appear. The user will then need to select the "View" option, seen in **Figure 230**.

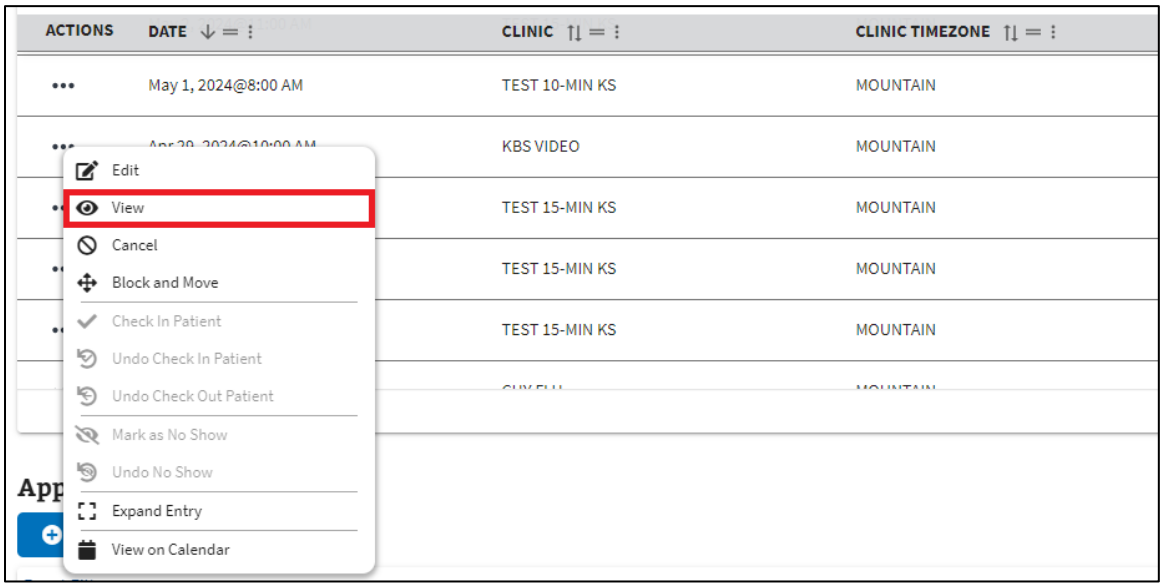


Figure 230: View Option for Resending Video Visits from the Pending Appointments Action Menu

3. The user will be brought to the View Appointment page. On this page, the user will need to select the “View Video Visit” button, seen in **Figure 231**, to continue to the View Video Visit page.

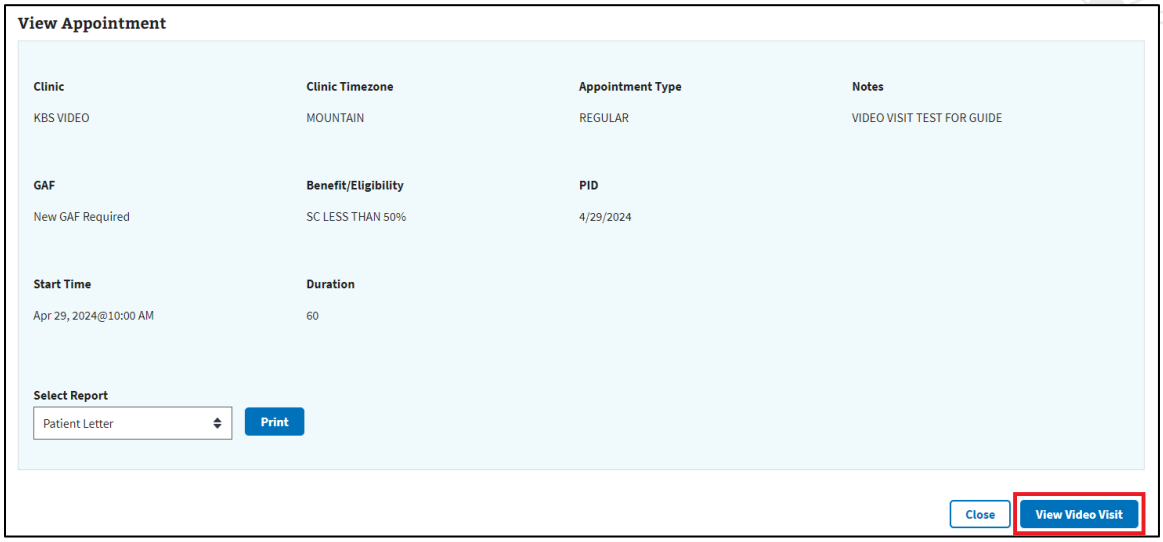


Figure 231: View Video Visits Button to Resend Visit

4. On the View Video Visit page, the user can select the “Resend Video Visit Notifications” button, seen in **Figure 232**, to resend the video visit notification to all attending parties.

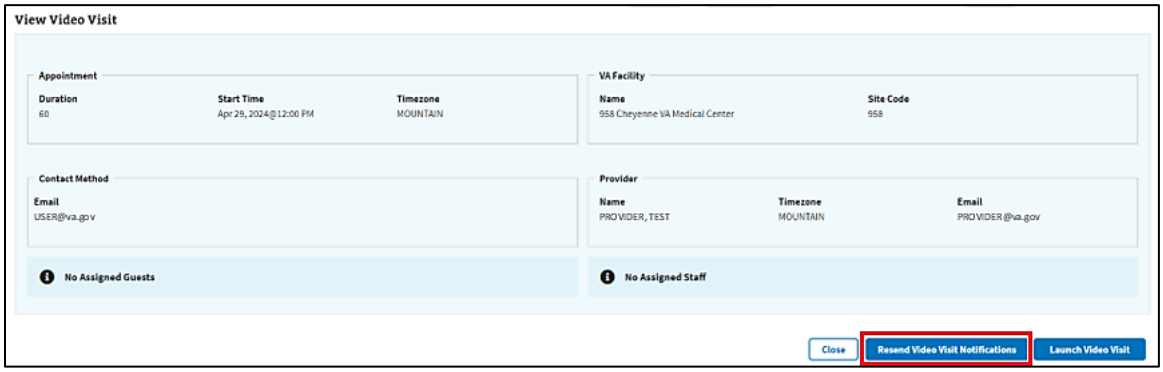


Figure 232: Resend Video Visit Notification Button

4.5.5 Cancelling Video Visits

To cancel a video visit, please follow the steps outlined in either **4.4.3 Cancel an APPT, PtCSch, Consult/Procedure, RTC, or VETERAN Appointment** or **4.4.4 Cancel an MRTC Appointment.**

4.5.6 Launch Video Visit

1. To launch a video visit, the user will select the ellipsis, seen in **Figure 233**, next to the appointment within the Pending grid under Appointments.

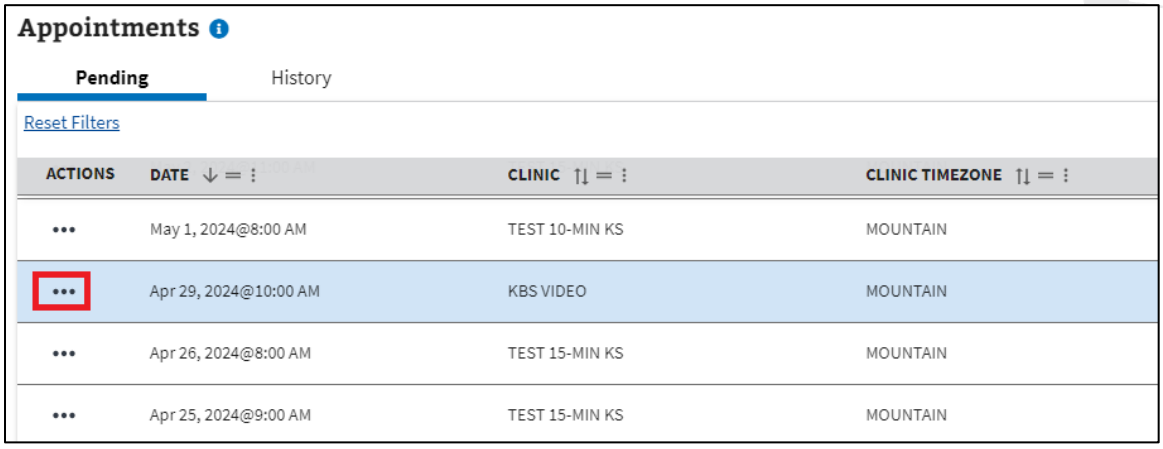


Figure 233: Action Menu Button to Launch Video Visits

2. This will cause the action menu to appear. The user will then need to select the "View" option, seen in **Figure 234**.

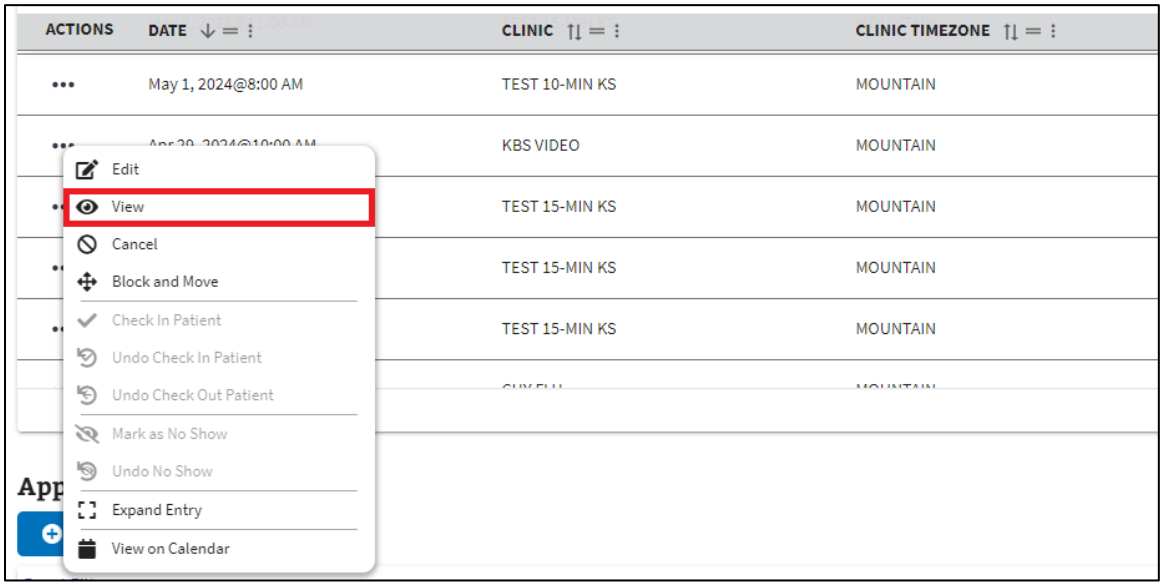


Figure 234: View Option for Launching Video Visits from the Pending Appointments Action Menu

3. The user will be brought to the View Appointment page. On this page, the user will need to select the “View Video Visit” button, seen in **Figure 235**, to continue to the View Video Visit page.

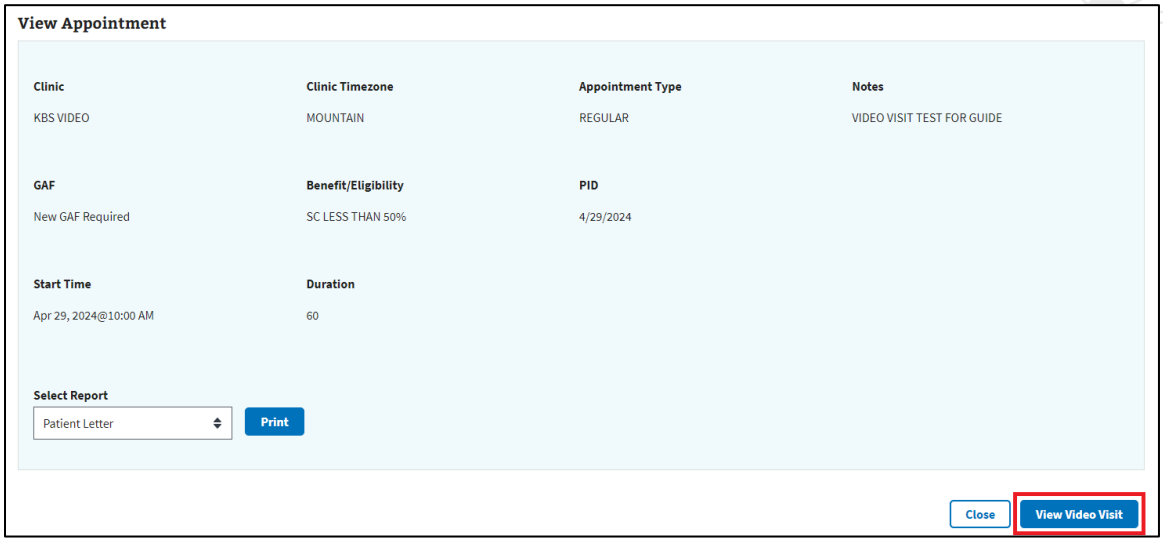


Figure 235: View Video Visits Button for Launching Visit

4. On the View Video Visit page, the user will need to select the “Launch Video Visit” button, seen in **Figure 236**, to launch the video visit. This will redirect the user to an external website where the video visit will be conducted.

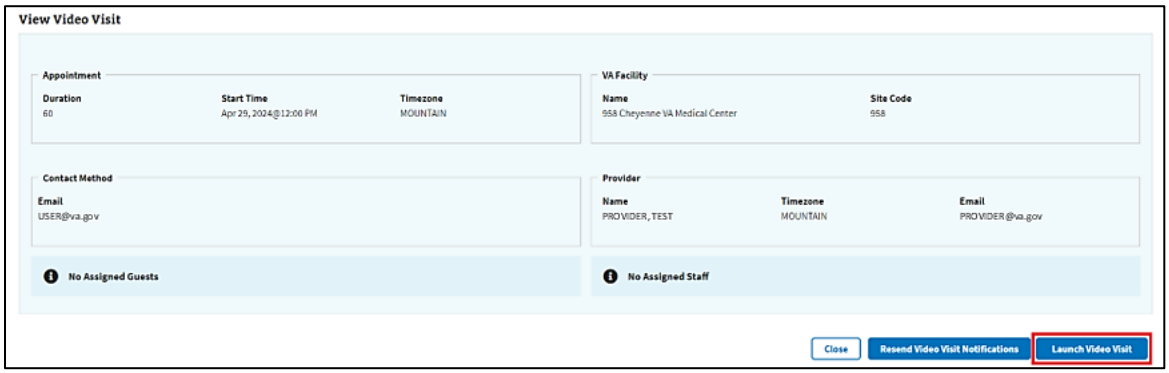


Figure 236: Launch Video Visit Button

4.6 Printing and Exporting Reports for Appointments and Requests

4.6.1 Export an Appointment Requests Report

1. To export a report, the user will need to select the “Export” button shown in **Figure 237**.

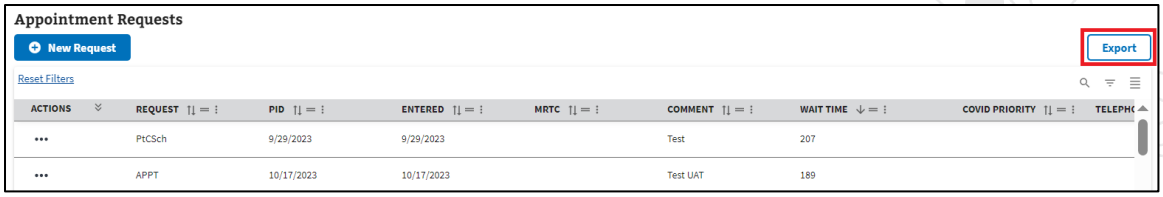


Figure 237: Export Button for Appointment Requests

2. The user will then be prompted to open or save an Excel worksheet, where the ability to print the list is accessible.

4.6.2 Print for Appointments

From the Appointments & Requests page, users have the ability to print a Pending Appointment(s) list and a Scheduled Appointment(s) list. The Pending Appointment(s) list will show all future appointments, including those that have been cancelled, whereas the Scheduled Appointment(s) list will only show all future to-be-attended appointments for the patient.

1. To print a Pending Appointment(s) list or a Scheduled Appointment(s) list, the user will need to select the "Print" button shown in **Figure 238**.

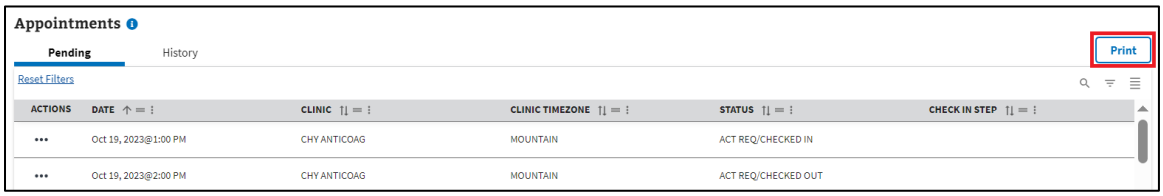


Figure 238: Print Button for Appointment List Options

2. The user will then select either "Print Pending" for the Pending Appointment(s) list or "Patient Friendly Print" for the Scheduled Appointment(s) list, as seen in **Figure 239**.

