VistA Scheduling Enhancements (VSE) Release 1.3.1

Release Notes

June 2017

Version 1.0

Department of Veterans Affairs

Office of Information and Technology (OI&T)

Revision History

Date	Revision	Description	Author
5/30/2017	1.0	Updated to include new release scope	VSE PMO
5/4/2017	1.0	Initial submission	VSE PMO

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1. Introduction

Department of Veterans Affairs (VA) has a need to improve the efficiencies of the outpatient medical scheduling processes through improved visibility of information. Over the next few years, VA will create a comprehensive scheduling solution to modernize Veterans Health Information Systems and Technology Architecture (VistA) scheduling. In order to facilitate transition to the new business processes, VA requires enhancements to the current VistA scheduling system.

1.1 Purpose

The purpose of this document is to provide a summary of the enhancements and defect corrections that make up the VistA Scheduling (VS) Graphical User Interface (GUI) Release 1.3.1 (R1.3.1). VS GUI Release 1.3.1 contains 40 defect fixes and 5 enhancements. More details provided in Section 3.1.

The Release 1.3.1 software package is comprised of the following:

- VS GUI application v2.0.0.12
- VistA Mumps patch SD*5.3*665
- VistA Mumps patch SD*5.3*669

1.2 Audience

This document targets users and administrators of the VistA Scheduling package, version 5.3.

2. This Release

The following sections provide a brief description of the defect corrections implemented by the VistA Scheduling Enhancements (VSE) project.

3. Features and Functionality

 There will be 5 enhancements that will be contained in this release. The enhancements are listed and described below:

- Veteran & Non-Veteran Eligibility - The GUI must prompt for the eligibility associated with the appointment when the veteran has both Veteran and Non-Veteran eligibilities.

- Contact Functionality - The 'Contact' functionality must function according to the documented business needs.

- Tracking of Action - The GUI must show the 'user tracking of action' to identify the scheduler and date scheduled.

- Inpatient 'No-Show' - Inpatient Appointments must not be an automatic 'no-show'.

- Patient-Centered Scheduling - 'Recall' must be renamed 'Patient-Centered Scheduling' in the VS GUI application.

3.1 Defects Corrected:

Note: The defect corrections included in this release are complete and do not require any workarounds to be effective.

Ticket Number	Defect Description	Patch Number(s)
I11259063FY17	Electronic Wait List (EWL) that is Dispositioned from within the Request Management (RM) Grid does not get removed from the RM Grid.	SD*5.3*665
I11278566FY17	User is able to select Service Connected for a Non-Service Connected patient when transferring an Appointment Request to EWL.	SD*5.3*665
I12381309FY17	he Service Connected (SC) related check box in Appointment (APPT) REQUEST/EWL is not in sync with the Appointment Type	SD*5.3*665
I10731487FY16	Remove Hovering and Make Consistent with Clinic Schedule.	SD*5.3*665
I10115520FY16	The Multiple Appointments Required Box is Available for Selection when Transferring an Appointment Request to an Electronic Wait List Request.	SD*5.3*665
I10632644FY16	When a user looks at a Clinic Group, the horizontal lines don't line up across schedules in the calendar.	SD*5.3*665
I10658980FY16	A Blank Line is displayed after the removal of an appointment request from the Resource Management Grid.	SD*5.3*665
I11072424FY17	VistA Scheduling (VS) GUI does not display cancel time correctly in the calendar when a partial day clinic cancellation is done.	SD*5.3*665
I11476925FY17	There is no way to decline access to a sensitive patient after it has been selected.	SD*5.3*665
I12166209FY17	When selecting a request from the Resource Management (RM) Grid that has a PAST CID/PD date, the calendar grid opens to TODAY but the calendar on the left side opens to the past CID/Date.	SD*5.3*665
I12166991FY17	User can change temporary address start date but the first entered date is captured.	SD*5.3*665
I12168045FY17	Clinic Group does not display providers in the group.	SD*5.3*665
I12179702FY17	VS GUI is not notifying VistA when a user accesses a sensitive record.	SD*5.3*665
I12183008FY17	Sensitive Patient Information is not displaying after the Security Agreement has been accepted.	SD*5.3*665
I12438637FY17	Audit Report not allowing manager to change user selection.	SD*5.3*665
I12487253FY17	Hovering over an appointment in the calendar does NOT display detailed patient information.	SD*5.3*665
I12487403FY17	The drag and drop appointment capability is not available.	SD*5.3*665
I12487482FY17	Unable to remove Special Needs and Preferences remarks.	SD*5.3*665
I12514894FY17	Unable to print No-Show, Cancel by Patient, Cancel by Clinic letters.	SD*5.3*665

