

Scheduling Manager (v 1.1.1) User Guide



VA

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Content

Content	2
Table of Figures	3
General Information	4
Application Overview	4
Organization of User Guide	4
Application Summary	4
Configuration	4
User Access Levels	4
Getting Started	5
Accessing the Launchpad and Scheduling Manager	5
Components of the Launchpad	5
Starting Scheduling Manager	5
Using Scheduling Manager	6
Scheduling Manager Warning Dialog	7
Scheduling Manager Home Page	8
Booking an Appointment	9
Searching for a Patient	9
Searching for a clinic	12
Choosing a Desired Date	12
Viewing appointment availability	13
Book Appointment Dialog	16
Patient-Centric View	17
Future Appointments	18
Cancel Appointment	18
Veteran Requests Page	20
Processing an Appointment Request	21
Cancel Request	22
Unavailable	23
Booking an Appointment Request	24

Table of Figures

Figure 1 Launchpad	5
Figure 2 Login Screen	6
Figure 3 Warning Dialog.....	7
Figure 4 Home Page	8
Figure 5 Booking Page.....	9
Figure 6 Patient Search Dialog	10
Figure 7 Patient Search Demographic Popup	11
Figure 8 Header with Patient in Context	11
Figure 9 Patient Contact Details Popup	11
Figure 10 Searching for a Clinic.....	12
Figure 11 Desired Date of Appointment field and button.....	12
Figure 12 Desired Date Popup	12
Figure 13 Calendar Month View	13
Figure 14 Calendar Week View	14
Figure 15 Calendar Day View	15
Figure 16 Book Appointment Dialog.....	16
Figure 17 Successful Booking Dialog.....	17
Figure 18 Patient-Centric View	18
Figure 19 Cancel Appointment Dialog	19
Figure 20 Cancel Appointment Success Dialog.....	20
Figure 21 Veteran Requests Page	20
Figure 22 Veteran Request Details on the Booking Page	21
Figure 23 More of the Veteran Request Details Collapsible	22
Figure 24 Cancel Request Popup	23
Figure 25 Cancel Veteran Request Success Message	23
Figure 26 Unavailable Appointment Popup.....	24
Figure 27 Unavailable Appointment Success Message	25
Figure 28 Book Appointment Dialog with Veteran Request	25

General Information

This document is the user guide for the Scheduling Manager application, which provides VA scheduling clerks, and staffs the ability to manage Veterans' appointment requests.

Application Overview

Scheduling Manager provides a clerk with the ability to schedule and cancel patient appointments. The Scheduling Manager works in conjunction with The Veteran Appointment Request (VAR) application so that a scheduling clerk and a Veteran can have a secure message dialog to request an appointment. The Clerk can book an appointment based on the request

Organization of User Guide

The User Guide describes the key features and functionality of the Scheduling Manager Application.

The User Guide consists of four sections:

General Information - Section explains in general terms the application and the purpose for which it is intended.

Application Summary - Section provides a general overview of the application. The summary outlines the hardware and software requirements, the configuration, user access levels and workflow.

Getting Started - Section explains how to launch Scheduling Manager from the Launchpad and log on.

Using the Application - Section provides a detailed description of functionality.

Application Summary

This section provides a general overview of platform requirements for using Scheduling Manager.

Configuration

Scheduling Manager is a web based application. The target platform for Scheduling Manager to run on is a VA provided desktop device running MS Windows with Internet Explorer. Scheduling Manager can be run on VA provided tablets. It is not recommended that Scheduling Manager be run on a mobile device with a small screen such as a phone.

User Access Levels

Only users with a valid VA DS Logon can use this application. The user's Vista credentials will determine which facilities and clinics the individual will be able to access and manage. The ability to overbook or book into restricted clinics will be governed through the use of security keys assigned to the credential.

Getting Started

This Section describes the Launchpad and logging into Scheduling Manager.

Accessing the Launchpad and Scheduling Manager

Scheduling Manager is a web-based application so there must be connectivity to the internet to access it. Scheduling Manager is one component in a suite of applications provided to the VA. This suite of applications is presented on the Launchpad.

Components of the Launchpad

Each application has an icon. The arrangement of the icons varies depending on the size of the browser window and the physical screen size. The individual user's VA credentials will determine which apps can be accessed and the functionality available in each app.

