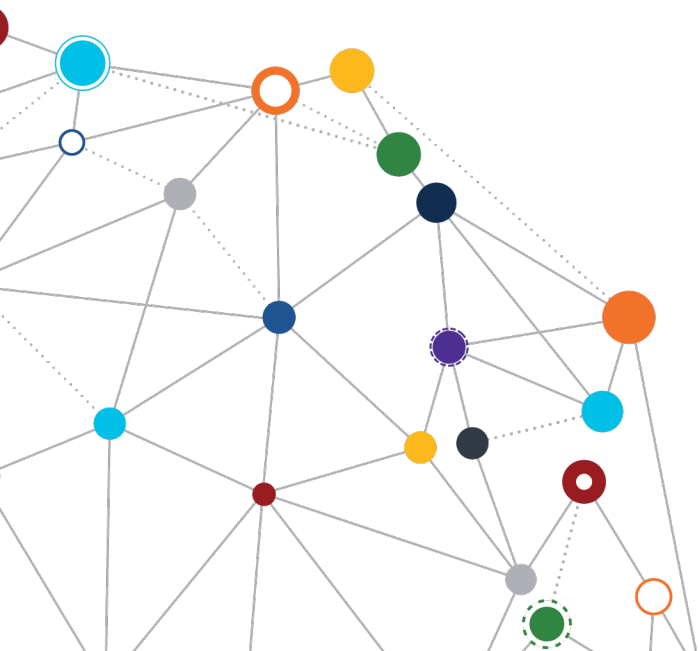# VSE for Clinical Staff User Guide

Version – 1.15

U.S. Department of Veterans Affairs

Office of Information and Technology

Enterprise Program Management Office

Revision History

Date	Revision	Description	Author
12/14/2022	1.15	Updated the document with section 5.2.2 Updates Check in and Check Out Status Logic	VSE PMO Booz Allen Hamilton
10/19/2022	1.14	Updated the document with section 5.7 Displays Checkout Time and Indicator.	VSE PMO Booz Allen Hamilton
09/28/2022	1.13	Added section 6.3 Pop-up Message to Ensures Users are Running Current Version. Updated 6.1 Enhanced Error message section to include the new error message logic.	VSE PMO Booz Allen Hamilton
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08/22/2022	1.8	Updated document to include the following new functionalities: Display Fugitive Felon, Local/National and Restricted Record Flags,	VSE PMO Booz Allen Hamilton

Date	Revision	Description	Author
		and Enhanced Error Messages.	
08/10/2022	1.7	Updated Section 5.3 Daily Workflow List to include the Memo functionality.	VSE PMO Booz Allen Hamilton
06/14/2022	1.6	Updated Section 5.4 Medication List and Pre-Visit Summary with Sensitive record pop-up page.	VSE PMO Booz Allen Hamilton
05/12/2022	1.5	Updated the document with Test Patient Screenshots	VSE PMO
03/03/2022	1.4	Accepted all recommended changes and finalized the document	VSE PMO Liberty IT Solutions
03/01/2022	1.3	Updated the document with Medications List, Pre-Visit Summary, and Alert Notifications.	VSE PMO Liberty IT Solutions
02/08/2022	1.2	Final review/proofread and accepted all recommended changes	VSE PMO Liberty IT Solutions
01/28/2022	1.1	Developers Review	VSE PMO Liberty IT Solutions
12/30/2021	1.0	Baseline for VSECS	VSE PMO Liberty IT Solutions

Table of Contents

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★★★★★

1   Introduction

The Department of Veterans Affairs (VA) Veterans Health Information Systems and Technology Architecture (VistA) Scheduling Enhancement for Clinical Staff (VSECS) module is a VA-internal web application that allows clinical staff to track patient appointments from check-in, through the clinic workflow, and to a completed appointment.

1.1   Purpose

The Veterans Health Administration (VHA) Office of Veterans Access to Care (OVAC) requested VSE for Clinical Staff, a new web application to improve overall Veteran check-in experience and reduces operating costs for VHA.

1.2   Overview

VSECS is a VA-internal web application that allows staff at VA clinics to manage appointment workflow at a clinic or set of clinics. Users can customize the application to display daily appointments for a specific group of clinics and save multiple personal clinic lists. Users can also view and update appointments by workflow status. Refer to **System Summary** for a more detailed description of VSE for Clinical Staff functionality.

1.3   Disclaimers

1.3.1   Software Disclaimers

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties, and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgement if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

1.3.2   Documentation Disclaimers

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

1.4   Project References

1.4.1   Information

The VSECS points of contact (POCs) include:

- » OIT ESE - Scheduling Support
- » OVAC Program Office – <mark>REDACTED</mark>
- » TeleHealth & Scheduling Technical Director – <mark>REDACTED</mark>
- » OVAC Emerging Technologies Acting Legacy Program Manager – <mark>REDACTED</mark>
- » OVAC Emerging Technologies VSE Subject Matter Expert (SME) – <mark>REDACTED</mark>

VSECS Resources

- » VA Software Document Library (VDL) –
  https://www.va.gov/vdl/application.asp?appid=100

1.4.2   Help Desk

Refer to Section 6 for additional information.

2   System Summary

VSE for Clinic Staff is a web-based, cloud-hosted application that assists with accessing and managing appointment workflow at a clinic or set of clinics. It consists of three primary functions: Daily Appointment List, Daily Workflow List, and Clinic List Management. The Daily Appointment List tracks appointments for all the clinics available under the Clinic List. The Daily Workflow List shows the current workflow status a patient is in and allows the user to track and change the status of the workflow. The Clinic List Management allows clinicians to group clinics into one manageable list.

3   User Access Levels

VSE for Clinical Staff is accessible to any VA network user who has a Personal Identity Verification (PIV) card and Identity and Access Management (IAM) account provisioned to a VistA station.

- Schedulers are required to have the SDECRPC Menu Option. All scheduling personnel should already have the menu option.
- Non-Schedulers, Nurses, and Providers are required to have SDECRPC Menu Option and SDECVIEW Key.

