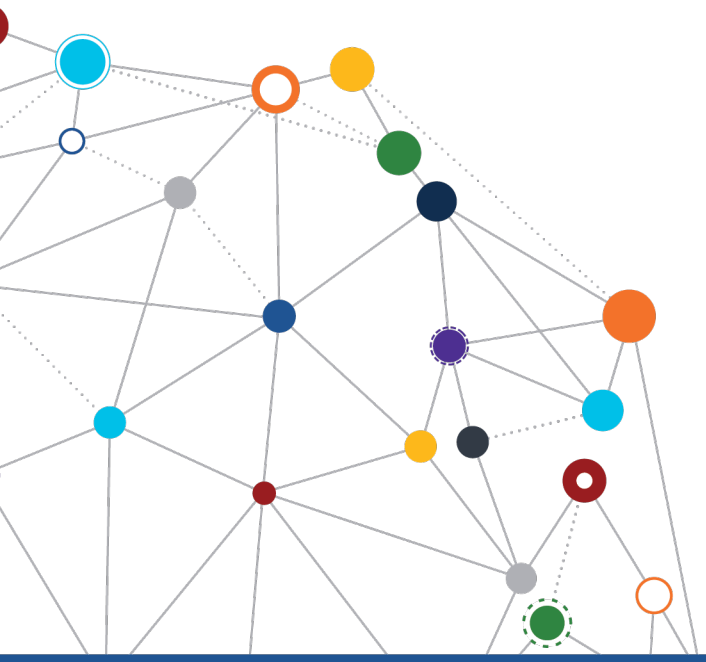
OFFICE OF
INFORMATION
AND TECHNOLOGY

Integrated Scheduling Solution User Guide

June 2025



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

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Revision History

Date	Version	Description	Author
6/4/2025	1.21.2	Updated section 6 and added subsection on Recurring Slot Availability	Booz Allen Hamilton
4/15/2025	1.19.1	Added information on Refresh button to section 2.3.8 and Disposition confirmation to section 4.2.4	Booz Allen Hamilton
3/28/2025	1.18.10	Updated UI for section 4.2, added information on new Action menu on Viewing Requests page	Liberty ITS
3/17/2025	1.17.2	Added information on Active Prescriptions to the Demographics section, updated ISS link	Liberty ITS
2/19/2025	1.16.1	Added sections on Duplicate Appointment Requests for Clinic/Service, added information on duplicate appointment requests to APPT and PtCSch sections, updated UI changes in APPT and PtCSch sections	Liberty ITS
1/30/2025	1.15.4	Updated information on Comment Tracking, Cancellation Reasons, and Video Visits, removed information on Column filters, added information on orphaned requests to MRTC section	Liberty ITS
1/06/2025	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
11/05/2024	1.12.0	Updated UI changes in the Check In section	Liberty ITS

Date	Version	Description	Author
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.

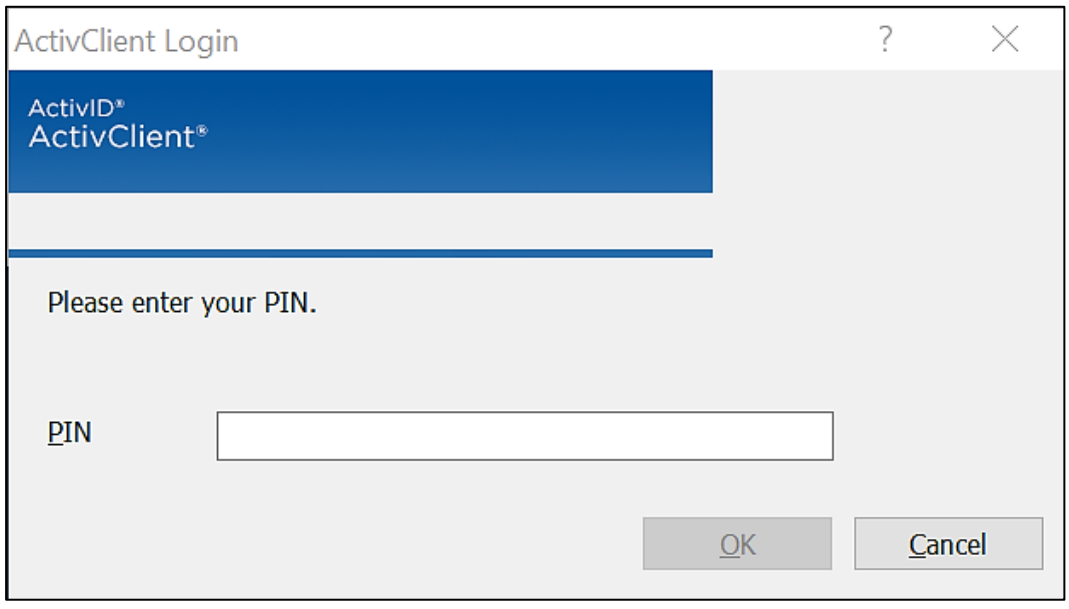


Figure 2: ActivClient Login Pop-Up Window

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**.

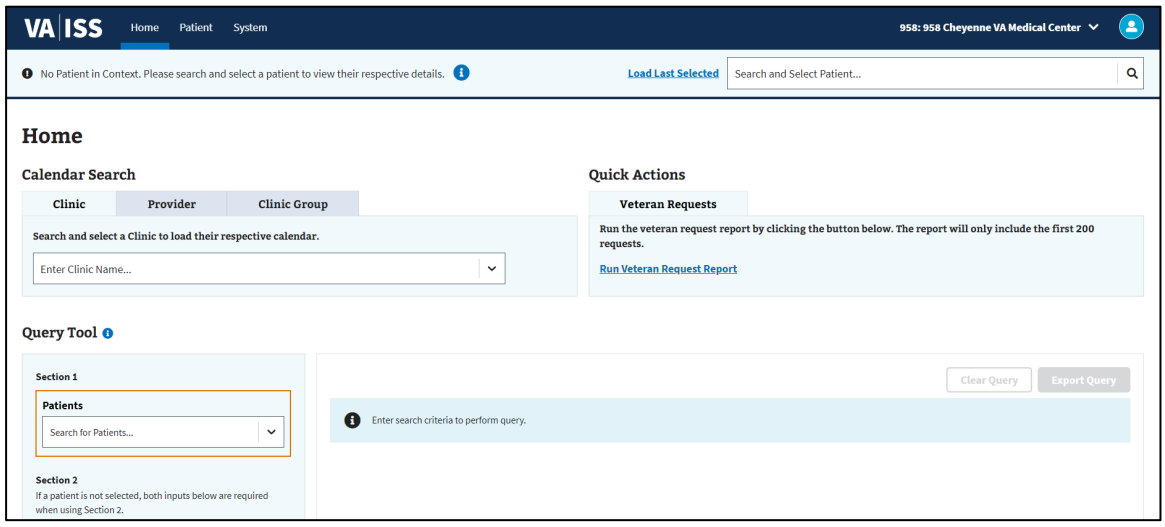


Figure 3: ISS Home Page

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**.

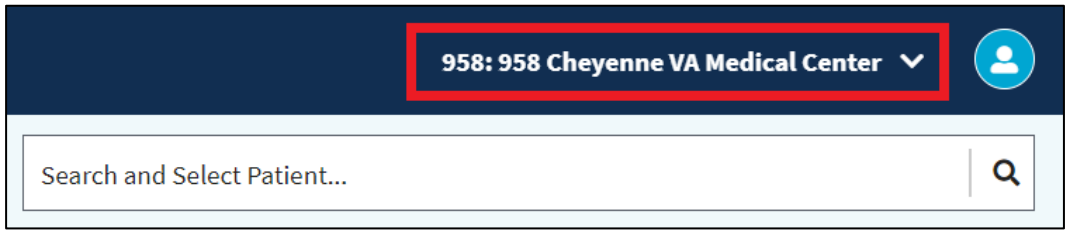


Figure 4: Site Locations

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.

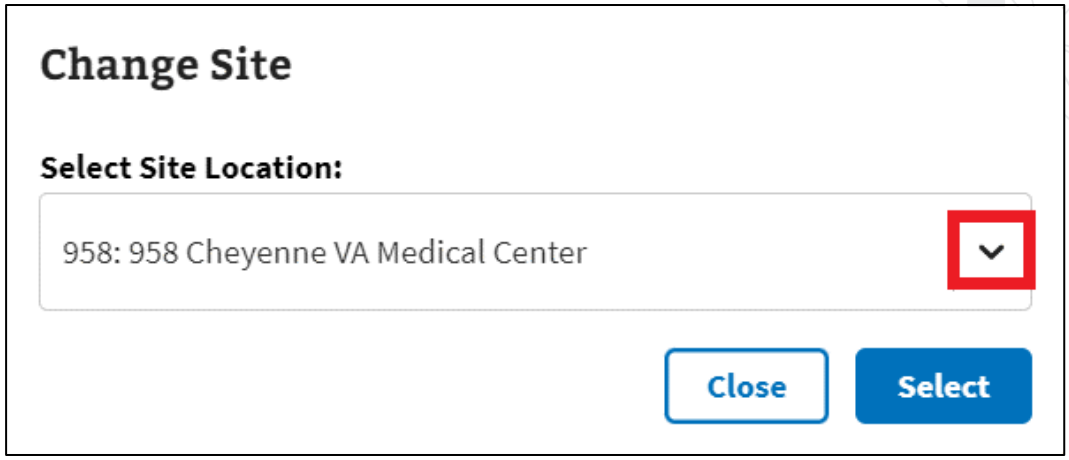


Figure 5: Dropdown Arrow for Changing Site Locations

- *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.

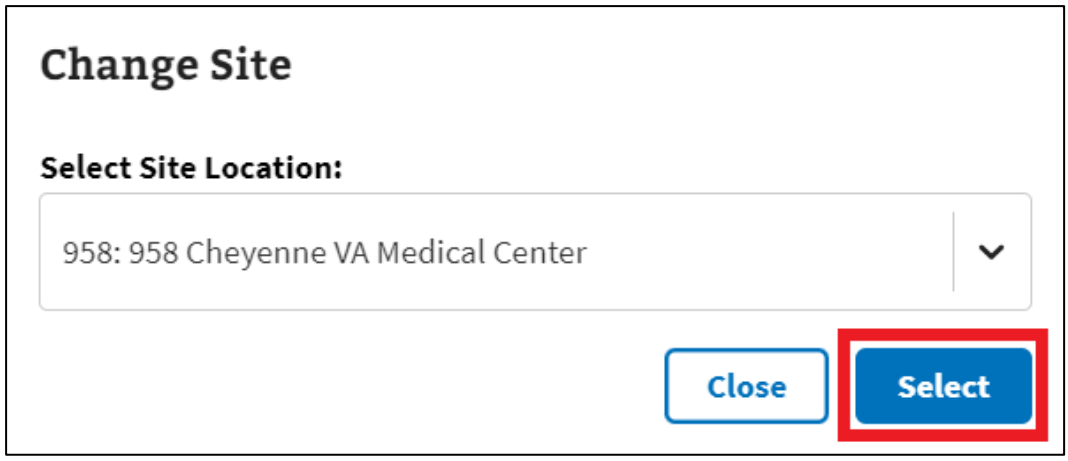


Figure 6: Select Button on Changing Site Locations Window

- *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.*

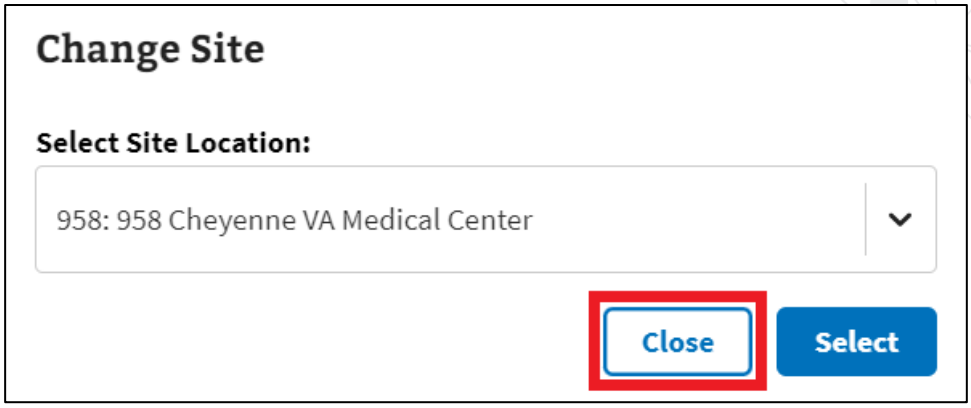


Figure 7: Close Button on Changing Site Locations Window

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**.

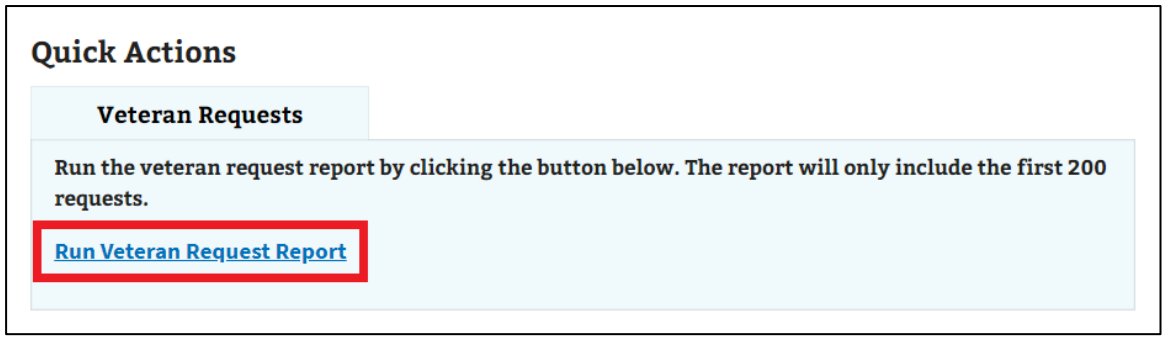


Figure 8: Run Veteran Request Report Button

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

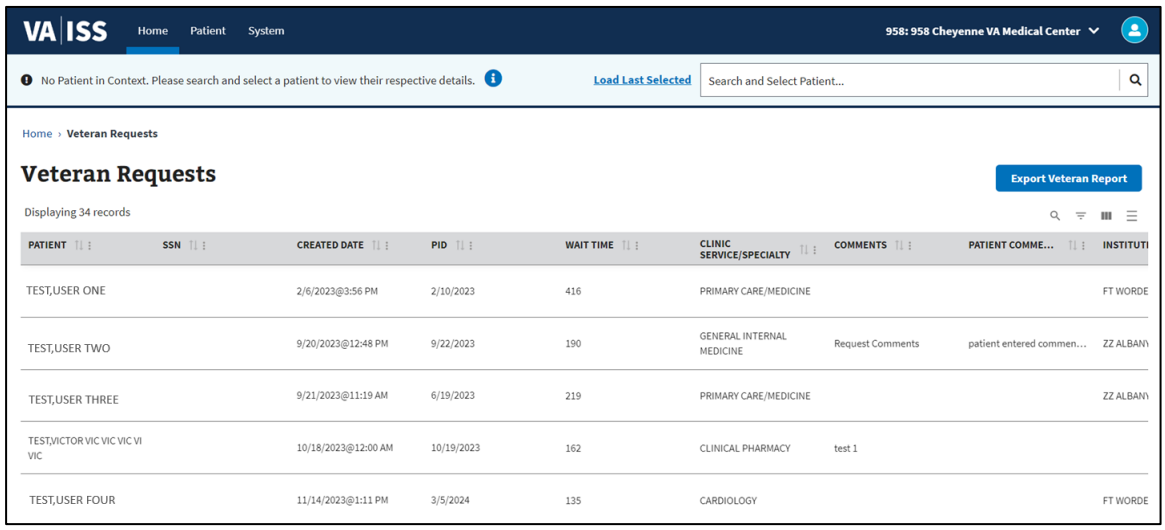


Figure 9: Veteran Requests Report Page

- *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.

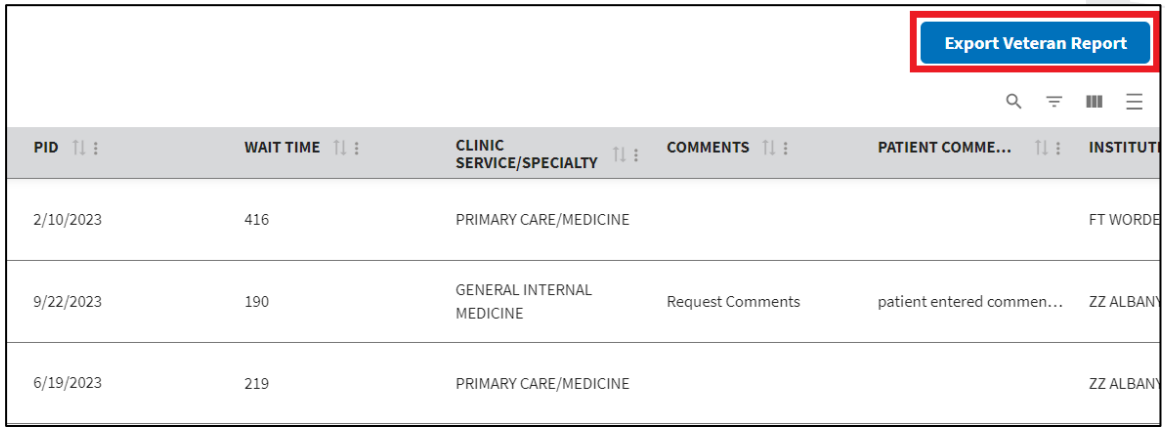


Figure 10: Export Veteran Report Button

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.

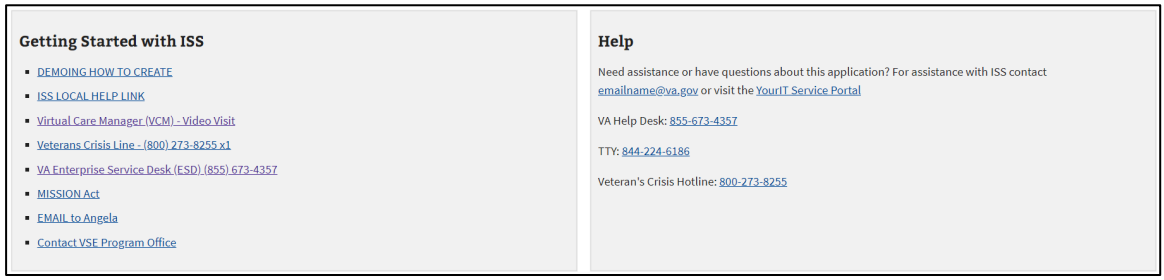


Figure 11: Example of Additional Links for ISS

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.

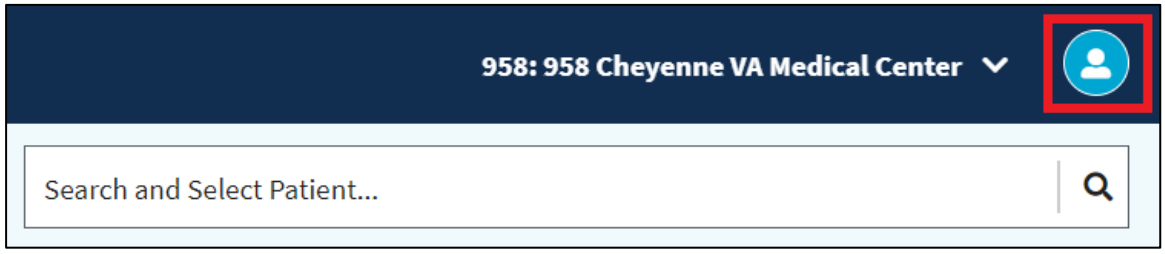


Figure 12: Selecting My Account Icon when Changing Preferences

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

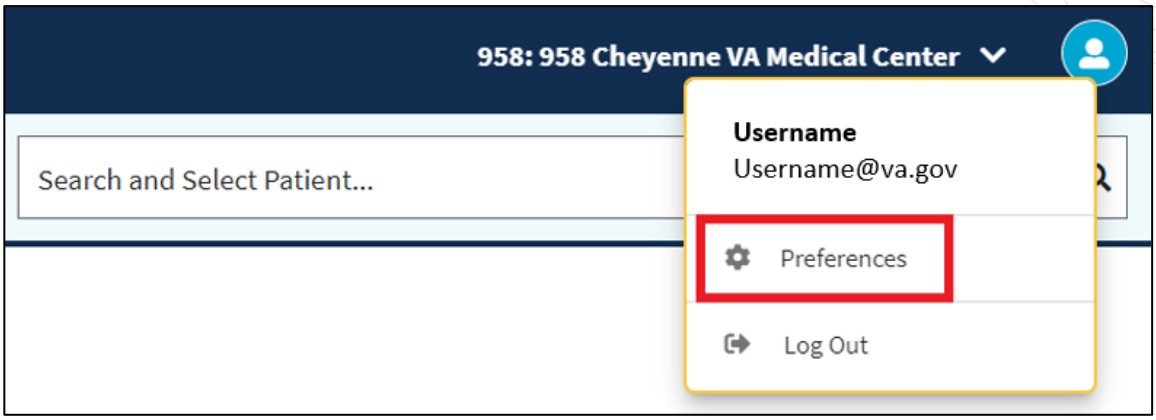


Figure 13: Preferences Button

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

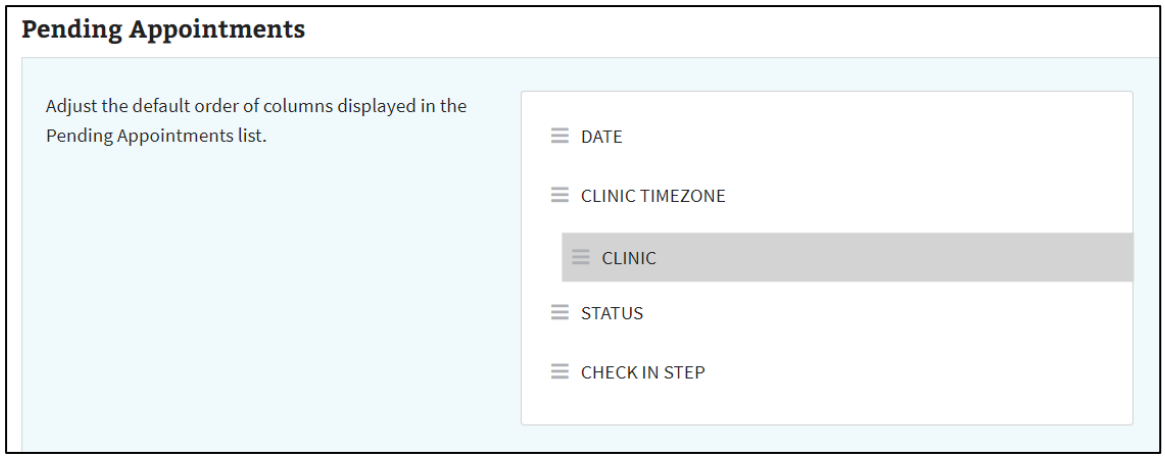


Figure 14: Adjusting Pending Appointments and Appointment Request Column Order from Preferences

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**.

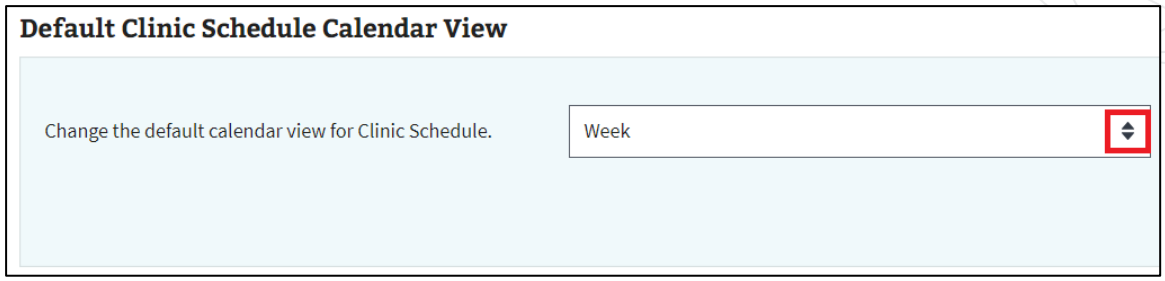


Figure 16: Dropdown Arrow for Changing Default Calendar View

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

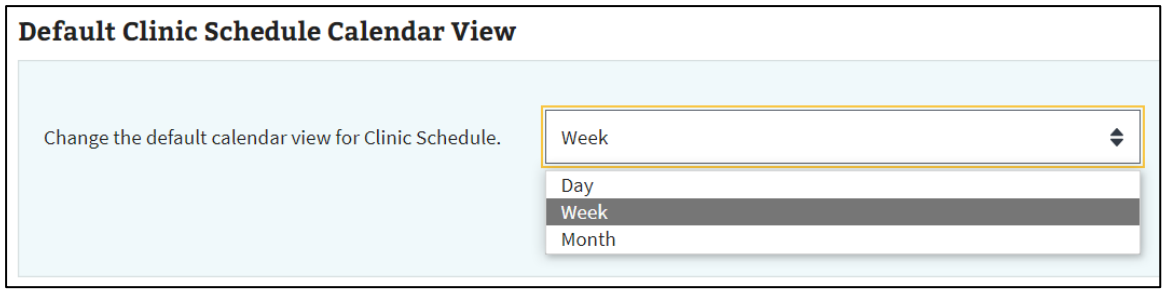


Figure 17: Dropdown View of Calendar View Selections

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

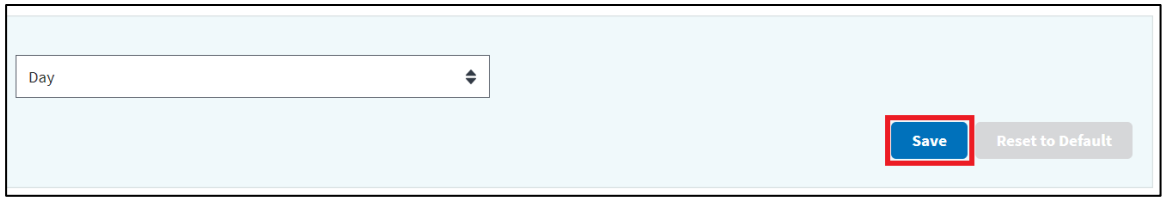


Figure 18: Save Button for Calendar View Preference

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

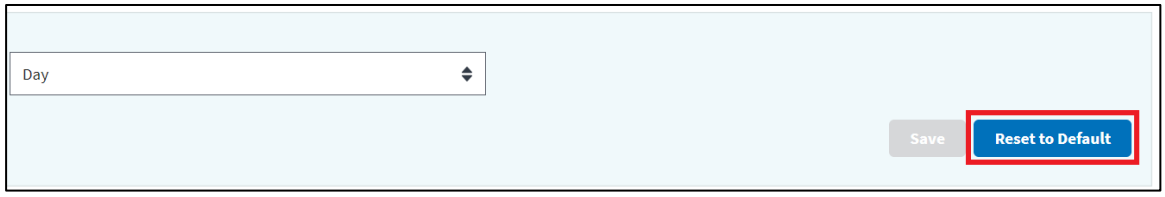


Figure 19: Reset to Default Button for Preferences

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.

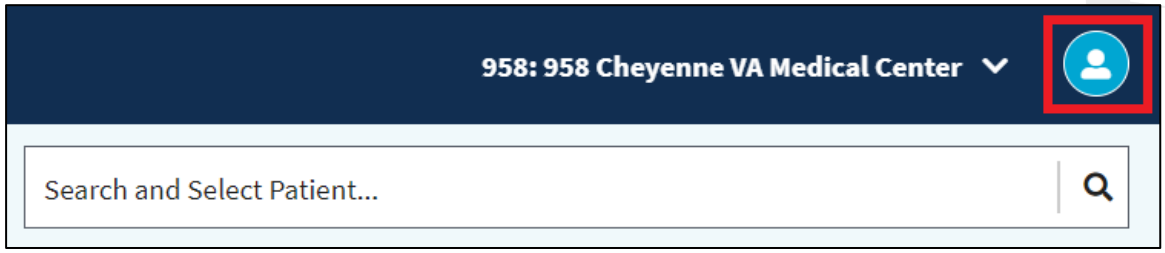


Figure 20: Selecting My Account Icon when Logging Out

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

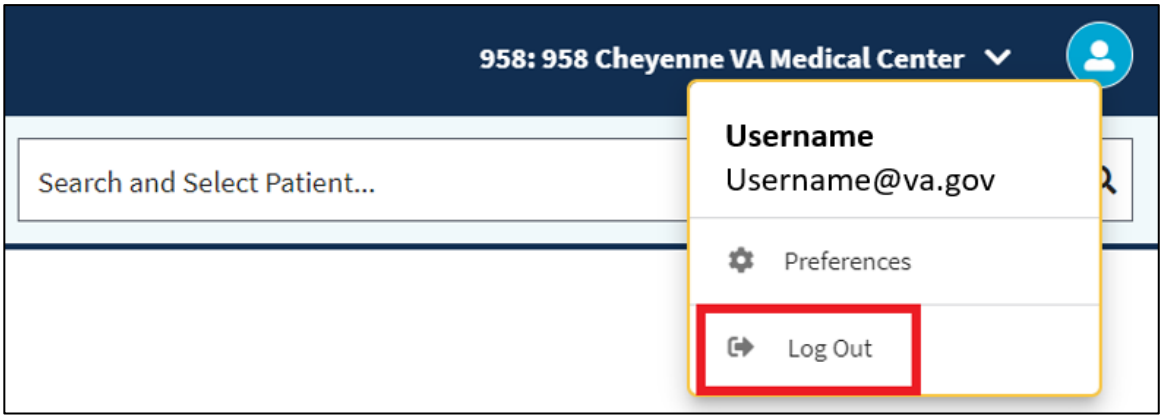


Figure 21: Log Out Button from My Account Dropdown

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.

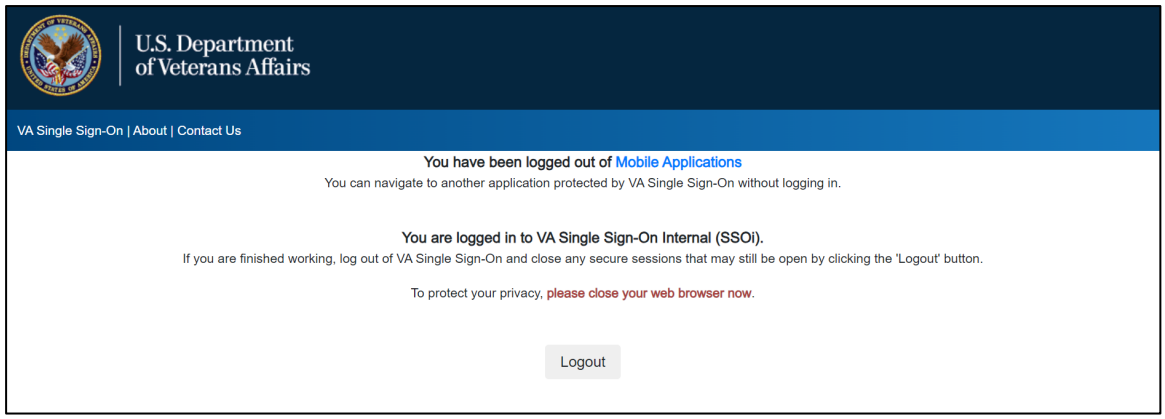


Figure 22: Logged Out of Mobile Applications Page

- *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).*

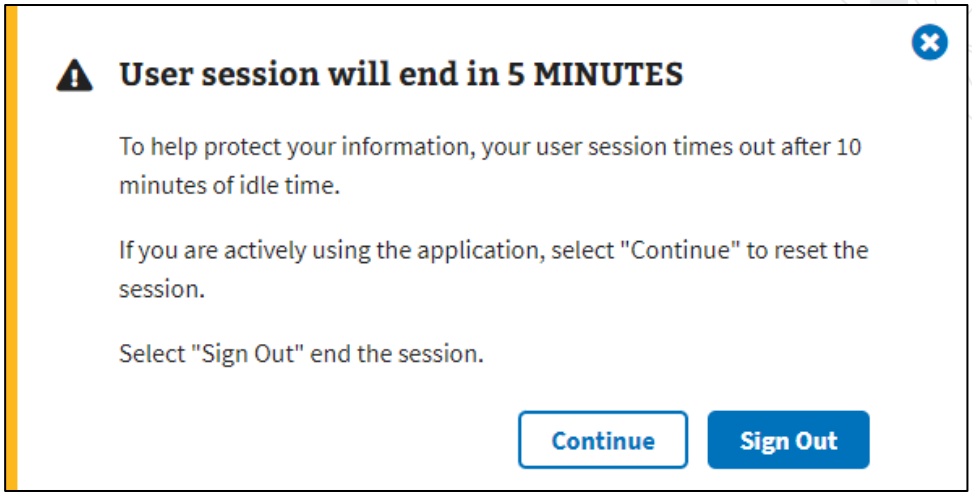


Figure 23: User Session is Ending Notification

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.

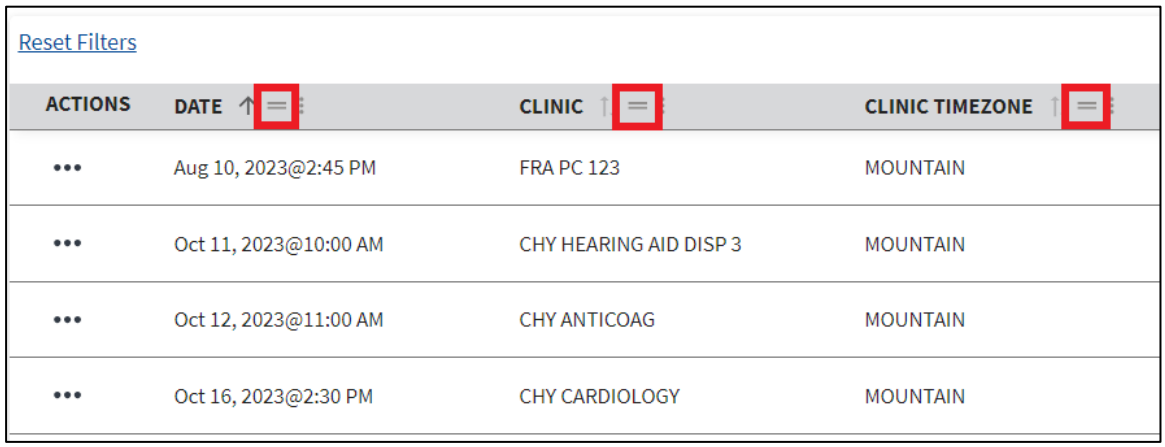


Figure 24: Move Button from Grid View

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**.

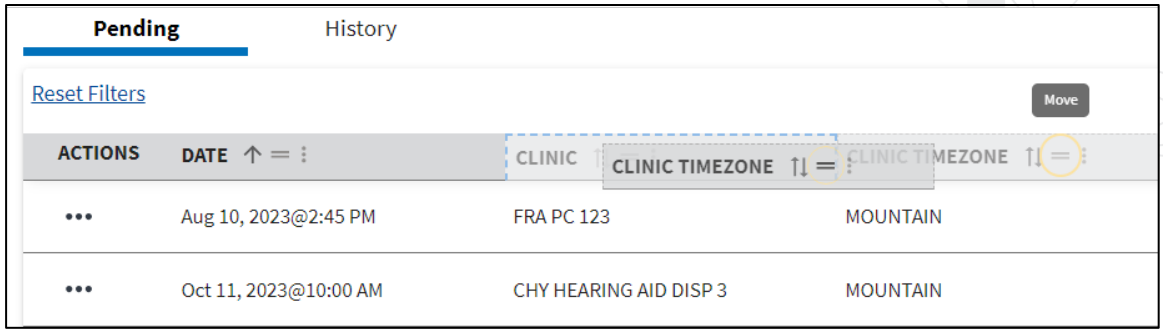


Figure 25: Example of Changing Column Order from Grid View

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 26**.

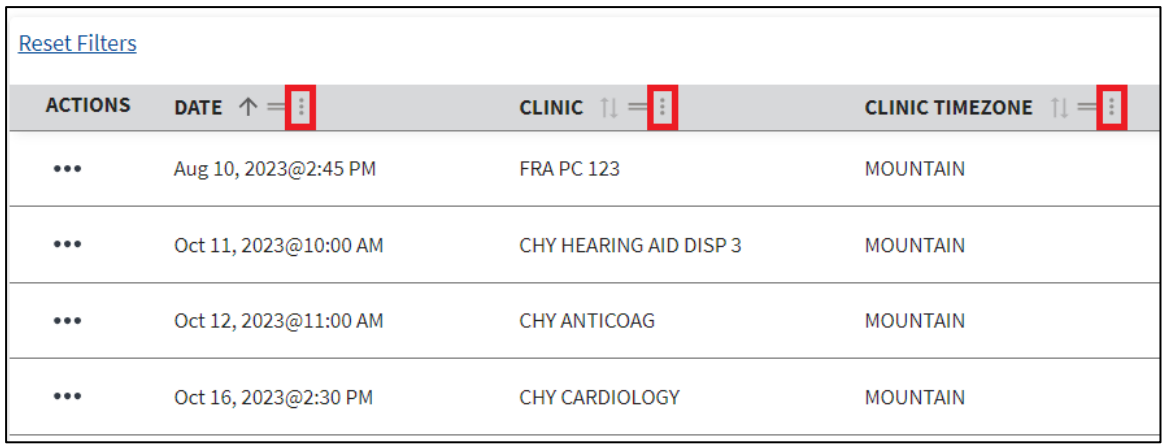


Figure 26: Selecting Column Actions Button to Sort Order

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 27**.

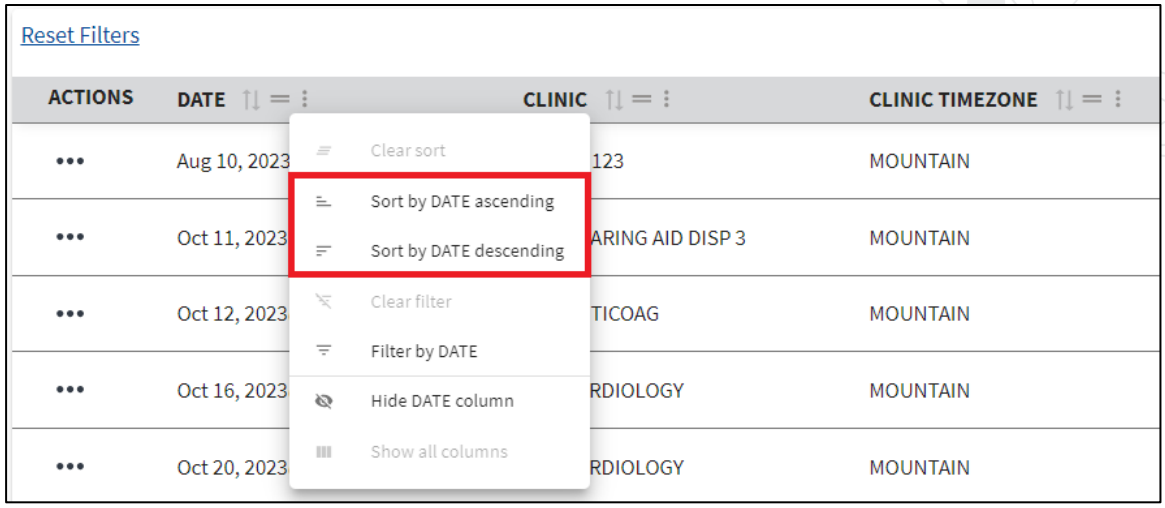


Figure 27: Sort Options for Table Information

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 28**.

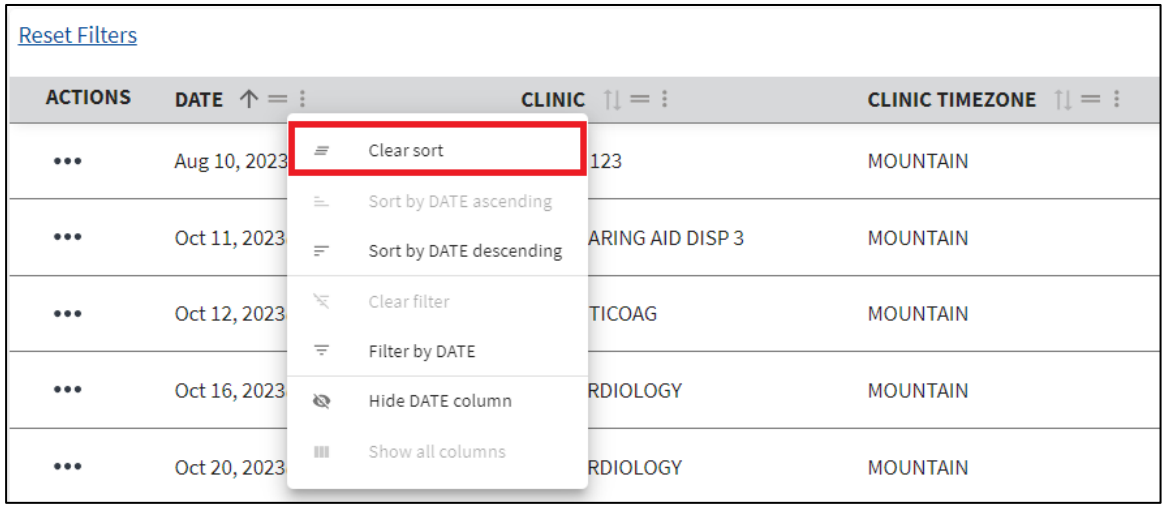


Figure 28: Clear Sort Button

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 29**.

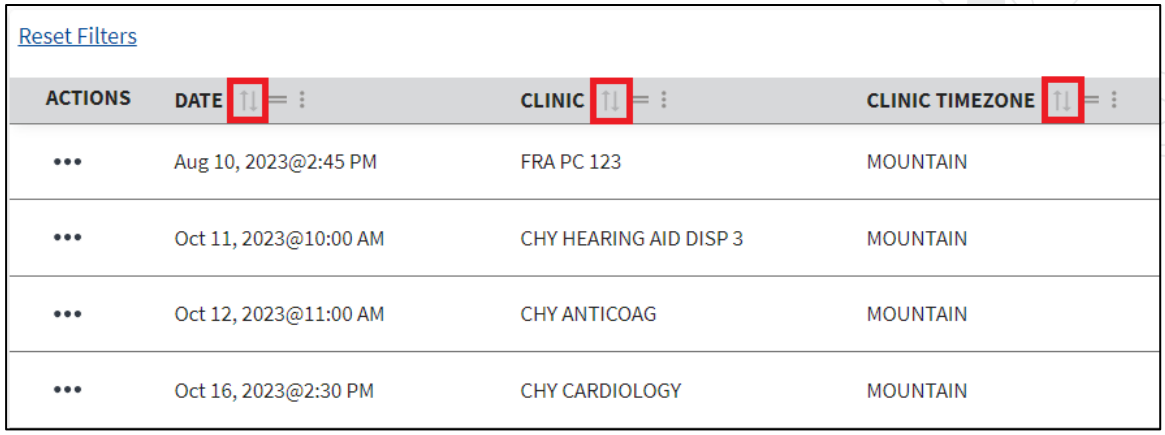


Figure 29: Sort Order Button

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 30**.

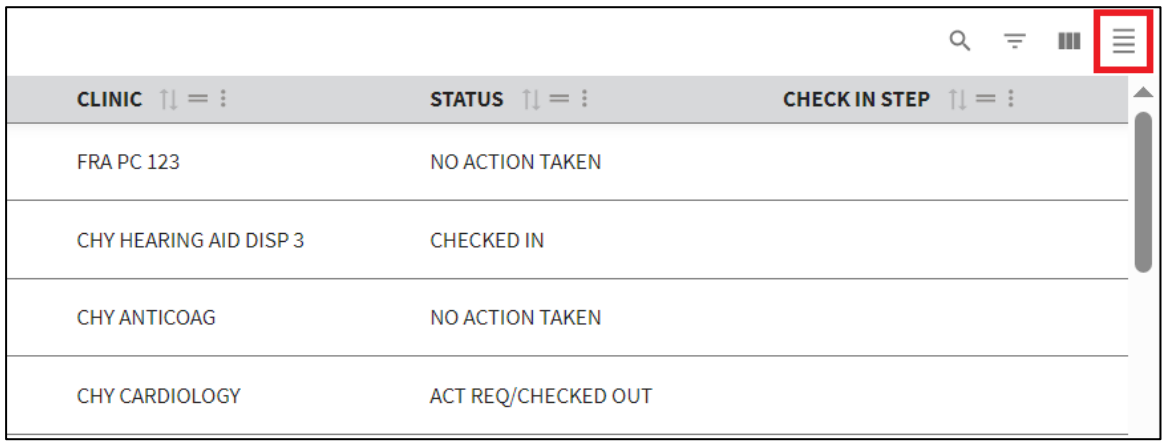


Figure 30: Toggle Density Button

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 31**. Selecting either will cause the search functions to appear under each column name.

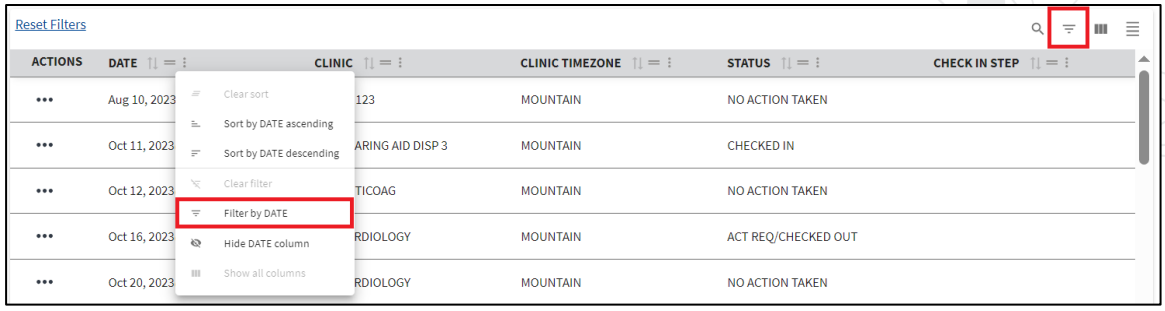


Figure 31: Show/Hide Filter Options Buttons

2. Once the search options appear as seen in **Figure 32**, 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.

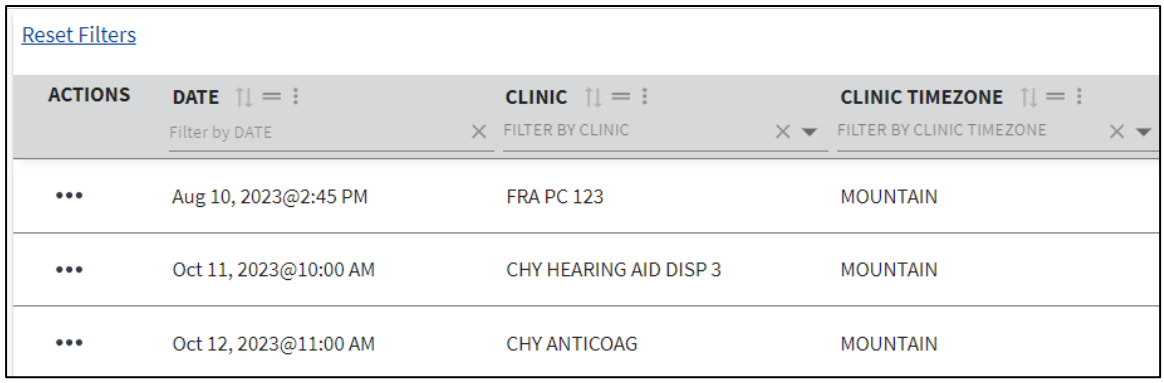


Figure 32: Example of Filter Search Menu on Grid View

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 33**.

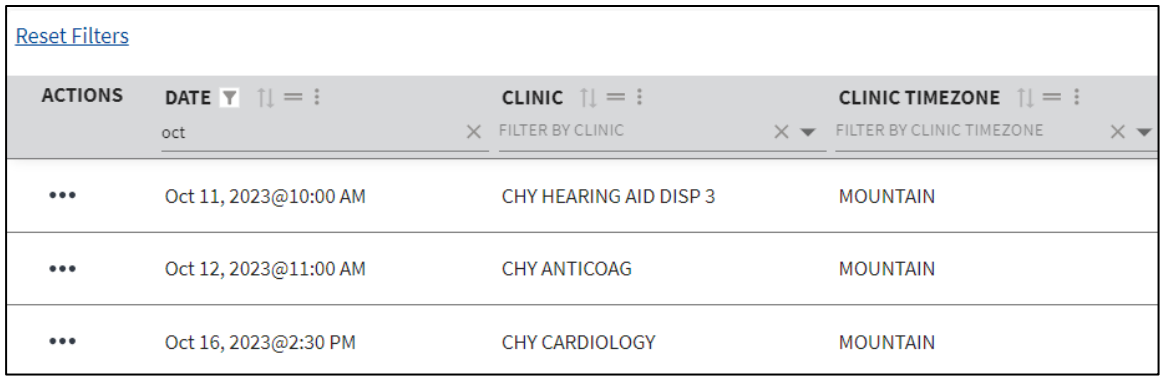


Figure 33: Example of Filtered Results in Grid View

4. To clear the search, the user will need to select the “X” next to the search bar seen in **Figure 34**. Selecting this will cause all results to appear within the table.

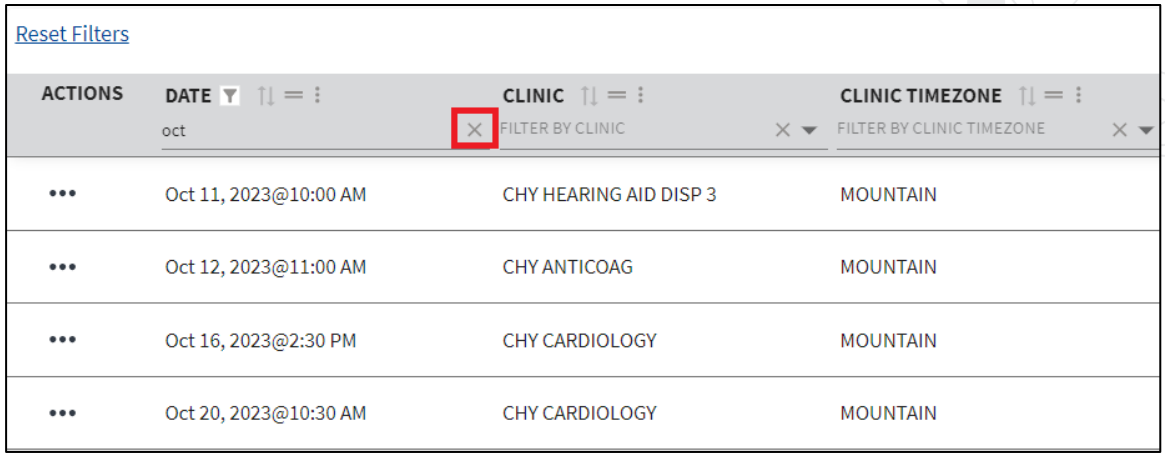


Figure 34: Clearing Filter Button

5. Once finished searching, the user can then select the "Show/Hide Search" button seen in **Figure 35** to hide the search bar.

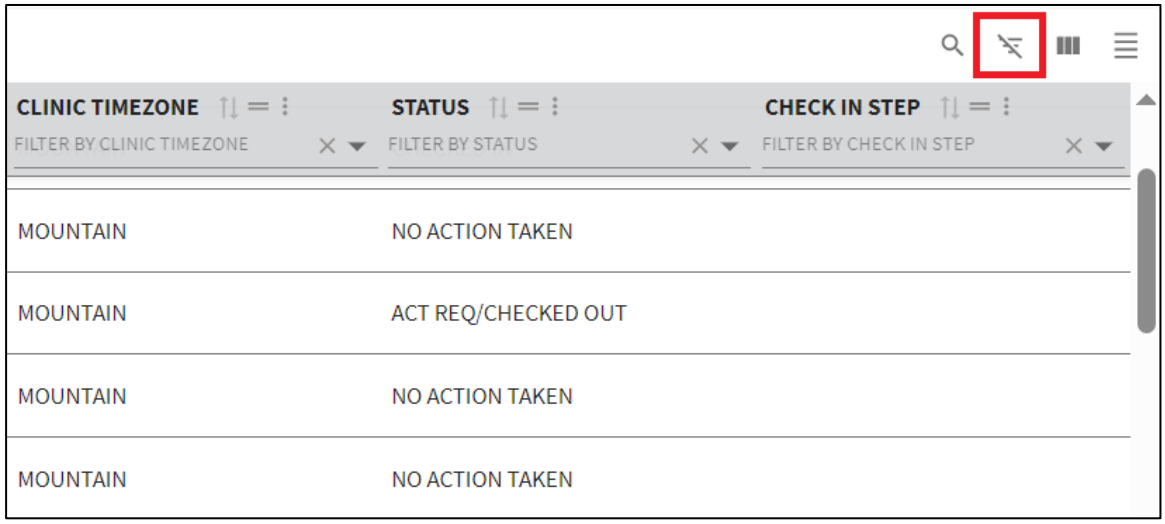


Figure 35: Selecting Show/Hide Filters Button to Hide Filter Menu

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 36**.

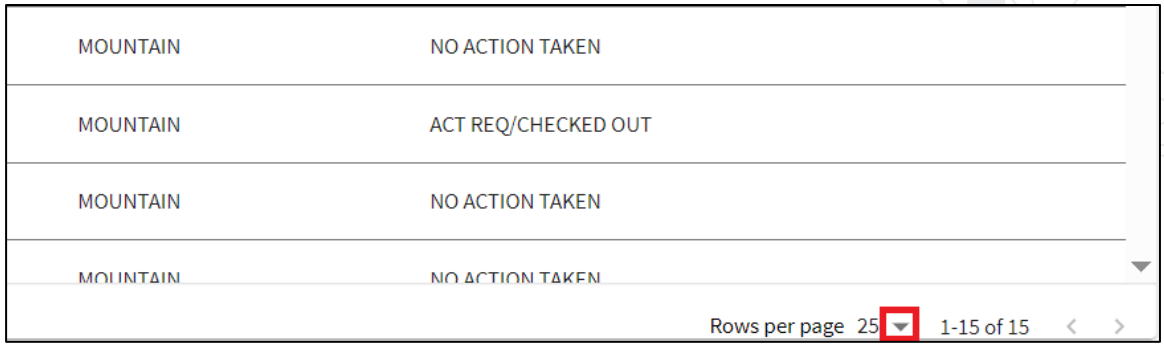


Figure 36: Arrow Button for Changing Row Number

2. Users can also navigate the table to more available timeslots by selecting the arrows, shown in **Figure 37** 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.

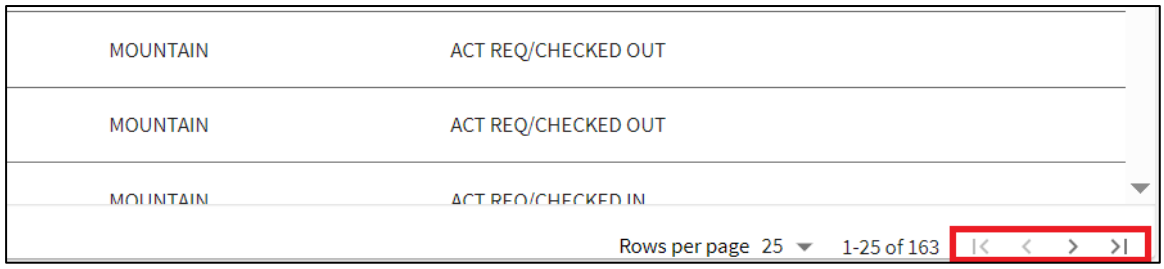


Figure 37: Buttons for Navigating Result Pages on Grid View

- ❖ *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 38**.

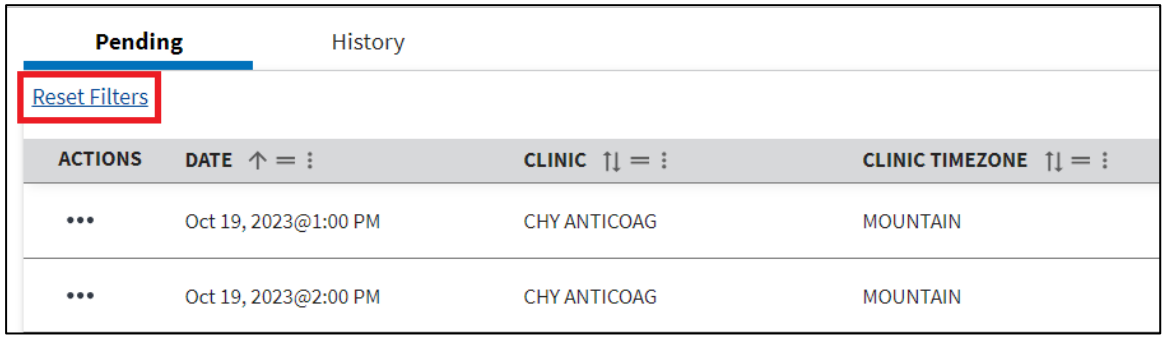


Figure 38: Reset Filters Button on Grid View

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 39**.

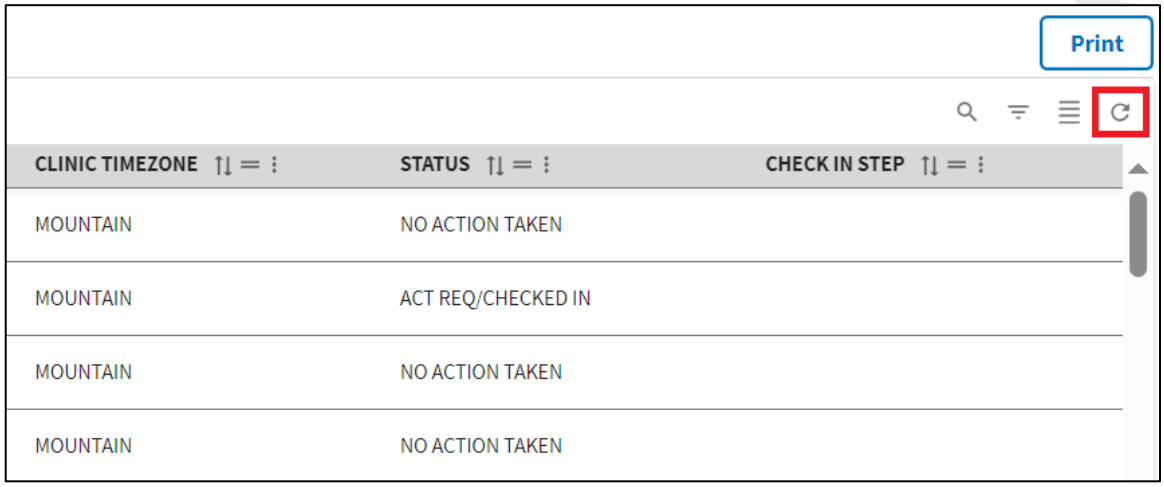


Figure 39: Refresh Table Button

2.3.8 Filtering & Navigating on Calendar

1. To navigate through the calendar, the user can use the arrows shown in **Figure 40**.

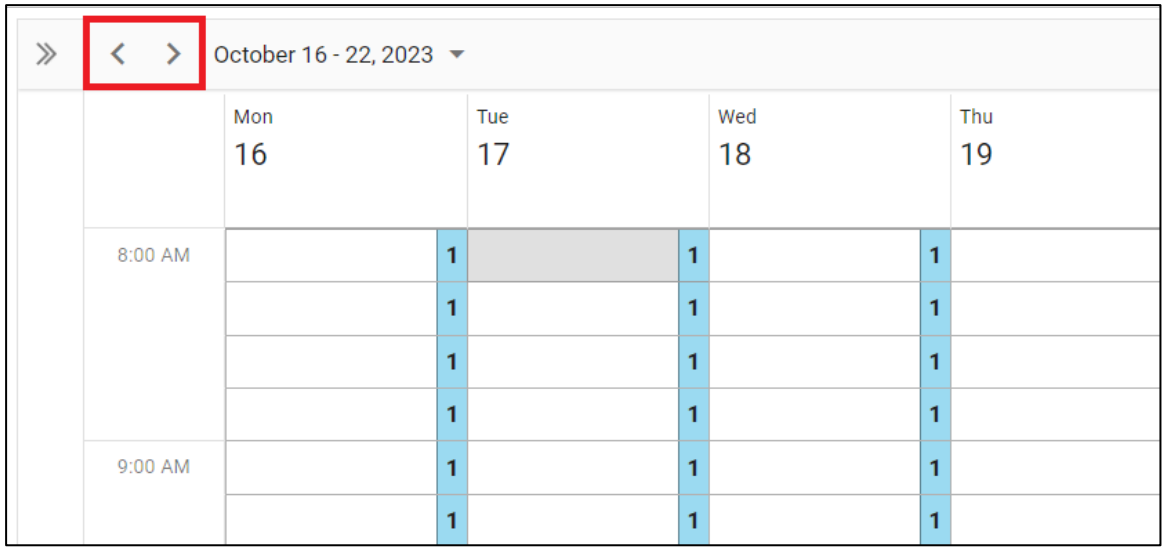


Figure 40: Arrow Buttons on Calendar to Change Dates

2. Optionally, the user can choose a specified date, as highlighted in **Figure 41**, by selecting the arrow to the right of the date.

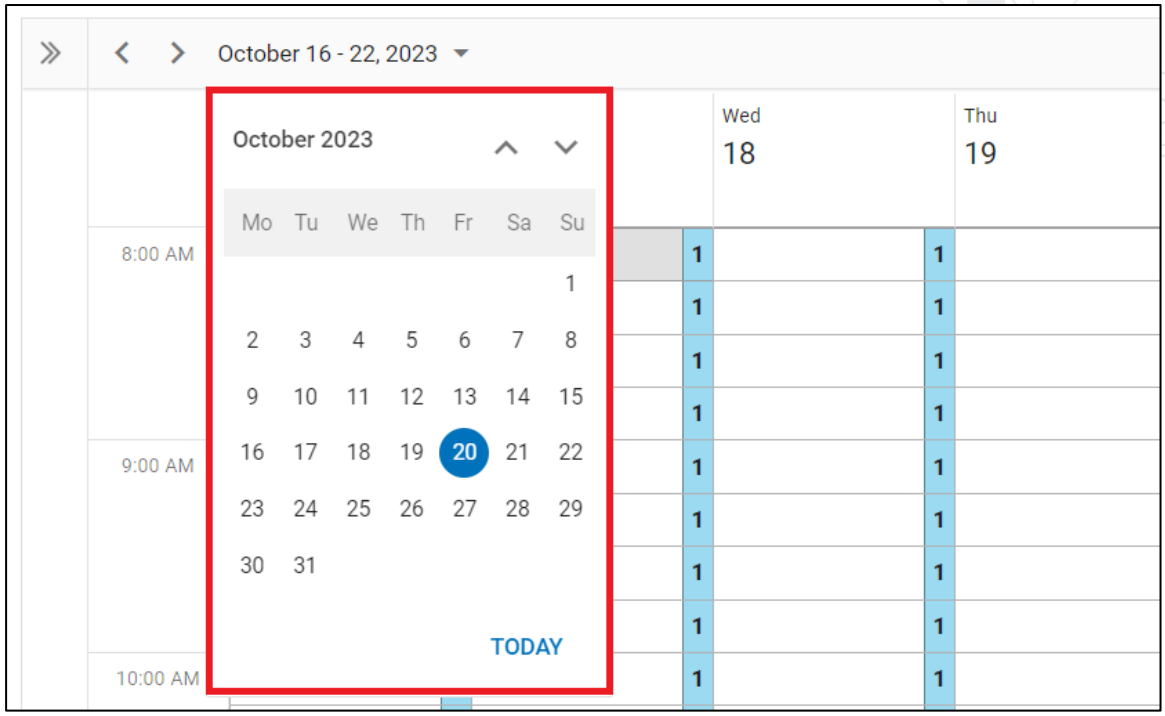


Figure 41: Mini Calendar on Calendar View to Choose Specific Date

3. Users can also choose to view the calendar in Day, Week, or Month mode by selecting the associated button shown below in **Figure 42**.

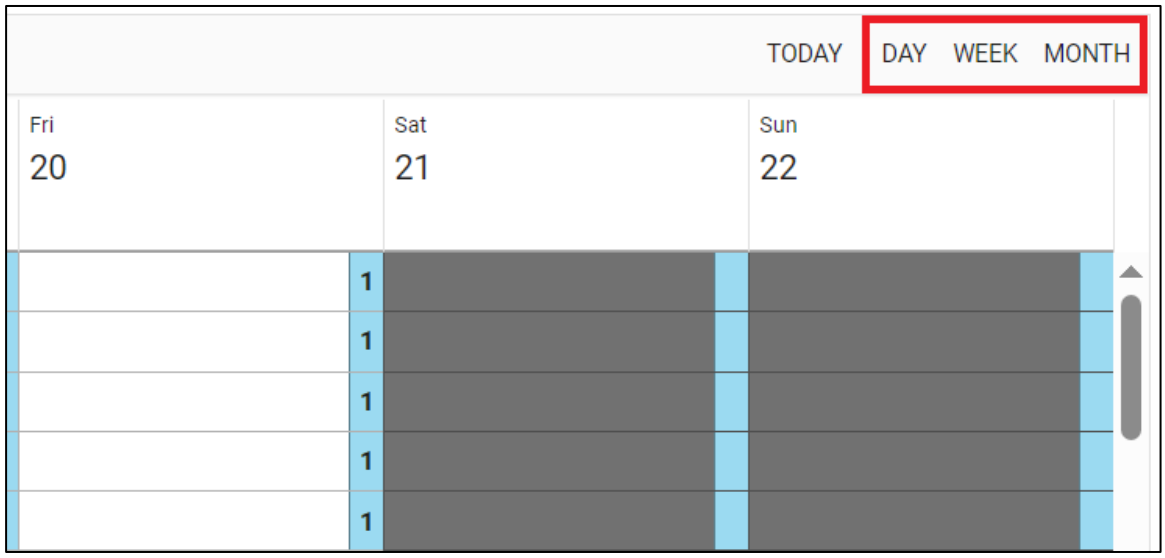


Figure 42: Changing Default Calendar View from Calendar

4. The user can also select the “Today” button, seen in **Figure 43**, at any point to bring the calendar back to the current date.