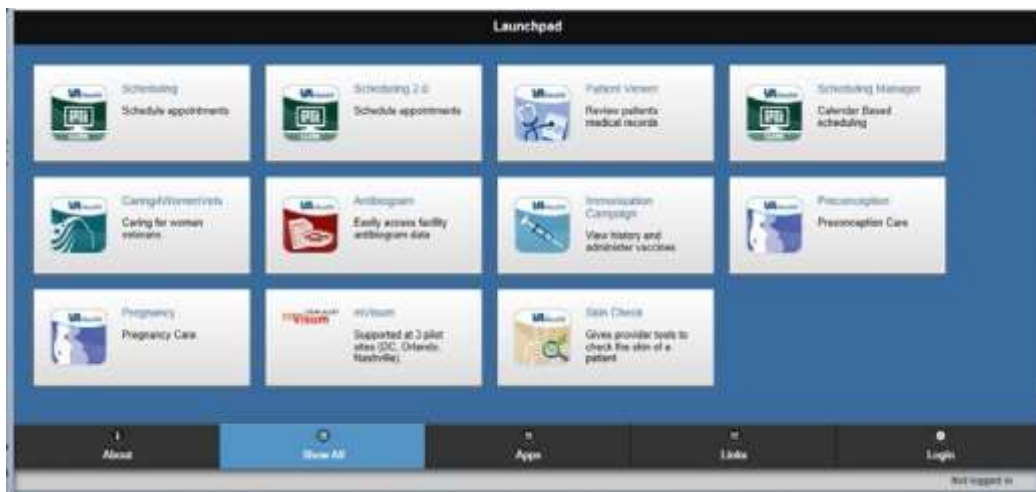


Figure 1 Launchpad

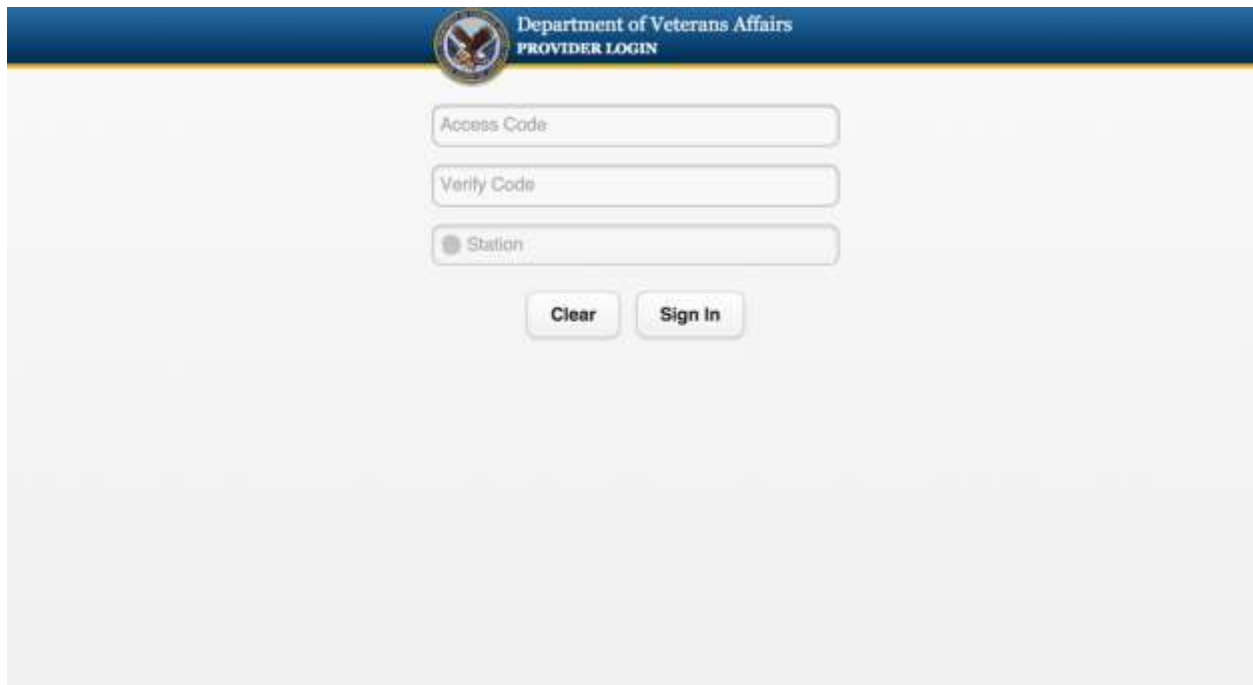
There are a several buttons at the bottom of the Launchpad. The About button displays brief information about the Launchpad. Show All refreshes the display of icons. Apps and Links provides access to other VA applications. Login requests the user's ID, password and facility the user will access.

The bottom bar of the Launch pad displays the version of the Launchpad. The status of the user is also shown. If a user is logged in their user name and the facility they are accessing will be displayed.

The Launchpad can be accessed at <https://staff.mobilehealth.va.gov/launchpad>. Note that the application may not be on the Launchpad for initial release. If it is not available on the launchpad, access the app directly at <https://staff.mobilehealth.va.gov/scheduling-manager>.

Starting Scheduling Manager

Select the icon labeled "Scheduling Manager – Calendar Based Scheduling". Again, if the icon is not available on the Launchpad, access the app directly at <https://staff.mobilehealth.va.gov/scheduling-manager>. If the user is not logged in, the login screen will be displayed.



Department of Veterans Affairs
PROVIDER LOGIN

Access Code

Verify Code

Station

Clear Sign In

Figure 2 Login Screen

Logging in requires the user to enter their VistA access and verify codes, and the VA medical facility they are authorized to access.

Using Scheduling Manager

In general, the Scheduling Manager screen is divided into two parts. The left pane is used to select what the Clerk will work on. This can be a clinic in the facility, an appointment request or a specific Veteran. The right side of the screen will display details about what was chosen and present actions the Clerk can take.

Scheduling Manager Warning Dialog

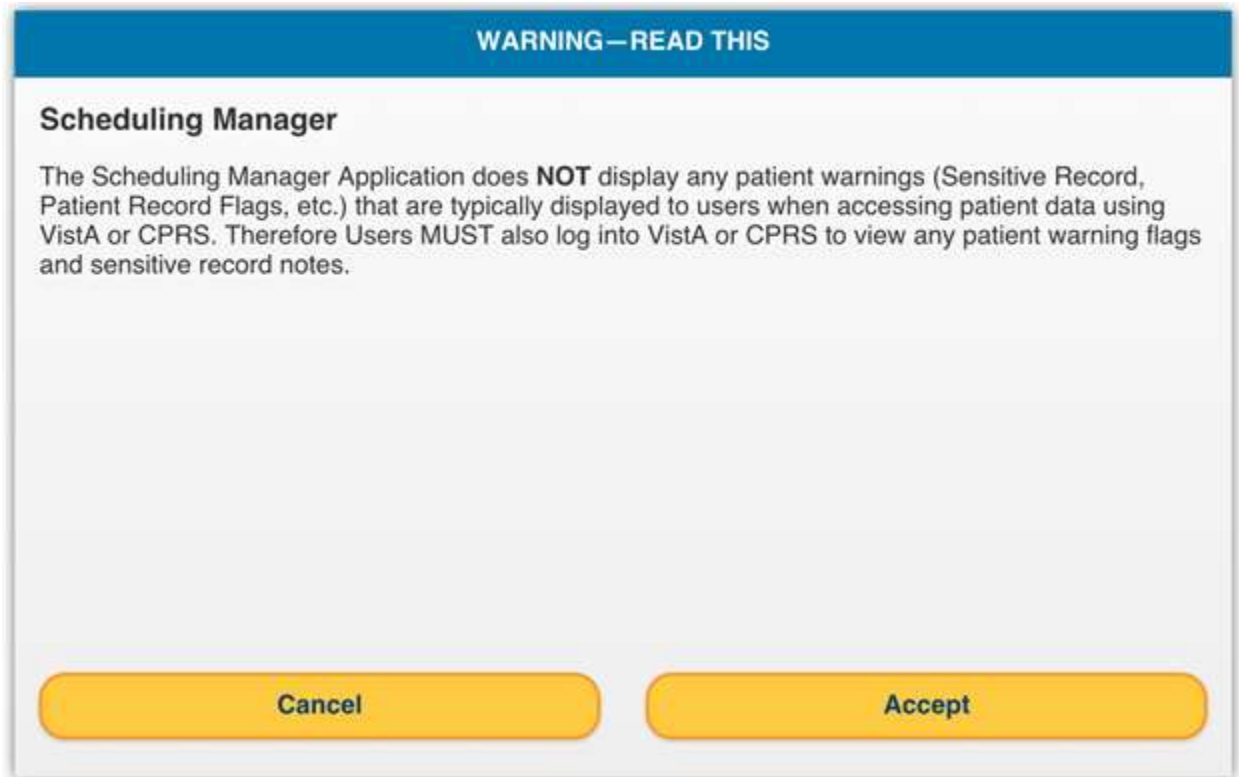


Figure 3 Warning Dialog

After a user logs in, a dialog appears notifying the user that Scheduling Manager does not display any patient warnings usually available to CPRS users. In order to proceed and use the application, the user must select the Accept button. If the user selects the Cancel button, the user is sent back to the Launchpad, still logged in.