4   Getting Started

To access the VSE for Clinical Staff application, the user follows these initial process steps:

4.1   Logging into VSE for Clinical Staff

1. To access VSECS, type https://staff.apps.va.gov/vsecs/ into the address bar of a Chrome or Edge browser.
2. A Login window displays; click "sign in with VA PIV Card" to sign in using your PIV.
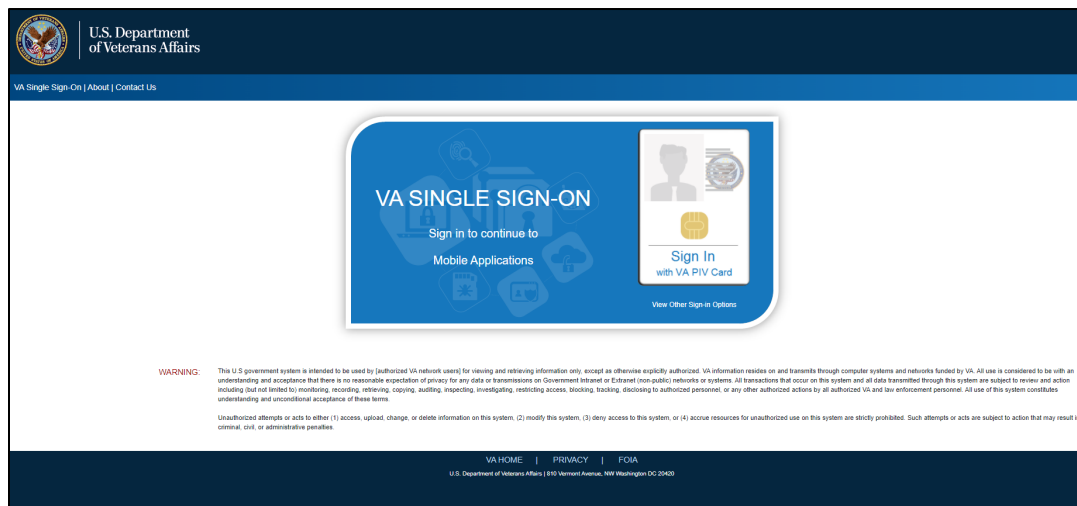

Figure 1: Single Sign-On Internal (SSOi) Login.

3. If login validation is successful, the VSE for Clinical Staff home page will be displayed.

Figure 2: VSECS Home Page

5 Using the Application

This section describes VSECS functions inside the Daily appointment list, Daily workflow list, and Clinic list management, and how to use these tools to create, edit, view, and track patient workflow status.

5.1 Clinic List Management

5.1.1 Create New Clinic List

Creating a clinic list allows the clinicians to group clinics into one manageable list. If you haven't created a Clinic List, the appointment list view and Workflow List will not be accessible. After successfully logging into VSECS, follow the steps below to create a new clinic list:

1. From the VSECS home page left navigation, click on Clinic List Management. If you haven't created a Clinic List before it will redirect you to the Create Clinic List page, **Figure 4: Create a Clinic** List, to create a Clinic List. If you have created a Clinic List before, the Clinic List Management page displays with the list of Clinics as shown on **Figure 3: Clinic List Management**.
2. From the Clinic List Management page, click on Create New Clinic List and the Create Clinic List page will be displayed as shown on **Figure 4: Create a Clinic** List
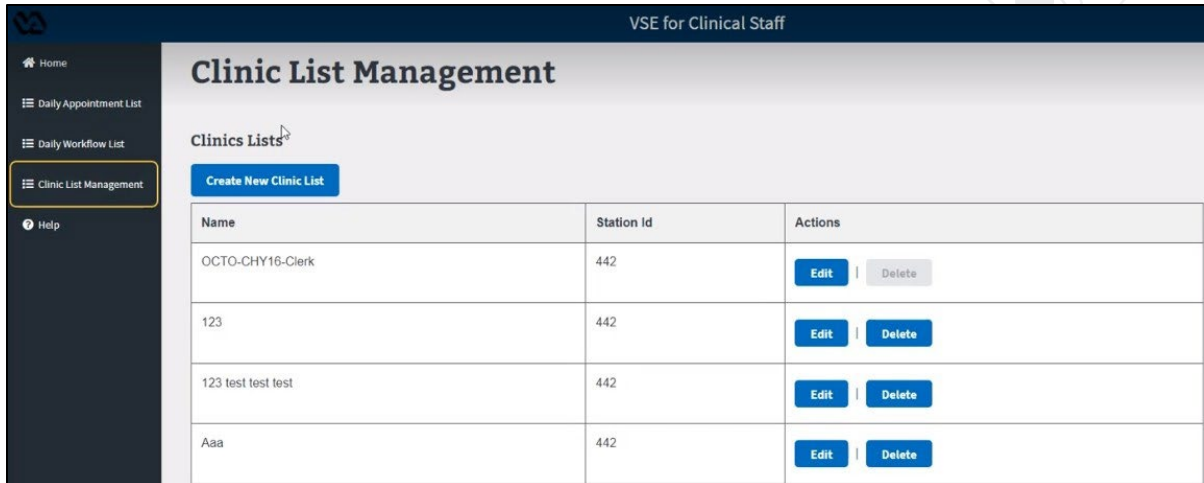
Figure 3: Clinic List Management
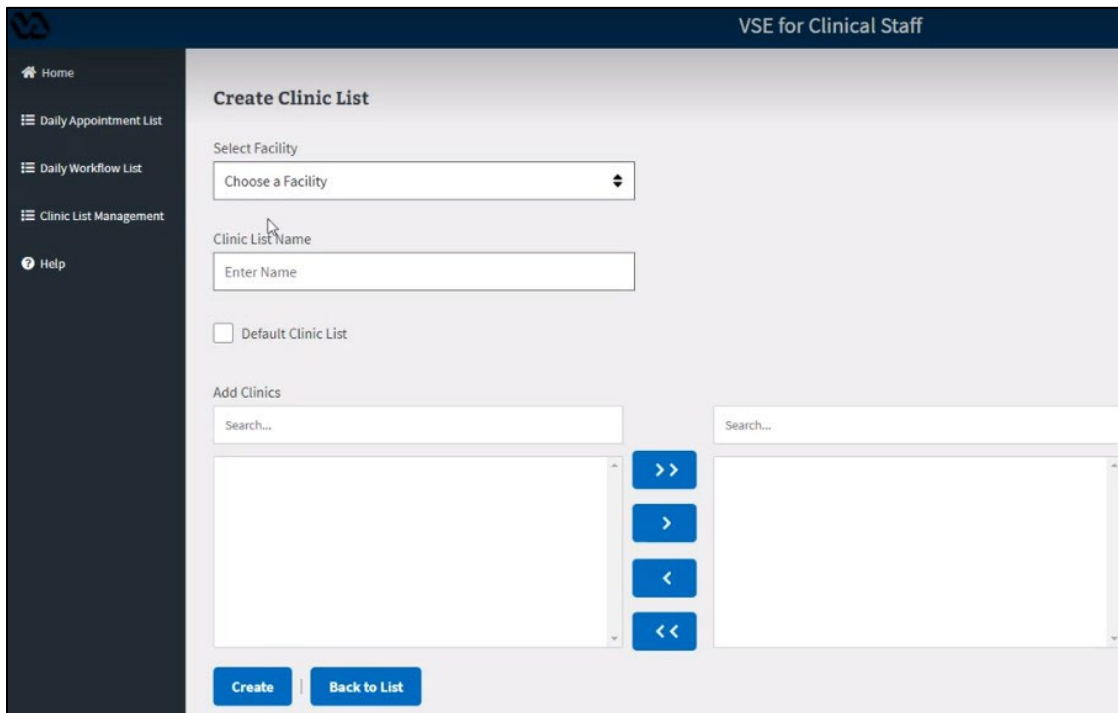
Figure 4: Create a Clinic List