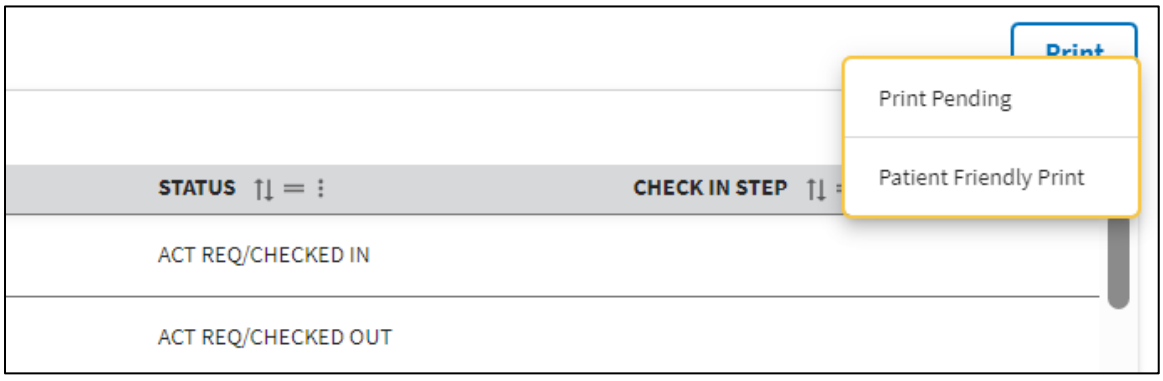


Figure 239: Appointment Print Options

3. This will prompt the user to open or save a PDF file, where the ability to print the list is accessible.

5. Calendar Search

5.1 Clinic Search

1. To search for a clinic, the user will select the search bar, seen in **Figure 240**, and enter a valid clinic name. Once the information has been entered, a list of clinics will appear in the dropdown.

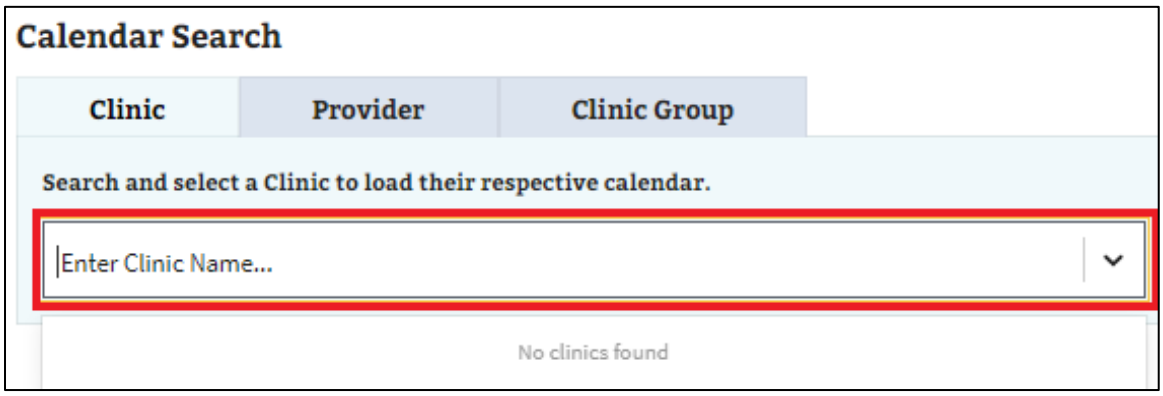


Figure 240: Search Bar for Clinic Search

2. The user can then select their preferred clinic from the available options to be taken to the Time Slot Calendar for the clinic, as shown below in **Figure 241**. On this page, the user is able to view available timeslots within the clinic.

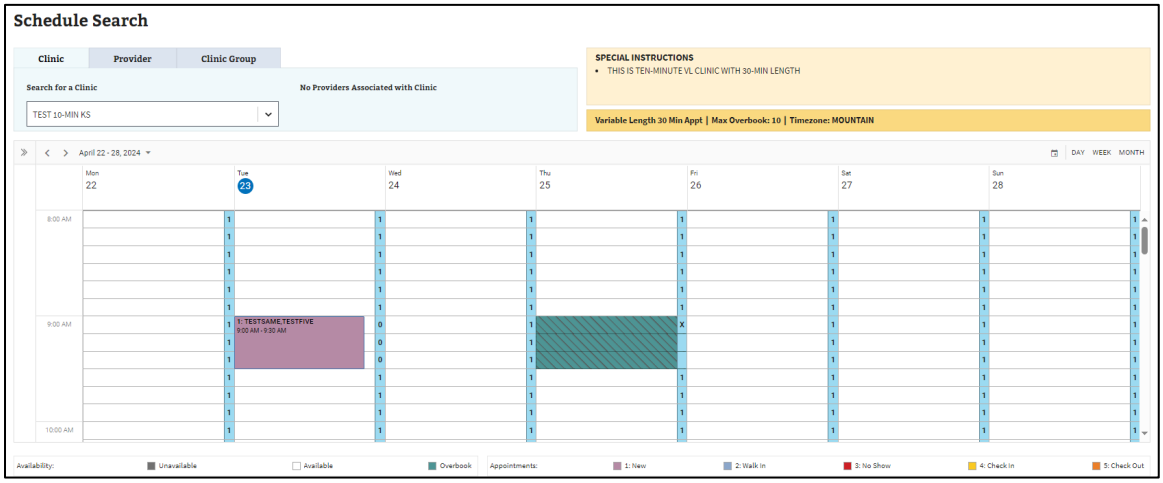


Figure 241: Clinic Calendar Example

5.2 Provider Search

1. To search for a provider, the user will first need to select the “Provider” tab shown in **Figure 242**.

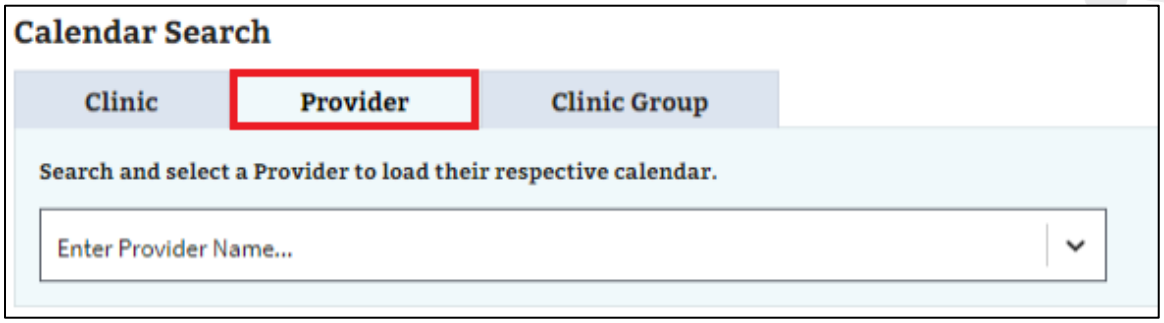


Figure 242: Provider Tab

2. The user will then select the search bar, seen in **Figure 243**, and enter a valid provider name. Once the information has been entered, a list of providers will appear in the dropdown.

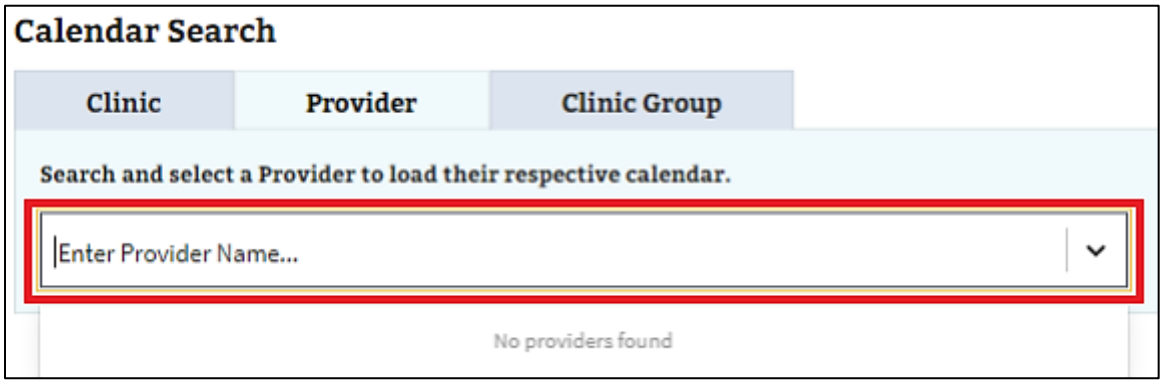


Figure 243: Provider Search Bar

3. After selecting the preferred provider from the available options, the user will be brought to the Time Slot Calendar for the selected provider. The user can view available timeslots on this page within the associated clinics of the provider, as seen in **Figure 244**.

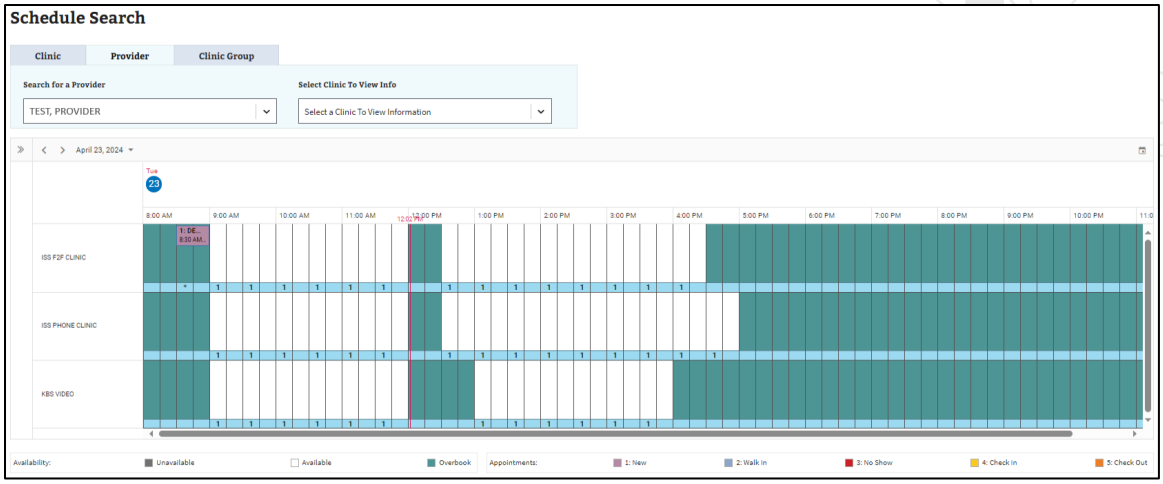


Figure 244: Provider Calendar Example

- *Note: The user is able to view information about a clinic by selecting a clinic within the dropdown shown in **Figure 245**.*

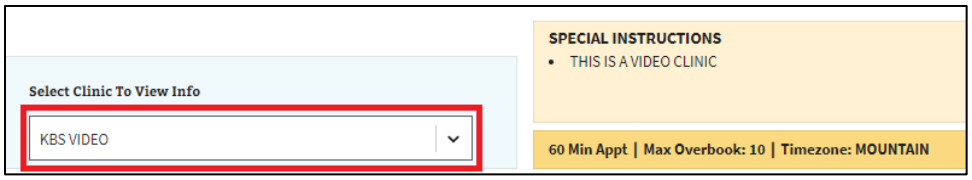


Figure 245: Dropdown to Select a Clinic for Information on Provider Calendar

5.3 Clinic Group Search

1. To search for a clinic group, the user will first need to select the "Clinic Group" tab shown in **Figure 246**.

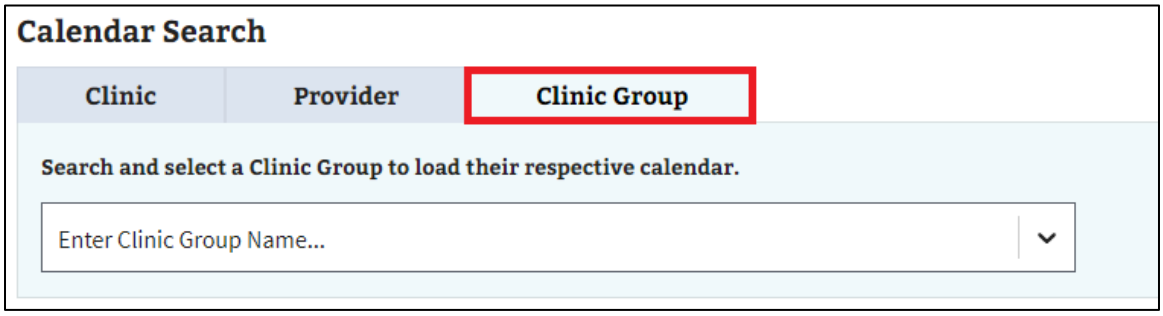


Figure 246: Clinic Group Tab

2. The user will then select the search bar, seen in **Figure 247**, and enter a valid clinic group name. Once the information has been entered, a list of clinic groups will appear in the dropdown.

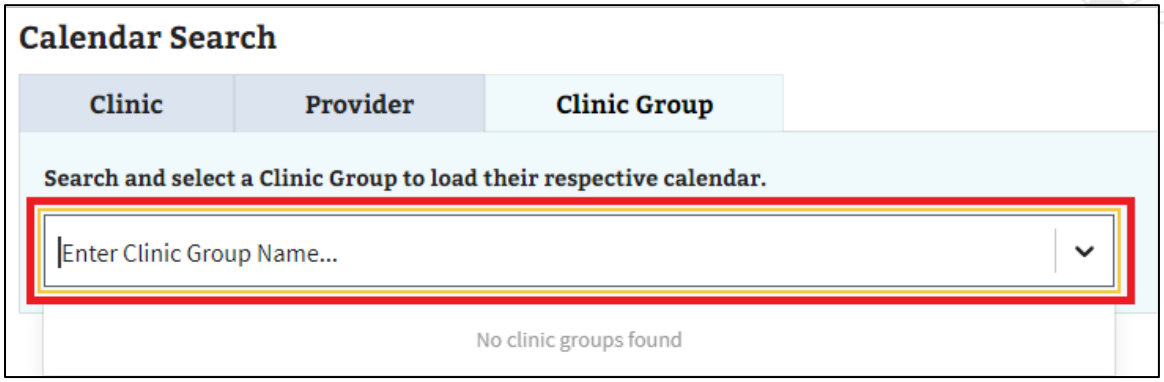


Figure 247: Clinic Group Search Bar

3. After selecting the preferred clinic group from the available options, the user will be brought to the Time Slot Calendar, as shown below in **Figure 248**, for the selected clinic group. On this page, the user is able to view available timeslots from entities associated with the clinic group.

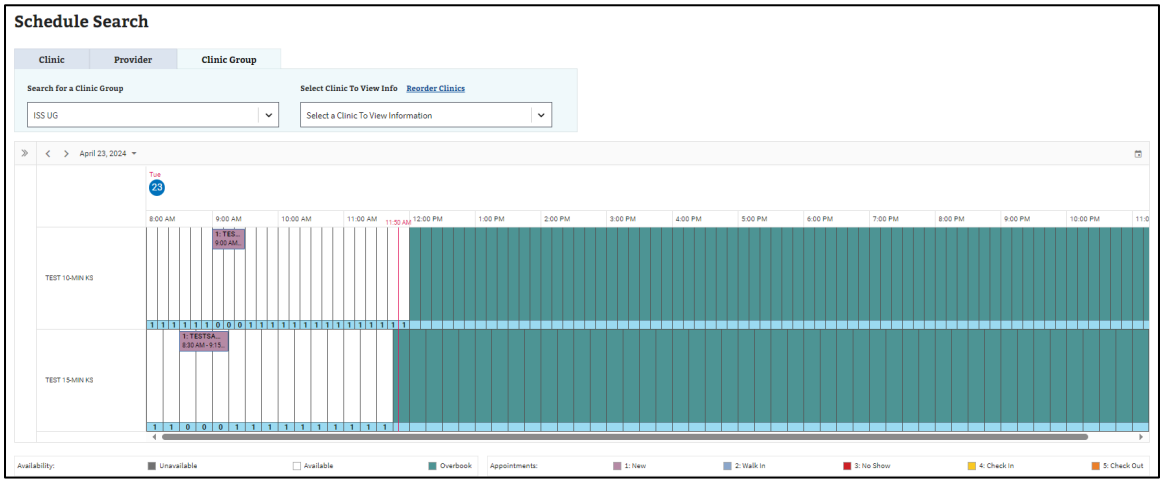


Figure 248: Clinic Group Calendar Example

- *Note: The user is able to view information about a clinic by selecting a clinic within the dropdown shown in **Figure 249**.*

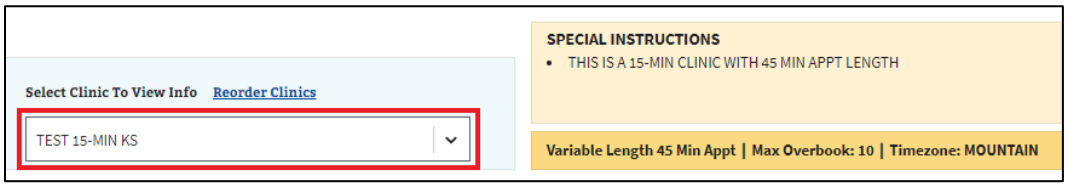


Figure 249: Dropdown to Select a Clinic for Information on Clinic Group Calendar

❖ *Note: The user has the ability to reorder the clinic order. To do so, the user will need to select "Reorder Clinics," shown is **Figure 250**, then drag and drop the clinics into their preferred order. Once completed, the user will need to select "OK" to save the changes.*

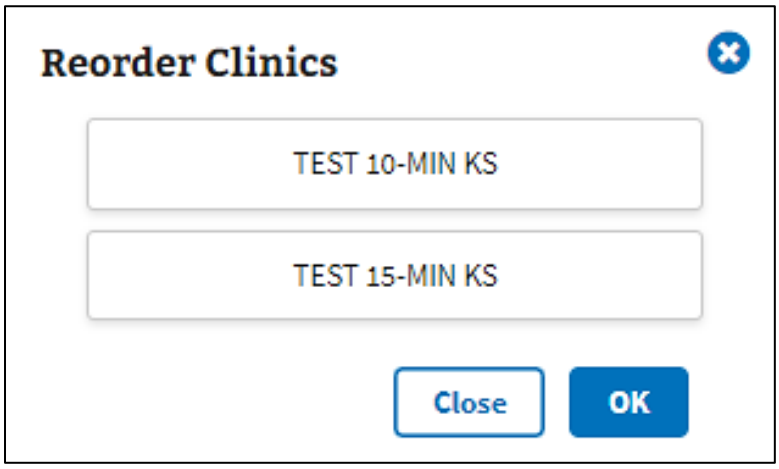


Figure 250: Reorder Clinics Window

5.4 Create Walk-in

1. To create a walk-in, the user will first need to follow the steps outlined in **3.1 Patient Search** to bring a patient into context. Then, the user will need to navigate to the intended calendar by following the steps in any of the following; **4.4.12 Calendar View**, **5.1 Clinic Search**, **5.2 Provider Search**, or **Clinic Group Search**.
2. Once a patient has been brought into context, the user will be able to right click on the preferred timeslot within the calendar and select "Create Walk-in," seen in **Figure 251**.