Scheduling Manager Home Page

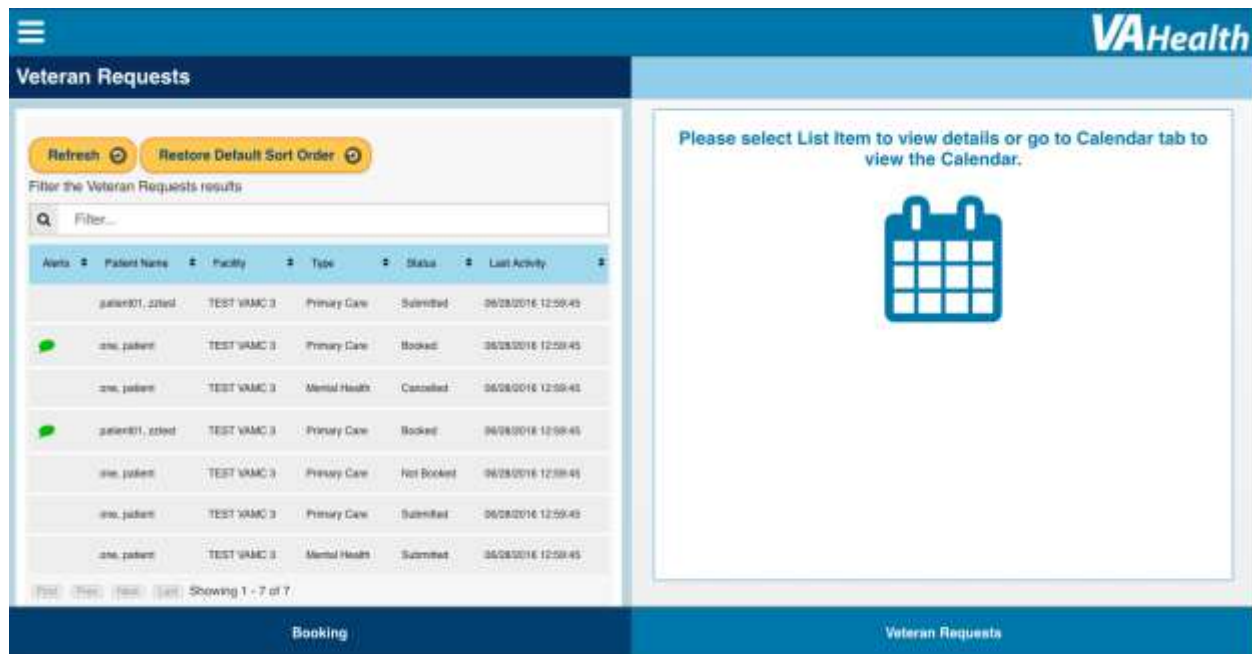


Figure 4 Home Page

At the top-left of the screen is the Menu button. When a user selects this, a menu is opened with the following items:

- **About** – Opens a dialog, which gives a brief summary of the application and its functionality.
- **Refresh Selected Patient** – Refreshes the information in the application for the currently selected patient, if any.
- **Exit** – Opens a popup with options to logout or return to the Launchpad while maintaining the current user session.

The buttons at the bottom of the screen navigate to the features of Scheduling Manager:

- **Booking** – The user can view clinic availability and book or cancel appointments
- **Veteran Requests** – A list of appointment requests for the current facility made by veterans using the Veteran Appointment Requests (VAR) application

By default, the Veteran Requests screen is displayed.

Booking an Appointment

The screenshot displays the VA Health Booking interface. At the top, there is a navigation bar with 'Booking', 'Calendar', and 'Patient' tabs. The 'Booking' tab is active. On the left, a form titled '* Required fields:' contains a 'Clinic' dropdown menu with 'CARDIOLOGY' selected, a 'Desired Date of Appointment' field with '06/29/2016' and a calendar icon, and a large orange 'VIEW AVAILABILITY' button. On the right, a calendar for 'July 2016' is shown. The calendar has a header with 'today', 'Month', 'Week', and 'Day' views. The calendar grid shows dates from Sunday to Saturday. A yellow box labeled 'AVAILABLE' is positioned above the calendar. The calendar cells for the 1st through 29th are highlighted in yellow, indicating availability. The bottom of the page has a blue bar with 'Booking' and 'Veteran Requests' links.

Figure 5 Booking Page

From the booking page, the user can search for a patient, and book an appointment for that patient in a specific clinic.

Searching for a Patient

When the user selects the Patient Search button at the top of the screen, indicated by a magnifying glass icon, the Patient Search dialog appears.

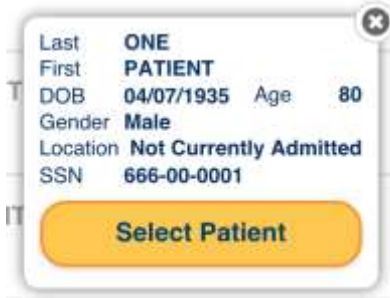


Figure 6 Patient Search Dialog

In the Patient Search Dialog, the user can search for a patient by the following criteria:

- Last Name
- Last Name, First Name
- SSN
- First Initial of Last Name + Last 4 of SSN

When the user enters valid criteria, a list of results will appear below the search field. After selecting a patient from the list, a popup appears displaying the patient's demographic information.



A popup window titled "Patient Search Demographic Popup" with a close button (X) in the top right corner. It displays the following patient information:

Last	ONE
First	PATIENT
DOB	04/07/1935
Age	80
Gender	Male
Location	Not Currently Admitted
SSN	666-00-0001

At the bottom of the popup is a yellow button labeled "Select Patient".

Figure 7 Patient Search Demographic Popup

The user can select the Select Patient button to confirm the selection and place the patient in context. The Patient Search Dialog will then close and the patient's information will be displayed in the header.



A blue header bar containing the following elements from left to right: a white hamburger menu icon, a white magnifying glass icon, the text "ONE, PATIENT 04/07/1935 (80) M 666-00-0001", a white circle with a black "X" icon, and a white folder icon.

Figure 8 Header with Patient in Context

With a patient in context, the user can select the Clear Patient Context button, denoted by an "X" in a circle next to the patient demographics, to clear the current patient from context. The current patient is also cleared from context when the user logs out of the application.

When the user selects the Patient Contact Details button, denoted by a folder icon next to the Clear Patient Context button, a popup will appear with the current patient's Contact Details from VistA. The user can select the Done button to close the popup.



A popup window titled "Patient Contact Details" with a blue header. It contains a table with the following information:


Email Address	
Home Phone Number	(222)-555-8235
Work Phone Number	(222)-555-7720
Address	Any Street Any Town, WEST VIRGINIA 99998

At the bottom of the popup is a yellow button labeled "Done".

Figure 9 Patient Contact Details Popup

Searching for a clinic

In order to book an appointment, the user must first select a clinic. The user can search for a clinic using the Clinic search field. As the user types in the search field, a list of results will appear, and the user can select a clinic from the list.

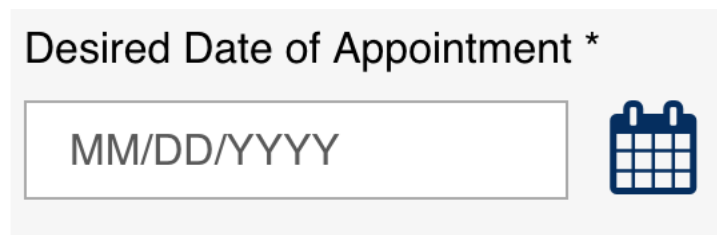


The image shows a search interface for a clinic. At the top, the label "Clinic *" is displayed. Below it is a search input field containing the text "cardiology". To the left of the input is a magnifying glass icon, and to the right is a close button (an 'x' in a circle). Below the input field, a dropdown menu is open, showing a single result: "CARDIOLOGY". To the right of this result is a right-pointing arrow button.