3. On the Create Clinic List Page:

   a. From the top, click on the Select Facility drop-down menu to choose a facility. The clinics under that facility will be populated inside the Add Clinics multi-text box on the bottom left corner.
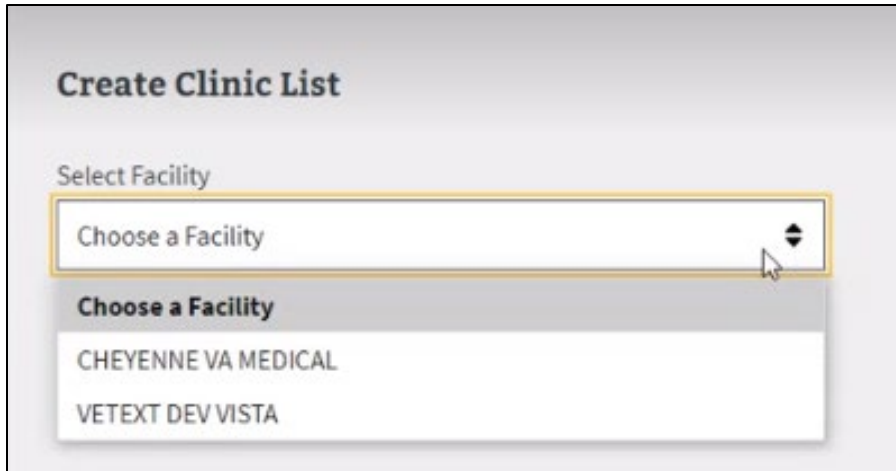
Figure 5: Create Clinic List: Choosing a Facility

b. Enter a name for your Clinic List. If this is your first time creating a Clinic List, it will automatically become the default Clinic List. Select the Default Clinic List check box to set the new Clinic List as your default Clinic List. Note: There can only be one Default Clinic List.
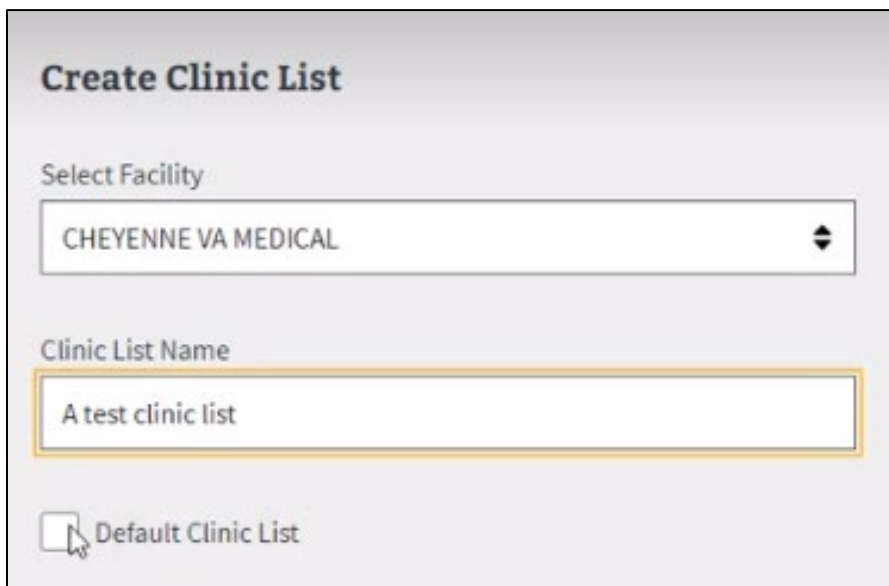
Figure 6:   Create Clinic List: Setting a Clinic List as Default