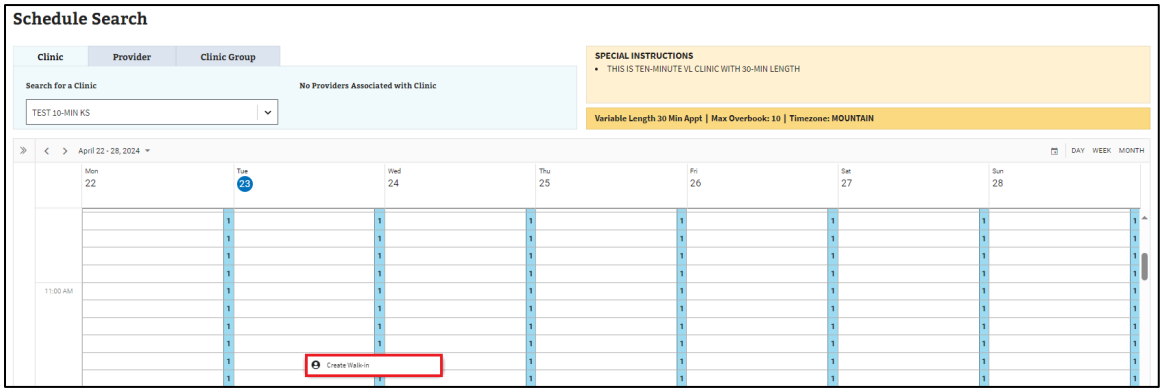


Figure 251: Create Walk-in Button on Calendar

3. The user will be brought to the New Walk-in Appointment page. On this page, the user will need to fill out all the required information displayed in **Figure 252**. The user can also fill out any optional information as needed.

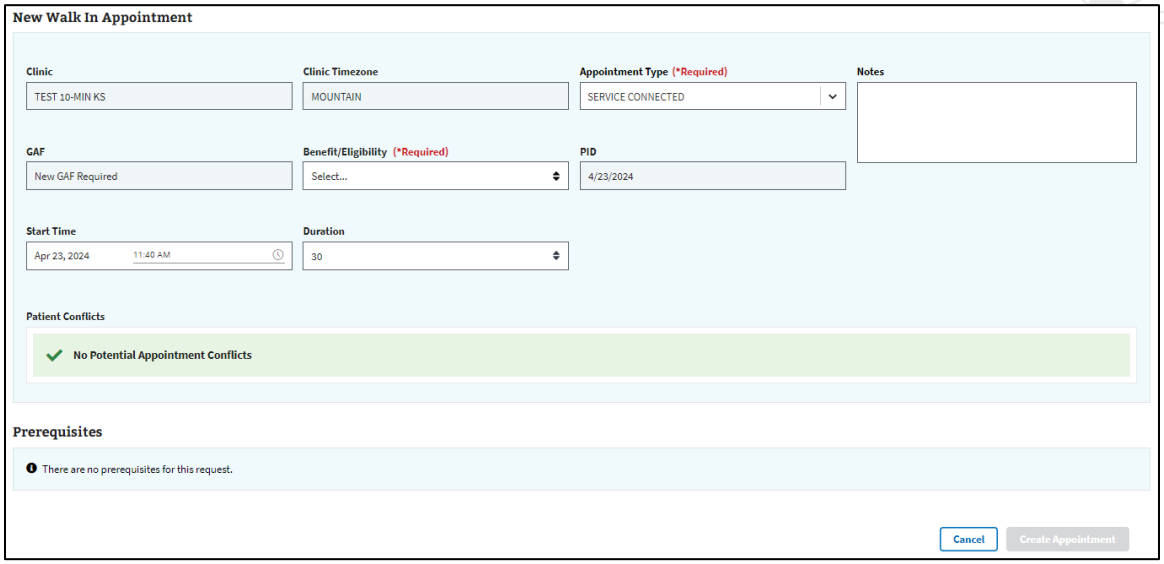


Figure 252: New Walk- in Appointment Page

4. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 253**, to create the walk-in appointment.

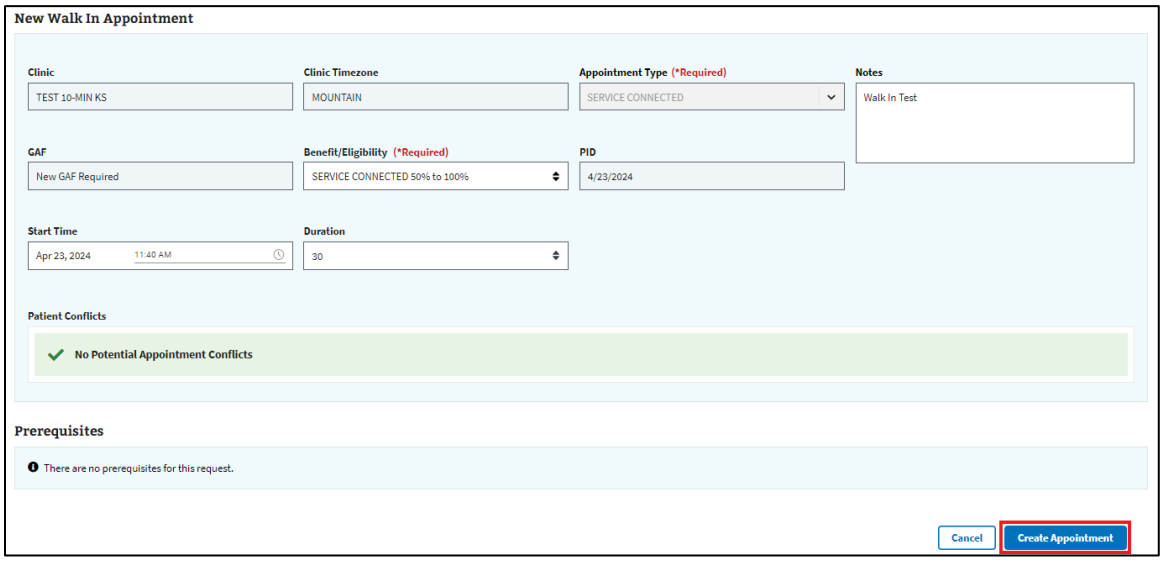


Figure 253: Create Appointment Button for New Walk-in

- *Note: The user can also select the "Cancel" button seen in **Figure 253** to exit creating an appointment and go back to the Appointments & Requests page.*

8. The Appointment Successfully Created window, shown below in **Figure 254**, will appear. The user can choose to preview the patient letter, if needed, or select “Close” to continue.

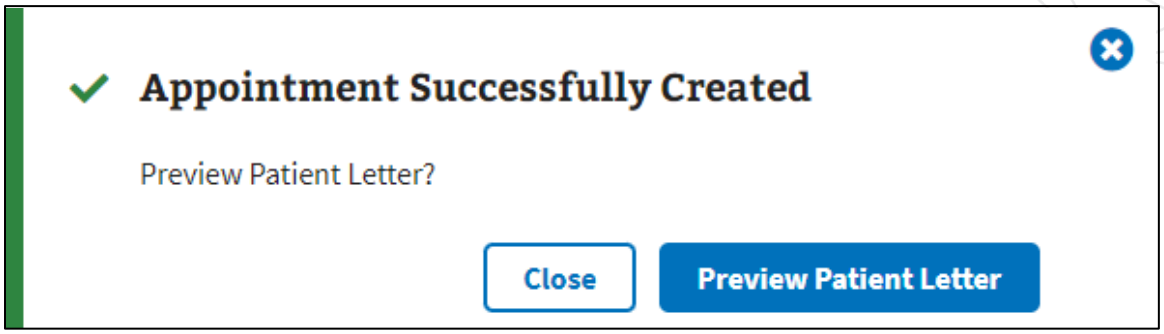


Figure 254: Preview Patient Letter Window for Walk-in Appointment

6. Query Tool

The user will need to navigate to the home screen to find the Query Tool. Please see **Figure 255** below for an overview on how to perform a query and the rules associated for each section. Please note that only the first 200 search results will appear in each query.

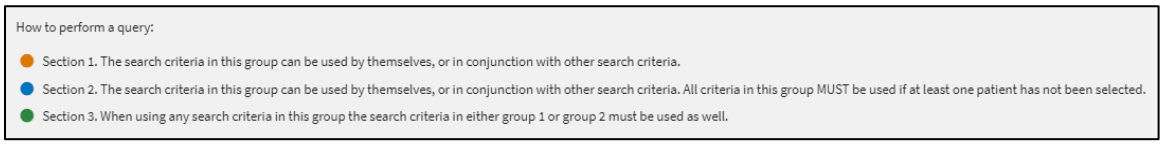


Figure 255: Overview for How to Perform a Query

Once the minimum amount of search criteria has been made and the user is ready to make a search, it may be helpful to utilize the Change Sort Order function for better results. Simply select the dropdown under Change Sort Order and select the desired option. Please note that the “Default” sort order is Priority Group, PID, and Origination Date.

6.1 Section 1

1. Within the query tool, the user will find section 1 where patients will need to be selected for the query. To begin, the user will select the search bar under Patients, seen in **Figure 256**, and enter valid search criteria. A dropdown will appear with a list of patients that match the criteria given.

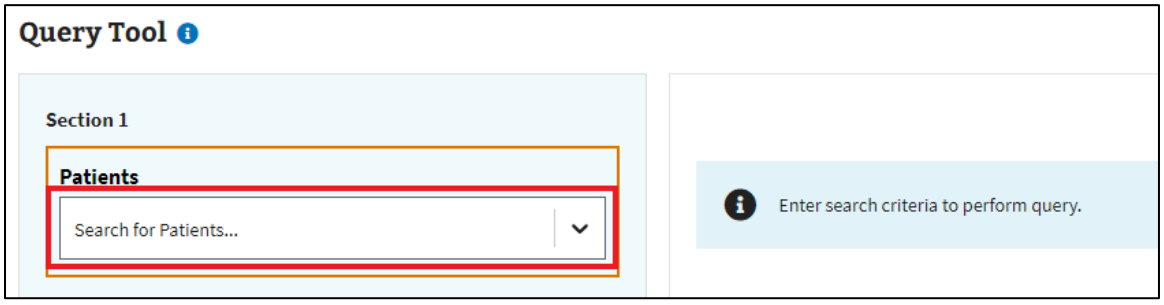


Figure 256: Dropdown to Select a Patient for Section 1 of Query Tools

2. The user can then select the needed patient from the available options.
3. Repeat steps 1 and 2 for as many patients the user wishes to include in the query.
    - ❖ *Note: The maximum number of patients that can be included in a query search is 50.*
    - ❖ *Note: If the user needs to remove any previously selected patients, select either the "x" button next to any individual patient in the Patients field, or select "x" shown in **Figure 257** to remove all previously selected patients.*

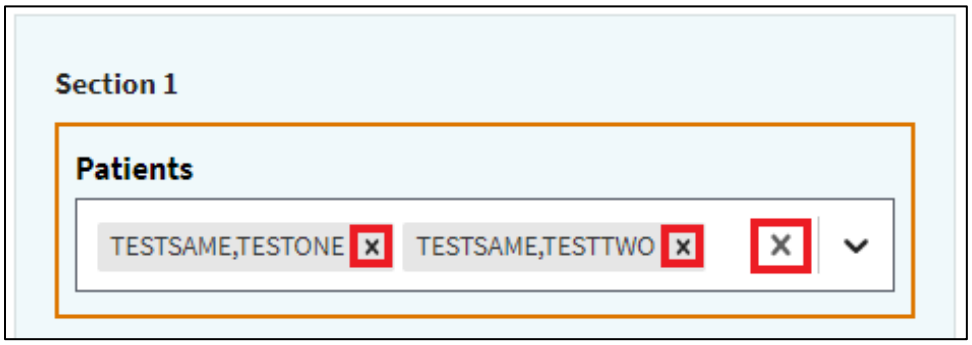


Figure 257: Remove Previously Selected Patient Icon

4. After selecting the patients needed, the user can run the query by selecting "Run Query," shown in **Figure 258**. Optionally, the user can narrow down search results by following the steps outlined in either **6.2 Section 2** or **6.3 Section 3**.

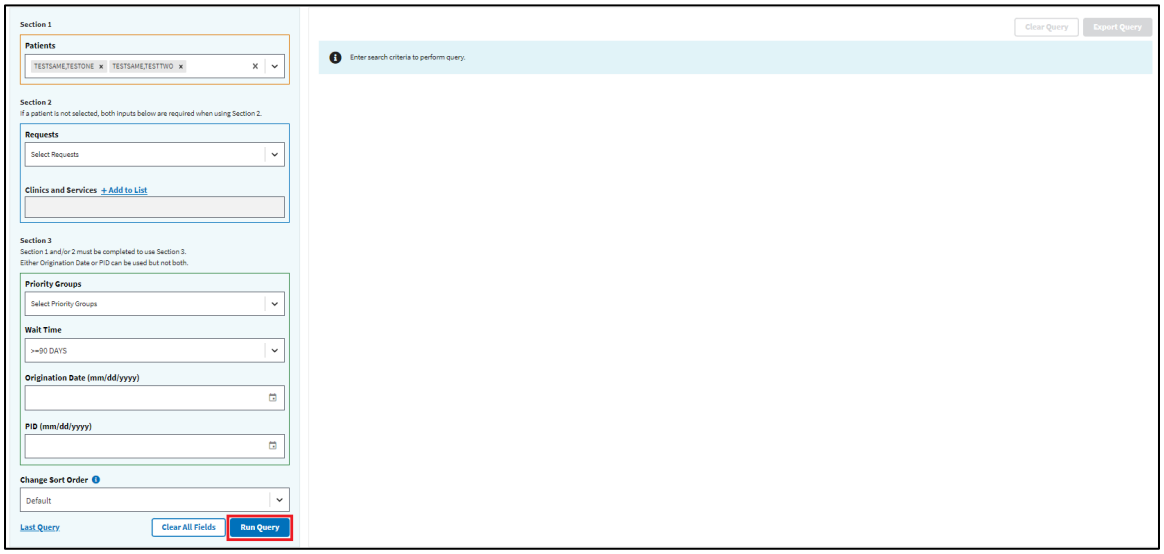


Figure 258: Run Query Button using Section 1 of Query Tools

6.2 Section 2

1. Within the query tool, the user will find section 2. To begin, the user will select the dropdown under Requests, seen in **Figure 259**, and choose a given request option. The user can individually add different requests or choose “Select All” to add all the options shown.

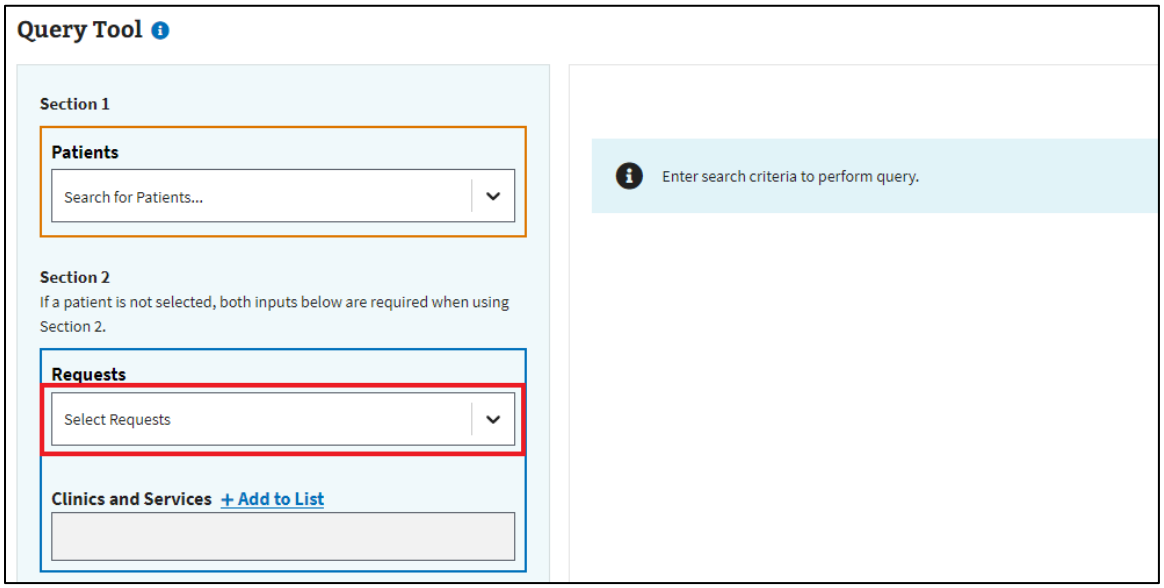


Figure 259: Dropdown to Select a Request for Section 2 of Query Tools

2. The user must then select “+ Add to List,” seen in **Figure 260**, to open the Clinics/Services window.

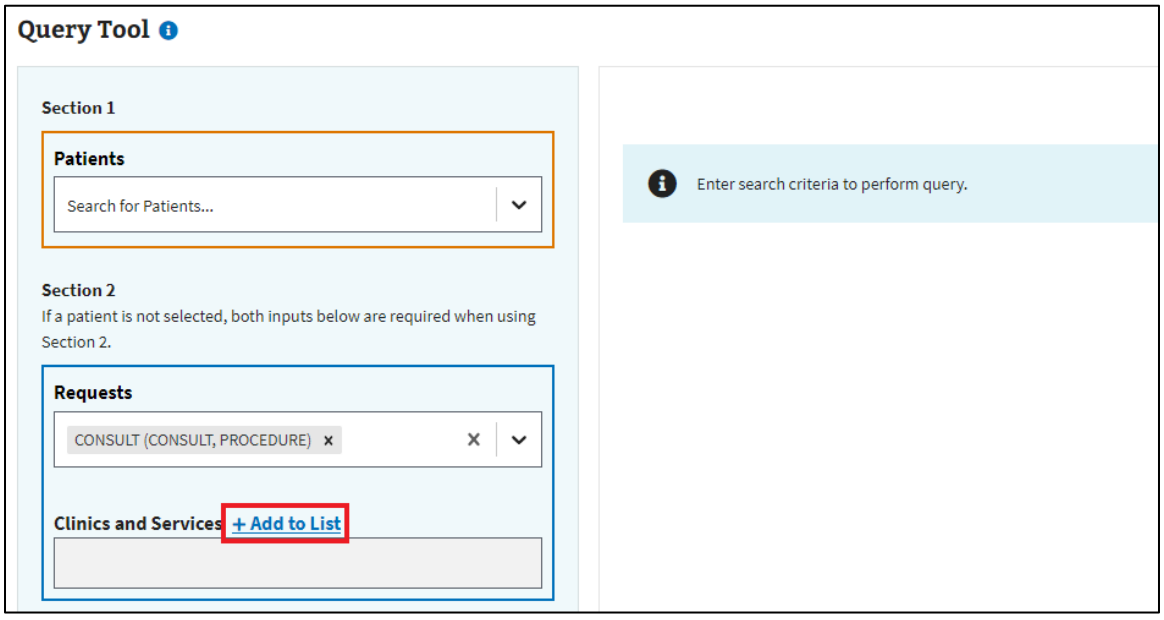


Figure 260: Button to Add Clinics and Services in Section 2 of Query Tools

3. After selecting the search bar shown in **Figure 261** below, the user will need to enter valid search criteria. This will cause any applicable results to appear in the box below.