Ticket Number	Defect Description	Patch Number(s)
I12519207FY17	The Patient's Date of Birth (DOB) is sometimes hidden in the ribbon bar.	SD*5.3*665
I12520061FY17	Appointment Length Displayed in the New Appointment Block does NOT match VL clinic set appointment length.	SD*5.3*665
I12521476FY17	Received unhandled exception after clicking search for patient.	SD*5.3*665
I12521882FY17	Provider or Patient No Longer Coming Up when I tab to Requested By box and type PR or PA.	SD*5.3*665
I12522168FY17	Unable to enter "x" in work phone number to define extension.	SD*5.3*665
I12522371FY17	Heavy grid lines in clinic schedule for areas no longer defined with availability.	SD*5.3*665
I12523876FY17	Appointment Request Comments are not updated in the Resource Management (RM) Grid after they are revised.	SD*5.3*665
I12524388FY17	Provider Names Not Being Displayed.	SD*5.3*665
I12524663FY17	User is not seeing any or all clinics when using the clinic abbreviation.	SD*5.3*665
I12525300FY17	Appointment Block for unscheduled appointments is NOT displaying the time selected in the Calendar Grid.	SD*5.3*665
I12542160FY17	Clinic Drop Down Box isn't dropping when I create a new Recall Request.	SD*5.3*665
I12558918FY17	MRTC Find Appointment Dialog will NOT automatically display.	SD*5.3*665
I12563921FY17	Correct Duration is not in the Dropdown Box.	SD*5.3*665
I12568776FY17	Clinic Schedule will not automatically display for regular single requests.	SD*5.3*665
I12625138FY17	User Preference filter using too many clinics causing VS GUI to hang (also see CA Ticket # I12657907FY17).	SD*5.3*665
I12657907FY17	(Duplicate of I12625138FY17) After filtering to SC visits in User Preferences, only the loading patient request	SD*5.3*665
I12657968FY17	When Cancel Availability for Two Separate Days, Same Clinic, and Only 1 Request Displays on Report.	SD*5.3*665
I12878525FY17	Query Tool with Criteria of EWL and Podiatry Service Produces Black Screen.	SD*5.3*665
I12878778FY17	SVS GUI Audit Activity Report Showing Activity for Users Not Logged Into System.	SD*5.3*665
I9642568FY16	When searching for a provider clinic a "Loading Screen" displays but does not go away when the search results are presented.	SD*5.3*665
I9790797FY16	Comment symbol is displayed in a column that is not supposed to have a symbol.	SD*5.3*665

4. User Documentation

Documentation distributed with this project includes the following and may be retrieved from the VistA Documentation Library (VDL) on the intranet at the following link: Scheduling.

File Names	Description
VS_GUI_UG_R1.3.PDF	VS GUI User Guide
GUI_TM_1.3.PDF	VS GUI Technical Manual
VSE_IG_1_3_1.PDF	VS GUI Installation Guide

File Names	Description
VSE_R_Notes_1_3_1.PDF	VSE Release 1.3.1 Release Notes

5. Known Issues

All known issues for this release are documented using the CA SDM tool. Tickets generated and that remain open will be addressed as part of the ongoing Post Warranty Sustainment effort. Known issues are documented as Open items on the latest ticket list here.

6. Testing Details

The 1.3.1 release test cycle was an expedited testing cycle. While it included a Software Quality Assurance (SQA), Initial Operating Capabilities (IOC) pre-production and IOC production testing phases the time periods for each phase were shortened. There were 5 IOC sites utilized for this IOC testing cycle. Only 1 site completed all required scripts. Only one site concurred with moving forward with the national release of the functionality and defect fixes contained in this release.