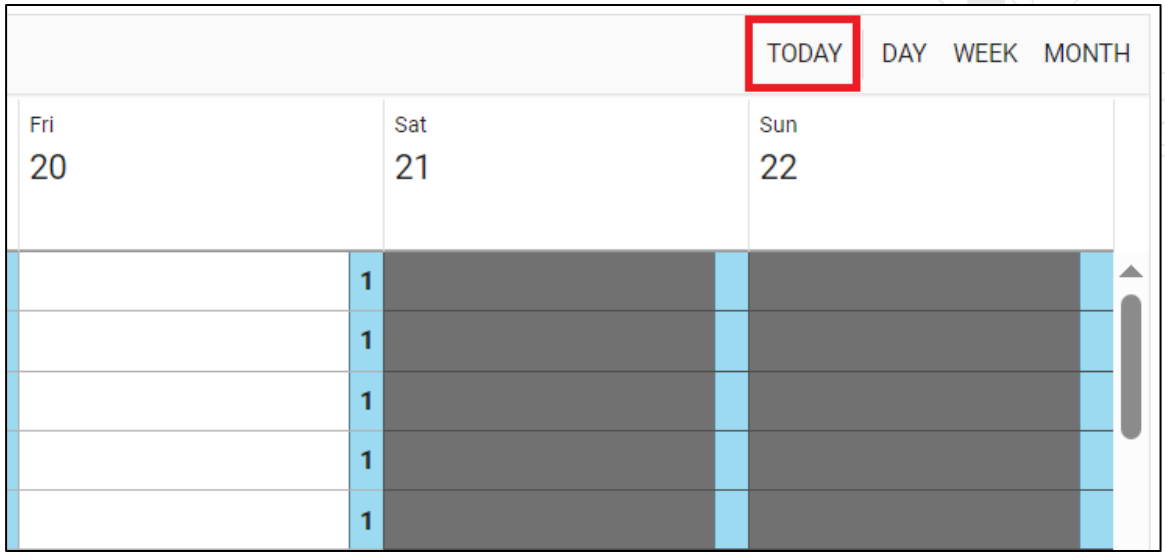


Figure 43: Bringing Calendar Back to Current Date on Calendar View

- *Note: The user can refresh the calendar at any time by selecting the "Refresh" button seen in **Figure 44**.*



Figure 44: Refresh Button on Calendar

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 45** for a description on which appointments will appear where depending on the corresponding status.

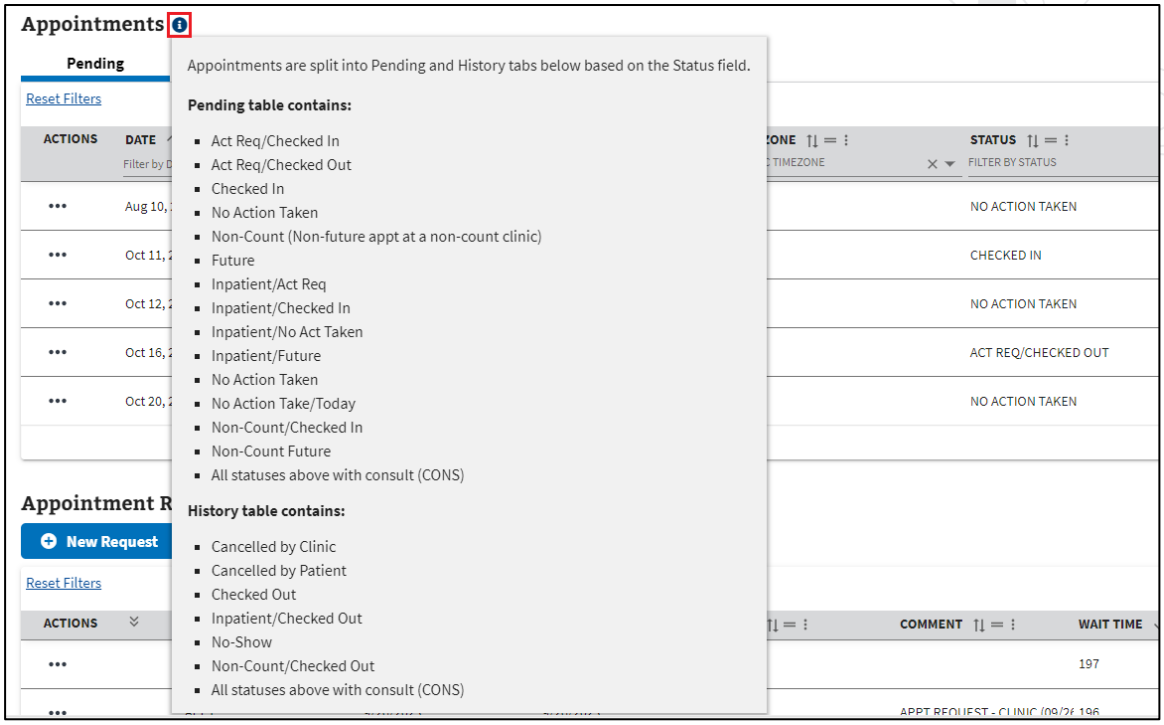


Figure 45: Information on the Pending and History Tabs for Appointments

3. Patient Overview

3.1 Patient Search

1. To search for a patient, the user will select the search bar, seen in **Figure 46**, and enter valid search criteria. Once entering the information, a list of patients will appear in a dropdown.

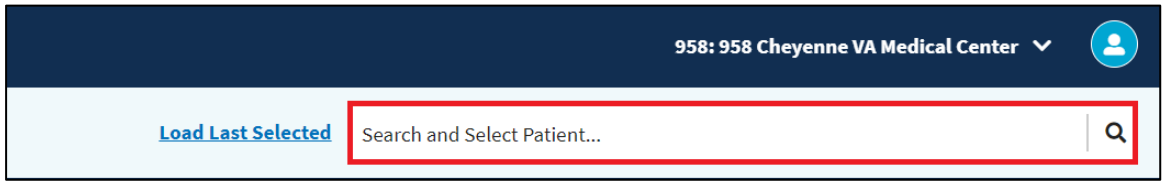


Figure 46: Patient Search Bar

- ❖ *Note: See **Figure 47** below for a list of valid search criteria for patient search.*

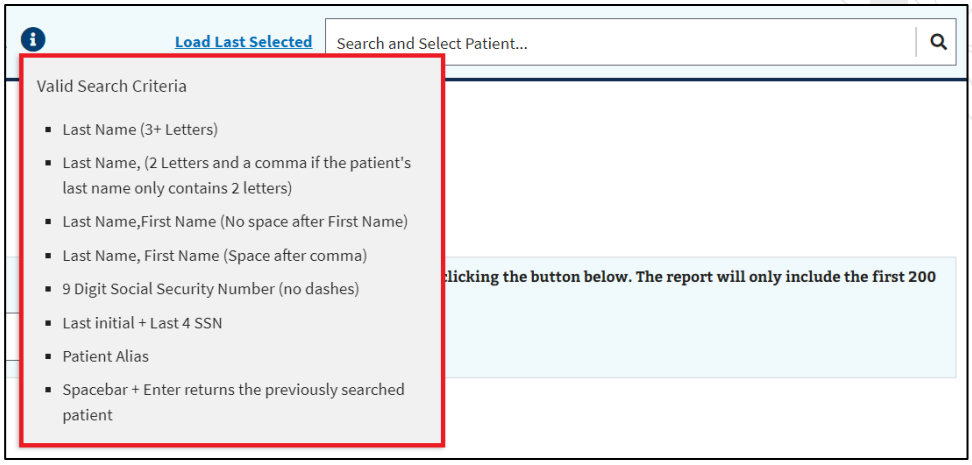


Figure 47: Valid Search Criteria for Patient Search

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 48**, and select "Acknowledge Eligibility" to continue.

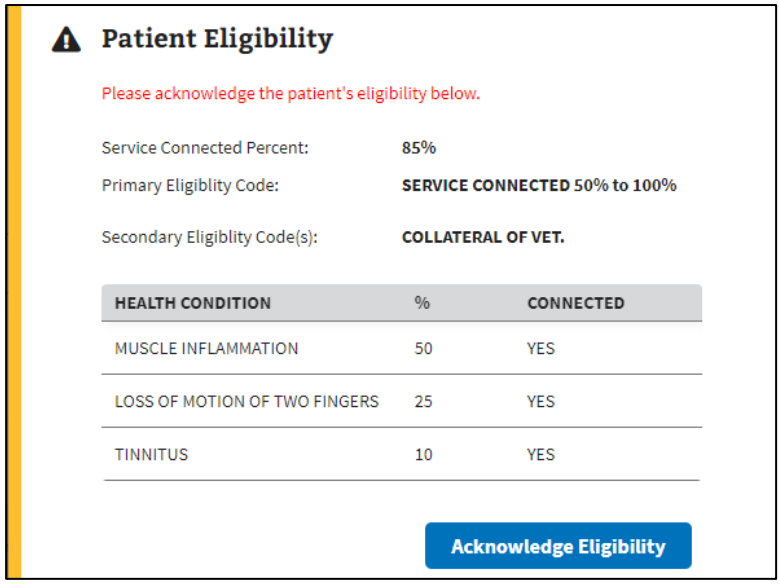


Figure 48: Patient Eligibility Notification

- ❖ *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 49**.

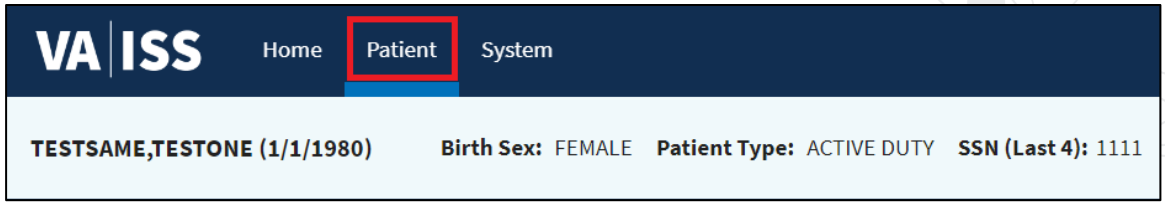


Figure 49: Patient Tab from the Home Screen

5. To bring a new patient into context, the user will need to select the "Clear" button seen below in **Figure 50**. The page will automatically reload and "No Patient in Context" will be shown.



Figure 50: 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 51**, or type "spacebar + enter" into the search bar.

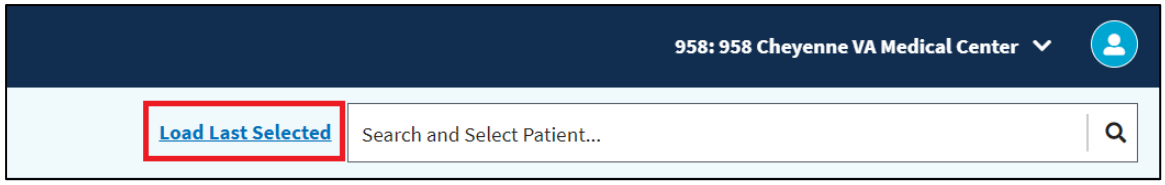


Figure 51: Load Last Selected Button for Patient Search

3.2 Patient Profile Home

The Patient Profile Page can be navigated to by selecting the "Patient Profile Home" tab shown in **Figure 52**. This page gives a brief overview of the patient's information.

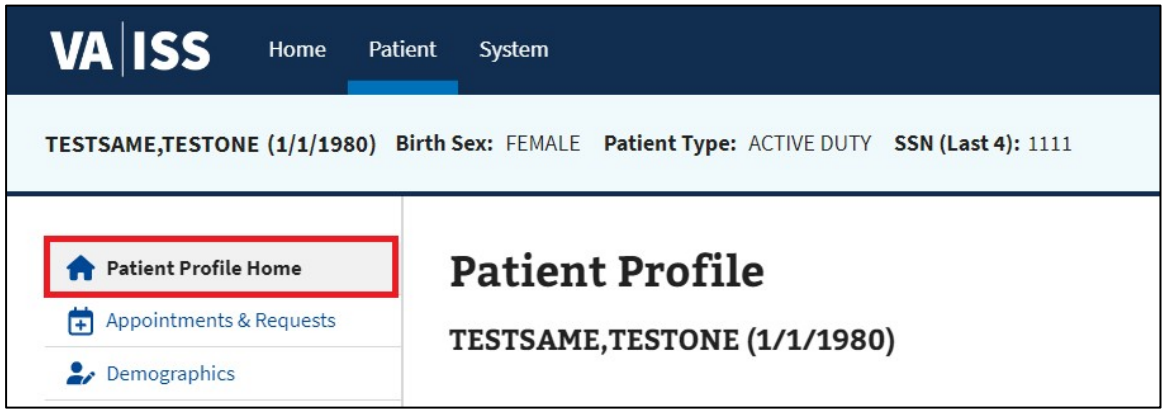


Figure 52: Example of Patient Profile Home Tab

3.3 Appointments & Requests

The Appointments & Requests Page can be navigated to by selecting the "Appointments & Requests" tab shown in **Figure 53**. 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 53: Example of Appointments & Requests Tab

3.4 Demographics

1. The Demographics Page can be navigated to by selecting the "Demographics" tab shown in **Figure 54**.

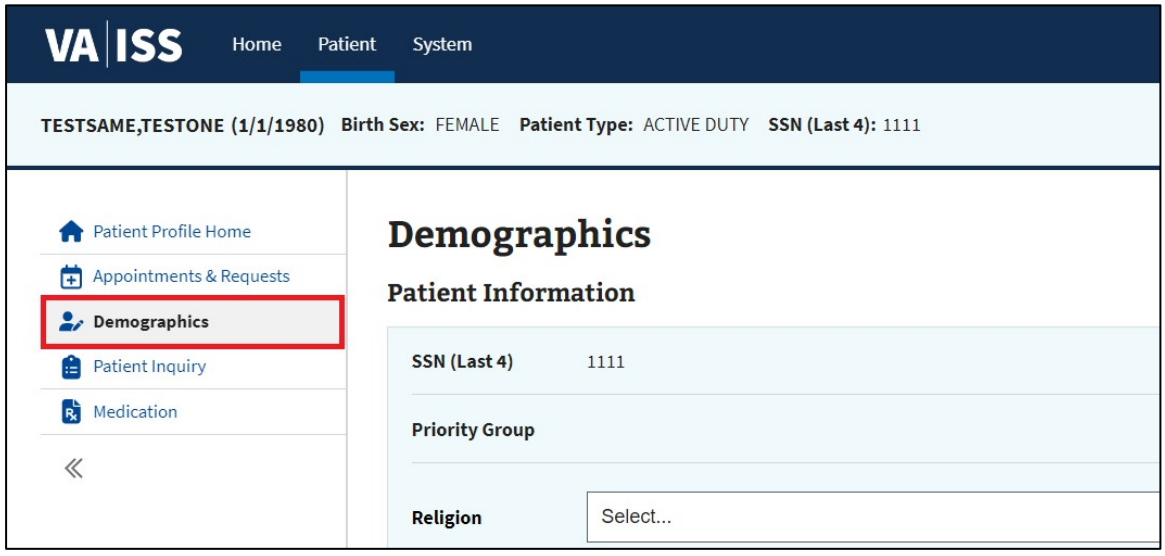


Figure 54: Demographics Tab

2. Users can edit the fields that appear within the Demographics page as shown in **Figure 55** below.

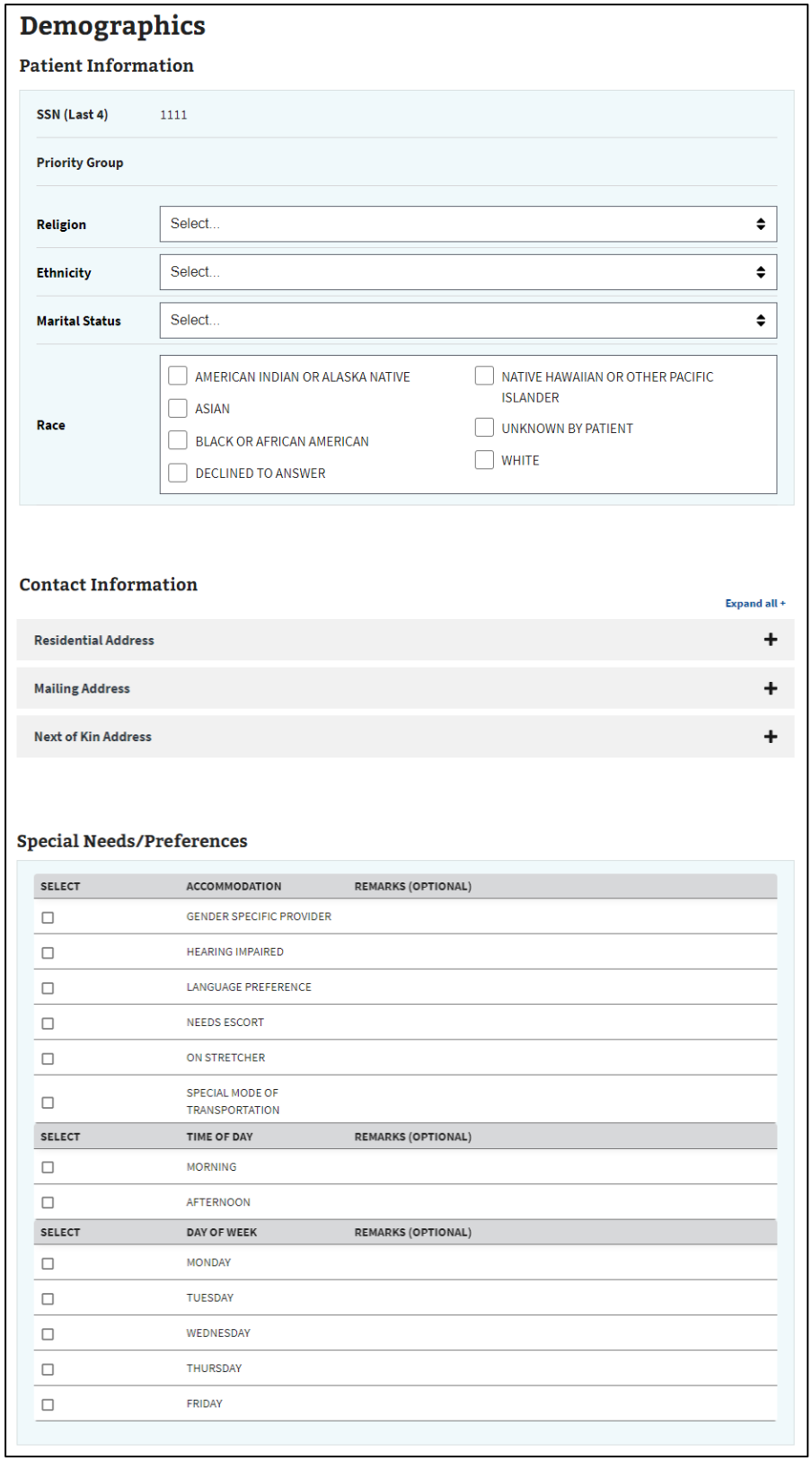


Figure 55: Example of the Demographics Page

- *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 a patient's mailing address who has an active prescription, the user will receive a notification asking to confirm the location change of where the prescriptions are being sent (see **Figure 56** below).*

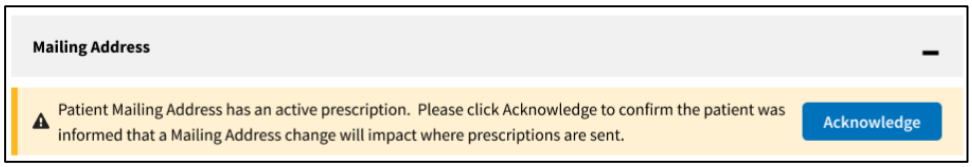


Figure 56: Mailing Address Change Notification with Active Prescription

- *Note: When editing Special Needs and Preferences, the user can add remarks to any of the individual options seen below in **Figure 57**. 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.*

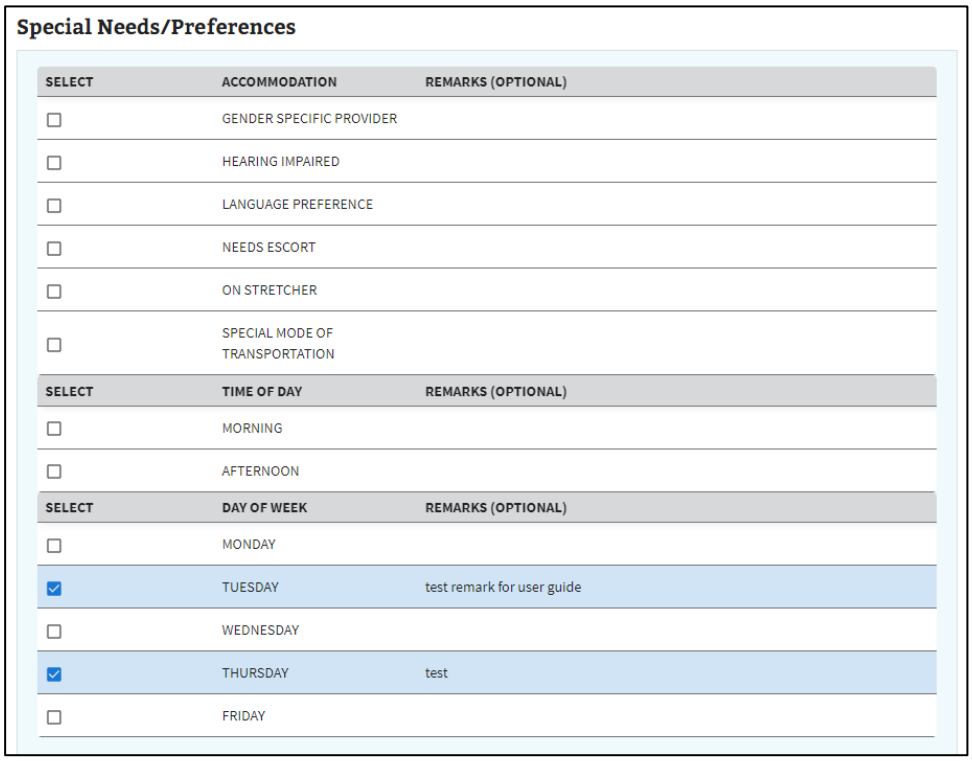


Figure 57: Special Needs/Preferences Options

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 58**, to save any changes made.

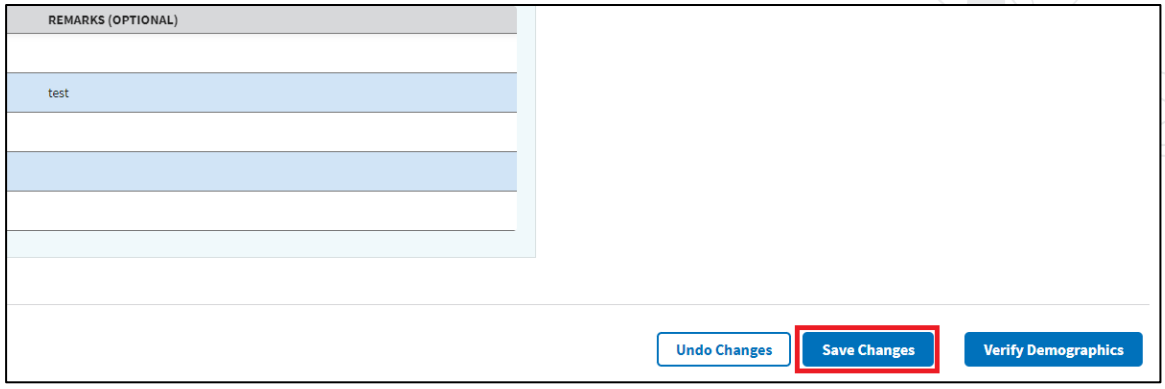


Figure 58: Save Changes Button for the Demographics Page

- *Note: The user can verify the patient's demographics by selecting "Verify Demographics" seen in **Figure 59**.*

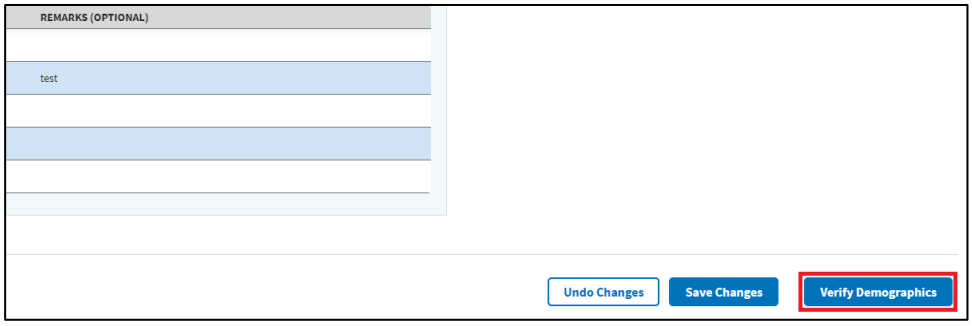


Figure 59: Verify Demographics Button

- *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 60**.*

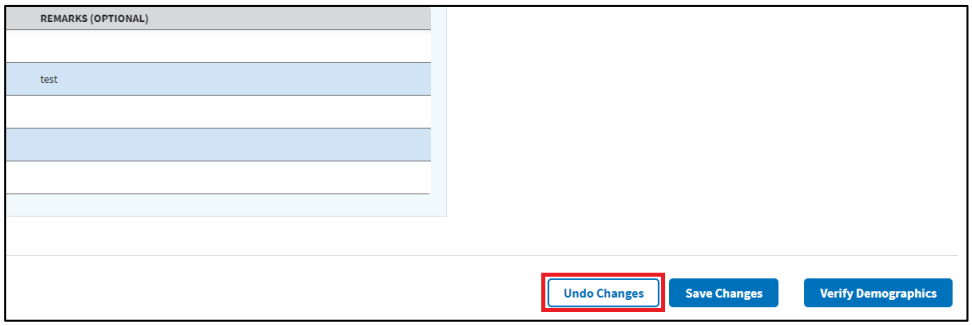


Figure 60: Undo Changes Button for Demographics Page

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 61**, to see more information regarding the selected patient and their demographics.



Figure 61: 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 62**, to take them to the Demographics tab (see **3.4 Demographics** for more information on editing).

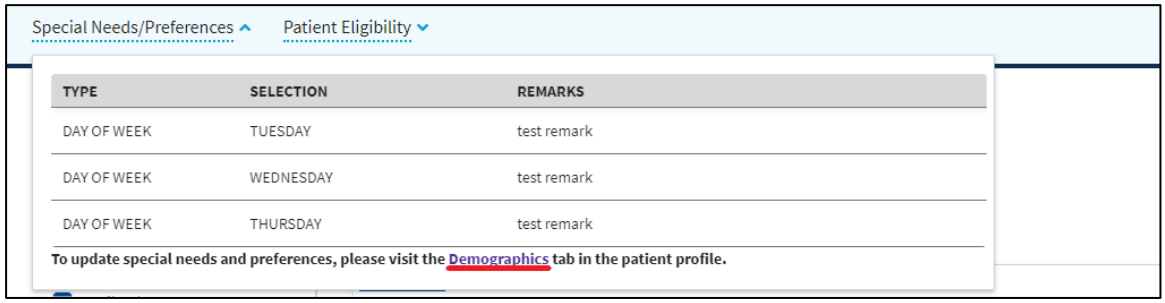


Figure 62: Demographics Link in the Special Needs/Preferences Dropdown

The user can also select the Patient Eligibility dropdown seen in **Figure 63** to view more specific information about the patient's eligibility and health conditions.

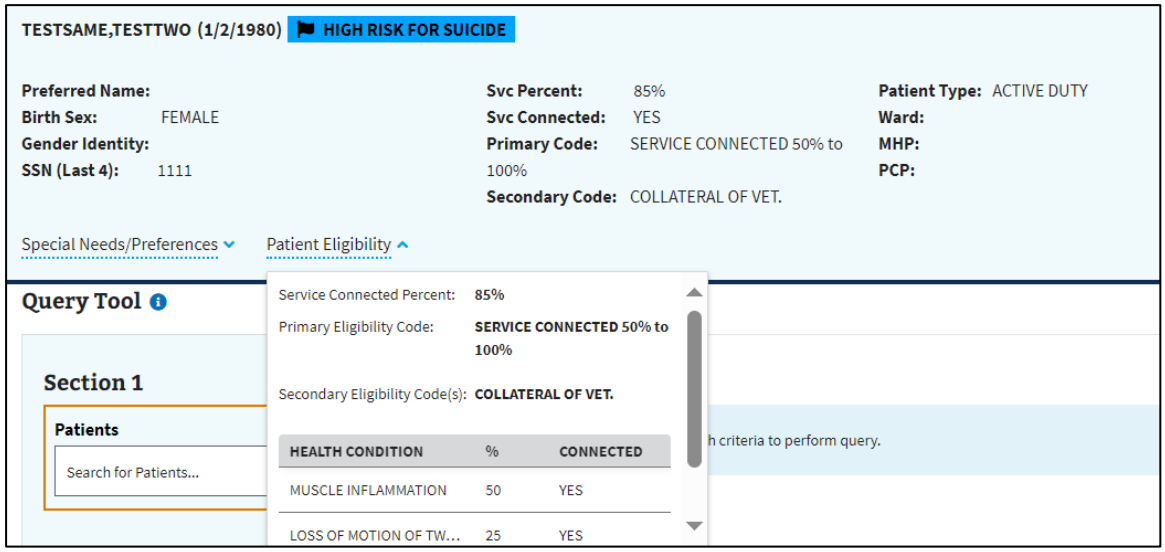


Figure 63: Patient Eligibility Dropdown

- *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 64**). For more information on video visits please see **4.5 Video Visits**.*

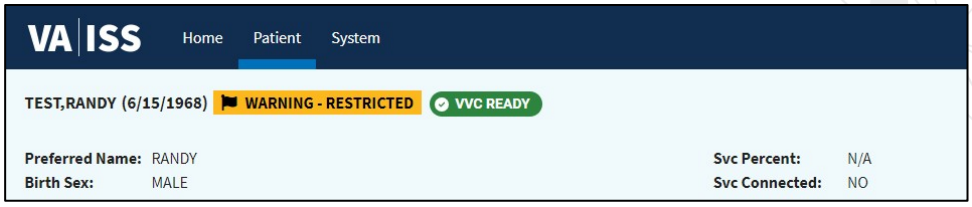


Figure 64: VVC Ready Pill

3.5 Patient Inquiry

The Patient Inquiry Page can be navigated to by selecting the "Patient Inquiry" tab shown in **Figure 65**. On this page, users can view information about the patient such as contact information, demographics, status, future appointments, etc.

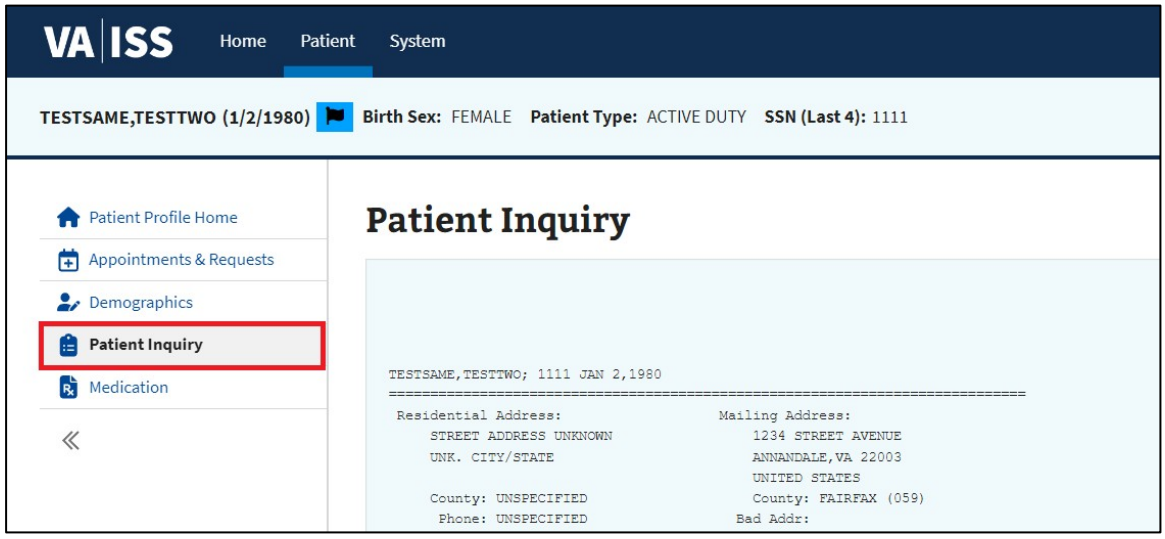


Figure 65: Example of Patient Inquiry Tab

3.6 Medication

The Medication Page can be navigated to by selecting the "Medication" tab shown in **Figure 66**. This page will list any medications the patient uses or have been prescribed.

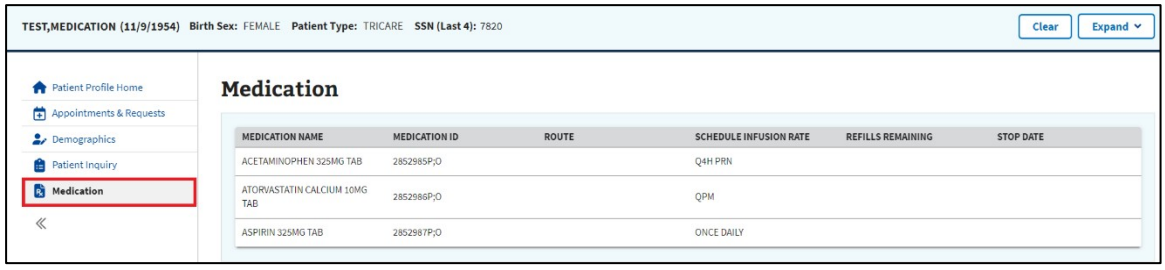


Figure 66: Example of Medication Tab

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 67**.

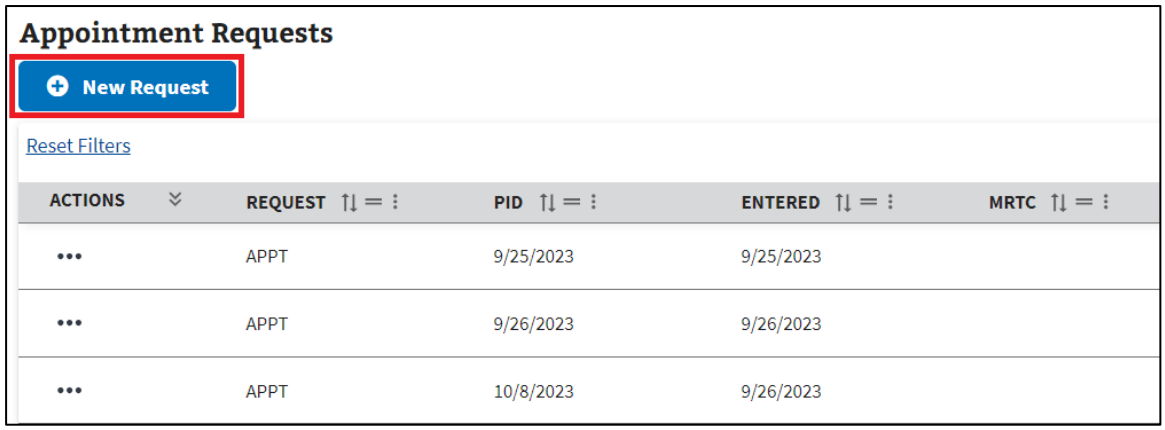


Figure 67: New Requests Button for APPT Requests

2. The user will then select "APPT" from the dropdown that appears in **Figure 68** below.

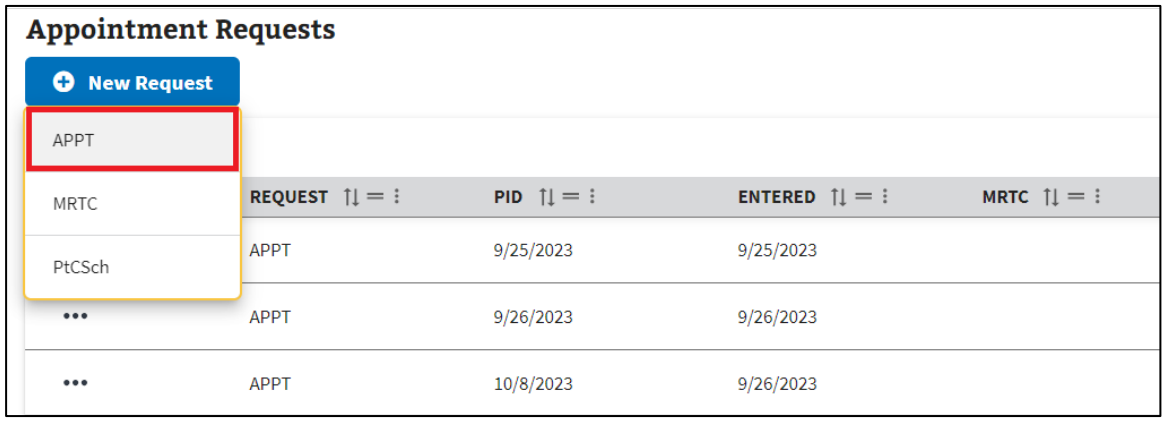


Figure 68: APPT Option from the New Request Dropdown

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 69**. The user can also fill out any optional information as needed.

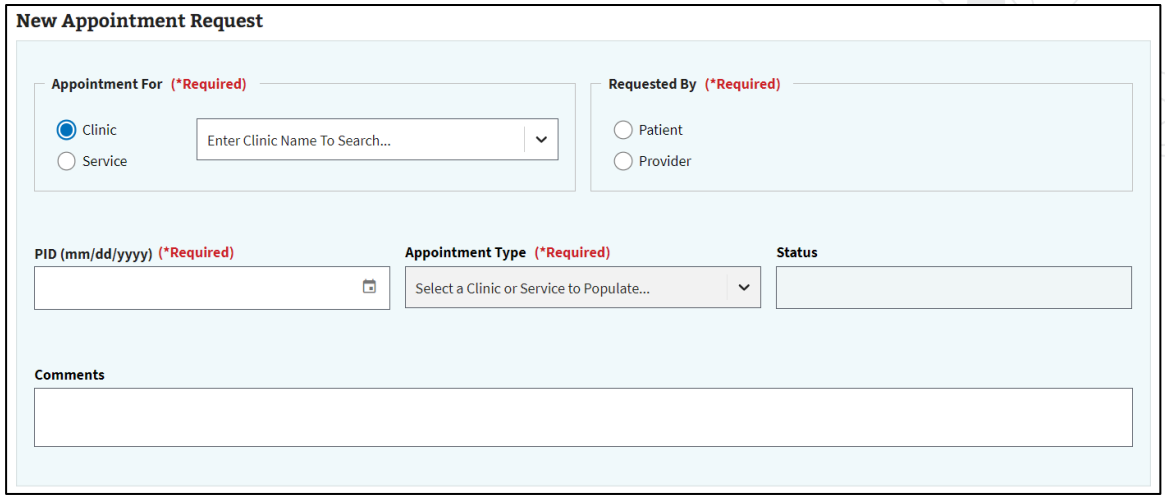


Figure 69: New Appointment Request Page for APPT

- *Note: The ISS application will automatically cross check to ensure no duplicate appointment requests are being made for the selected clinic/service. If there are no potential duplicate requests, the notification seen in **Figure 71** will appear in green and the user can continue creating the appointment request. If there are potential duplicate appointment request(s), the notification and table shown in **Figure 70** will appear. Please see **4.1.7 Dispositioning Duplicate Clinic Requests** for more information on handling duplicate appointments when creating a request for a clinic and **4.1.8 Dispositioning Duplicate Service Requests** when creating a request for a service.*

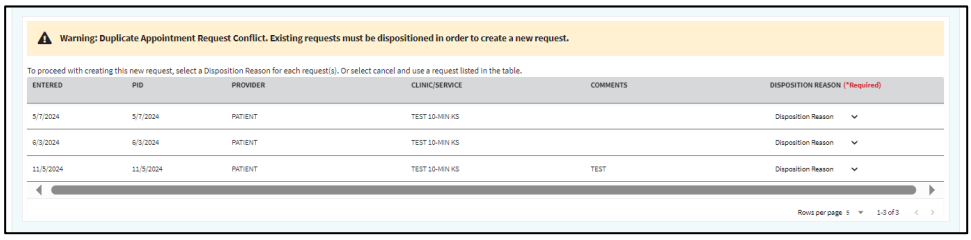


Figure 70: Duplicate Appointment Conflicts Example for APPT

4. Once all applicable information has been filled, the user will select the “Create Request” button, seen in **Figure 71**, to create the new APPT request.

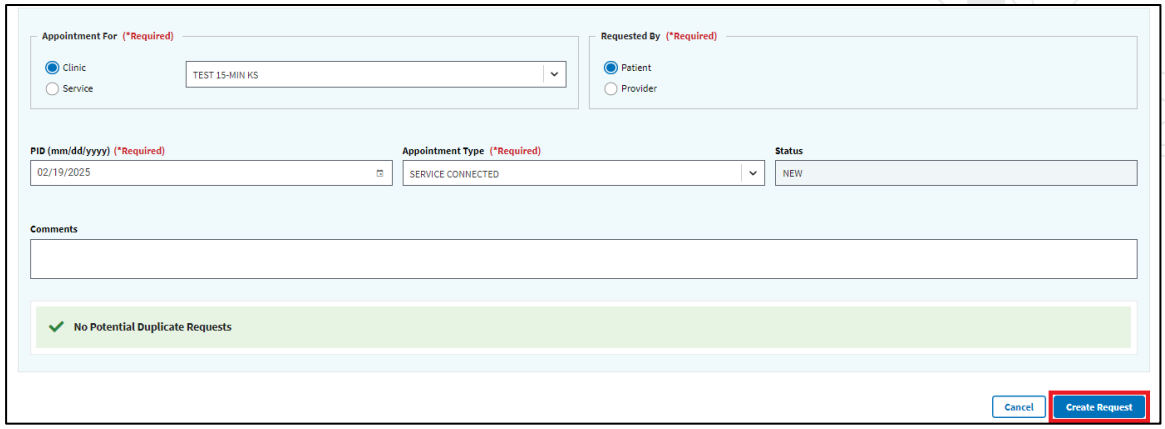


Figure 71: Create Request Button for APPT Request

- *Note: The user can also select the "Cancel" button seen in **Figure 71** 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 72**.

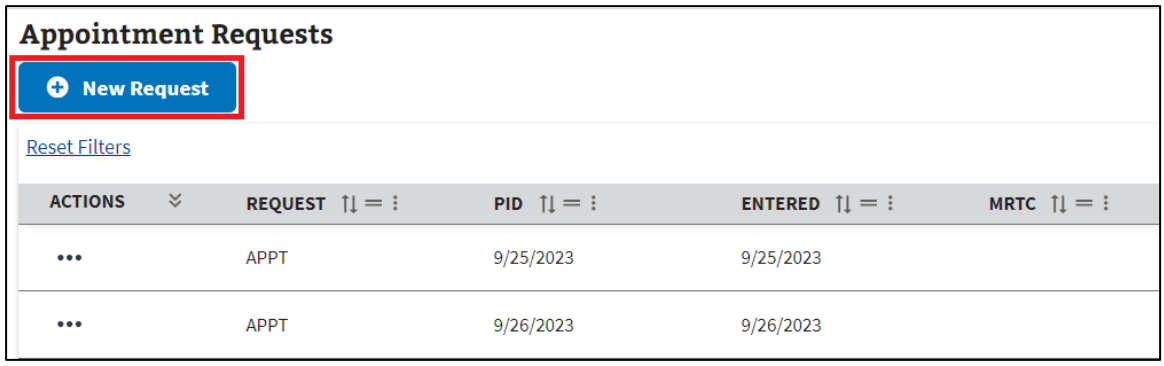


Figure 72: New Request Button for PtCSch Requests

2. The user will then select "PtCSch" from the dropdown that appears in **Figure 73** below.

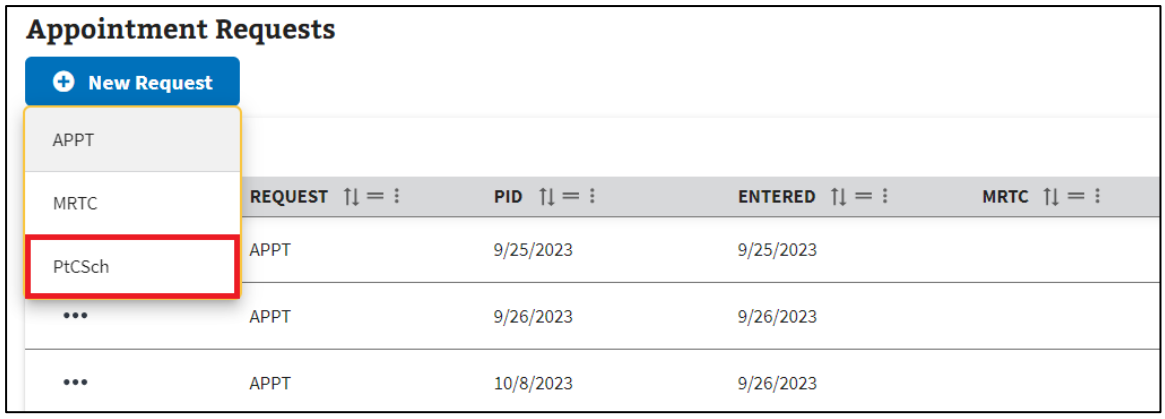


Figure 73: PtCSch Option from the New Request Dropdown

3. 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 74**. The user can also fill out any optional information as needed.

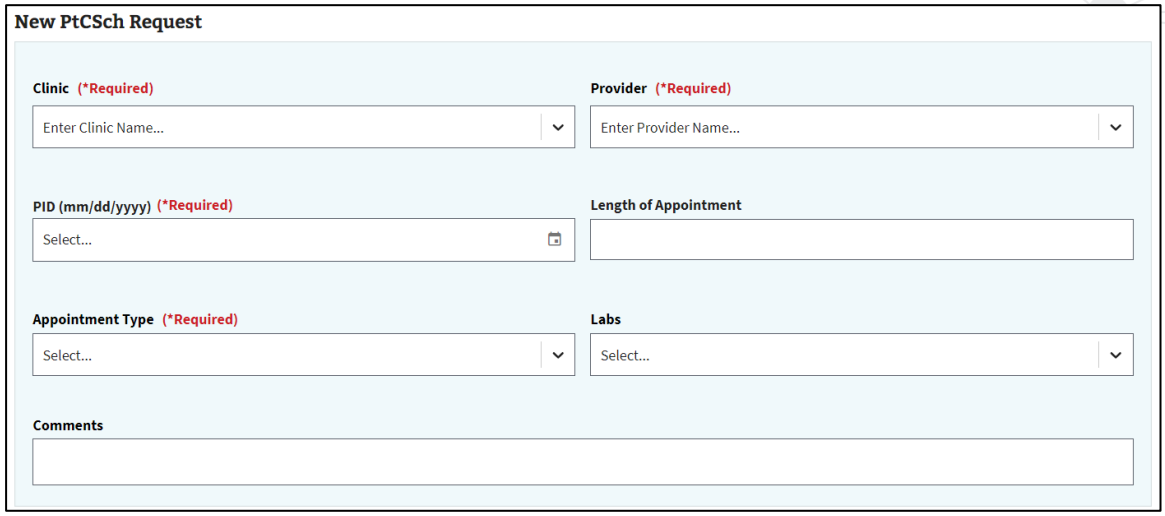


Figure 74: New PtCSch Request Page

- *Note: The ISS application will automatically cross check to ensure no duplicate appointment requests are being made for the selected clinic/service. If there are no potential duplicate requests, the notification seen in **Figure 76** will appear in green and the user can continue creating the appointment request. If there are potential duplicate appointment request(s), the notification and table shown in **Figure 75** will appear. Please see **4.1.7 Dispositioning Duplicate Clinic Requests** for more information on handling duplicate appointments when creating a request for a clinic and **4.1.8 Dispositioning Duplicate Service Requests** when creating a request for a service.*

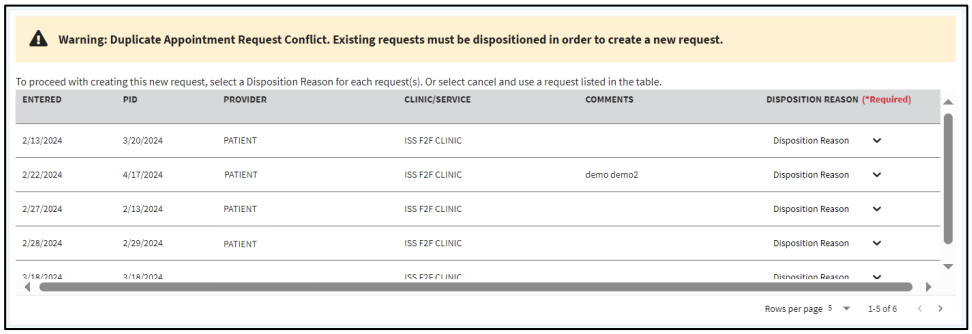


Figure 75: Duplicate Appointment Conflicts Example for PtCSch

4. 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.

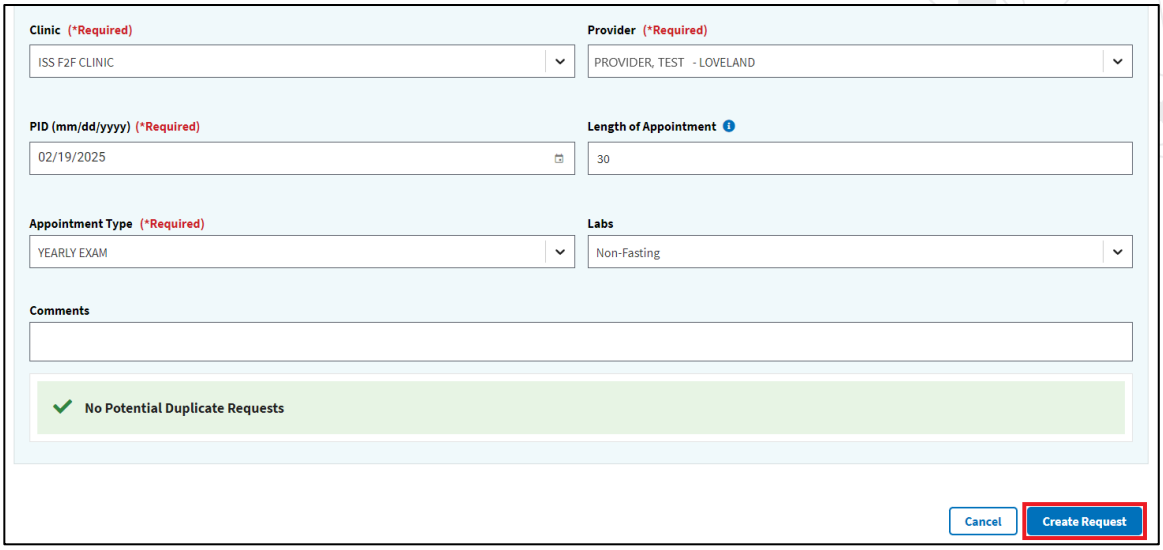


Figure 76: Create Request Button for PtCSch Requests

- *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**.

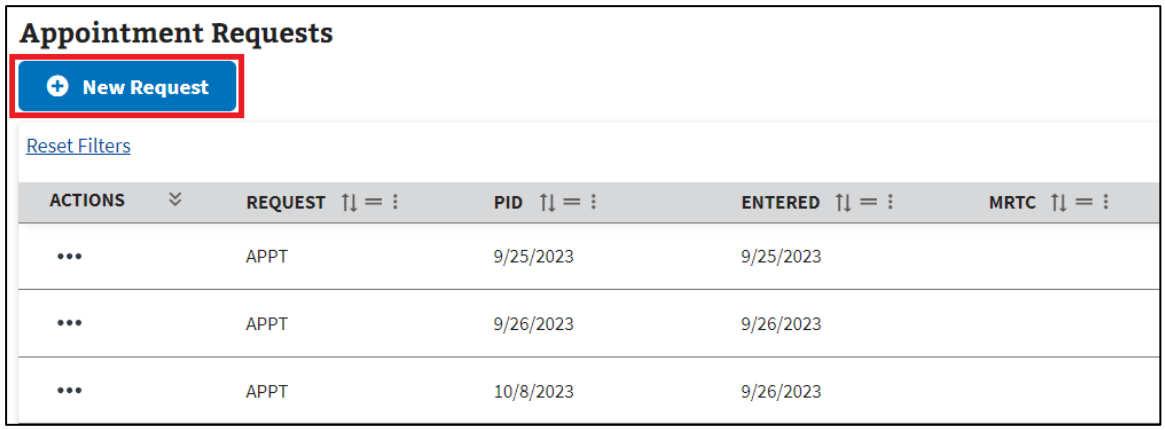


Figure 77: New Request Button for MRTC Requests

2. The user will then select "MRTC" from the dropdown that appears in **Figure 78** below.

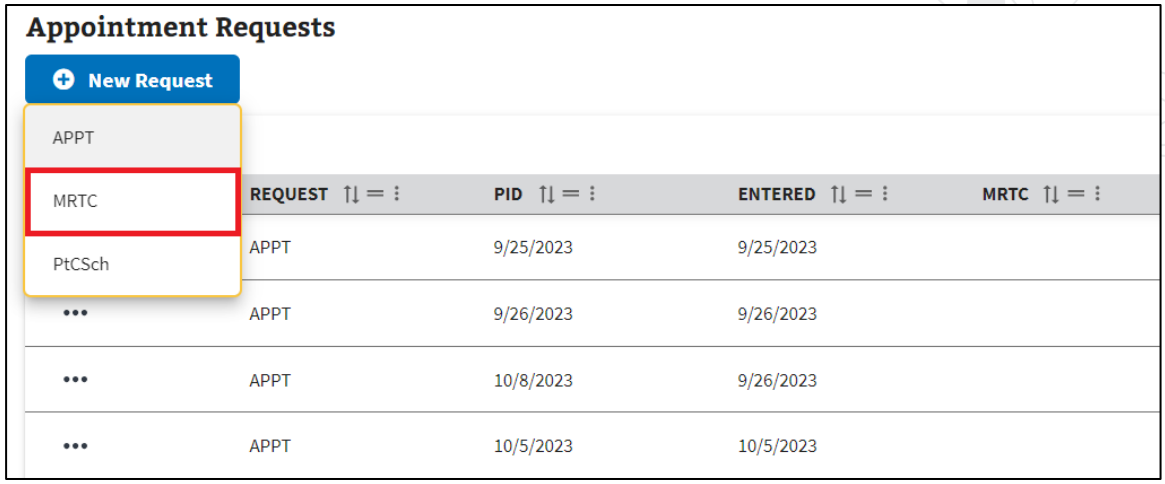


Figure 78: MRTC Option from New Request Dropdown

3. 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.

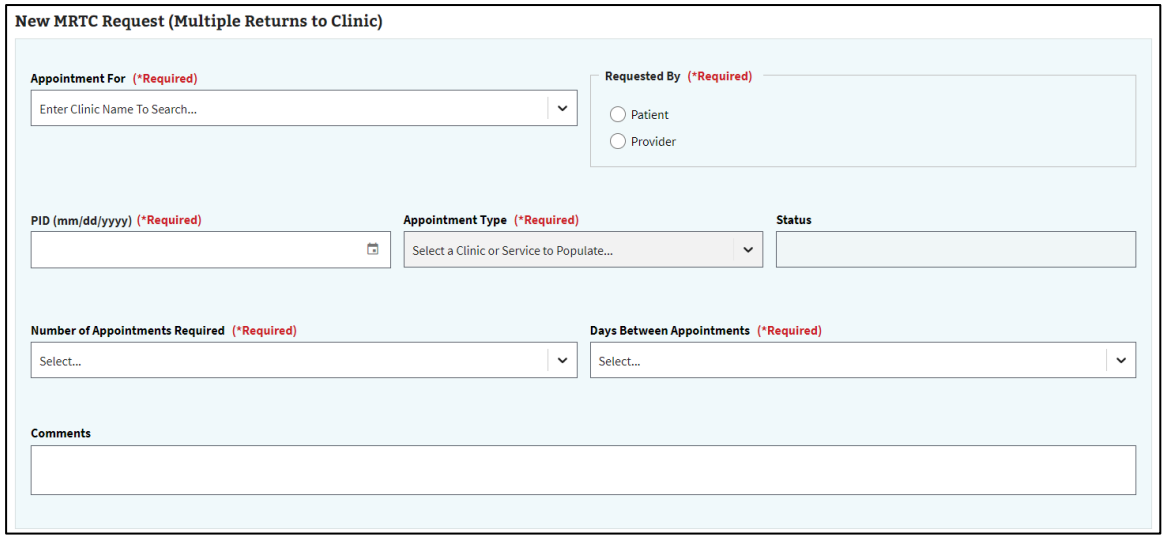


Figure 79: New MRTC Request Page

4. 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.

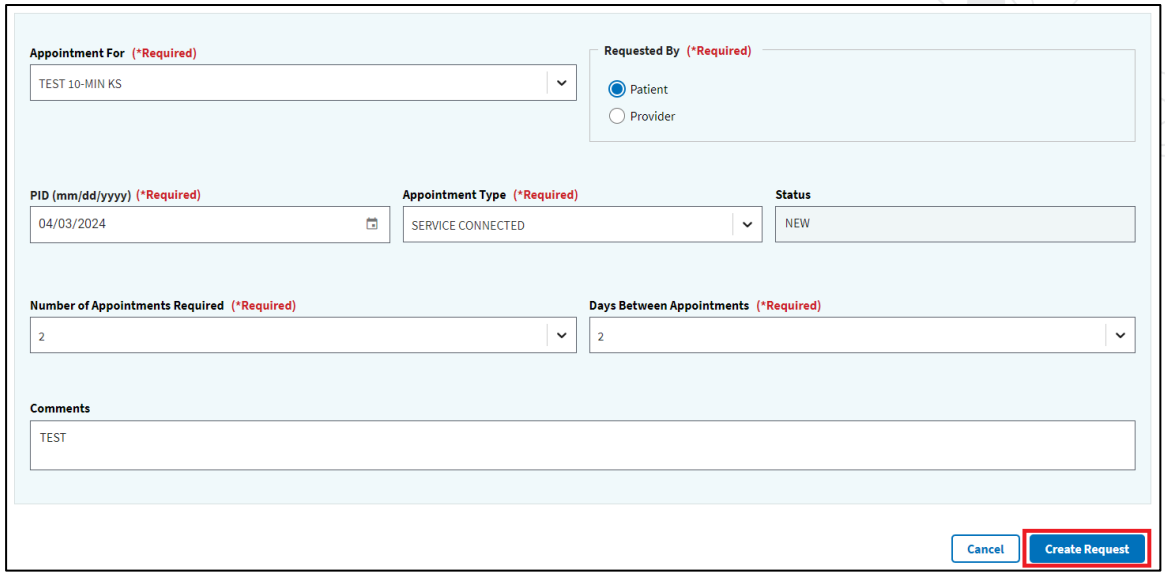


Figure 80: Create Request Button for MRTC Requests

- *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.)

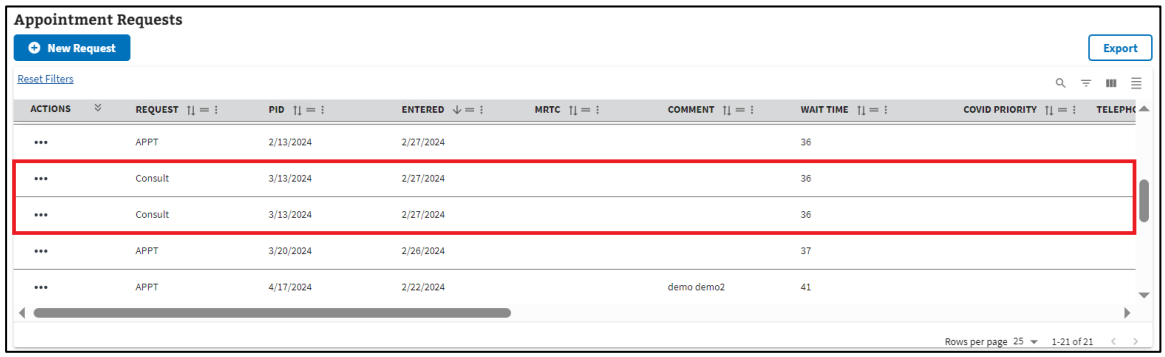


Figure 81: Example of Consult Requests in the Grid

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).

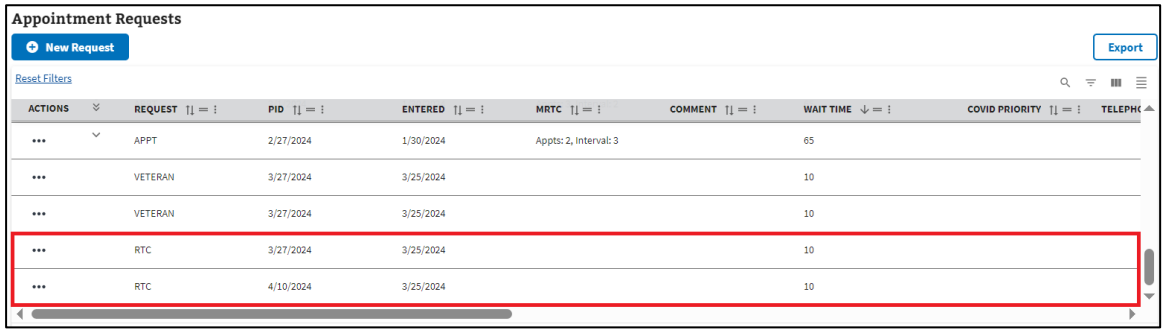


Figure 82: Example of RTC Requests in the Grid

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).

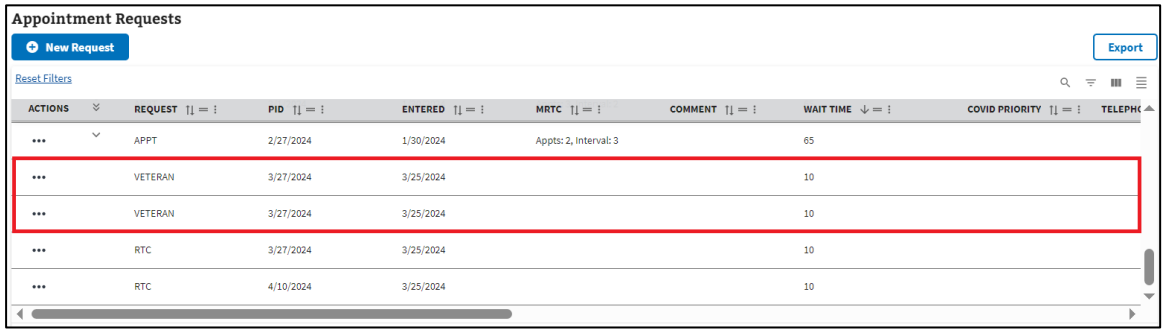


Figure 83: Example of VETERAN Requests in the Grid

4.1.7 Dispositioning Duplicate Clinic Requests

When creating an appointment request for APPT or PtCSch, the ISS application will cross-check duplicate clinic requests within the system for the current patient. The steps below detail how to handle these requests. For more information on APPT or PtCSch, see sections **4.1.1 APPT** and **4.1.2 PtCSch (Recall)**.

1. Navigate to the "Warning: Duplicate Appointment Request Conflict. Existing requests must be dispositioned in order to create a new request" notification, shown in **Figure 84**.

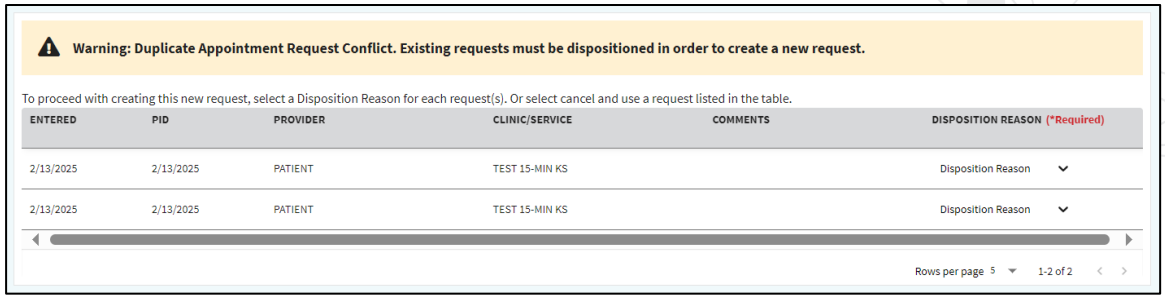


Figure 84: Duplicate Appointments Warning for Clinic Requests

2. The user will then need to review each appointment listed in the table and decide whether to cancel a previously made appointment request(s), or to cancel the current request being created. If the user decides to continue with the current request, the other appointment request(s) will need to be dispositioned.

3. To remove existing appointments, the user will need to select a disposition reason listed within the dropdown in the Disposition Reason column shown in **Figure 85**. This step may need to be repeated if there are multiple duplicate requests that need to be dispositioned.

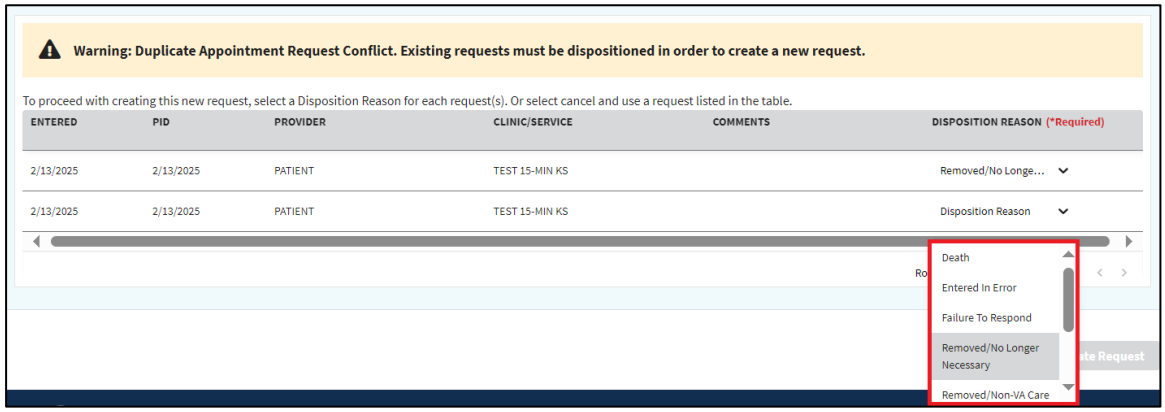


Figure 85: Disposition Dropdown for Clinic Requests

- ❖ *Note: The user may need to navigate between pages of the table to find all duplicate requests. For more information, please see section **2.3.5 Filtering Rows**.*

4. Once all previously created appointment requests have been given a disposition reason and all the required information has been inputted for the appointment request, the user can then select “Create Request.”

4.1.8 Dispositioning Duplicate Service Requests

When creating an appointment request for APPT, the ISS application will cross-check duplicate service requests within the system for the current patient. The steps below detail how to handle these requests. For more information on APPT, see section **4.1.1 APPT.**

1. Navigate to the “Warning: Duplicate Appointment Request Conflict. Existing requests must be dispositioned in order to create a new request” notification, seen in **Figure 86**.

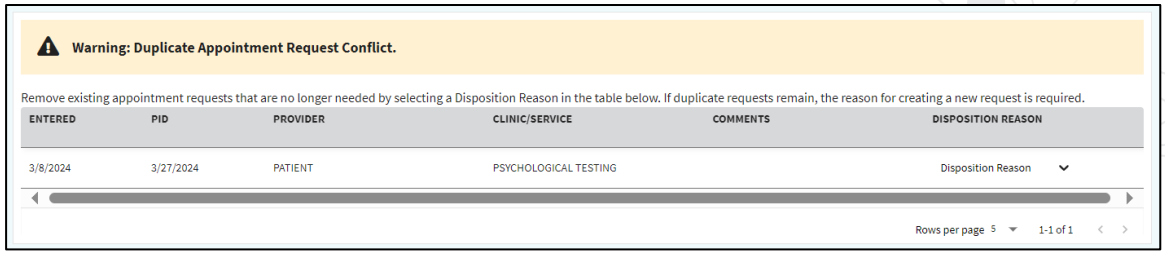


Figure 86: Duplicate Appointments Warning for Service Requests

2. The user will then need to review each appointment listed in the table and decide whether to cancel a previously made appointment request(s), to cancel the current request being created, or to do a combination of both. If the user decides to continue with the current request, the other appointment request(s) will either need to be dispositioned or be given a reason for why they should remain with the new request.
3. For the appointment requests that need to be dispositioned, select a disposition reason listed within the dropdown in the Disposition Reason column, shown in **Figure 87**. This step may need to be repeated if there are multiple duplicate requests that need to be dispositioned.