Figure 10 Searching for a Clinic

Choosing a Desired Date

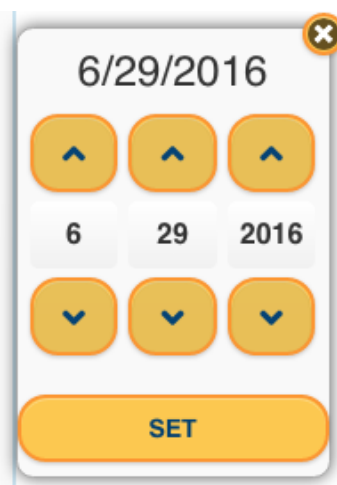
After selecting a clinic, the user must specify a desired date for the appointment. The user can either enter a date in the Desired Date input field, or select the Select Date button, denoted by a calendar icon next to the input field.



The image shows a form element for selecting a date. It has a title "Desired Date of Appointment *". Below the title is a text input field with the placeholder text "MM/DD/YYYY". To the right of the input field is a blue calendar icon.

Figure 11 Desired Date of Appointment field and button

When the user selects the Select Date button, a popup will appear allowing the user to choose a desired date.



The image shows a date selection popup. At the top, the date "6/29/2016" is displayed. Below it are three orange buttons with up arrows for navigating between months. In the center, the date components "6", "29", and "2016" are shown in separate boxes. Below these are three orange buttons with down arrows for navigating between months. At the bottom is a large orange button labeled "SET". A close button (an 'x' in a circle) is located in the top right corner of the popup.

Figure 12 Desired Date Popup

Viewing appointment availability

After selecting a clinic and specifying a desired date, the user can select View Availability to display a calendar showing the availability for the currently selected clinic. The calendar has three views: Month, Week, and Day. The user can switch between views using the Month, Week, and Day buttons above the calendar. Available appointment slots are denoted by shaded boxes with thick borders. A head-and-shoulders icon indicates when a patient has an appointment already scheduled. Appointments can only be booked from Day view.

Above the calendar, the user can see the last time the availability in the calendar was updated in the application. The user can select the Refresh button to manually refresh the availability shown on the calendar.

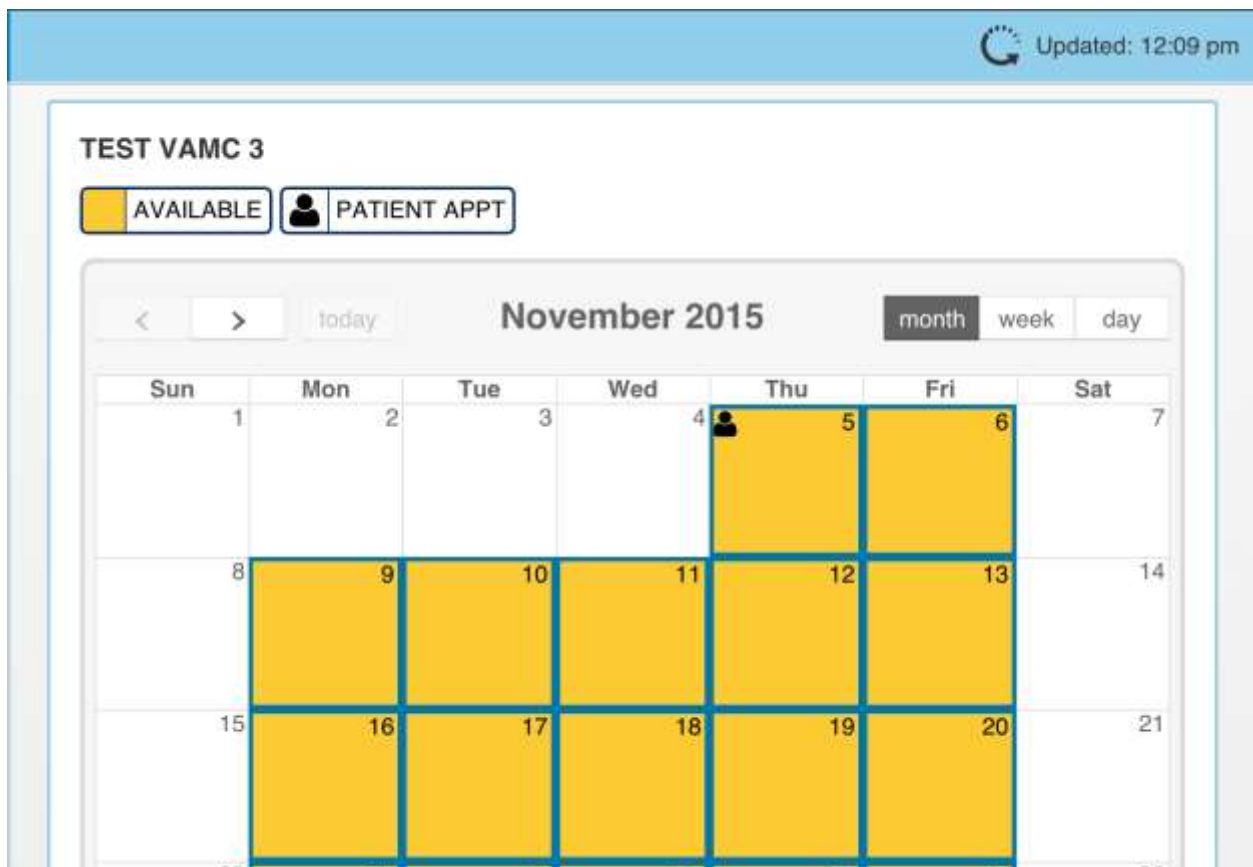


Figure 13 Calendar Month View

By default, the calendar shows the Month view. On the month view, the calendar only displays which days are available and / or the patient already has an appointment. The user can select a day to open the day view.