On the VSE project, defects are managed differently per testing cycle phase. During the SQA and IOC pre-production phase, the issues that are found are manually managed in the projects defect log. During the IOC production phase the issues are captured and once adjudicated by the Office of Veterans Access to Care (OVAC) team they are placed into CA SDM database.

Below are the defect results of each testing phase for the 1.3.1 release.

SQA Phase Results
There were 20 unresolved defects identified during the SQA testing phase: 2 with a high severity, 17 with a medium severity, 1 with a low severity.


1.3.1 SQA Defects By Severity
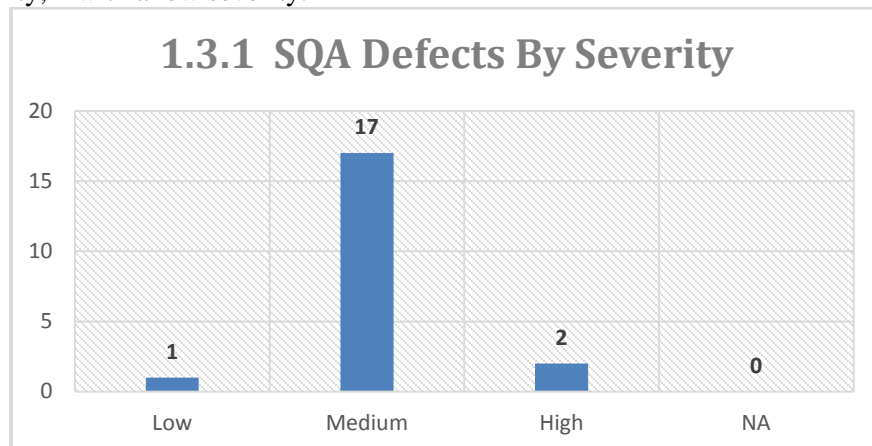
Below is the list of the 20 unresolved defects from the SQA test phase:

Defect Work Item #	Description
VSE1.3.1-SQA-09	GUI is looking at the Recall file and not validating that the clinic is active or not
VSE1.3.1-SQA-10	Schedule is kept open. The schedule is kept open and the user can process the appointments that appear in the schedule.
VSE1.3.1-SQA-11	Need more info in VistA 409.86. When looking at 409.86 in VistA the following needs to be added
VSE1.3.1-SQA-12	Hard to find right record in VistA when patient has multiple recalls for the same clinic. When looking at the new VistA file 409.86 it is hard to tell what record you want if the patient has multiple recall requests.
VSE1.3.1-SQA-13	Provider and clinic field required on PtCSch request creation but not marked as such
VSE1.3.1-SQA-16	Creation of EWL requests are not added to Audit Report. The Audit Report is not being updated when an EWL request is created.
VSE1.3.1-SQA-17	Patient Contacts are not being added to the Audit Activity Report After adding a contact attempt the Audit Report isn't updated
VSE1.3.1-SQA-18	APPT Entries not updated on Audit Activity. After adding APPT requests the request creation is not added to the Audit Activity.
VSE1.3.1-SQA-19	When using Cancel on Clinic Group dialog box the changes made to the data are saved. When using Cancel on Clinic Group the changes made to the screen are saved.
VSE1.3.1-SQA-20	Can't see all clinics in Provider Schedule
VSE1.3.1-SQA-21	When opening and then closing Scheduling Management without any changes informational message appears
VSE1.3.1-SQA-22	Receive informational message while creating Clinic Group when there should be no message
VSE1.3.1-SQA-23	moving Appt req to EWL req lose contact attempts
VSE1.3.1-SQA-24	Can't see all clinics in Provider Schedule
VSE1.3.1-SQA-25	Clinic Schedule area should be blank when calendar grid is blank
VSE1.3.1-SQA-26	Flyover text says 1 thru 3 of 3 but only 1 line appears
VSE1.3.1-SQA-27	Mouse icon not changing when making columns larger. When changing the size of the grid the mouse icon should be changed to an arrow pointing left double vertical lines and an arrow pointing right (similar to this <-||->) or a double arrow (similar to this <->) when it hits the spot on the screen has the mouse touch it.