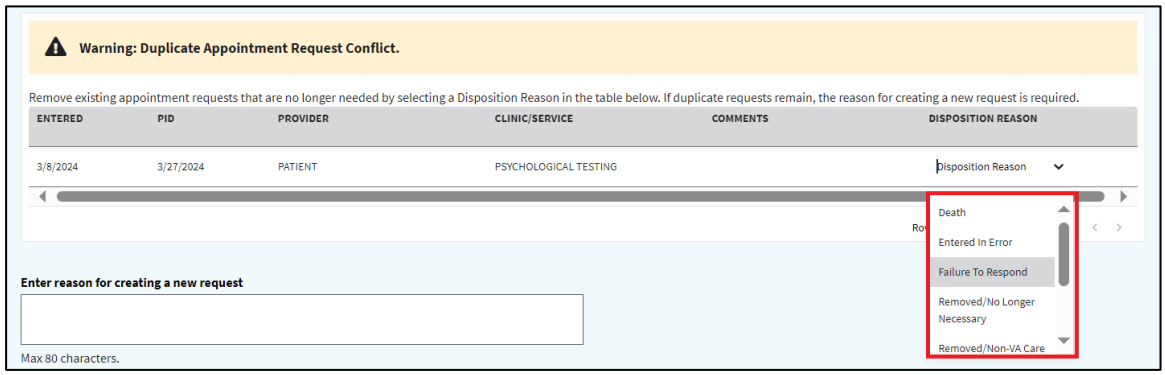


Figure 87: Disposition Dropdown for Service Requests

- ❖ *Note: The user may need to navigate between pages of the table to find all duplicate requests. For more information, please see section **2.3.5 Filtering Rows**.*

4. For the appointment requests that will remain, the user will need to leave the disposition reason in the default state. The user will then need to enter a reason for creating a new request in the text box shown in **Figure 88**.

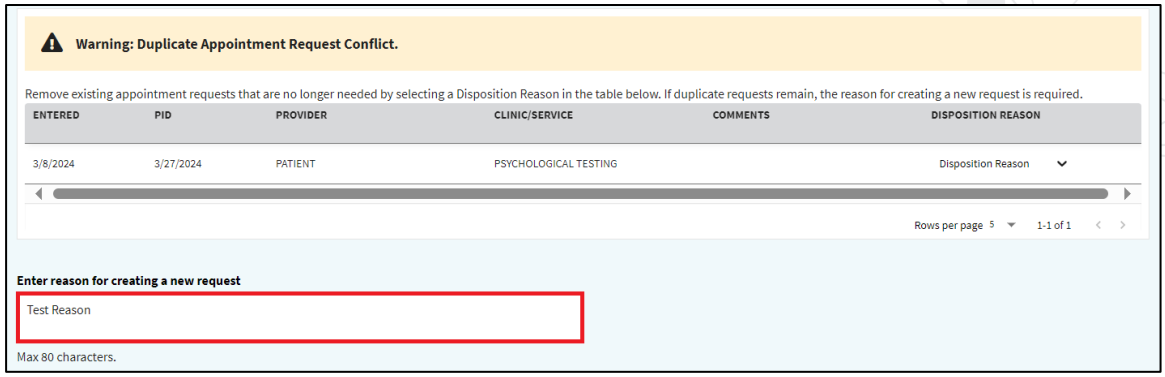


Figure 88: Reason Text Box for not Dispositioning Service Requests

5. Once all of the previous steps have been completed successfully and all the required information has been inputted for the appointment request, the user can then select "Create Request."

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 89**, next to any appointment within the grid.

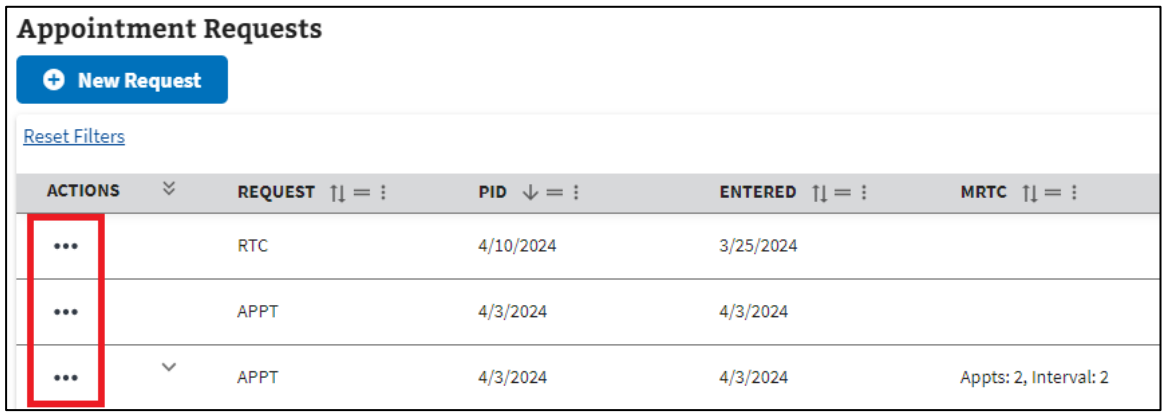


Figure 89: Selecting Action Menu Button to View Requests

2. This will cause the action menu to appear. The user will then need to select the "View" option, seen in **Figure 90**.

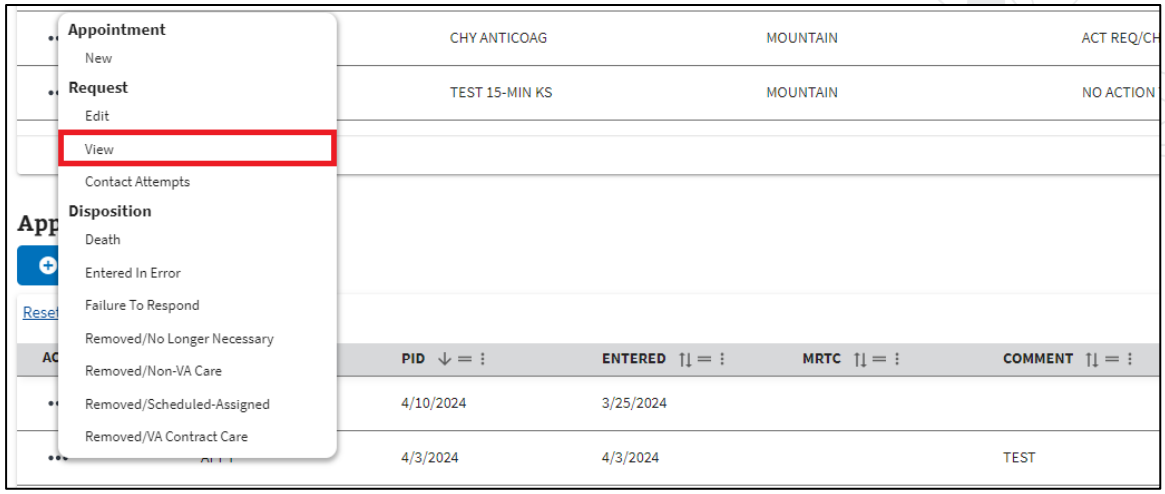


Figure 90: View Option from the Request Actions Dropdown

3. The user will be brought to the View (Appointment Request Type) Request page, shown below in **Figure 91**.

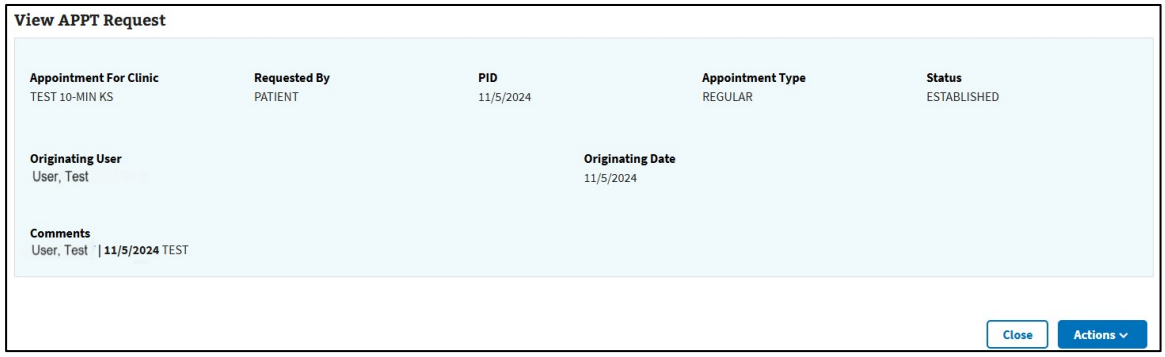


Figure 91: View APPT Request Page

- *Note: Users can perform Appointment Requests actions via the view request page by selecting the "Actions" button seen in **Figure 91.** This will cause the action menu to appear (see **Figure 92** for example). For more information on Appointment Request actions, see the following sections **4.2.2 Editing Appointment Requests** - **4.2.7 Disposition an MRTC Child Request**.*

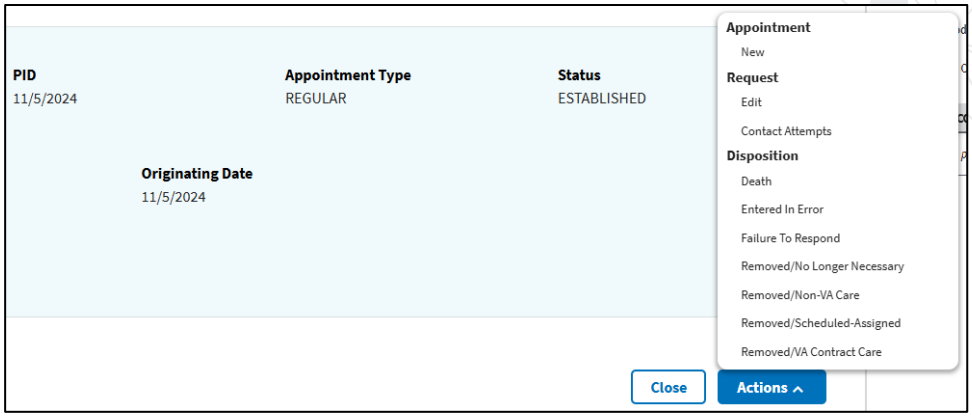


Figure 92: Action Menu from the View Request Page

- *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 91** for example).*

4.2.2 Editing Appointment Requests

1. To edit an appointment request, the user will select the ellipsis, seen in **Figure 93**, next to any appointment within the grid.

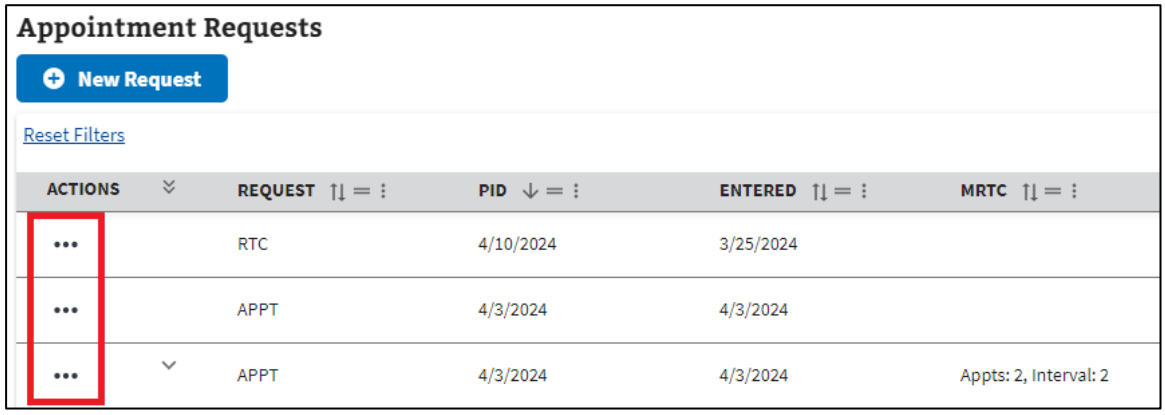


Figure 93: Selecting Action Menu Button to Edit Requests

2. This will cause the action menu to appear. The user will then need to select the “Edit” option, seen in **Figure 94**.

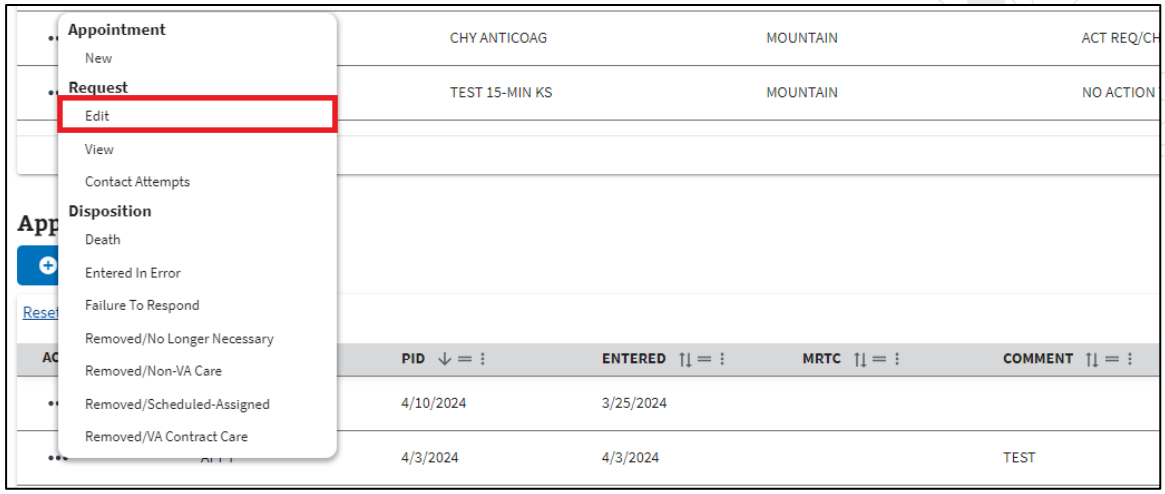


Figure 94: Edit Option from the Request Actions Dropdown

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 95**.

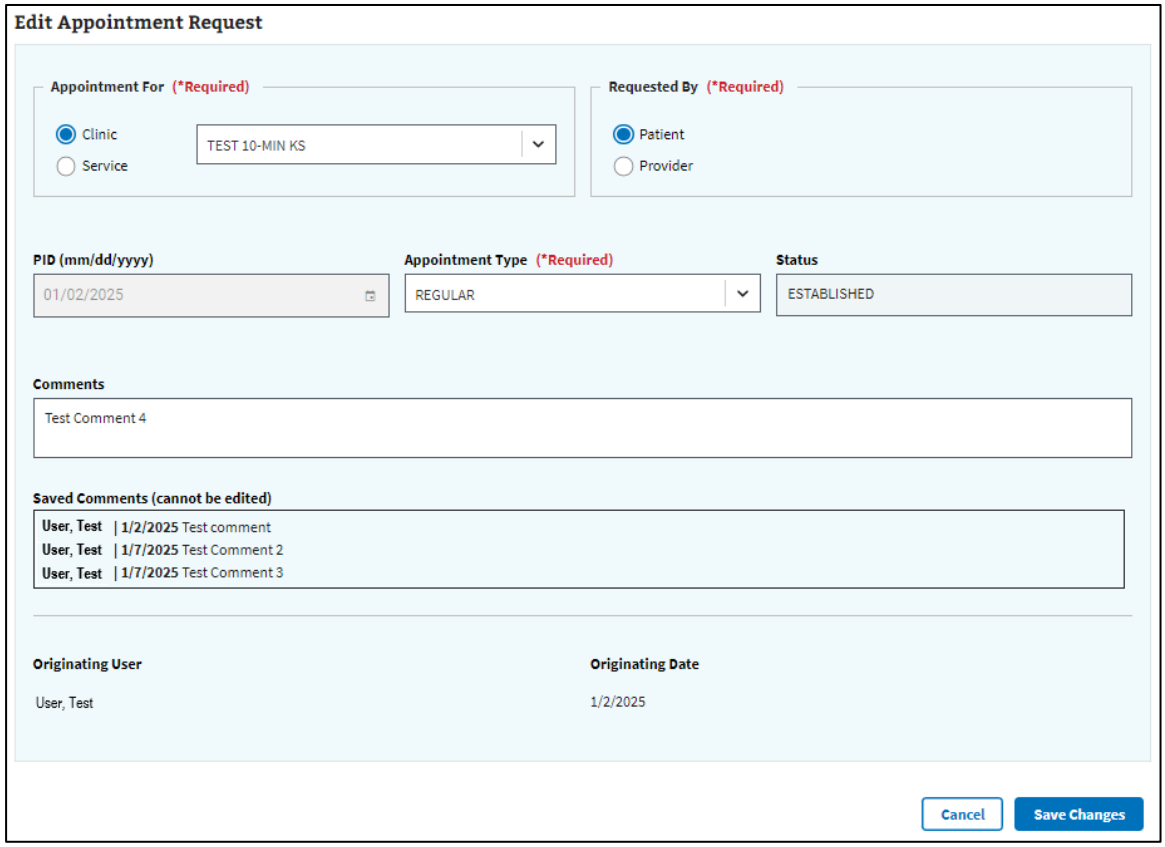


Figure 95: Edit Appointment Request Page

- *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 96** for example).*

4. Once all edits have been made, the user will need to select the "Save Changes" button, seen in **Figure 96**, to save any edits to the request.

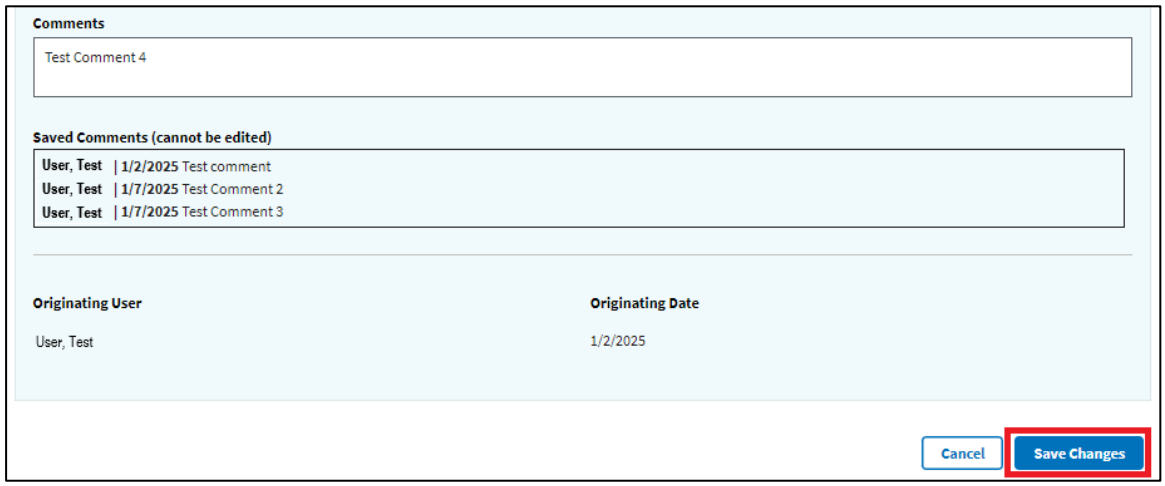


Figure 96: Save Changes Button for Editing Requests

- *Note: The user can also select the "Cancel" button seen in **Figure 96** 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 97**, next to any appointment within the grid.

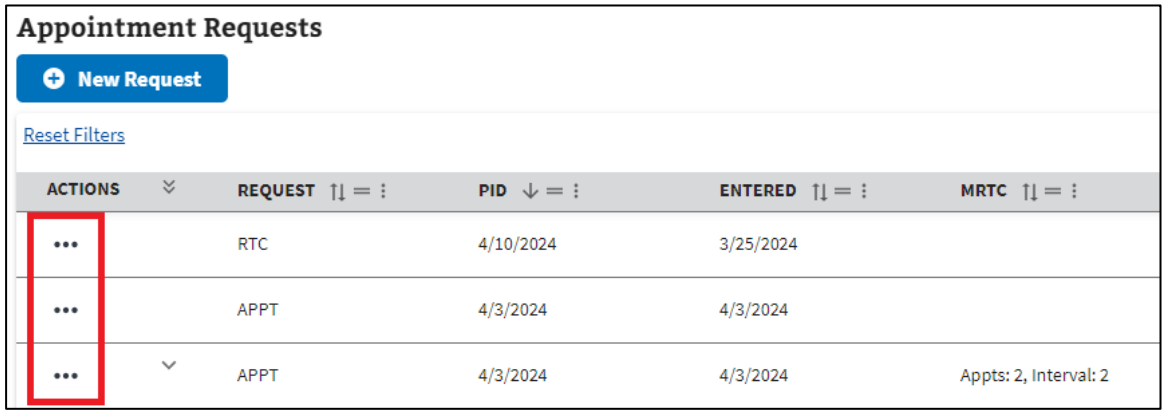


Figure 97: Selecting Action Menu Button to Create Contact Attempts

2. This will cause the action menu to appear. The user will then need to select the "Contact Attempts" option, seen in **Figure 98**.

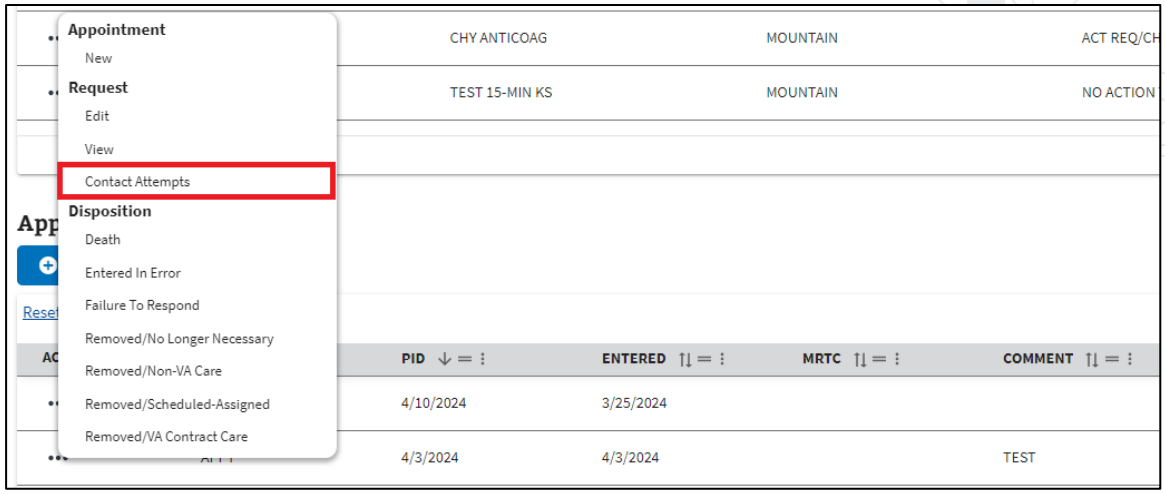


Figure 98: Contact Attempts Option from the Request Actions Dropdown

3. The user will be brought to the Contact Attempts page, shown below in **Figure 99**.

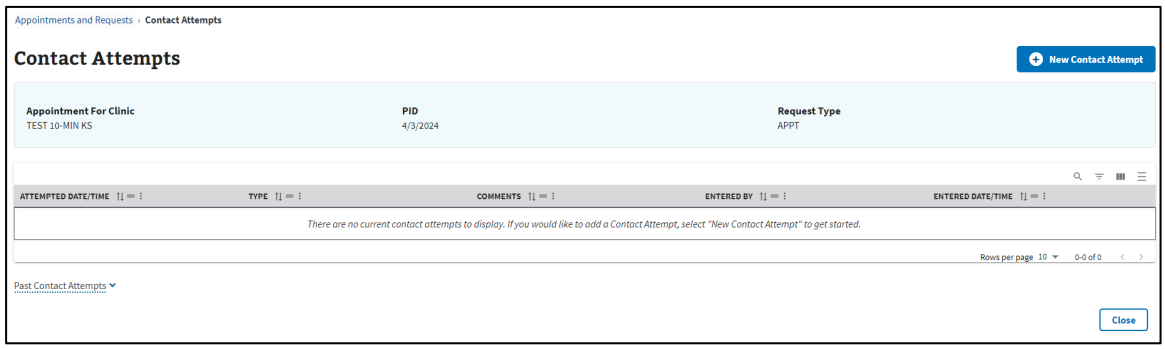


Figure 99: Contact Attempts Page

4. To create a new contact attempt, the user will need to select the “New Contact Attempt” button seen in **Figure 100**.



Figure 100: New Contact Attempt Button

5. The user will be brought to the Create Contact Attempt Page seen in **Figure 101** below. From here, the user will need to fill out the required information displayed and fill out any optional information as needed.

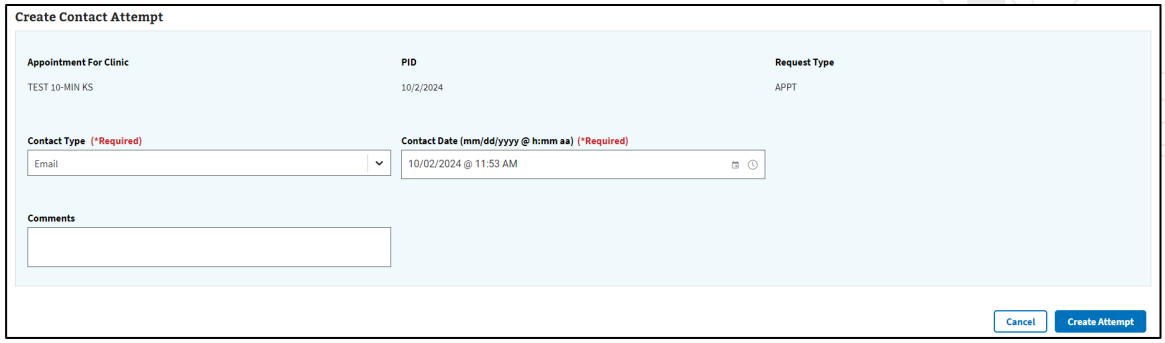


Figure 101: Create Contact Attempt Page

- ❖ *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 102**, to create the contact attempt.

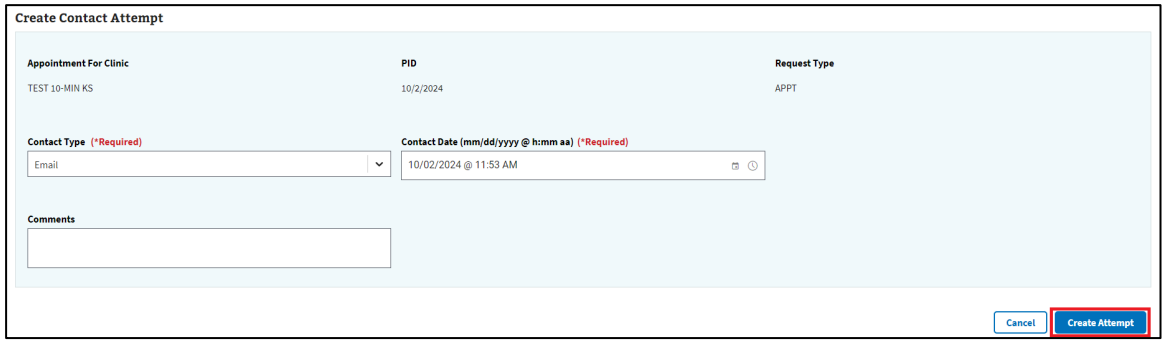


Figure 102: Create Attempt Button

- ❖ *Note: The user can also select the "Cancel" button seen in **Figure 102** 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 103**, will be updated with the newly created contact attempt information.

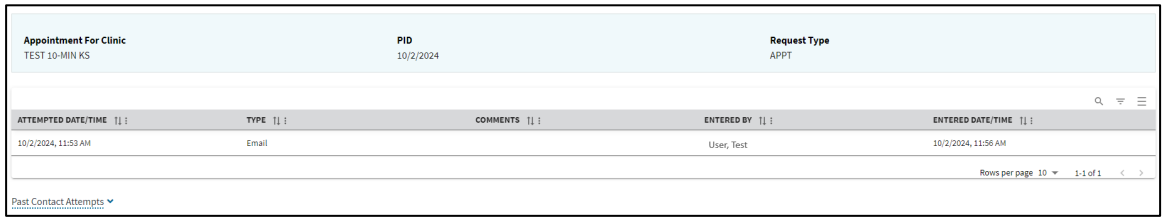


Figure 103: Example of Contact Attempts Grid after Creating Attempt

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 104**, next to any appointment within the grid.

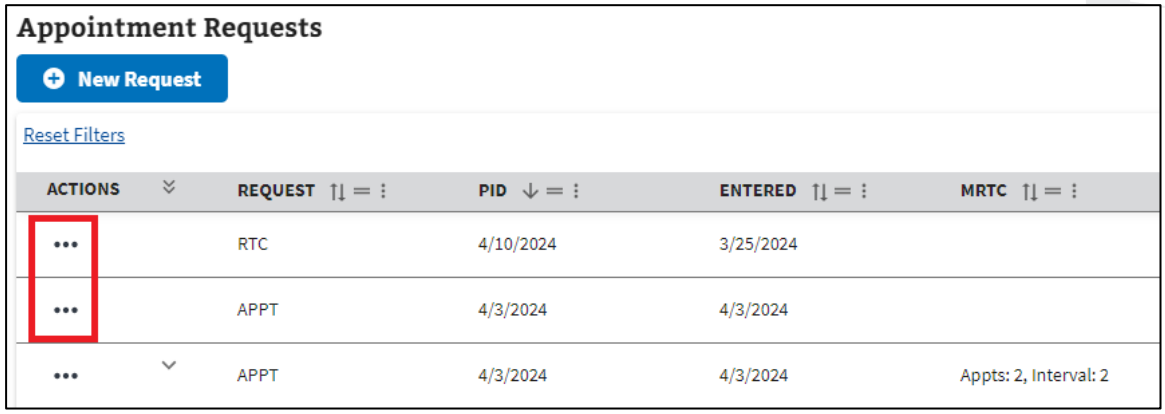


Figure 104: Selecting Action Menu Button to Disposition Requests

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 105**.

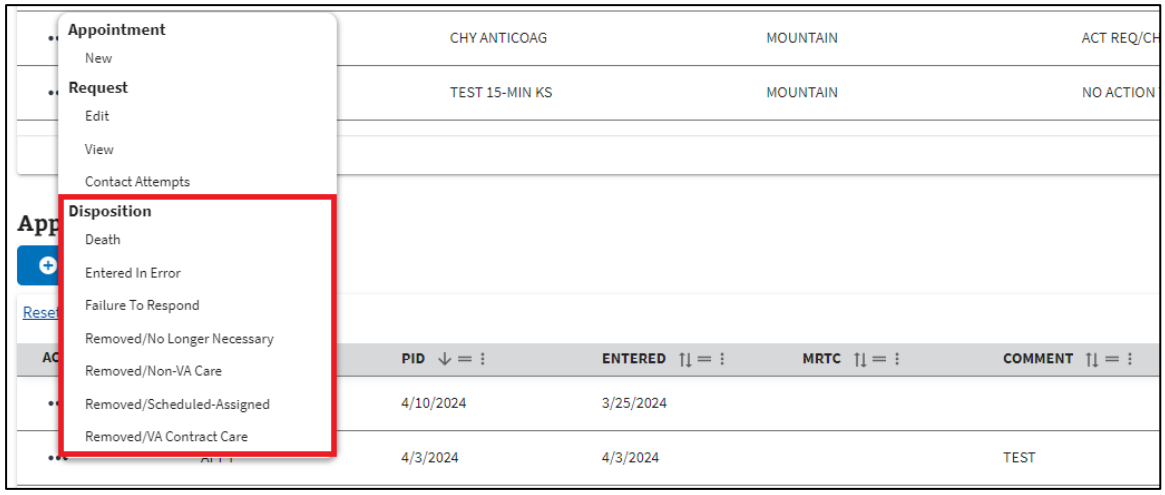


Figure 105: Disposition Options from the Request Actions Dropdown

- *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 106** below.*

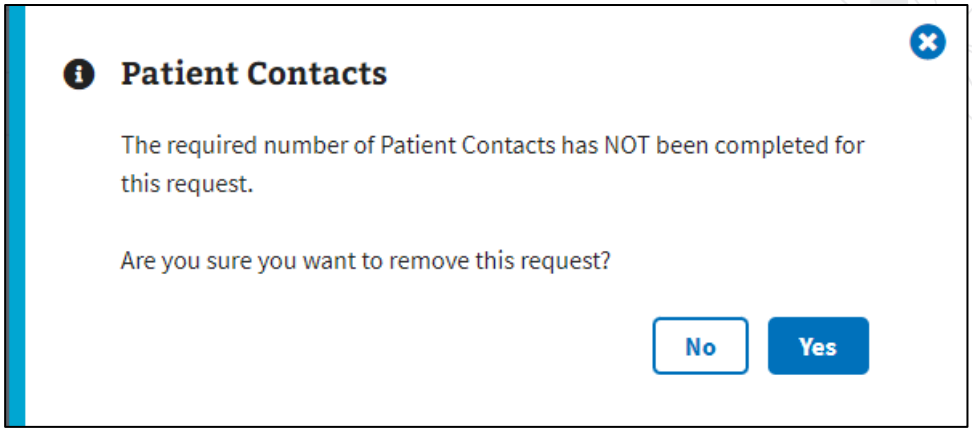


Figure 106: Notification when Dispositioning Failure to Respond without Attempts

3. After selecting a disposition type, the user will need to select the "Disposition" button seen below in **Figure 107** to confirm the request.



Figure 107: Confirm Disposition Request Notification

4. Once the disposition is confirmed, 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 108**, next to any appointment within the grid.

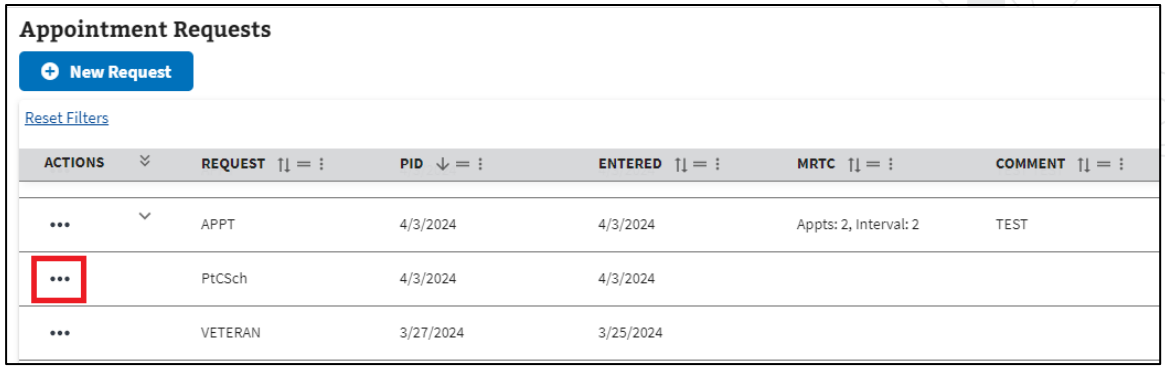


Figure 108: Selecting Action Menu Button to Disposition Requests for PtCSch

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 109**.

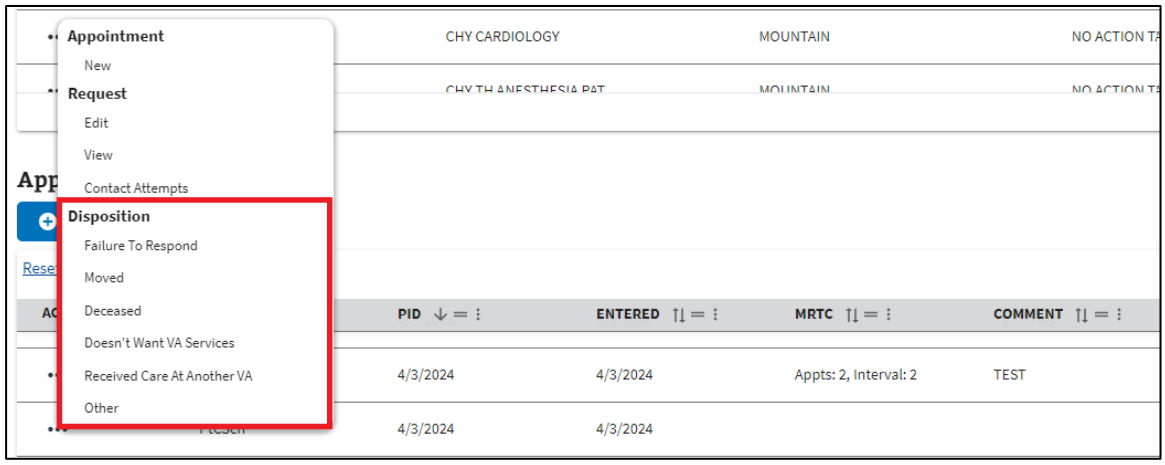


Figure 109: Disposition Options for PtCSch on the Requests Actions Dropdown

- ***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 110 below.***

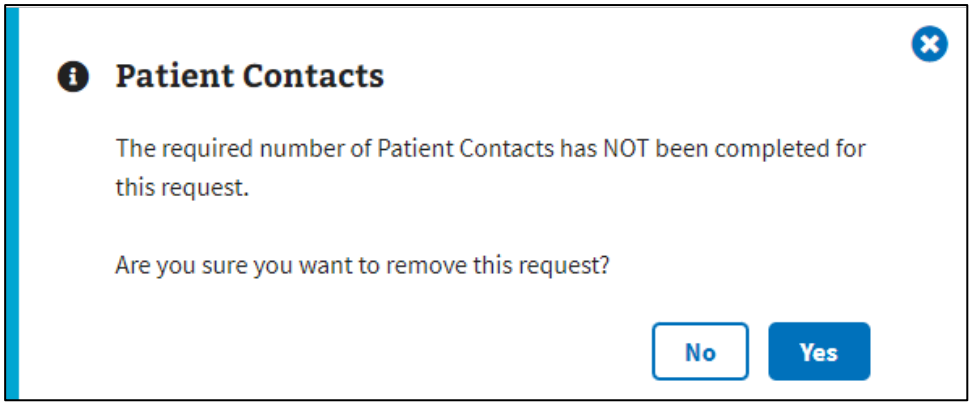


Figure 110: Notification when Dispositioning Failure to Respond without Attempts on PtCSch

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 111**.

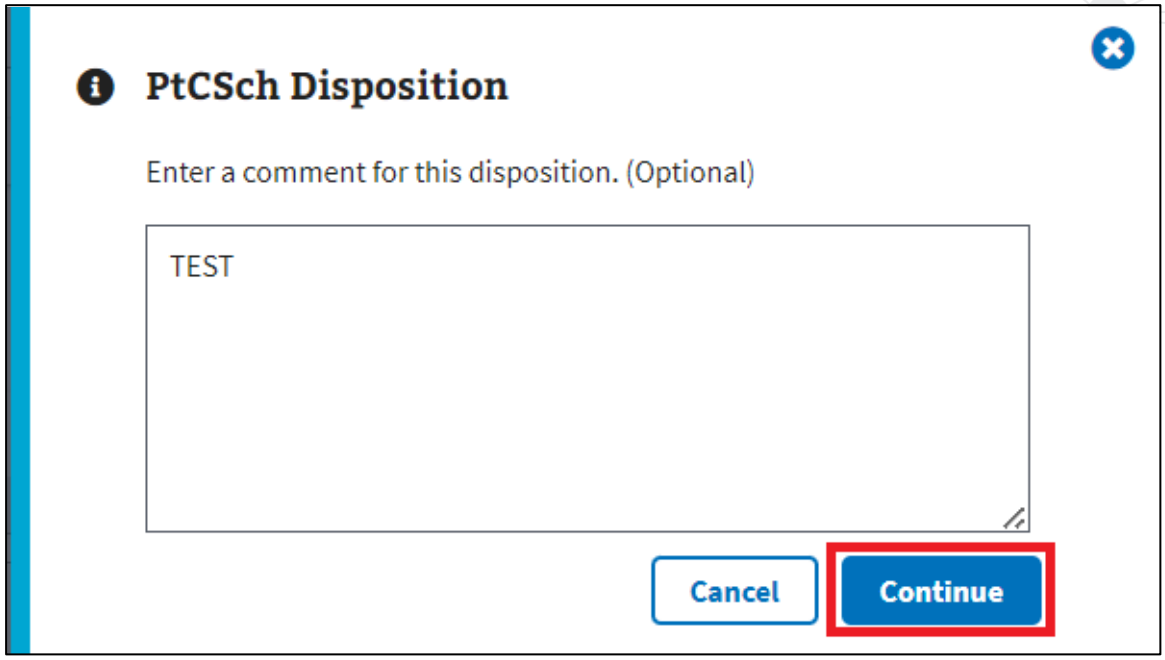


Figure 111: Continue Button for Disposition Comments Window for PtCSch Requests

- ❖ *Note: The user can also select the "Cancel" button or the "x" button, seen in **Figure 111**, 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 112**, next to the parent request within the grid.

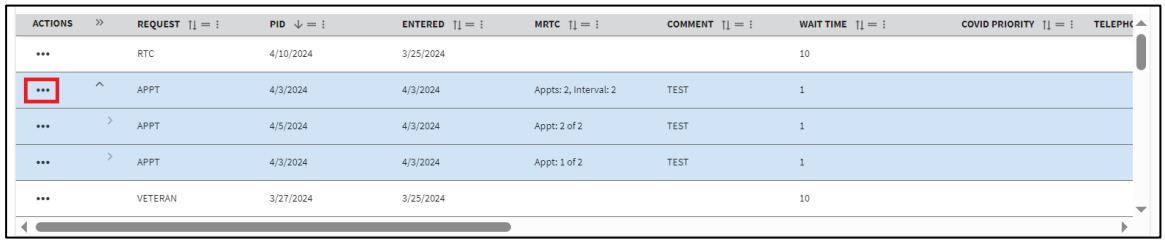


Figure 112: Selecting Action Menu Button to Disposition for MRTC Parent Requests

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 113**.

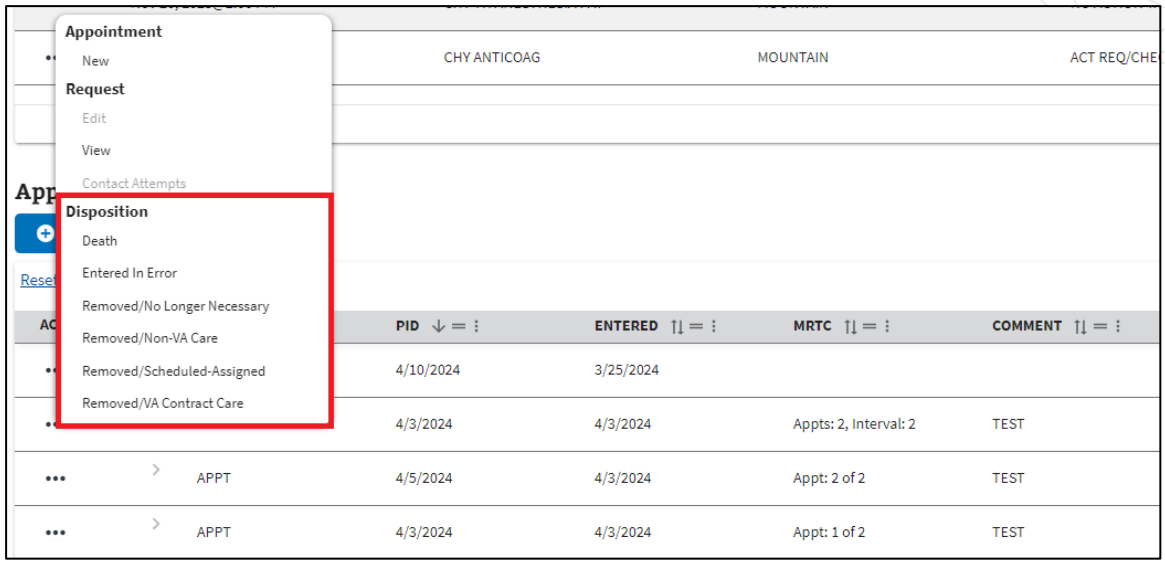


Figure 113: Disposition Options for MRTC Parent Request on the Actions Dropdown

- *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 114** below.*

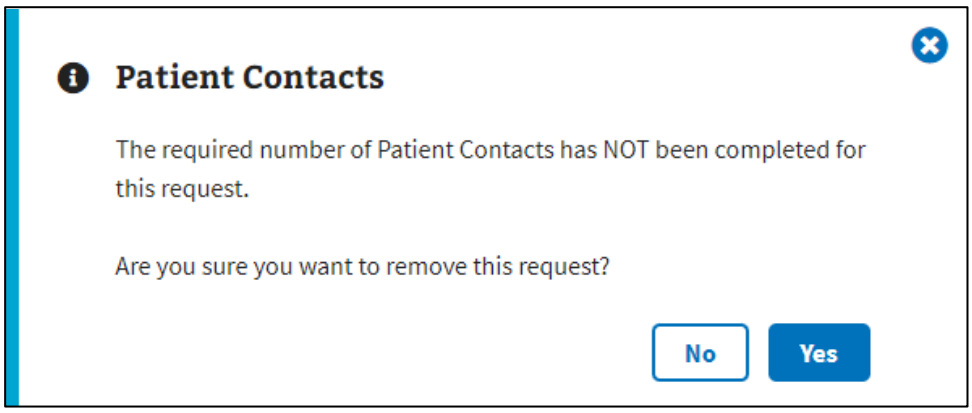


Figure 114: Notification when Dispositioning Failure to Respond without Attempts on MRTC Parent Requests

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 115**, to finish the disposition.

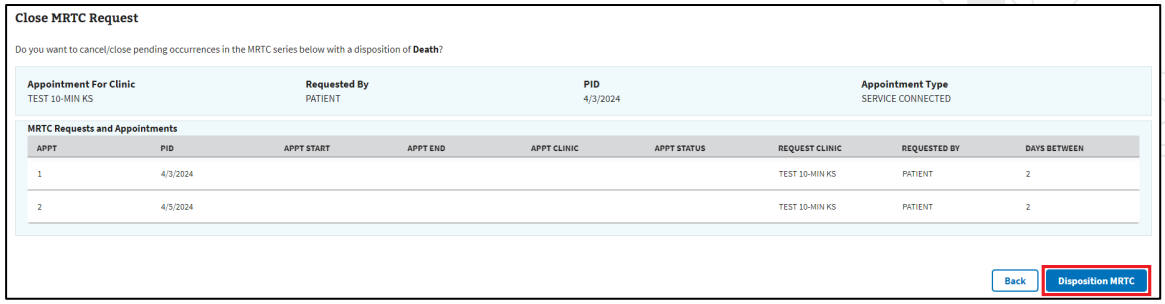


Figure 115: Disposition MRTC Button for Parent Requests

- *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 116**, before continuing. The user will have the option to preview a cancellation letter, if needed.*

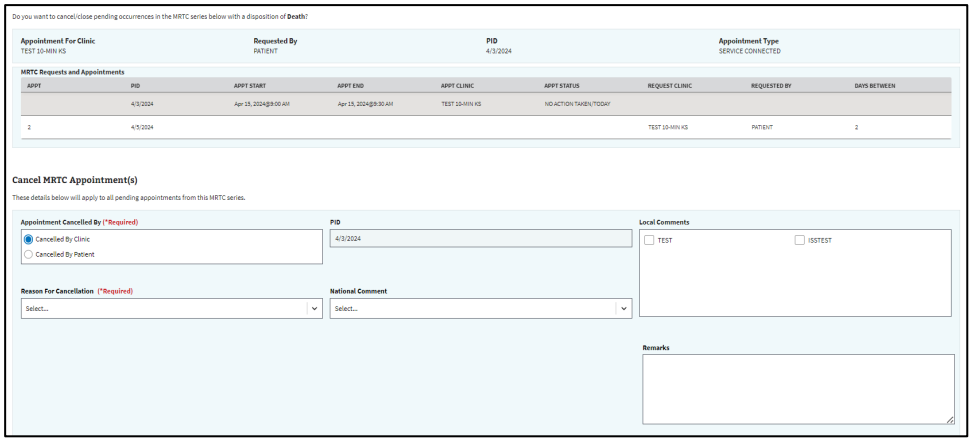


Figure 116: Cancel MRTC Section Example when Dispositioning Parent Request

- *Note: The user can also select the "Back" button seen in **Figure 115** 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 117** below.

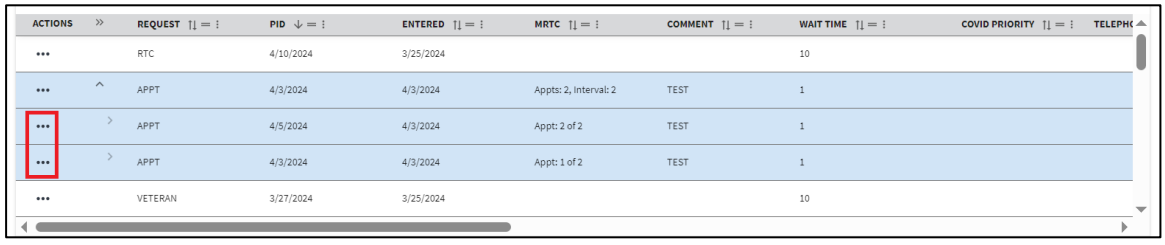


Figure 117: Selecting Action Menu Button to Disposition for MRTC Child Requests

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 118**.

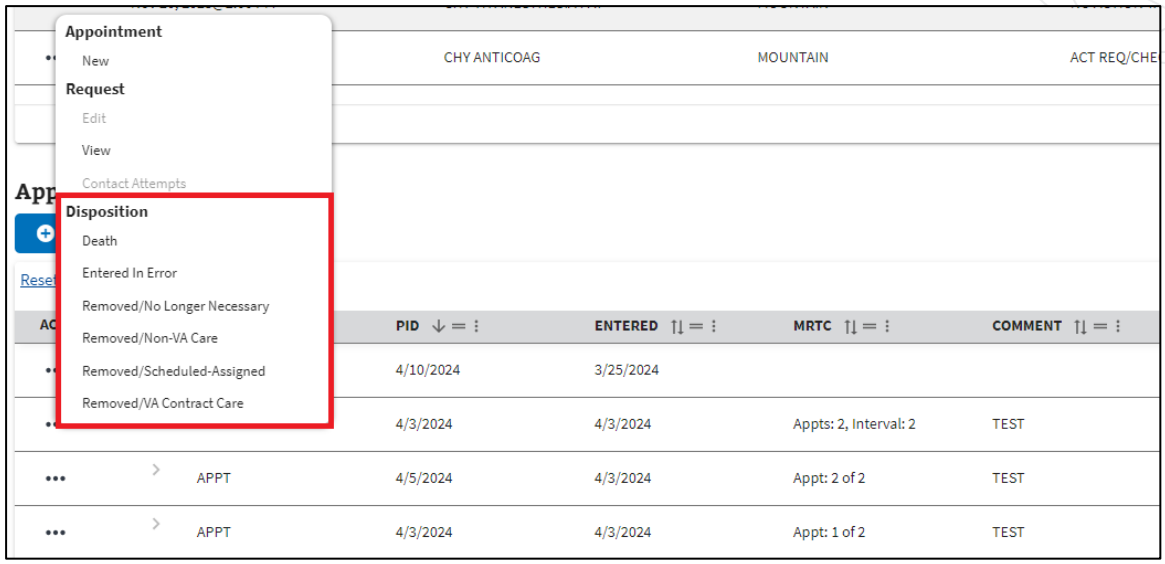


Figure 118: Disposition Options for MRTC Child Requests on the Actions Dropdown

- *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 119** below.*

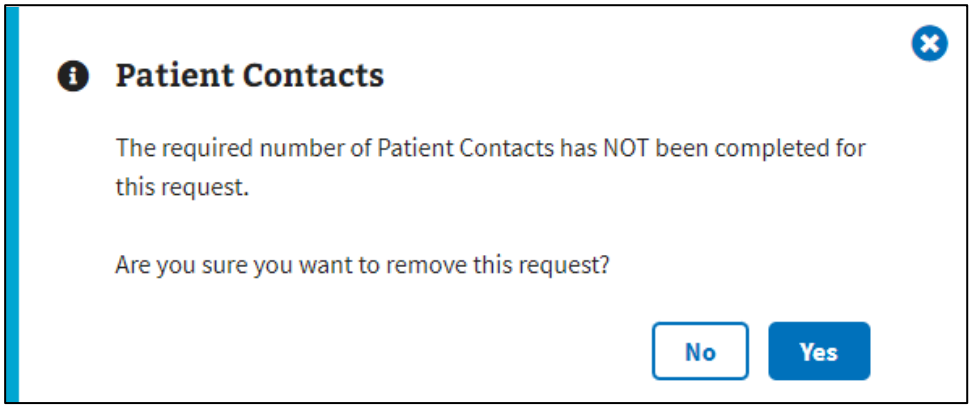


Figure 119: Notification when Dispositioning Failure to Respond without Attempts on MRTC Child Requests

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 120**, to finish the disposition.

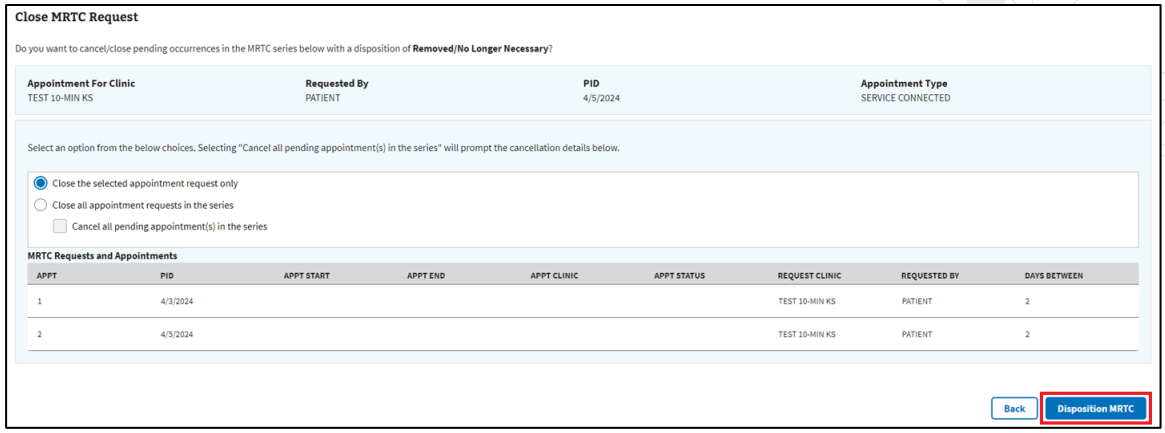


Figure 120: Disposition MRTC Button for MRTC Child Requests

- *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 121**, before continuing. The user will have the option to preview a cancellation letter, if needed.*

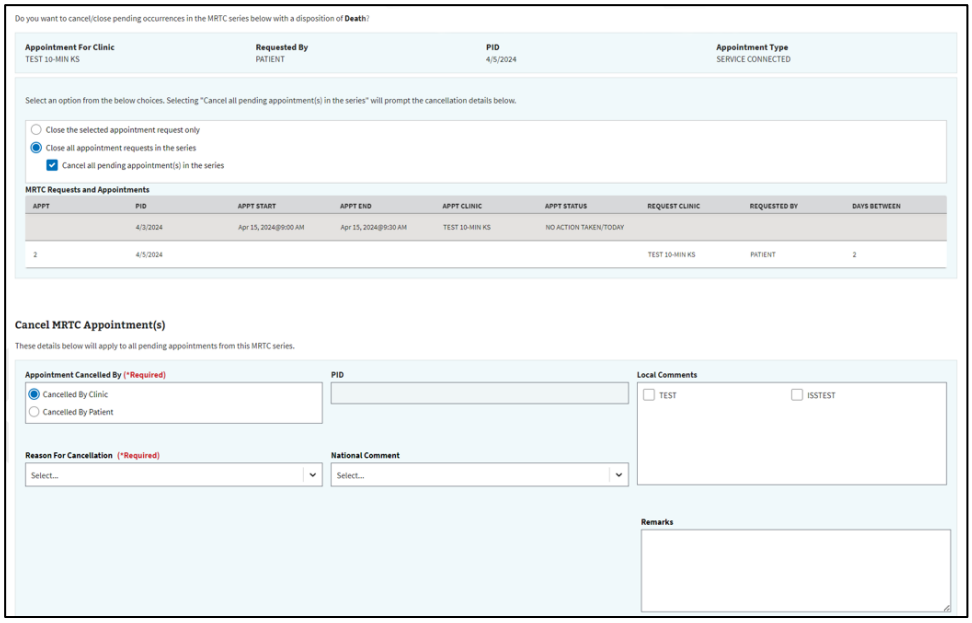


Figure 121: Cancel MRTC Section Example when Dispositioning Child Requests

- *Note: The user can also select the "Back" button seen in **Figure 120** 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 122**, next to the request within the grid.

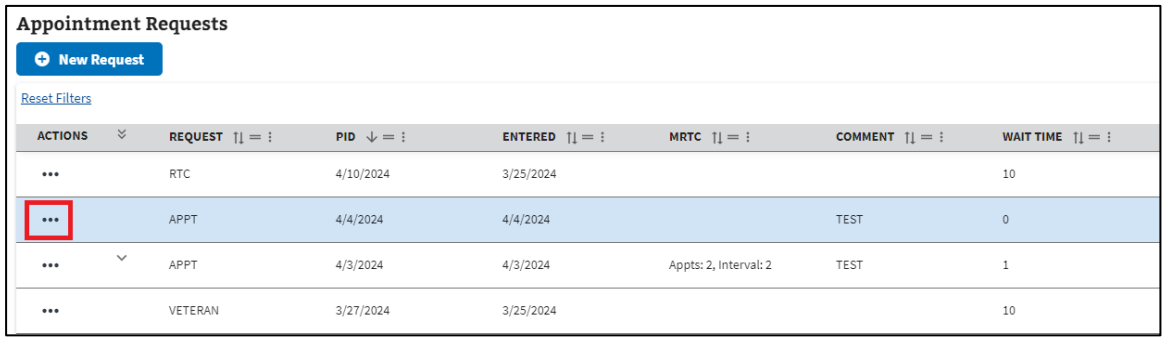


Figure 122: Selecting Action Menu Button to Create APPT Appointment

3. This will cause the action menu to appear. The user will then need to select the "New" option, seen in **Figure 123**.

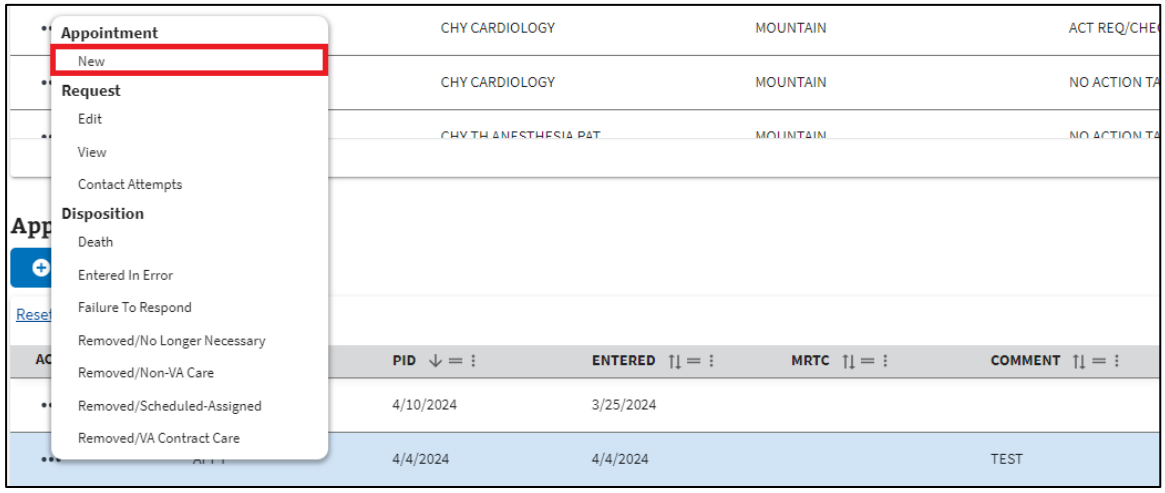


Figure 123: New Option from the Request Actions Dropdown for APPT

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 124**.

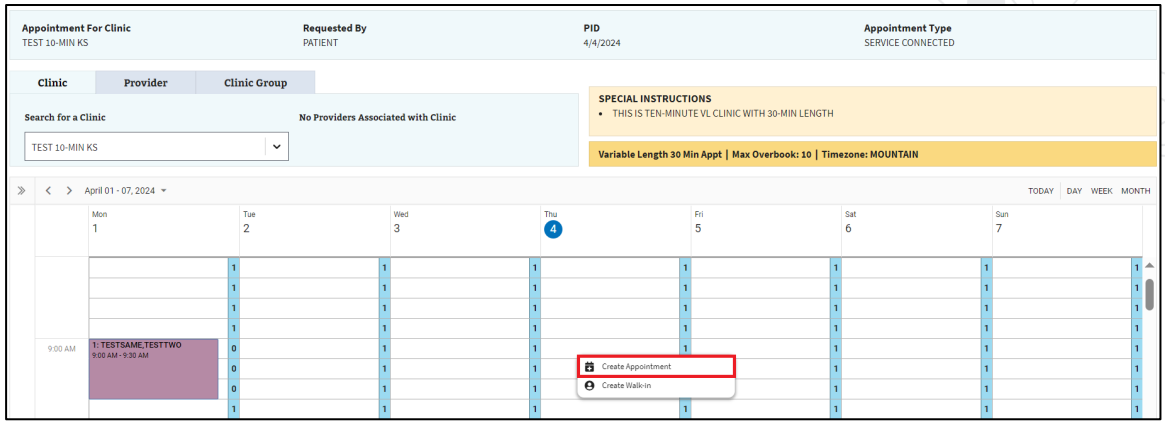


Figure 124: Create Appointment Button for APPT

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 125**. The user can also fill out any optional information as needed.

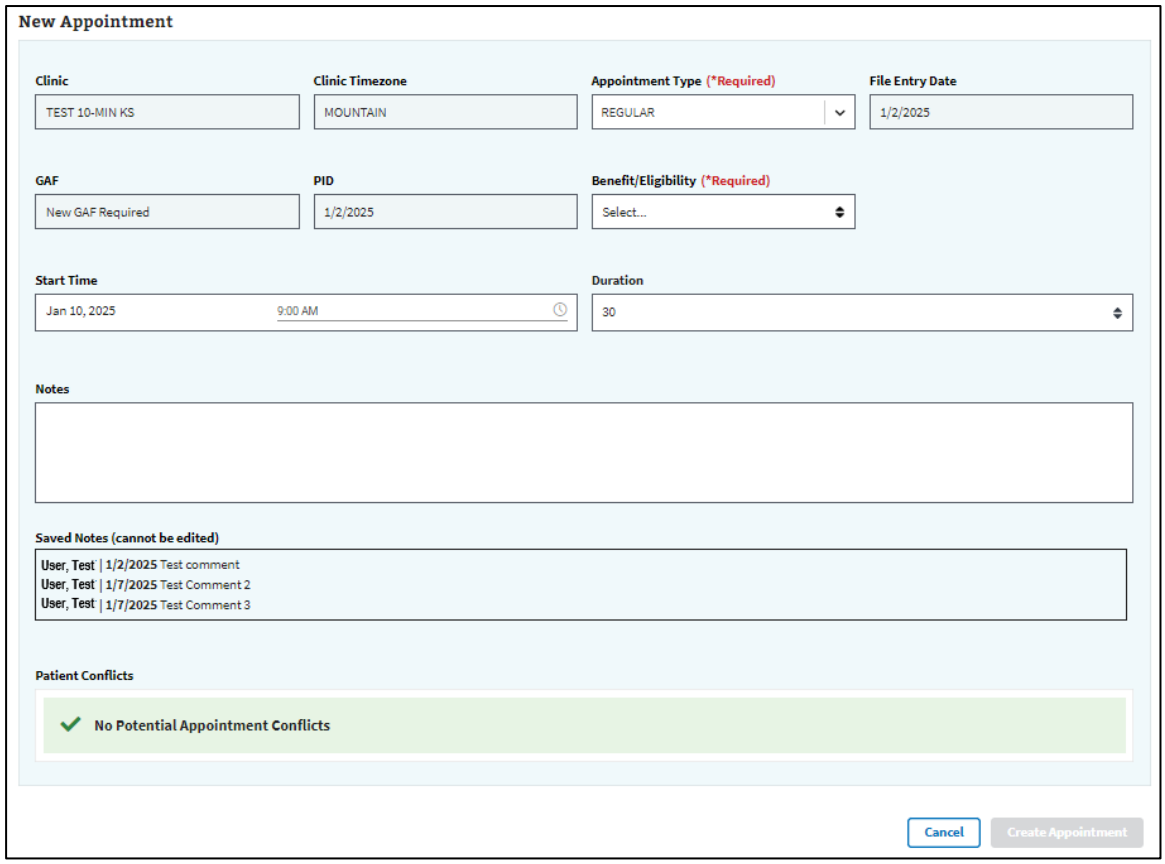


Figure 125: New Appointment Page for APPT

- *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. Comments added under the 'Notes" section of the page will be added to comment tracking and available for viewing once the appointment has been created.*

6. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 126**, to create the new APPT appointment.