c. Type in the search bar to narrow down the Clinic List as shown below.
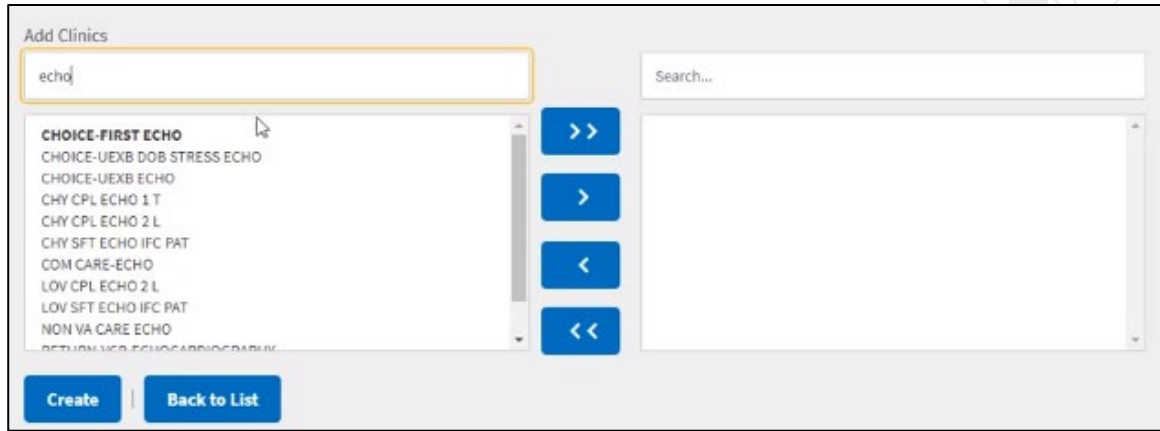
Figure 7: Create Clinic List: Searching for Clinics

    d. The final step before creating the list is to add the clinics to your list. Select the list of clinics from left side and use the buttons to move the selection or everything across to the right. You can only add up to 50 clinics to your new list. Finally, click on the Create button to create the new Clinic List.
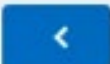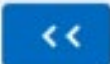
Button	Description
>>	Adds all the clinics on the left to the right side of the Clinic List.
>	Adds selected clinics on the left to the right side of the Clinic List.
<	Removes selected clinics from the right side of the Clinic List to the left.
<<	Removes all clinics from the right side of the Clinic List to the left.

Figure 8: Create Clinic List Actions

Figure 9: Create Clinic List: Adding Clinics to the New Clinic List

5.1.2 Edit/Delete Personal Clinic List

Once a Clinic List has been created, it can be edited by adding or removing clinics from the List.
To edit a personal Clinic List:

1. Navigate to the Clinic List Management Page to see a list of personal Clinic Lists.

Figure 10: Clinic List Management Page

2. Click the Edit button of the personal Clinic List you want to edit to display the Edit Clinic List Page. After making the changes, click the Save List button to save the changes to the personal Clinic List. Click the Back to List button to exit the Edit Clinic Page without making any changes to the Facility or Clinic Name of the list. **NOTE:** When moving the clinics from the left to the right side of the Clinic List it automatically saves the changes.

Figure 11: Editing a Clinic List

3. To delete a Clinic List, from the Clinic List Management Page, click the Delete button of a personal Clinic List. The Delete Clinic List Page displays asking if you want to delete the list. Click either the Delete List button or the Back To List button to cancel the action. **NOTE:** Your default personal Clinic List can't be deleted; the Delete button is always disabled for that list.

Figure 12: Delete a Clinic List

5.1.3 Validating User Access to VistA Instances

VSECS will validate a user's clinic list access upon app load. Clinics that the user no longer has access to will be removed from the dropdown on the Daily Appointment List and Daily Workflow List. Additionally, the clinics the user no longer has access to will only be able to be deleted within the Clinic List Management page to indicate the user no longer has access to that clinic as shown below.

Figure 13: Example of a User with No Access to the Clinic List

5.2 Daily Appointment List

Once the clinic list is created, it will show up in the daily appointment list for the clinical staff to view and track.

The Daily Appointment List displays all the appointments for that day, for all the clinics you have under the Clinic List. It tracks patient attributes like Current Pre Check-In Step, Pre-Check-In status, E-Check-In status, Demographics, and Insurance indicators.

Use the drop down button to select a different Clinic List to see the clinics and appointments under those clinics.

The up and down arrows next to the column headers allow you to sort based on the type of column.

Note: The insurance column on the Daily Appointment List will not show for MANILA-RO Station ID 358.

Figure 14: Daily Appointment List

5.2.1 Printing the Daily Appointment List

To print your Daily Appointment List, click the Print button on the right corner of the Daily Appointment List table and you will be able to save the Daily Appointment List in PDF format.

Figure 15: Printing the Daily Appointment List in PDF Format

Figure 16: Printed PDF Format of the Daily Appointment List

5.2.2 Updates Check in and Check Out Status Logic

The Daily Appointment List and Daily Workflow List will show if an appointment has been checked in and if an appointment has been fully checked out. Appointments that were checked in and checked out will display both statuses and times.

Figure 17: Daily Appointment List with the new Check in and Check Out Logic

Figure 18: Not Checked in

Figure 19: Checked In but not checked out

Figure 20: Checked out with Act Req

| 10:30 | ✔ Checked In at 11:00
✘ Checked Out at 11:00 | CHY CARDIOLOGY | SQA,DTEST | 1977-11-05 | No Check-In Steps Started | ✘ PRE-CHECK-IN NOT STARTED | ✘ E-CHECK-IN NOT STARTED | ✘ Needs Update | |

Figure 21: Completely Checked out

| 11:00 | ✔ Checked In
✘ Checked Out at 11:03 | CHY CARDIOLOGY | SQA,FTEST | 1976-03-27 | No Check-In Steps Started | ✘ PRE-CHECK-IN NOT STARTED | ✘ E-CHECK-IN NOT STARTED | ✘ Needs Update | |

Figure 22: Completely checked out but never checked in

5.3   Daily Workflow List

The Daily Workflow List Page shows a patient's current workflow status and allows you to track and change the status of the workflow.