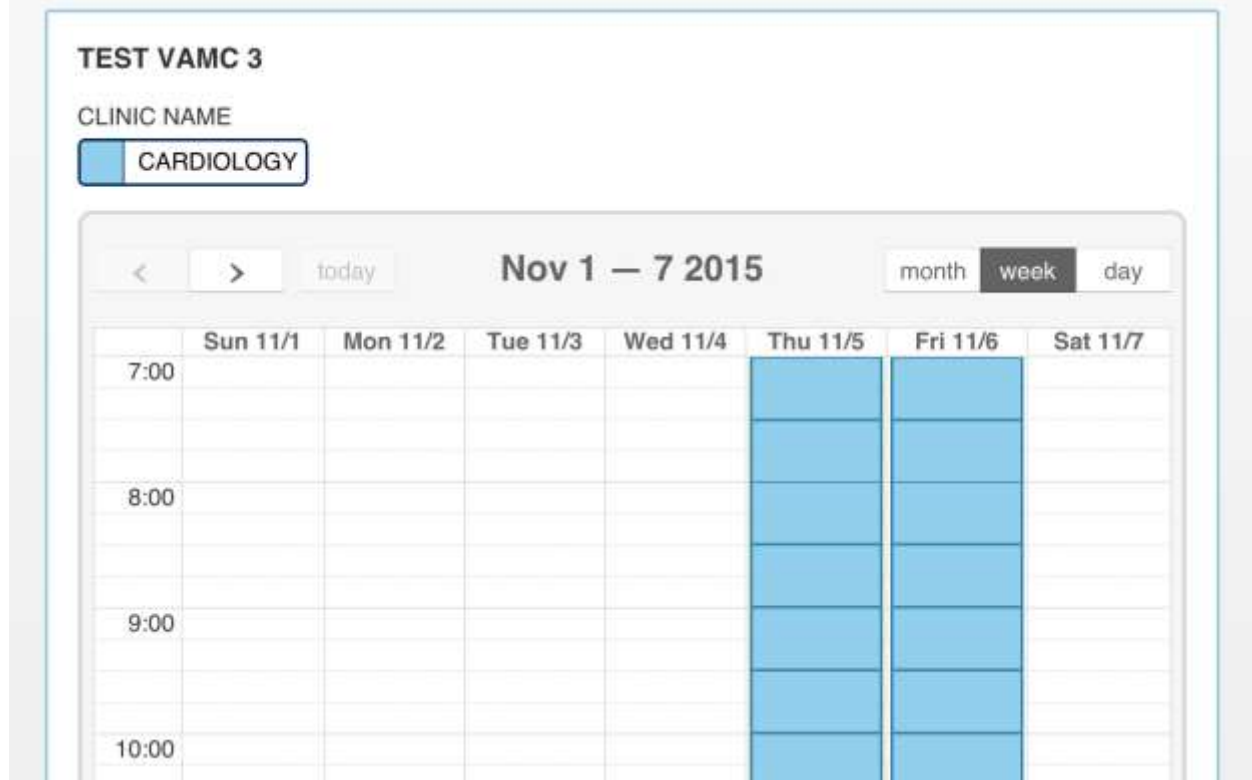


Figure 14 Calendar Week View

On the Week view, the calendar displays which times are available for the entire week. The user can select a time slot on the Week view to open the Day view.

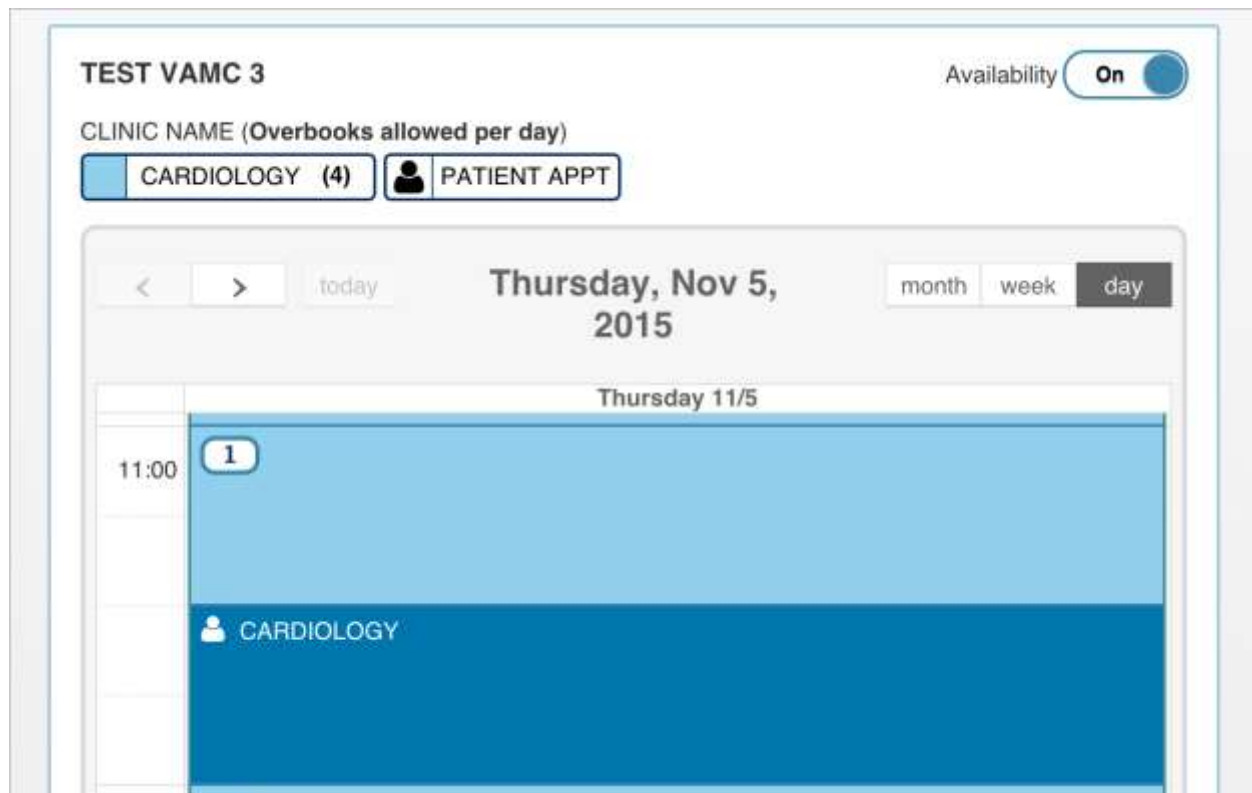
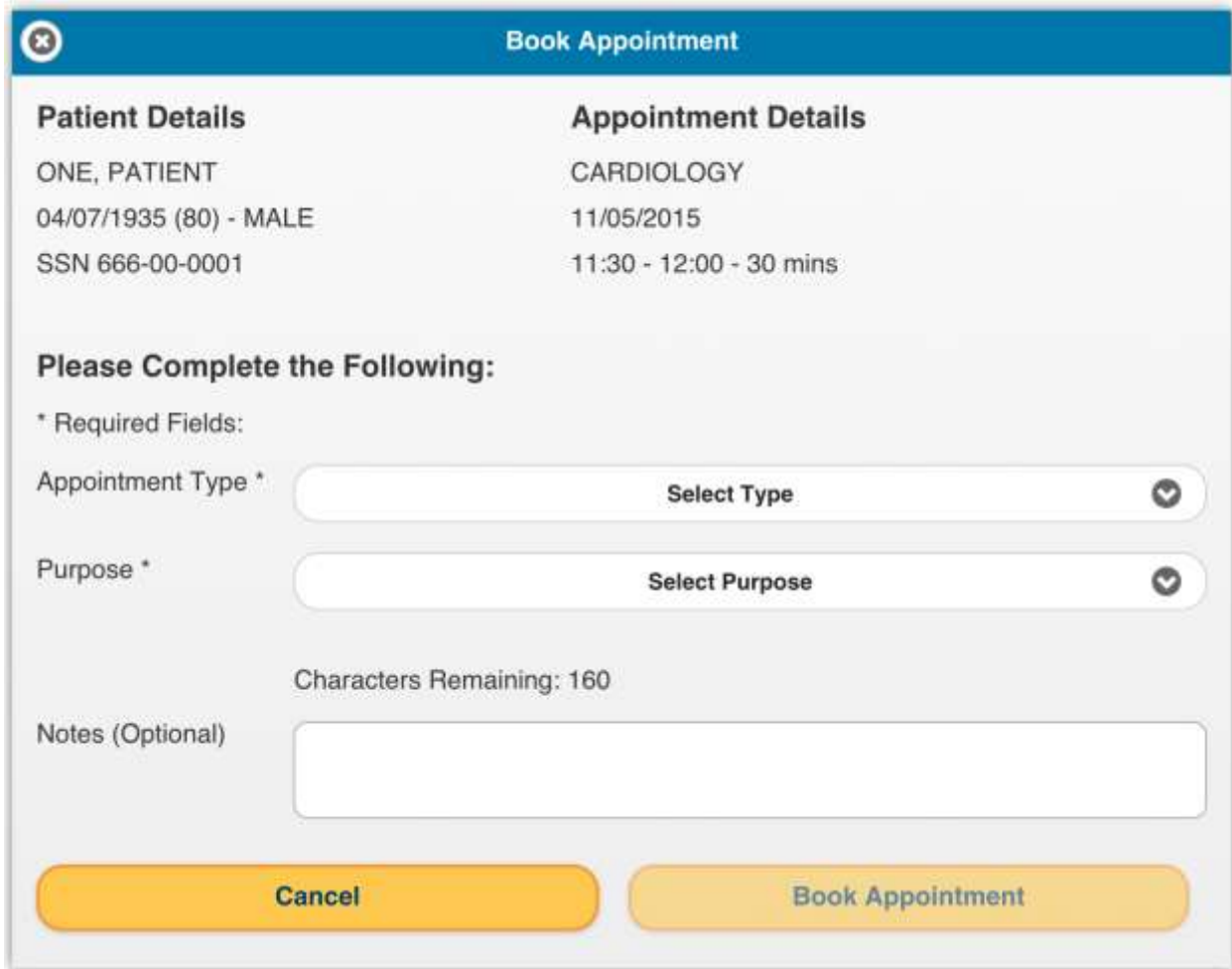