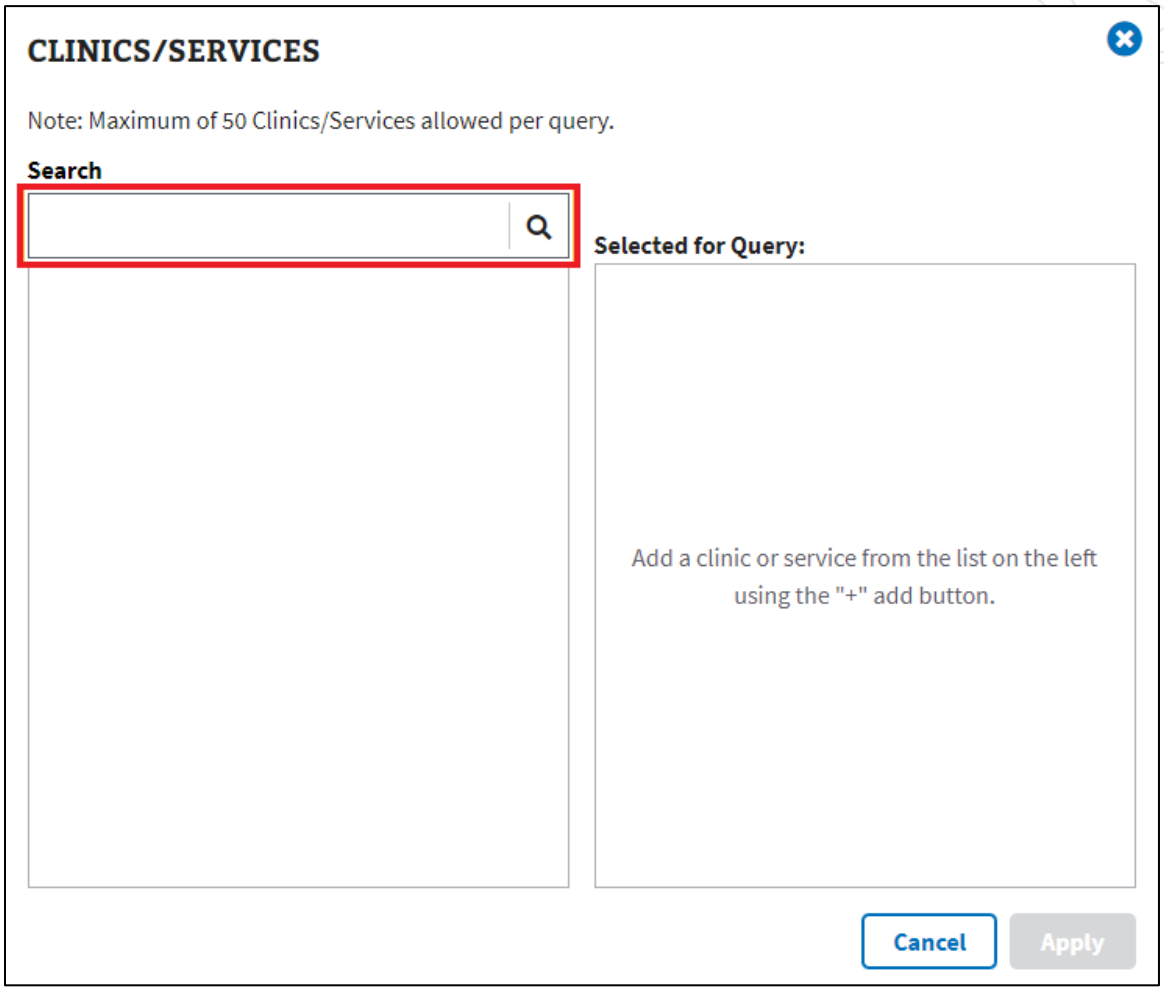


Figure 261: Search Bar for Clinics/Services for Section 2 of Query Tools

4. The user will then need to either select the add button next to any individual Clinic/Service option or can select the “Add All” button shown in **Figure 262** to add all the options listed.

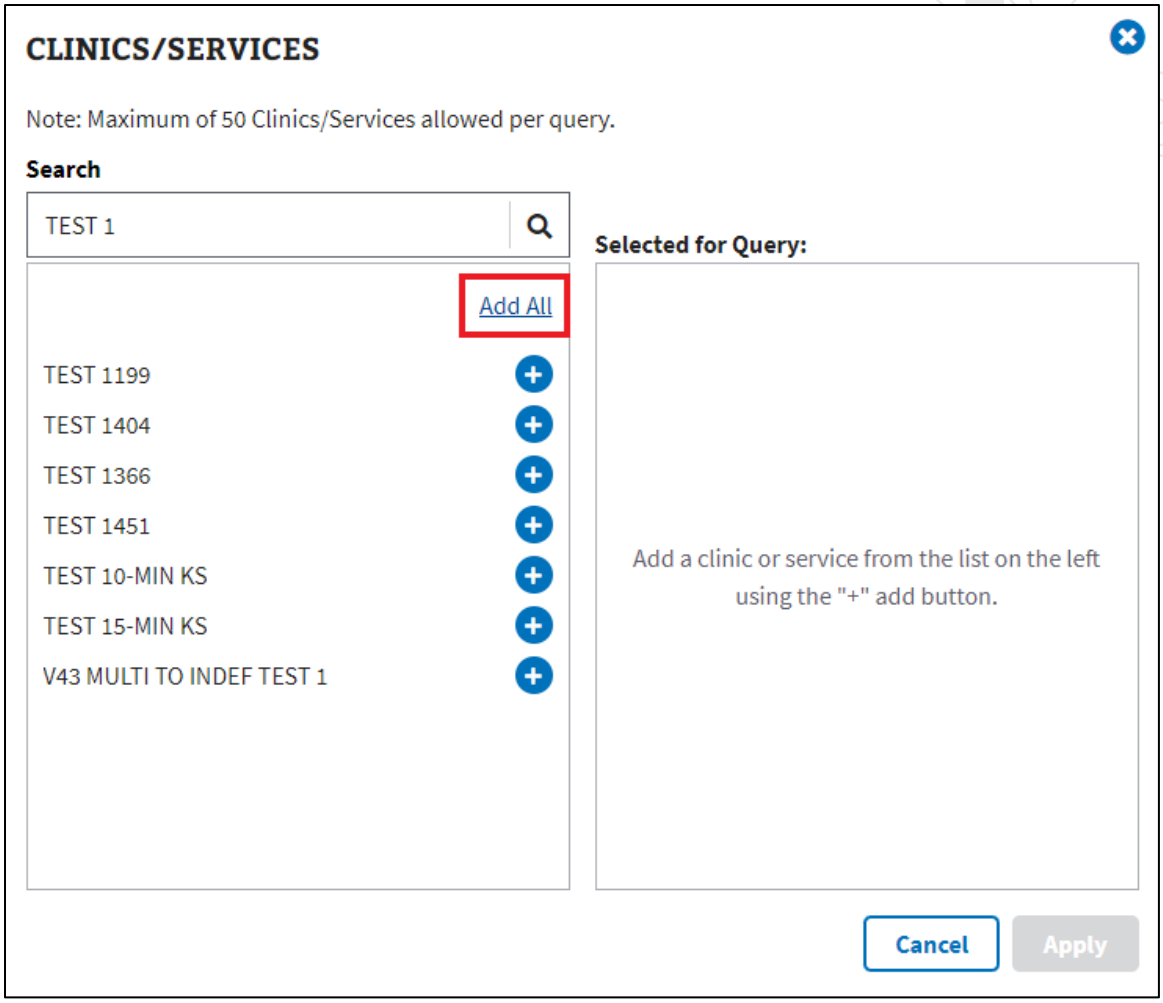


Figure 262: Button to Add All Clinics/Services

- *Note: If the user needs to remove any previously selected Clinics/Services from the query, the user can select either the remove button next to an individual Clinic/Service in the Selected for Query section or select the "Remove All" button shown in **Figure 263** to remove all the options listed.*

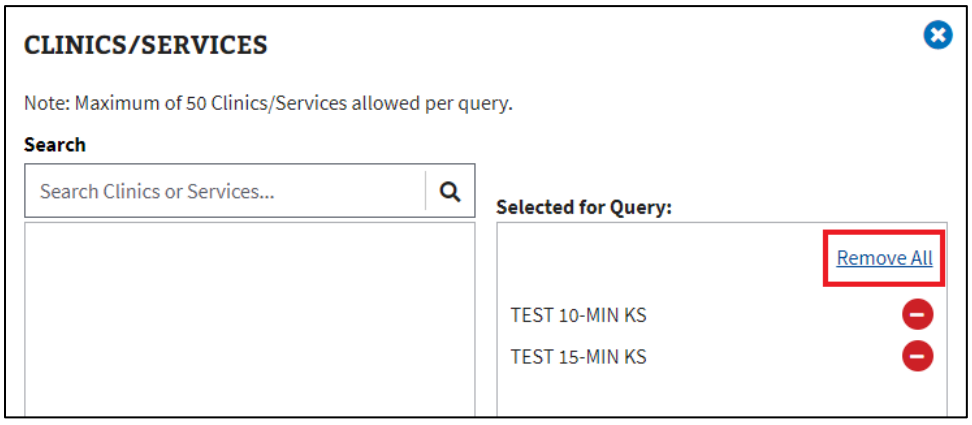


Figure 263: Button to Remove All Clinics/Services

5. The user will then select the “Apply” button, as seen in **Figure 264**, to be brought back to the query tool with any selected results applied.

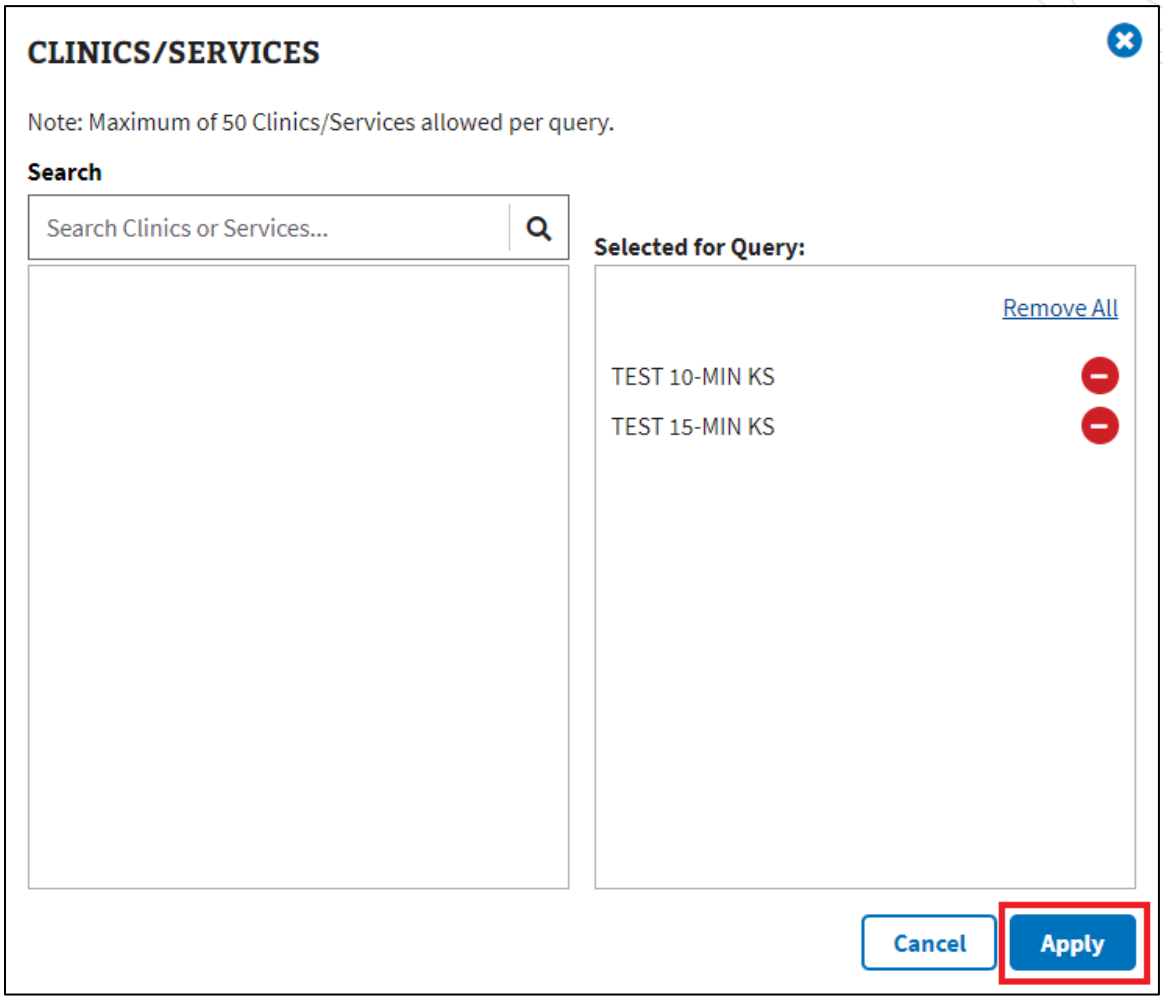


Figure 264: Apply Button for Clinics/Services for Section 2 of Query Tools

6. After filling the required fields, the user can run the query by selecting “Run Query,” shown in **Figure 265**. Optionally, the user can narrow down search results by following the steps outlined in either **6.1 Section 1** or **6.3 Section 3**.

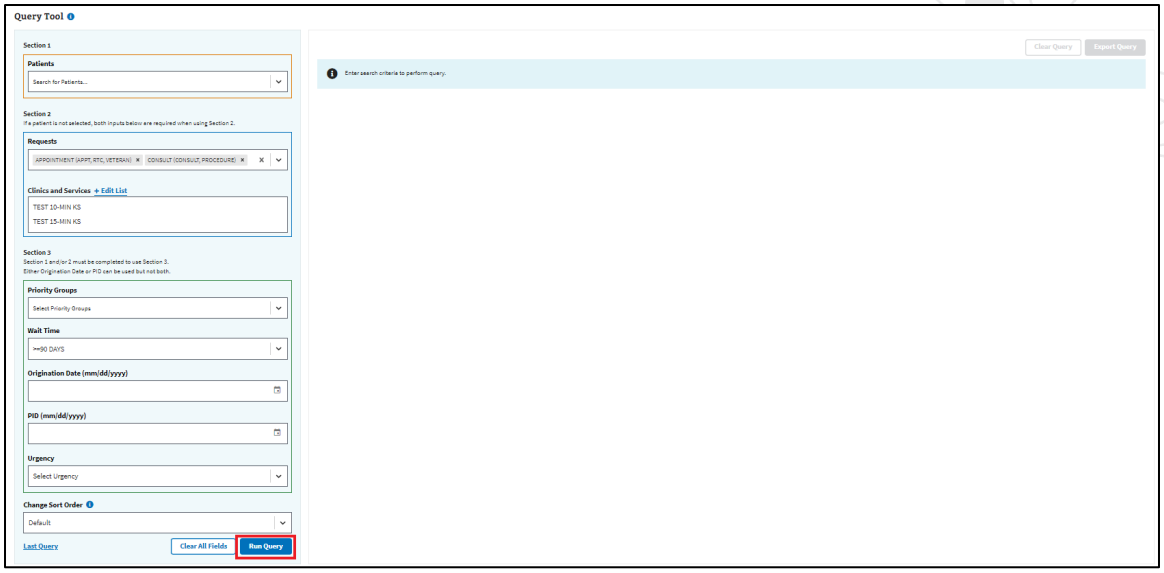


Figure 265: Run Query Button using Section 2 of Query Tools

6.3 Section 3

Please note that all search criteria within section 3 is optional. If using section 3, the user must have entered search criteria into either Section 1, Section 2, or both.