5.3.1   Change a Workflow Status

To change a patient's workflow status, from the Workflow Status column, click the drop-down arrow and select the new step. A pop-up page displays asking to confirm the changes. Click Accept and the workflow status will be updated.

Figure 23: Daily Workflow List –Workflow Status "Call"

Figure 24: Confirming a Workflow Status Change to "Needs Clerk"

Figure 25: Daily Workflow List – New Workflow Status "Needs Clerk"

5.3.2 Sorting and Filtering

Appointments can be sorted based on Patient name, Clinic, Appointment Time, Check-In Time, and Workflow Status. Sorting is done by simply clicking the up and down arrows next to the column headers.

Figure 26: Sorting and Filtering a Daily Workflow List

Records can be filtered based on the current workflow status. Click the Workflow Status Filter button, which appears on the right side of Workflow Status column to display the workflow Filter modal window. From the modal window users are able to filter their work list by workflow status through selecting the check boxes next to the workflow statuses.
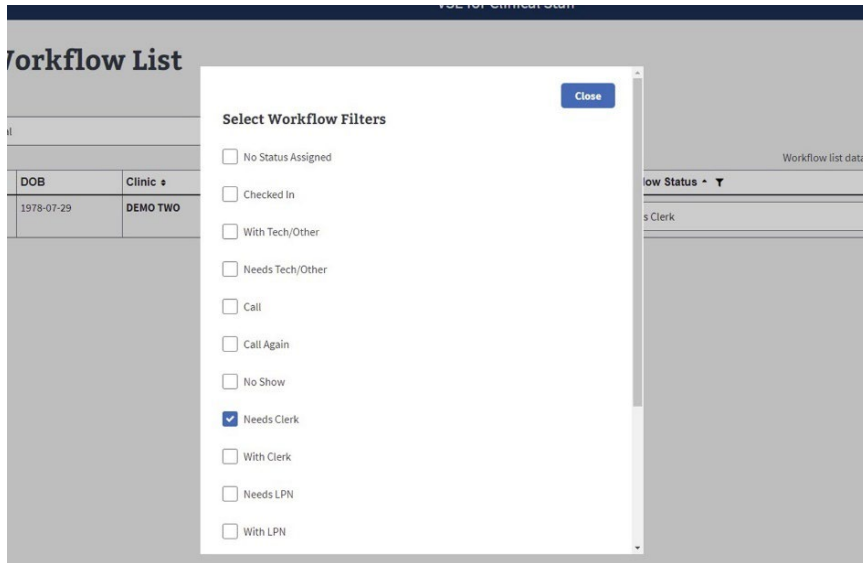
Figure 27: Filter Workflow Status

5.3.3 Alert Notifications

Whenever a change to the Daily Workflow List occurs, an alert notification will be displayed on the taskbar. Even if the VSECS application is in the background, the alert notification still pops-up on the task bar informing the staff of the changes. Changes that trigger an alert include a new appointment in the list or workflow status change.

Figure 28: VSECS Alert Notification

Similarly, if anything changes on the Daily Workflow List the affected row will be highlighted.

Figure 29: DEMO, ONE Patient on the Second Row is Highlighted to Notify the User there was a Recent Change to the Record

5.3.3.1 Disable Notifications for Updated Appointments
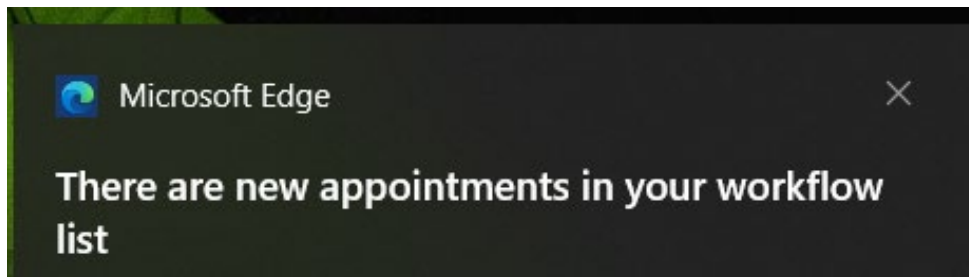
The below toggle has been added to the Help page to let users disable all Windows notifications and alerts for updated appointments.

Figure 30: Disable Window Alert/Notifications

5.3.4 Memo Column

5.3.4.1 Adding a Memo

Users can add a memo to a specific appointment by selecting "Add" under the Memo column for that appointment.
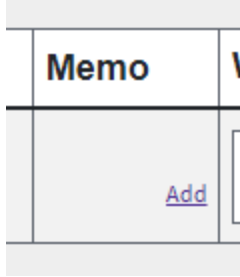
Figure 31: Memo Column

A pop-up will appear for the Memo to be entered. The user can type in a memo and select "Add Memo."

Note: There is a 100-character max for memos.
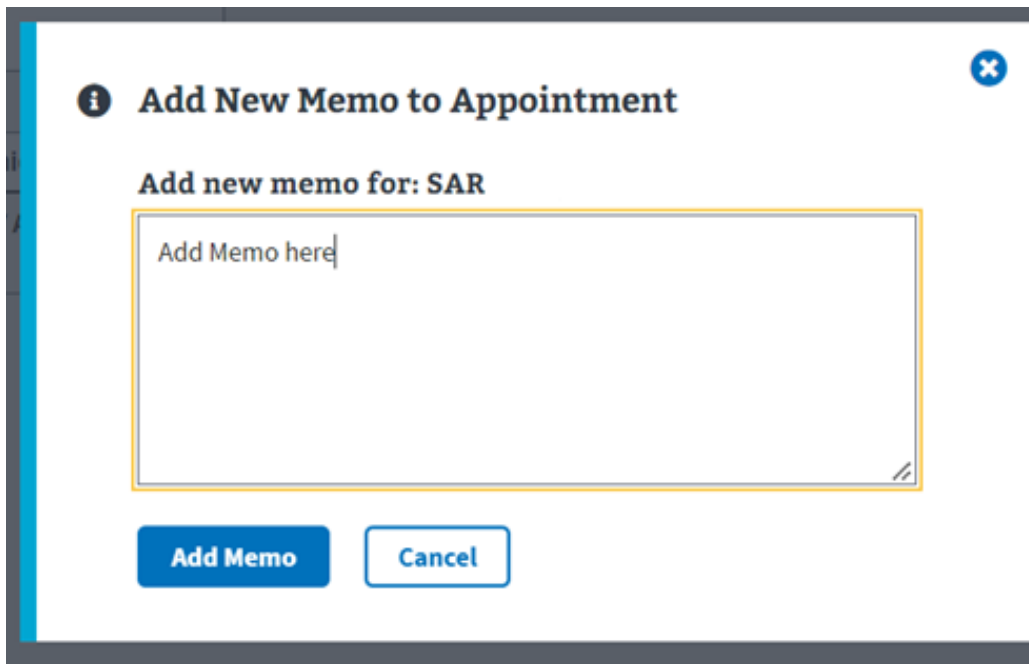
Figure 32: Adding the New Memo to the Appointment

