

# **VS GUI User Guide Addendum**

Release 1.7.1 Update





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



Enterprise Program Management Office

# **Revision History**

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





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# **1** Introduction

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

## 1.1 Purpose

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

## 1.2 Overview

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

# 1.3 Disclaimers

### 1.3.1 Software Disclaimers

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# 1.3.2 Documentation Disclaimers

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# 1.4 Project References

#### 1.4.1 Information

The VS GUI points of contact (POCs) include:

#### » **REDACTED**

#### **VSE** Resources

- » Veterans Health Administration (VHA) VSE SharePoint: REDACTED
- » VA Software Document Library (VDL) Scheduling (VSE manuals near the bottom):
- » National Return to Clinic (RTC) Order: REDACTED





# 2 System Summary

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

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

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

# 3 Key Feature Update in Version 1.7.1

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

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

Tasks Name: Gender: Ward: PCP: Search:	System Re Patient Type: Street Address: Svc Connected: MHP:	ports		DOB: City/State: Sc Percent: Phone: Search	Clear	New Req.	Date 7	Clinic 🟹 Stat	us V			Print Export Reload Query	User Preferences	VS GUI Key VS GUI Res Contact VS Veterans Cr OIT Helpde	board Shortcu ources E Program Off isis Line - (800 sk - (855) 673	ts ice )) 273-8255 ×1 -4357			
(	Se	ect Patie	nt			Actions	Pendin	g Appointmer	its	Special Needs/	Preferences	Tools	Preferences		Help				=
REQUEST V	WAIT TIME >=90	Da *	PATIEN	T NAME			V SSN	CA	PHONE	CA LETTER V	MRTC SCV	ISIT 🕅 TE	LEPHONE	PRIORITY V	PID V	ENTERED V	REQUESTOR	REQUESTED	
CONSULT	1136				APPT/	ETERAN Disp	osition 🕨	View Re	quest						04/12/2017	04/12/2017	PROVIDER	FTC PACT TE	
APPT	1121				EWL D	isposition	÷	Edit Rec	uest			1			10/02/2017	04/27/2017	PATIENT	PATIENT	
CONSULT	906			4	-						-	_			11/28/2017	11/28/2017	PROVIDER	CHY PACT G	
CONSULT	904				Contac	t Attempts		Transfe	to EWL			_			02/14/2018	11/30/2017	PROVIDER	CHY GYN CL	
CONSULT	851				PtCSch	Disposition		Death				_			05/20/2018	01/22/2018	PROVIDER	00-DOCUME	
CONSULT	848						*SE	Remove	d/Non-	VA Care					01/25/2018	01/25/2018	PROVIDER	CHY OCCUP	-
•								Remove	d/Sche	duled-Assigned									
	H		_				'Recall' has	Remove	d/VA C	ontract Care	tered Schei	duling)						lage 1 c	1
-	May - 2020		•	Schedules				Remove	d/No Li	onger Necessary									
Sun Mon	Tue Wed Thu	Fri	Sat					Entered	in Error										
26 27	28 29 30	1	2																
3 4	5 6 7	8	9																
10 11	12 13 14	15	16																
17 18	19 20 21	22	23																
24 25	26 27 28	29	30																
31 1	2 3 4	5	•																
Clinic Sched	Chard Inc. Description	Calmanda da	· · ·																

Figure 1: Display CPRS Consult Tab Details.



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

Patient Consult Detail - 1	-		×
Current PC Provider:			^
Current PC Team: TEAM FTC 2			
Current Pat. Status: Outpatient			
Primary Eligibility: SERVICE CONNECTED 50% to 100%(VERIFIED)			
Patient Type: SC VETERAN			
OEF/OIF: NO			
Service Connection/Rated Disabilities			
SC Percent: 100%			
Rated Disabilities: BIPOLAR DISORDER (100%)			
IRRITABLE COLON (10%)			
HEMORRHOIDS (0%)			
Order Information			
To Service: PHARM.AC.INTERRUPTION.OUTPT			
From Service: CHY ANTICOAG			
Requesting Provider:			
Service is to be rendered on an OUTPATIENT basis			
Place: Consultant's choice			
Urgency: Routine			
Clinically Ind. Date: Jan 29, 2018			
Orderable Item: PHARM.AC.INTERRUPTION.OUTPT			
Consult: Consult Request			
Provisional Diagnosis: DVT			
Reason For Request:			
***ANTICOAGULATION INTERRUPTION (BRIDGE THERAPY) CONSULT***			$\sim$
		0	к

Figure 2: Patient Consult Detail Window – 1.