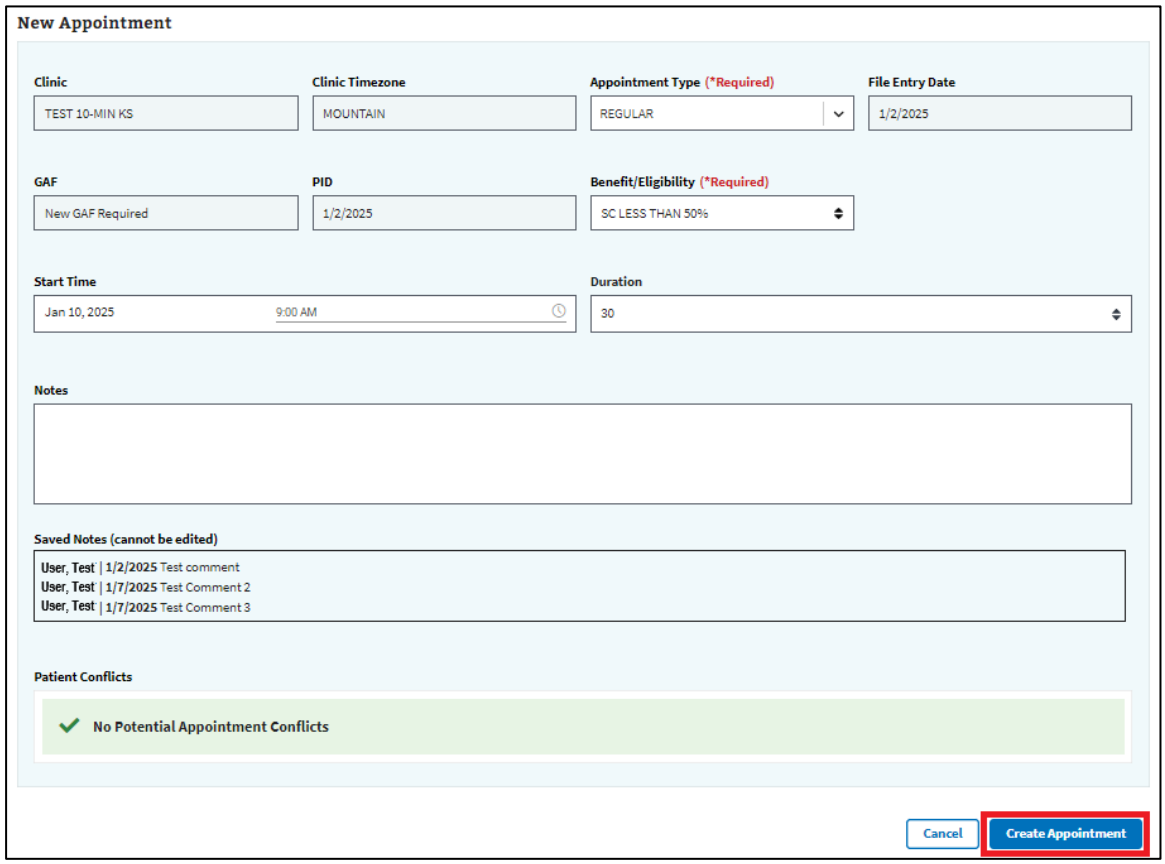


Figure 126: Create Appointment Button for New APPT

- *Note: The user can also select the "Cancel" button seen in **Figure 126** to exit creating an appointment and go back to the Appointments & Requests page.*

7. The Appointment Successfully Created window, shown below in **Figure 127**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

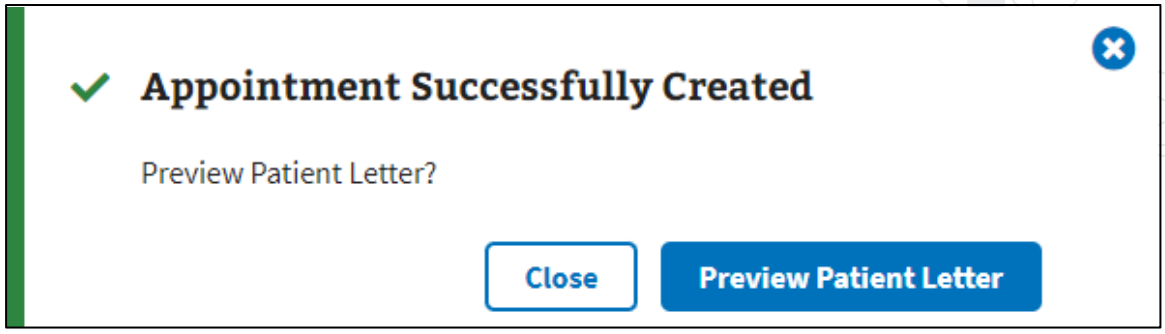


Figure 127: Preview Patient Letter Window for Creating APPT Appointment

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 128**, next to the request within the grid.

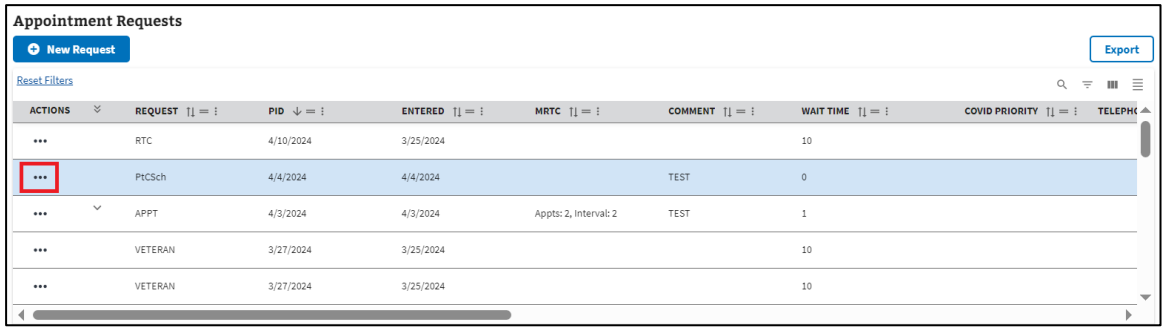


Figure 128: Selecting Action Menu Button to Create PtCSch Appointment

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

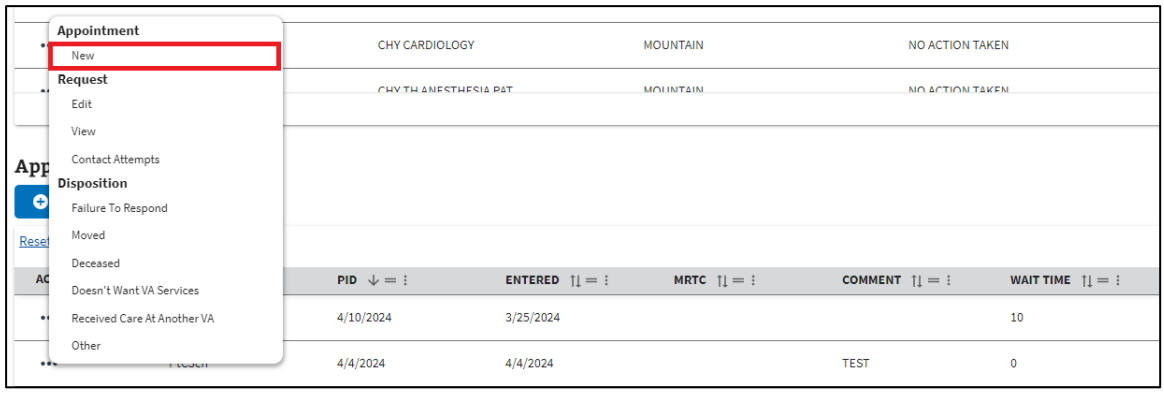


Figure 129: New Option from the Request Actions Dropdown for PtCSch

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 130**.

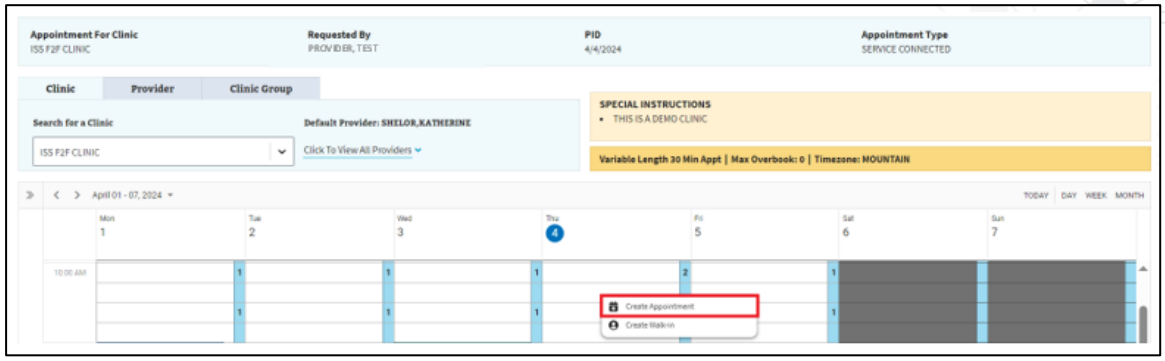


Figure 130: Create Appointment Button for PtCSch

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 131**. The user can also fill out any optional information as needed.

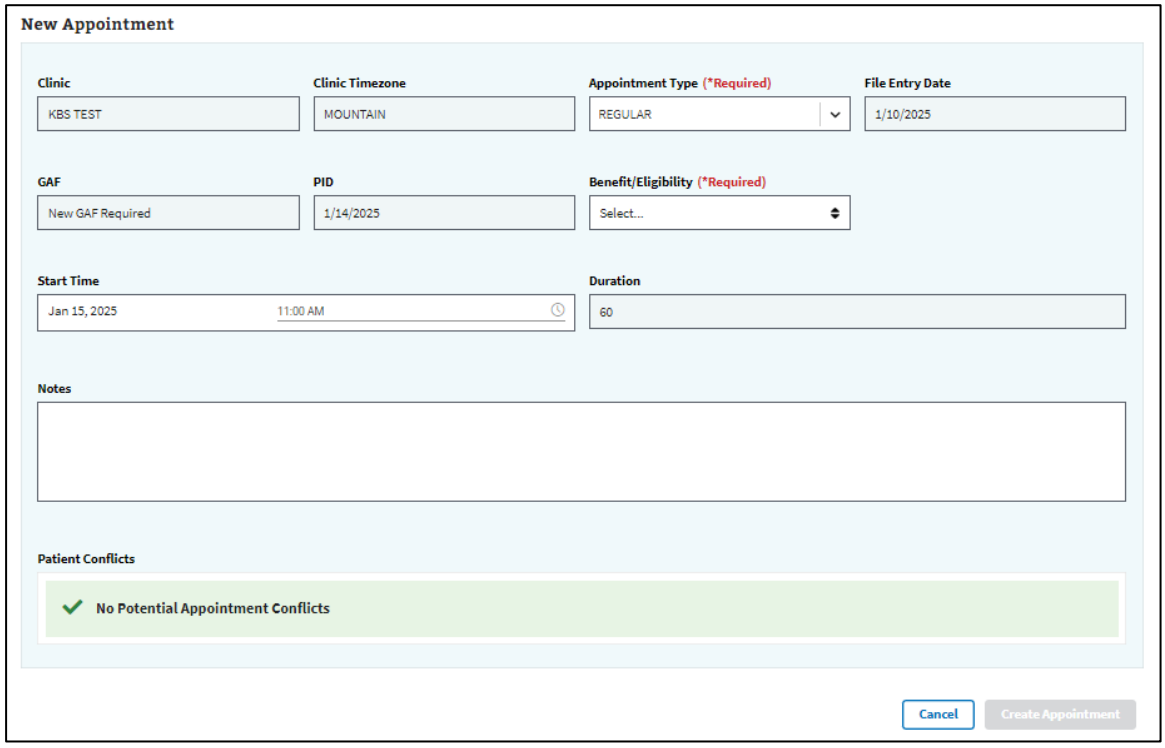


Figure 131: New Appointment Page for PtCSch

- *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. Comments added under the 'Notes" section of the page will be added to comment tracking and available for viewing once the appointment has been created.*

6. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 132**, to create the new PtCSch appointment.

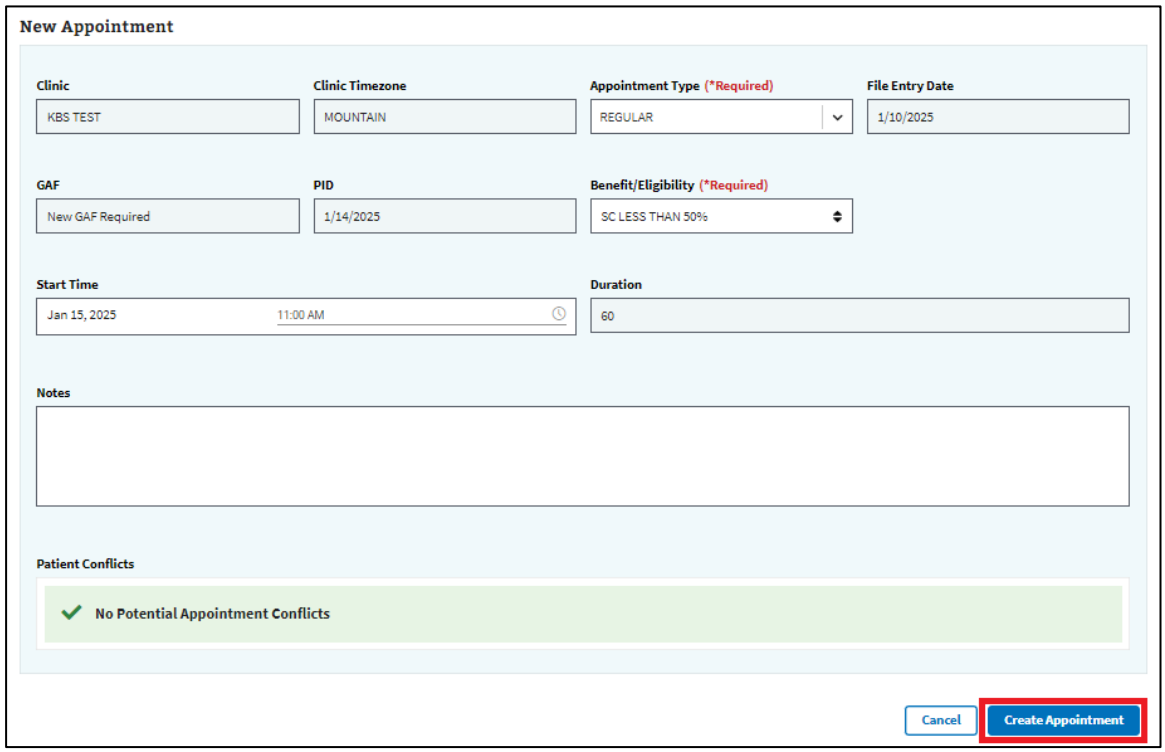


Figure 132: Create Appointment Button for New PtCSch

- *Note: The user can also select the "Cancel" button seen in **Figure 132** to exit creating an appointment and go back to the Appointments & Requests page.*

7. The Appointment Successfully Created window, shown below in **Figure 133**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

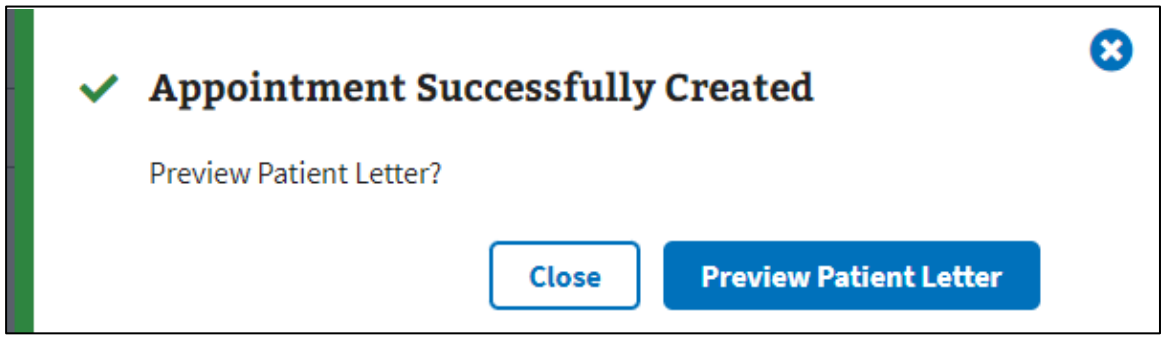


Figure 133: Preview Patient Letter Window for Creating PtCSch Appointment

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 134**, or follow the steps in **4.1.3 MRTC** to create a request through ISS.

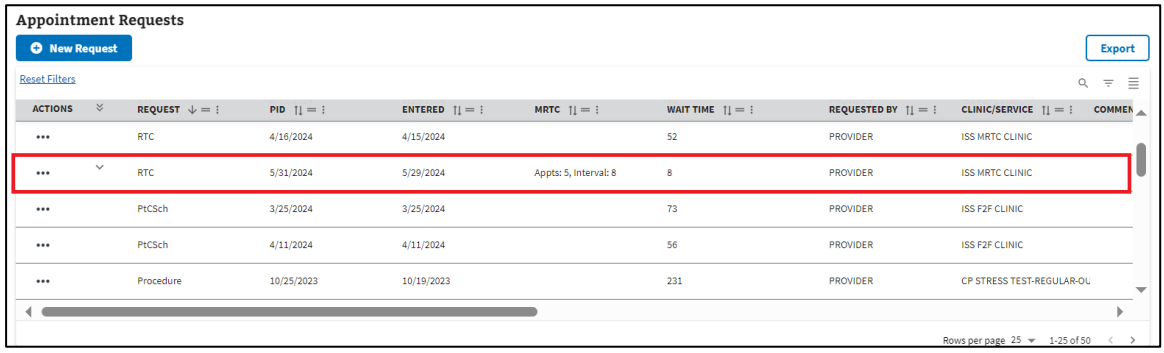


Figure 134: Example of CPRS MRTC in Grid

- ***Note: MRTC requests created through CPRS will display as "RTC" in the Request column.***
- ***Note: MRTC requests without an existing parent request will display in red as seen below in Figure 135.***

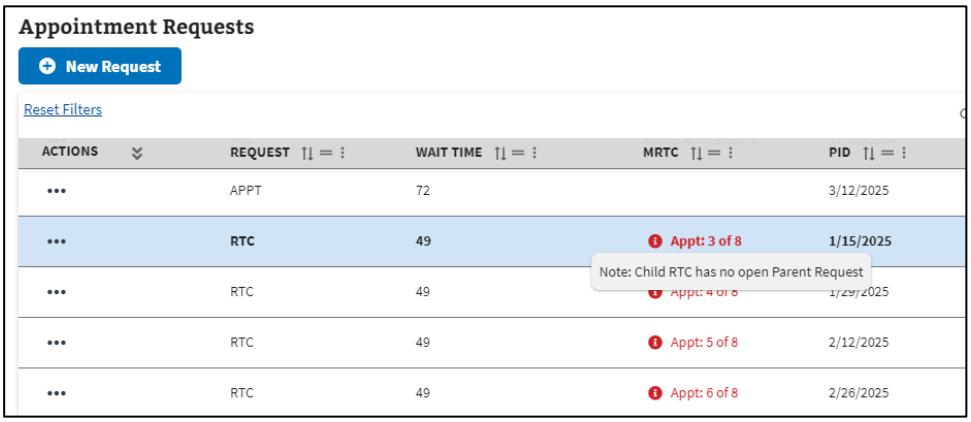


Figure 135: Orphaned MRTC Child Request Example

2. After creating the appointment request, the user will select the ellipsis, seen in **Figure 136**, next to the request within the grid.

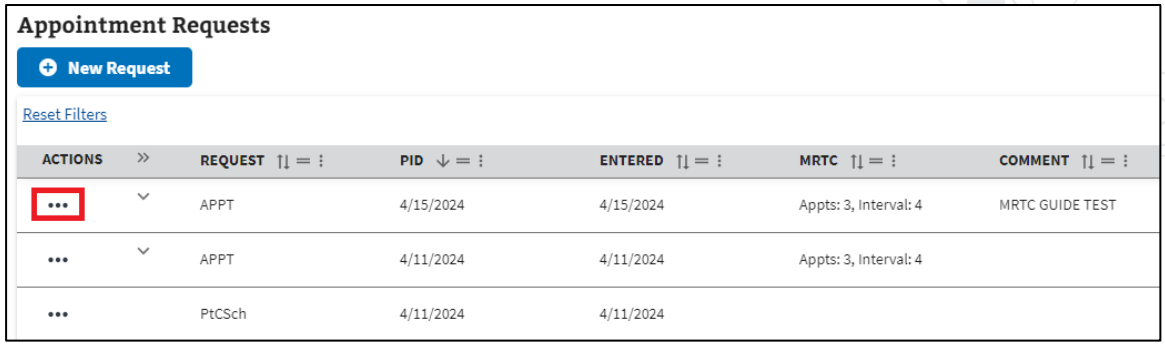


Figure 136: Selecting Action Menu Button to Create MRTC Appointment

- ❖ *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 137**.

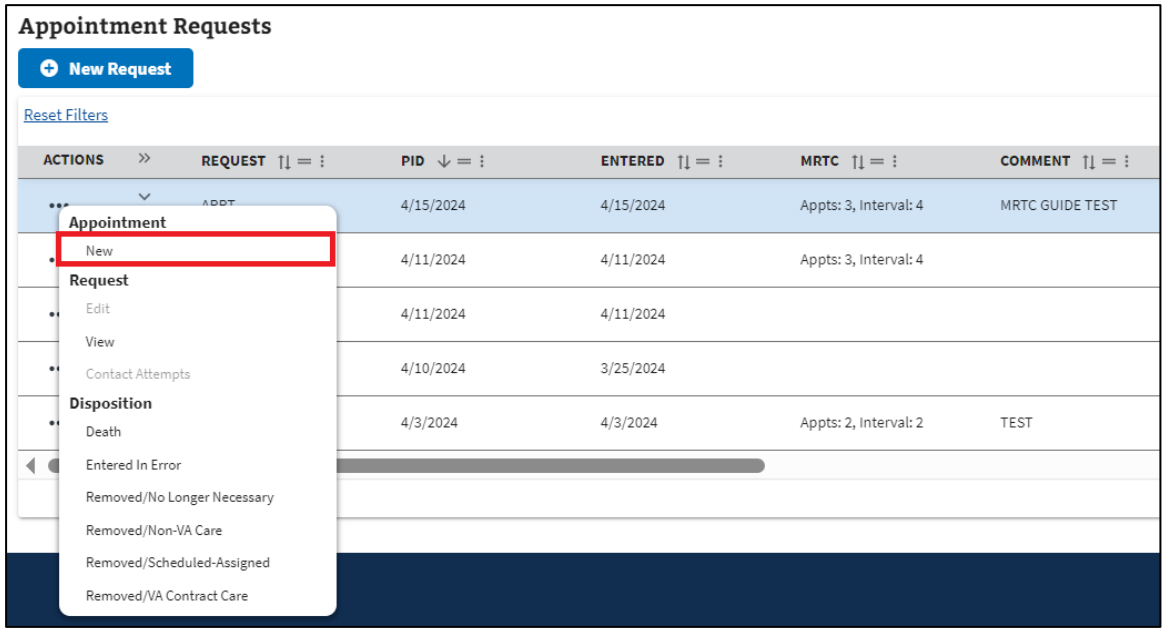


Figure 137: New Option from the Request Actions Dropdown for MRTC

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 138**.

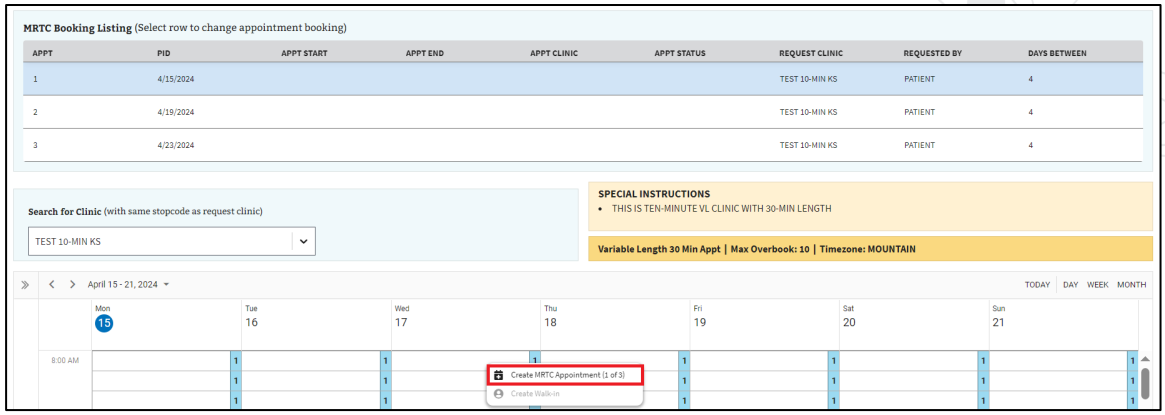


Figure 138: Create Appointment Button for MRTC

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 139**. The user can also fill out any optional information as needed.

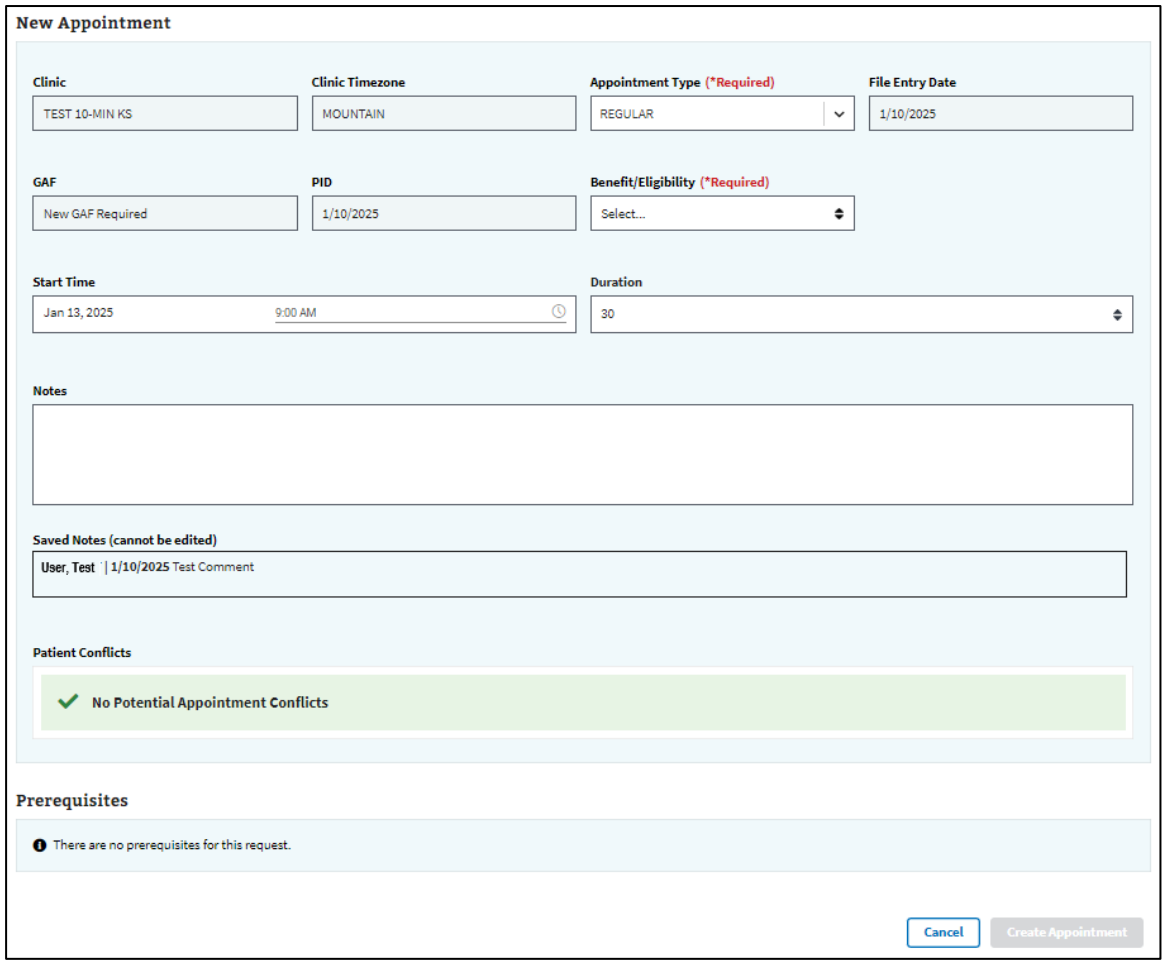


Figure 139: New Appointment Page for MRTC

- *Note: When creating an MRTC Appointment, the user may see prerequisites attached to the request, as seen below in **Figure 140**.*



Figure 140: 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. Comments added under the 'Notes" section of the page will be added to comment tracking and available for viewing once the appointment has been created.*

6. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 141**, to create the new MRTC appointment.

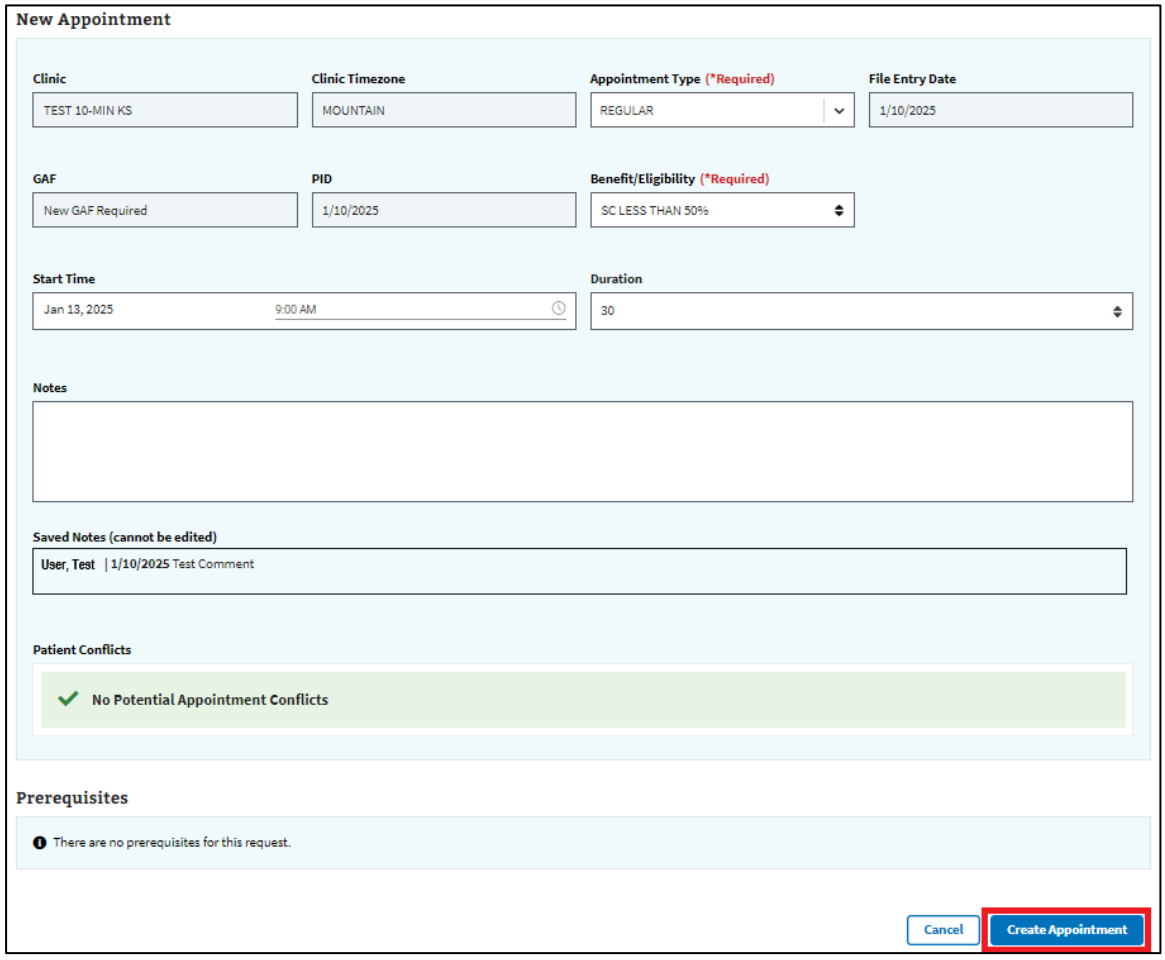


Figure 141: Create Appointment Button for New MRTC

- *Note: The user can also select the "Cancel" button seen in **Figure 141** to exit creating an appointment and go back to the Appointments & Requests page.*

7. The Appointment Successfully Created window, shown below in **Figure 142**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

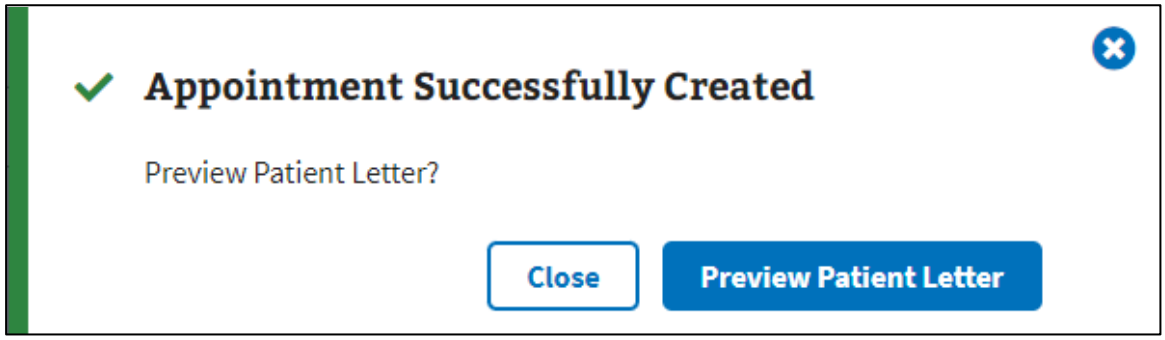


Figure 142: Preview Patient Letter Window for Creating MRTC Appointments

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 143** for an example.)

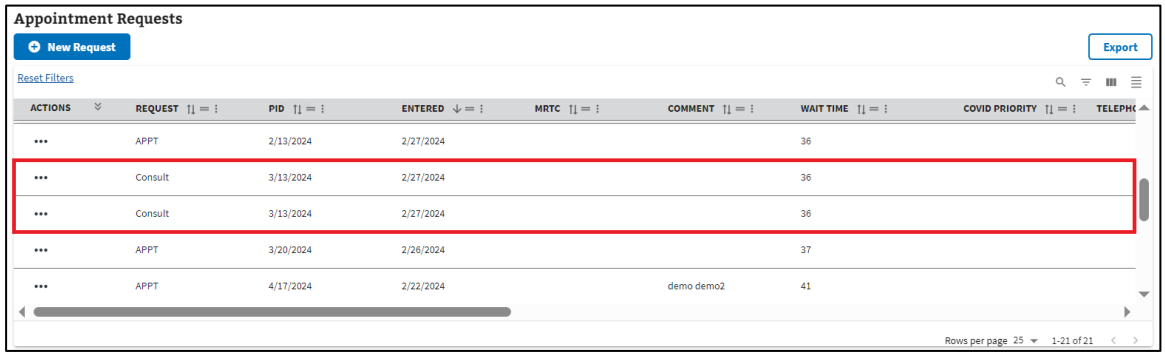


Figure 143: Example for Finding Consult/Procedure Requests

2. Once the consult/procedure request is located, the user will select the ellipsis, seen in **Figure 144**, next to the request within the grid.

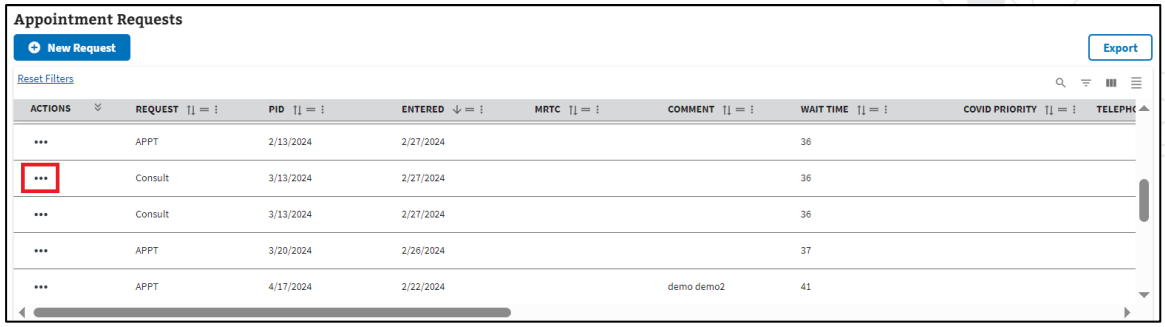


Figure 144: Selecting Action Menu Button to Create Consult/Procedure Appointment

3. This will cause the action menu to appear. The user will then need to select the "New" option, seen in **Figure 145**.

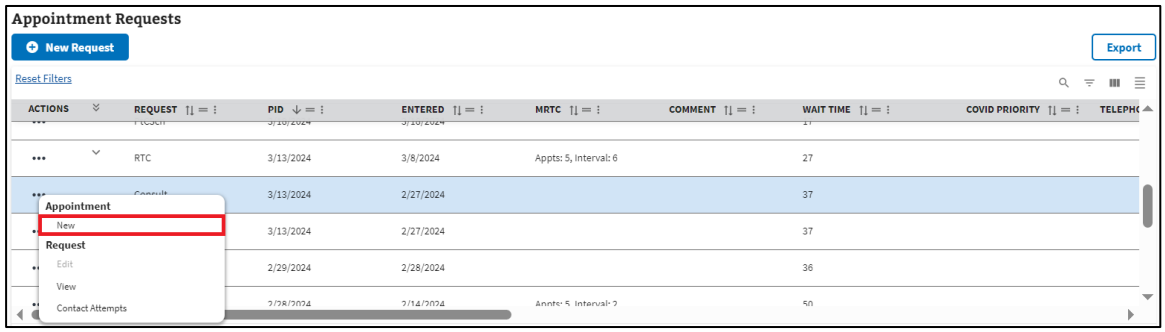


Figure 145: New Option from the Request Actions Dropdown for Consult/Procedure

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 146**, and enter a valid clinic name. Once the information has been entered, a list of clinics will appear in the dropdown.

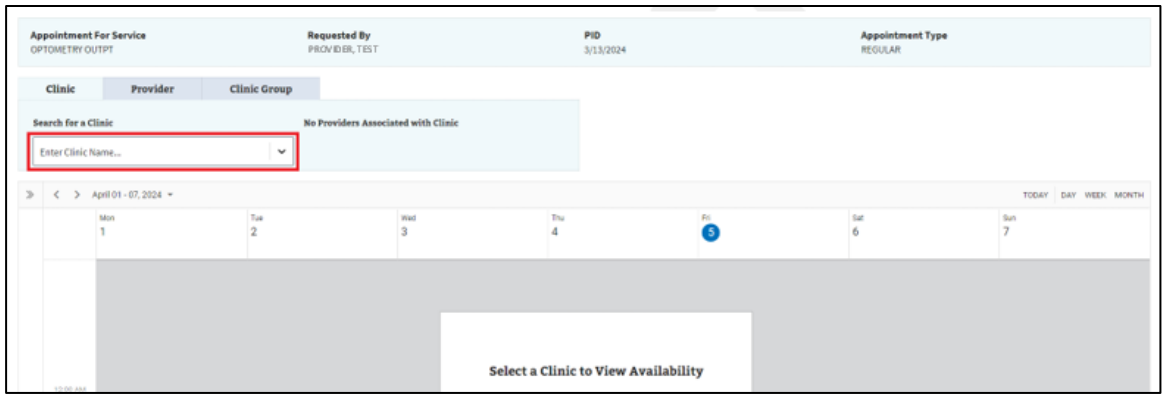


Figure 146: Searching for a Clinic when Creating a Consult/Procedure Appointment

- *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 147** below.*

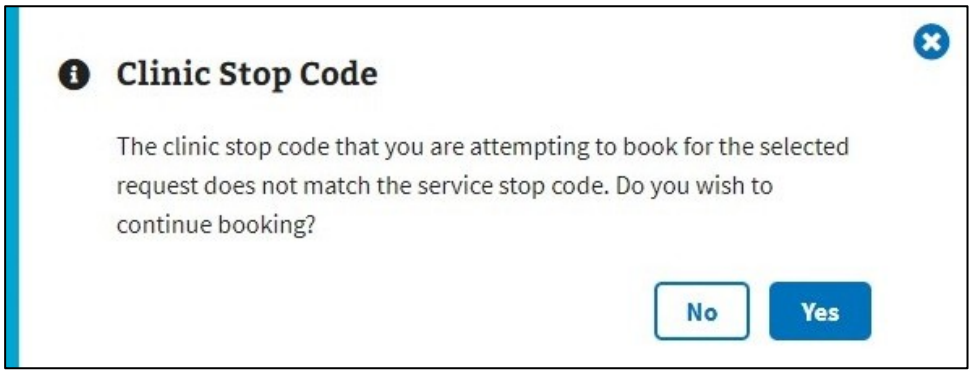


Figure 147: Clinic Stop Code Window for Consult/Procedure

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 148**.

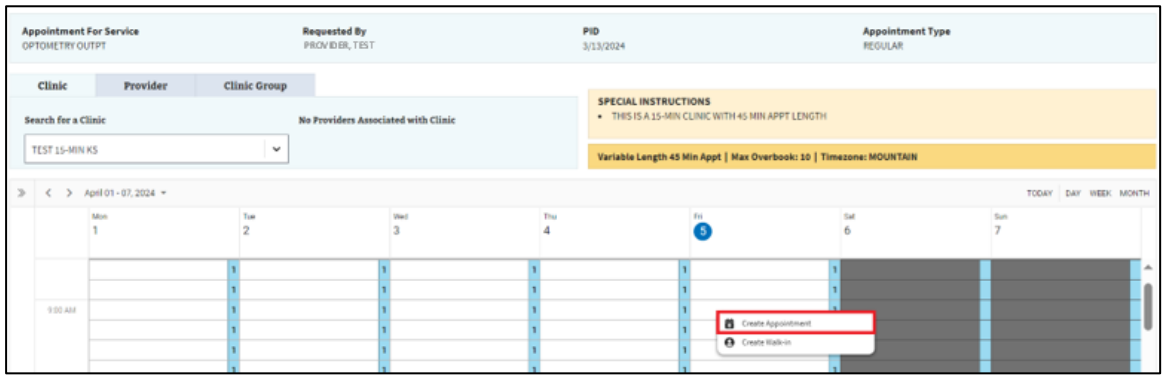


Figure 148: Create Appointment Button for Consult/Procedure

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 149**. The user can also fill out any optional information as needed.

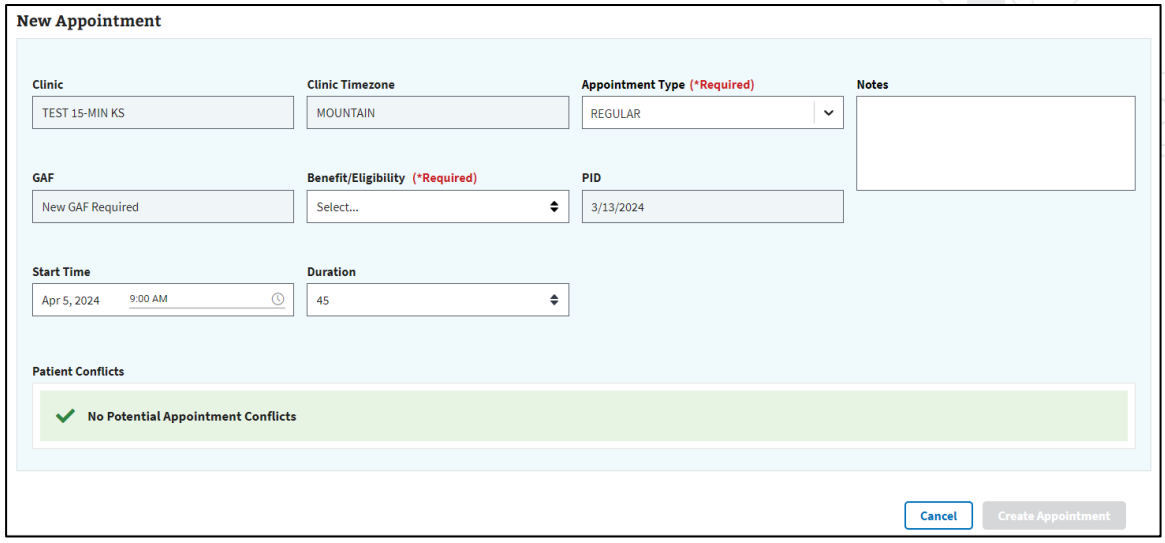


Figure 149: New Appointment Page for Consult/Procedure

- ❖ *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. Comments added under the 'Notes" section of the page will be added to comment tracking and available for viewing once the appointment has been created.*

7. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 150**, to create the new Consult/Procedure appointment.

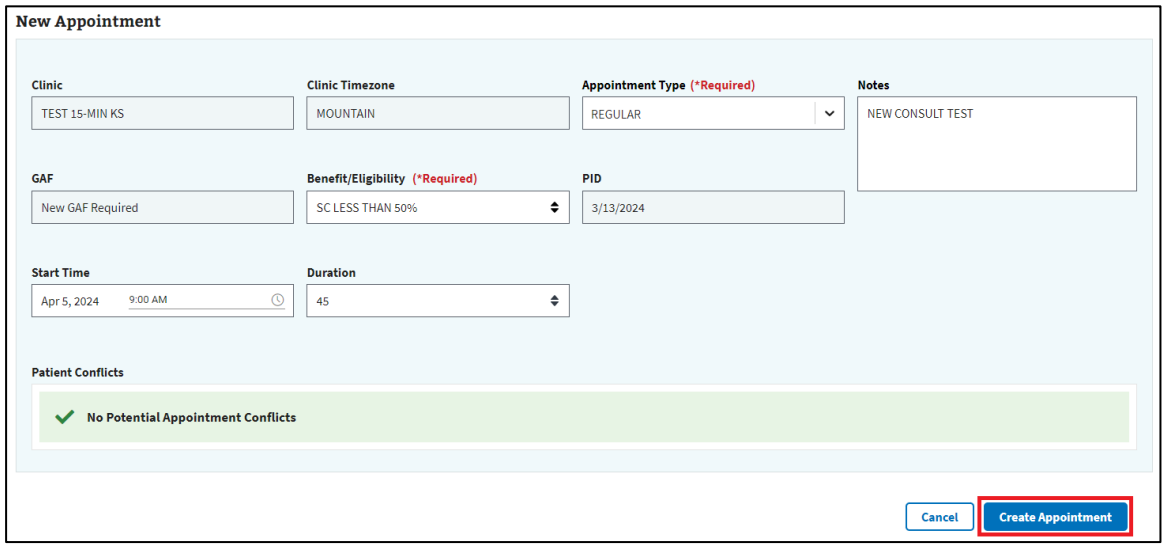


Figure 150: Create Appointment Button for New Consult/Procedure

- ❖ *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.*

8. 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.

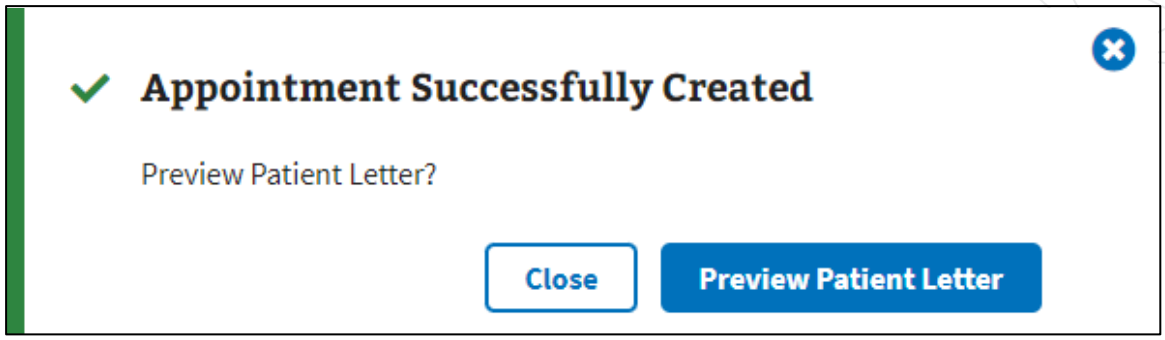


Figure 151: Preview Patient Letter Window for Creating Consult/Procedure Appointment

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 152** for an example.)

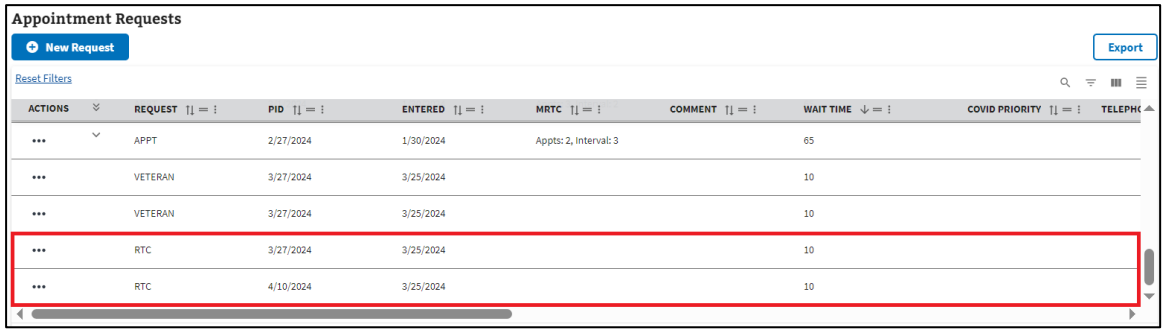


Figure 152: Example for Finding RTC Requests

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

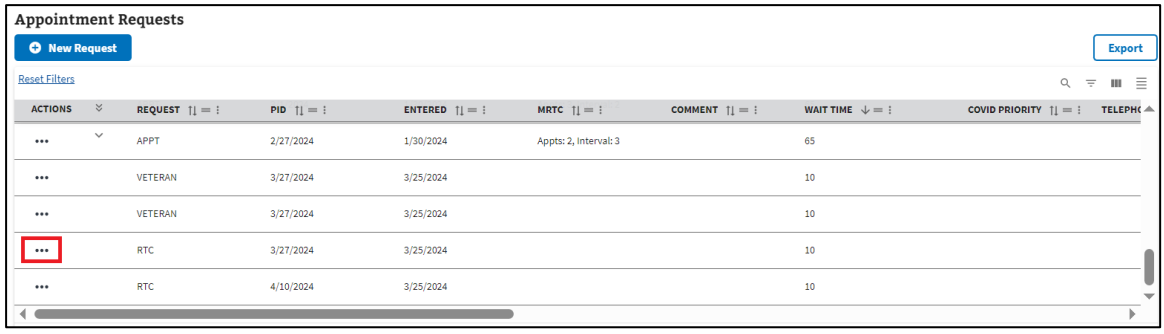


Figure 153: Selecting Action Menu Button to RTC Appointments

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

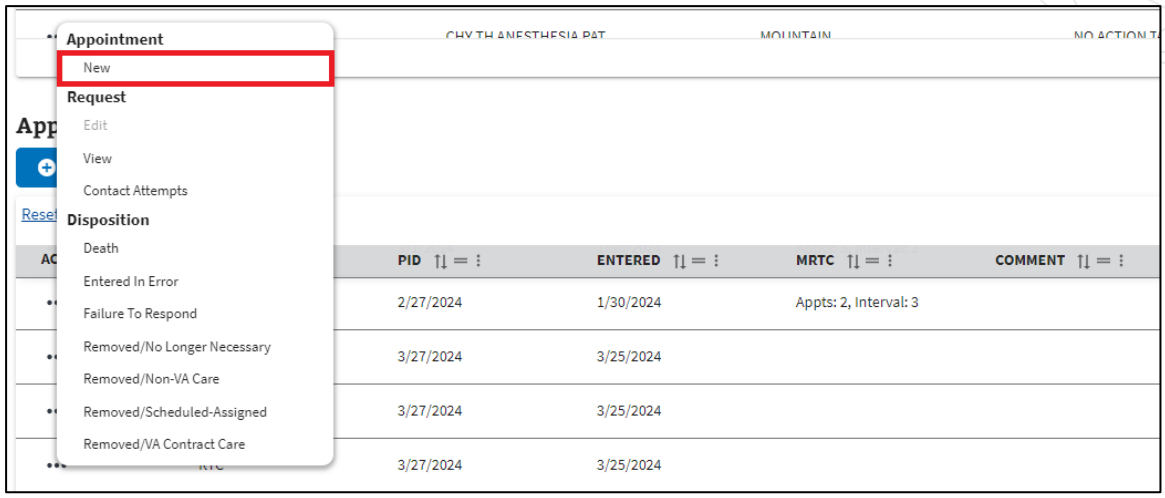


Figure 154: New Option from the Request Actions Dropdown for RTC

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 155**.

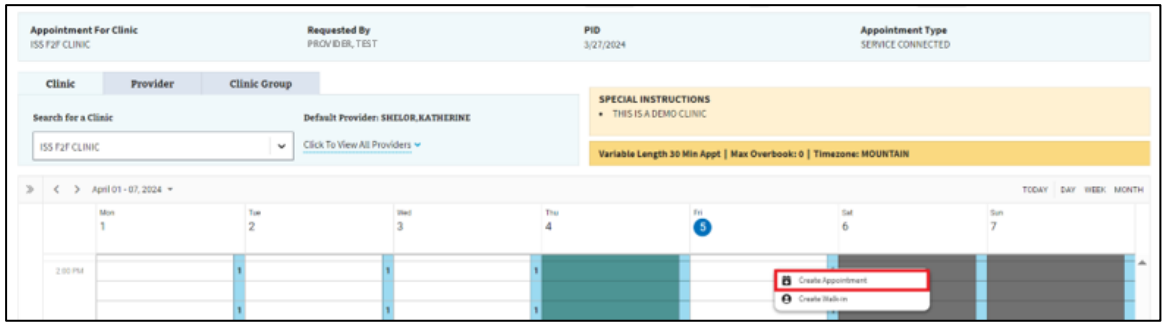


Figure 155: Create Appointment Button for RTC

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 156**. The user can also fill out any optional information as needed.

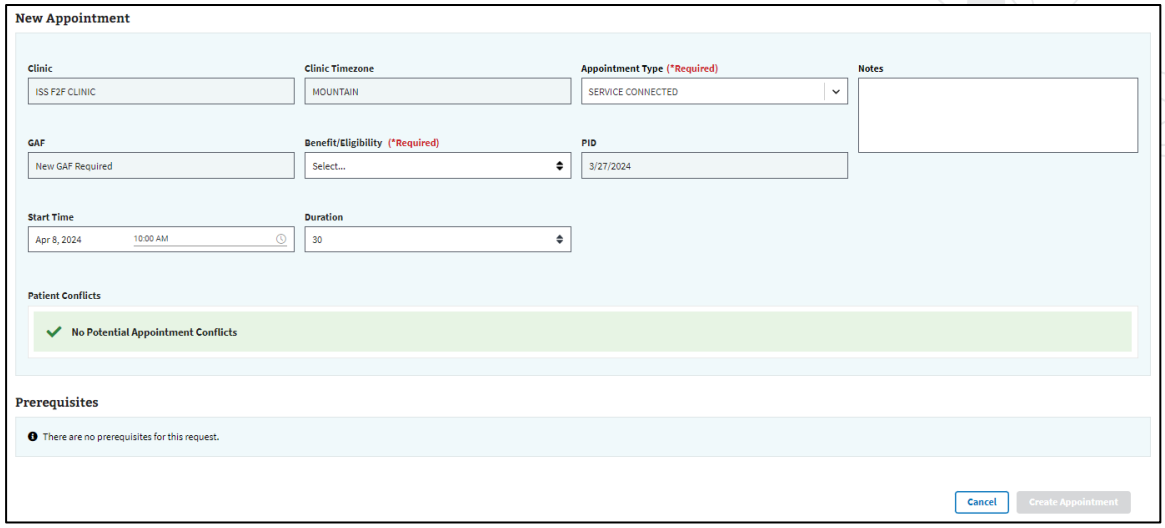


Figure 156: New Appointment for RTC

- *Note: When creating an RTC Appointment, the user may see prerequisites attached to the request, as seen below in **Figure 157**.*



Figure 157: 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. Comments added under the 'Notes" section of the page will be added to comment tracking and available for viewing once the appointment has been created.*

6. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 158**, to create the new RTC appointment.

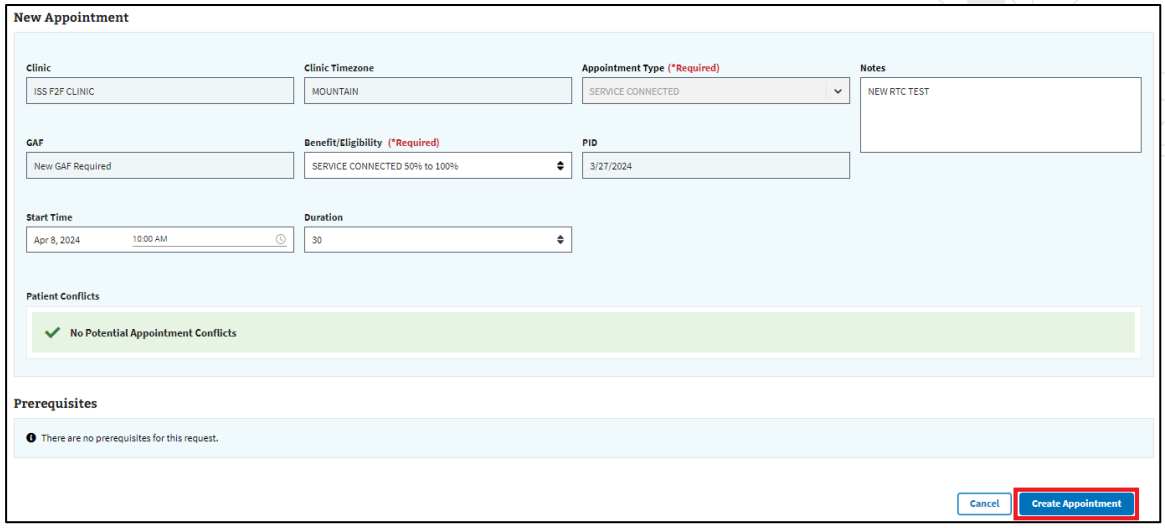


Figure 158: Create Appointment Button for Creating RTC Appointments

- ❖ *Note: The user can also select the "Cancel" button seen in **Figure 158** to exit creating an appointment and go back to the Appointments & Requests page.*

7. The Appointment Successfully Created window, shown below in **Figure 159**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

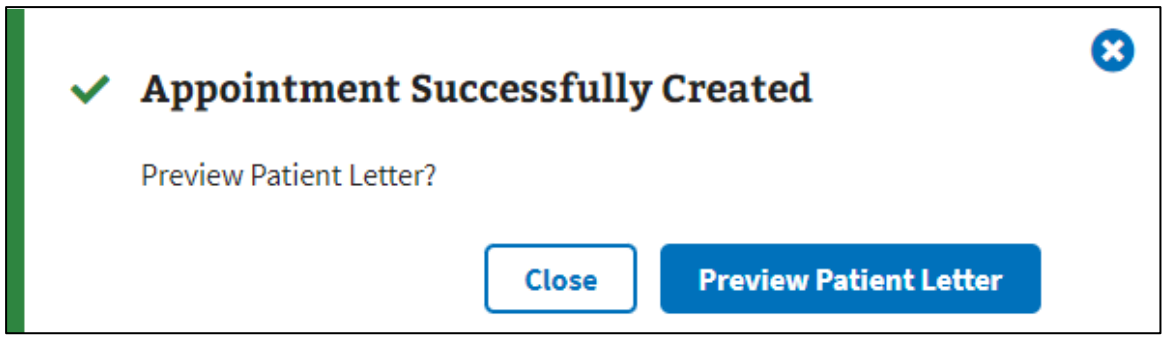


Figure 159: Preview Patient Letter Window for Creating RTC Appointments

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 160** an example.)

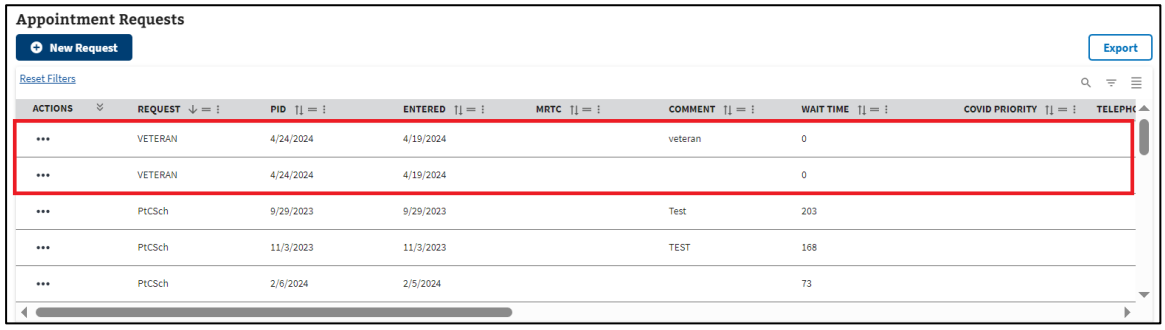


Figure 160: Example for Finding VETERAN Requests

2. Once the VETERAN request is located, the user will select the ellipsis, seen in **Figure 161**, next to the request within the grid.

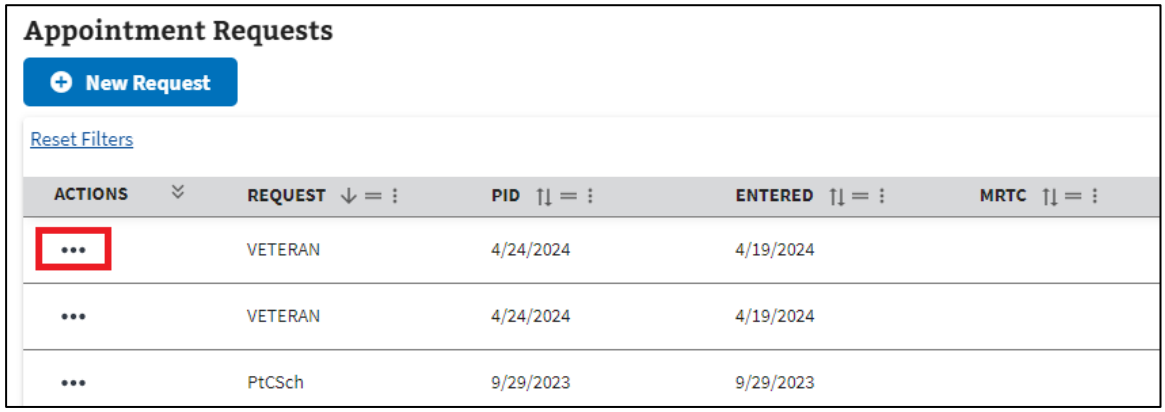


Figure 161: Selecting Action Menu Button to VETERAN Appointments

3. This will cause the action menu to appear. The user will then need to select the “New” option, seen in **Figure 162**.

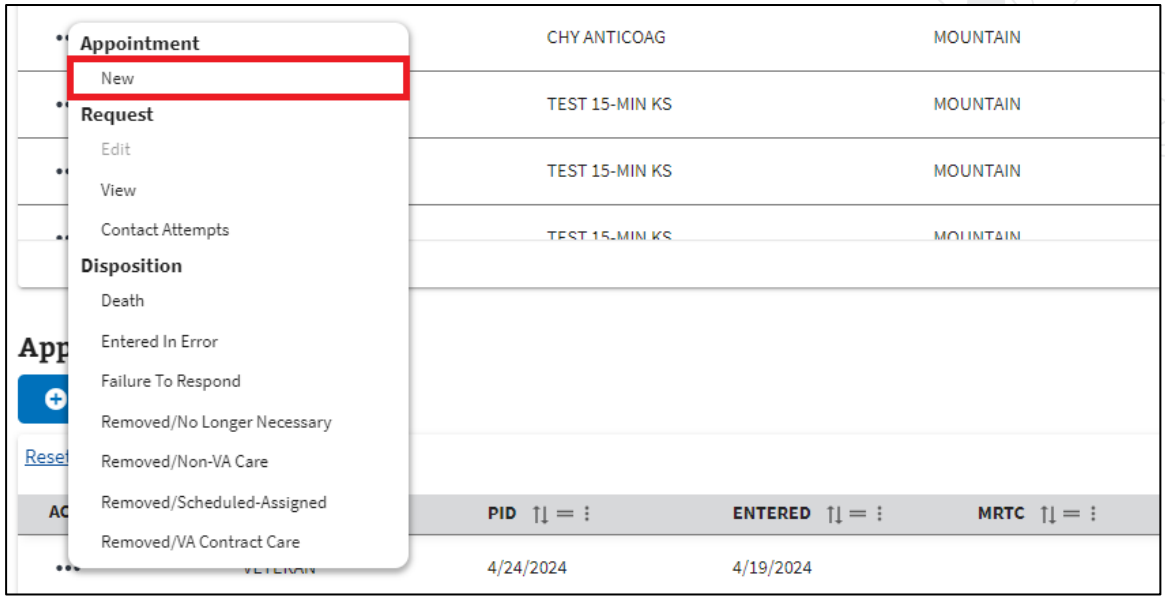


Figure 162: New Option from the Request Actions Dropdown for VETERAN

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 163**, and enter a valid clinic name. Once the information has been entered, a list of clinics will appear in the dropdown.

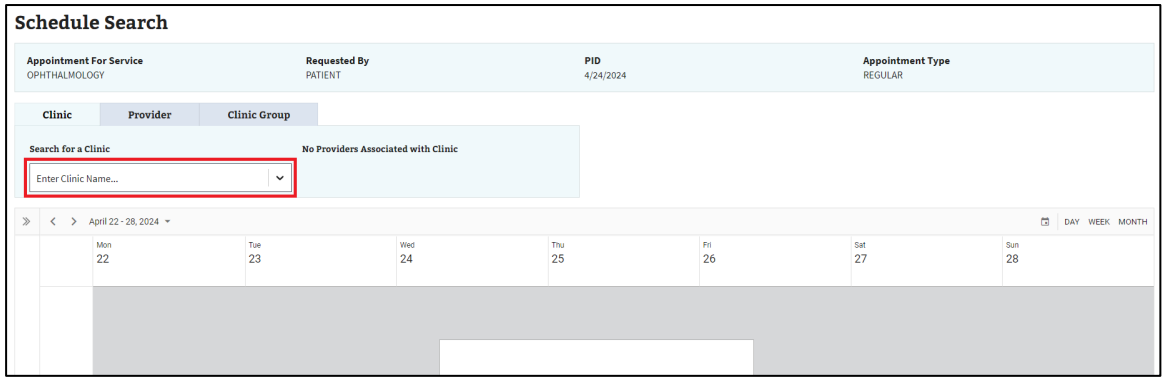


Figure 163: Searching for a Clinic when Creating a VETERAN Appointment

- *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 164** below.*

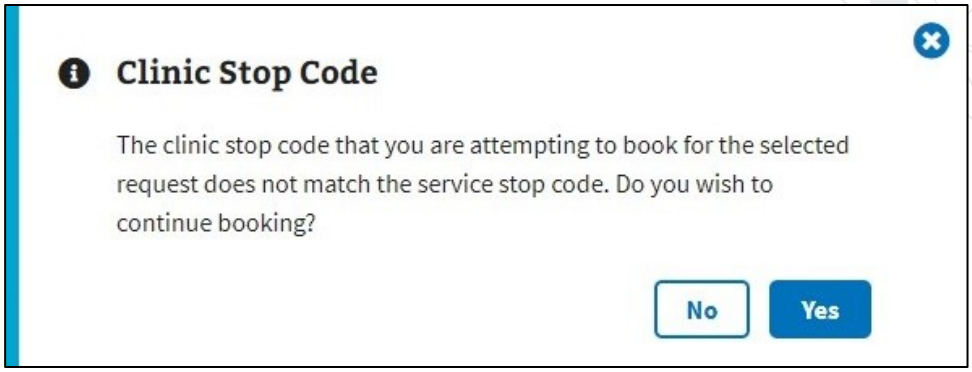


Figure 164: Clinic Stop Code Window for VETERAN Appointments

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 165**.

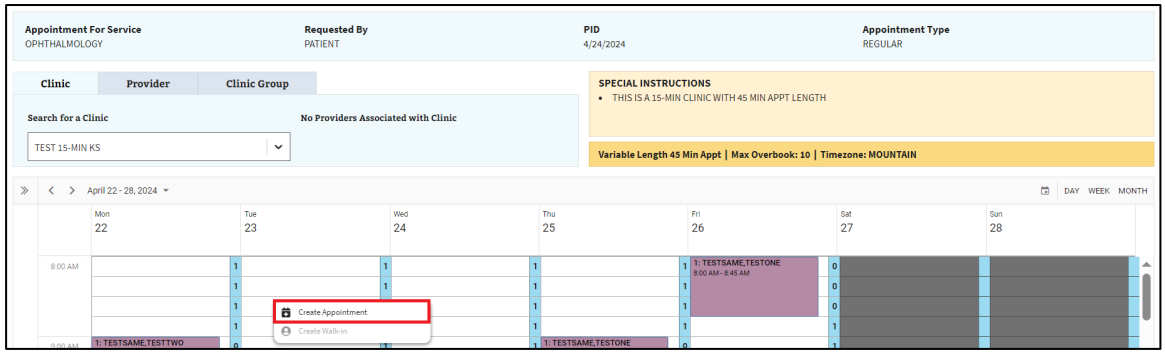


Figure 165: Create Appointment Button for VETERAN

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 166**. The user can also fill out any optional information as needed.