The Memo will show up in the Memo column of the related appointment with a timestamp and the initials of the user that entered the memo.

Figure 33: The New Memo will Show Under the 'Memo" Column

5.3.4.2 Adding Multiple Memos to an Appointment

Multiple memos can be added to the appointment. A user can repeat the process to add an additional memo. When there is more than one memo on an appointment a new option will appear in the column named "More." Only the most recent memo will show on the Daily Workflow list.

Figure 34: Additional Memos Can be Added by Clicking the "Add" Button.

If a user selects more, a pop up will appear to show all of the memos for that appointment.

Figure 35: Click the "More" Button Under the Memo Colum to View all the Memos for the Appointment

5.4   Medications List and Pre-Visit Summary
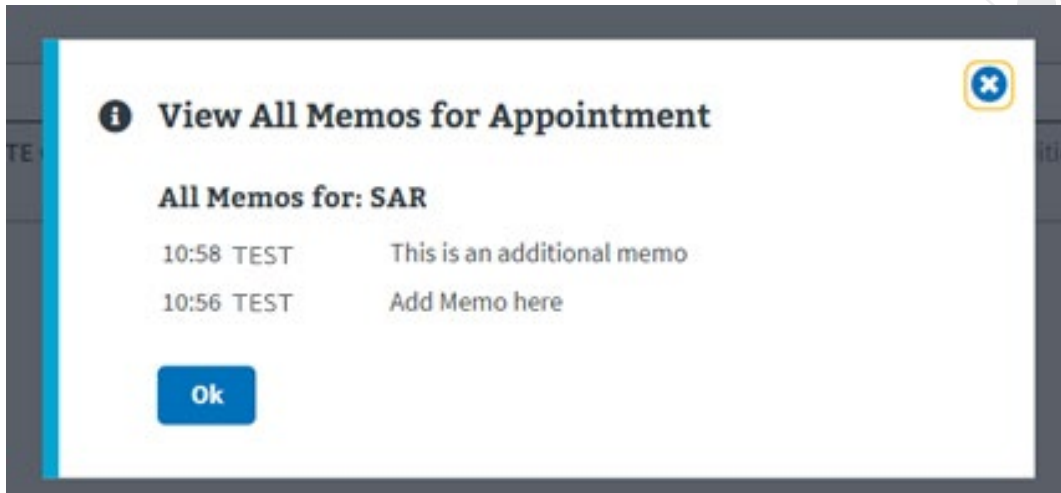
5.4.1   Viewing Medications List

VSECS gives users the ability to view the list of medications associated with the patient. This functionality is available on both the Daily Appointment List and Daily Workflow List.

To view the patient's Medications List:

1. Go to the Daily Appointment List/Daily Workflow List, from the Action column, click on the Medications button displayed on the left side of the Actions column.

Figure 36: Medications Button

2. If the record is sensitive, a Sensitive Record pop-up page displays asking if you want to proceed viewing the Medication List. Click "Yes" to view the Medications List record or click "No" to go back to the Daily Appointment or Workflow List.

Figure 37: Sensitive Record Pop-up Page

3. The Medications List page displays with the list of the patient's medications.

Figure 38: Medication List Page

5.4.2 Printing Pre-Visit Summary

This VSECS functionality allows the staff members the ability to print or save PDF format of the Pre-Visit Summary for a patient to ensure patients are informed before their appointment. This functionality is available on both the Daily Appointment List and Daily Workflow List.

To print/save the patient's Pre-Visit Summary,

1. Go to the Daily Appointment List/Daily Workflow List, from the Action column, click on the Pre-Visit Summary button displayed on the right side of the Actions column.

Figure 39: Pre-Visit Summary Button

2. If the record is sensitive, a Sensitive Pre-Visit Summary Record pop-up page displays asking if you want to proceed viewing the Pre-Visit Summary record. Click "Yes" to view the Pre-Visit Summary record or click "No" to go back to the Daily Appointment or Workflow List.
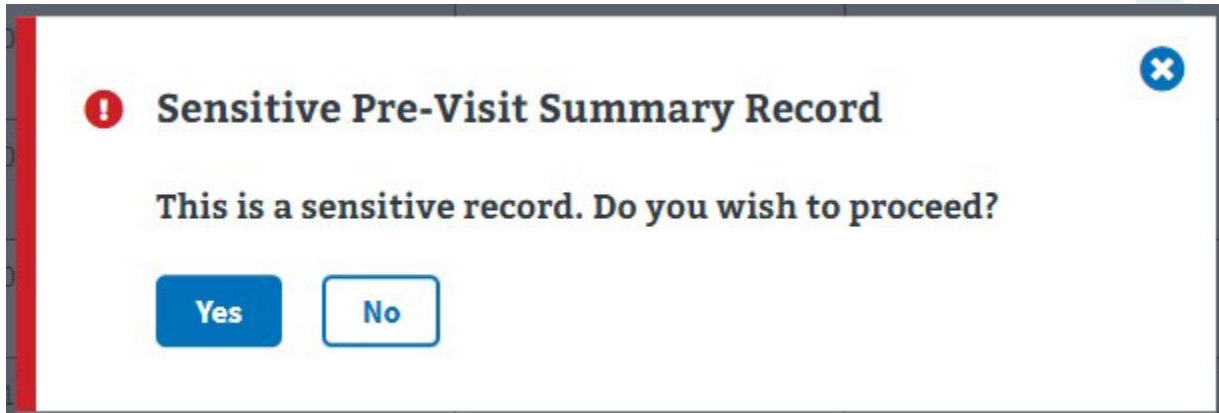
Figure 40: Sensitive Pre-Visit Summary Record Pop-up Page