Defect Work Item #	Description
VSE1.3.1-SQA-28	Mouse icon not changing when changing size of grid. When changing the size of the grid the mouse icon should be changed to an arrow pointing up double vertical lines and an arrow pointing down (similar to this except arrows pointing up and down not left and right<-‖->) when it hits the spot on the screen has the mouse touch it.
VSE1.31-SQA-04	Records being duplicated on GUI screen The record on the screen keeps duplicating itself when returning to the screen
VSE1.31-SQA-05	Right mouse click items appear active when nothing is available

IOC Pre-Production Phase Results

There were 34 unresolved defects identified during the IOC pre-production testing phase: 2 with a high severity, 1 low with a high severity and 31 which were not adjudicated (NA).
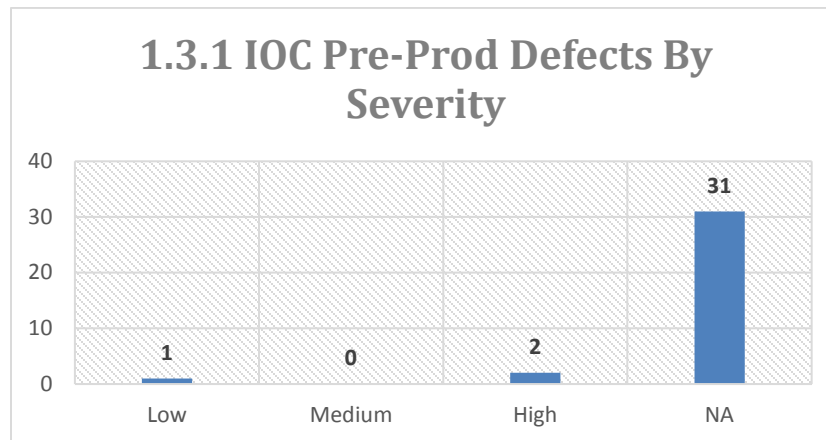
Below is the list of the 34 unresolved defects from the IOC pre-production testing phase:

Defect Work Item #	Description
VSE.1.2.-IOC-1.1-1	Extra hyphenated boxes in EWL request pop up
VSE.1.2-IOC-1.1-2	Unhandled Exception - I hit OK after transferring to EWL, and received an unhandled exception. I was trying to get screenshots for my previous email, so this may be due to the extra clicking around I was doing.
VSE.1.2-IOC-1.1-3	Test fail v1.2 test 1.1: Would not let me click the multiple appointment box after transferring to EWL.