1. To begin, the user can select the dropdown under Priority Groups, seen in **Figure 266**, and choose a given priority group option. The user can individually add different priority groups or choose "Select All" to add all the options shown.

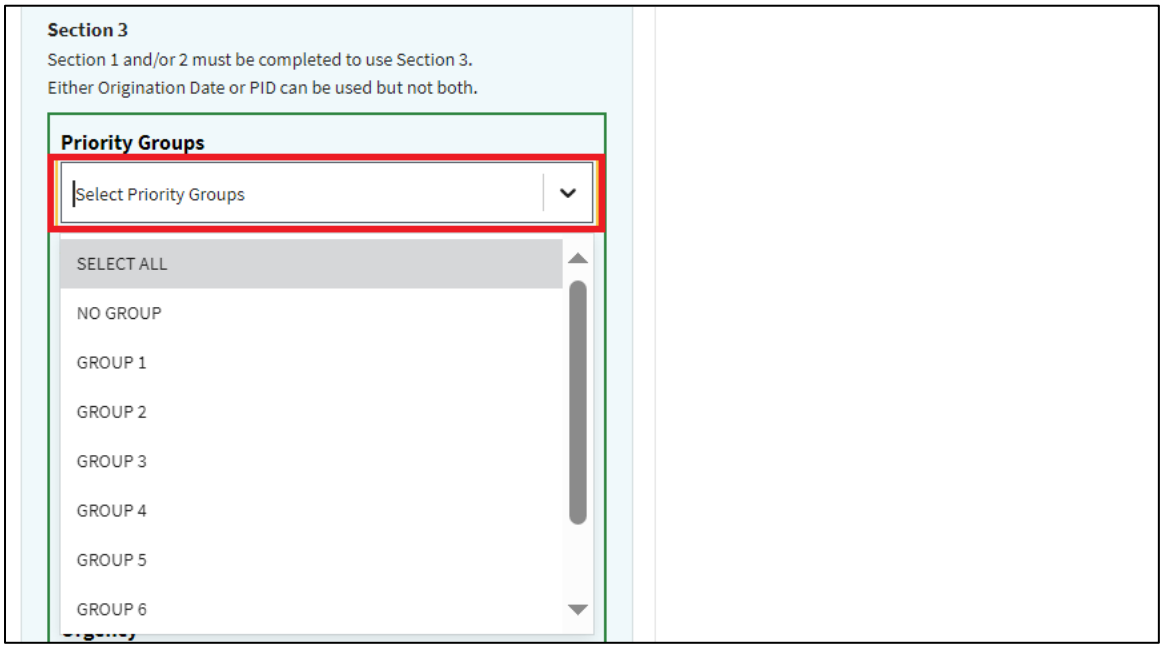


Figure 266: Dropdown to Select a Priority Group for Section 3 of Query Tools

2. The user can select the dropdown under Wait Time, seen in **Figure 267**, and choose the preferred wait time length. The user can choose “All Days” to view all wait times options.

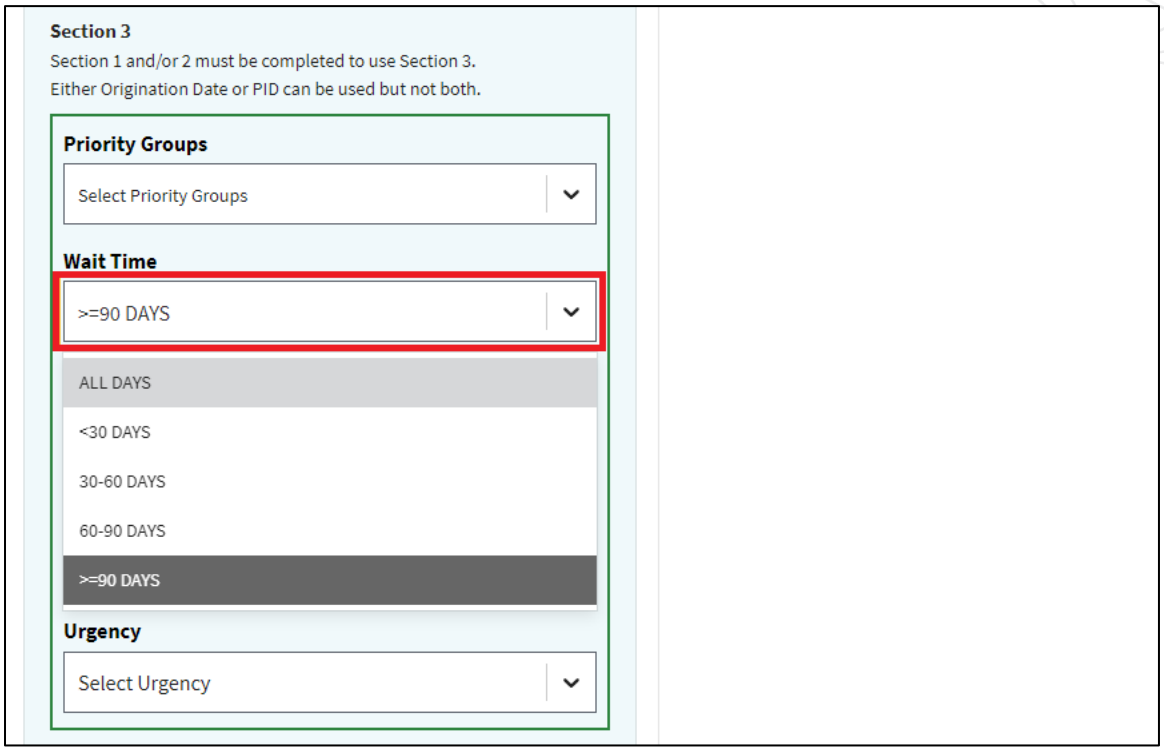


Figure 267: Dropdown to Select a Wait Time for Section 3 of Query Tools

3. When narrowing down a specific date, the user can select either an origination date, or PID (not both), if needed.

4. If consult was chosen as a requests option from Section 2, the user can select an urgency type by navigating the dropdown selections, as seen in **Figure 268**.

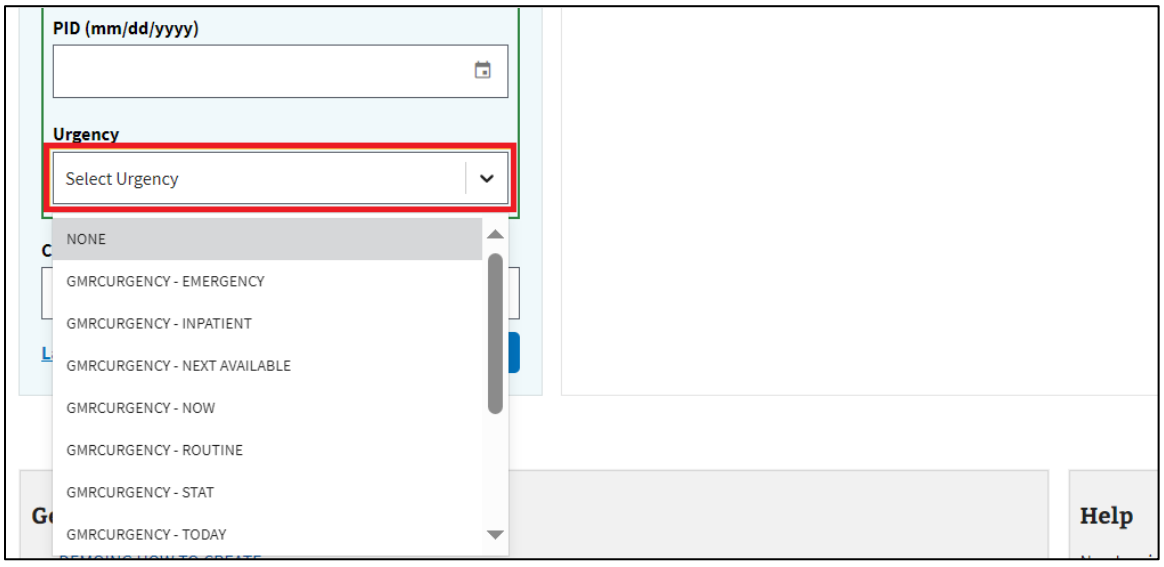


Figure 268: Dropdown to Select an Urgency Status for Section 3 of Query Tools

7. System

This section of the guide is only applicable to users who have been provisioned the SDECZMGR key. To access, select the System tab, seen in **Figure 269**, at the top of the webpage.

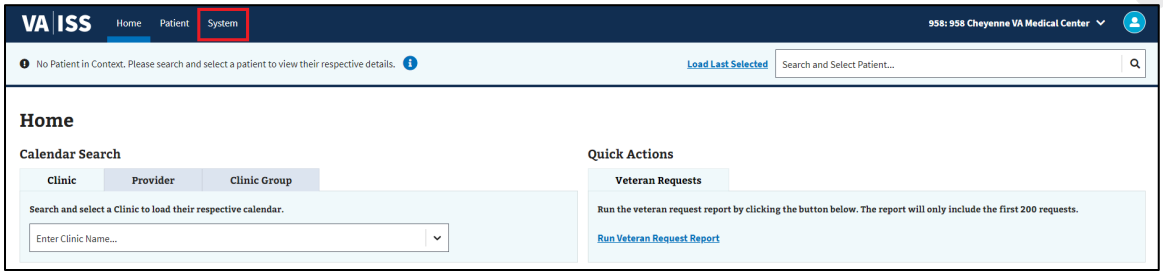


Figure 269: Systems Tab on the Homepage

7.1 Privileged Users

1. To add or remove Privileged Users, the user will need to select the "Privileged Users" tab shown in **Figure 270**.

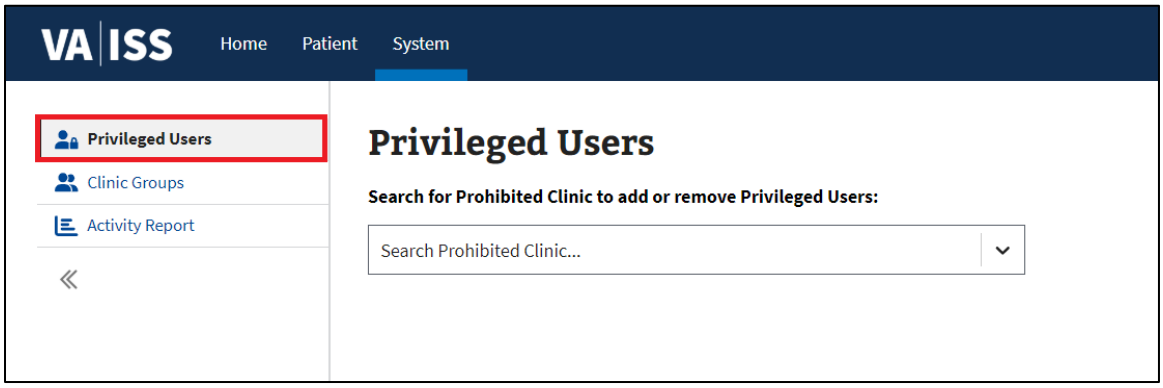


Figure 270: Privileged Users Tab

2. The user will then need to enter the name of a prohibited clinic into the search bar. This will cause any applicable results to appear in a dropdown, as seen in **Figure 271** below, where the user can select the intended clinic.

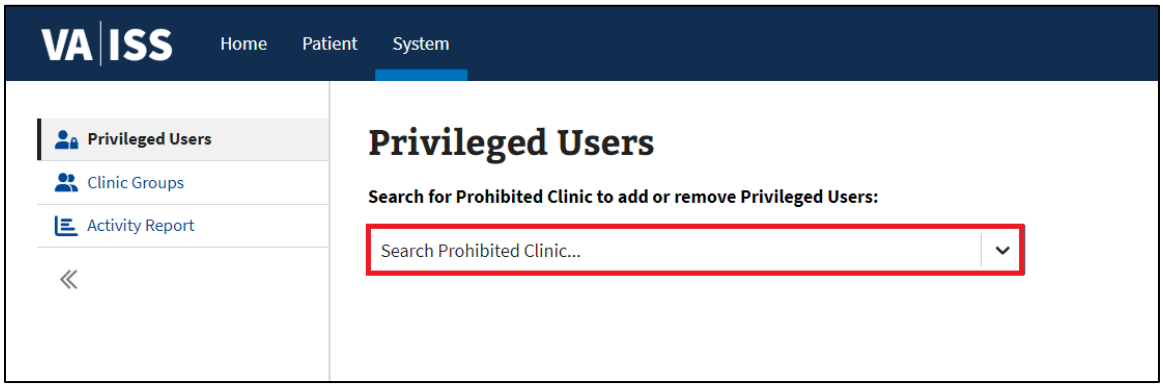


Figure 271: Search Bar for Privileged Users

3. The (Clinic Name) window will appear. From here, the user can either search for a user by manually scrolling through the Users section or filter the results by typing in a user's name into the Search Users search bar, seen in **Figure 272**. Once the necessary user is found, select the add button next to the name. Repeat this step for each user that needs to be added to the prohibited clinic.



Figure 272: Search Users Look Up for Clinics Under Privileged Users

- *Note: If the user needs to remove any previously selected users, select either the remove button next to any individual user, or select the "Remove All" button shown in **Figure 273** to remove all of the users listed.*

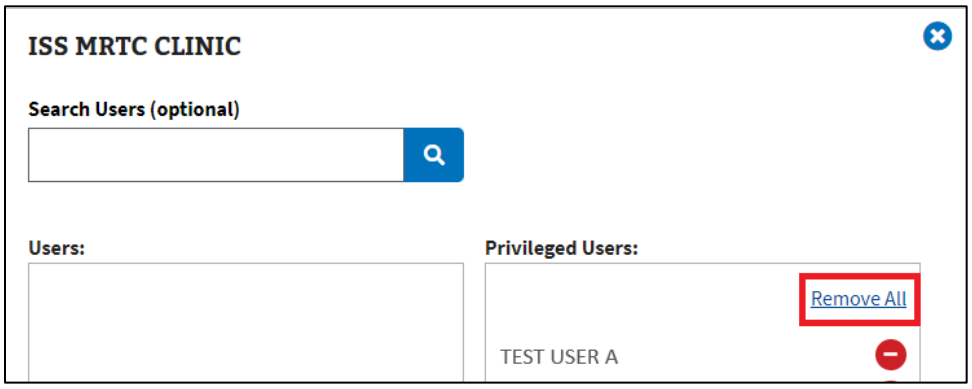


Figure 273: Button to Remove All Users from a Clinic

4. Once all Privileged users have been added, select the "Save Changes" button, seen in **Figure 274**, to save all changes.

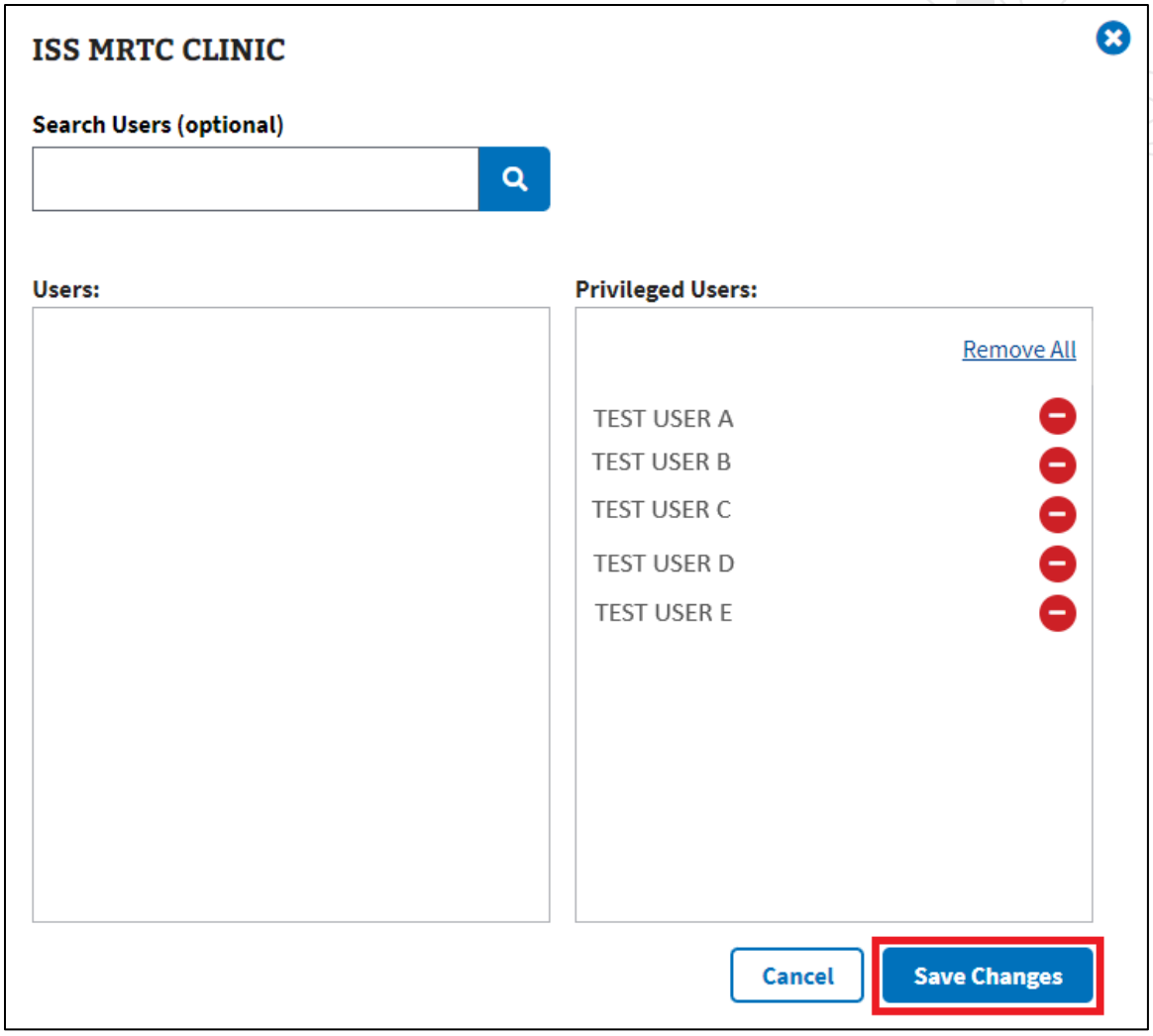


Figure 274: Save Changes Button for Privileged Users

7.2 Clinic Groups

7.2.1 Edit Clinic Group

1. To search for a Clinic Group, the user will need to select the "Clinic Groups" tab shown in **Figure 275**.

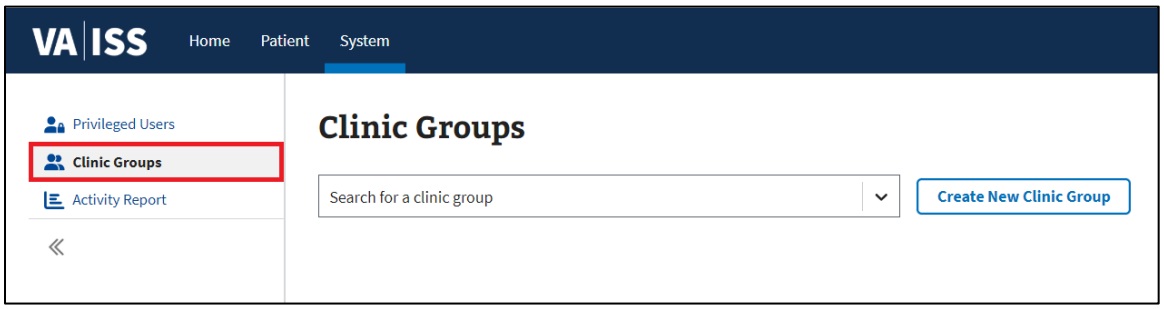


Figure 275: Selecting Clinic Groups Tab for Editing

2. The user will then need to enter the name of a clinic group into the search bar. This will cause any applicable results to appear in a dropdown, as seen in **Figure 276** below, where the user can select the intended clinic group.