3. The Pre-Visit Summary Page displays on your default browser in a separate tab in PDF format where it can either be printed or saved.
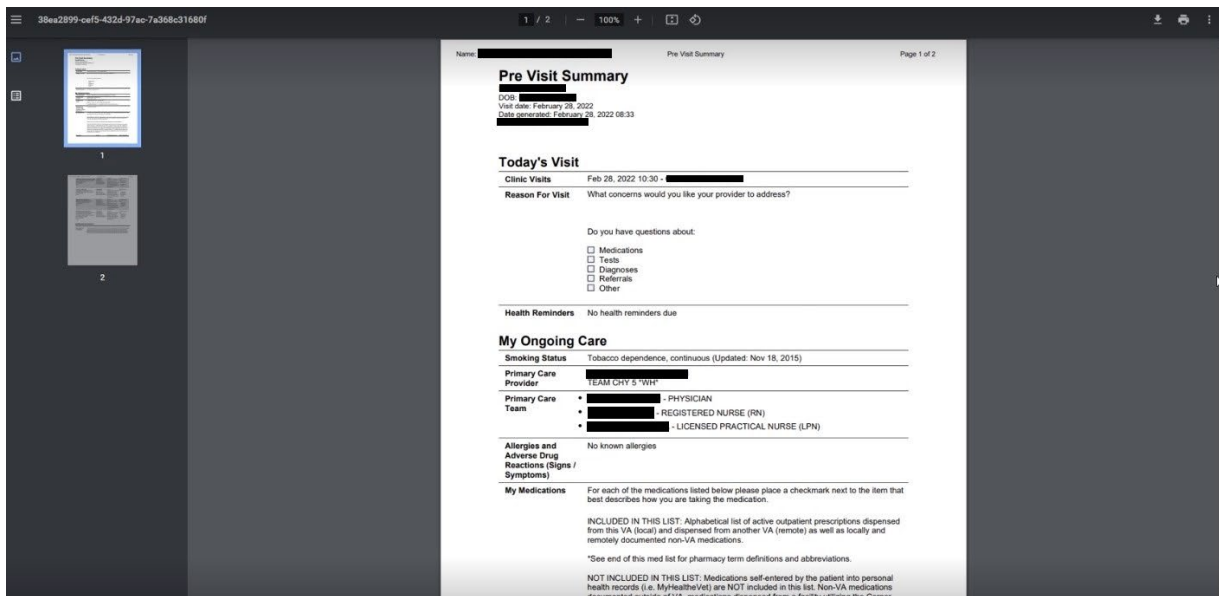
Figure 41: Patient's Pre-Visit Summary

5.5 Fugitive Felon, National/Local, and Restricted Record Flags

Fugitive Felon, Local/National, and Restricted Record Flags will be displayed on Appointments in Daily Appointment List and Daily Workflow List. Hover your mouse over the flag icon below the patient's name to see the type of flag the icon represents or click on an information symbol located on the right-hand side of the Daily Appointment List and Daily Workflow List. When selected, a pop-up appears with legend information regarding the flags as shown below.

Figure 42: Information Icon to Display Flag Legend
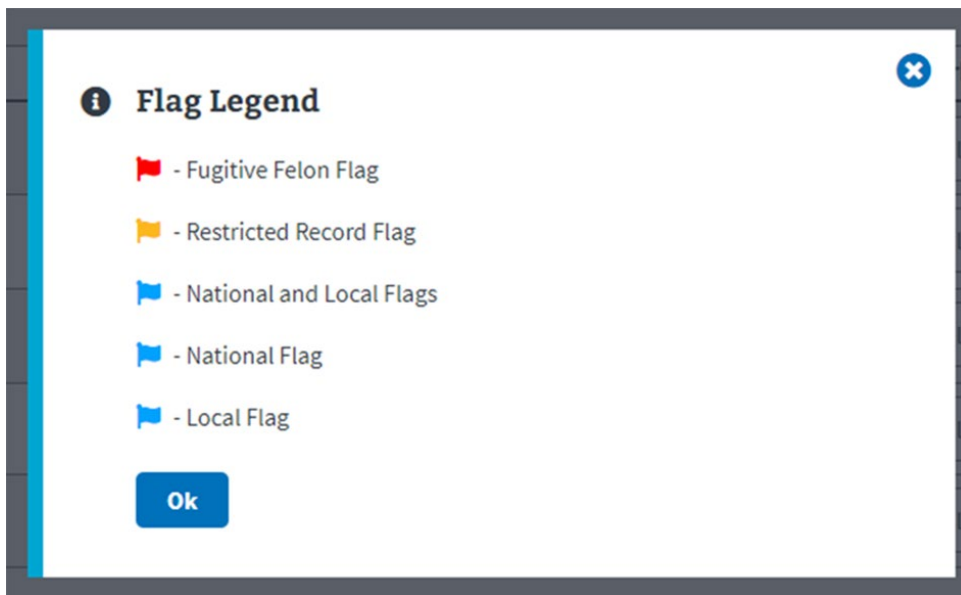
Figure 43: Flag Legend

5.6   Display Number of Checked-In Appointments

The number of Checked-in appointments will now show on the Daily Appointment and Daily Workflow List.