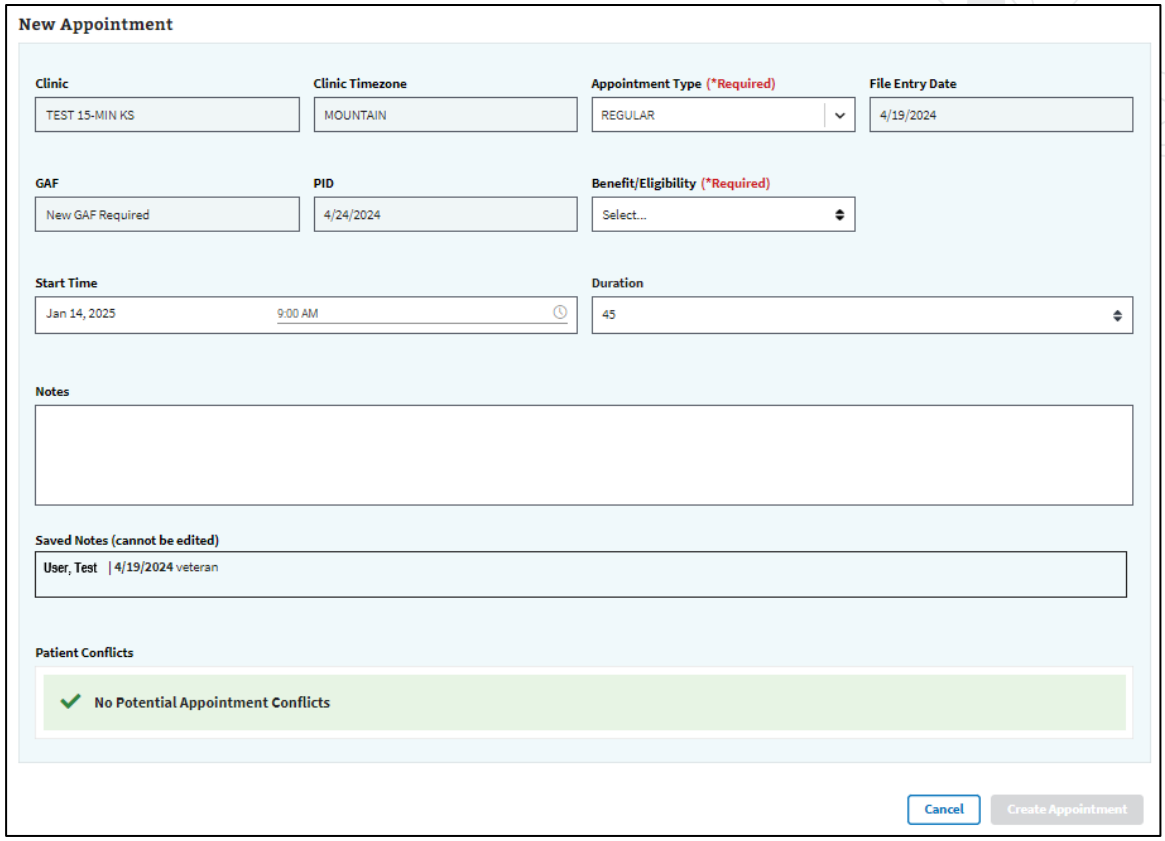


Figure 166: New Appointment Page for VETERAN

- *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. Comments added under the 'Notes" section of the page will be added to comment tracking and available for viewing once the appointment has been created.*

7. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 167**, to create the new VETERAN appointment.

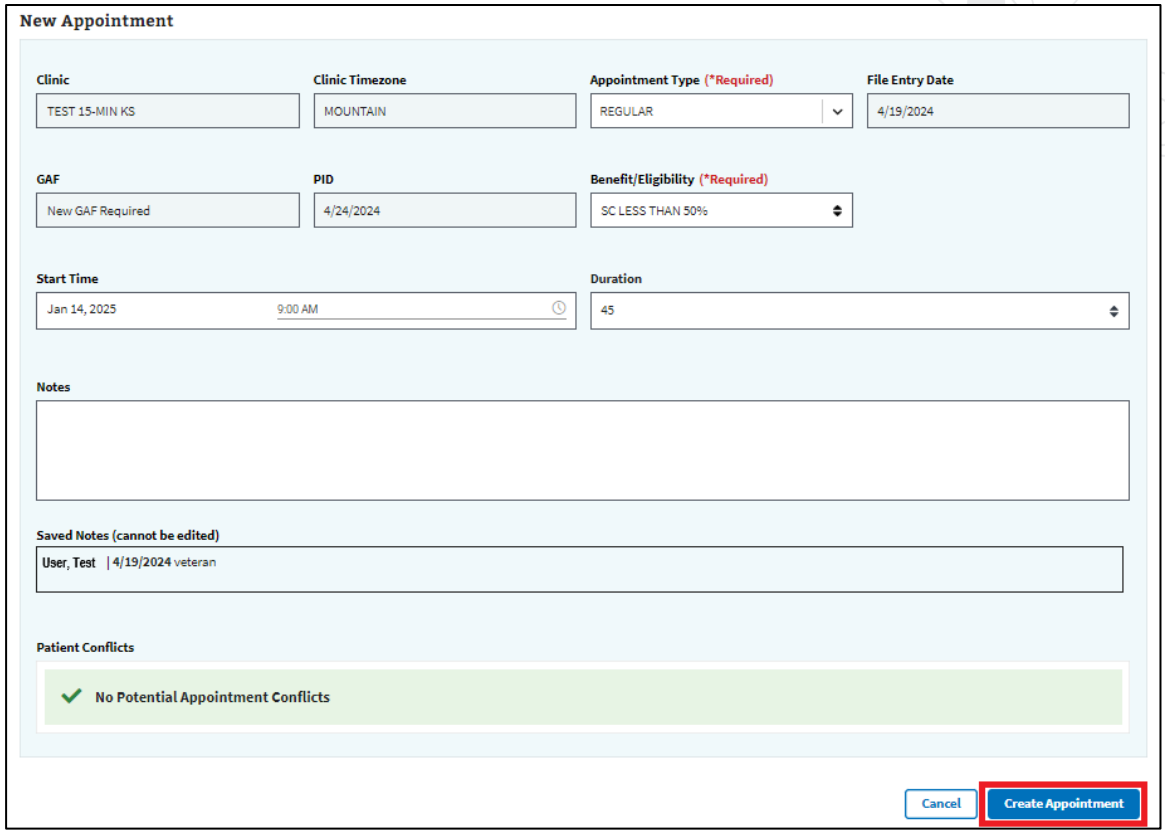


Figure 167: Create Appointment Button for Creating VETERAN Appointments

- *Note: The user can also select the "Cancel" button seen in **Figure 167** to exit creating an appointment and go back to the Appointments & Requests page.*

8. The Appointment Successfully Created window, shown below in **Figure 168**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

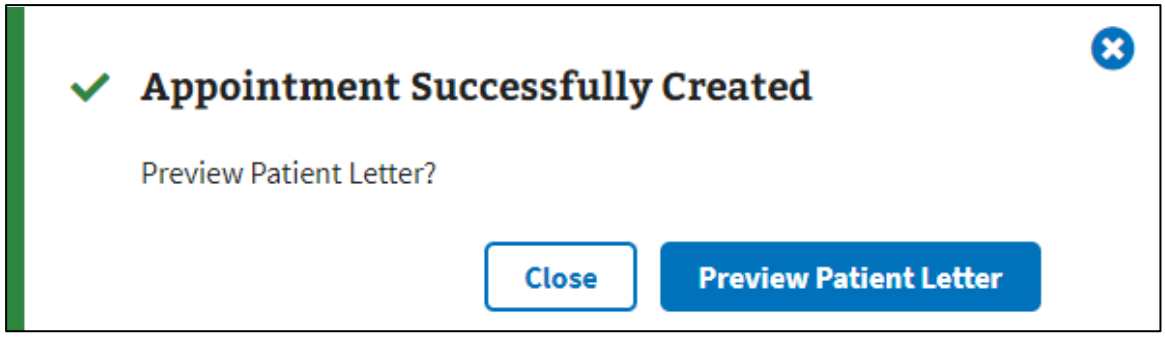


Figure 168: Preview Patient Letter Window for Creating VETERAN Appointments

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 **i**n **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 169**.

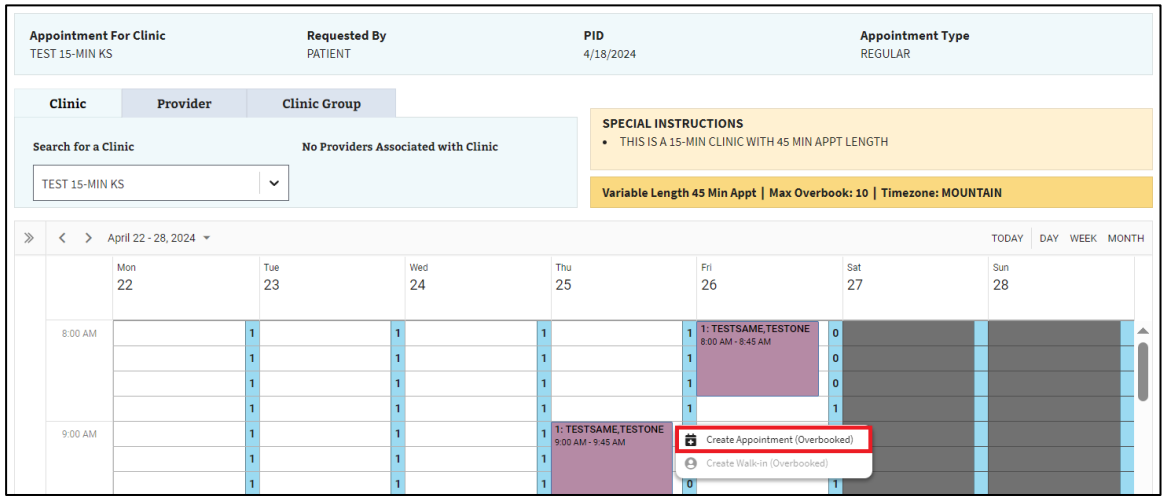


Figure 169: Create Appointment (Overbooked) Button

2. The Overbook Slot window will appear, as shown in **Figure 170**, and the user will be asked to confirm before proceeding with appointment creation as normal.

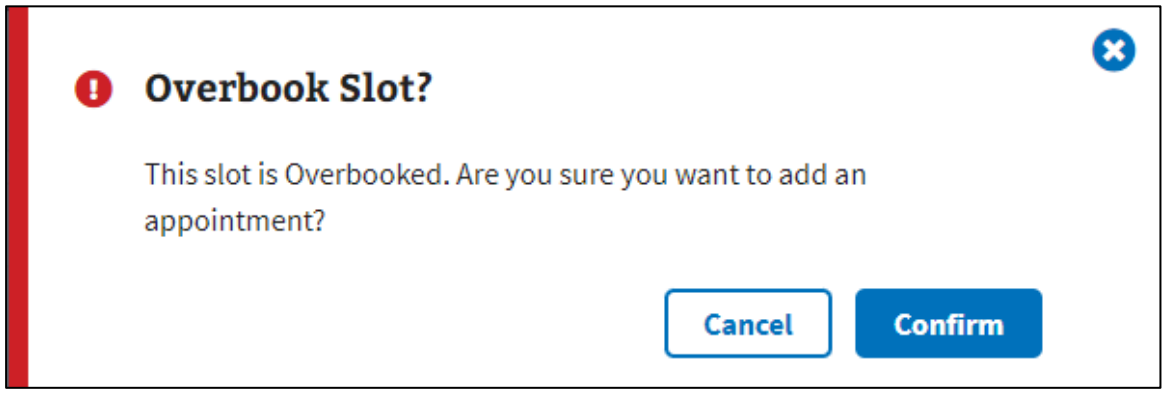


Figure 170: Overbook Slot Window

- *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 171**, and the user can move forward with creating the appointment as usual.

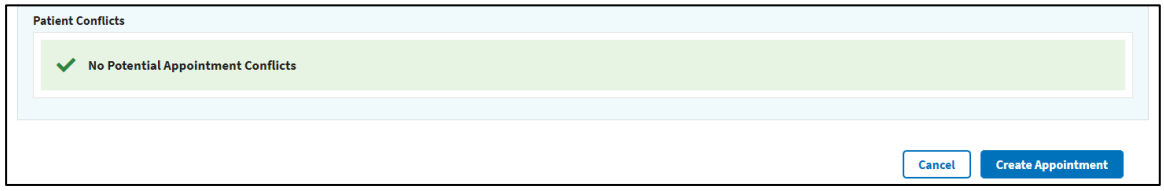


Figure 171: No Potential Appointment Conflicts Notification

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 172**. The user can then choose to continue making the appointment for the patient or go back and choose a different day and time.

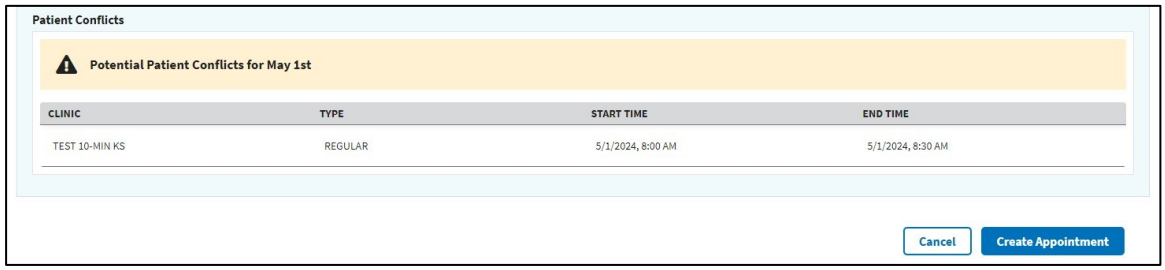


Figure 172: Potential Appointment Conflicts Notification

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 173** below).

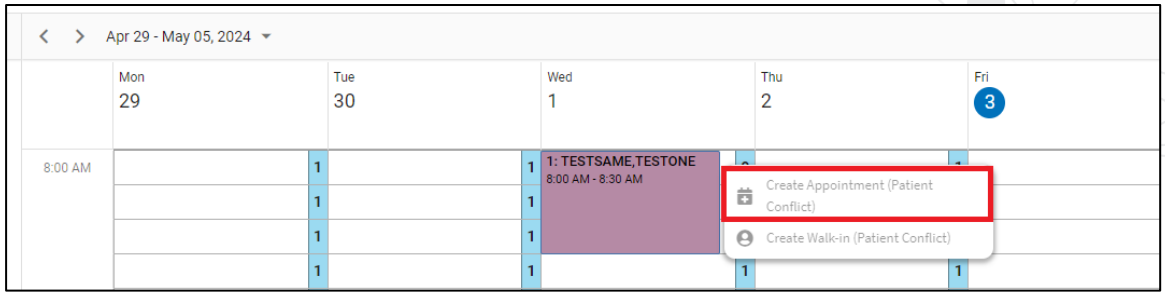


Figure 173: Patient Conflict on Calendar

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 174**.

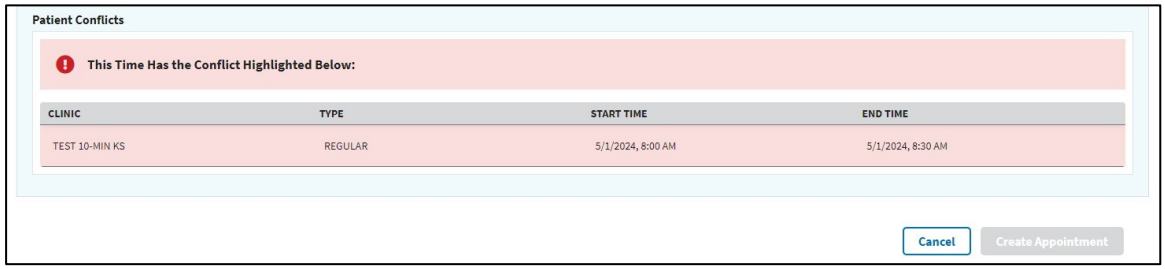


Figure 174: Patient Conflict on New Appointment Page

- ❖ *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 175**, next to the appointment within the Pending grid under Appointments.

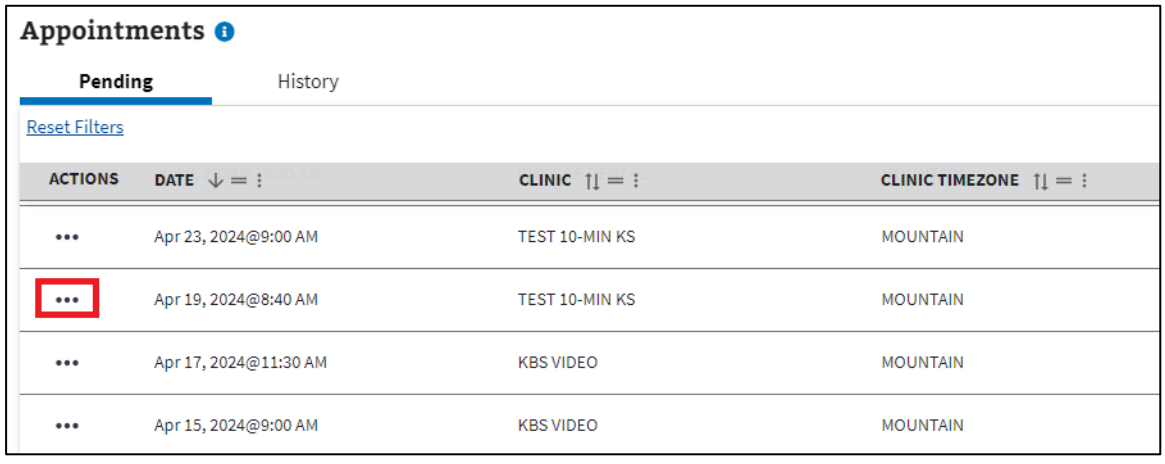


Figure 175: Action Menu Button to View Appointments

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

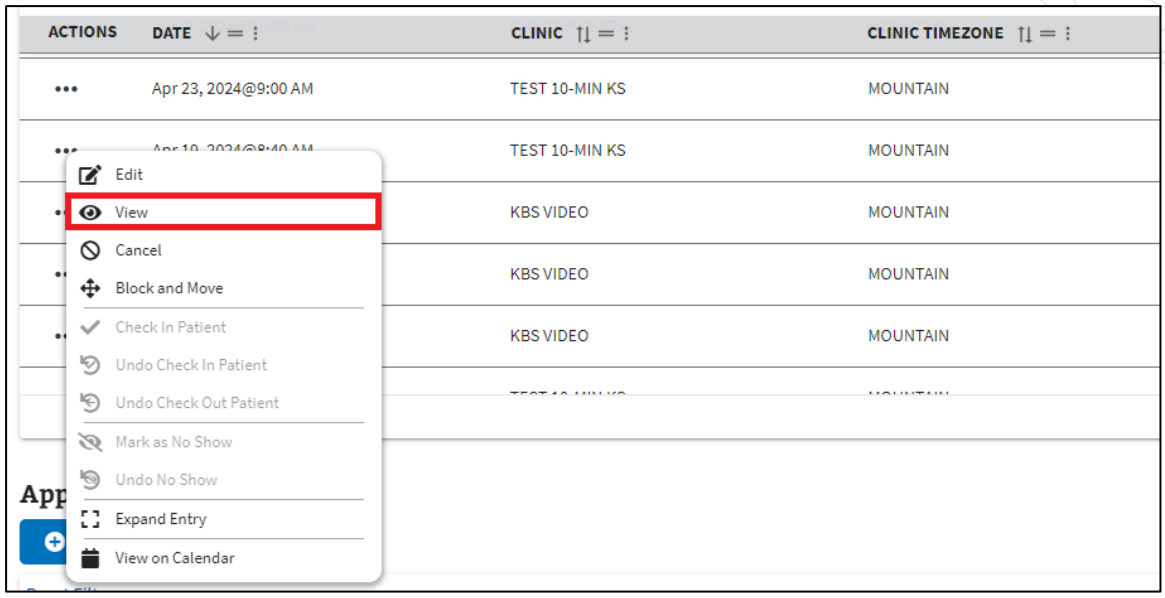


Figure 176: View Option from Pending Appointments Action Menu

3. The user will be brought to the View Appointment page, shown below in **Figure 177**.



Figure 177: 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 177** for example).*

❖ *Note: The user has the ability to print a patient letter by selecting the "Print" button seen in **Figure 178**.*

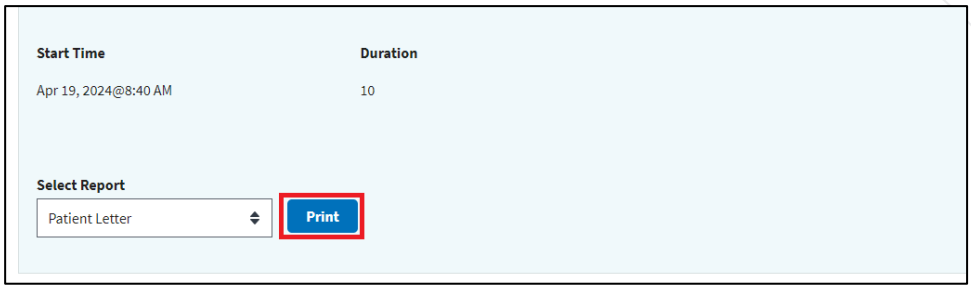


Figure 178: Print Patient Letter Button from View Appointment Page

4.4.2 Edit

1. To edit an appointment, the user will select the ellipsis, seen in **Figure 179**, next to the appointment within the Pending grid under Appointments.

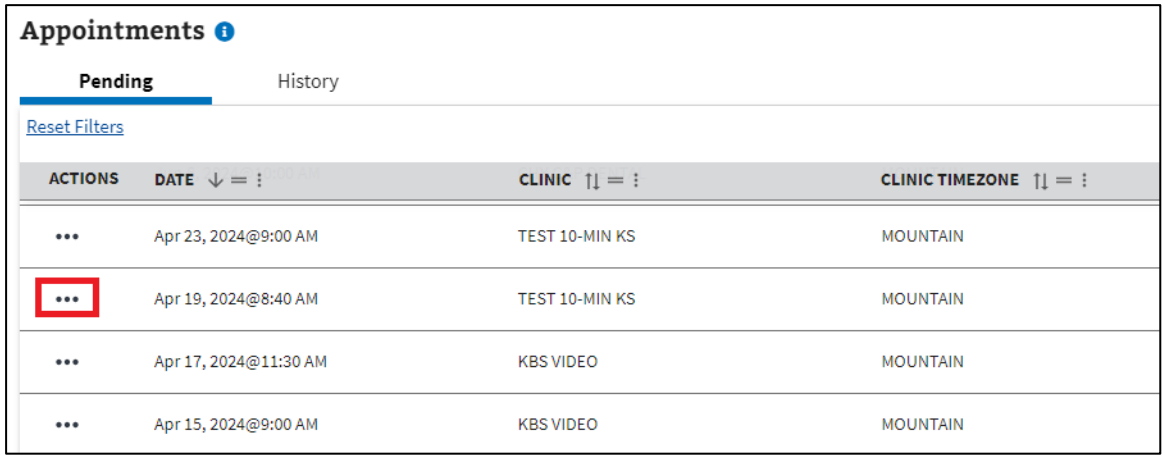


Figure 179: Action Menu Button to Edit Appointments

2. This will cause the action menu to appear. The user will then need to select the "Edit" option, seen in **Figure 180**.

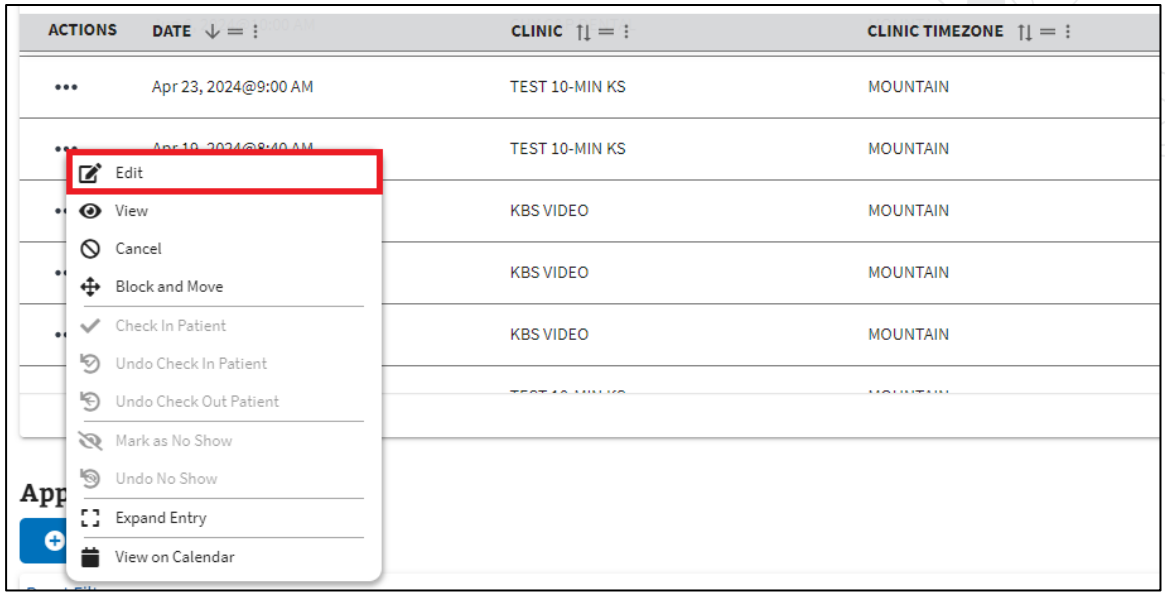


Figure 180: Edit Option from the Pending Appointments Action Menu

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 181**.

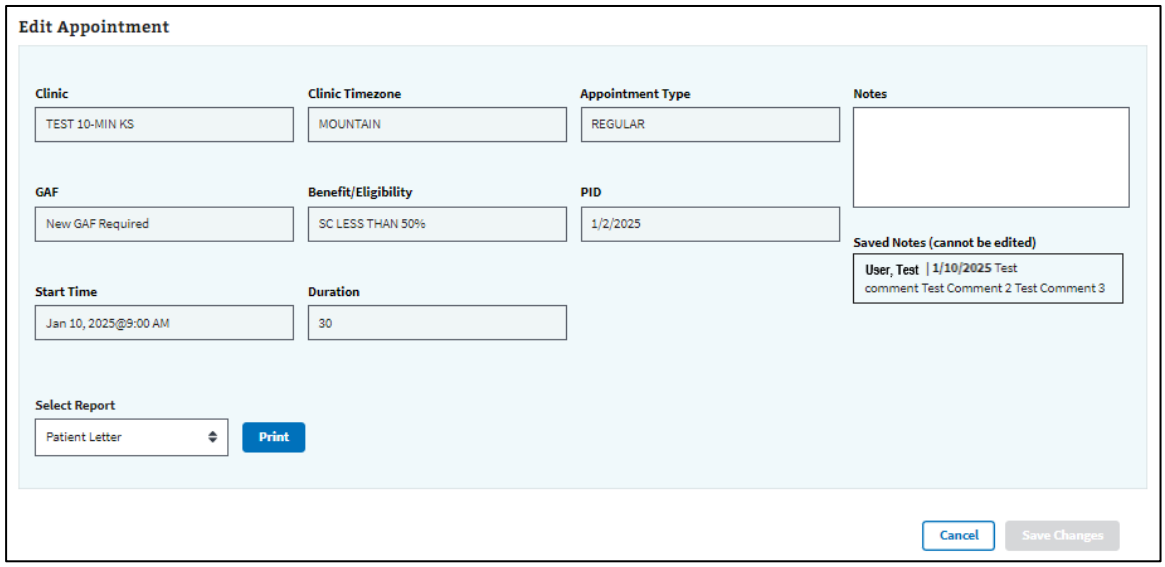


Figure 181: Edit Appointment Page

- ❖ *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 181** for example).*

4. Once all edits have been made, the user will need to select the "Save Changes" button, seen in **Figure 182**, to save any edits to the appointment.

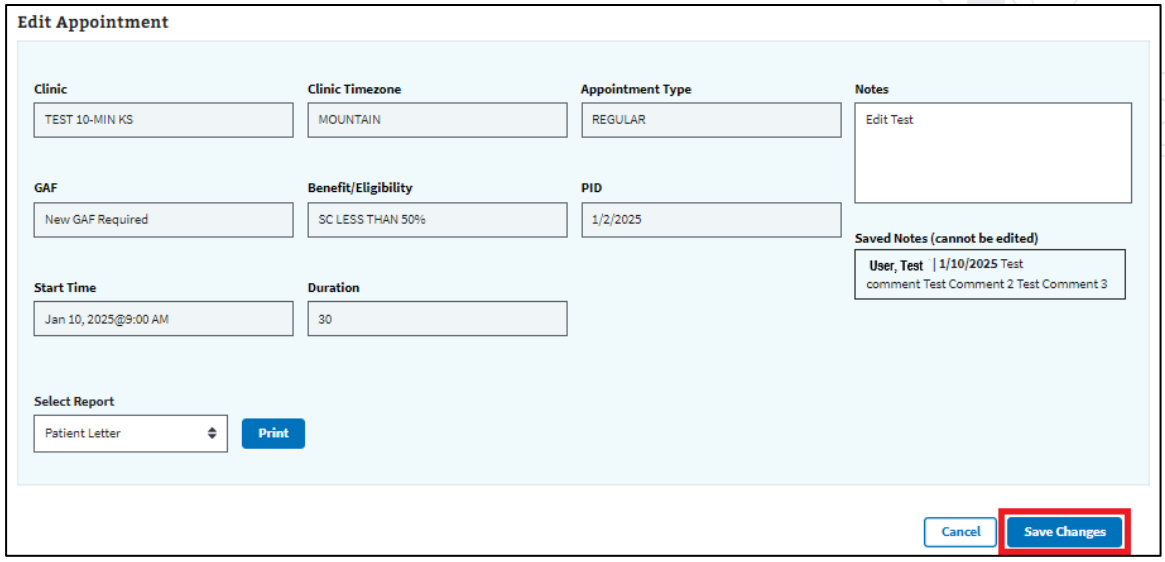


Figure 182: Save Changes Button for Edit Appointment Page

- ❖ *Note: The user can also select the "Cancel" button seen in **Figure 182** 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 183**, next to the appointment within the Pending grid under Appointments.

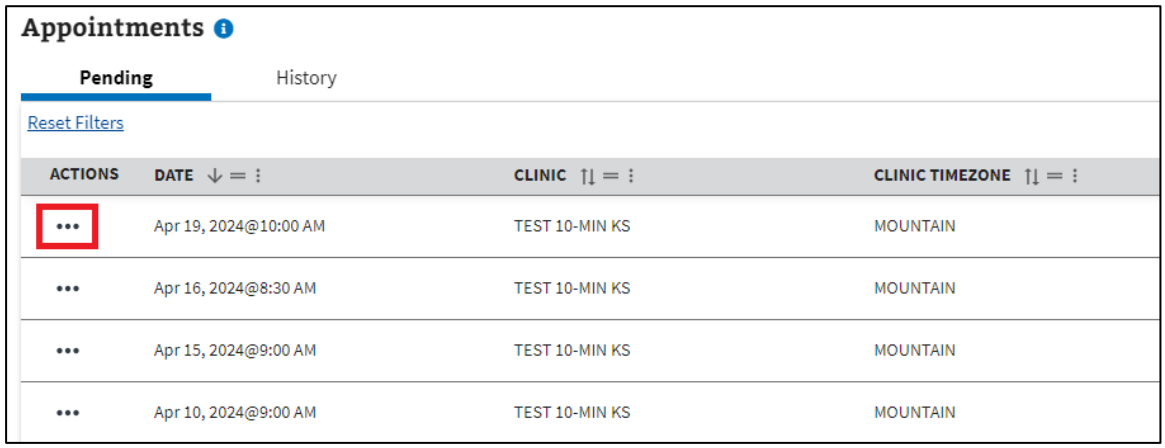


Figure 183: Action Menu Button to Cancel an Appointment

2. This will cause the action menu to appear. The user will then need to select the "Cancel" option, seen in **Figure 184**.

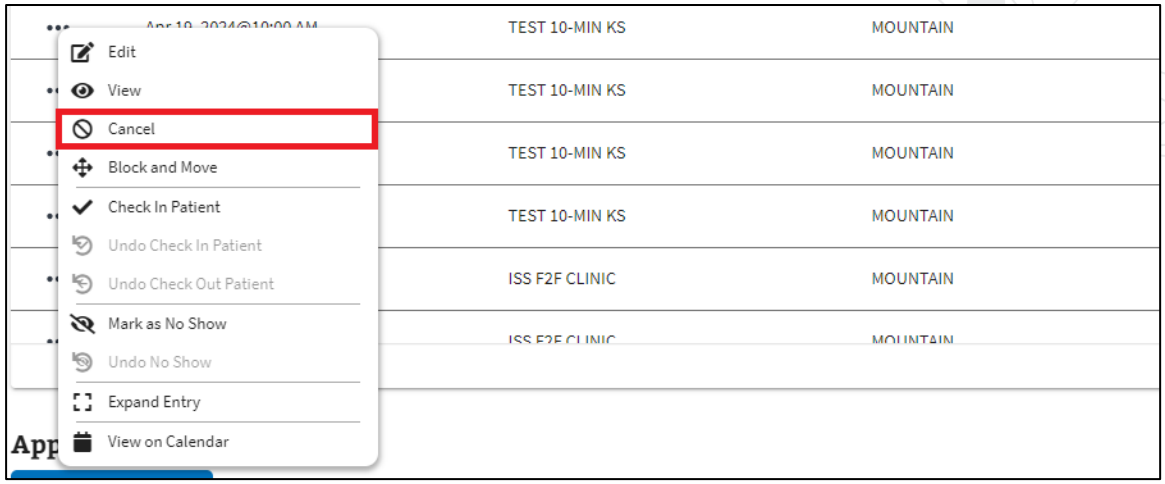


Figure 184: Cancel Option from the Pending Appointments Action Menu

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 185**. The user can also fill out any optional information as needed.

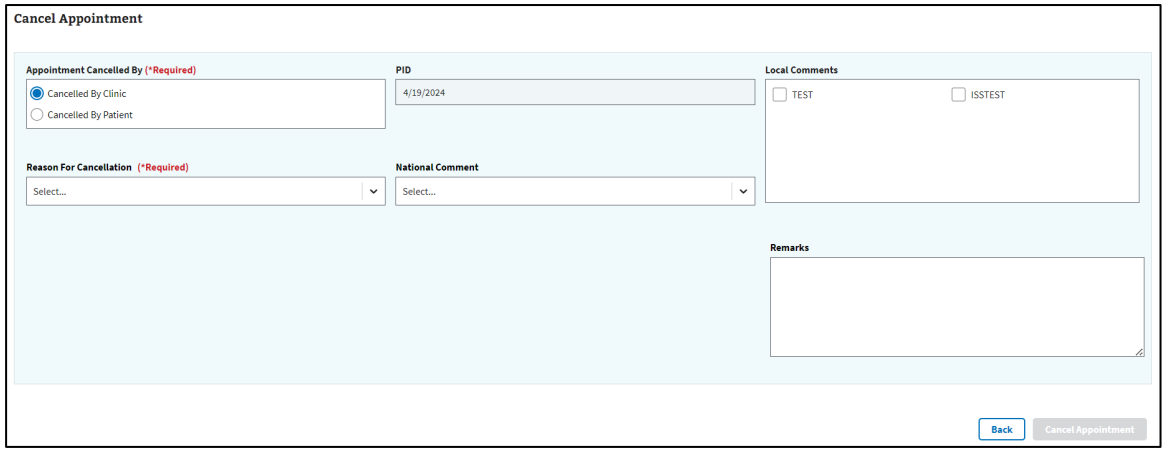


Figure 185: Cancel Appointment Page

- *Note: The PID section, highlighted below in **Figure 186**, will be editable when an appointment is cancelled by a patient.*

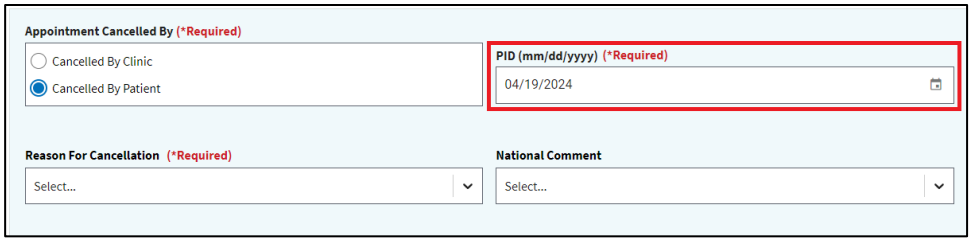


Figure 186: Editable PID Example when Cancelled by Patient

4. Once all applicable information has been filled, the user will then select the “Cancel Appointment” button, seen in **Figure 187**, to cancel the appointment.

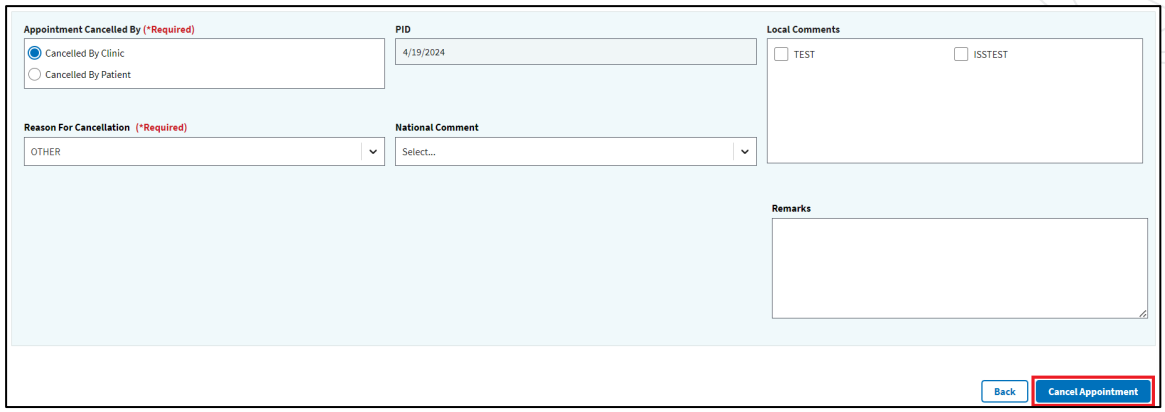


Figure 187: Cancel Appointment Button on the Cancel Appointment Page

5. The Appointment Successfully Cancelled window, shown below in **Figure 188**, will appear. The user can choose to preview the cancellation letter, if needed, or select “Close” to continue.



Figure 188: 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 189**, next to the appointment within the Pending grid under Appointments.

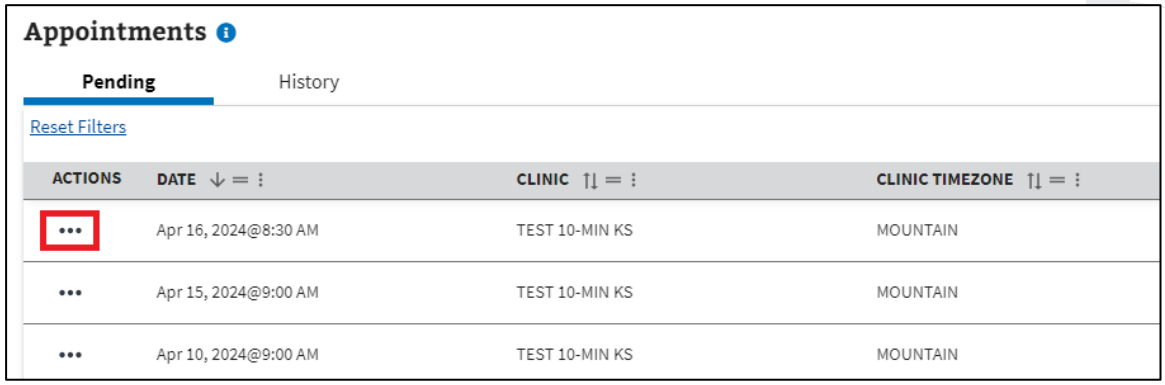


Figure 189: Action Menu Button to Cancel MRTC Appointments

2. This will cause the action menu to appear. The user will then need to select the "Cancel" option, seen in **Figure 190**.

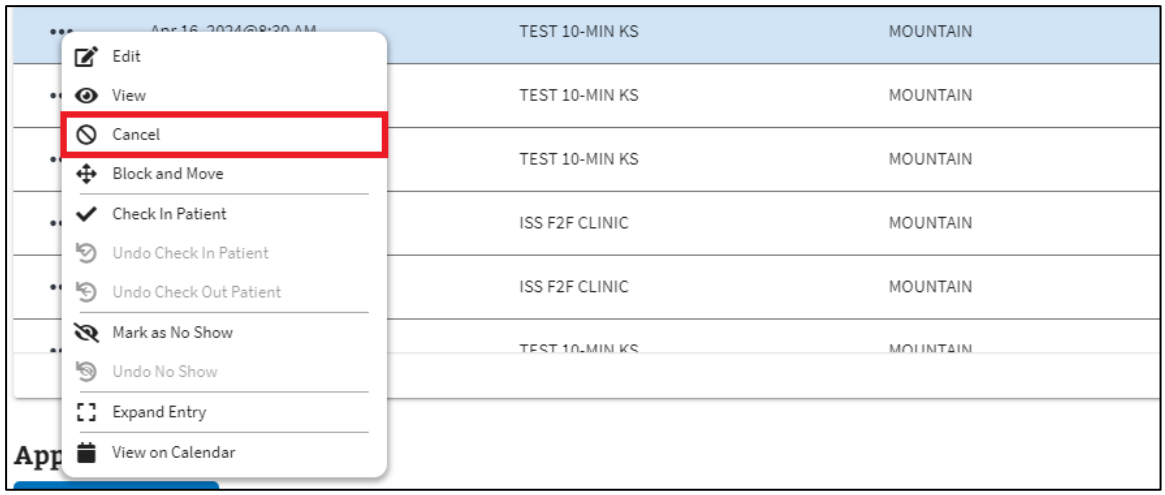


Figure 190: Cancel Option from the Pending Appointments Action Menu for MRTC

3. Once selected, the user will be brought to the Cancel MRTC Appointment page, as seen below in **Figure 191**. 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.

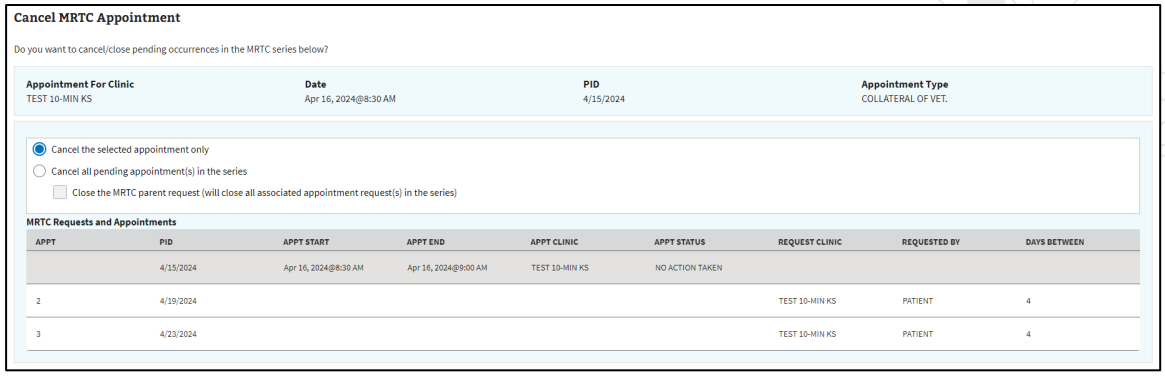


Figure 191: Cancel MRTC Appointment Options for Parent and Child Appointments

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 192**. The user can also fill out any optional information as needed.

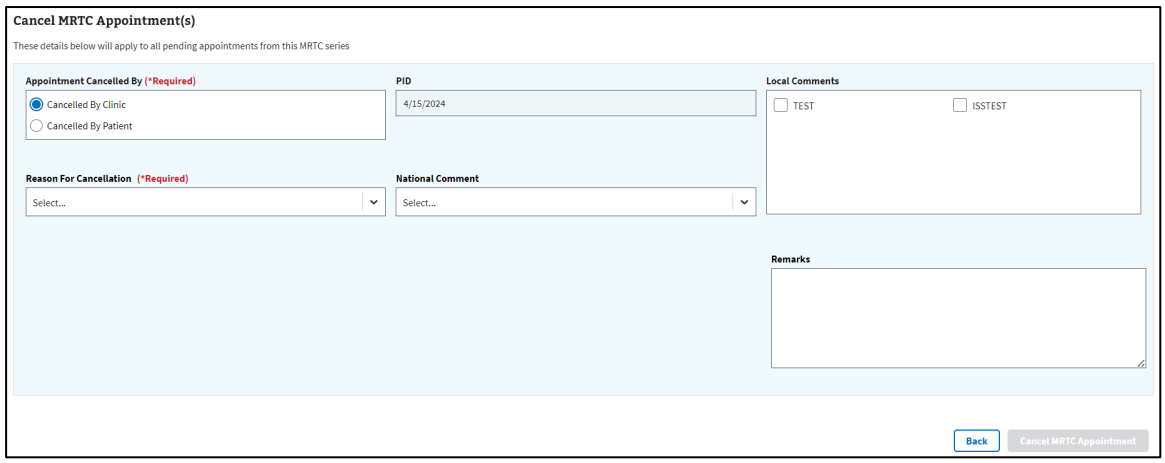


Figure 192: Cancel MRTC Appointment(s) Page

5. Once all applicable information has been filled out, the user will then select the “Cancel MRTC Appointment” button, seen below in **Figure 193**, to cancel the appointment.

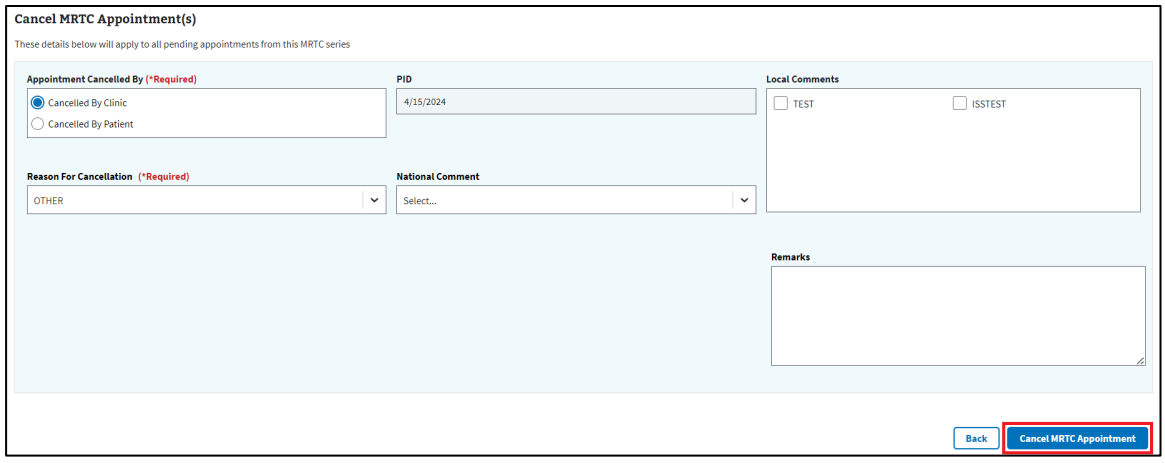


Figure 193: Cancel MRTC Appointment Button

6. The Appointment Successfully Cancelled window, shown below in **Figure 194**, will appear. The user can choose to preview the cancellation letter, if needed, or select "Close" to continue.



Figure 194: 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 195**, next to the appointment within the Pending grid under Appointments.

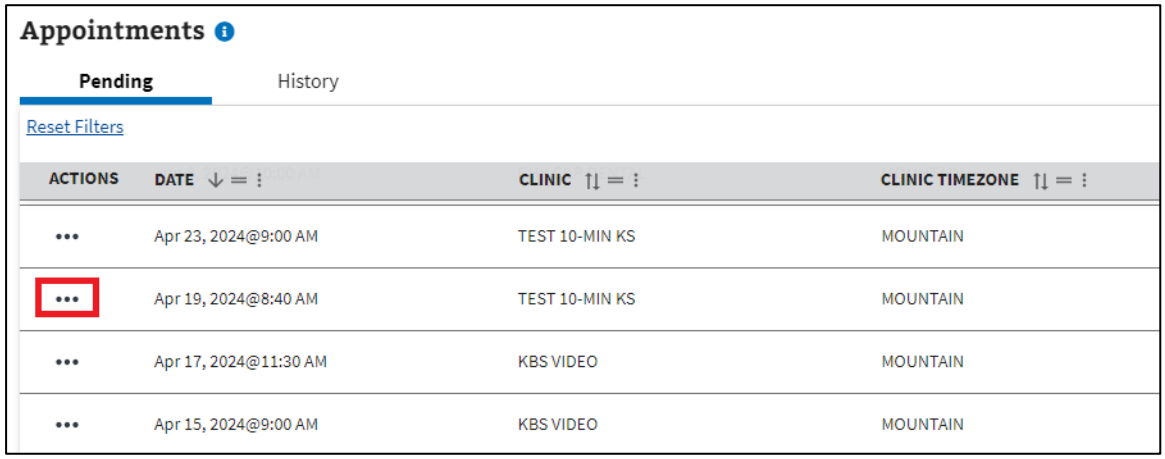


Figure 195: Action Menu Button to Expand Entry

2. This will cause the action menu to appear. The user will then need to select the "Expand Entry" option, seen in **Figure 196**.

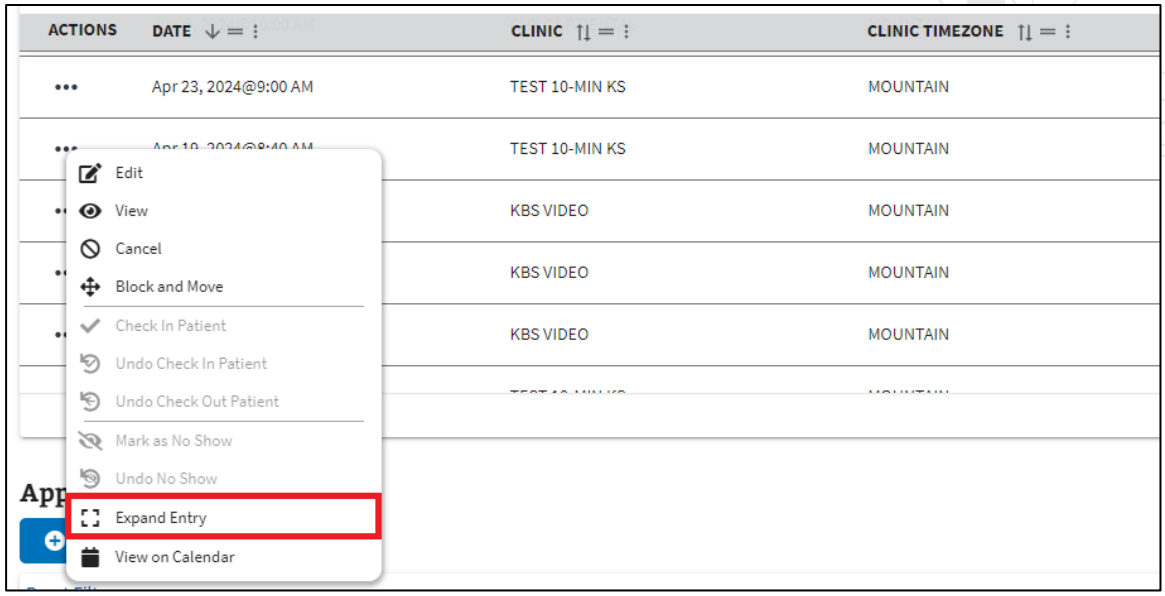


Figure 196: Expand Entry Option from Pending Appointments Action Menu

3. The user will be brought to the Expanded Entry page, shown below in **Figure 197**. The user can view the fields within expanded entry by either selecting the "+" button next to an individual row, or by selecting "Expand all +."

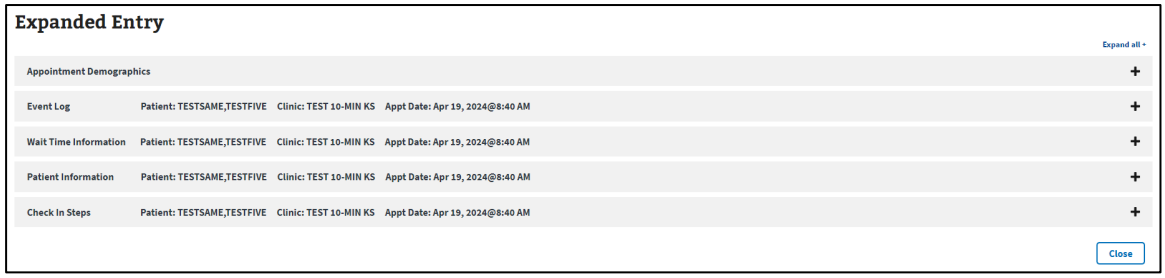


Figure 197: Expanded Entry Page

4.4.6 Block and Move

1. To block and move an appointment, the user will select the ellipsis, seen in **Figure 198**, next to the appointment within the Pending grid under Appointments.

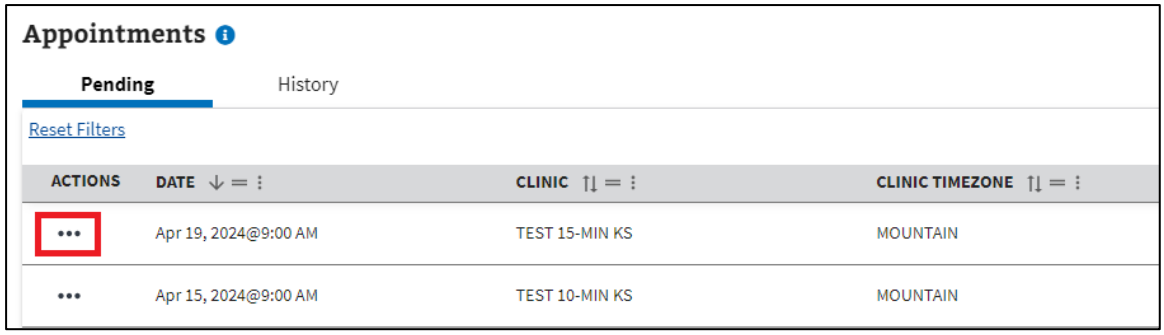


Figure 198: Action Menu Button to Block and Move an Appointment

2. This will cause the action menu to appear. The user will then need to select the “Block and Move” option, seen in **Figure 199**.

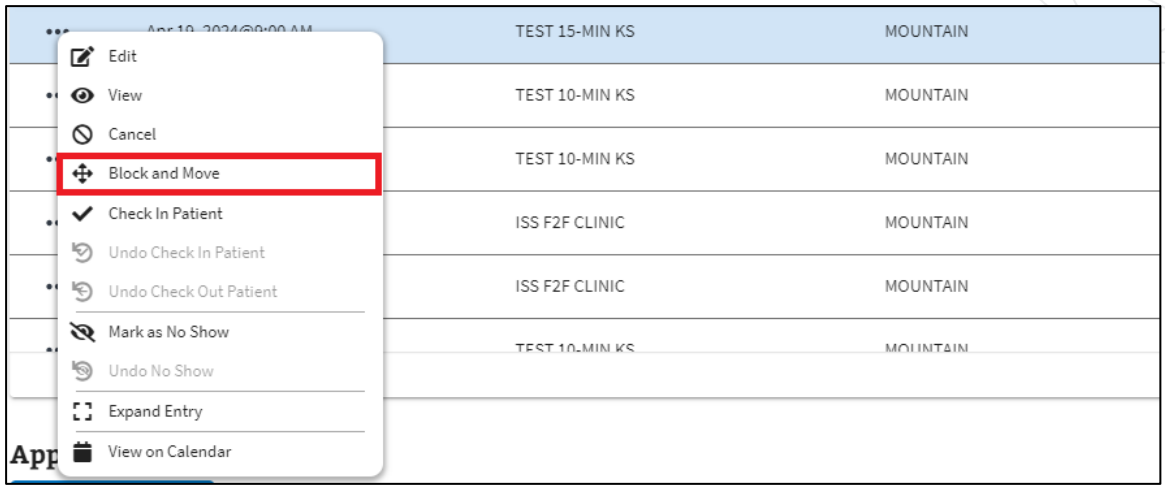


Figure 199: Block and Move Option from the Pending Appointments Action Menu

3. The user will be brought to the Block and Move Appointment page, seen below in **Figure 200**. The user will need to navigate to the preferred available timeslot on the calendar and left click on the date.

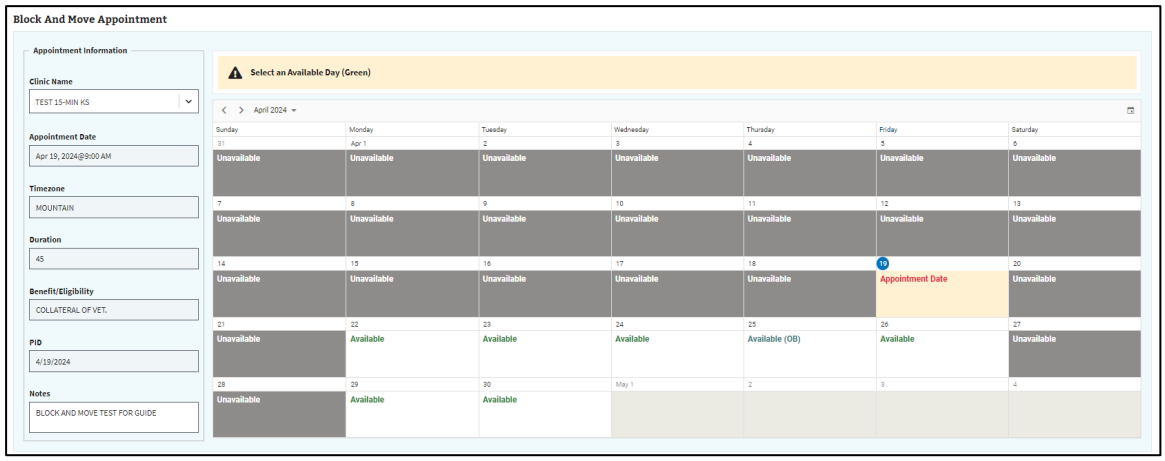


Figure 200: Block and Move Appointment Page

- *Note: The user can use the Appointment Information section, seen in **Figure 201**, to change any of the editable fields on the appointment.*

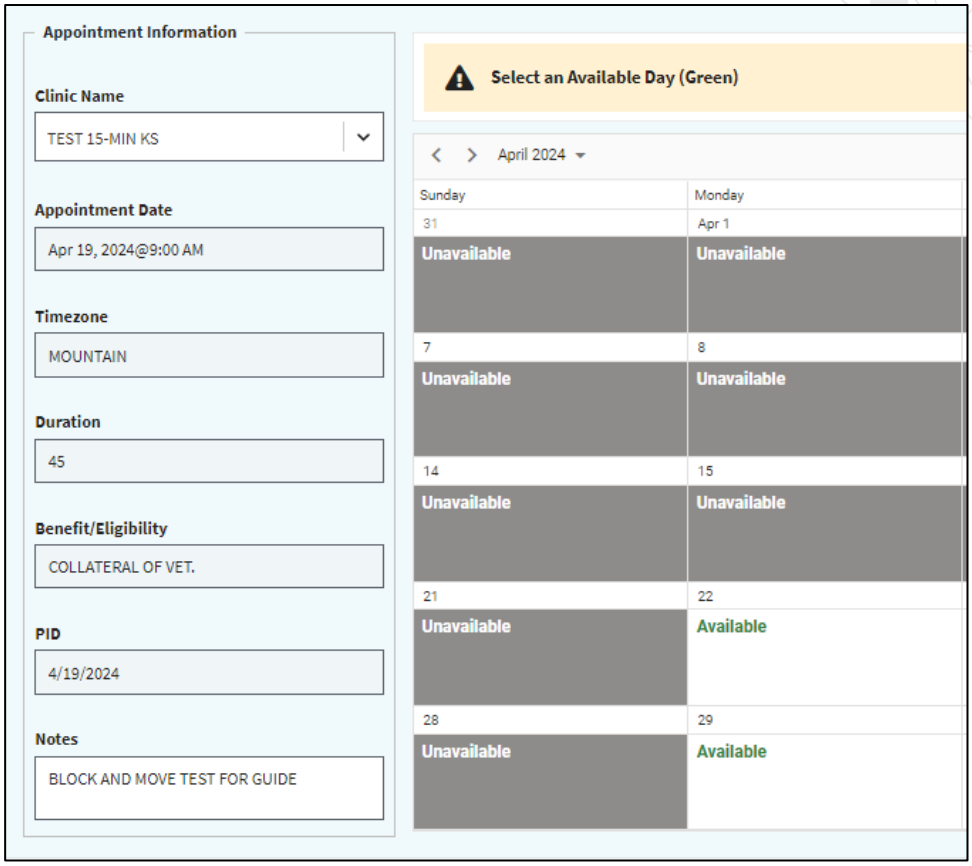


Figure 201: Appointment Information Section for Block and Move

4. Once an available date is selected, the user can then select the “Block and Move” button, seen in **Figure 202**, to block and move the appointment to the intended date.

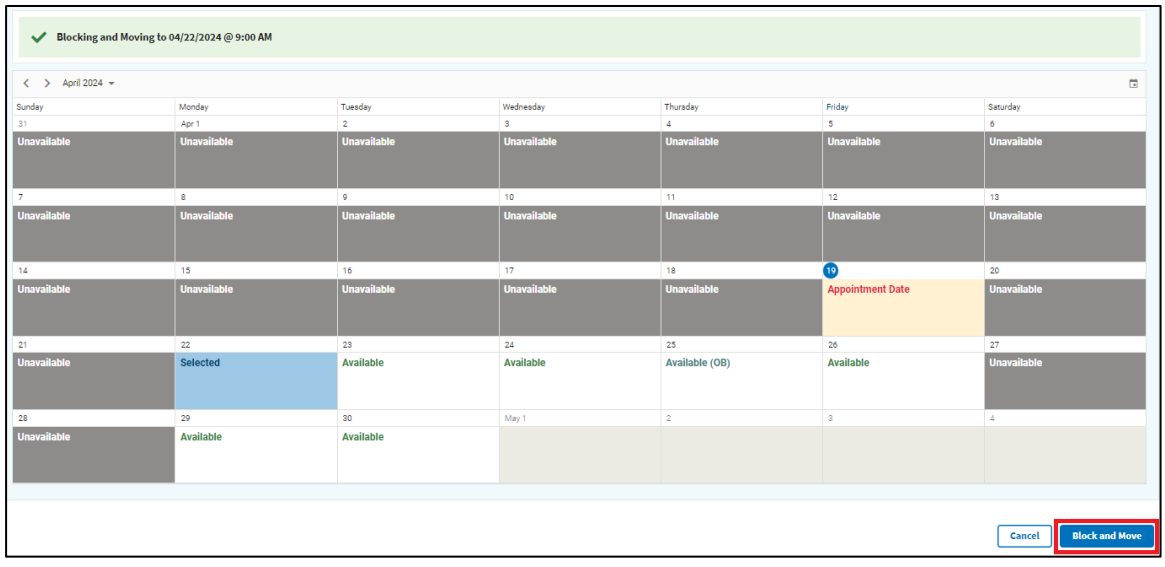


Figure 202: Block and Move Button

5. The Appointment Successfully Created window, shown below in **Figure 203**, will appear. The user can choose to preview the patient letter, if needed, or select "Close" to continue.

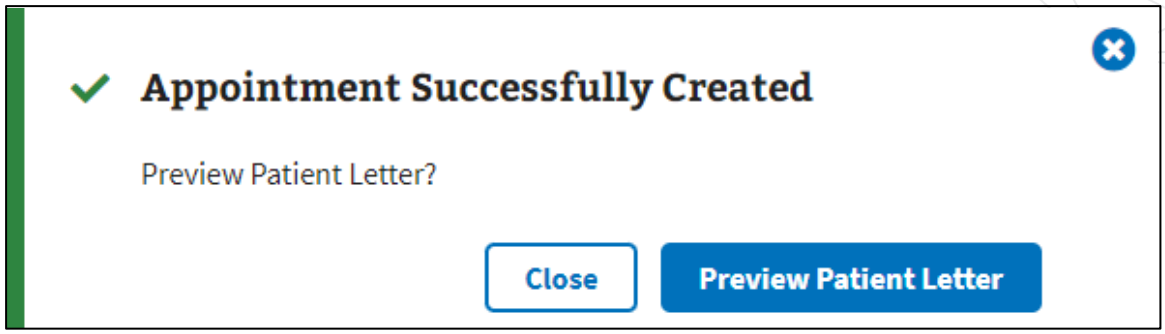


Figure 203: Preview Patient Letter for Block and Move

4.4.7 Check In

1. To check in an appointment, the user will select the ellipsis, seen in **Figure 204**, next to the appointment within the Pending grid under Appointments.

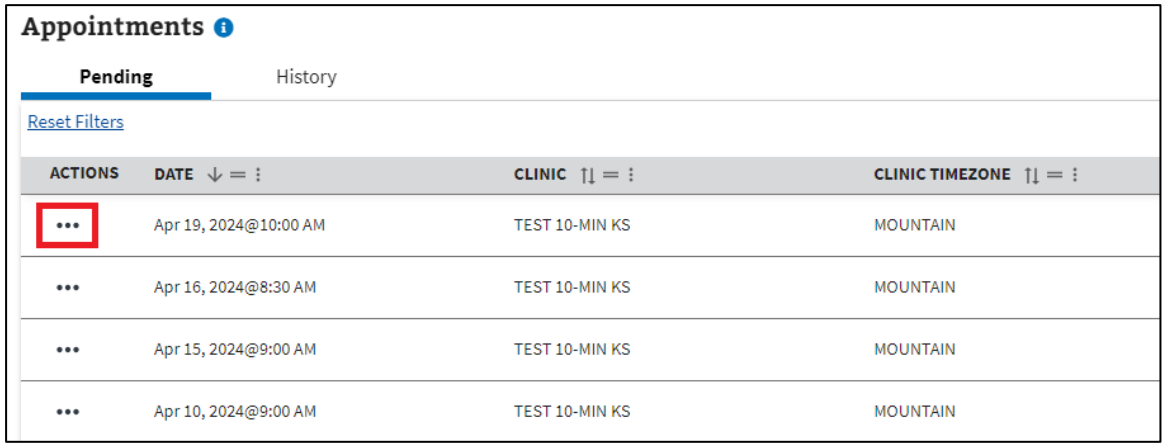


Figure 204: Action Menu Button to Check In Appointments

- *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 205**.