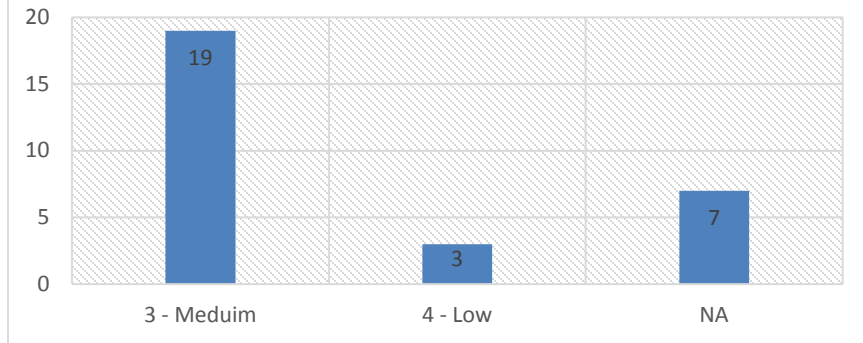| Defect Work Item #	Description
VSE.1.2-IOC-1.1-4	Extra hyphenated boxes in EWL: I didn't think about it before, but when I have one of these random areas highlighted, I can keep tabbing to other active and non-active areas on the GUI screen. This is going to be a problem for our JAWS and other hotkey users, since they'll get a bunch of garbage areas between the normal buttons and fields they'd tab to. Something to think about for 508 compliance. I don't have an active JAWs scheduler at the moment, so I don't know what the non-active areas are sending to the audio feed as descriptions.
VSE.1.2-IOC-16.1	Drag and Drop-Consult Appt. Cleveland confirms consult AND recalls give unhandled exceptions when you try to drag and drop appts made from these two types of requests.
VSE.1.2-IOC-16.2	Received unhandled exception when trying to move consult – appointment is canceled & back on grid. Unhandled Exception does not occur with appointments not associated with consult.
VSE.1.2-IOC-18.1	Server printer option is grayed out and unavailable for selection
VSE.1.2-IOC-21.1	Edit Appointment Length: It seems that the fix in Release 1.2 Patch SD 665 not only fixed the below problem with matching Variable length appointment but removed the availability to CHANGE/EDIT the appointment length in EDIT Appointment
VSE.1.2-IOC-27	Load Requests Issue: (User Preference) When pulling up VS GUI no requests show in the request box. No preferences are checked.
VSE.1.2-IOC-32.1	After saving my user preferences, I closed VS GUI and logged back in and received this error message: I selected 'OK' and it cleared the user preferences I had saved previously on the request grid. I pulled up the user preferences again and it still shows it's filtered according to the test case. I removed those user preferences and clicked save as default and okay. Now every time I log in, I receive the Build User Preferences dialog box.
VSE.1.2-IOC-33.1	User preference selected entered /RR No Date >=1/1/17 – returned results for prior years, going back to 2014.
VSE.1.2-IOC-33.1	SC Visits in user preferences Requests did not load
VSE.1.2-IOC-7.1	Would not open the clinic grid when I clicked on an older consult.
VSE.1.2-IOC-NA-1	This is just something I've noticed that is different in v2.0.0.9. When you log in to VS GUI the clinic schedules, provider schedules and clinic groups is no longer stacked. They are partially hidden and I have to pull them up every time I log in. I'm not sure why this changed, but if it must be like this, can it be set somewhere similar to the user preferences that will lock in the view and stay even after logging off?
VSE.1.2-IOC-NA-2	Can't print ANYTHING through ANY of GUI's print methods
VSE.1.2-IOC-NA-3	Application goes dim for a second after creating appt request and searching clinic group - others too
VSE.1.2-IOC-NA-4	Query results list goes away as soon as you try to work an item

Defect Work Item #	Description
VSE.1.2-IOC-NA-5	Lose the query and RM grid results list after you click on an item. Need to re-search after each patient. Before, you could keep your worklist entact as you work the items on the list.
VSE.1.2-IOC-NA-6	CID/PREFERRED DATE FIELD BLANK: When I selected cancel by patient, I went to the little calendar to change the CID. Because this was a super old appointment request, it was back to May 2016 so instead of clicking the arrow forward 12 times, I tried typing in the date. Well It didn't like the format I put the date in and it gave me the little error box below. It did NOT show the red "valid date format: m/d/yyyy" box when I was typing. That just appeared in my screen shot.
VSE.1.2-IOC-NA-7	As I was tinkering with the VSE 2.0.0.10 Test GUI – I tried to search using the Provider Schedule option I got this unhandled exception error. I have attached the VSETrace Log for your reading pleasure.
VSE.1.2-IOC-NA-8	I've been working on scripts today and although it wasn't part of the script I realized that the grid allows you to move an appt to a time where and/or day where no grid is available. See below. In Vista, this clinic grid doesn't start until 8AM but it allowed me to schedule at 7. It also allowed me to schedule on a day where no grid exists in Vista.
VSE1.3.1-IOC-02	I added contact attempts to an appointment request and was going to schedule the appointment so I could then cancel the appointment and verify that I can distinguish contact attempts for a previous and current appointment request, as per the test case.

When I started to make the appointment I noticed some odd. The appointment conflicts shows an Audiology appointment that was previously cancelled by patient. It also show the time duration as 20 minutes, which is incorrect. The audiology appointment was scheduled for 60 minutes. |
VSE1.3.1-IOC-03	After I made that podiatry appointment (in my previous email), I cancelled it so I could test case 41.3 and viewing contact attempts for the current request and the previous request. Contact attempts for the previous request did not display in the Contact Attempts grid with False in the 'current' column.
VSE1.3.1-IOC-14	The apt request was not available, until I tried to clear the patient's name. Also, it was spinning for about a minute before I could start working again
VSE1.3.1-IOC-15	Description states an alert will open when attempting to disposition Appt, ewl or recall for a MH pt. No alert/box opened. Was able to remove.
VSE1.3.1-IOC-25	Enter the active Provider with an inactive Clinic. Validate that the following message displays "There are no Clinics associated with <name of the provider>" Validate that the user is able to select another Provider. (Confirm there is no spinning). Message does not display, user can select another provider.
VSE1.3.1-IOC-28	The user preferences are not aligned the way that I have set them as my default