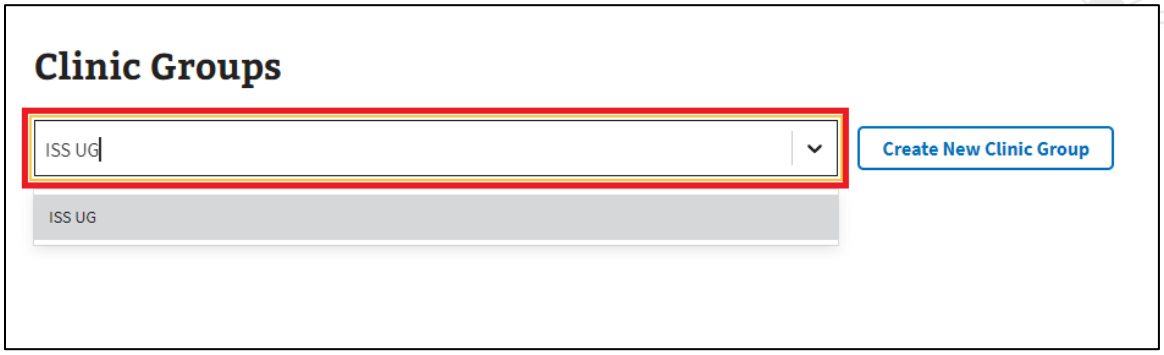


Figure 276: Search Bar for Finding a Clinic Group to Edit

3. The user will be brought to the (Clinic Group Name) page. From here, the user can select the "Edit Clinic Group" button, seen in **Figure 277**, to open the Edit Clinic Group window.

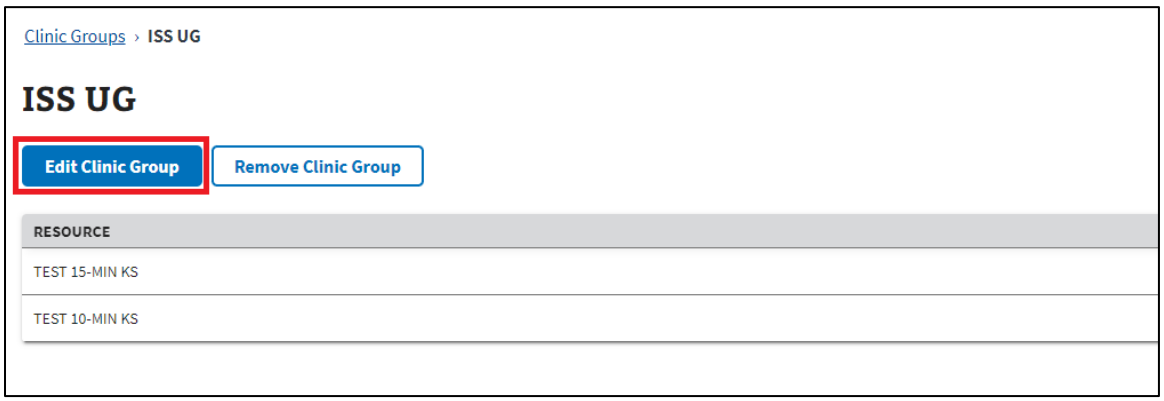


Figure 277: Edit Clinic Group Button

4. To change the clinic group name, select the field shown in **Figure 278** and make the necessary changes.



Figure 278: Field for Clinic Group Name when Editing a Clinic Group

5. To add resources, the user will need to enter valid search criteria into the search bar seen in **Figure 279**. This will cause any applicable results to appear in the box below.

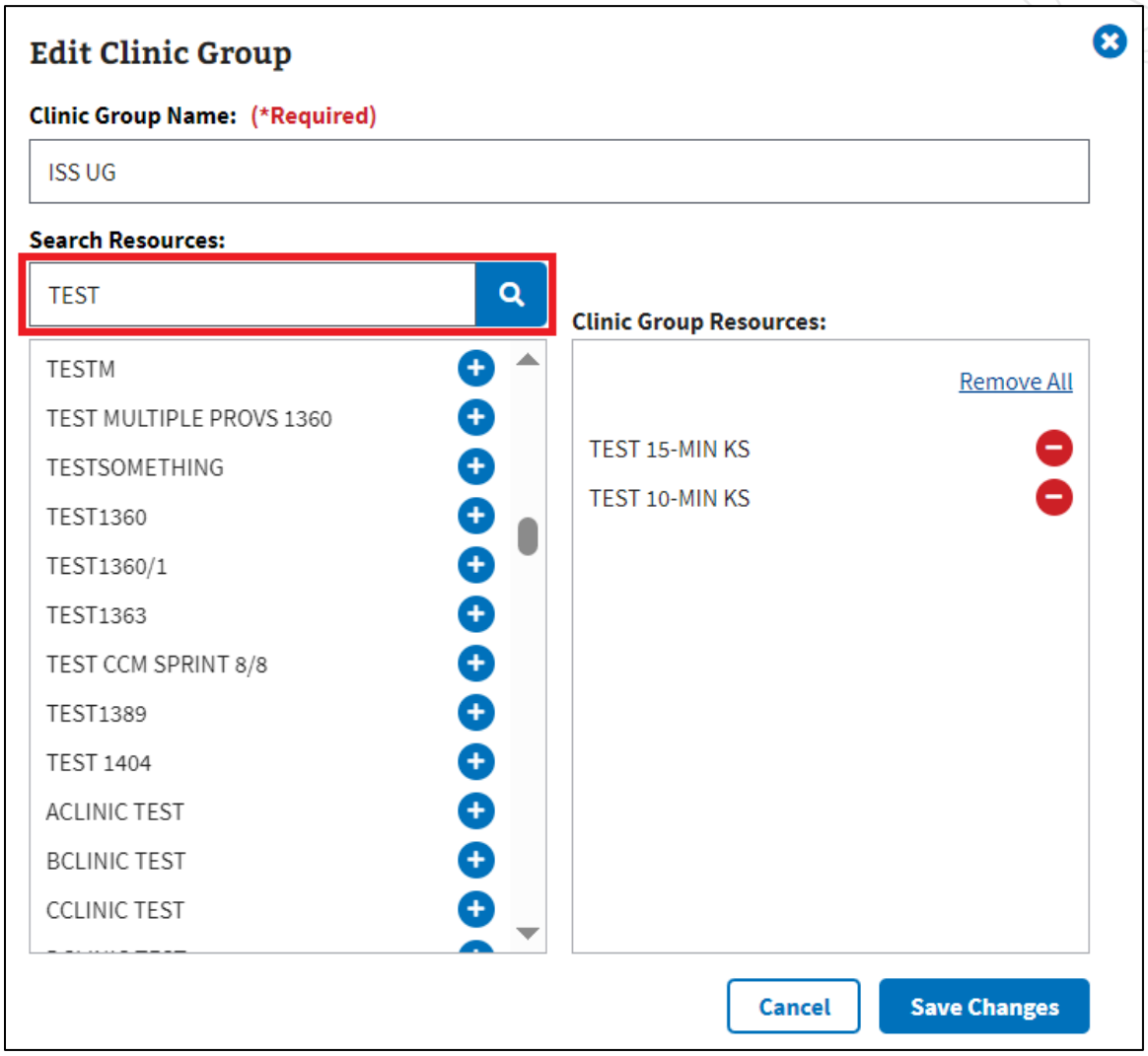


Figure 279: Search Bar to Find Resources when Editing a Clinic Group

7. The user will then need to either select the add button next to any individual resource option or select the "Add All" button shown in **Figure 280** to add all the options listed.

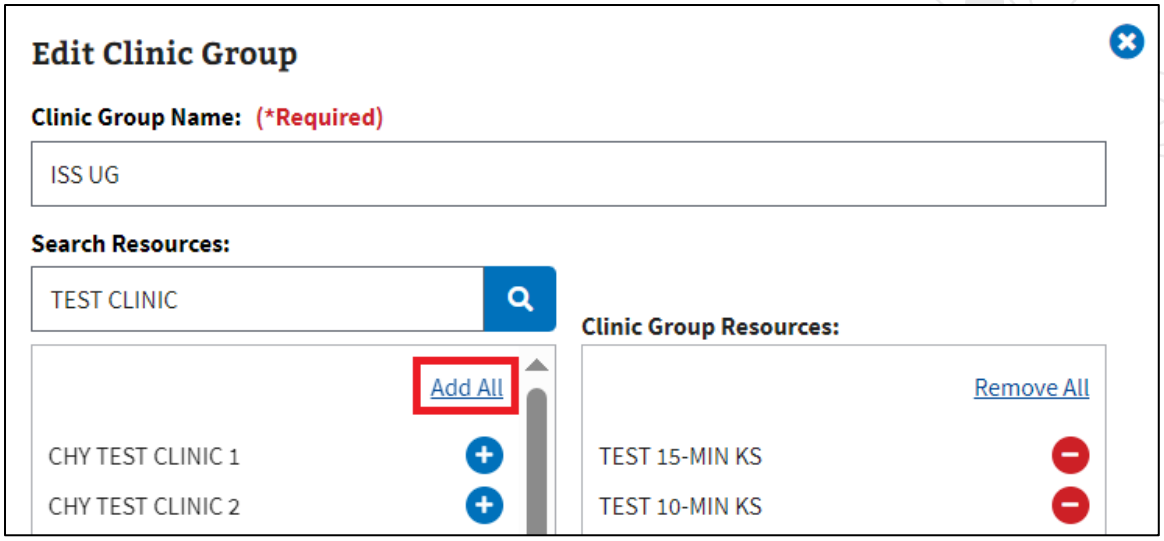


Figure 280: Button to Add All Resources when Editing a Clinic Group

- *Note: If the user needs to remove any previously selected resources, the user can select either the remove button next to an individual resource in the Clinic Group Resources section or select the "Remove All" button shown in **Figure 281** to remove all the options listed.*

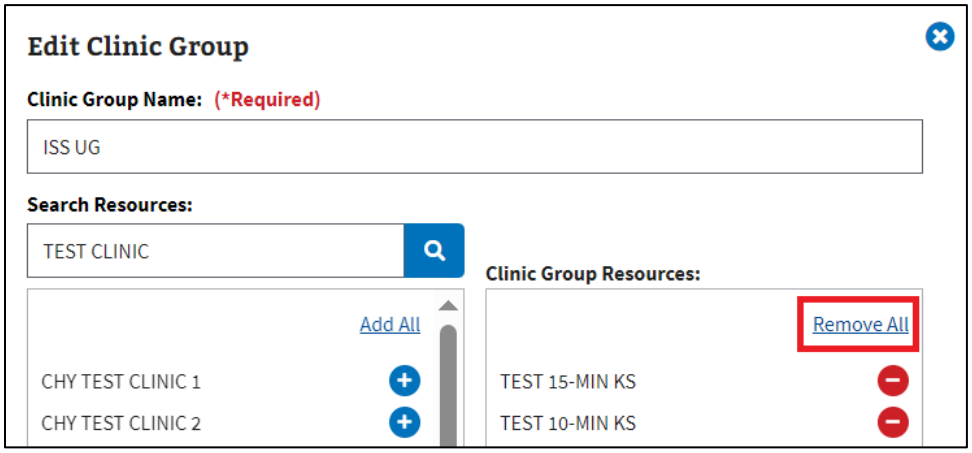


Figure 281: Button to Remove All Resources when Editing a Clinic Group

8. After making the necessary edits, the user will need to select the "Save Changes" button, seen in **Figure 282**, to save all changes.

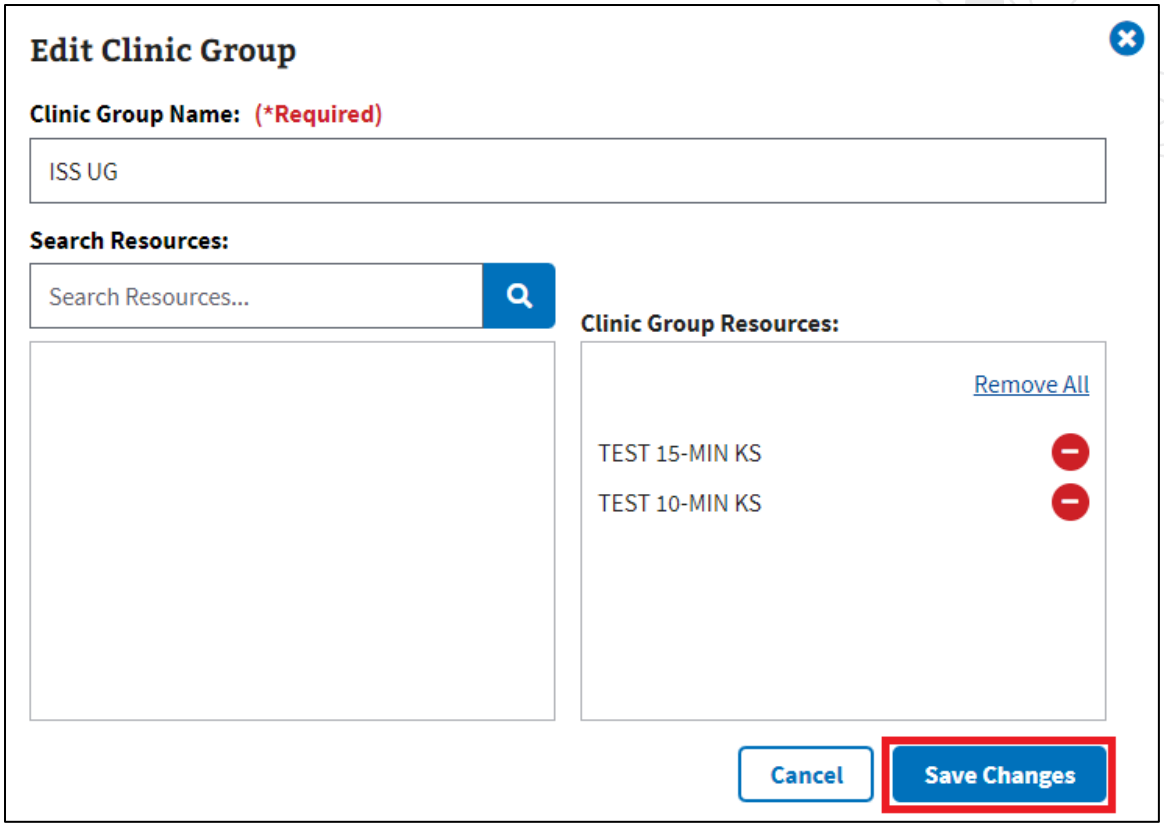


Figure 282: Save Changes Button for Editing Clinic Groups

9. The user will be brought to the Successfully Updated Clinic Group window shown in **Figure 283** below. Select close to finish.