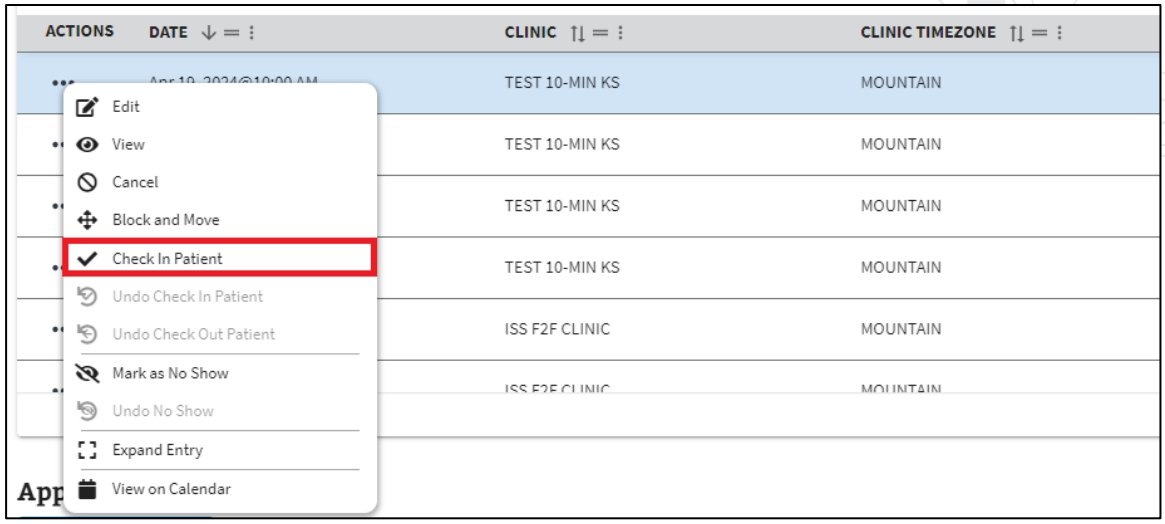


Figure 205: Check In Patient Option from the Pending Appointments Action Menu

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 206**, to check the appointment in.

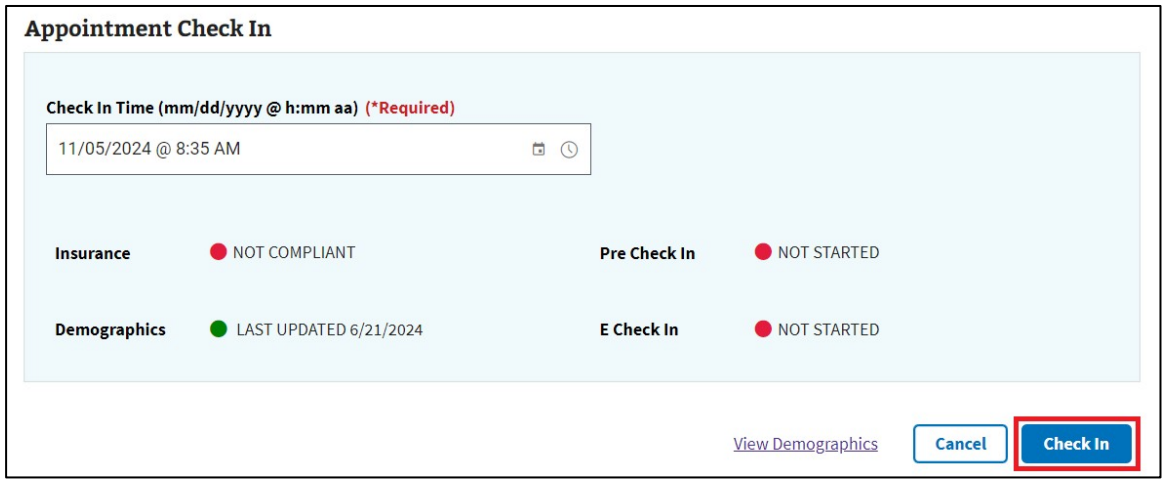


Figure 206: Check In Button

- *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 206** 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 207**, next to the appointment within the Pending grid under Appointments.

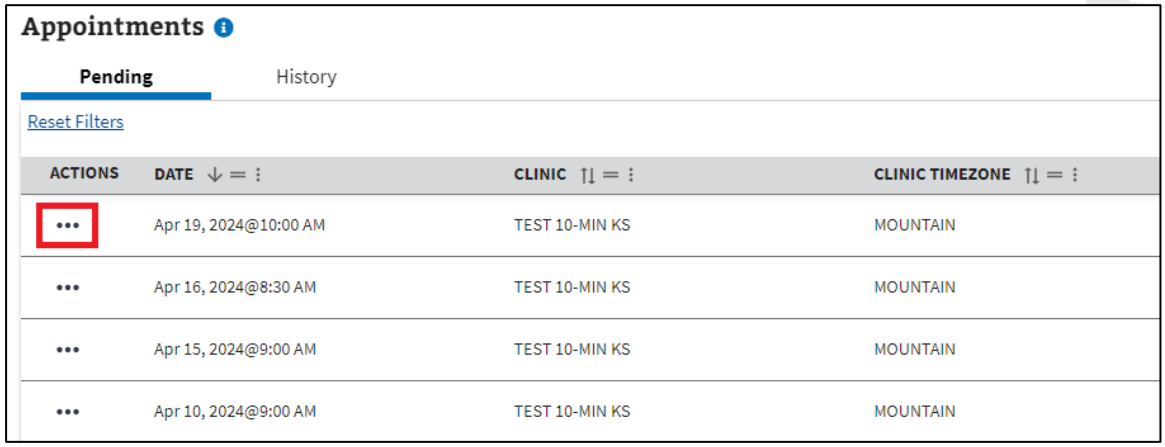


Figure 207: Action Menu Button to Undo Check In

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 208**. This will cause the page to automatically refresh and the appointment to no longer be checked in.

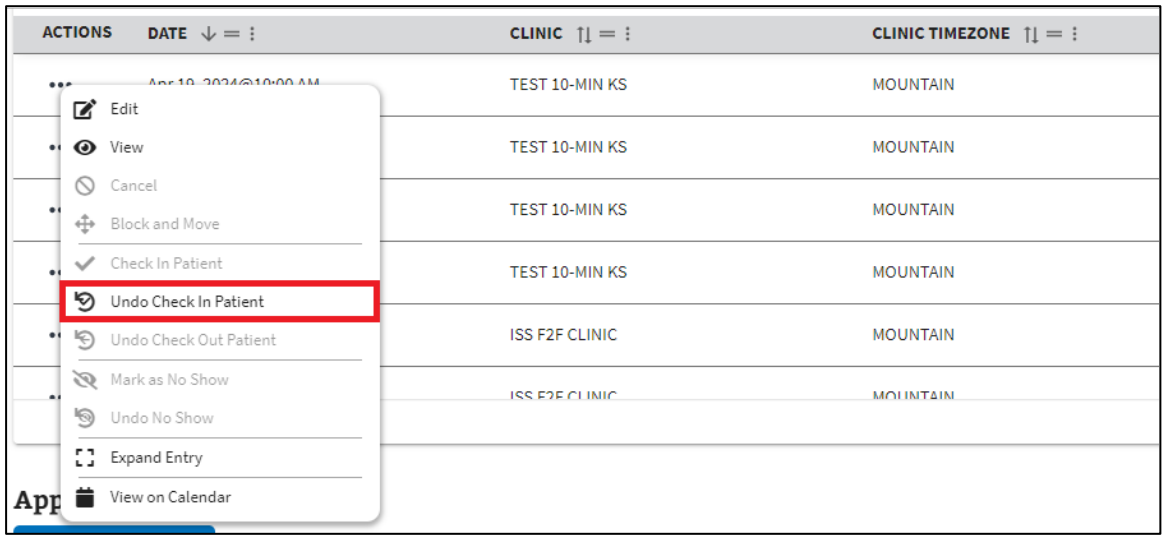


Figure 208: Undo Check In Patient Option from the Pending Appointments Action Menu

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 210** 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 209**, next to the appointment within the History grid under Appointments.

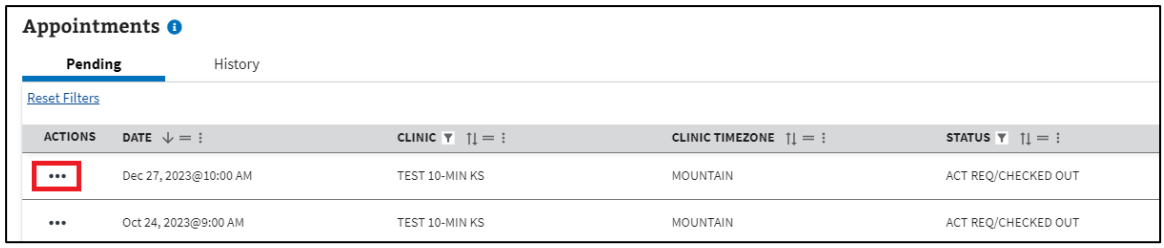


Figure 209: Action Menu Button to Undo Check Out

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 210**. This will cause the page to automatically refresh, and the appointment moved to the Pending grid where it is no longer checked out.

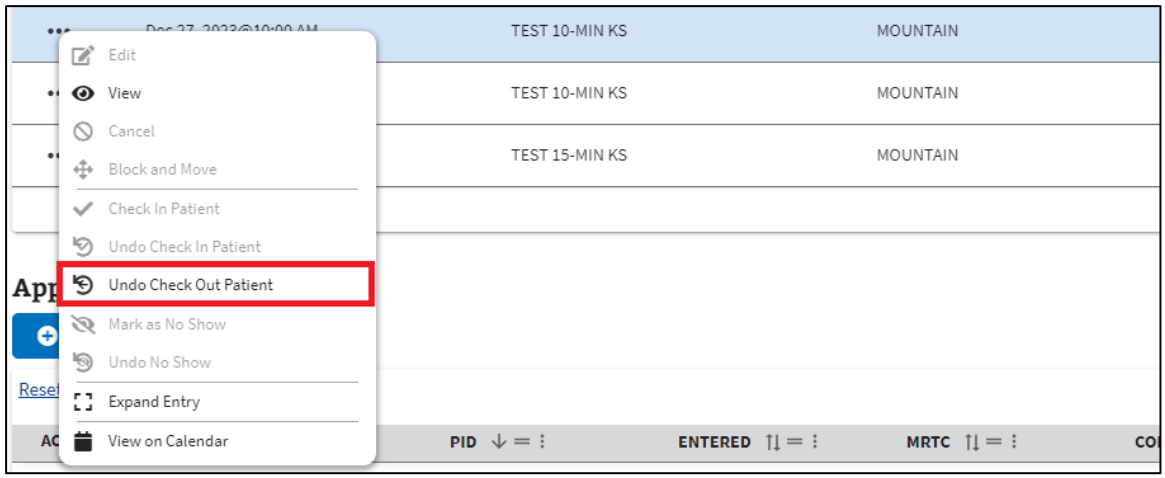


Figure 210: Undo Check Out Patient Option from the Pending Appointments Action Menu

- ❖ *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 211**, next to the appointment within the Pending grid under Appointments.

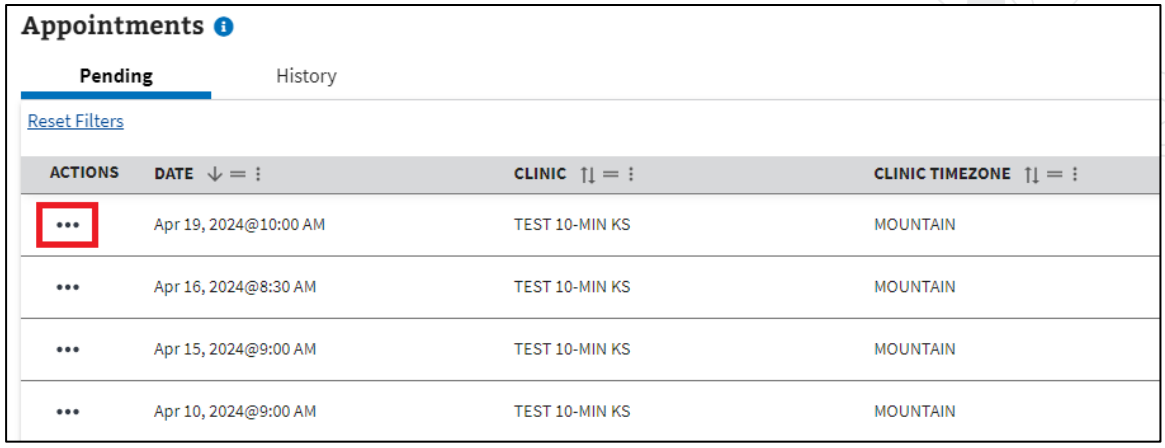


Figure 211: Action Menu Button to Mark as No Show

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 212**.

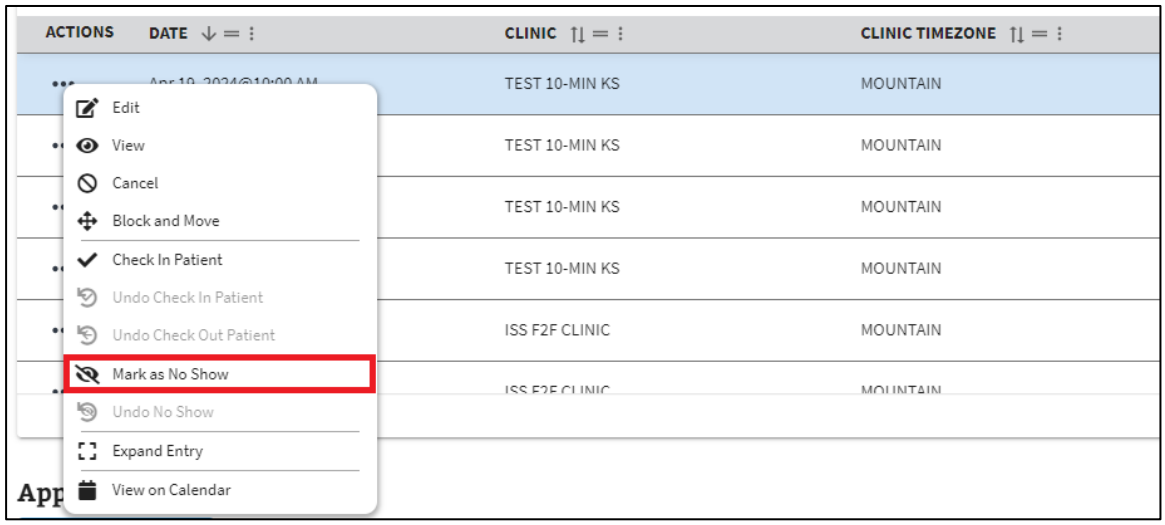


Figure 212: Mark as No Show Option from the Pending Appointment Action Menu

- ❖ *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 213**, to continue.

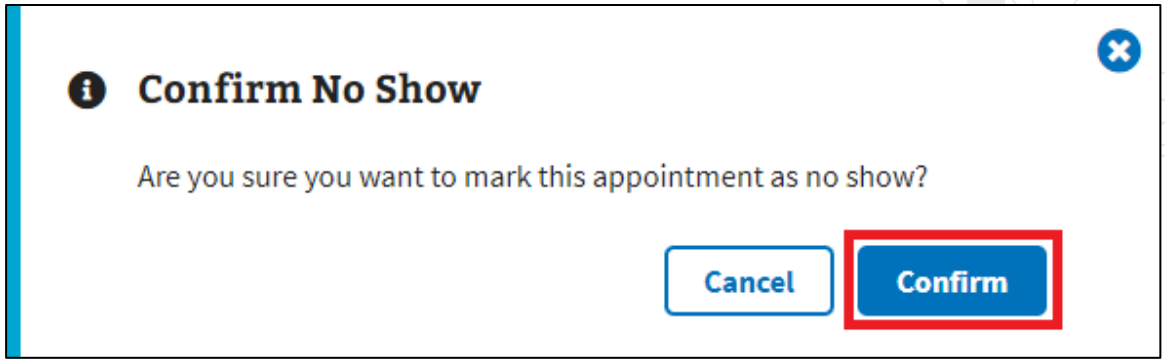


Figure 213: Confirm Button to Mark as No Show

- *Note: The user can also select the "Cancel" button seen in **Figure 213** 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 214**, will appear. The user can choose to preview the no show letter, if needed, or select "Cancel" to continue.



Figure 214: 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 215**, next to the appointment within the History grid under Appointments.

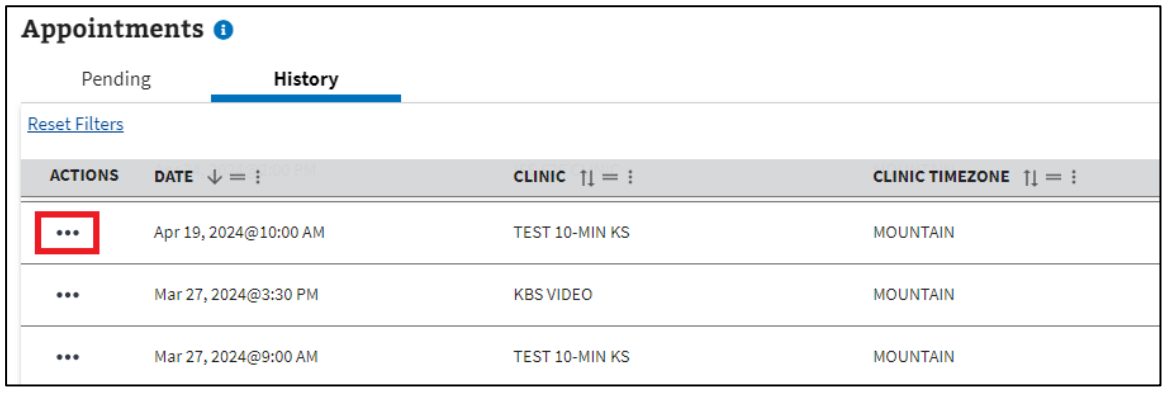


Figure 215: Action Menu Button to Undo No Show

2. This will cause the action menu to appear. The user will then need to select the "Undo No Show" option, seen in **Figure 216**. 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.

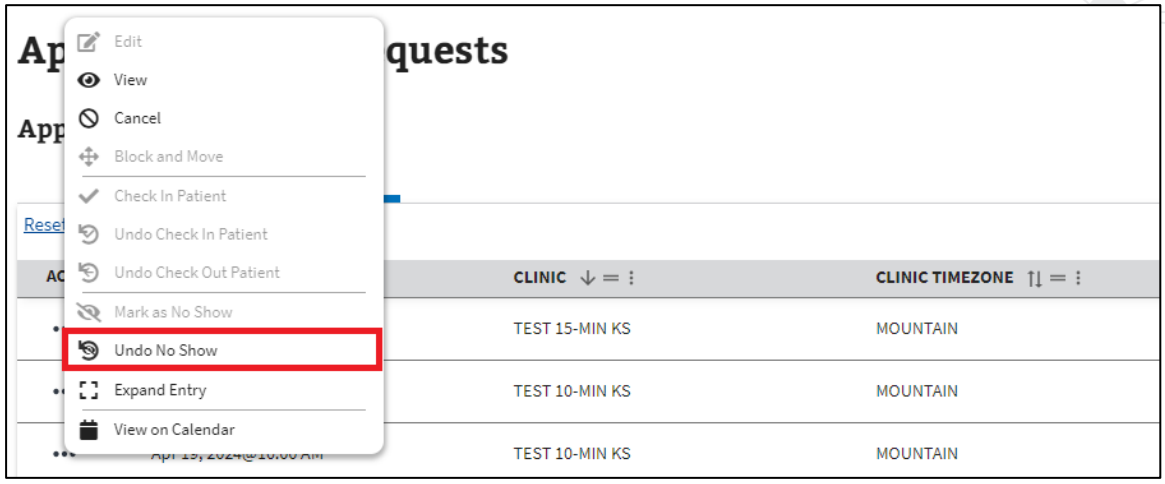


Figure 216: Undo No Show Option from the Pending Appointments Action Menu

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 217**, next to the appointment within the Pending grid.

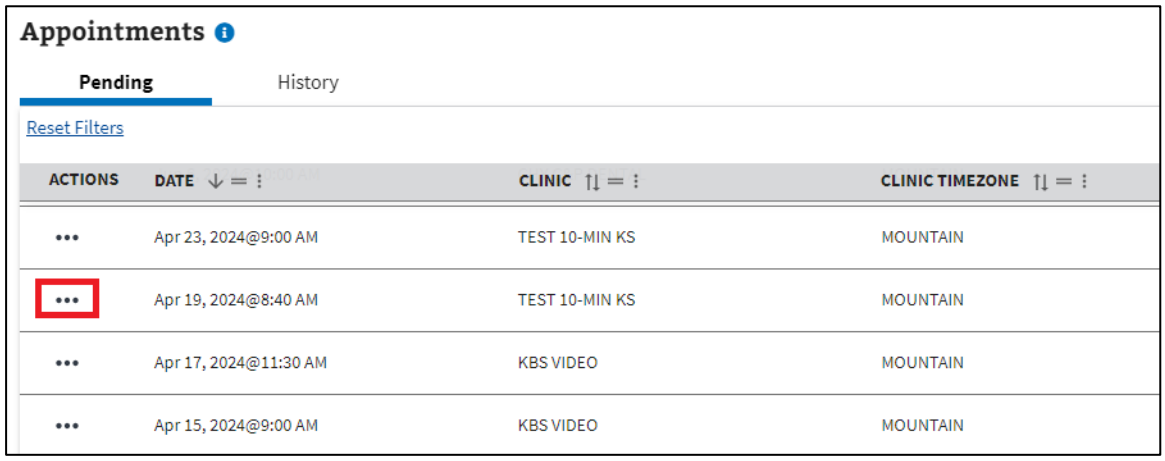


Figure 217: Action Menu Button to View on Calendar

2. This will cause the action menu to appear. The user will then need to select the "View on Calendar" option, seen in **Figure 218**.

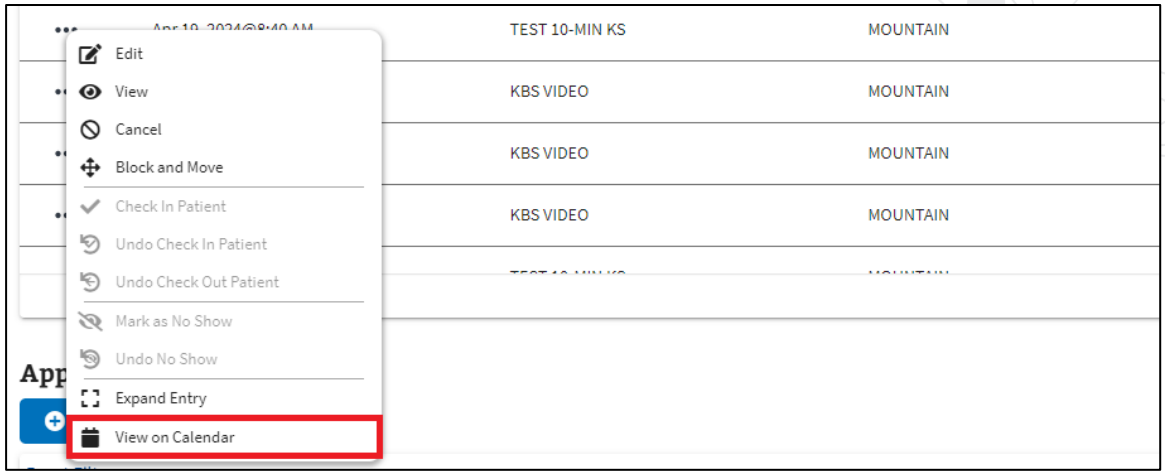


Figure 218: View on Calendar Option from the Pending Appointments Action Menu

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 219**.

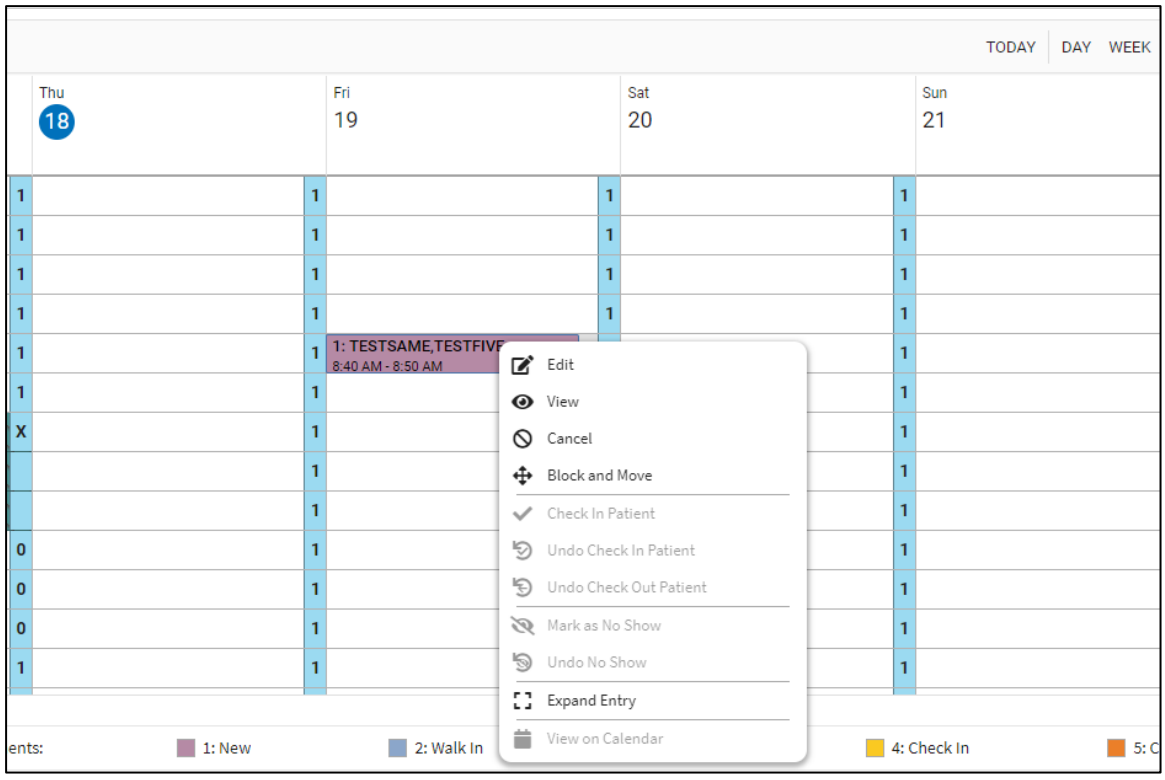


Figure 219: Action Menu from Calendar View

- ❖ *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 220**.)

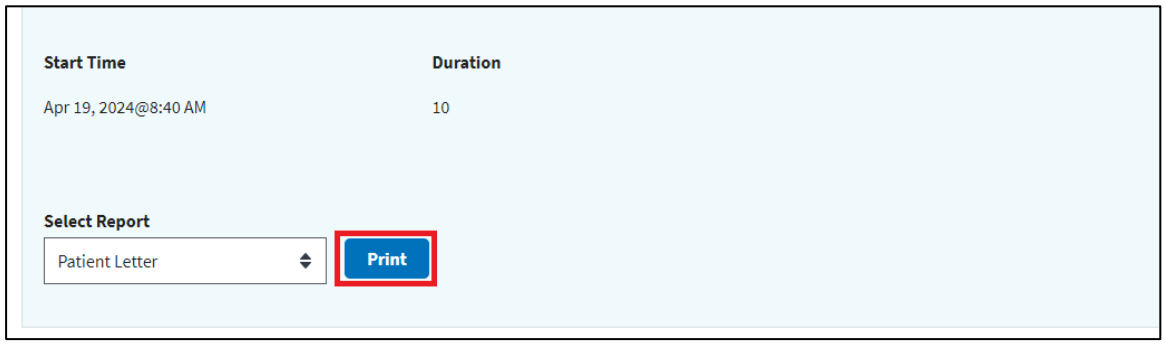


Figure 220: Print Button for Letter Printing

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 221.**

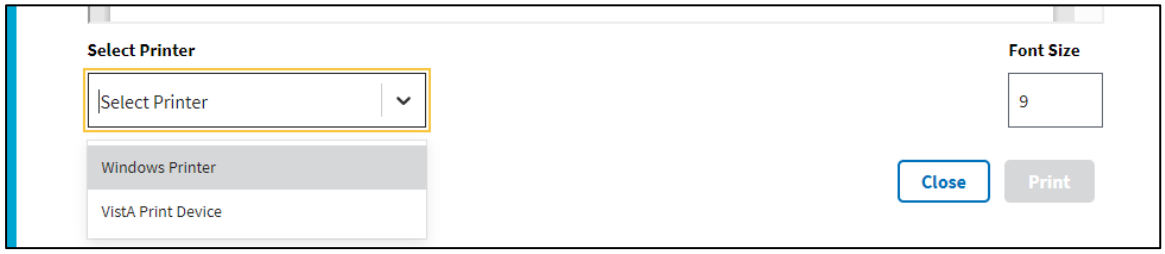


Figure 221: Printer Options Dropdown

- *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 222**, before the print button becomes available to select.*

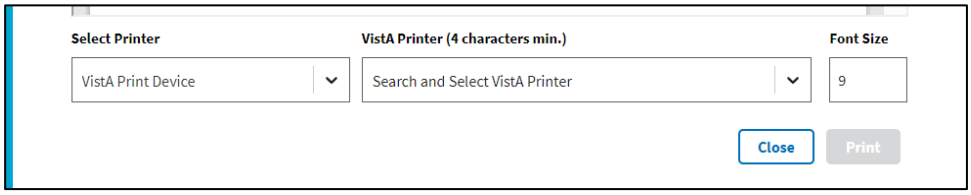


Figure 222: VistA Print Option

2. After choosing a printer from the dropdown seen in **Figure 221**, the print button will become available to select, as seen in **Figure 223**. Selecting this will bring the user to the print preview screen.

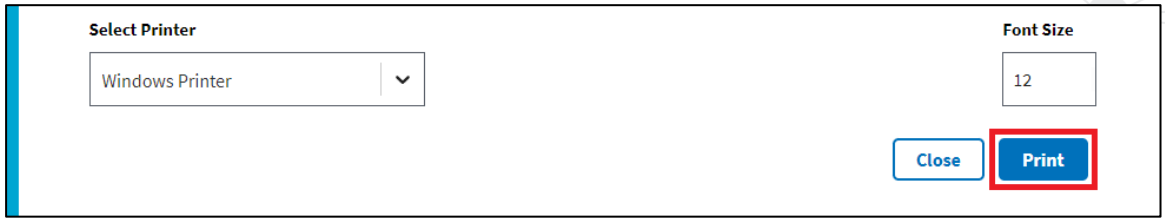


Figure 223: Print Button from Patient Appointment Letter Window

- ❖ *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 224**, or select the arrows to increase/decrease the size.*



Figure 224: 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 225**, to continue.

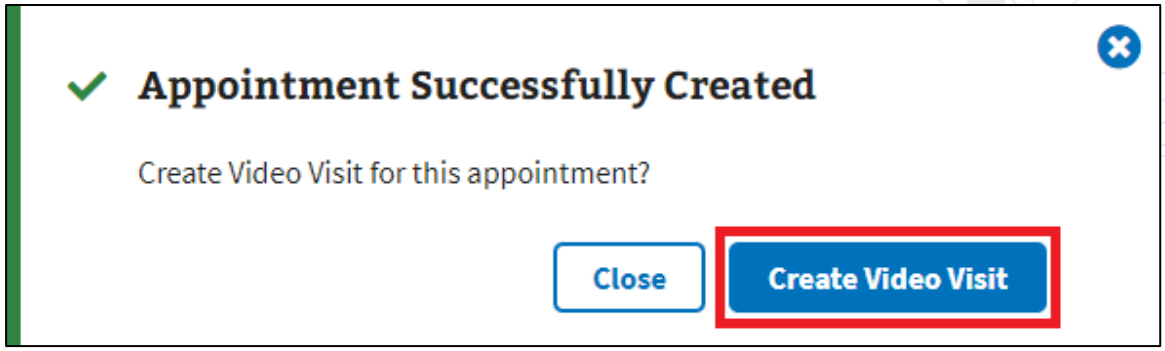


Figure 225: Create Video Visit Button from Creation Window

3. The Confirm Patient Contact window will appear. The user will need to select the "OK" button, seen in **Figure 226**, to continue to the New Video Visit page.



Figure 226: 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 227**. The user can also fill out any optional information as needed.

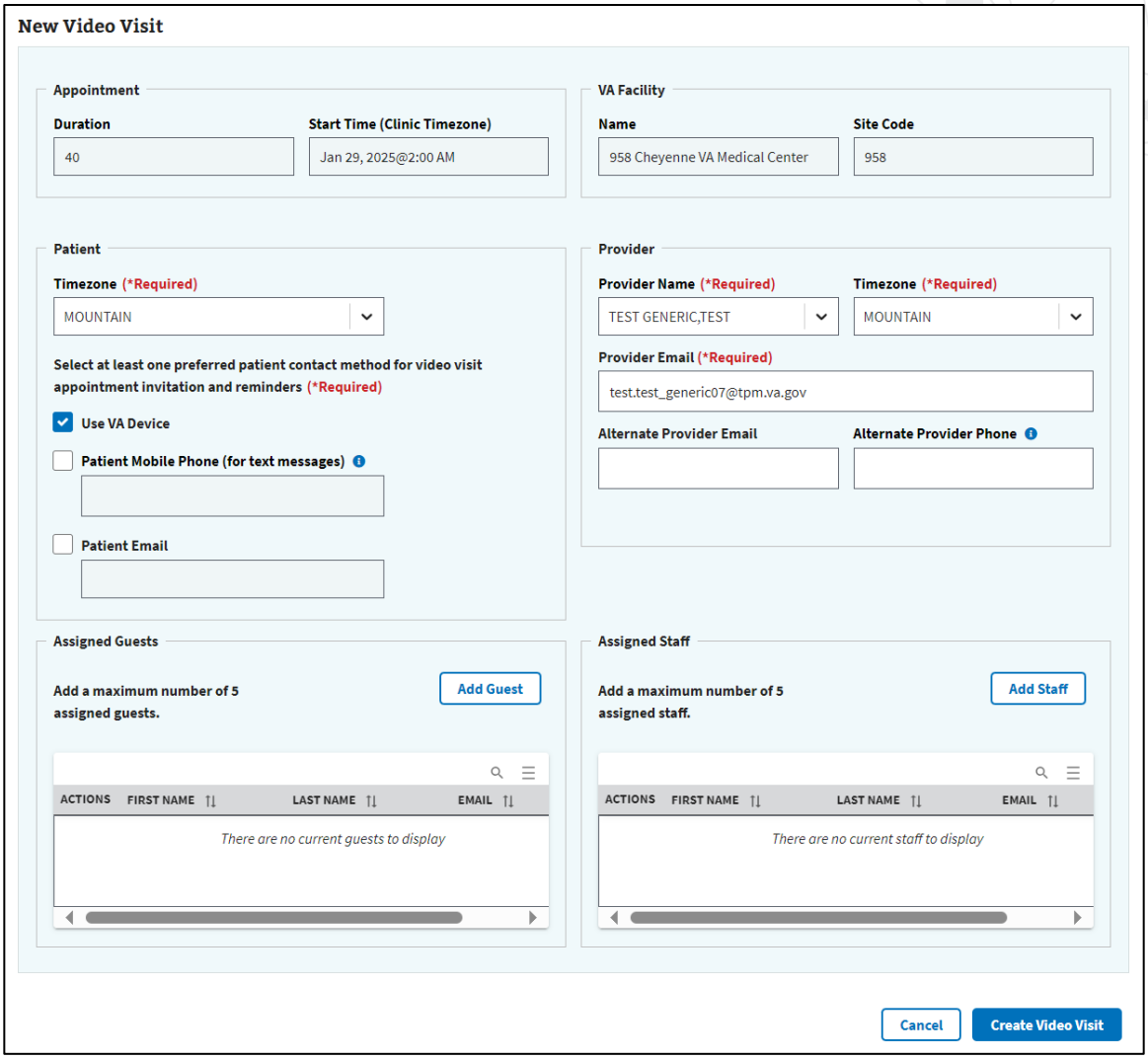


Figure 227: New Video Visit Page

- *Note: Users with VA-issued devices will have an additional check box as seen in **Figure 228** 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.*

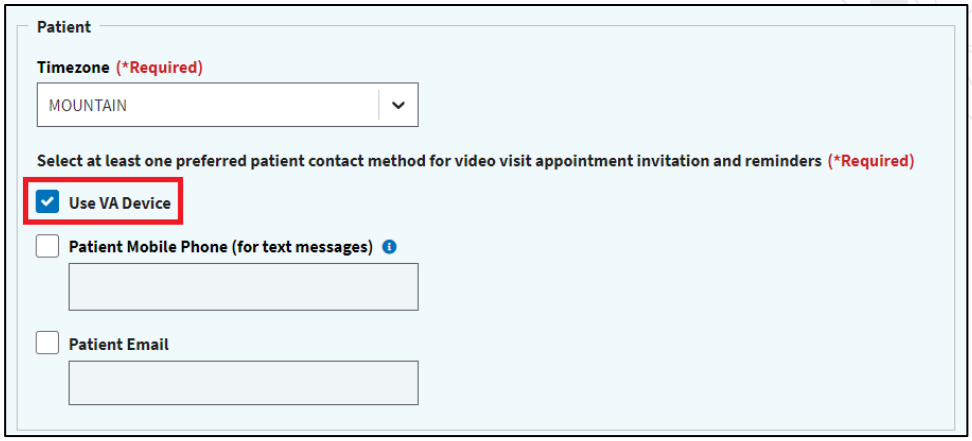


Figure 228: VA-issued Device Selection for Video Visit

5. Once all applicable information has been filled, the user will then select the "Create Video Visit" button, seen in **Figure 229**, to create the video visit. The user will have the option to preview a patient letter, if needed.

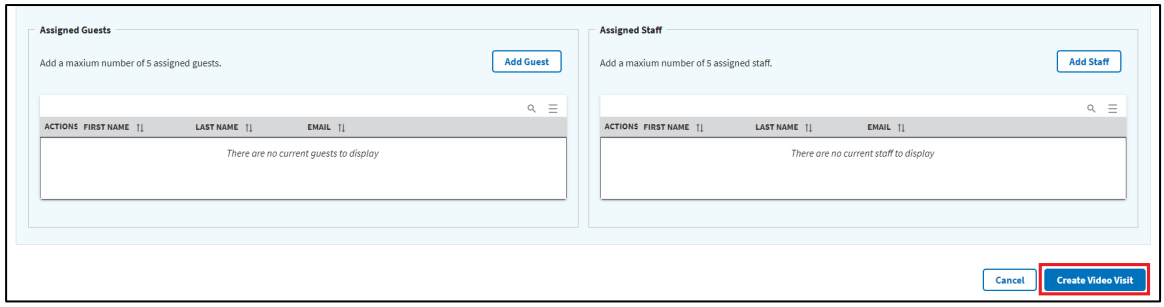


Figure 229: Create Video Visit Button when Creating Video Visit

4.5.2 Viewing Video Visits

1. To view a video visit, the user can select the ellipsis, seen in **Figure 230**, next to the appointment within the Pending grid under Appointments.

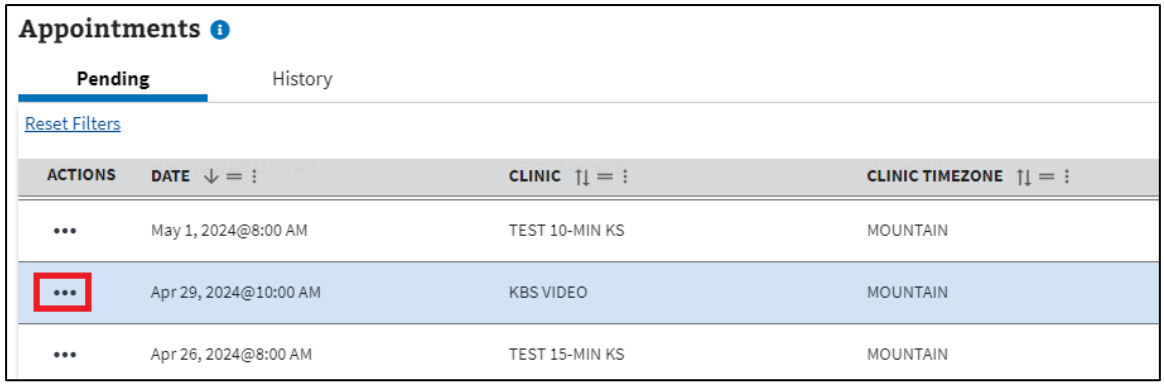


Figure 230: Action Menu Button to View Video Visits

2. This will cause the action menu to appear. The user will then need to select the “View” option, seen in **Figure 231**.

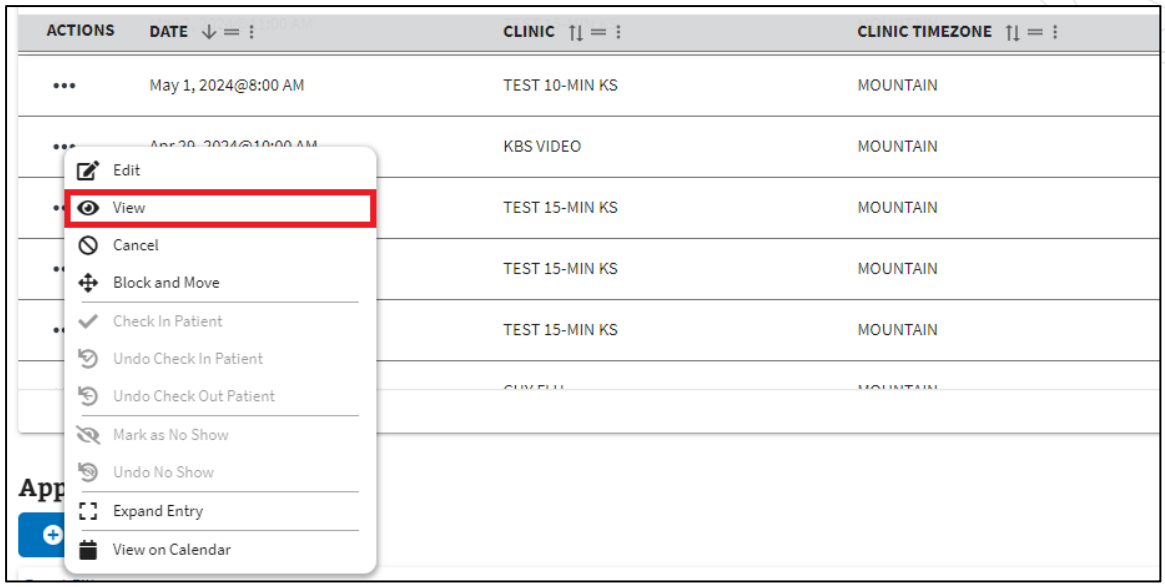


Figure 231: View Option for Video Visits from the Pending Appointments Action Menu

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 232**, to continue to the View Video Visit page.

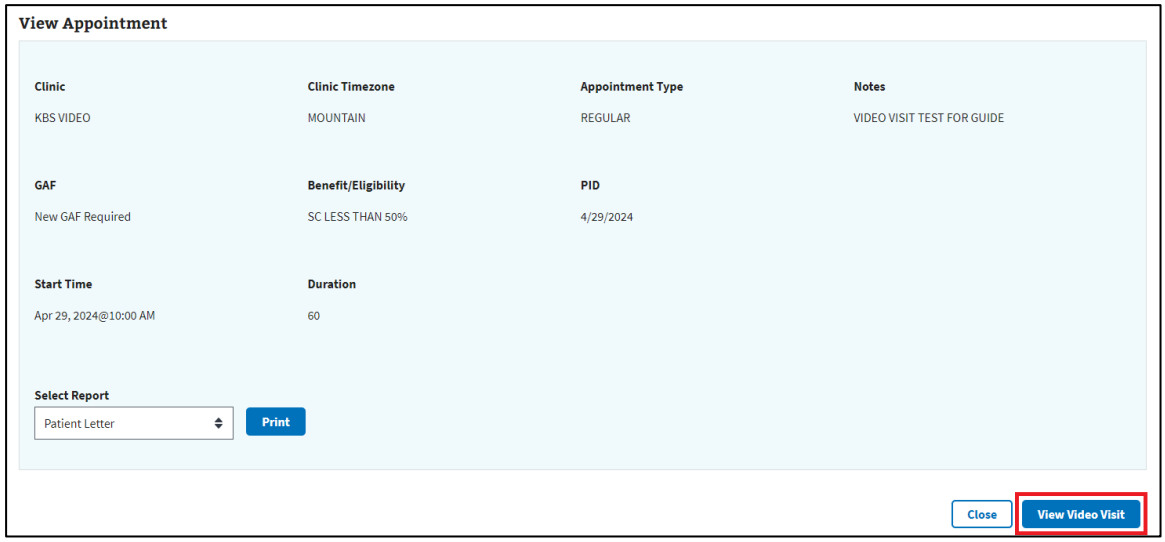


Figure 232: View Video Visit Button

4.5.3 Editing Video Visits

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

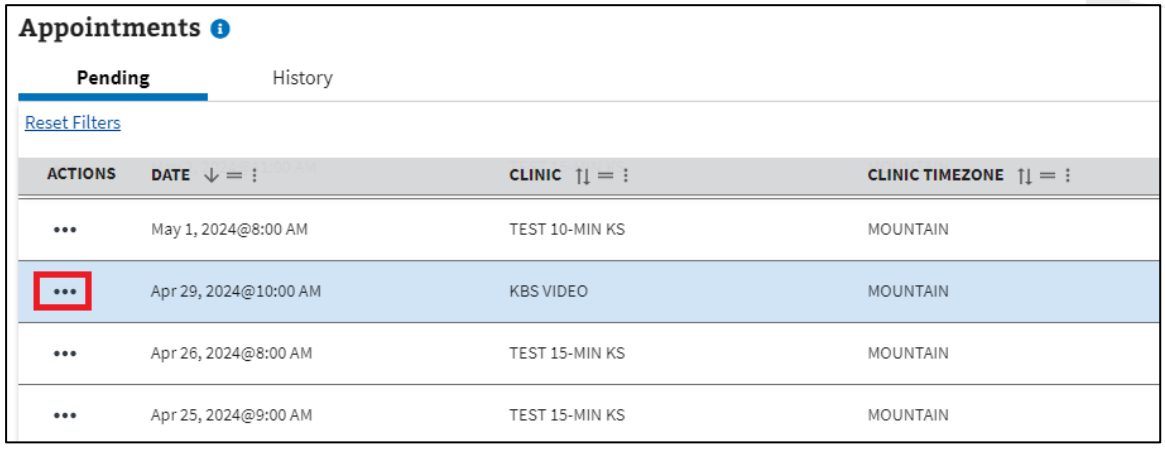


Figure 233: Action Menu Button to Edit Video Visits

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

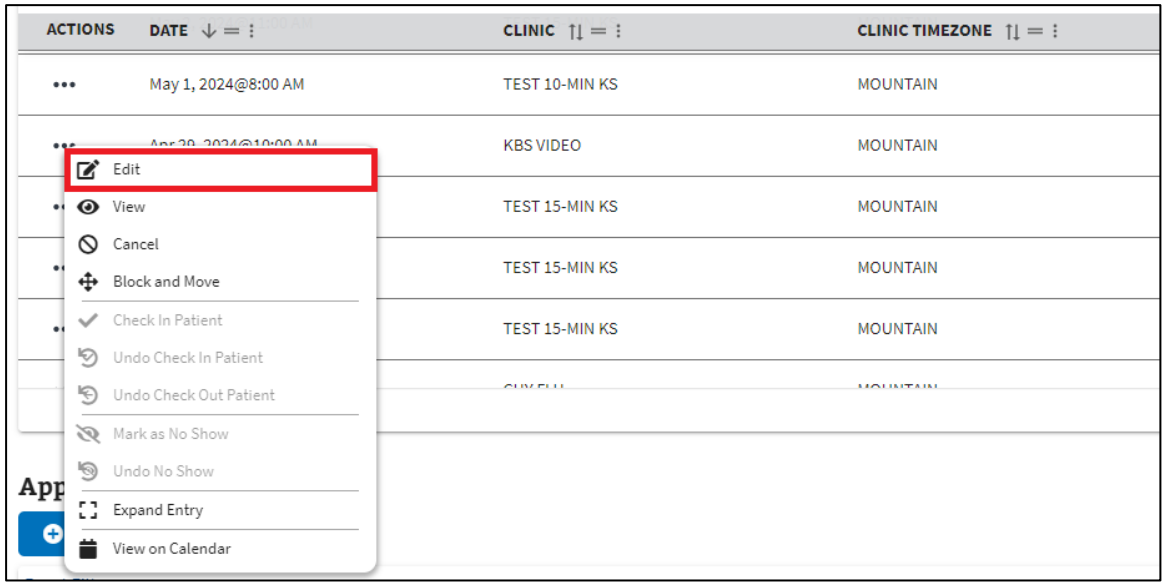


Figure 234: Edit Option for Video Visits from the Pending Appointments Action Menu

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 235**, to continue to the Edit Video Visit page.

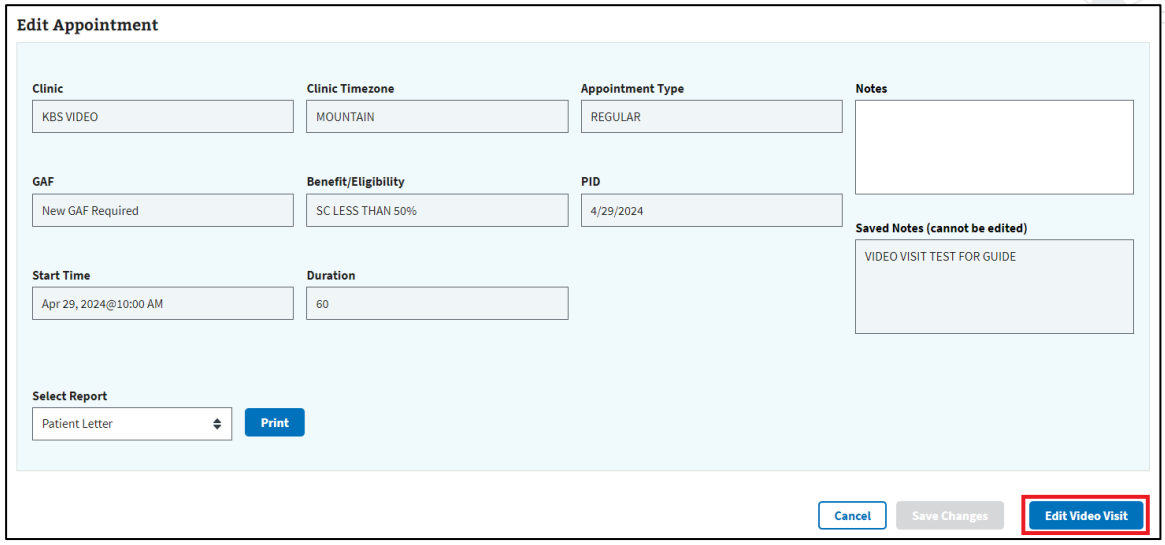


Figure 235: Edit Video Visits Button

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 236**, to save the edits.

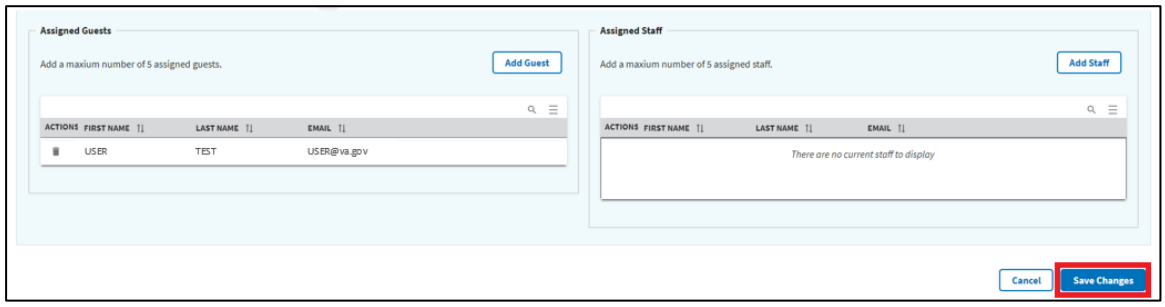


Figure 236: Save Changes Button on the Video Visits Page

4.5.4 Resending Video Visits

1. To resend video visit notifications, the user will select the ellipsis, seen in **Figure 237**, next to the appointment within the Pending grid under Appointments.

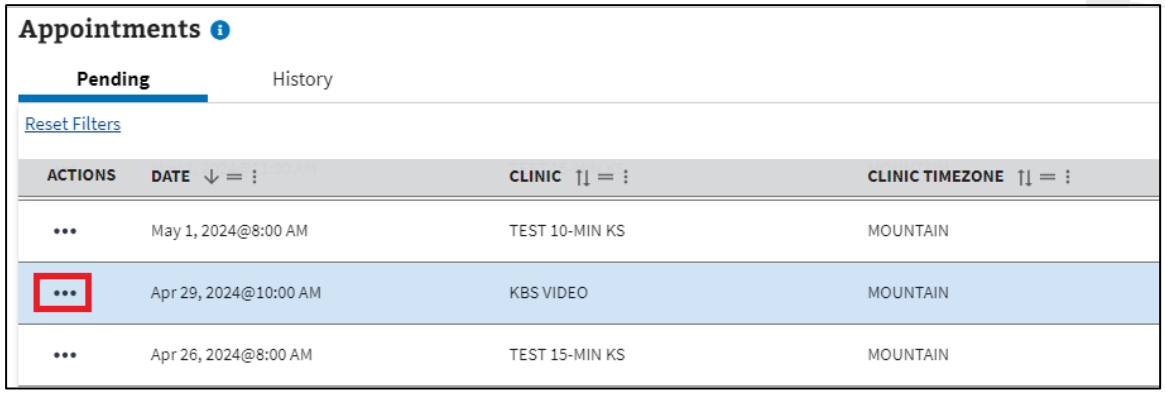


Figure 237: Action Menu Button to Resend Video Visits

2. This will cause the action menu to appear. The user will then need to select the "View" option, seen in **Figure 238**.

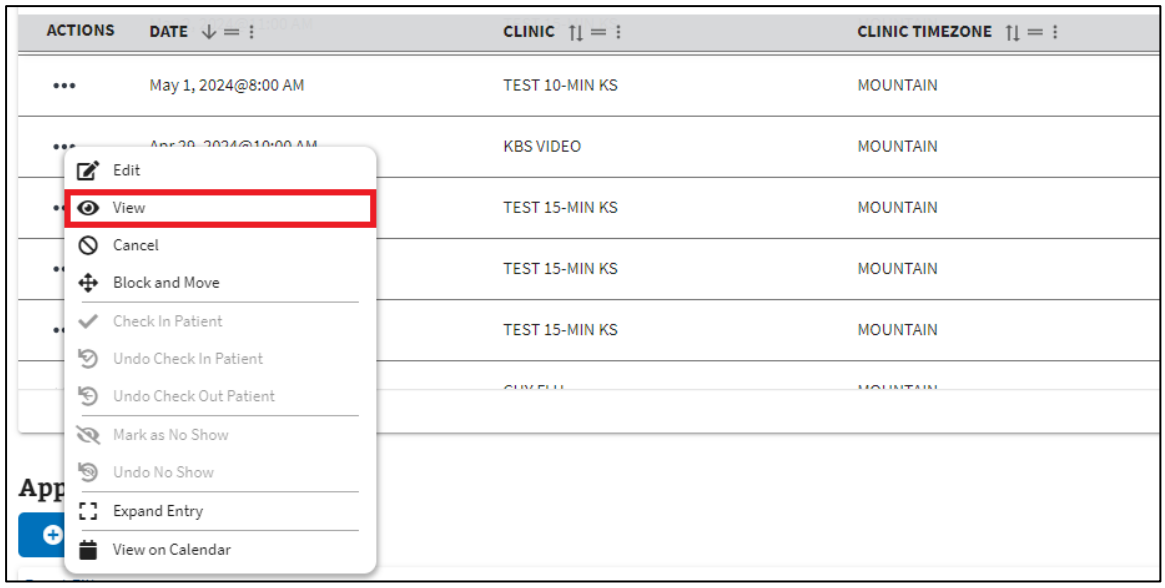


Figure 238: View Option for Resending Video Visits from the Pending Appointments Action Menu

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 239**, to continue to the View Video Visit page.

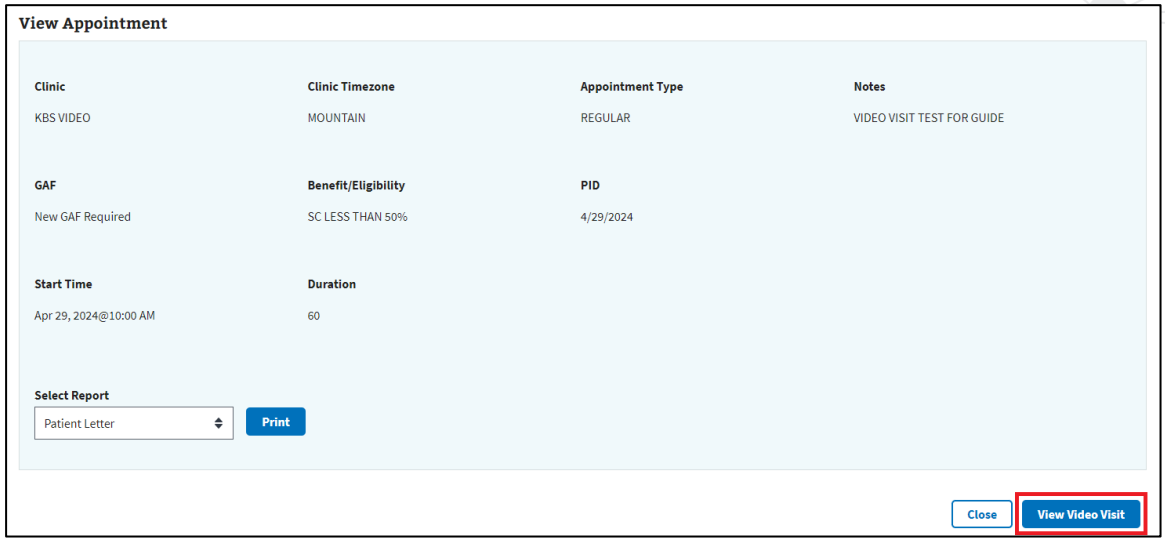


Figure 239: View Video Visits Button to Resend Visit

4. On the View Video Visit page, the user can select the "Resend Video Visit Notifications" button, seen in **Figure 240**, to resend the video visit notification to all attending parties.

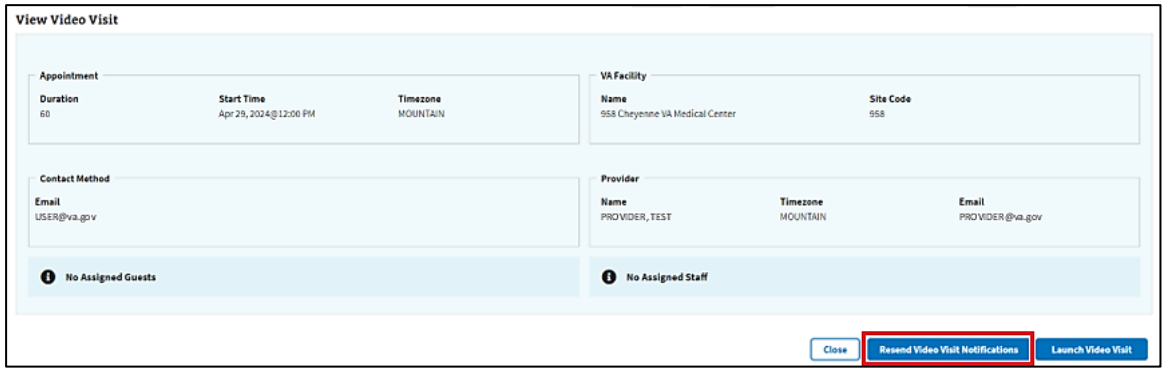


Figure 240: Resend Video Visit Notification Button

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 241**, next to the appointment within the Pending grid under Appointments.

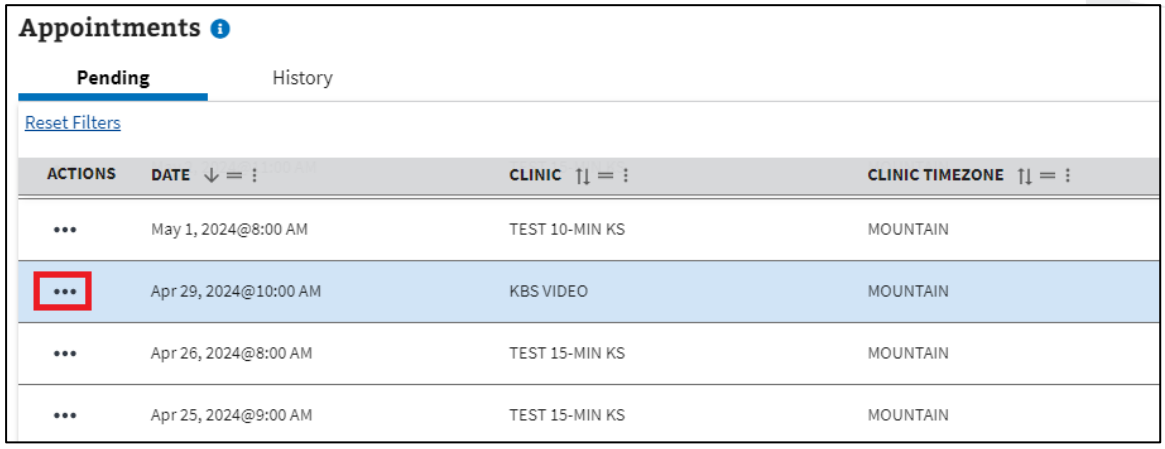


Figure 241: Action Menu Button to Launch Video Visits

2. This will cause the action menu to appear. The user will then need to select the "View" option, seen in **Figure 242**.

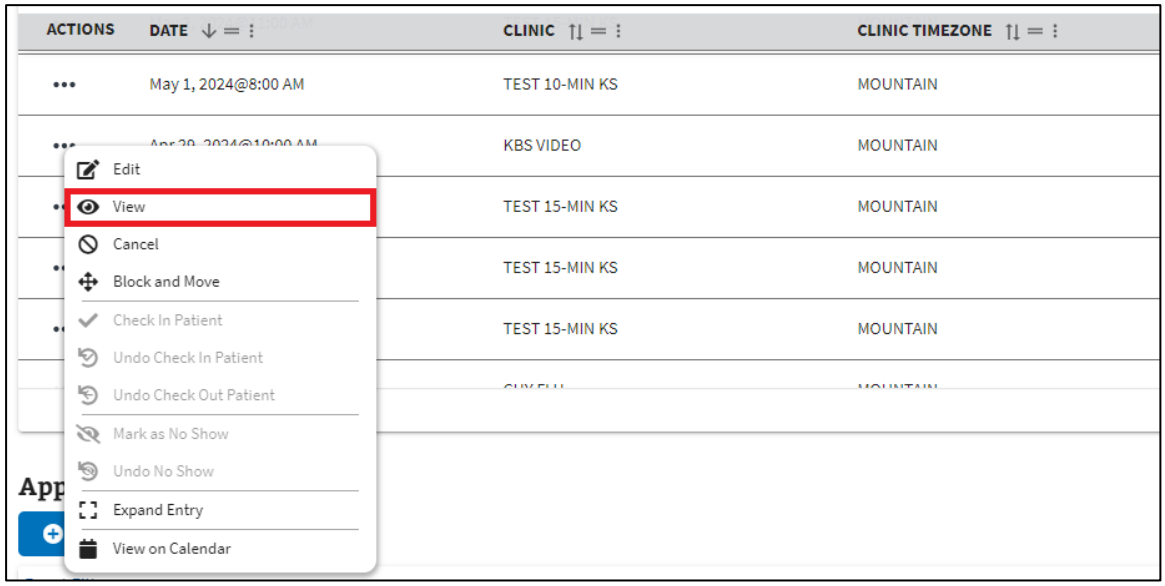


Figure 242: View Option for Launching Video Visits from the Pending Appointments Action Menu

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 243**, to continue to the View Video Visit page.

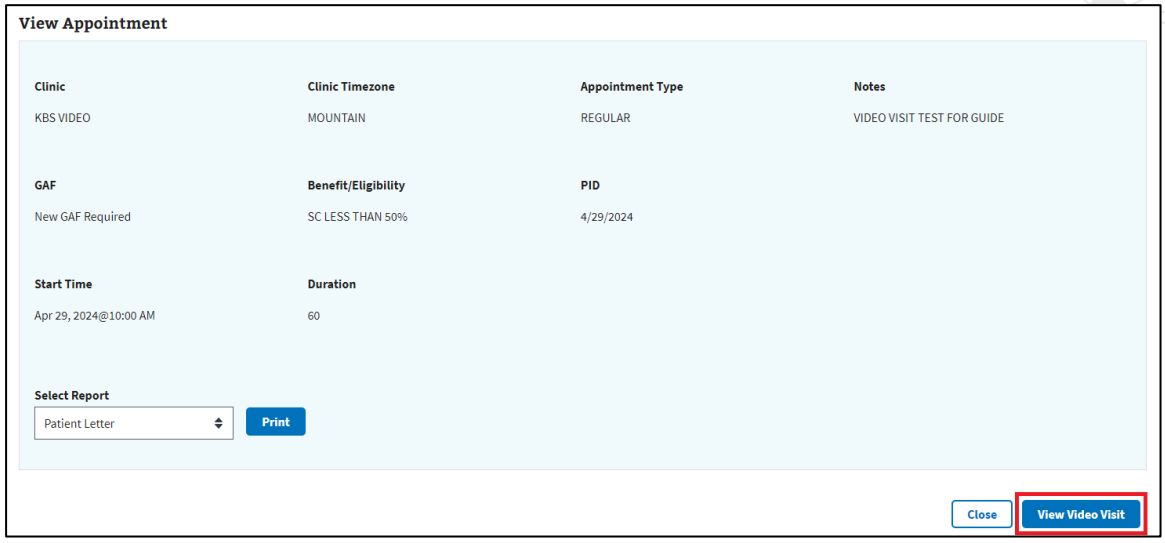


Figure 243: View Video Visits Button for Launching Visit

4. On the View Video Visit page, the user will need to select the “Launch Video Visit” button, seen in **Figure 244**, to launch the video visit. This will redirect the user to an external website where the video visit will be conducted.

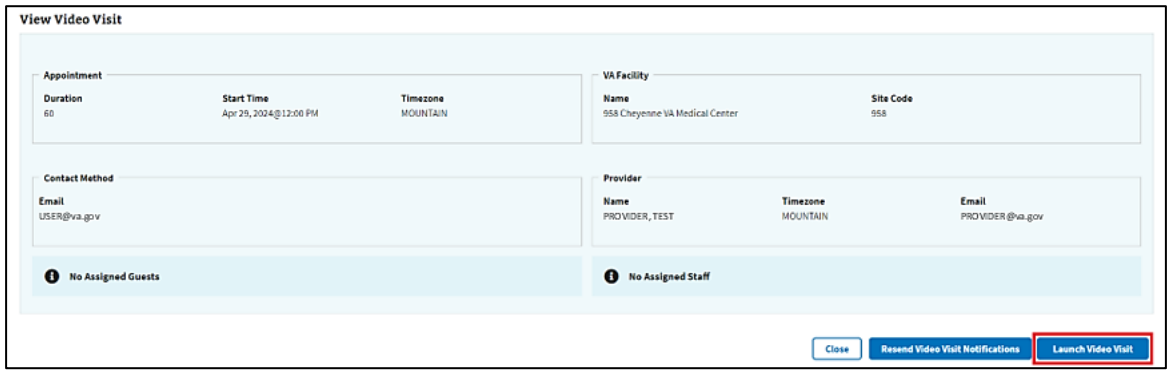


Figure 244: Launch Video Visit Button

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 245**.