Figure 44: Checked-In Appointments Number Indicator

5.7 Displays Checkout Time and Indicator

The Daily Appointment List and Daily Workflow List show if an appointment has been checked out and the time of check out.

Figure 45: Check-out/Check-In Time and Indicators

6   Troubleshooting/Help Section

For any VSECS-related issues, contact the Enterprise Service Desk (ESD) or create a ticket through ServiceNow (SNOW)/YourIT service portal and assign the ticket to the Scheduling Support assignment group.

6.1   Enhanced Error Messages

The error message logic and verbiage has been updated to provide more information for users on the issue and potential resolution, and to provide a link to a knowledge base article for further troubleshooting steps.

There are four different versions of the error message depending on the error received. The verbiage for each message is consistent with the exception of the service associated to the error, the error itself and the proper group to address in a YourIT ticket.

Below are the four services that can be associated with these errors and an example of the message format:

- VSE-CS
- IAM Service
- PCI/API Service
- Local IT.

Sorry, VSE-CS Ran Into An Error:

Contact:	VSE-CS
Code:	400
URL:	████████████████████████████████████ ███████████████████
Message:	undefined parameter received
Note:	Most common issues can be resolved by reloading the browser/pressing the F5 key
VA Help Desk:	███████████

For troubleshooting steps, please refer to this KBA article

If you continue to experience issues, please submit a Your IT ticket with "ATTN: Scheduling Support" in the summary.
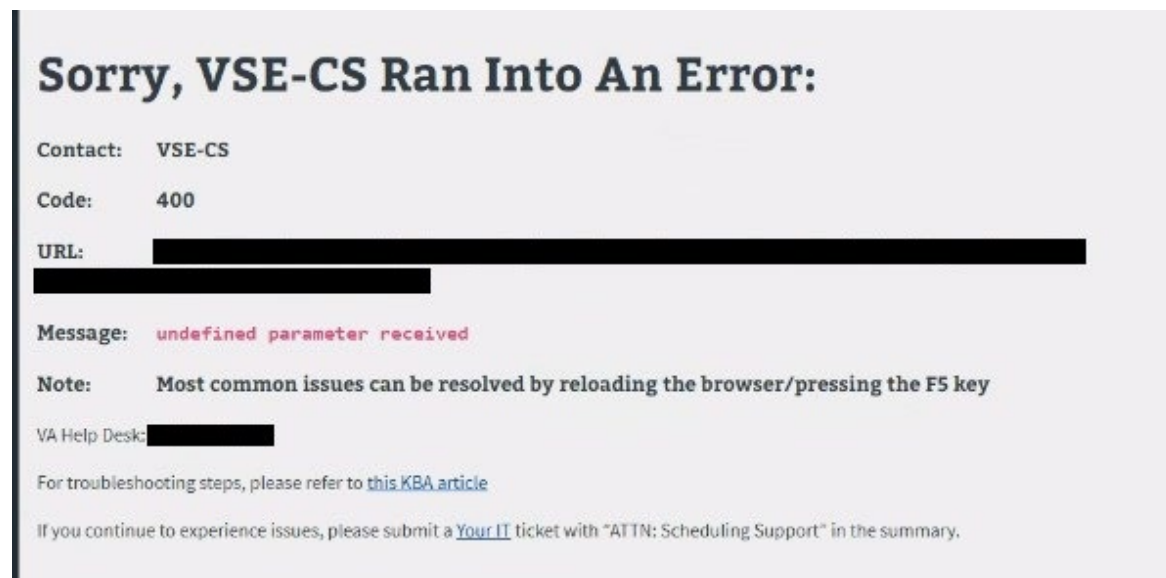
Figure 46: Enhanced Error Message

6.2   Reset Button

The Help page now has a Reset Session button that will remove cached and stored data to help resolve errors.

Figure 47: Reset Session and Reload VSECS

6.3 Pop-up Message to Ensures Users are Running Current Version

As of this release, if a user is not running the most current version of VSE-CS they will see the below notice. After selecting "Ok" the page will be refreshed and updated to the most current version.
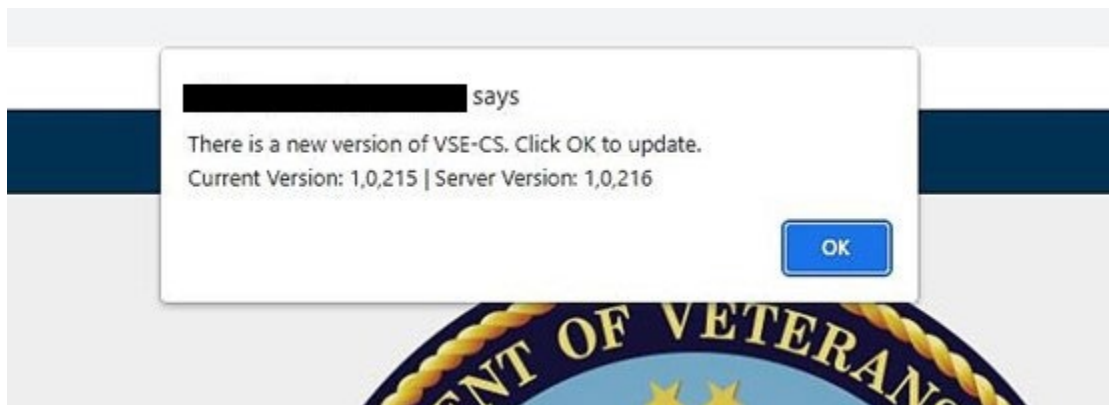

Figure 48: Pop-up Message informing users they're not running the latest version of VSECS.

7 Appendix

7.1 Appendix A - Acronyms and Abbreviations

Term	Description
IAM	Identity and Access Management
PIV	Personal Identity Verification

SSOi	Single Sign-On Internal
VA	Department of Veterans Affairs
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture
VS	VistA Scheduling
VSE	VistA Scheduling Enhancements
VSECS	VistA Scheduling Enhancements for Clinical Staff