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

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Patient Consult Detail - 1	-		×
Reason For Request:			^
MADE IN VISTA PROCESSED IN GUI			
Inter-facility Information			
This is not an inter-facility consult request.			
Status: ACTIVE			
Last Action: STATUS CHANGE			
Facility			
Activity Date/Time/Zone Responsible Person Entered By			
CPRS RELEASED ORDER 03/20/20 09:22 PATEL, PRANSHUKUMA PATEL, PRANSHUKUMA			
CHY CARDIOLOGY Consult Appt. on 03/20/20 @ 03:00			
CONSULT SCHEDULED FROM VISTA			
STATUS CHANGE 03/20/20 11:43 PATEL, PRANSHUKUMA PATEL, PRANSHUKUMA			
CHY CARDIOLOGY Appt. on 03/20/20 @ 03:00 was a no-show.			
Note: TIME ZONE IS local if not indicated			
No local TIU results or Medicine results available for this consult			
======================================			
			~
		0	K

Figure 3: Patient Consult Detail Window – 2.

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

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

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Name: Gender: Ward: PCP: Search:	ks S Pa St Sv M	ystem atient Ty reet Adi vc Conne IHP:	Rep pe: dress: ected: Sele	oorts ect Patie	nt	C S F	XOB: City/State ic Percer thone: Search	t:	New Req.	Date T Clin	ic 귟 Status 귝 ppointments	Special Needs	/Preferen	Prin Expo Relov Que	t ort ad User Preferences	VS GUI Ke VS GUI Re Contact V Veterans C OIT Helpd	yboard Shortcu sources SE Program Off risis Line - (800 esk - (855) 673  Help	<u>tts</u> fice )) 273-8255 x -4357
REQUEST	WAR	T TIME :	=90 D	a •	PATIENT	NAME				V SSN	CA PHONE	CALETTER V	MRTC	SCVISIT T	TELEPHONE	PRIORITY	PID T	ENTERED V
CONSULT	1136										1				(999) 999-9999		04/12/2017	04/12/2017
APPT	1121										11	05/20/2020		1	(555) 555-5555		10/02/2017	04/27/2017
CONSULT	906														(444) 444-4444		11/28/2017	11/28/2017
CONSULT	904														(444) 444-4444		02/14/2018	11/30/2017
CONSULT	851														(777) 777-7777		05/20/2018	01/22/2018
CONSULT	848														(777 (777)		01/25/2018	01/25/2018
4    ( )	H	1ay - 20	20		•	Schedu	iles			ll "Recall" has bee	in renamed to "Pto	CSch" (Patient Co	entered	Scheduling)				
Sun Mo	n Tue	Wed	Thu	Fri	Sat													
26 27	28	29	30	1	2													
3 4	5	6	7	8	9													
10 11	12	13	21	22	23													
24 25	26	27	28	29	30													
31 1	2	3	4	5	6													
Clinic Sche	dules				<													
Clini	c Schedu	eles Pro	vider S	chedule	15 Y													

Figure 4: CID Date Label Updated To PID in RM View.

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

Patient Information				
Name		DOB	SSN	
Gender		Institution	Originating Date	
Male		CHEYENNE VA MEDICAL	04/27/2017	
Originating User		Priority Group	Ethnicity	
Race		Address	City	State Zip Code
	~			WY ~
Country		Phone (residence)	Phone (work)	
Country United States	v	Phone (residence) (555) 555-5555	Phone (work)	
Country United States Bad Address? Special Needs/Preferences	¥	Phone (residence) (555) 555-5555	Phone (work)	Veteran
Country United States Bad Address? Special Needs/Preferences NOTE:	v Ctrl-p t	Phone (residence) (555) 555-5555 o Edit the Patient Information / Speci	Phone (work)  Svc Related al Needs / Preferences	Veteran
Country United States Bad Address? Special Needs/Preferences NOTE: Request Information Clinic Service/Special	Ctrl-p t	Phone (residence) (555) 555-5555 ••••••••••••••••••••••••••••••	Phone (work)  Svc Related  Appointment Type	Veteran
Country United States Bad Address? Special Needs/Preferences NOTE: Request Information Clinic Service/Speciali CHY AUDIO TECH CLEANING	Ctrl-p t	Phone (residence) (555) 555-5555 ••••••••••••••••••••••••••••••	Phone (work)  Svc Related  Needs / Preferences  Appointment Type  REGULAR	Veteran
Country United States Bad Address? Special Needs/Preferences NOTE: Request Information Clinic Service/Special CHY AUDIO TECH CLEANING Requested By	Ctrl-p t Ity (	Phone (residence) (555) 555-5555 ••••••••••••••••••••••••••••••	Phone (work)  Svc Related  Needs / Preferences  Appointment Type  REGULAR  Status	Veteran