Defect Work Item #	Description
VSE1.3.1-IOC-29	Received the following error when transferring to EWL. .Availability Initialization Dialog – Unable to initialize Availability for CLE NEPH KNAUSS, unknown View
VSE1.3.1-IOC-30	Contacts allow future date of entry. Can put in a future date for contact. Date of entry is correct, so audit chain is still intact
VSE1.3.1-IOC-31	Dispositioning after call attempts. This is not in accordance with..." error when doing 42.1 for each type, but I'm not sure if it's something I'm doing or an actual fail. I was backdating.
VSE1.3.1-IOC-32	When cancelling the appointment by clinic the CID defaults in that field to the appointment date. Following through with the cancellation, the CID goes back to the original? I also noticed when I viewed the appointment, it doesn't show anything under Benefit/Eligibility and it allows me to select the arrow for a drop down but does not populate result. I thought when Viewing an appointment, you weren't able to do anything to any of these fields? Also, the comments display on the consult in CPRS are displaying out of order. Kim Puckett found the ticket number: I11338083FY17
VSE1.3.1-IOC-36	The required number of Patient Contacts has Not been completed for this request. Are you sure you want to remove this request? Added 1 call 5/1/17 and 1 letter 5/29/17. When third contact call 6/15/17 is added no warning comes up. Adding 4th contact – then you can disposition with the warning.
VSE1.3.1-IOC-37	Appt, Recall & EWL "The required number of Patient Contacts has Not been completed for this request. Are you sure you want to remove this request? Added 1 call 5/1/17 and 1 letter 5/29/17. When third contact call 6/15/17 was added the warning does not come up. Added third contact, now you can disposition request.
VSE1.3.1-IOC-40	I was working on 50.3 viewing a PtCSch request and I swear I come across the weirdest things just one time. Here is the PtCSch request in the request grid: Note the clinic name: When I view the request, the clinic name disappears? If I go to edit the request, a drop down with similar names appears: I tried it on other patients and with other clinics and I can't reproduce it. Why just this one?!?

IOC Production Phase Results

There were 29 unresolved defects identified during the IOC production testing phase: 19 with a medium severity, 3 a low severity and 7 which were not adjudicated (NA).

1.3.1 IOC Production Defects

Below is the list of the 29 unresolved defects from the IOC production testing phase:

Defect Work Item #	Description
VSE1.3.1-PROD-08	Made appt, tried to print, and system hung and appt NOT created
VSE1.3.1-PROD-9	CLINIC GROUPS ISSUE: I had CHI MH PHYSICIAN I clinic pulled up in my calendar view. I think went to clinic groups and attempted to select the clinic group and it would not populate the schedules in the clinic group to the calendar view. I had to select a new clinic group from the clinic groups drop down, wait for it to load then re-search and select the MH Physician group.
VSE1.3.1-PROD-10	Eligibility not showing in view appt or expanded entry PHI!!!
VSE1.3.1-PROD-11	Problem with Duration of appointment
VSE1.3.1-PROD-12	Minor issue, the close button at the bottom of expand entry is really big and using up valuable real estate
VSE1.3.1-PROD-13	View APPT - Select OK instead of Cancel: When viewing an appointment where the benefit/ eligibility drop down is blank, if you select OK rather than Cancel or the red x in the top right, it displays the below prompt:
VSE1.3.1-PROD-14	Contact Attempts Has Not Been Completed - Clinic with Stop Code 454
VSE1.3.1-PROD-15	PtCSCh Request Clinic is Blank: When viewing PTCSch request the clinic shows on the RM grid, if you select view the clinic is blank. When editing the PtCSch request clinic is blank but has two in the drop down. PtCSch Disposition Edit Request
VSE1.3.1-PROD-16	Contact Attempts-PtCSch: I received the Patient Contacts dialog box when attempting to disposition a recall that I added three attempts (2 calls and 1 letter) to: Clinic stop code information below