Figure 15 Calendar Day View

On the Day view, the user can see the VistA availability codes for each slot. The user can optionally turn these off using the availability switch above the calendar. Previously booked appointments for the current patient display the clinic where the patient has an appointment.

Book Appointment Dialog



The dialog box is titled "Book Appointment" and features a close button (X) in the top-left corner. It is divided into two main sections: "Patient Details" and "Appointment Details".

Patient Details	Appointment Details
ONE, PATIENT	CARDIOLOGY
04/07/1935 (80) - MALE	11/05/2015
SSN 666-00-0001	11:30 - 12:00 - 30 mins

Please Complete the Following:

* Required Fields:

Appointment Type *

Purpose *

Characters Remaining: 160

Notes (Optional)

Cancel **Book Appointment**

Figure 16 Book Appointment Dialog

When the user selects an appointment slot from the calendar, the Book Appointment Dialog appears. At the top, the demographics for the current patient and the appointment details are shown. If the user selects the Cancel button, they are returned to the calendar on the booking page. To proceed, the user must select an Appointment Type and Purpose from the dropdowns provided. The user can optionally provide comments on the appointment.

Once the fields in the Book Appointment Dialog are filled in correctly, the user can select Book Appointment to book the appointment for the selected patient in VistA.

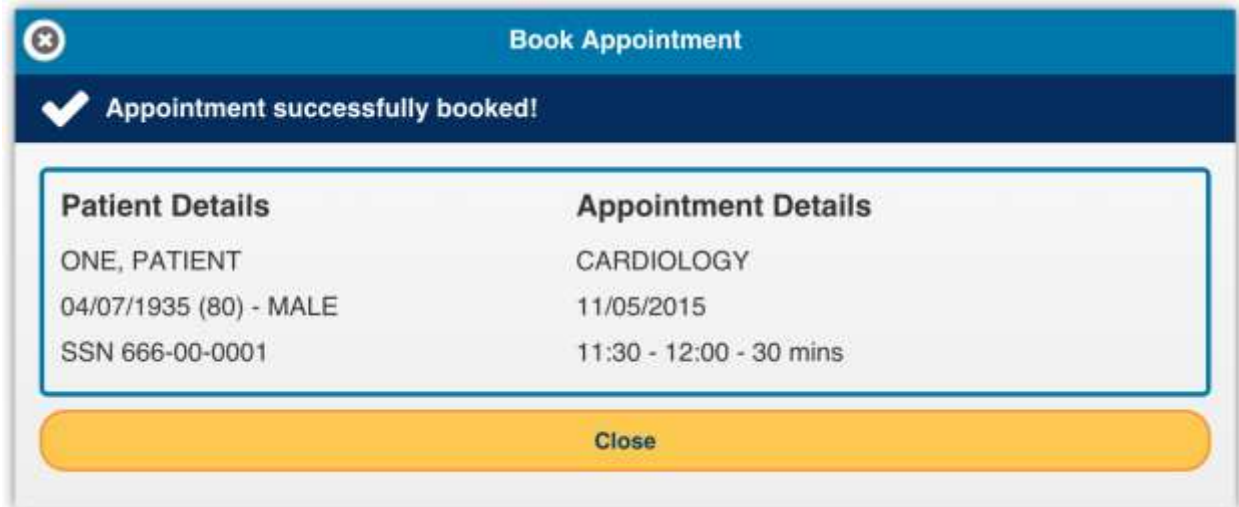


Figure 17 Successful Booking Dialog

After the appointment is booked in VistA, a dialog appears showing a success message to the user, along with the patient demographics and the appointment details. If the appointment failed to book in VistA, the dialog appears with an error message stating why the booking failed. The user can select the Close button to dismiss the dialog and return to the booking page.

Patient-Centric View

If a patient is in context, the user can select the Patient button on the Booking page to view future appointments for the selected patient.

Future Appointments

The screenshot displays the VA Health Patient-Centric View interface. At the top, a blue header bar contains the VA Health logo and patient information: ONE PATIENT, 04/07/1935 (87) M, 666-00-0001. Below the header, a navigation bar includes 'Booking', 'Calendar', and 'Patient' tabs. The 'Patient' tab is active, showing a 'FUTURE APPOINTMENTS' section on the left and a 'Details' section on the right.

FUTURE APPOINTMENTS

Date	Provider Name	Clinic / Specialty
06/29/2016		CARDIOLOGY
06/30/2016		CARDIOLOGY
06/30/2016		CARDIOLOGY
07/01/2016		CARDIOLOGY
07/01/2016		CARDIOLOGY
07/05/2016		CARDIOLOGY
07/05/2016		CARDIOLOGY
08/15/2016		CARDIOLOGY

Details

When in process, this request will be locked for other users. [Cancel Appointment](#)

Clinic Details

Clinic	CARDIOLOGY
Ask For Check In	No

Appointment Details

Current Status	NO ACTION TAKEN/TODAY
Type	
Date	06/29/2016
Time	08:30
Length	30 mins
Booking Notes	