*Figure 5: CID Date Label Updated To PID in Appointment Request.* 



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

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

Patient Information											
Name	DOE						\$	SSN			
Gender	Insti	tution					(	Origina	ating Date		
Male	CHE	YENNE	VA N	IEDIC	AL			05/22/	2020		
Originating User	Prio	rity Gro	up				1	Ethnici	ty		
	GR	DUP 3					~	HISPA	NIC OR LATI	NO	v
Race	Add	ress					(	City		State	Zip Code
	~									WY ~	
Country	Pho	ne (resi	dence	e)			F	Phone	(work)		
United States	v (111	) 111-1	111								
Bad Address?					Y			5	Svc Relate	d 🔲 ۱	Veteran
Bad Address?					~				Svc Relate	d 🔲 Y	Veteran
Bad Address?	-p to Edit	the Pa	tient	Inform	nation	/ Spe	cial N	Needs ,	Svc Relate	d 🔲 1	Veteran
Bad Address?	-p to Edit PID	the Pa	tient l	Inform	- nation	/ Spe	cial N	Needs /	Svc Relate	d 🛄 ۱	Veteran
Bad Address? Special Needs/Preferences NOTE: Ctrl Request Information Clinic Service/Specialty CHY ANTICOAG	-p to Edit PID	the Pa Date: 18/202	tient l	Inform	nation	/ Spe	cial N	Needs / Appoir REGUI	Svc Relate Preferences ntment Type LAR	d 🗌 ۱	Veteran
Bad Address?  Special Needs/Preferences NOTE: Ctrl Request Information Clinic Service/Specialty CHY ANTICOAG Requested By	-p to Edit PID	the Pa Date: 18/202	tient I	Inform	- 2020	) / Spe	cial N	Needs , Appoir REGUI	Svc Relate / Preferences htment Type LAR	d 🗔 1	veteran
Bad Address? Special Needs/Preferences NOTE: Ctrl Request Information Clinic Service/Specialty CHY ANTICOAG Requested By PATIENT	-p to Edit PID	the Pa Date: 18/202 Sun	tient l 0 Mon	Inform June Tue	- 2020	) Thu	cial N	Needs / Appoir REGUI	Svc Relate / Preferences htment Type LAR	d 🗌 1	Veteran v
Bad Address?	-p to Edit PID 06/	the Pa Date: 18/202 Sun 31	tient l 0 Mon 1	Inform June Tue 2	- 2020 Wed 3	) Thu 4	cial N Fri 5	Needs , Appoir REGUI Sat 6	Svc Relate Preferences itment Type LAR	d 🔲 1	Veteran
Bad Address?	-p to Edit PID • 06/ • 23 24	the Pa Date: 18/202 Sun 31 7	tient l 0 Mon 1 8	Inform June Tue 2 9	- 2020 Wed 3 10	7 Spe 7 Thu 4 11	cial N Fri 5 12	Appoir REGUI Sat 6 13	Svc Relate / Preferences htment Type LAR	d 🗌 1	veteran
Bad Address?	-p to Edit PID 06/ 23 24 25	the Pa Date: 18/202 Sun 31 7 14	tient I 0 Mon 1 8 15	June Tue 2 9 16	- 2020 Wed 3 10 17	7 Spe 7 Thu 4 11 18	cial N Fri 5 12 19	Appoir REGUI Sat 6 13 20	Svc Relate / Preferences htment Type LAR	d 🔲 1	Veteran V

Figure 6: PID Can Be Updated To Reflect Change After Cancellation By Patient.

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

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

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Cancel Appointment			-		×	
Appointment Cancelled By Cancelled by Clinic Cancelled by Patient	Remarks (Optional)				~	
Reason for Cancellation (Select one) DEATH IN FAMILY OTHER						
PANDEMIC TRANSFER OPT CARE TO OTHER VA TRAVEL DIFFICULTY UNABLE TO KEEP APPOINTMENT WEATHER						
PID Date:						
05/29/2020						
					~	
		_	ОК	Can	cel	

Figure 7: PANDEMIC As Cancellation Option.