Defect Work Item #	Description
VSE1.3.1-PROD-17	New Error Message: I just transferred an appointment request for VSE TEST CLINIC to the EWL for a patient. I clicked refresh to completely refresh the GUI and received the below error message: Availability Initialization – Unable to initialize Availability for CHI PACT PHYSICIAN RED, unknown view mode
VSE1.3.1-PROD-18	Unhandled Exception: Received Unhandled Exception when trying to pull query. An Unhandled Exception occurred and the application is terminating. For more information see your application log.
VSE1.3.1-PROD-19	GUI time out box only flashed for a half second, not like in TEST where you have time to say don't close
VSE1.3.1-PROD-20	Unhandled Exception Error I was working on test case 43 and went to cancel the appointment I just made. Right clicked the appointment in the calendar and selected cancel appointment and received an unhandled exception error. This is the second time today I've received an unhandled exception error which is concerning to me.
VSE1.3.1-PROD-21	Could not make the appointment when the patient does not have an eligibility in GUI, but can in VISTA
VSE1.3.1-PROD-22	Audit Report: Once you select the scheduler the "loading data starts" does not allow you to select the time frame. Every type of request has been completed today, the report only reflects appointments cancelled.
VSE1.3.1-PROD-23	Just annoying - Appt request box display default dimensions hide comments box
VSE1.3.1-PROD-24	Make a recall box now says Appt Request at the top: Make a recall box now says Make Appt Request at the top instead of PtCSch.
VSE1.3.1-PROD-26	Received error when creating a PtCSch request: When I just tried to create a PtCSch request, it got the following error: An unhandled exception occurred and the application is terminating. For more information see your Application log.
VSE1.3.1-PROD-27	SPINNING: I was running test case 50.6 and attempting to load audit activity and it just spins.
VSE1.3.1-PROD-28	Availability Initialization Error & Unhandled Exception: When switching from appointment request CPH Podiatry to appointment request Test clinic, received availability initialization error then unhandled exceptions. *Availability Initialization – Unable to initialize Availability for CPH PODIATRY1, unknown view mode *An unhandled exception occurred and the application is terminating. For more information see your Application log.
VSE1.3.1-PROD-30	Query did not pull in EWL request: Pulled a query for EWL all wait times – results comes back with no records match, pulled VistA report that shows one. In pulling up the patient in VSE you can see the request on the RM grid.

Defect Work Item #	Description
VSE1.3.1-PROD-31	41.3 & 41.4 The contact attempts made for the previous request (APPT, EWL, Consult, Recall) are displayed in the Contact Attempts grid and False is displayed in the Current column Fail – Consult -Made contact attempts then scheduled appointment, when appointment was canceled previous attempts are true (green).
VSE1.3.1-PROD-32	Regression Testing Case 2.2: I search Dr. John Welch in the provider schedules and it's displaying a clinic that he is not the primary provider for (CHI CAM CHIRO F): Dr. Welch might be a secondary provider on the clinic. I just wasn't sure how this was supposed to work – Do all clinic (whether primary or secondary provider) show when viewing provider schedule?
VSE1.3.1-PROD-33	Regression Testing: Maybe it's just me (and it's early and the weekend), but the appointments that are no-shows (in red) are extremely hard to read. I assume these are still required to be 508 complaint (which I know nothing about), but I don't think this will pass. Is this already on the list?
VSE1.3.1-PROD-34	Regression Test - Case 13.4: NSC Veteran. Cannot check the Svc connected box, but you can still change the appointment type to service connected in the drop down box:
VSE1.3.1-PROD-35	user CANNOT log back into GUI after attempting case 33.1 on any PC
VSE1.3.1-PROD-37	Testing No-show in v2.0.0.12 Issue: 2 prompts are displaying for printing no-show letters. The first (pink) No-Show block tells the user to click a MISSING button (this PINK block probably needs to be removed??)

NOTE: Each of the production defects above will be placed into CA SDM