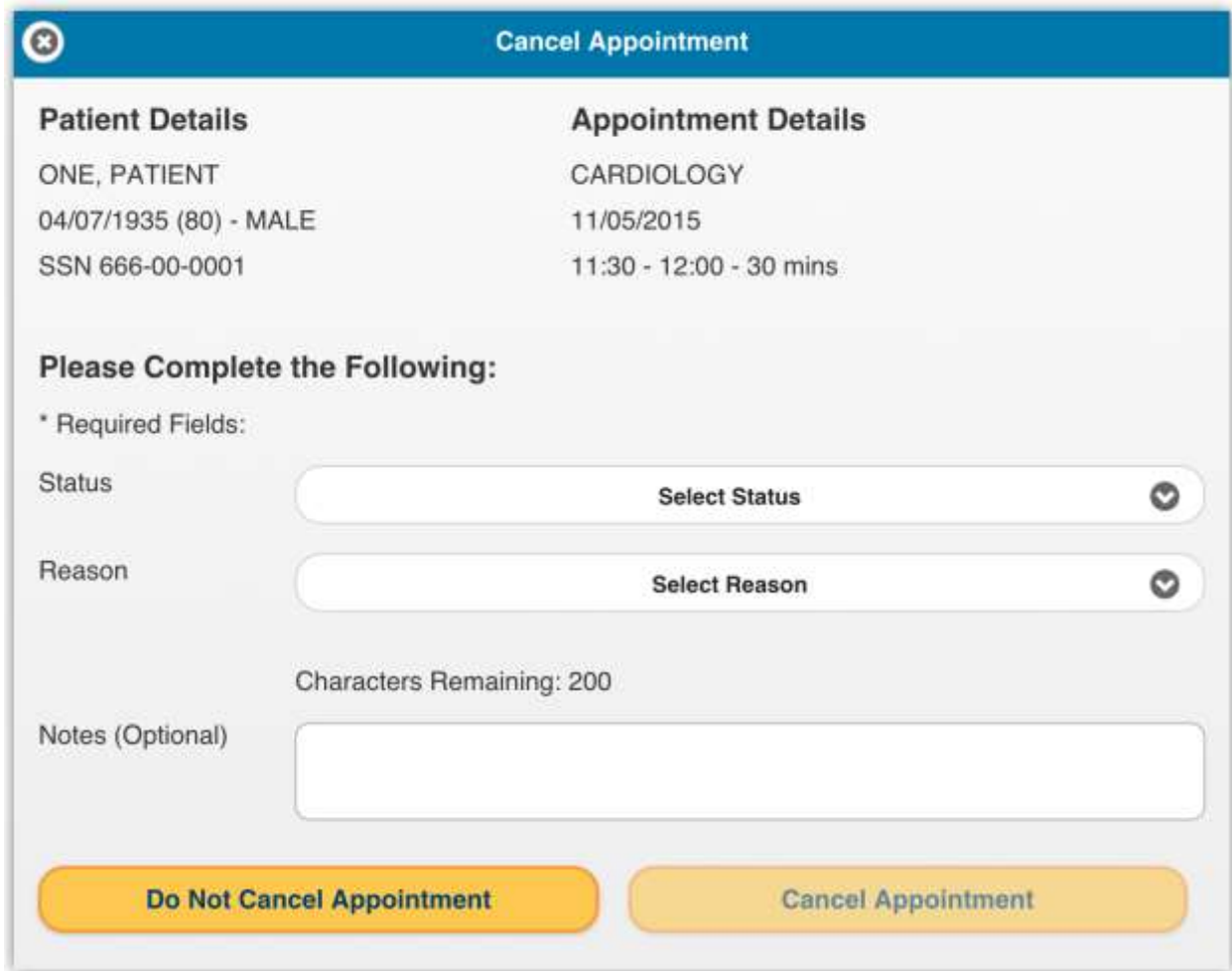
At the bottom, a blue bar contains 'Booking' and 'Veteran Requests' links.

Figure 18 Patient-Centric View

By default, the Future Appointments collapsible is open on the patient-centric view. This list shows all of the upcoming appointments for the current patient. When a user selects an item from the list, the appointment details appear on the right-hand side.

Cancel Appointment

When the user selects Cancel Appointment while viewing details on an appointment for a patient, the Cancel Appointment dialog appears.



The image shows a 'Cancel Appointment' dialog box with a blue header bar containing a close button (X) and the title 'Cancel Appointment'. The dialog is divided into two columns: 'Patient Details' and 'Appointment Details'. The 'Patient Details' column contains the text 'ONE, PATIENT', '04/07/1935 (80) - MALE', and 'SSN 666-00-0001'. The 'Appointment Details' column contains 'CARDIOLOGY', '11/05/2015', and '11:30 - 12:00 - 30 mins'. Below these columns is a section titled 'Please Complete the Following:'. Under this title is a line '* Required Fields:'. There are two dropdown menus: 'Status' with the text 'Select Status' and 'Reason' with the text 'Select Reason'. Below these is a text area for 'Notes (Optional)' with a character count 'Characters Remaining: 200'. At the bottom are two buttons: 'Do Not Cancel Appointment' and 'Cancel Appointment'.

Patient Details	Appointment Details
ONE, PATIENT	CARDIOLOGY
04/07/1935 (80) - MALE	11/05/2015
SSN 666-00-0001	11:30 - 12:00 - 30 mins

Please Complete the Following:

* Required Fields:

Status:

Reason:

Notes (Optional):

Characters Remaining: 200

Do Not Cancel Appointment **Cancel Appointment**

Figure 19 Cancel Appointment Dialog

The Cancel Appointment dialog is similar to the Booking Dialog, except the user must select a status and reason to proceed with cancelling the appointment. The user can also select Do Not Cancel Appointment to dismiss the dialog without cancelling the appointment.

Once the fields are filled in correctly, the user can select Cancel Appointment to cancel the current appointment in VistA.



Figure 20 Cancel Appointment Success Dialog

Once the appointment is cancelled in VistA, a dialog appears showing a success message to the user, along with the patient's demographics and the details of the cancelled appointment. If cancelling the appointment failed, the dialog will appear with an error message explaining why the appointment was not cancelled. The user can select the Close button to return to the Future Appointments list, where the cancelled appointment will no longer appear.