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

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

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VistA	Schedulin	ng															
														VistA Sch	eduling for Di	vision: I	JNASSIGNE
	Tasks	System	Reports														
Name: Gender:	м		Patient Typ Street Add	De: SC VETE Iress:	RAN	DOB: City/State:		New Req.	Da	ate	Clinic		T	Status	খ	1	UESDAY
Ward:			Svc Conne	cted: YES		Sc Percent: 1	0		Ju	an 23, 2020@00:0	1 CHY	ACUTE CA	RE 2	NO ACTION TAK	KEN		REMARKS:
PCP:			MHP:			Phone: (a	222) 222-2222		Ju	in 24, 2020@00:0	1 CHY	ACUTE CA	RE 2	CANCELLED BY	PATIENT	_	ADDED DA
Search:					*	Search	Clear		Ju	in 24, 2020@03:00	0 CHY	ACUTE CA	RE 2	NO ACTION TAK	KEN	-	
			1	Select Patient				Actions				Pending	Appointm	ients		4	pecial Nee
REOLI	EST T	WAIT TIME	<30 Dave	PATIENT N	AME			T SSN	- [		TTER T	MRTC				PID	T EN
APPT	2	7	450 Duys	TAIL THE				1 5511	-	CATHORE CALL	annen a	intre .		(222) 222-2222	GROUP 3	06/2	5/2020 06
1		.,					APPT/VETER4	N Disposition	•					(666) 666 6666	UNDOI 5	00/2	1/2020 00/
							EWL Disposit	ion	•								
							Contact Atter	npts									
							PtCSch Dispo	sition	•								
14 4	I I	]											"Rec	all" has been rena	med to "PtCS	ch" (Pat	ient Centere
			Juby 20	20			Schedules										
- Curr			July - 20	ZU	<b>5</b> -1	Cat.											
28	2	9 3	0 1	2	3	4											
5	(	6 7	8	9	10	11											
12	1	3 1.	4 15	16	17	18											
19	2	20 2	1 22	23	24	25											
26	2	27 2	8 29	30	31	1											
Clinks	Cabadad	3 4	5	0	/	8											
Clinic	Schedule	es				、 											
(Selec	ct a Clinic	:)				-											

Figure 8: Display Contact Attempt Information In The RM Grid.

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



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est Information						
Patient Name:				Clinic Name: CI/T CHY TEST1.7.1		
Desired Appt Date:	06/25/2020			Request Type: APPT		
Home Phone:	(222) 222-2222			Cell Phone: (222) 222-2222		
Work Phone:						
Contact Attempt						
Contact Type:	Call     Call     Call					
Date/Time:	07/22/2020 . 15:46:04					
Comments:						
			Submit			
tact Attempts						
tact Attempts						
Drag a column header and drop	it here to group by that column					
act Attempts Drag a column header and drop Attempted Date/Time	t here to group by that column	₹ Type	∀ Comments	T Entered By	Entered Date/Time	Ŧ
Charact Attempts Drag a column header and drop Attempted Date/Time 7/22/2020 3:45:08 PM	there to group by that column	⊽ Type Call	Comments CALLED PATIENT TEST	T Entered By	Thereous Date/Time           7/22/2020 3:46:04 PM	8

Figure 9: New Contact Attempt Entry Window.

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

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



Figure 10: RM Grid View For "View Only" Users.



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								-		×
uest Information										
Patient Name:					Clinic Name:	GLY PACT TEAM 3	PRE-VISIT AM			
Desired Appt Date:	04/04/2018				Request Type:	PtCSch				
Home Phone:	(888) 888-8888				Cell Phone:	(777) 777-7777				
Work Phone:										
Contact Attempt										
competizioni pe										
Contact Type:	Call     Call     Call	tter								
Data (Times)	06/02/2020	0	12,20,14							
Date/Time:	00/03/2020		15:20:14							
Comments:	00/05/2020		13:20:14							
Comments:	00/03/2020		13:20:14							
Comments:	00/05/2020		13:20:14							
Comments:	00/03/2020		13:20:14							
Comments:	00/05/2020		13:20:14		Su	bmit				
Comments:	00/05/2020		13:20:14		Su	bmit				
Comments:	00/03/2020		13:20:14		Su	bmit				
Comments:	00/03/2020		13:20:14		Su	bmit				
Lact Attempts	here to group by that c	olumn	3:20:14	7	Su	bmit	7			
Lact Attempts Drag a column header and drop it Attempted Date/Time	here to group by that c	olumn V Ty	pe 7	Comments	Su V Entered	bmit By	T Entered Date/Ti	me	V	
Lact Attempts Trag a column header and drop in Attempted Date/Time 6/3/2020 1:43:45 PM	here to group by that of	olumn T Ty Ci	pe 7	✓ Comments CALLED HOME PHONE TTTT	Su V Entered	bmit By	₹ Entered Date/Tii 6/3/2020 1:45:22	me 2 PM	¥	

Figure 11: Contact Attempt View For "View Only" Users.

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

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

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

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- PID
- Entered
- Requestor
- Requested By
- Clinic/Service
- Comment

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

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

"Re 🔃 User Login	O STATES RTMENT OF VETERA	× 1g)	
User Access Rights The version of VS GUI th 1.7.0.1 R1 immediately.	nat you are using is not cur	rrent. Install version	
[v1.7.0 R44]	Please Select of For Help with PIV Io OK	Certificate	

Figure 12: Wrong VS GUI Version Error Message.