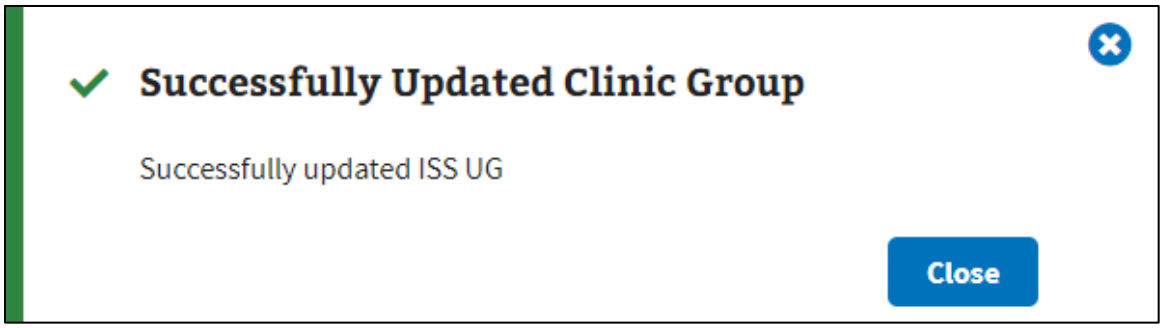


Figure 283: Successfully Updated Clinic Group Window

7.2.2 Remove Clinic Group

1. To search for a Clinic Group, the user will need to select the “Clinic Groups” tab shown in **Figure 284**.

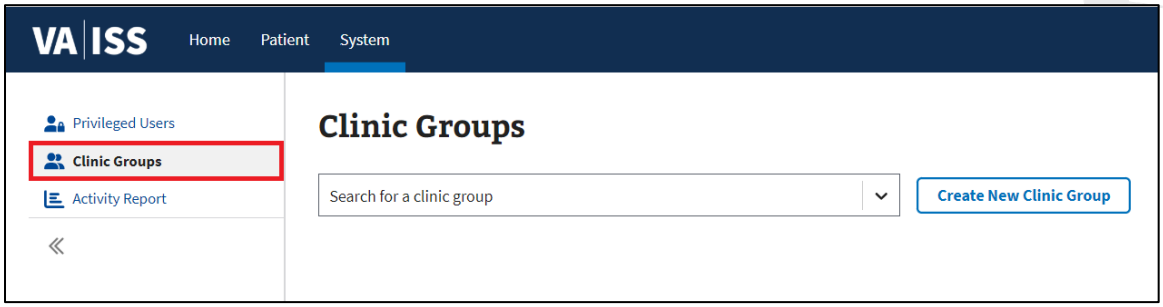


Figure 284: Selecting Clinic Groups Tab to Remove

2. The user will then need to enter the name of a clinic group into the search bar. This will cause any applicable results to appear in a dropdown, as seen in **Figure 285** below, where the user can select the intended clinic group.

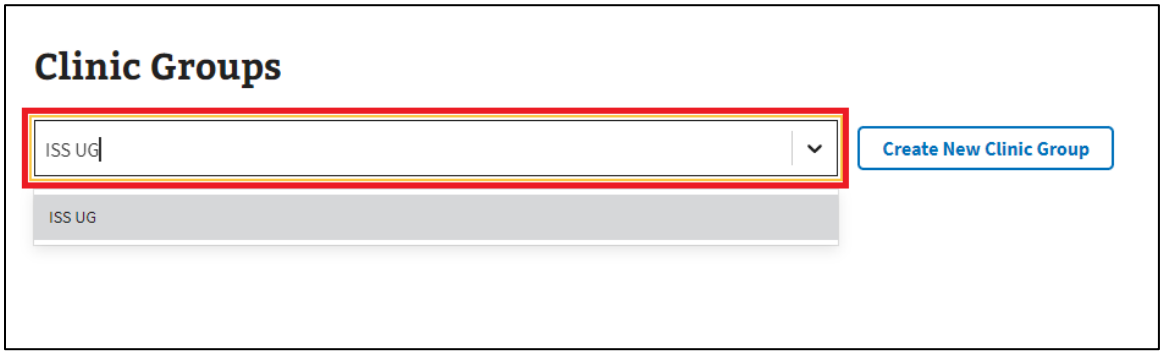


Figure 285: Search Bar for Finding a Clinic Group to Remove

3. The user will be brought to the (Clinic Group Name) page. From here, the user can select the “Remove Clinic Group” button, seen in **Figure 286**. This will cause the Remove Clinic Group? notification to appear.

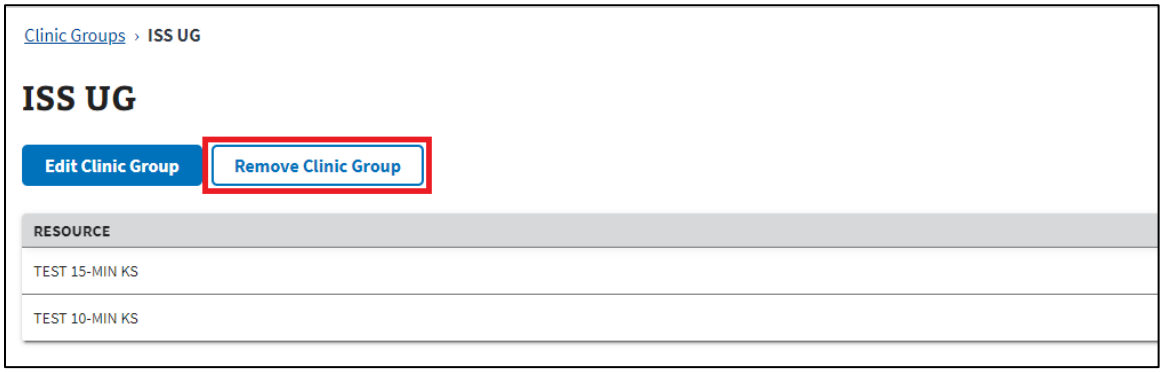


Figure 286: Remove Clinic Group Button

4. The user can select the “Remove Clinic Group” button, seen in **Figure 287**, to successfully remove the clinic group.

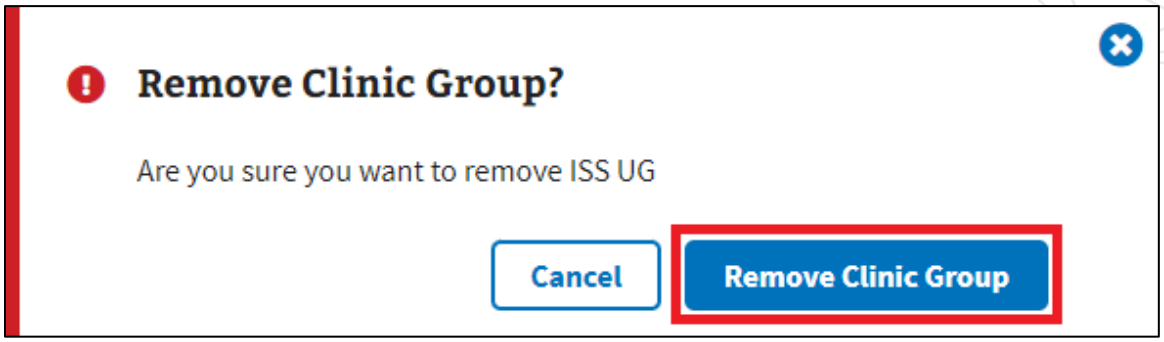


Figure 287: Remove Clinic Group Button from Confirmation Window

- ❖ *Note: The user can also select the “Cancel” button or the “x” button seen in the upper right hand corner of the notification in **Figure 287** to exit the process and go back to the (Clinic Group Name) page.*

5. The user will be brought to the Successfully Deleted Clinic Group window shown in **Figure 288** below. Select close to finish.

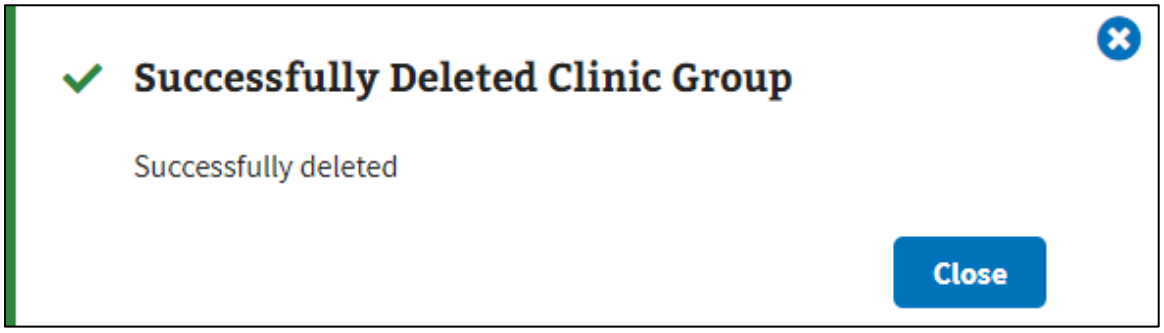


Figure 288: Successfully Deleted Clinic Group Window

7.2.3 Creating New Clinic Groups

1. To search for a Clinic Group, the user will need to select the “Clinic Groups” tab shown in **Figure 289**.

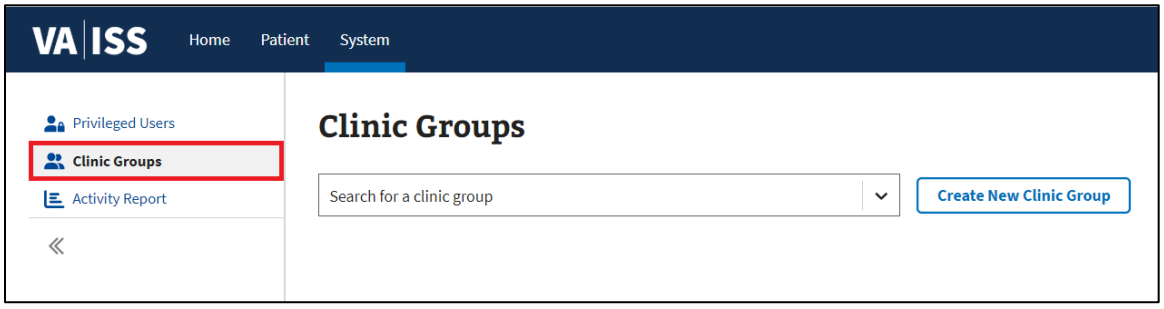


Figure 289: Selecting Clinic Groups Tab to Create New Clinic Group

2. The user can then select the “Create New Clinic Group” button shown in **Figure 290** to be brought to the Create New Clinic Group window.

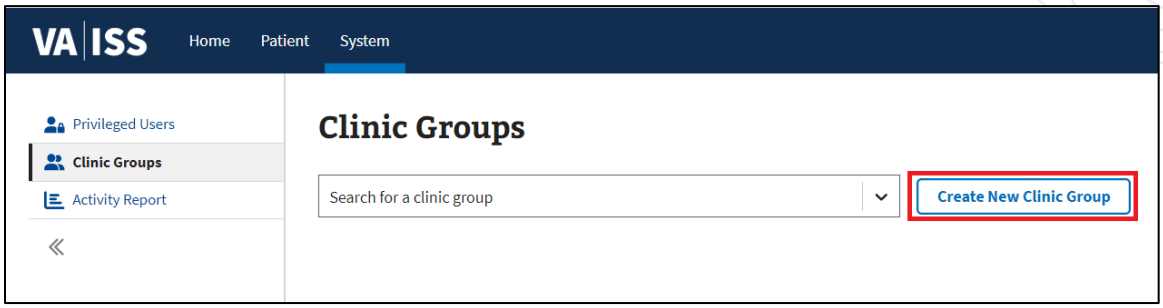


Figure 290: Create New Clinic Group Button

3. To add a name for the clinic group, the user will need to enter a preferred name into the Clinic Group Name section seen in **Figure 291**.

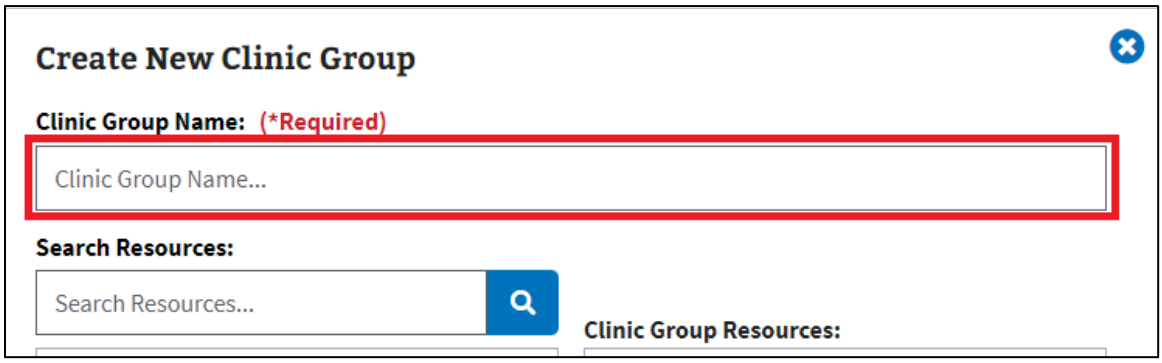


Figure 291: Field for Clinic Group Name when Creating New Clinic Group

4. To add resources to the clinic group, the user will need to enter valid search criteria into the search bar seen in **Figure 292**. This will cause any applicable results to appear in the box below.

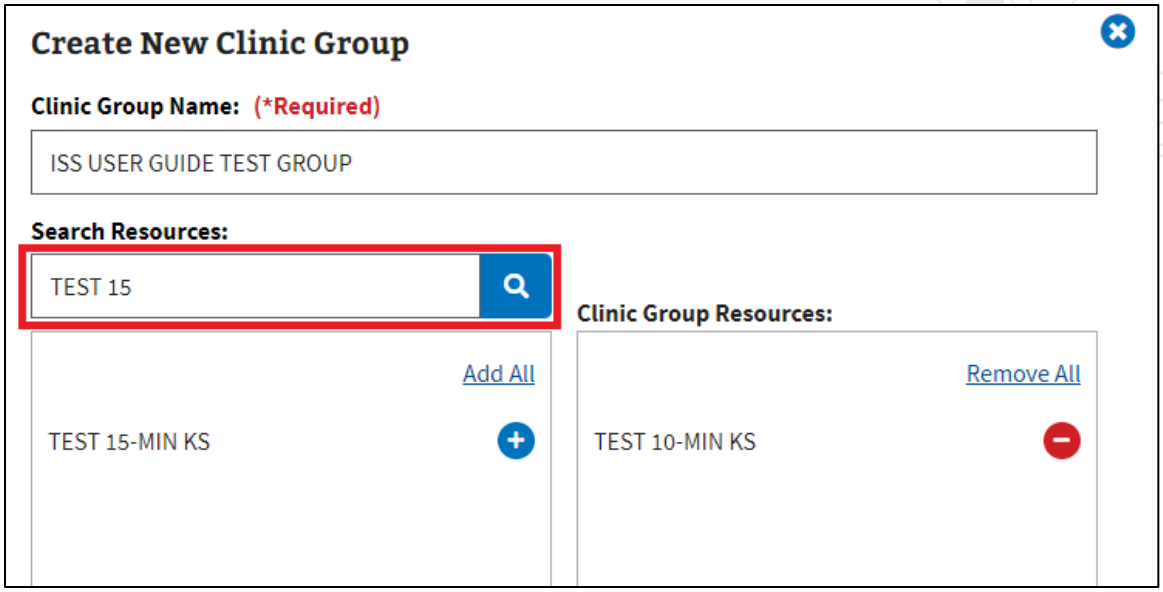


Figure 292: Search Bar to Find Resources when Creating a New Clinic Group

5. The user will then need to either select the add button next to any individual resource option or select the "Add All" button shown in **Figure 293** to add all the options listed.

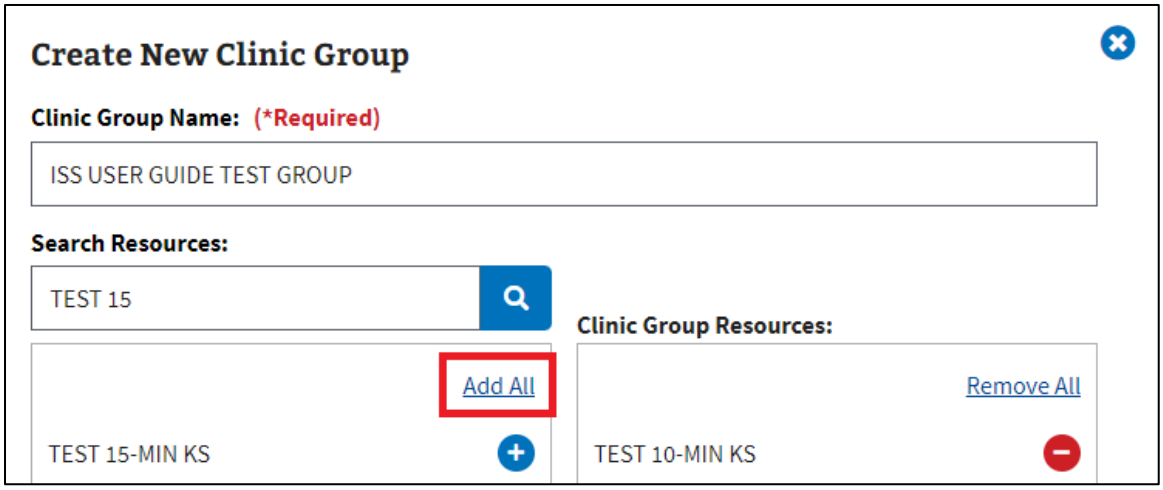


Figure 293: Button to Add All Resources when Creating a Clinic Group

- *Note: If the user needs to remove any previously selected resources, the user can select either the remove button next to an individual resource in the Clinic Group Resources section or select the "Remove All" button shown in **Figure 294** to remove all the options listed.*

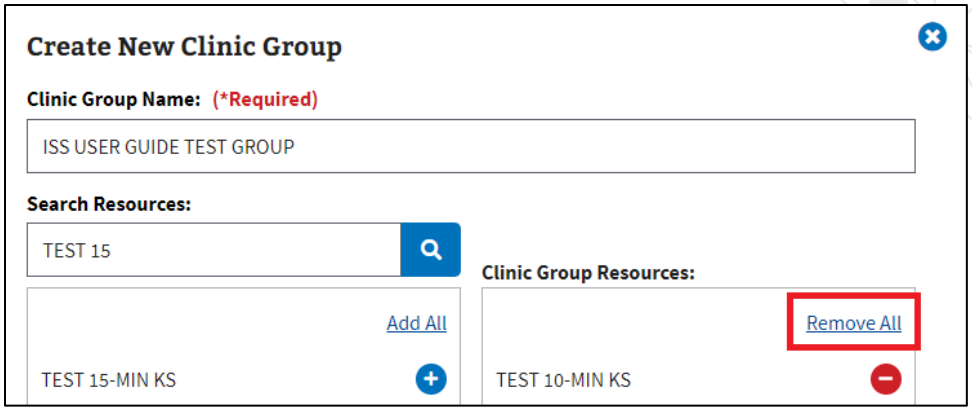


Figure 294: Button to Remove All Resources when Creating a Clinic Group

6. Once all necessary clinic group resources have been added, the user will need to select the "Create Clinic Group" button, seen in **Figure 295**, to create the new clinic group.