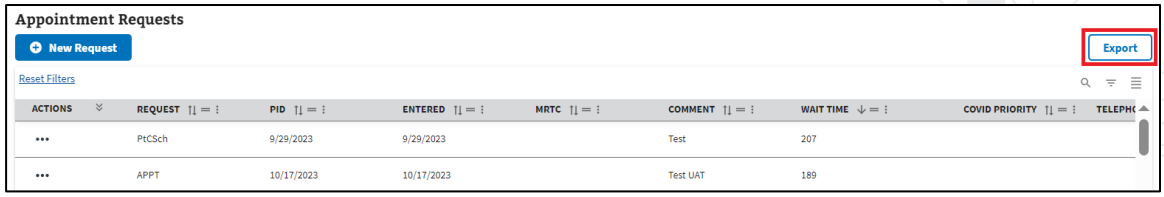


Figure 245: Export Button for Appointment Requests

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 246**.

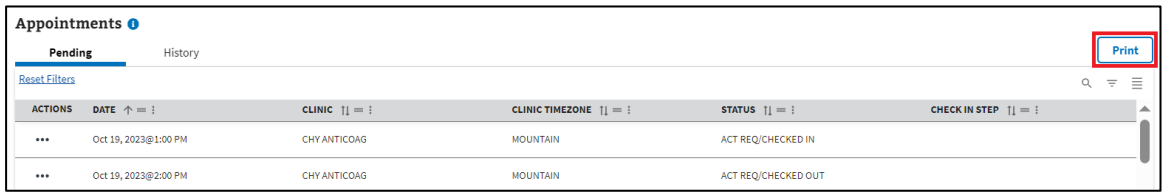


Figure 246: Print Button for Appointment List Options

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 247**.

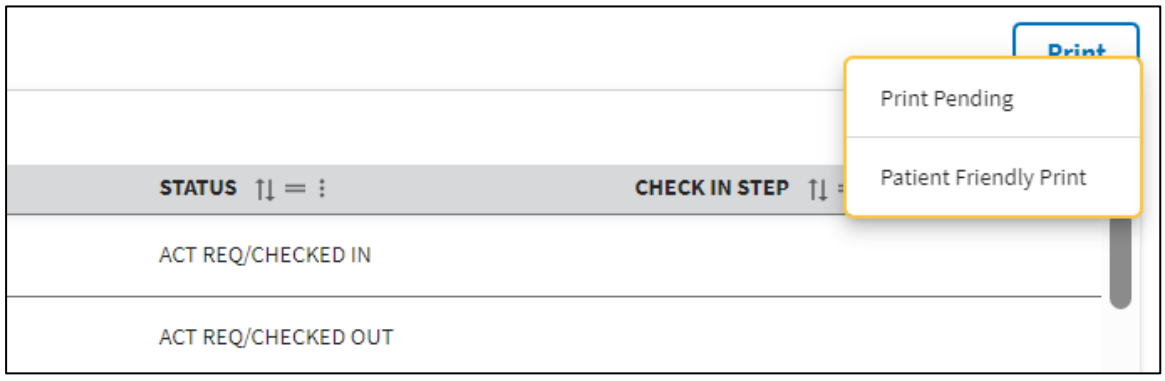


Figure 247: Appointment Print Options

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 248**, and enter a valid clinic name. Once the information has been entered, a list of clinics will appear in the dropdown.

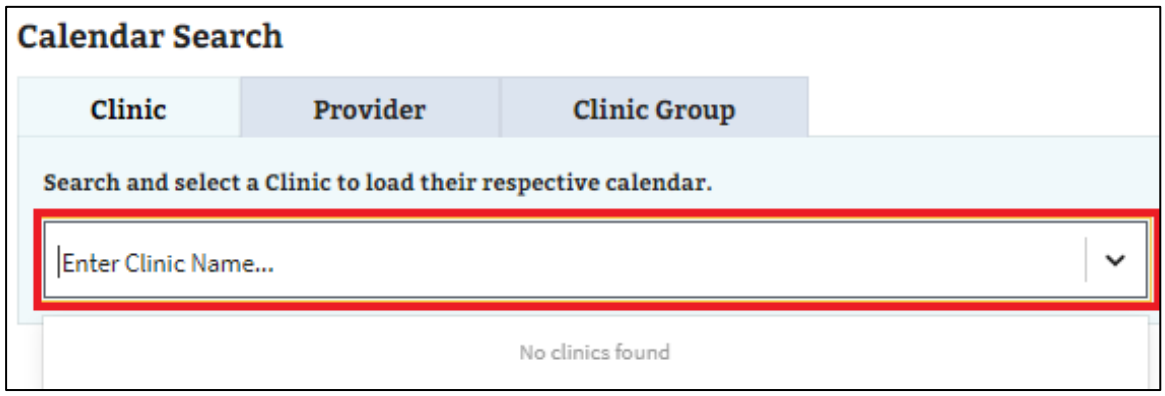


Figure 248: Search Bar for Clinic Search

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 249**. On this page, the user is able to view available timeslots within the clinic.

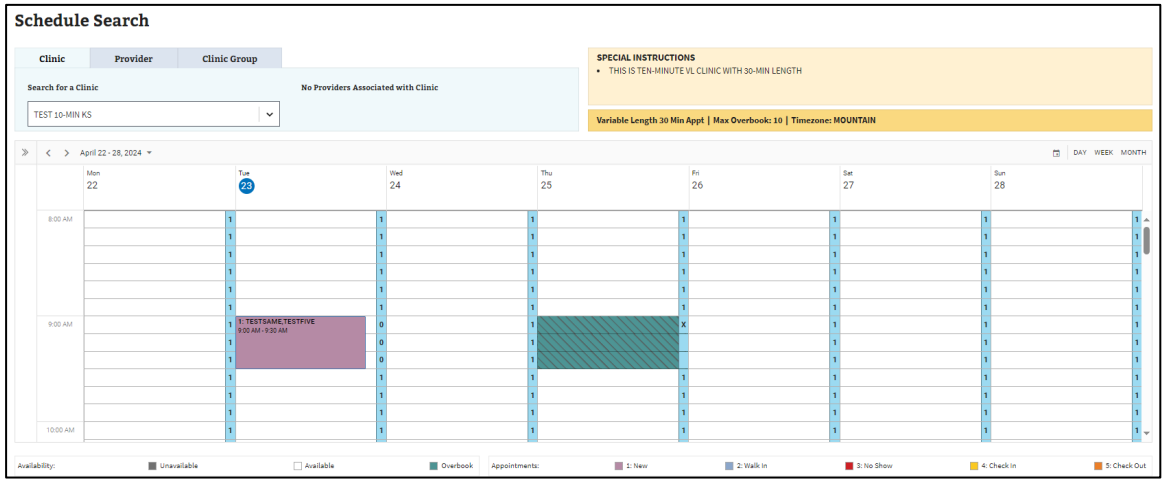


Figure 249: Clinic Calendar Example

5.2 Provider Search

1. To search for a provider, the user will first need to select the “Provider” tab shown in **Figure 250**.

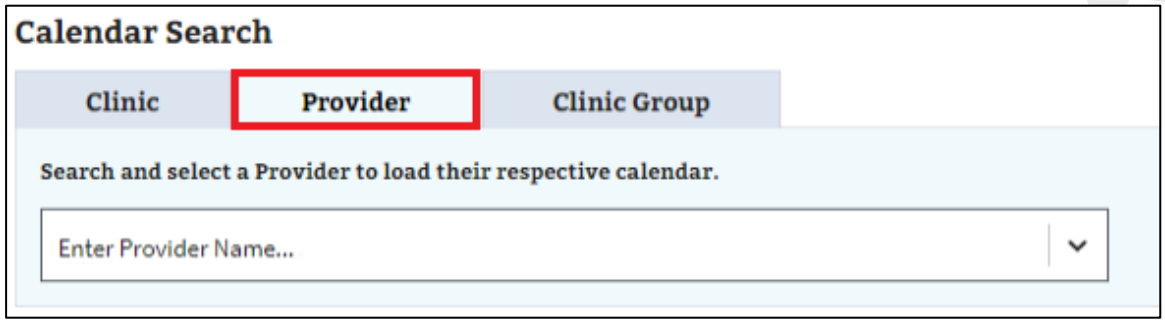


Figure 250: Provider Tab

2. The user will then select the search bar, seen in **Figure 251**, and enter a valid provider name. Once the information has been entered, a list of providers will appear in the dropdown.



Figure 251: 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 252**.

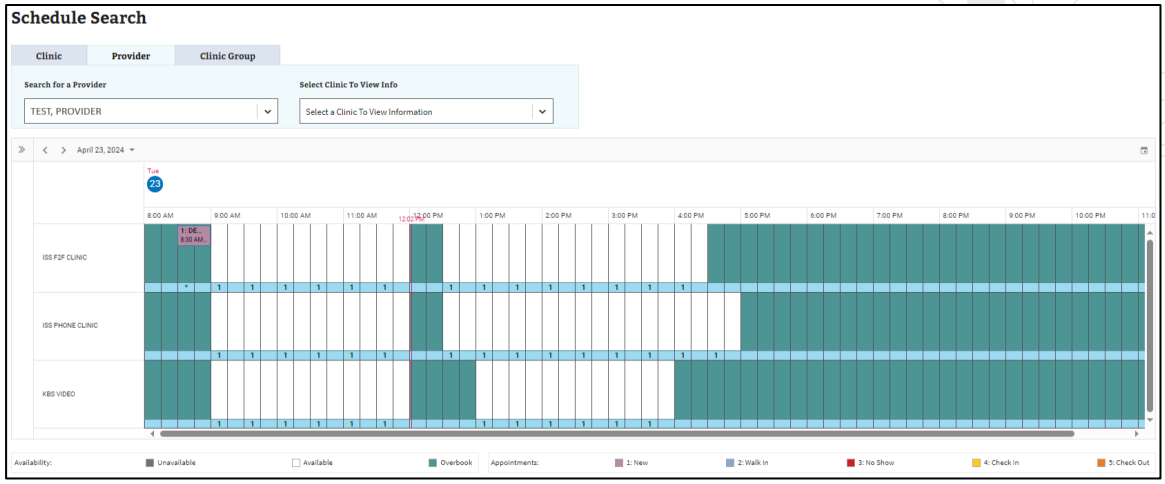


Figure 252: Provider Calendar Example

- ***Note: The user is able to view information about a clinic by selecting a clinic within the dropdown shown in* Figure 253.**

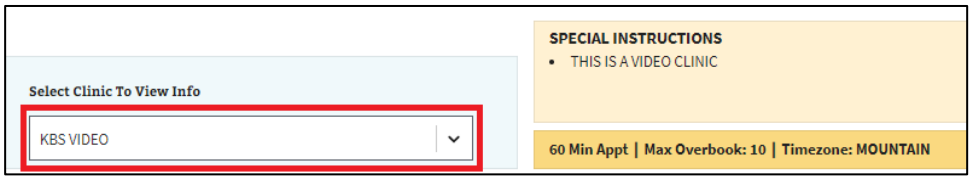


Figure 253: Dropdown to Select a Clinic for Information on Provider Calendar

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 254**.

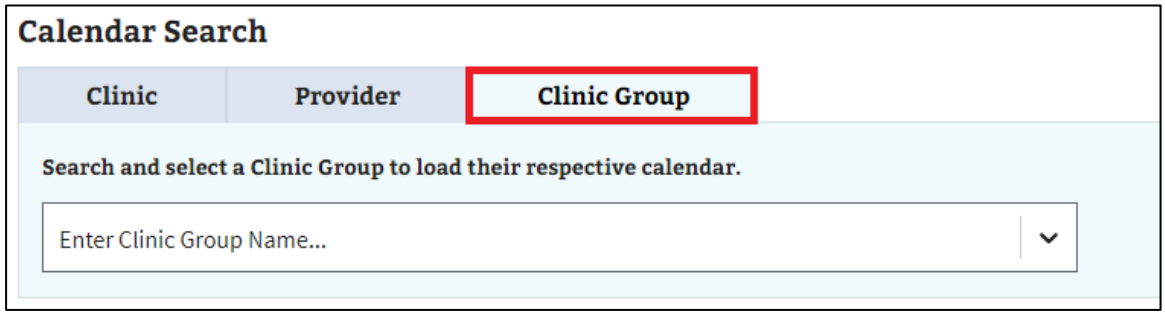


Figure 254: Clinic Group Tab

2. The user will then select the search bar, seen in **Figure 255**, and enter a valid clinic group name. Once the information has been entered, a list of clinic groups will appear in the dropdown.

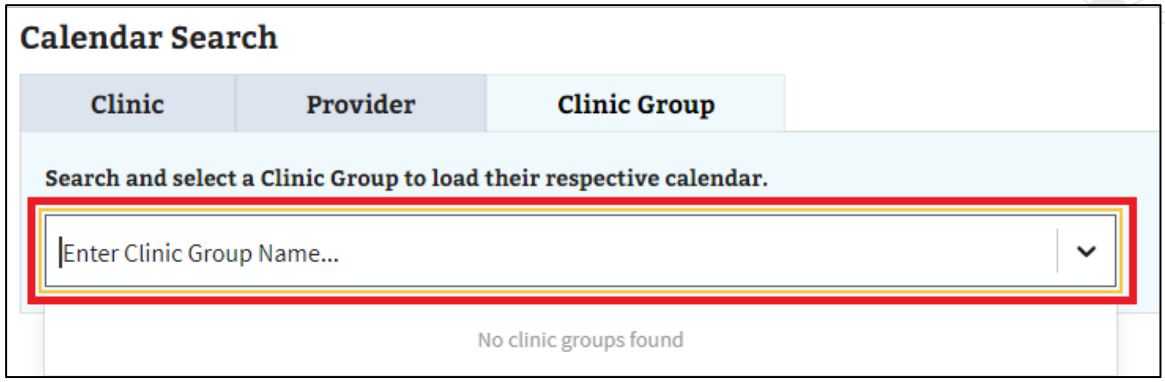


Figure 255: Clinic Group Search Bar

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 256**, for the selected clinic group. On this page, the user is able to view available timeslots from entities associated with the clinic group.

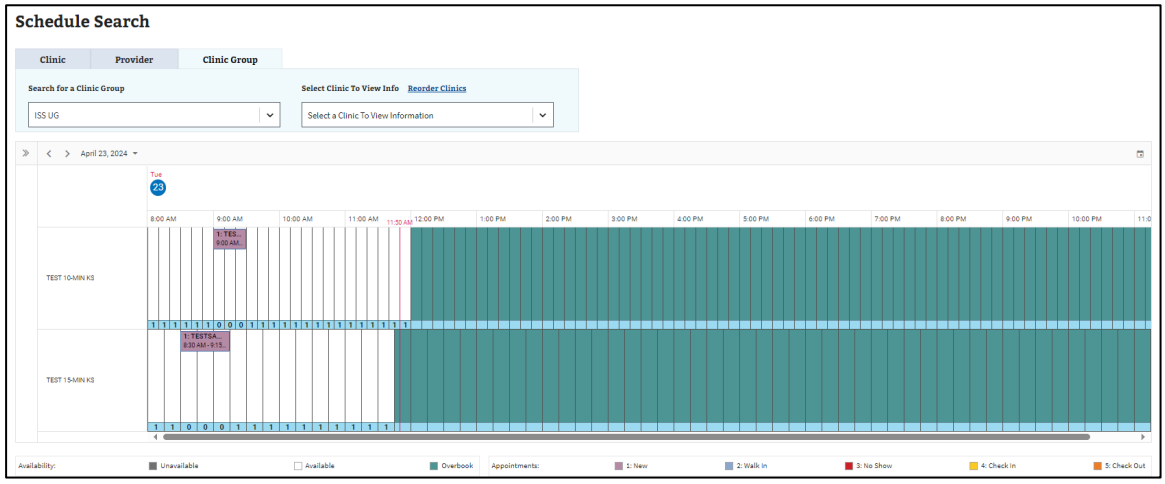


Figure 256: Clinic Group Calendar Example

- *Note: The user is able to view information about a clinic by selecting a clinic within the dropdown shown in **Figure 257**.*

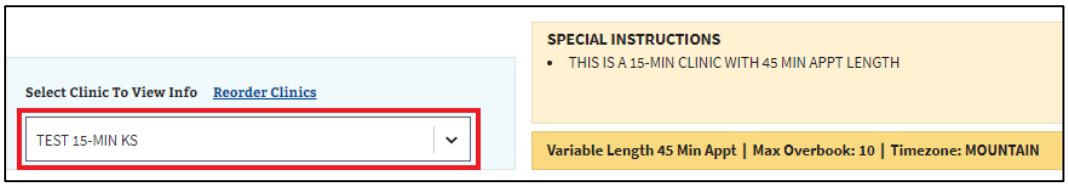


Figure 257: Dropdown to Select a Clinic for Information on Clinic Group Calendar

❖ *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 258**, then drag and drop the clinics into their preferred order. Once completed, the user will need to select "OK" to save the changes.*

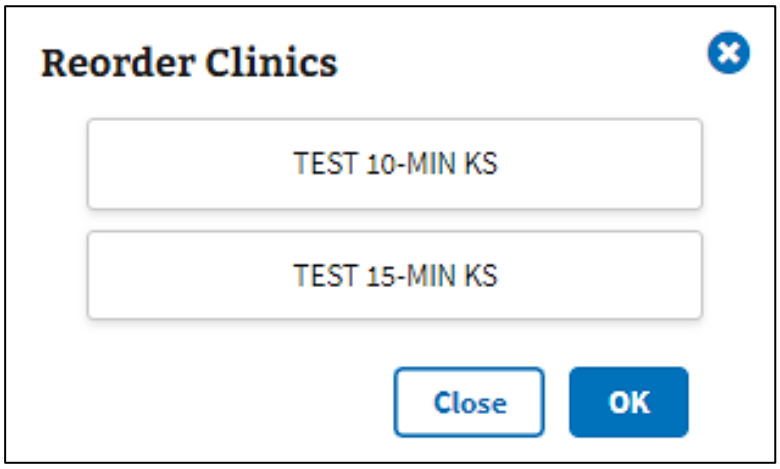


Figure 258: Reorder Clinics Window

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 259**.

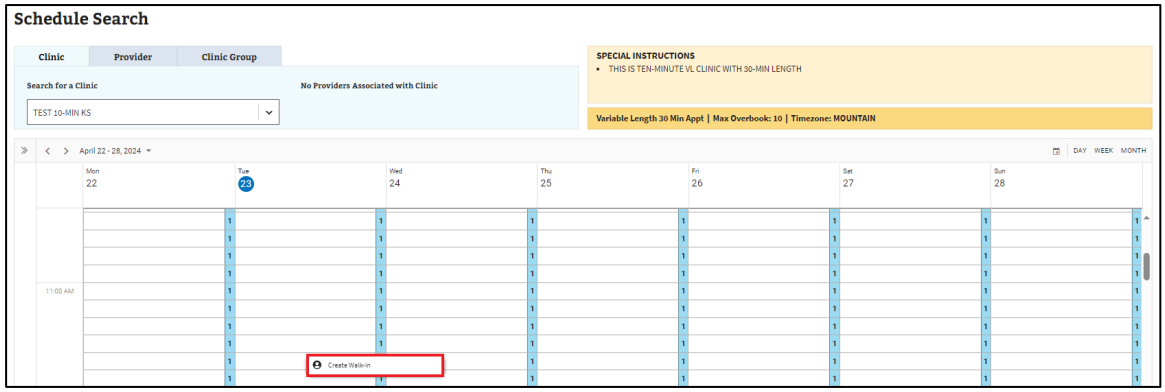


Figure 259: Create Walk-in Button on Calendar

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 260**. The user can also fill out any optional information as needed.

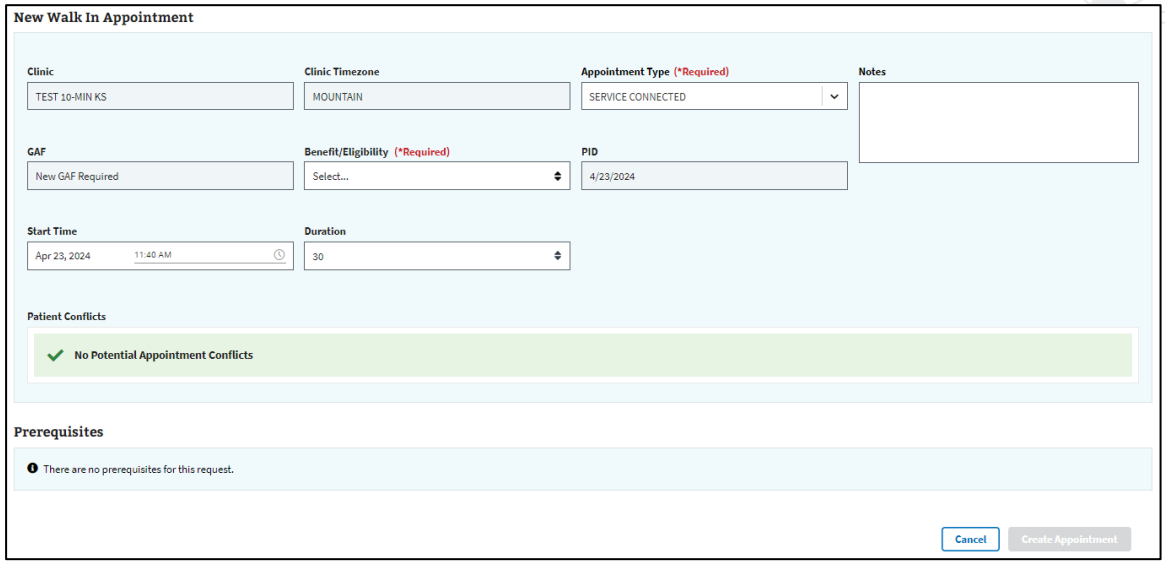


Figure 260: New Walk- in Appointment Page

4. Once all applicable information has been filled, the user will select the "Create Appointment" button, seen in **Figure 261**, to create the walk-in appointment.

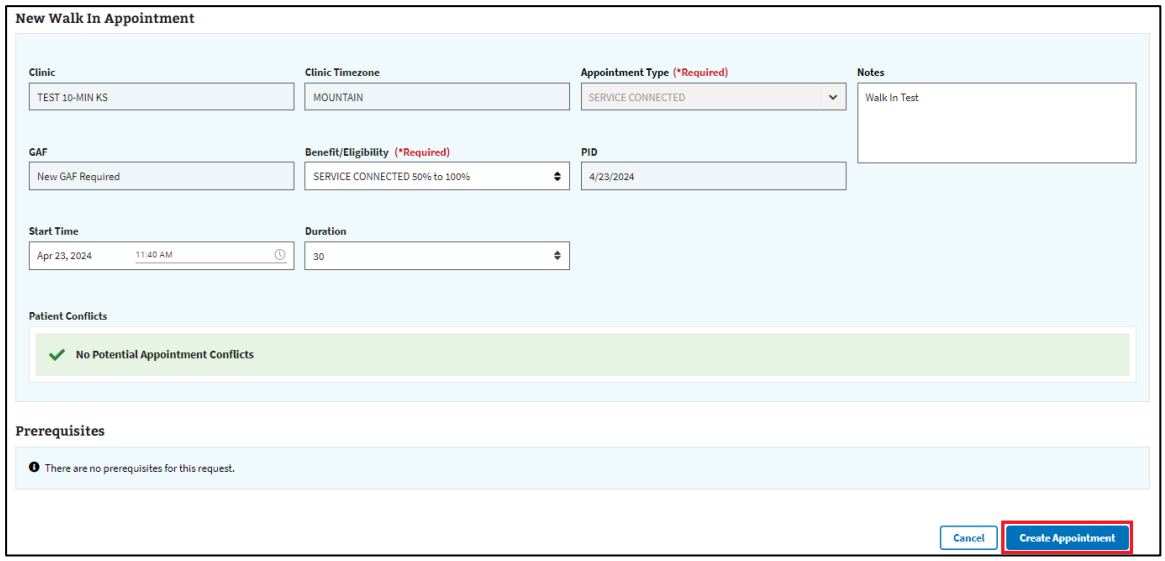


Figure 261: Create Appointment Button for New Walk-in

- *Note: The user can also select the "Cancel" button seen in **Figure 261** to exit creating an appointment and go back to the Appointments & Requests page.*

8. The Appointment Successfully Created window, shown below in **Figure 262**, will appear. The user can choose to preview the patient letter, if needed, or select “Close” to continue.

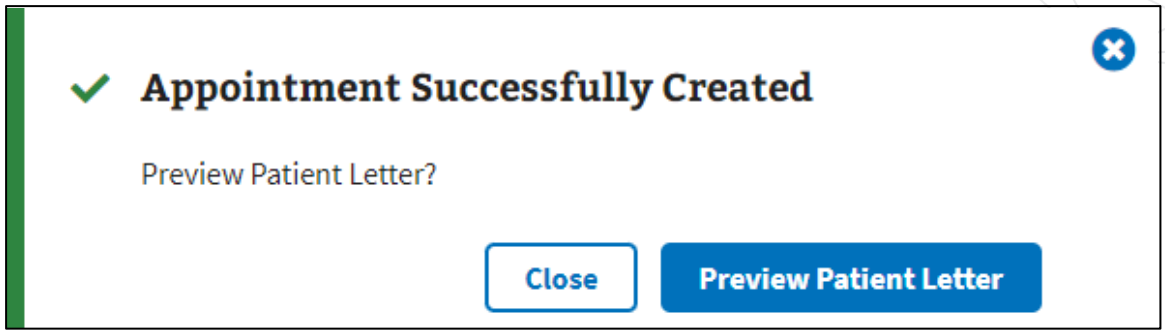


Figure 262: Preview Patient Letter Window for Walk-in Appointment

6. Reports

6.1 Query Tool

The user will need to navigate to the home screen to find the Query Tool. Please see **Figure 263** 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.

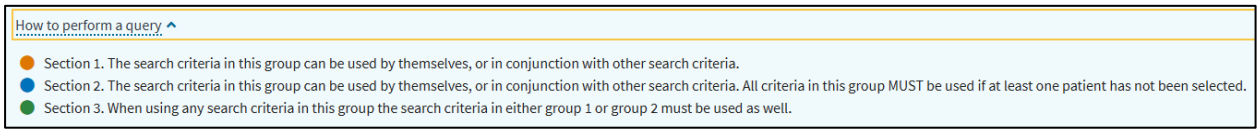


Figure 263: Overview for How to Perform a Query

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.

6.1.1 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 264**, and enter valid search criteria. A dropdown will appear with a list of patients that match the criteria given.

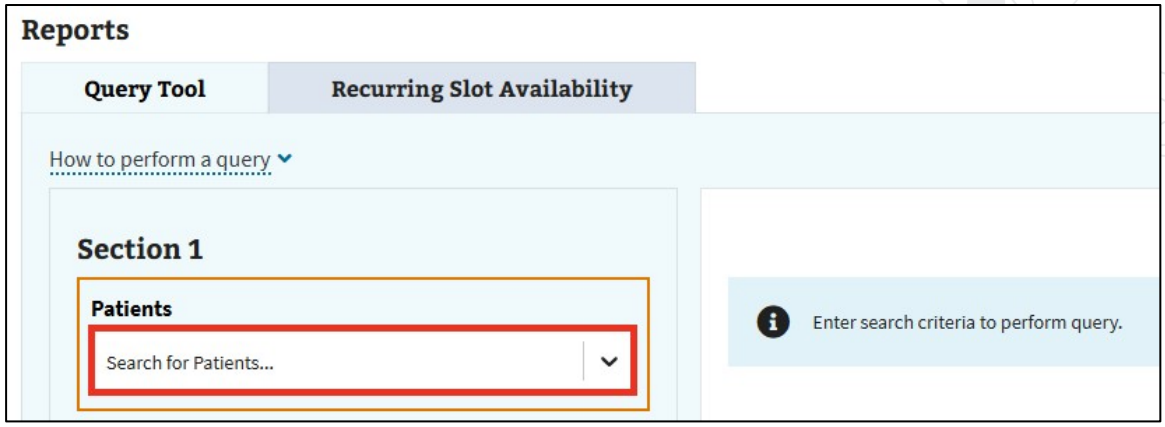


Figure 264: Dropdown to Select a Patient for Section 1 of Query Tools

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 265*** *to remove all previously selected patients.*

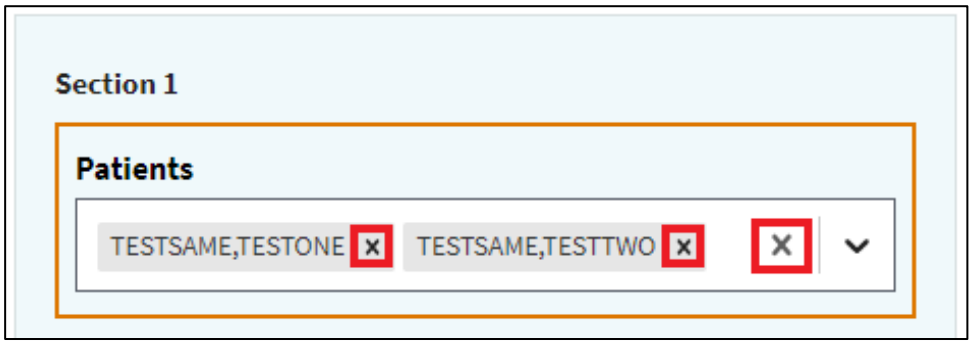


Figure 265: Remove Previously Selected Patient Icon

4. After selecting the patients needed, the user can run the query by selecting "Run Query," shown in **Figure 266**. Optionally, the user can narrow down search results by following the steps outlined in either **6.1.2 Section 2** or **6.1.3 Section 3**.

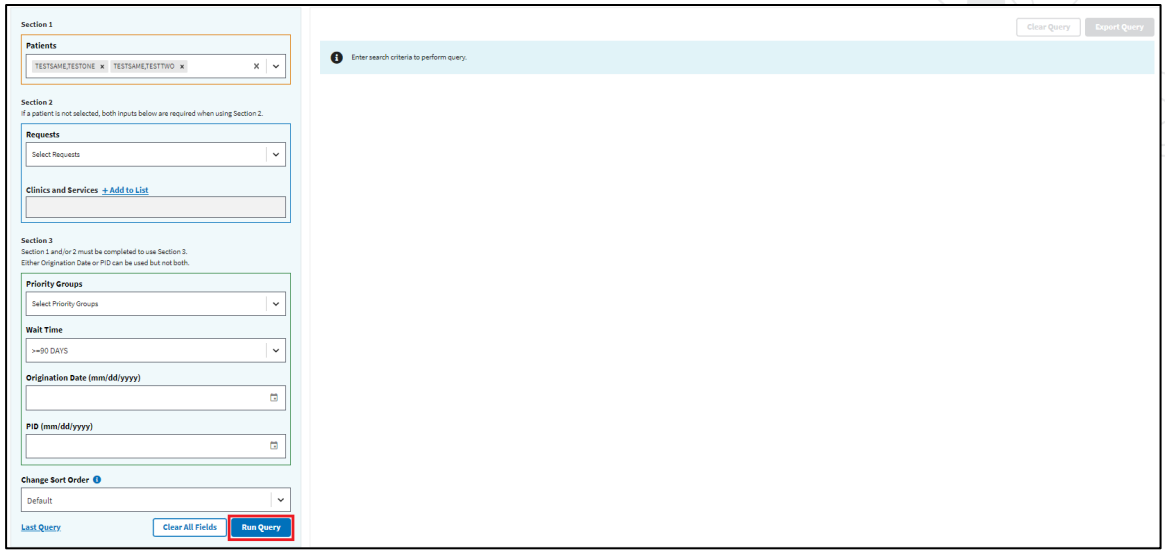


Figure 266: Run Query Button using Section 1 of Query Tools

6.1.2 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 267**, and choose a given request option. The user can individually add different requests or choose "Select All" to add all the options shown.

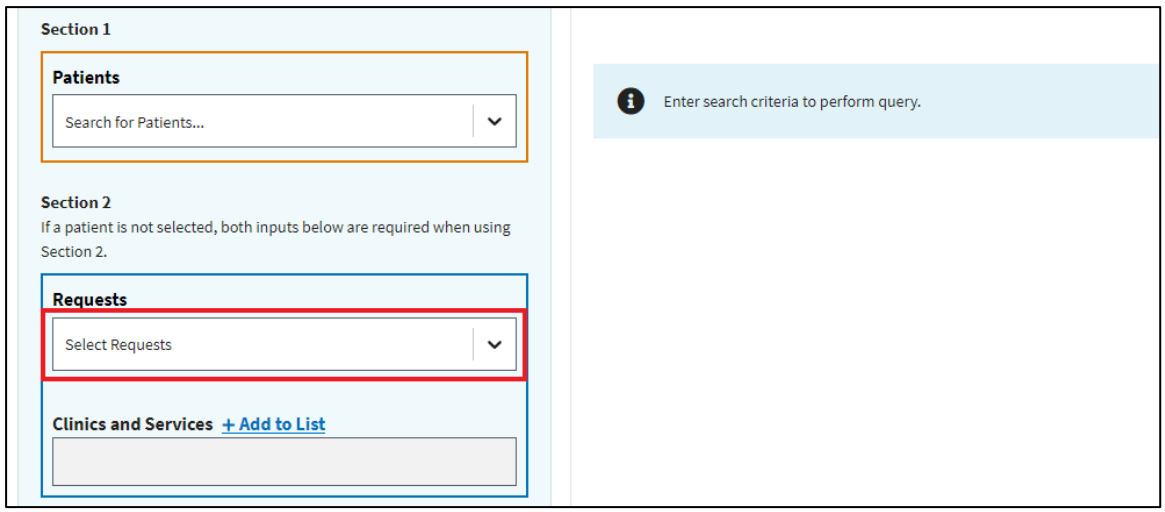


Figure 267: Dropdown to Select a Request for Section 2 of Query Tools

2. The user must then select "+ Add to List," seen in **Figure 268**, to open the Clinics/Services window.

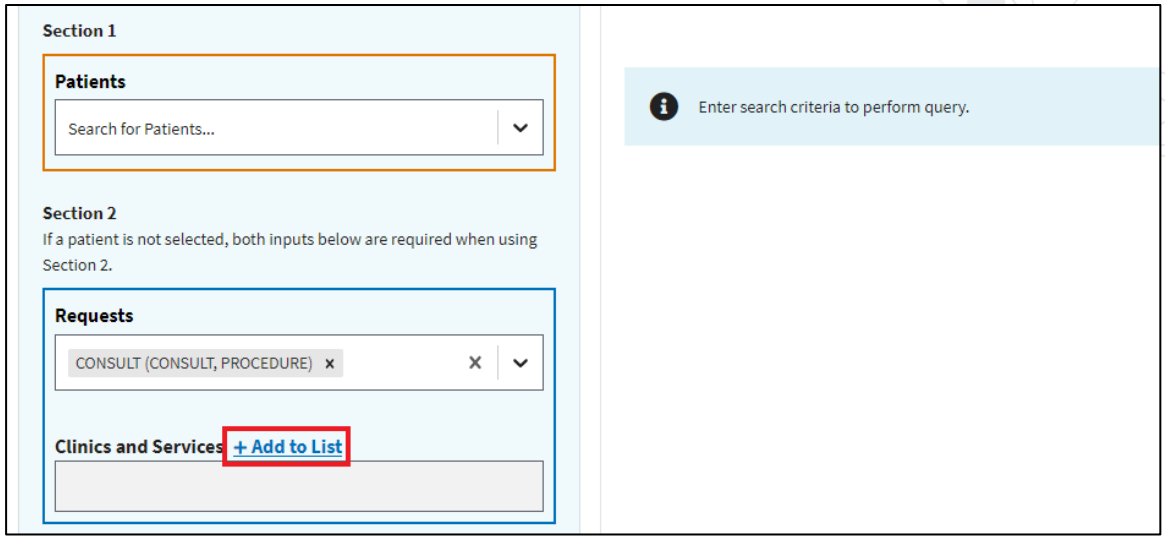


Figure 268: Button to Add Clinics and Services in Section 2 of Query Tools

3. After selecting the search bar shown in **Figure 269** below, the user will need to enter valid search criteria. This will cause any applicable results to appear in the box below.

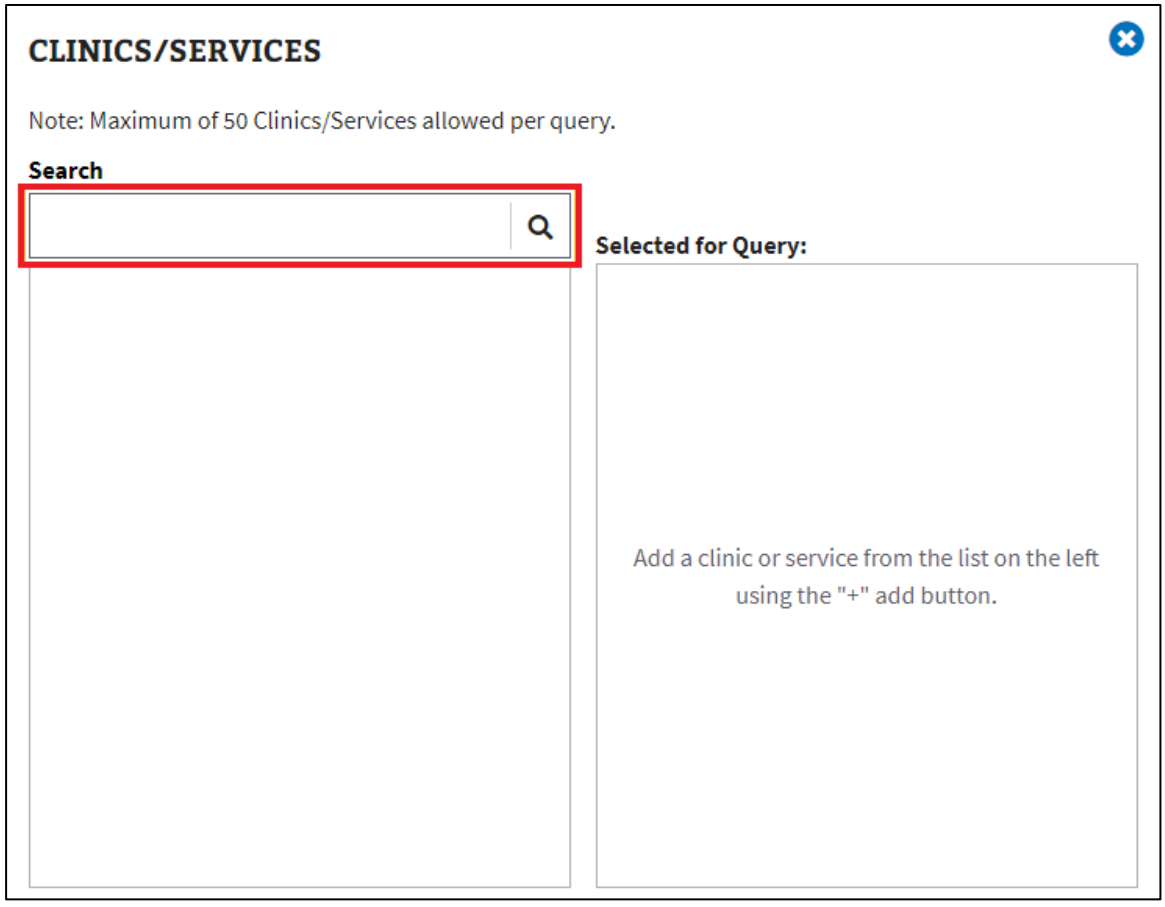


Figure 269: Search Bar for Clinics/Services for Section 2 of Query Tools

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 270** to add all the options listed.

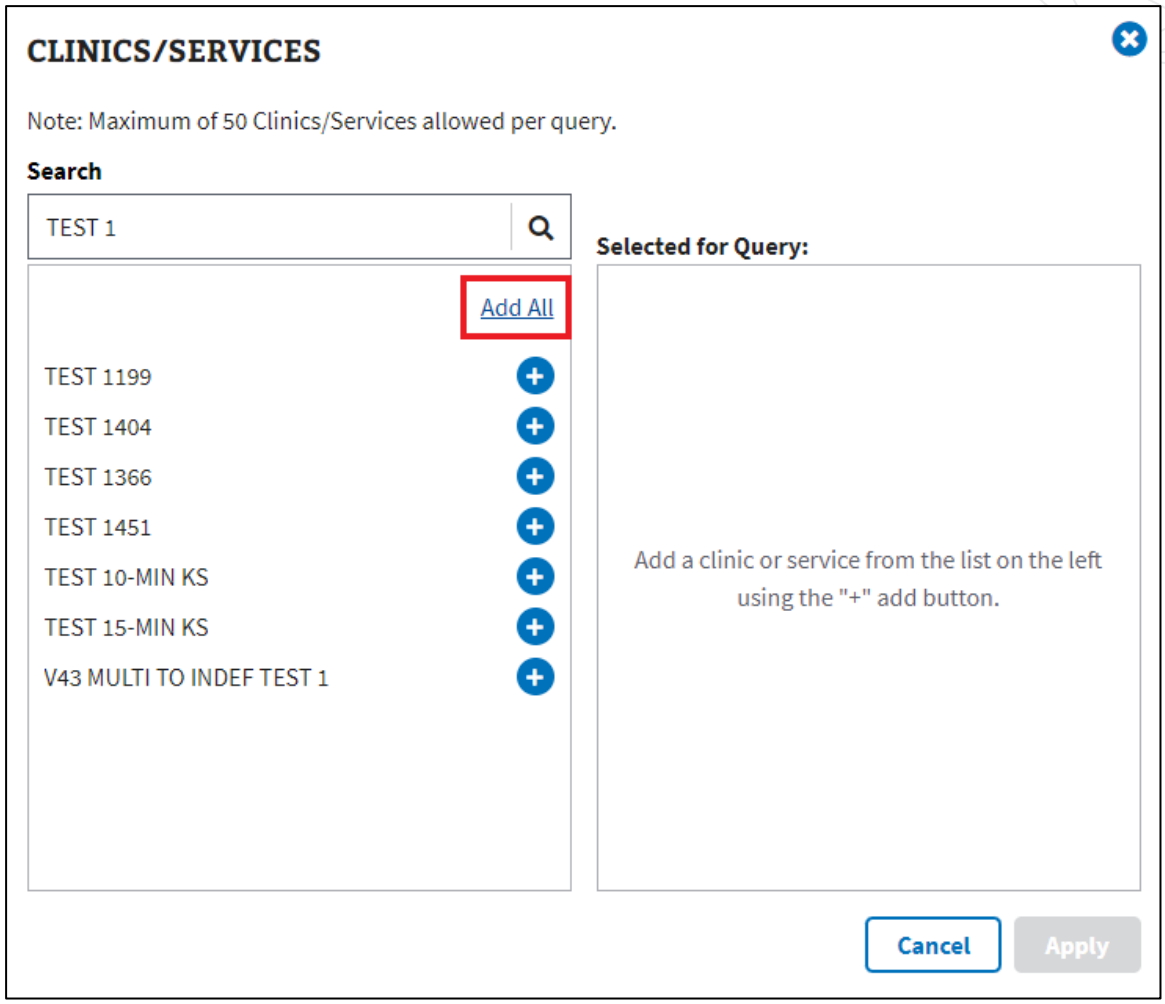


Figure 270: Button to Add All Clinics/Services

- *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 271** to remove all the options listed.*

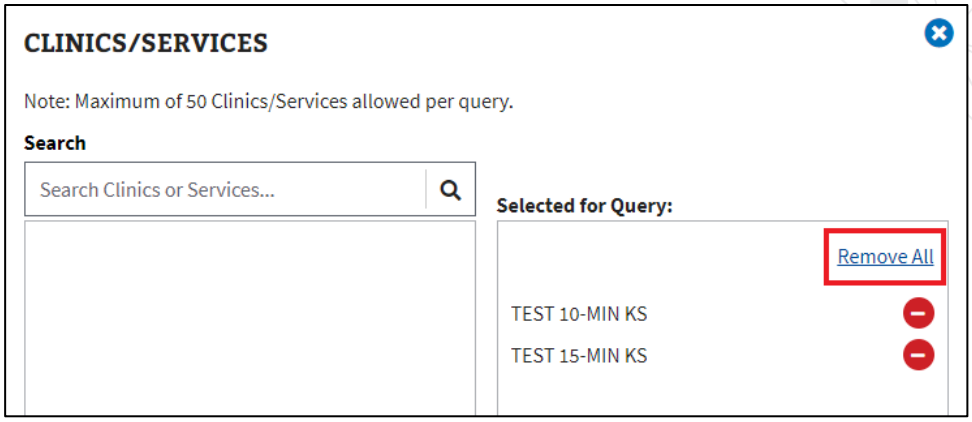


Figure 271: Button to Remove All Clinics/Services

5. The user will then select the "Apply" button, as seen in **Figure 272**, to be brought back to the query tool with any selected results applied.

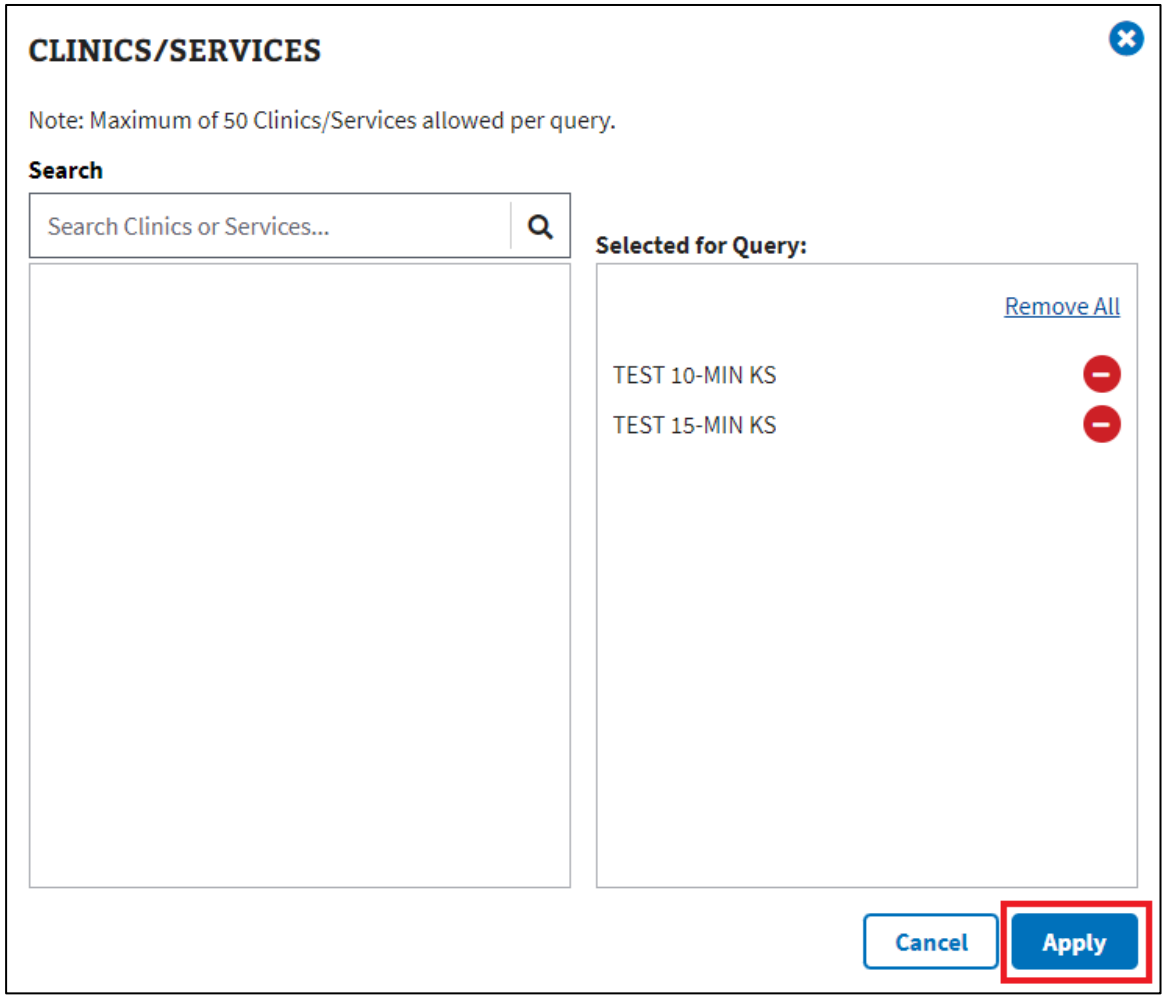


Figure 272: Apply Button for Clinics/Services for Section 2 of Query Tools

6. After filling the required fields, the user can run the query by selecting “Run Query,” shown in **Figure 273**. Optionally, the user can narrow down search results by following the steps outlined in either **6.1.1 Section 1** or **6.1.3 Section 3**.

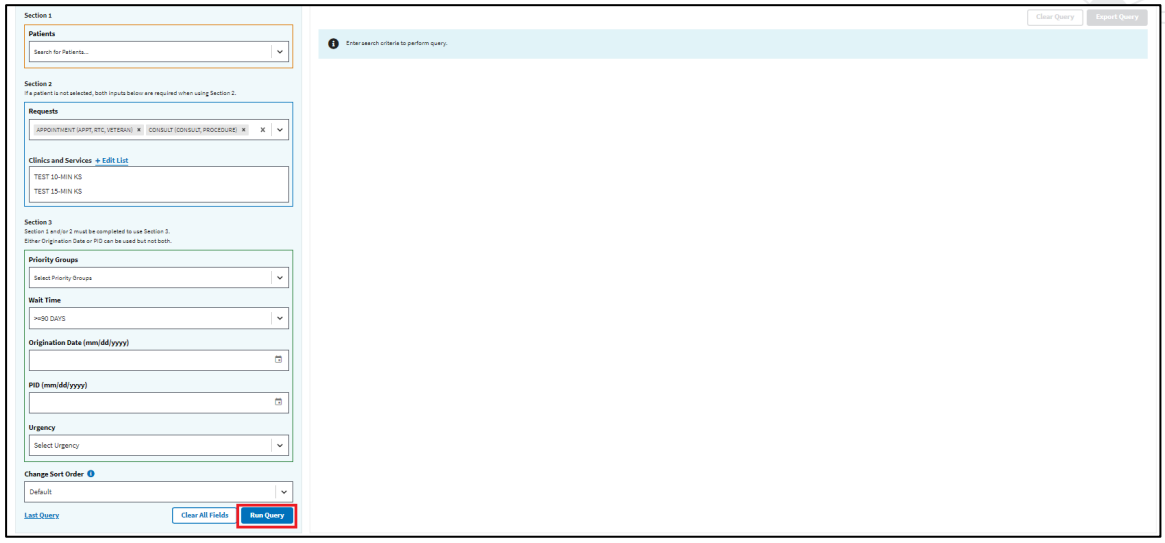


Figure 273: Run Query Button using Section 2 of Query Tools

6.1.3 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 274**, 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.

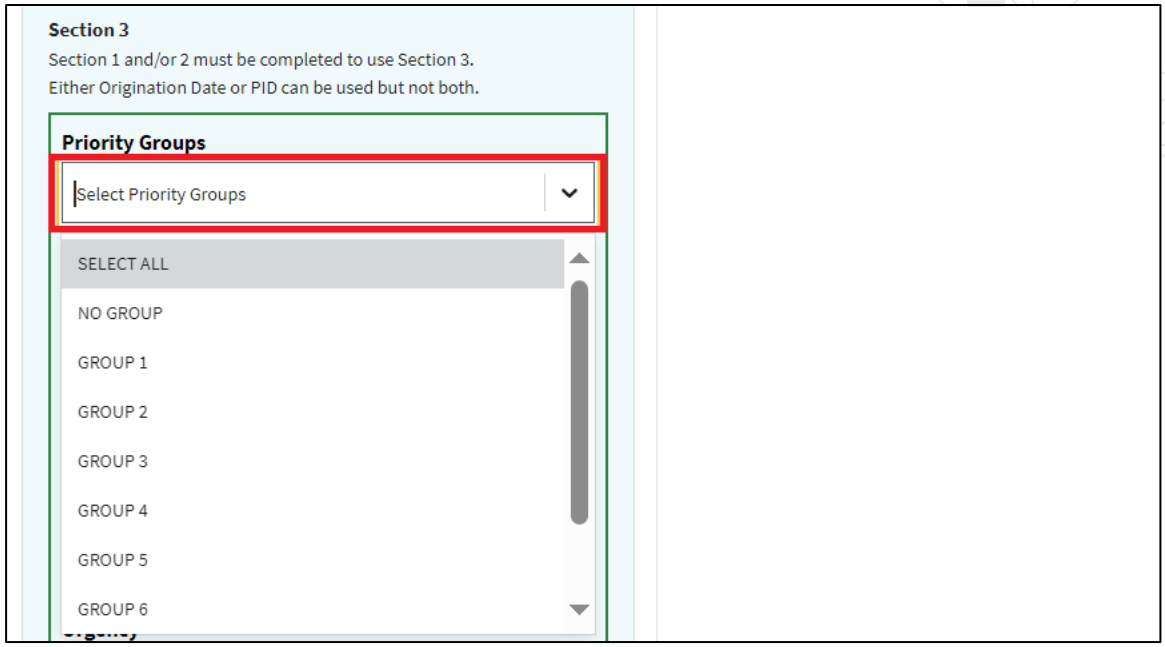


Figure 274: Dropdown to Select a Priority Group for Section 3 of Query Tools

2. The user can select the dropdown under Wait Time, seen in **Figure 275**, and choose the preferred wait time length. The user can choose "All Days" to view all wait times options.

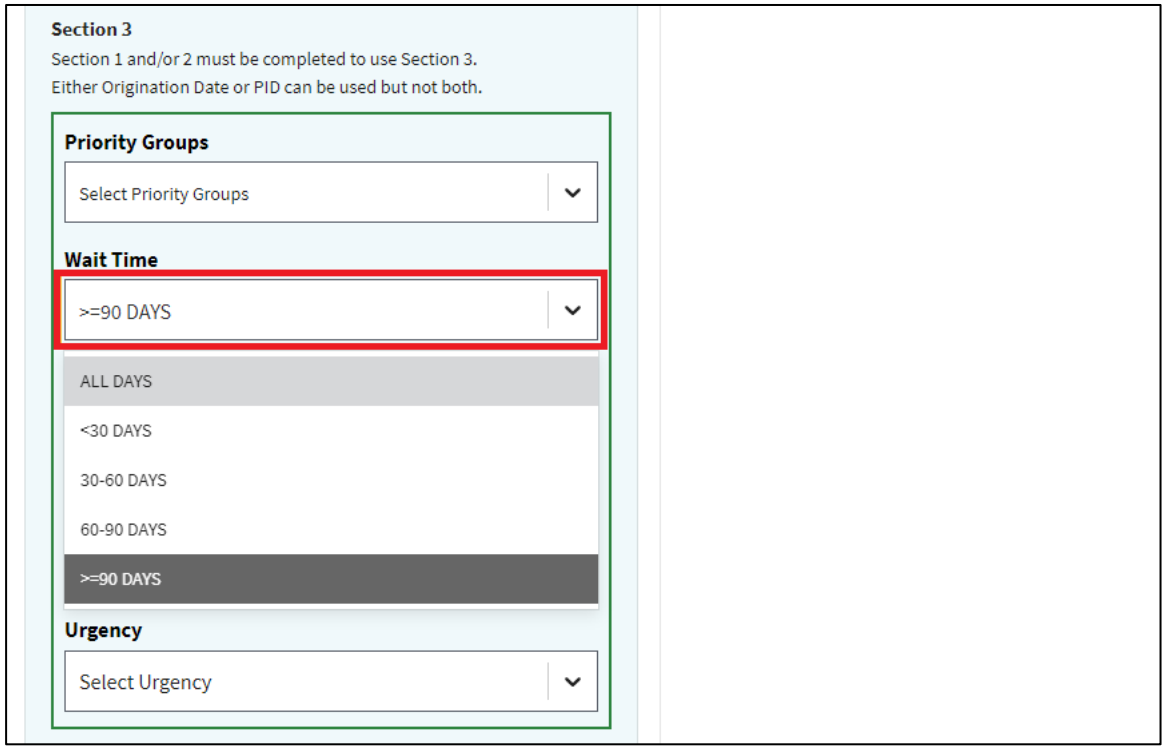


Figure 275: Dropdown to Select a Wait Time for Section 3 of Query Tools

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 276**.

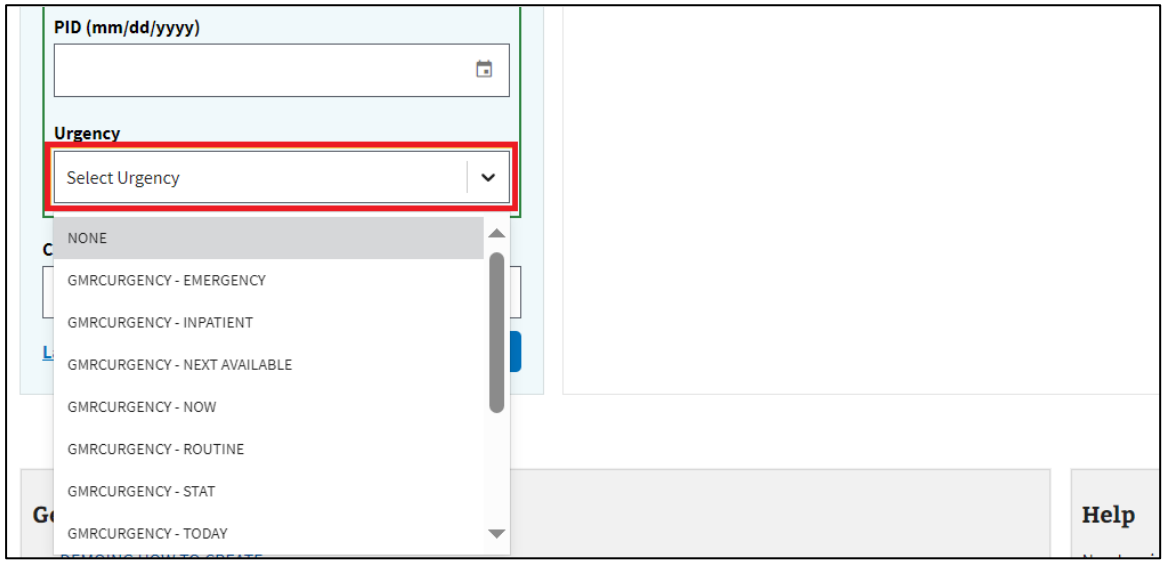


Figure 276: Dropdown to Select an Urgency Status for Section 3 of Query Tools

6.2 Recurring Slot Availability

1. To begin, the user will need to navigate to the Recurring Slot Availability tab on the homepage shown in **Figure 277**.

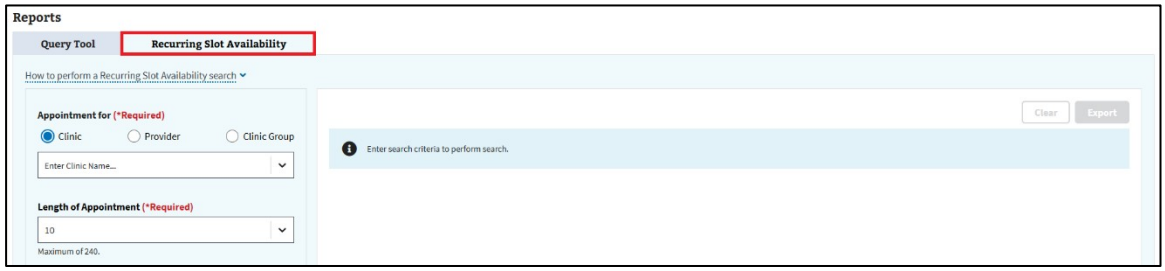


Figure 277: Recurring Slot Availability Tab

2. Under the “Appointment For” field, the Clinic radio button will be auto-populated. The user can either continue on and enter a clinic name or select either the “Provider” or “Clinic Group” radio button and enter the appropriate search criteria (see **Figure 278** for example).

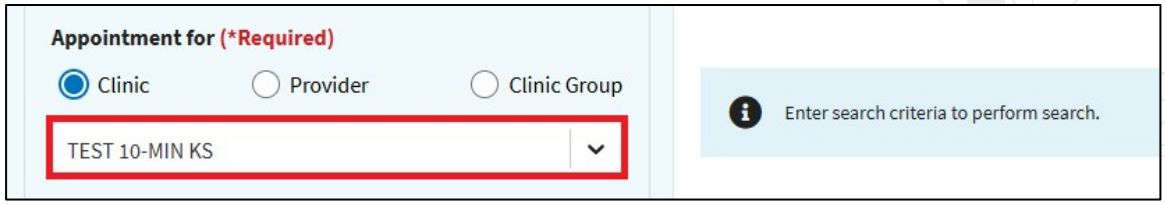


Figure 278: Appointment For Search Bar

3. The user will then need to fill out the remaining required and optional fields, as seen below in **Figure 279**.

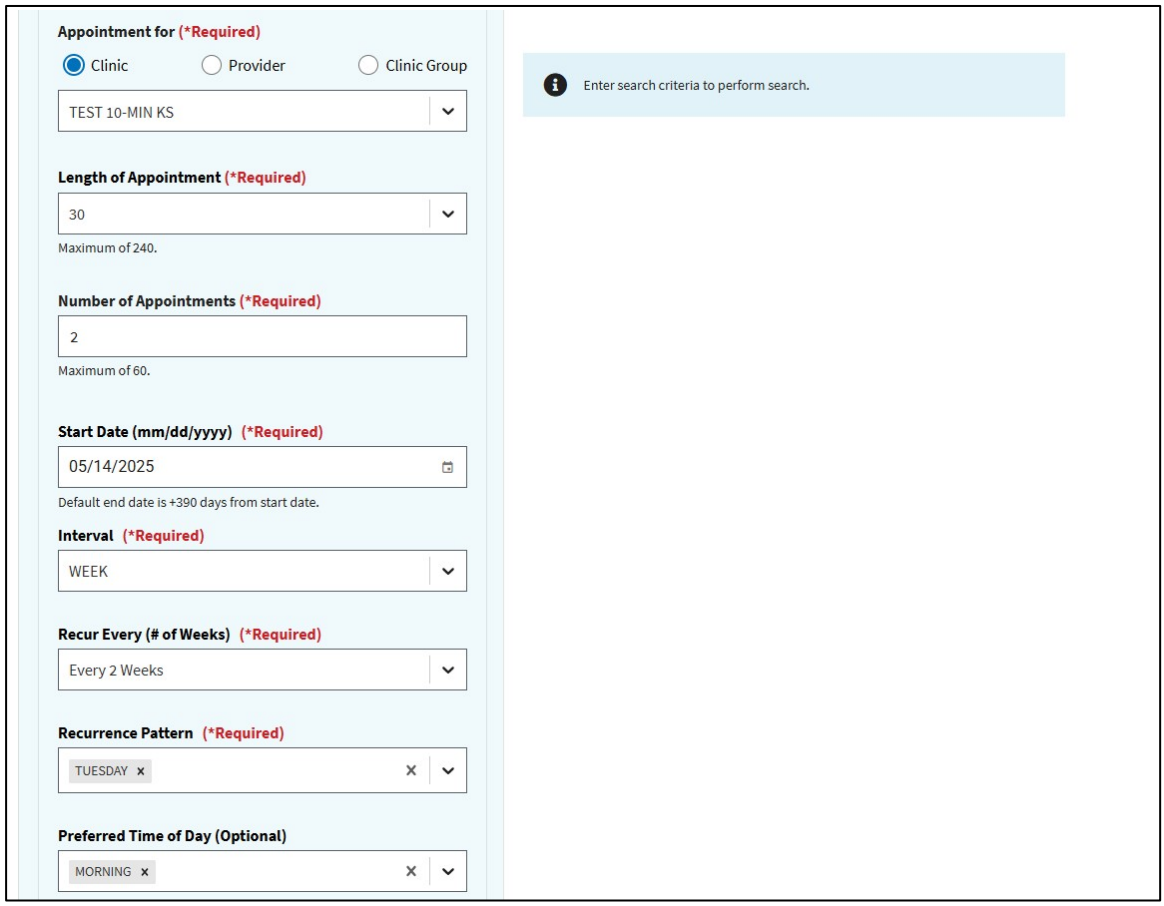


Figure 279: Recurring Slot Availability Fields

4. Once all required fields have been populated, the user can select the “Search” button shown below in **Figure 280**.

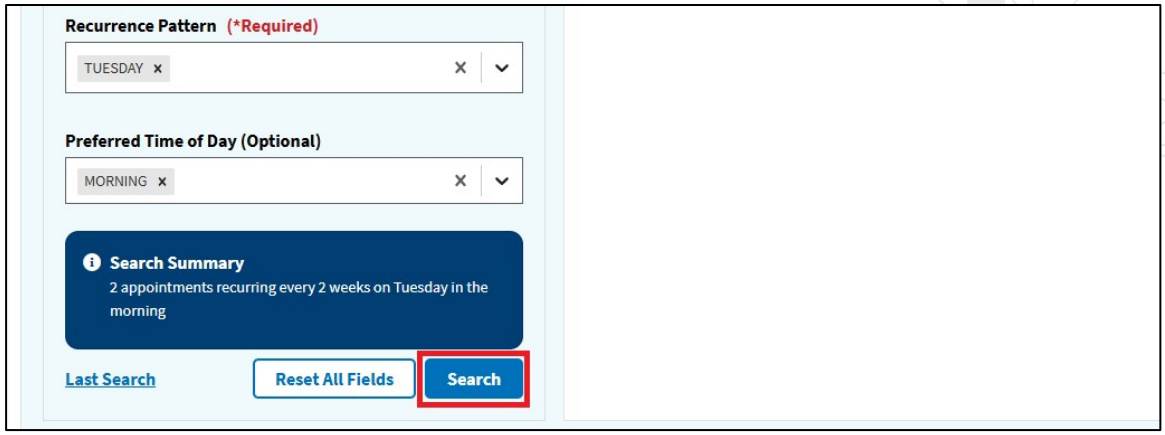


Figure 280: Search Button for Recurring Slot Availability

- *Note: After populating all required fields, the user will see a Search Summary of their choices (see **Figure 280** for example).*

5. Results from the search will populate on the right-hand side of the page, as seen in **Figure 281**. For more information on how to navigate these results, see section **2.3 Filters**.

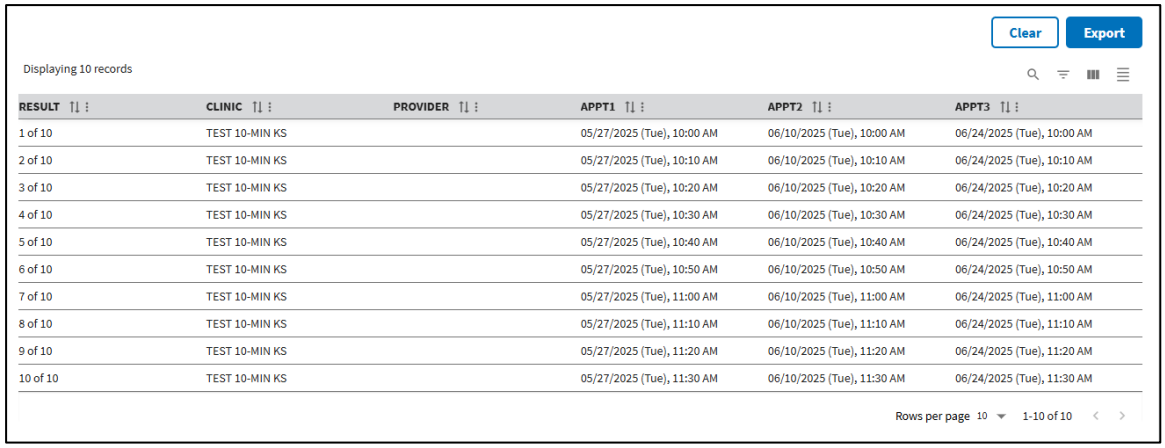


Figure 281: Example of Recurring Slot Availability Search Results

6. To clear results, the user can select either the “Clear” button in **Figure 281**, or the “Reset All Fields” button seen in **Figure 282**.