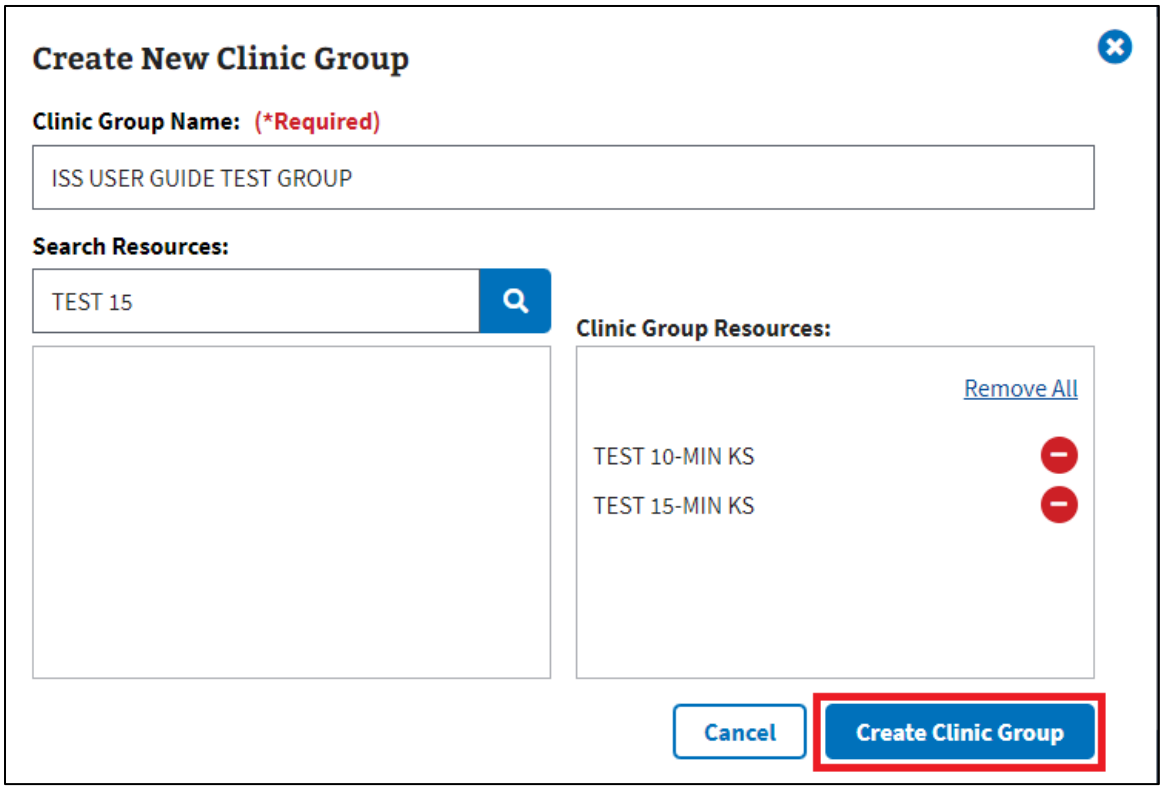


Figure 295: Create Clinic Group Button

7. The user will be brought to the Successfully Created Clinic Group window shown in **Figure 296** below. Select close to finish.

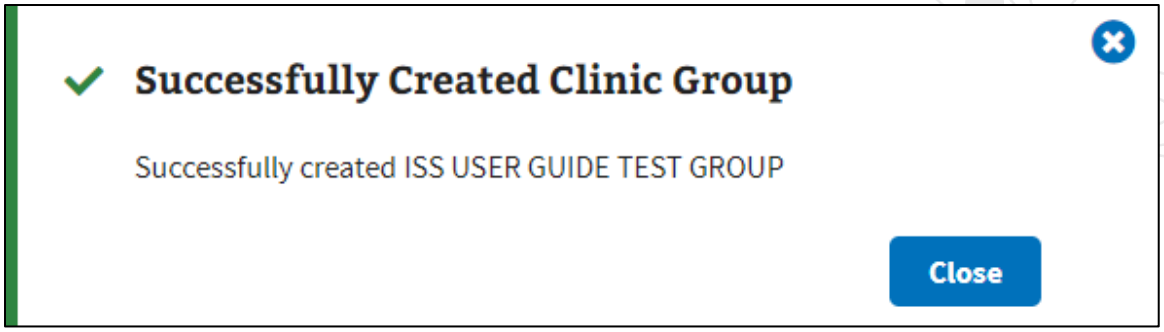


Figure 296: Successfully Created Clinic Group Window

7.3 Activity Report

1. To access the Activity Report, the user will need to select the "Activity Report" tab seen in **Figure 297**.

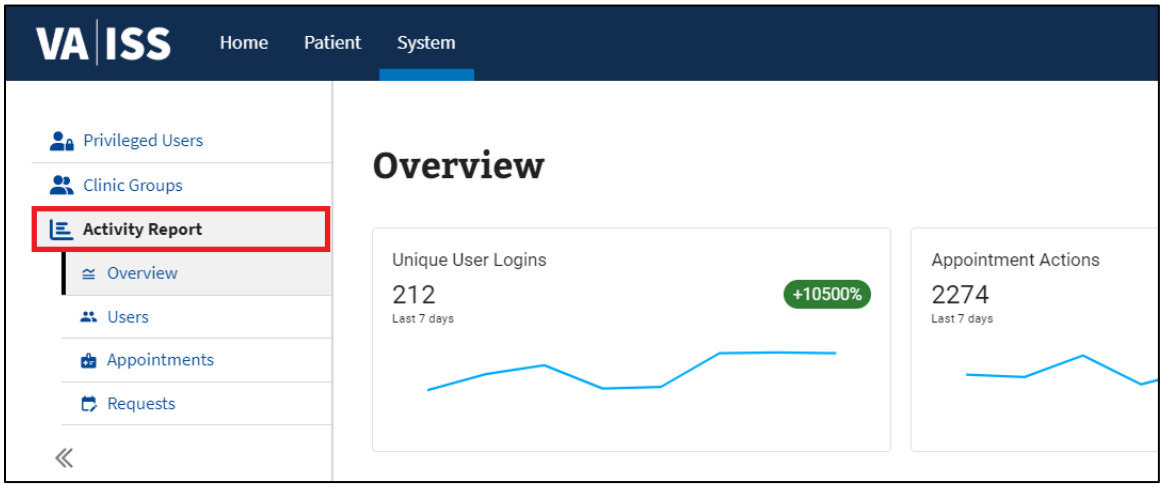


Figure 297: Activity Report Tab

2. Upon selecting the "Activity Report" tab, the user will be taken to the Overview page by default. The user can then select any of the sub-tabs seen in **Figure 298** to access them.

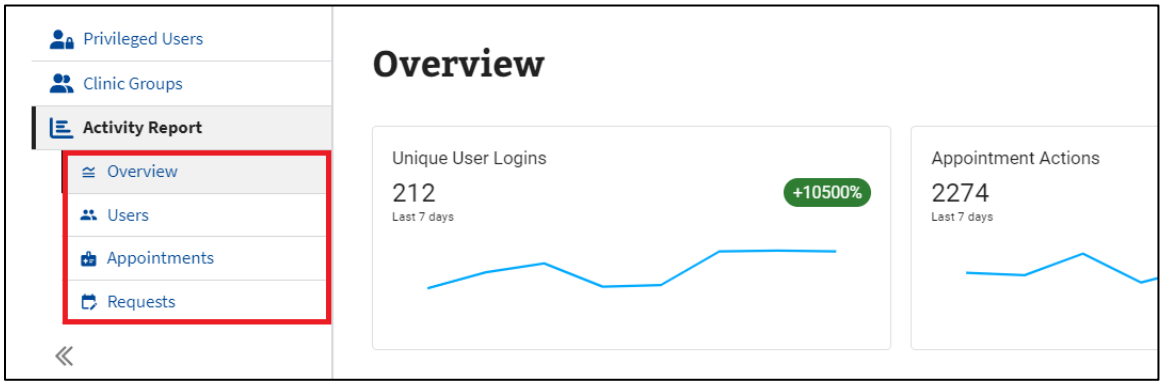


Figure 298: Sub-Tabs for the Activity Report

3. Within the sub-tabs, the user can navigate the graphs and tables for information relating to each section's title (see figure x for example).



Figure 299: Example of Data within Activity Report Sub-Tabs

- *Note: See sections **2.3.2 Sort by Ascending and Descending**, **2.3.3 Toggle Density**, **2.3.4 Show, Hide, and Search Filters**, and **2.3.5 Filtering Rows** for information on filtering tables.*

4. The user can also filter the results shown within each sub-tab by selecting the preferred date range from the dropdown calendar found in the upper righthand corner of each page (see **Figure 300**).

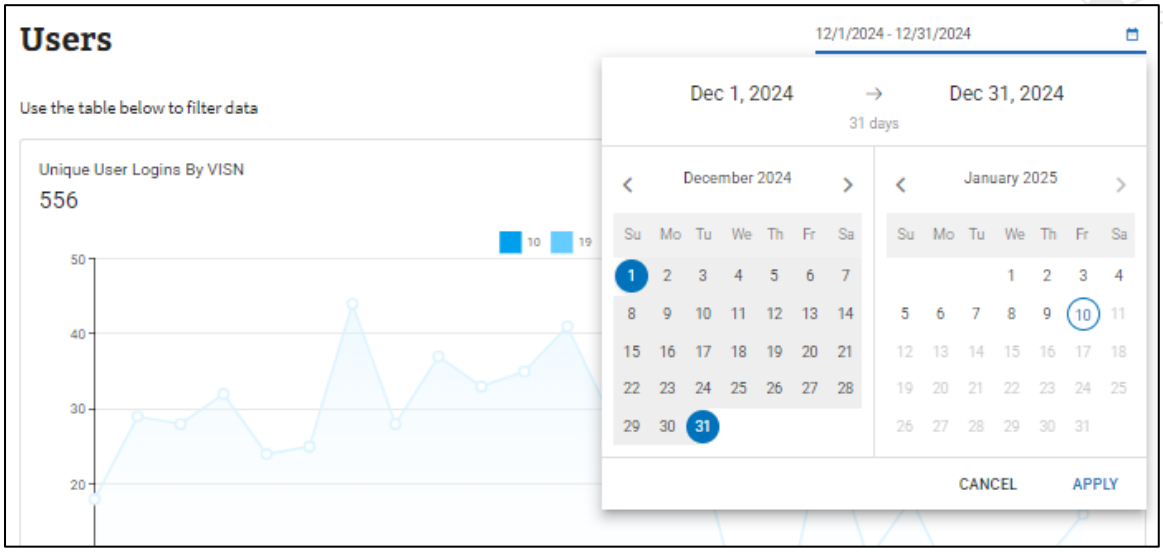


Figure 300: Date Range Calendar Dropdown for Activity Report

- ❖ *Note: While all four sections allow filtering of the date range, only the Overview tab allows the user to filter by VISN.*

5. On certain graphs within the "Activity Reports" tab, the user can hover the cursor over data points, as seen in **Figure 301**, to receive more context about the information being shown.

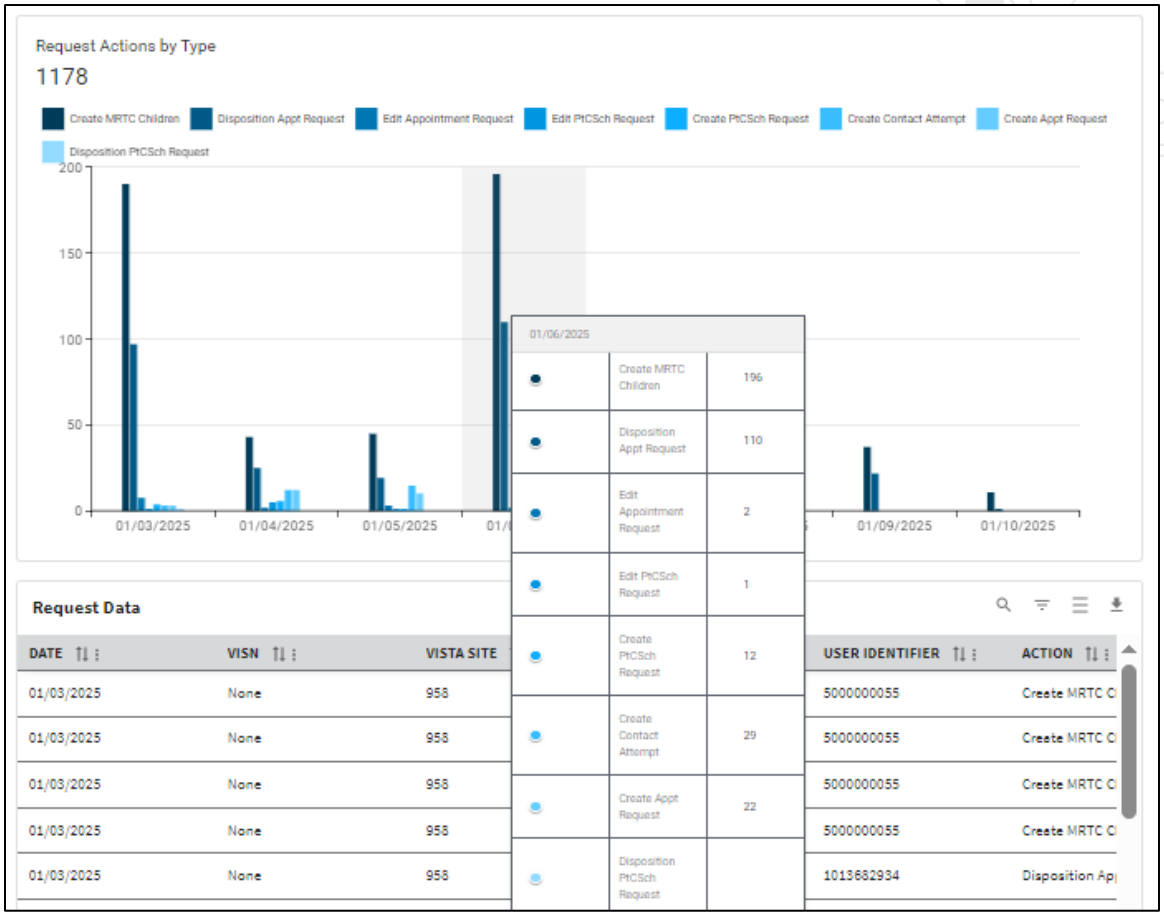


Figure 301: Data Point Information on Activity Report Graphs

6. The user can also export data of any table within the tabs by selecting the "Export" button seen in **Figure 302**. The user will then be prompted to open or save an Excel worksheet, where the ability to print the information is accessible.

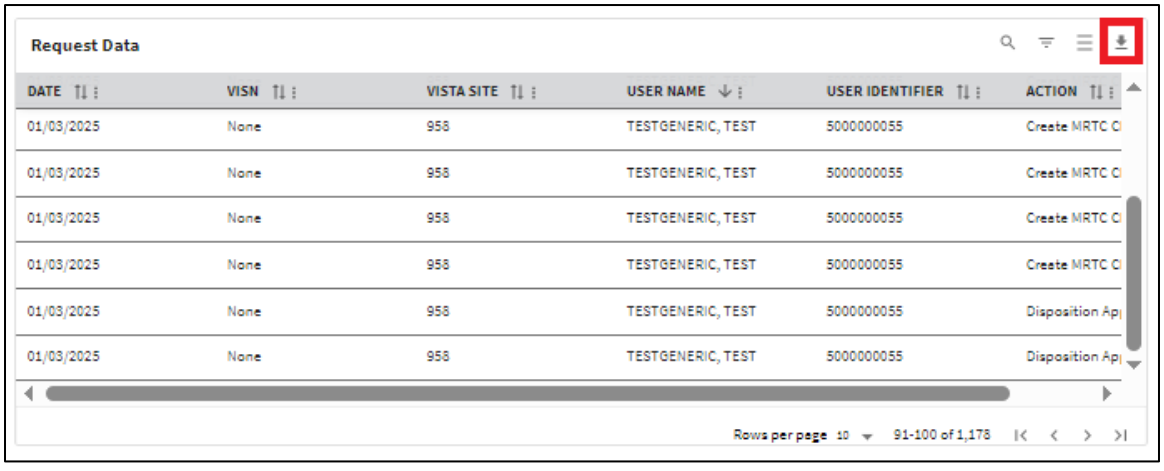


Figure 302: Export Button for Activity Report

8. References

8.1 Cancellation Reasons

Table 2: List of Cancellation Reasons

Name	Type	Ability to Reopen
Appointment No Longer Required	Clinic	No
Block and Move	Clinic	Yes
Clinic Cancelled	Clinic	Yes
Clinic Staffing	Clinic	Yes
Death in Family	Patient	Yes
Do Not Reschedule	Patient	No
Inpatient Status	Clinic	Yes
Other	Clinic and Patient	Yes
Pandemic	Clinic and Patient	Yes
Patient Death	Clinic	No
Patient Not Eligible	Clinic	No
Reschedule – Call Back	Patient	Yes
Reschedule – Vet Will Call	Patient	No
Scheduling Conflict/Error	Clinic	Yes
Transfer Opt Care to Other VA	Clinic and Patient	No
Travel Difficulty	Patient	Yes
Unable to Keep Appointment	Patient	Yes
Walk-In Entered in Error	Clinic	No

Walk-In No Longer Necessary	Patient	No
Weather	Clinic and Patient	Yes