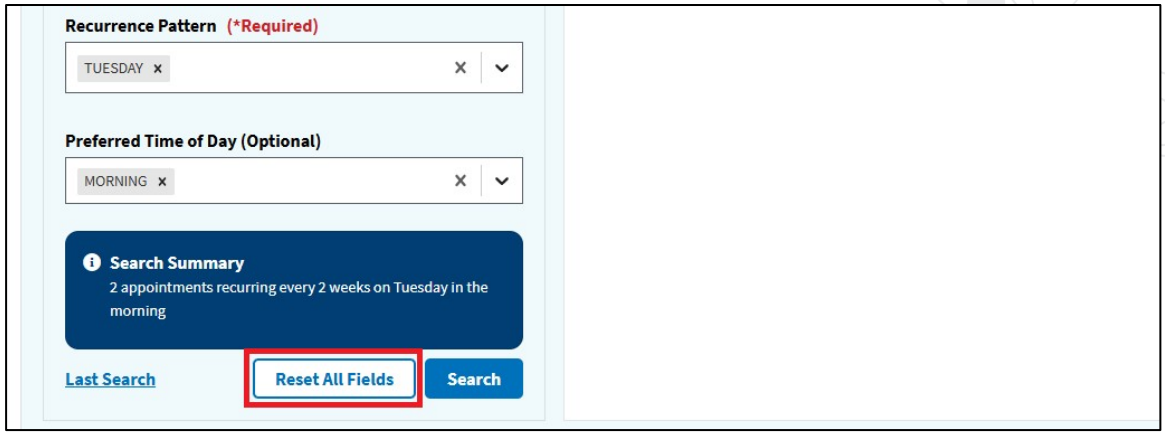


Figure 282: Reset All Fields Button for Recurring Slot Availability

- ❖ *Note: The user can also choose to go back to their previously completed search by selecting the "Last Search" button seen in **Figure 283.***



Figure 283: Last Search Button for Recurring Slot Availability

7. To export search results, select the "Export" button seen in **Figure 284**. This will allow the user to download the report into an Excel document.

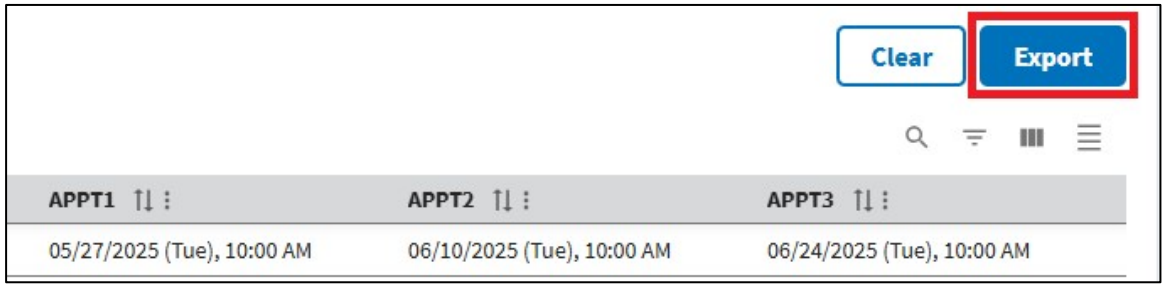


Figure 284: Export Button for Recurring Slot Availability

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 285**, at the top of the webpage.

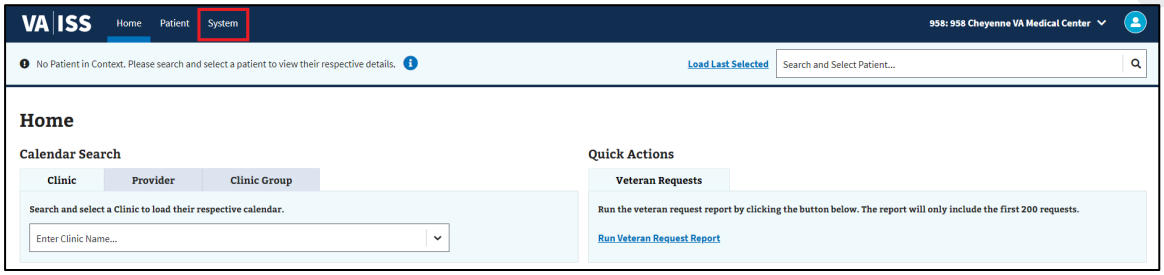


Figure 285: Systems Tab on the Homepage

7.1 Privileged Users

1. To add or remove Privileged Users, the user will need to select the "Privileged Users" tab shown in **Figure 286**.

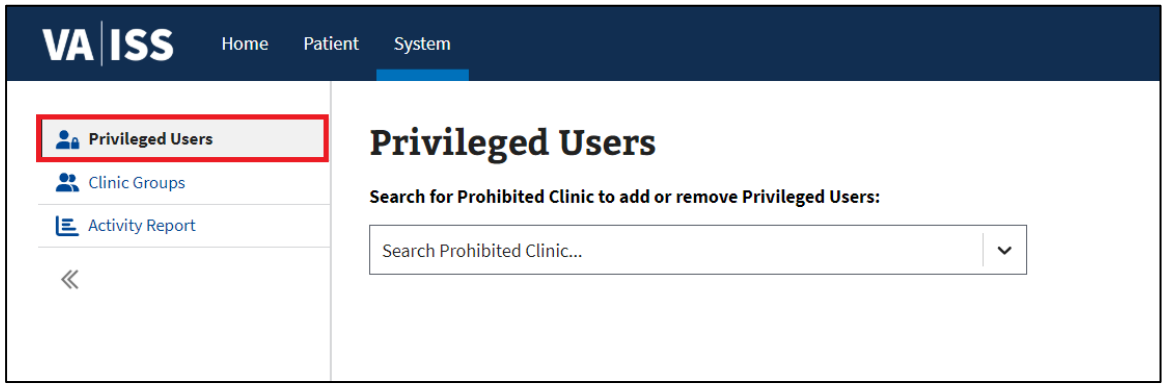


Figure 286: Privileged Users Tab

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 287** below, where the user can select the intended clinic.

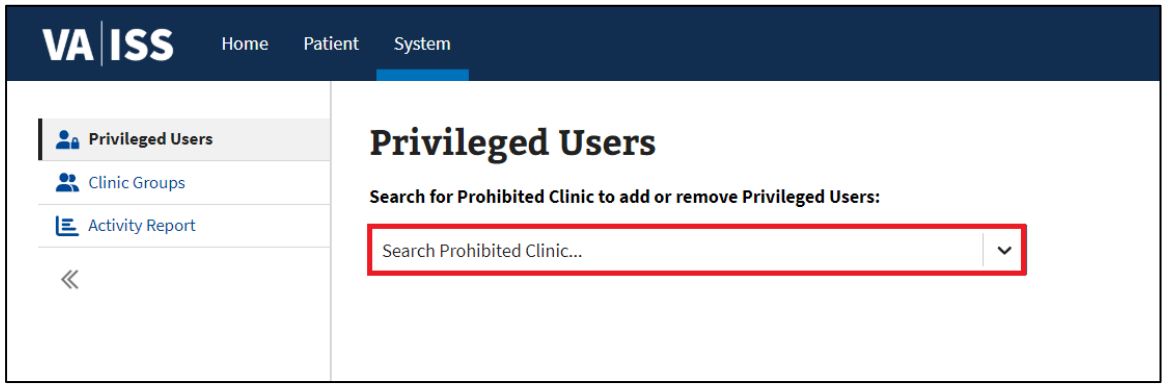


Figure 287: Search Bar for Privileged Users

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 288**. 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 288: 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 289** to remove all of the users listed.*

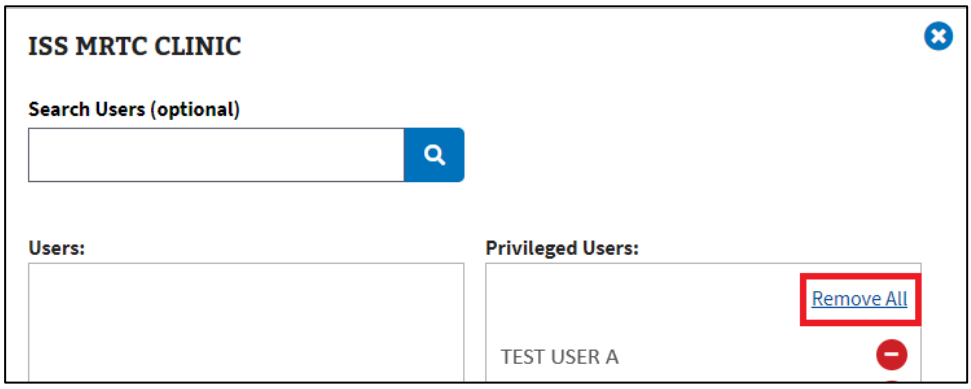


Figure 289: Button to Remove All Users from a Clinic

4. Once all Privileged users have been added, select the "Save Changes" button, seen in **Figure 290**, to save all changes.

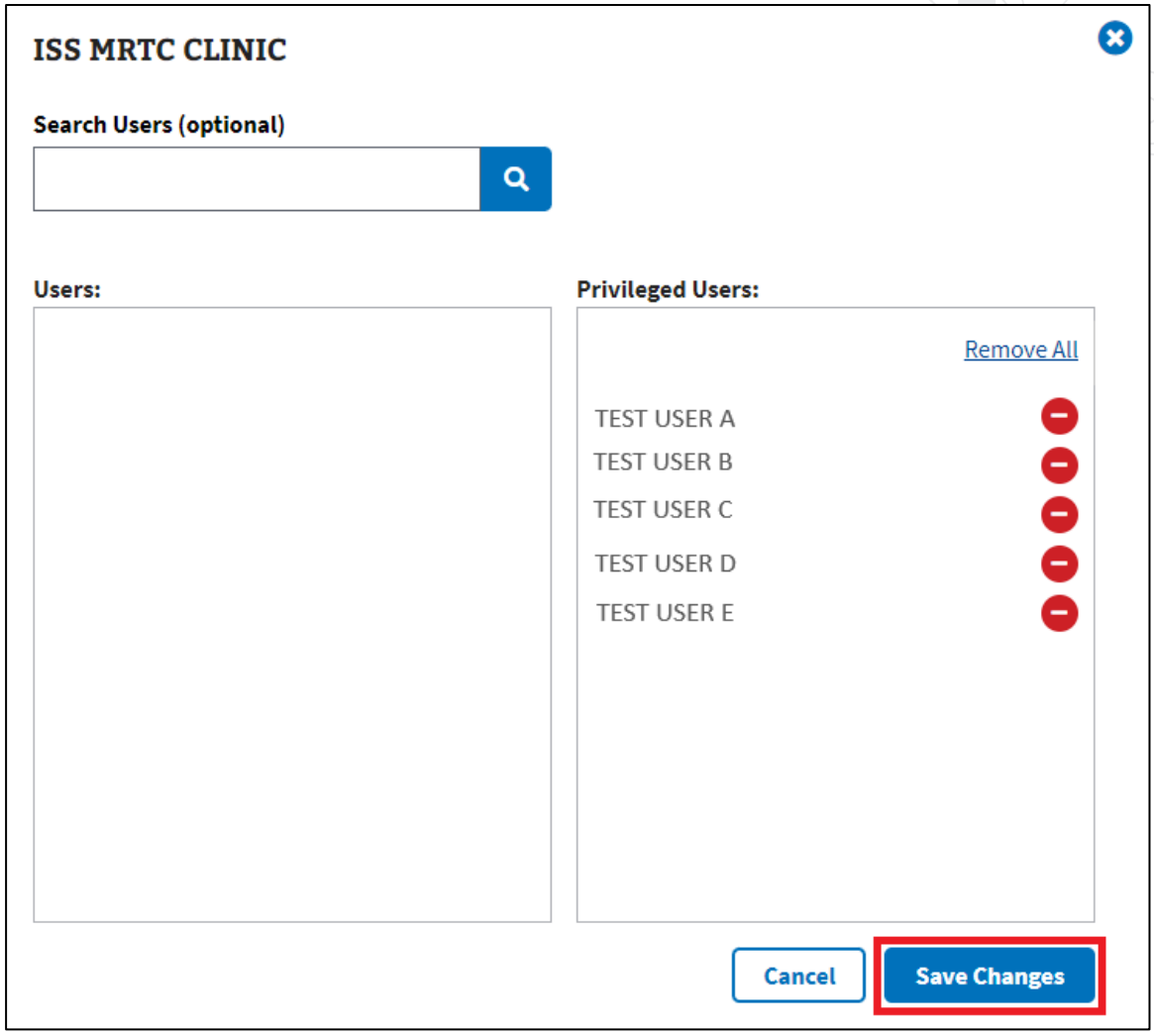


Figure 290: Save Changes Button for Privileged Users

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 291**.

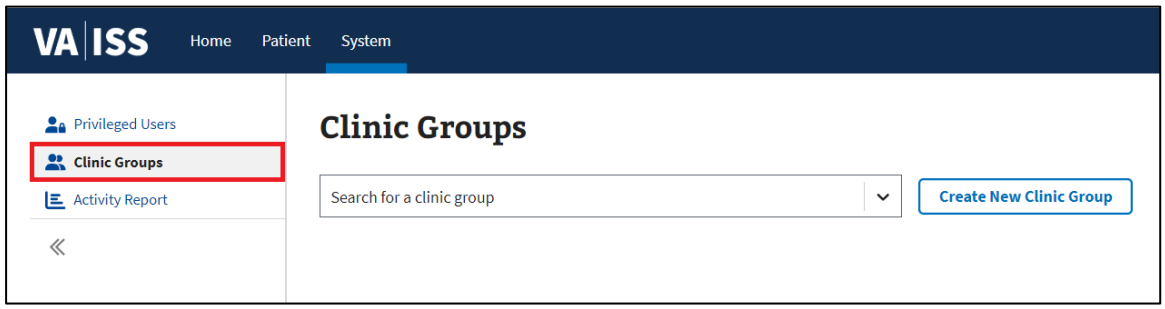


Figure 291: Selecting Clinic Groups Tab for Editing

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 292** below, where the user can select the intended clinic group.

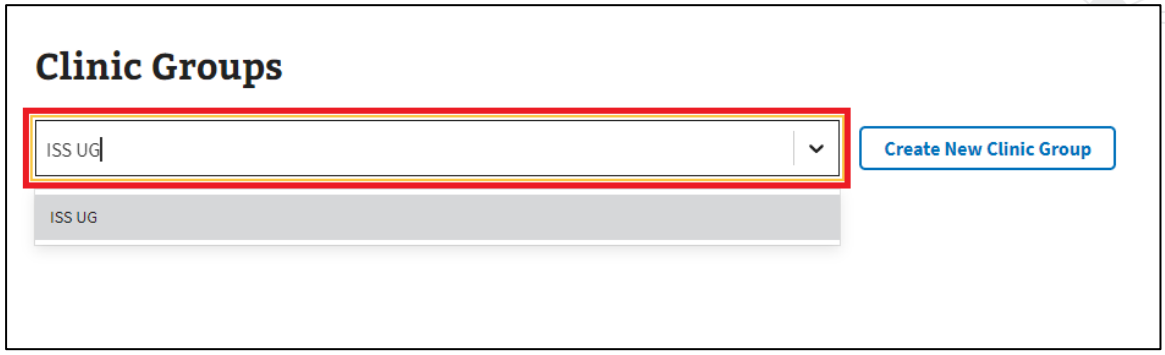


Figure 292: Search Bar for Finding a Clinic Group to Edit

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 293**, to open the Edit Clinic Group window.

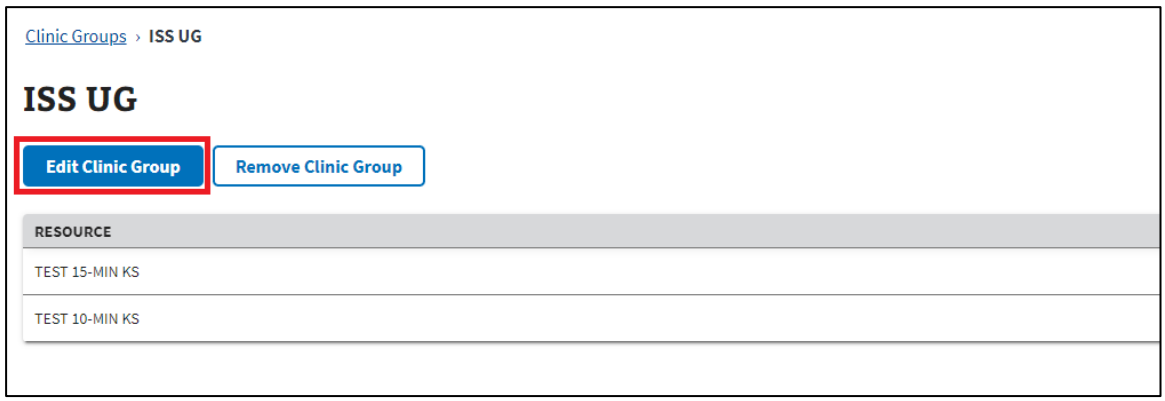


Figure 293: Edit Clinic Group Button

4. To change the clinic group name, select the field shown in **Figure 294** and make the necessary changes.

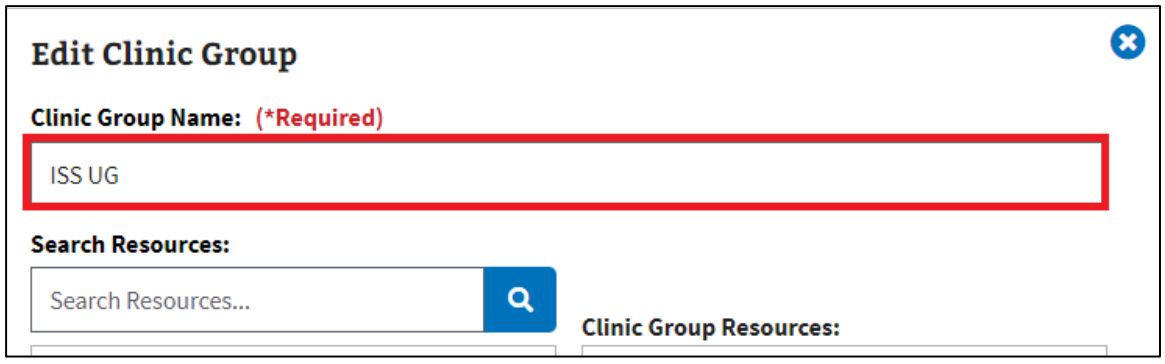


Figure 294: Field for Clinic Group Name when Editing a Clinic Group

5. To add resources, the user will need to enter valid search criteria into the search bar seen in **Figure 295**. This will cause any applicable results to appear in the box below.

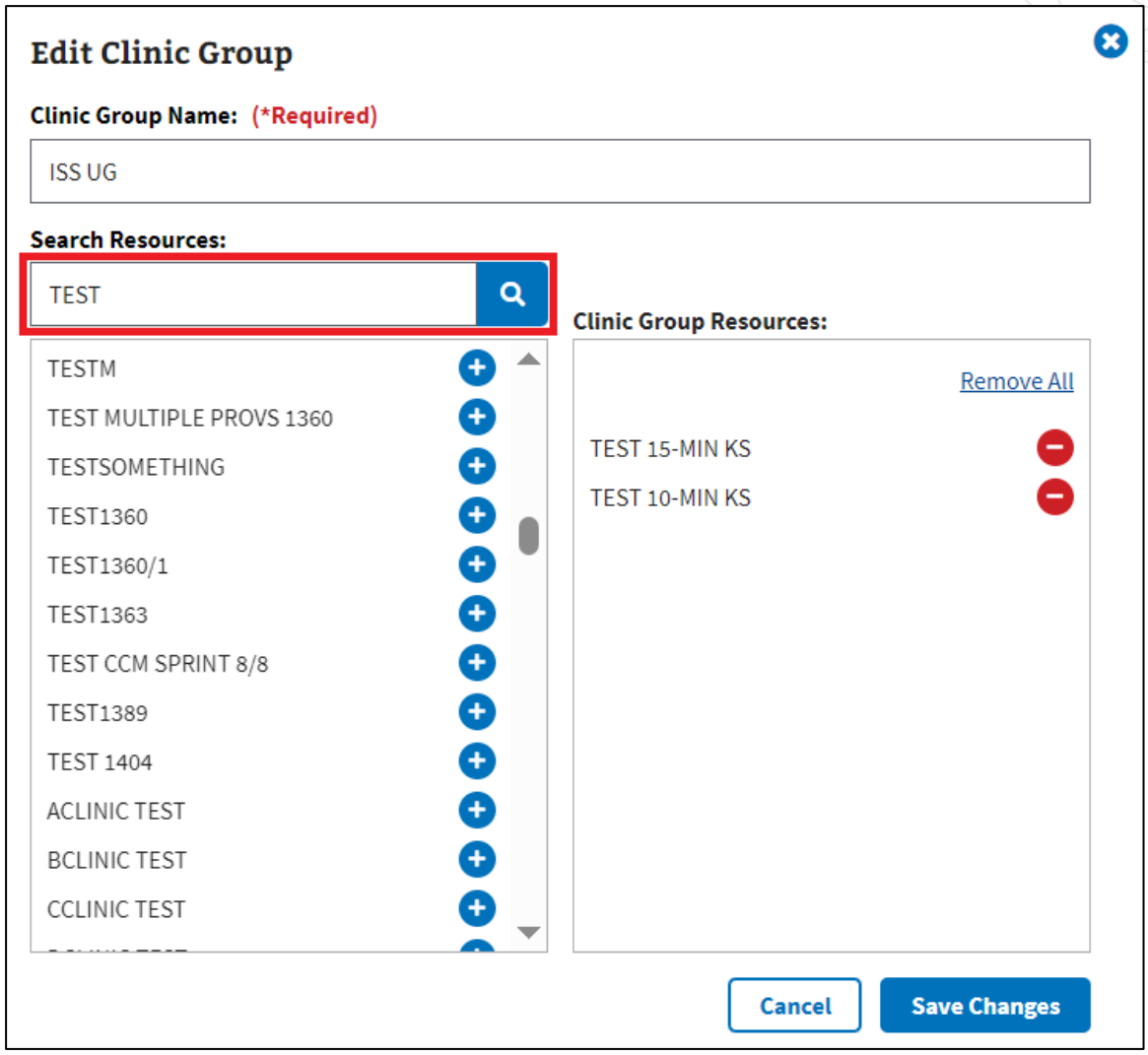


Figure 295: Search Bar to Find Resources when Editing a Clinic Group

8. 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 296** to add all the options listed.

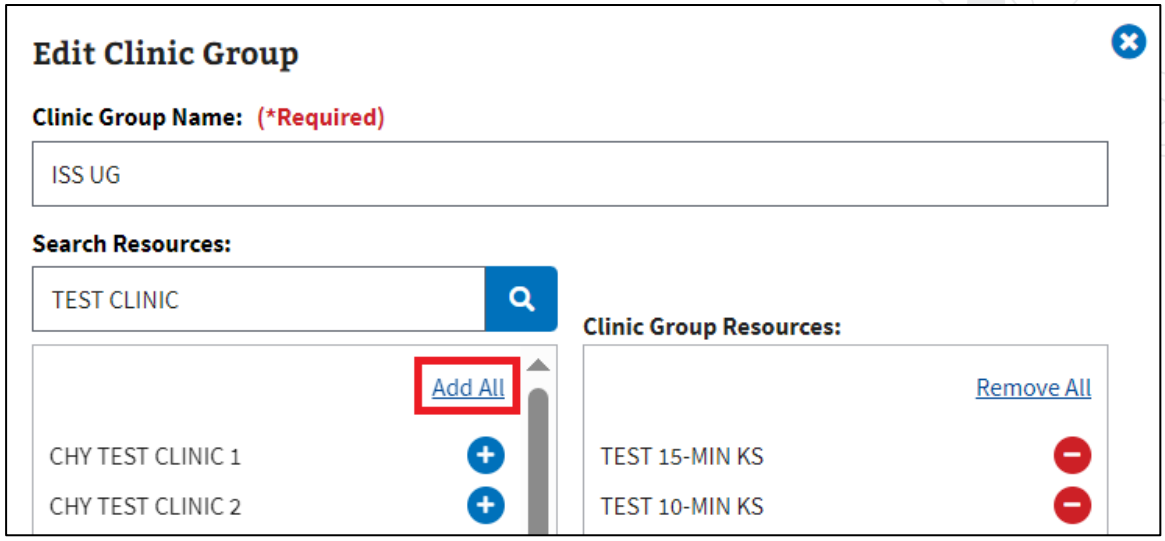


Figure 296: Button to Add All Resources when Editing a Clinic Group

- *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 297** to remove all the options listed.*

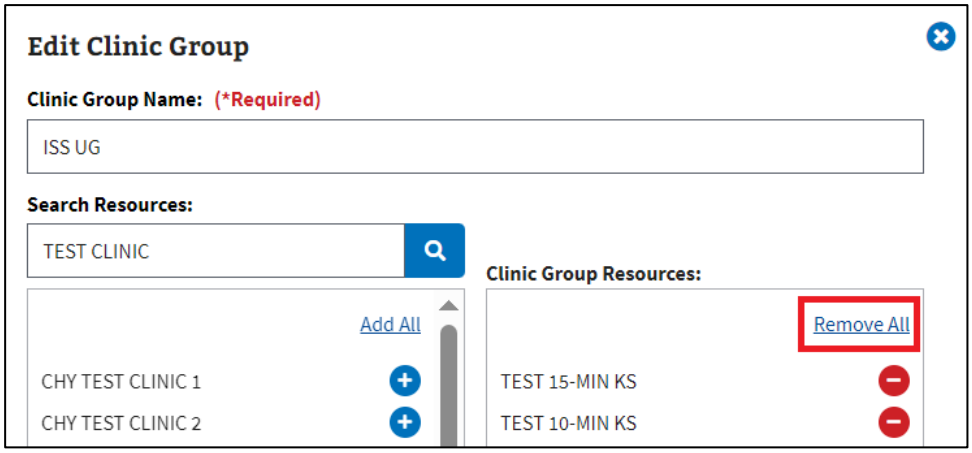


Figure 297: Button to Remove All Resources when Editing a Clinic Group

9. After making the necessary edits, the user will need to select the "Save Changes" button, seen in **Figure 298**, to save all changes.

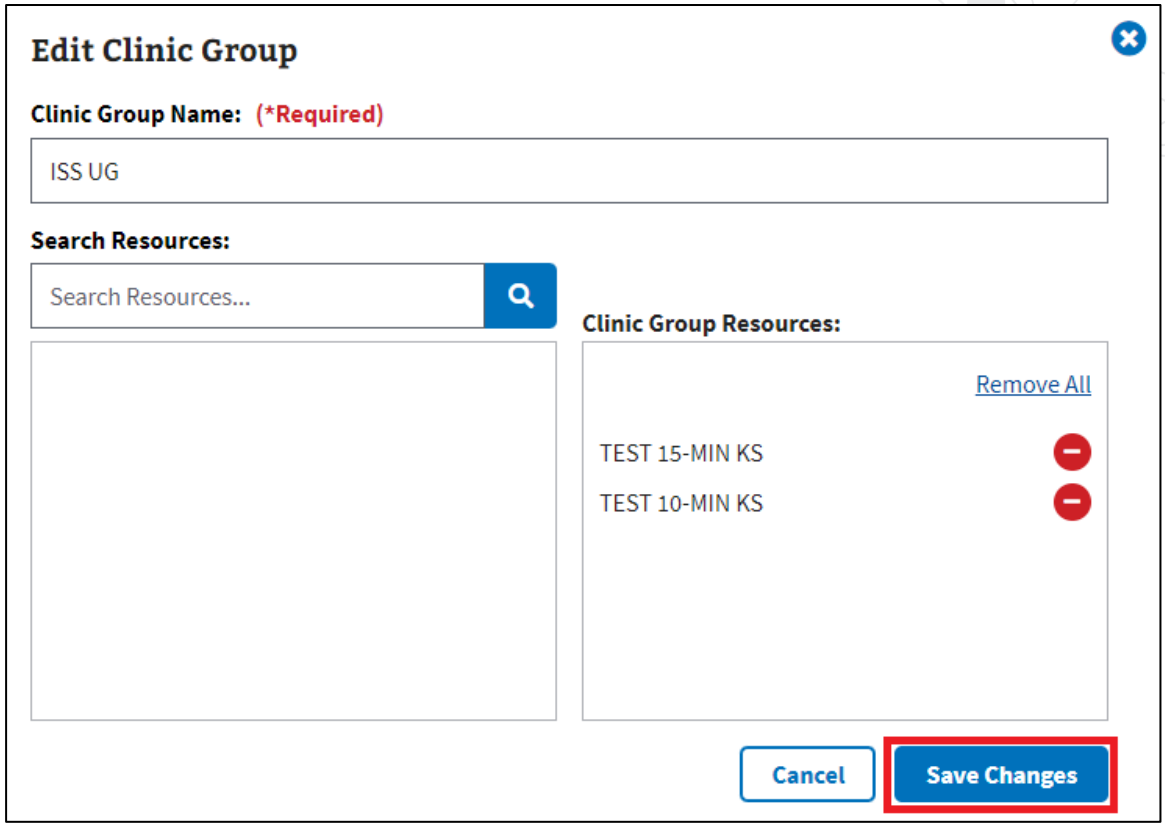


Figure 298: Save Changes Button for Editing Clinic Groups

10. The user will be brought to the Successfully Updated Clinic Group window shown in **Figure 299** below. Select close to finish.

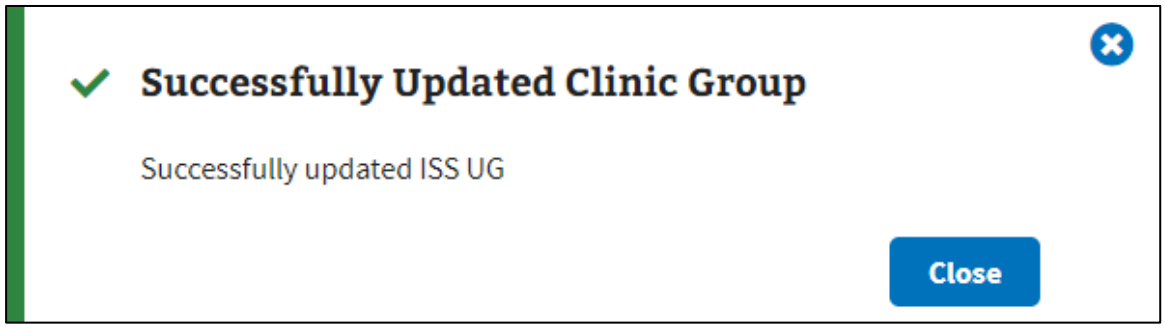


Figure 299: Successfully Updated Clinic Group Window

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 300**.

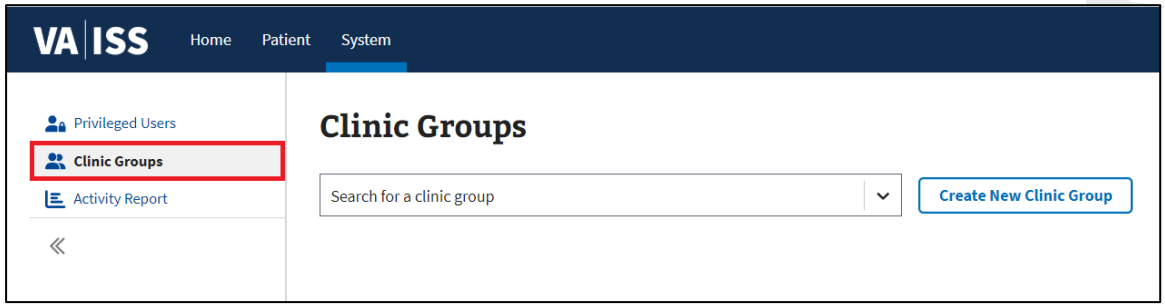


Figure 300: Selecting Clinic Groups Tab to Remove

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 301** below, where the user can select the intended clinic group.

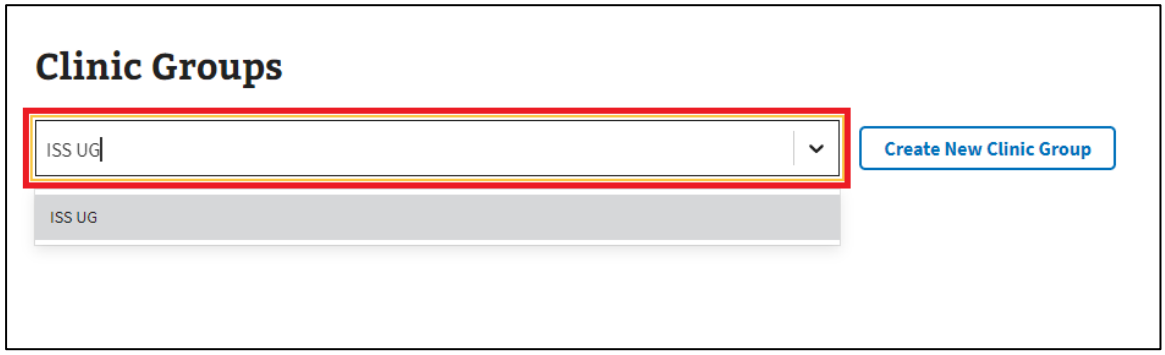


Figure 301: Search Bar for Finding a Clinic Group to Remove

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 302**. This will cause the Remove Clinic Group? notification to appear.

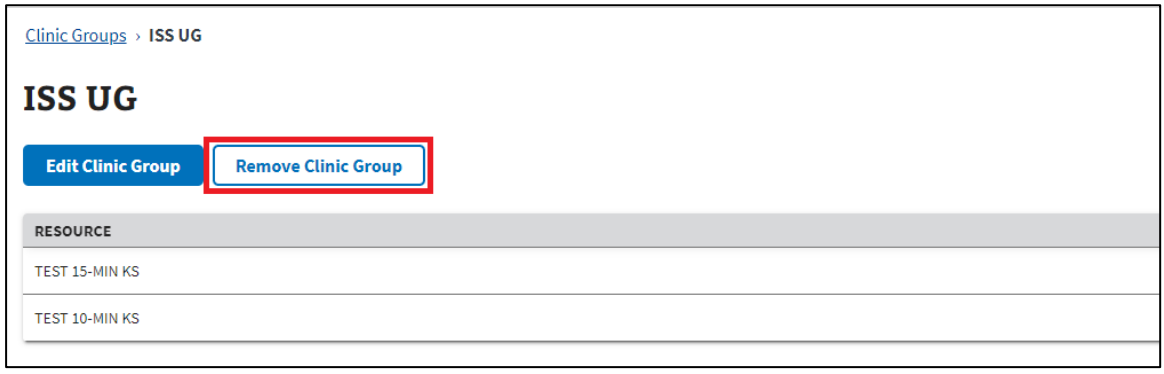


Figure 302: Remove Clinic Group Button

4. The user can select the “Remove Clinic Group” button, seen in **Figure 303**, to successfully remove the clinic group.

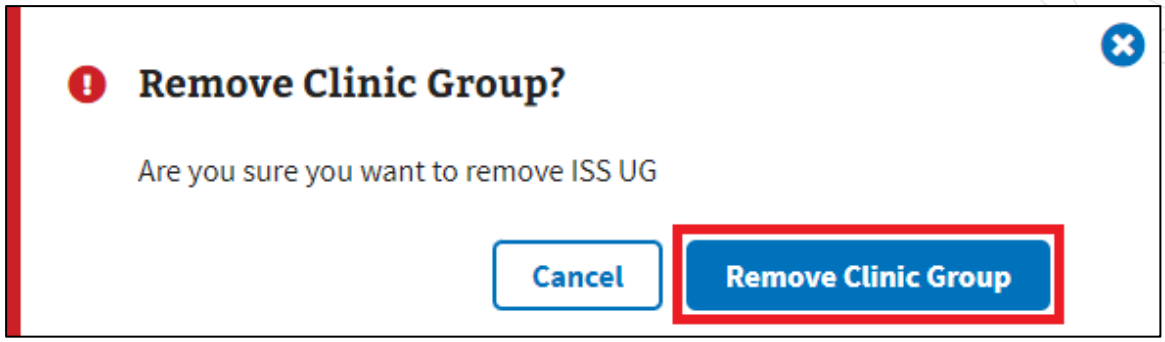


Figure 303: Remove Clinic Group Button from Confirmation Window

- ❖ *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 303** 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 304** below. Select close to finish.

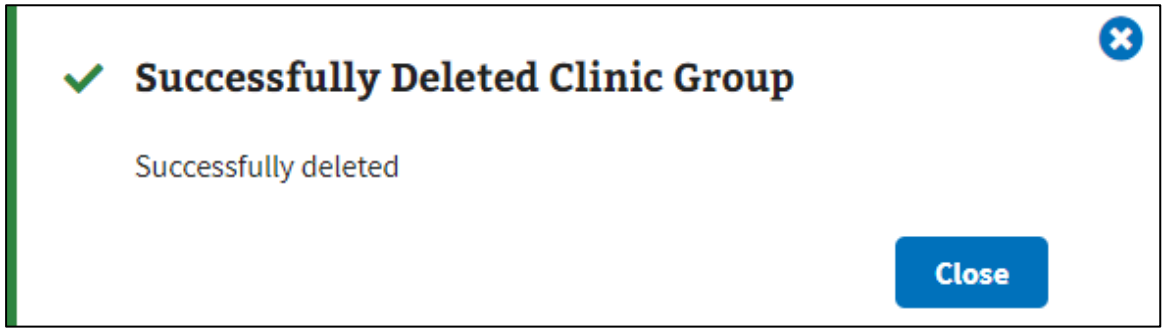


Figure 304: Successfully Deleted Clinic Group Window

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 305**.

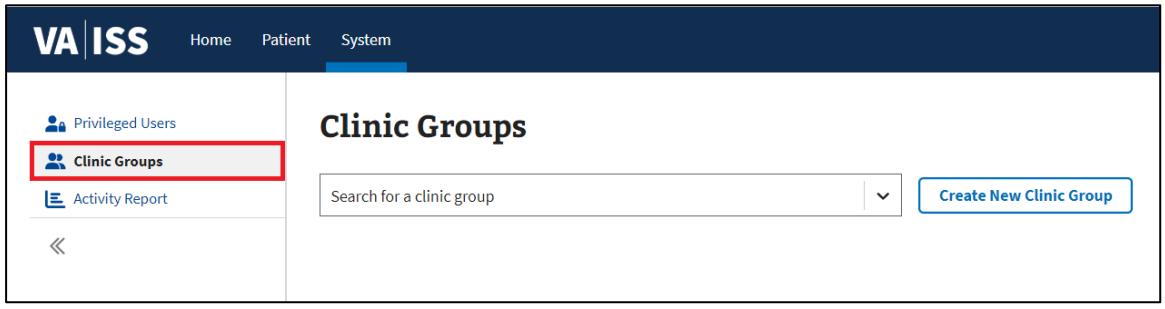


Figure 305: Selecting Clinic Groups Tab to Create New Clinic Group

2. The user can then select the “Create New Clinic Group” button shown in **Figure 306** to be brought to the Create New Clinic Group window.

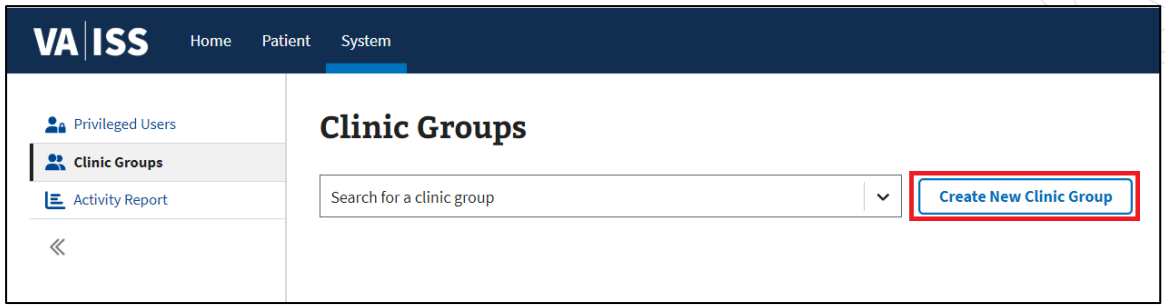


Figure 306: Create New Clinic Group Button

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 307**.

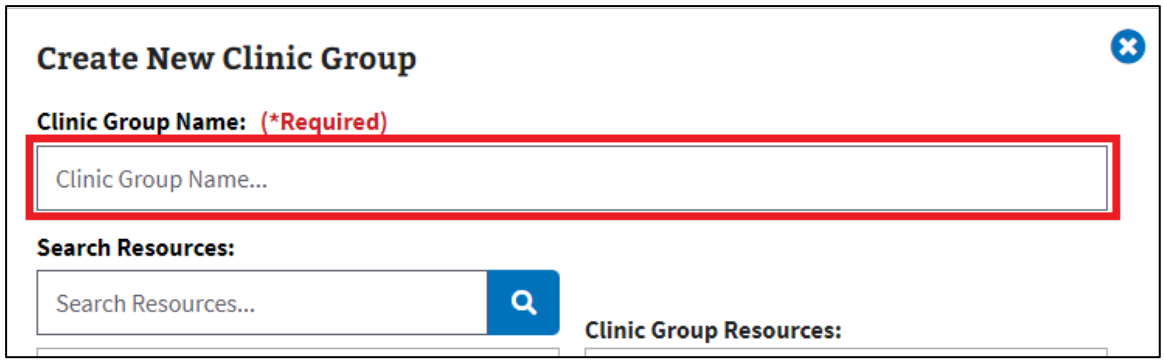


Figure 307: Field for Clinic Group Name when Creating New Clinic Group

4. To add resources to the clinic group, the user will need to enter valid search criteria into the search bar seen in **Figure 308**. This will cause any applicable results to appear in the box below.

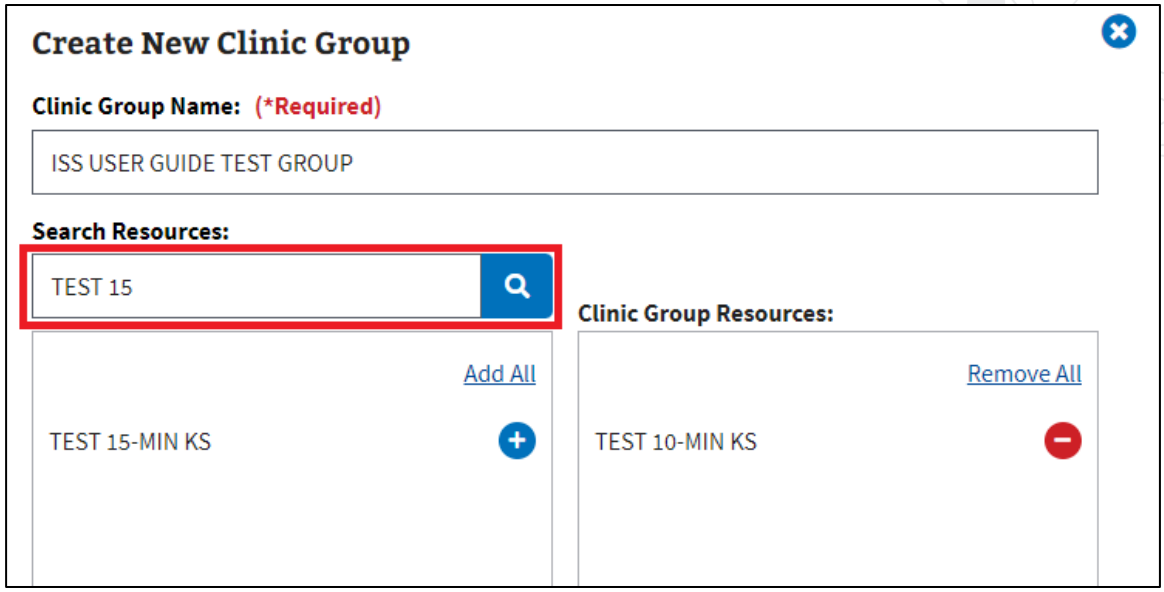


Figure 308: Search Bar to Find Resources when Creating a New Clinic Group

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 309** to add all the options listed.

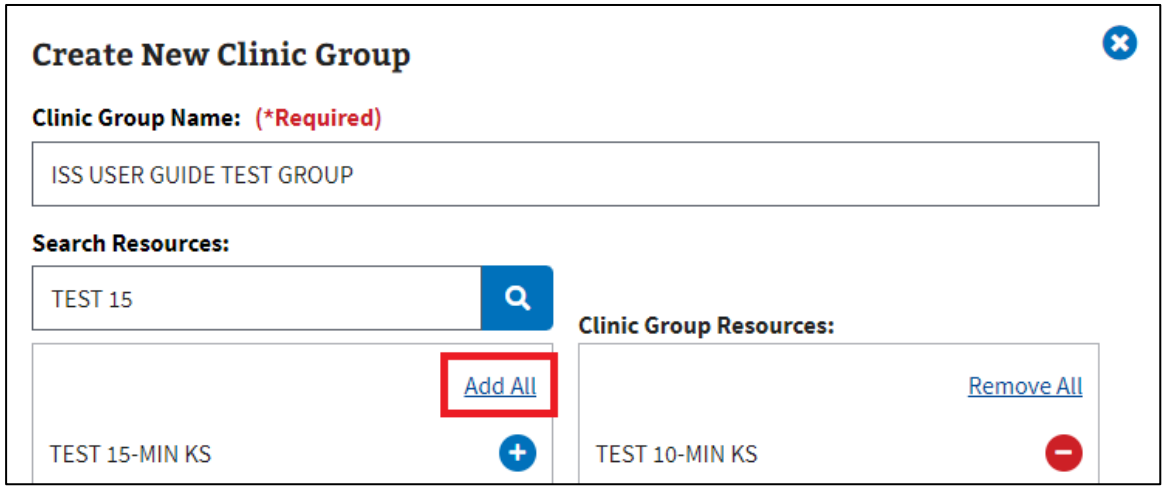


Figure 309: Button to Add All Resources when Creating a Clinic Group

- *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 310** to remove all the options listed.*

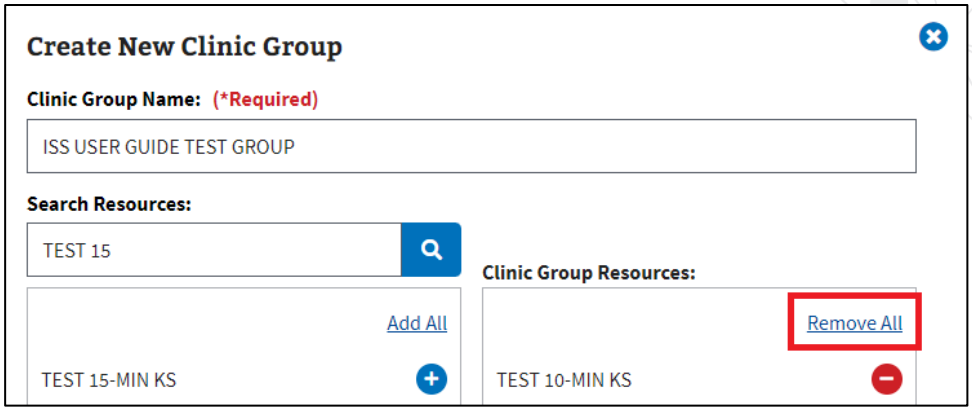


Figure 310: Button to Remove All Resources when Creating a Clinic Group

6. Once all necessary clinic group resources have been added, the user will need to select the "Create Clinic Group" button, seen in **Figure 311**, to create the new clinic group.

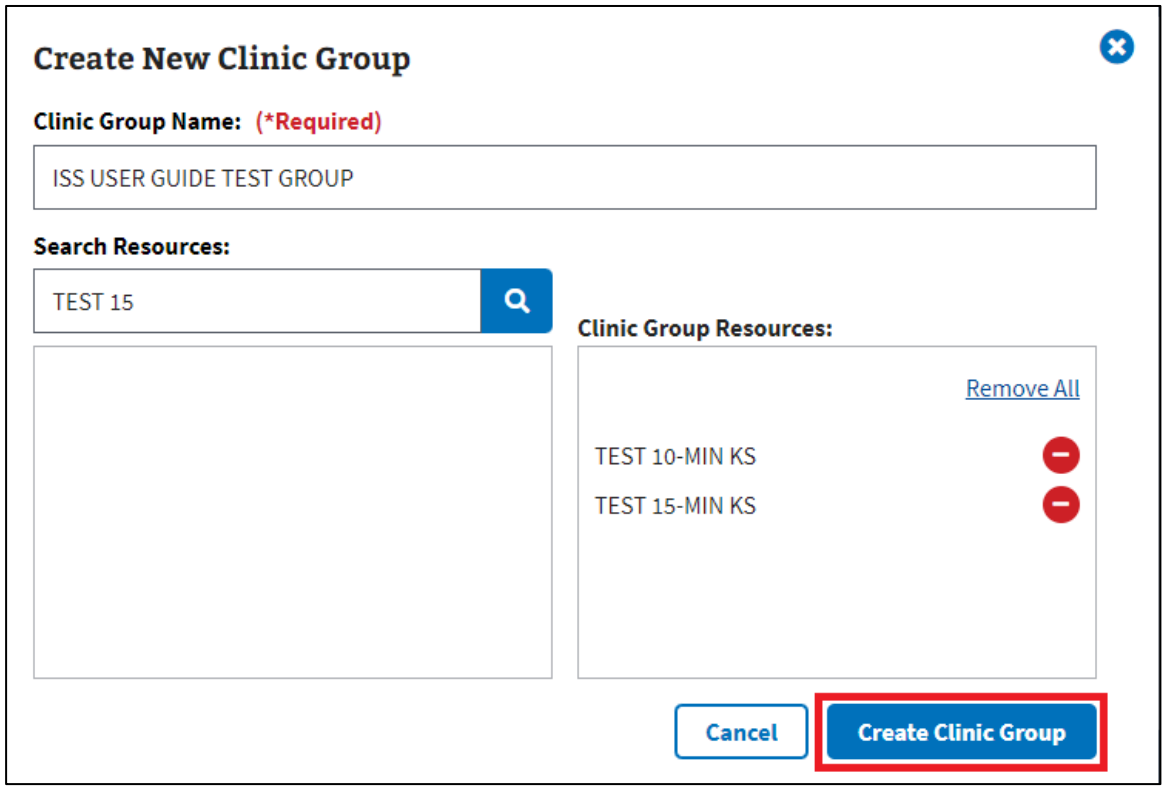


Figure 311: Create Clinic Group Button

7. The user will be brought to the Successfully Created Clinic Group window shown in **Figure 312** below. Select close to finish.

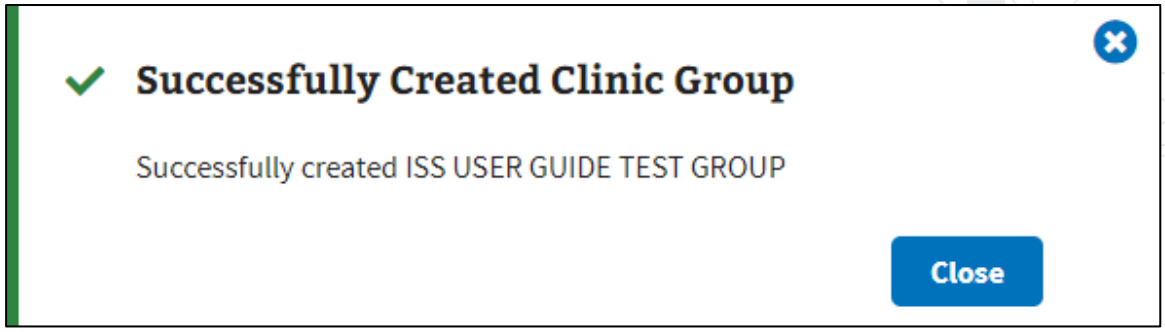


Figure 312: Successfully Created Clinic Group Window

7.3 Activity Report

1. To access the Activity Report, the user will need to select the "Activity Report" tab seen in **Figure 313**.

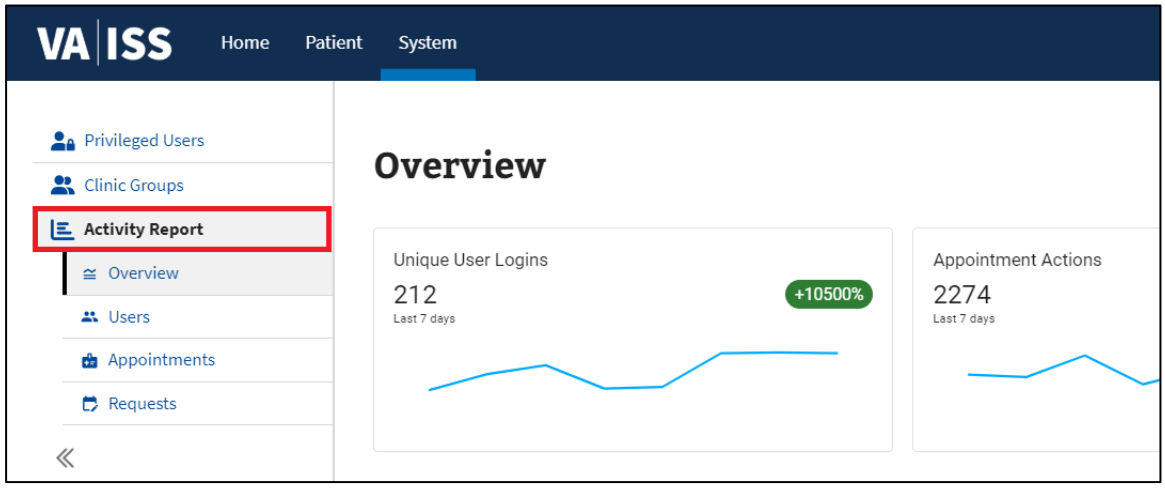


Figure 313: Activity Report Tab

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 314** to access them.

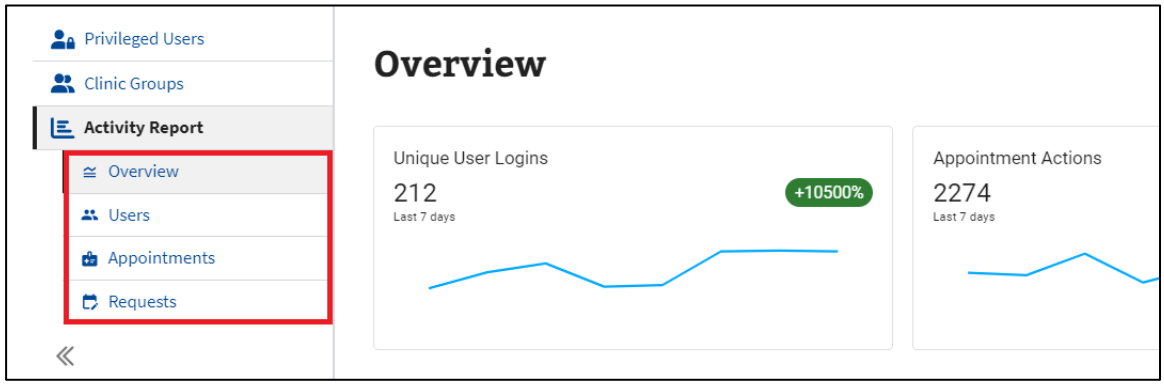


Figure 314: Sub-Tabs for the Activity Report

3. Within the sub-tabs, the user can navigate the graphs and tables for information relating to each section's title (see **Figure 315** for example).

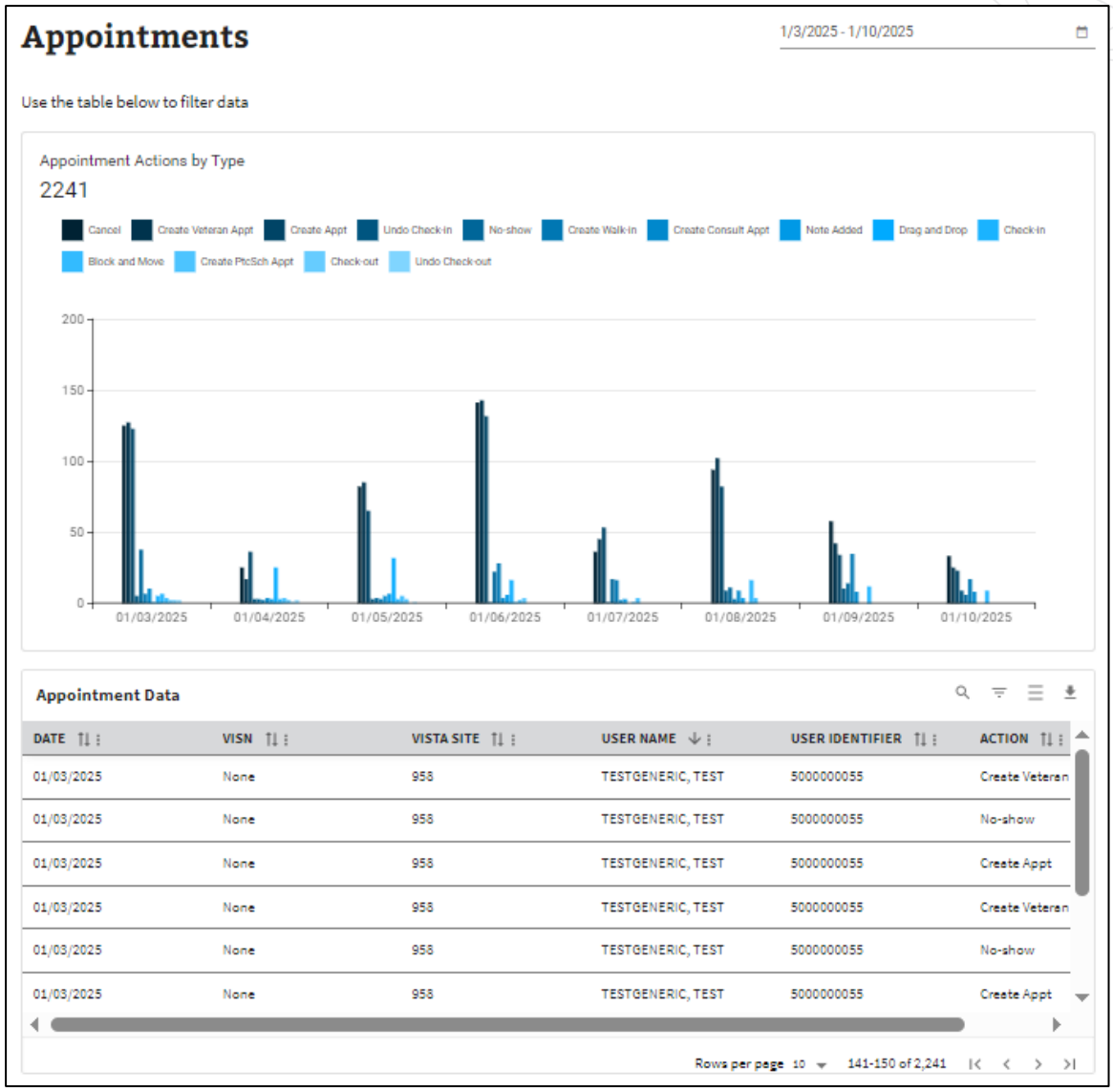


Figure 315: Example of Data within Activity Report Sub-Tabs

- *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 316**).

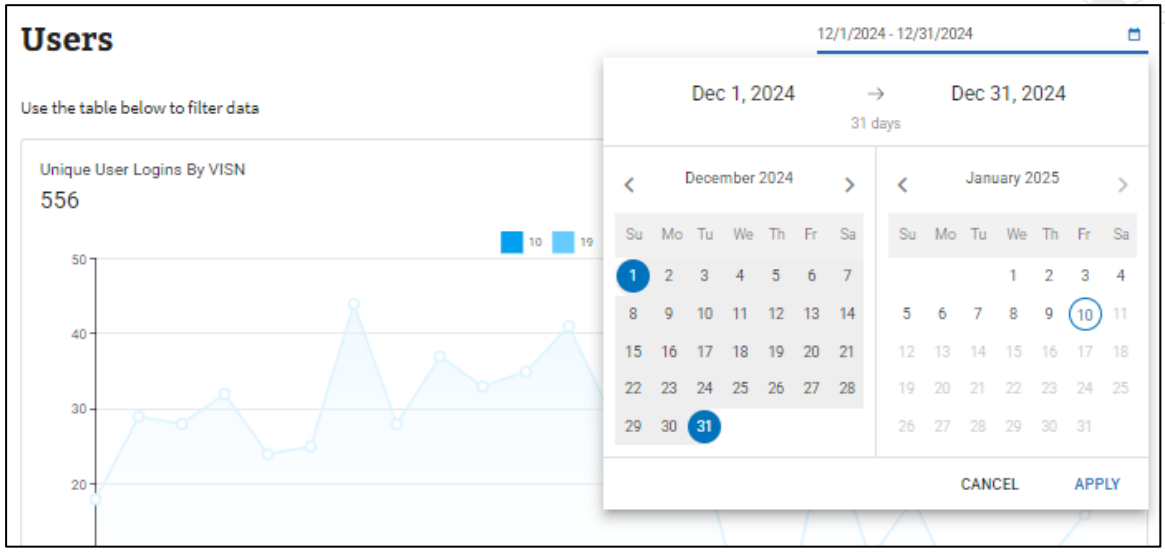


Figure 316: Date Range Calendar Dropdown for Activity Report

- ❖ *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 317**, to receive more context about the information being shown.

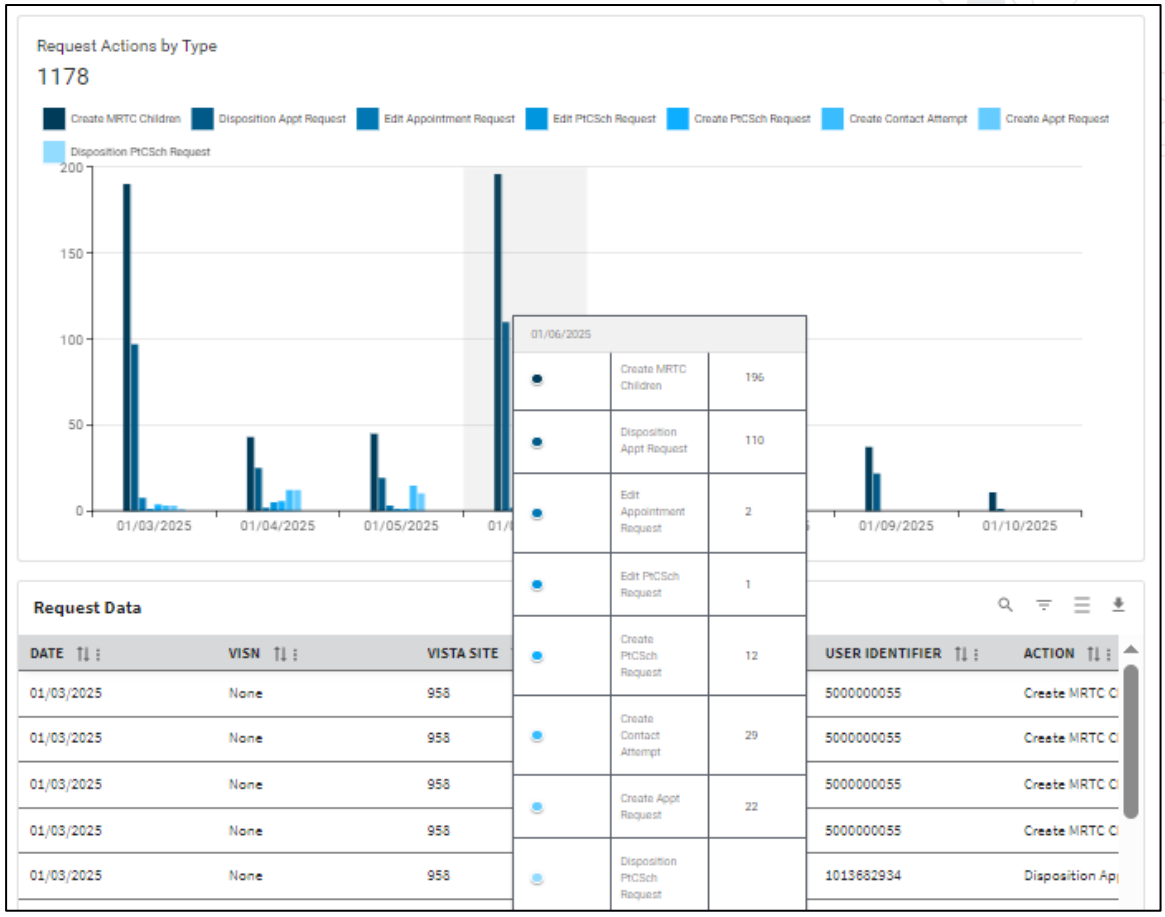


Figure 317: Data Point Information on Activity Report Graphs

6. The user can also export data of any table within the tabs by selecting the “Export” button seen in **Figure 318**. The user will then be prompted to open or save an Excel worksheet, where the ability to print the information is accessible.

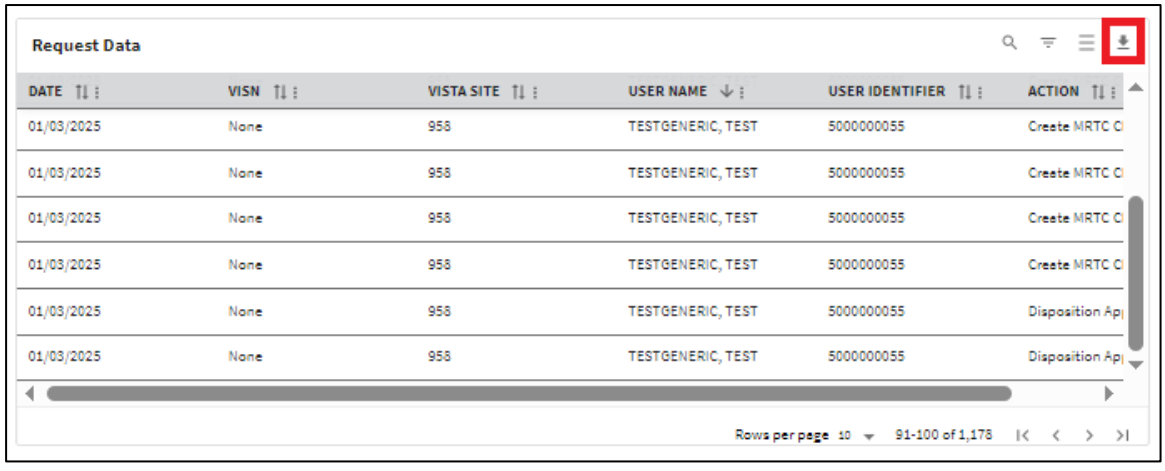


Figure 318: Export Button for Activity Report

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
Inpatient Status	Clinic	Yes
Other	Clinic and Patient	Yes
Pandemic	Clinic and Patient	Yes
Patient Death	Clinic	No
Patient Not Eligible	Clinic	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