Veteran Requests Page

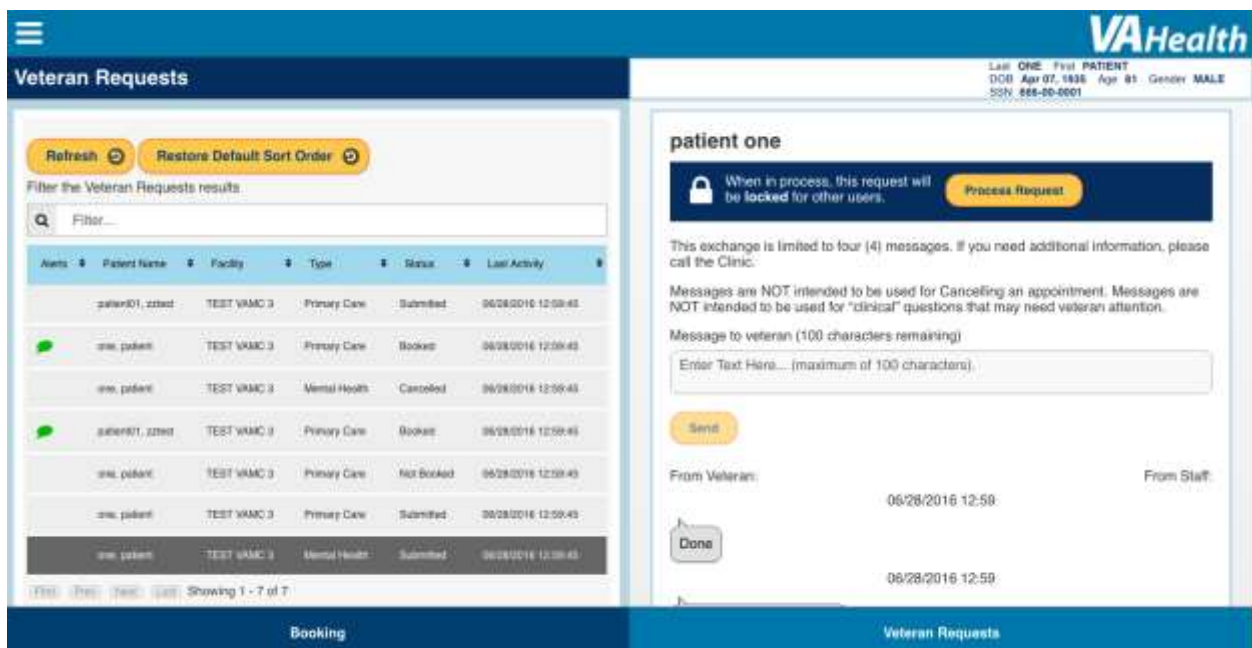


Figure 21 Veteran Requests Page

On the Veteran Requests Page, the user can see a list of the appointment requests made by veterans using the Veteran Appointment Requests (VAR) application. The user can click Refresh to refresh the data in the list. As the user types in the Filter field, the list shows only those items containing the text the user entered. If there is an active filter on the list and/or the user has changed the sorting on the list, the user can select the Restore Default Sort Order button to return the list to its original state.

When the user selects an appointment request from the list, the details for that request are shown on the right, along with the demographic information of the patient who made the request. From the details, the user can send a message to a veteran and read messages sent from the veteran. However, this exchange is limited to four messages total, regardless of who sent the messages.

Processing an Appointment Request

When the user selects Process Request from appointment request details, the patient who made the request is put into context, and the user is directed to the Booking page, where the appointment request details appear in a collapsible beneath the View Availability button.

The screenshot displays the VA Health Booking interface. At the top, there is a header with a menu icon, a search icon, and patient information: "ONE PATIENT", "04/27/2014 (4/1) M", and "66A-00-0001". The "VAHealth" logo is on the right. Below the header are three tabs: "Booking" (selected), "Calendar", and "Patient".

The main content area is divided into two sections. On the left, under the "Booking" tab, there are "Required fields:" including a "Clinic" search field and a "Desired Date of Appointment" field with a calendar icon showing "01/27/2014". Below these is a yellow "VIEW AVAILABILITY" button. Underneath is a collapsible section titled "VETERAN REQUEST DETAILS" which is currently expanded. It contains a table with the following information:

Type of Care	Mental Health
Provider	Tom Cage
Request Date/Time	01/27/2014 AM 01/28/2014 AM 01/29/2014 AM

At the bottom of this section are two buttons: "Cancel Request" and "Unavailable".

On the right side of the interface, there is a large white box with a blue header that says "Please select a Clinic and Desired Date to view availability." Below this box is a large empty space.

At the bottom of the page, there are two tabs: "Booking" (selected) and "Veteran Requests".

Figure 22 Veteran Request Details on the Booking Page

▼

VETERAN REQUEST DETAILS

Type of Care	Primary Care
Provider	zztest appointment_provider1
Request Date/Time	12/27/2013 AM 12/28/2013 AM 12/29/2013 AM

Cancel Request

Unavailable

This exchange is limited to four (4) messages. If you need additional information, please call the Clinic.

Message to veteran

Enter Text Here... (maximum of 100 characters). Messages are NOT intended to be used for Cancelling an appointment. Messages are NOT intended to be used for "clinical" questions that may need

Send

Figure 23 More of the Veteran Request Details Collapsible

The user can message the current patient from the Veteran Request Details collapsible on the Booking Page just like the item details on the Veteran Requests page.

Cancel Request

If the user selects Cancel Request from the Veteran Request Details collapsible, a Cancel Request popup appears, with a list of radio buttons to indicate who cancelled the appointment request. To proceed, the user must select an option from the list. The user can select Return to dismiss the popup.

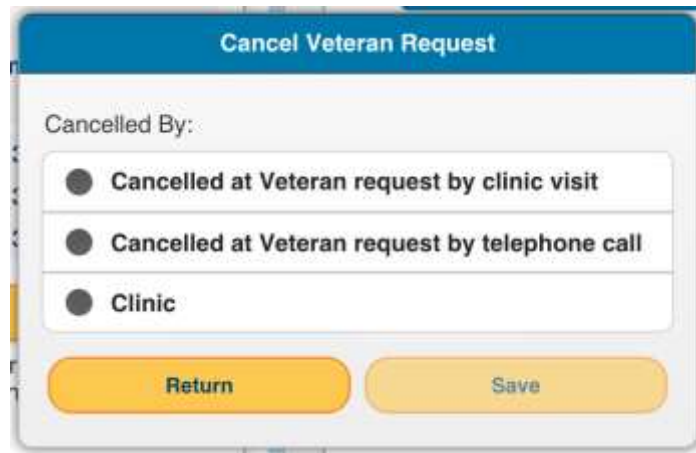


Figure 24 Cancel Request Popup

After the user selects an option from the list and selects the Save button, the patient is removed from context, the Veteran Request Details collapsible disappears, and a success popup appears. After the user dismisses the success popup, the user is returned to the Veteran Requests page.

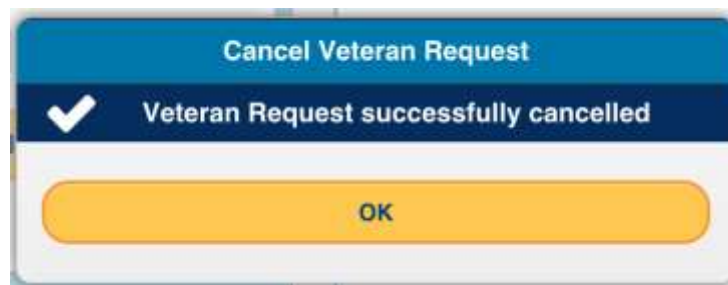


Figure 25 Cancel Veteran Request Success Message

Unavailable

If the user selects Unavailable from the Veteran Request Details Collapsible, a popup appears asking the user to confirm their decision. The user can either select "Return" to dismiss the popup or "Save" to mark the appointment request as Unavailable.

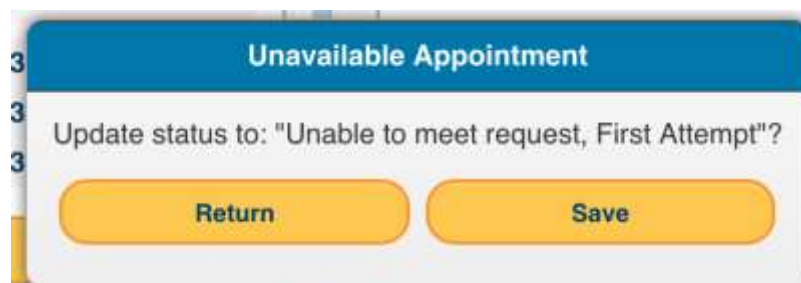


Figure 26 Unavailable Appointment Popup

When the user selects “Save”, the patient is removed from context, the Veteran Request Details Collapsible disappears, and a success popup appears. After the user dismisses the success popup, the user is returned to the Veteran Requests page.

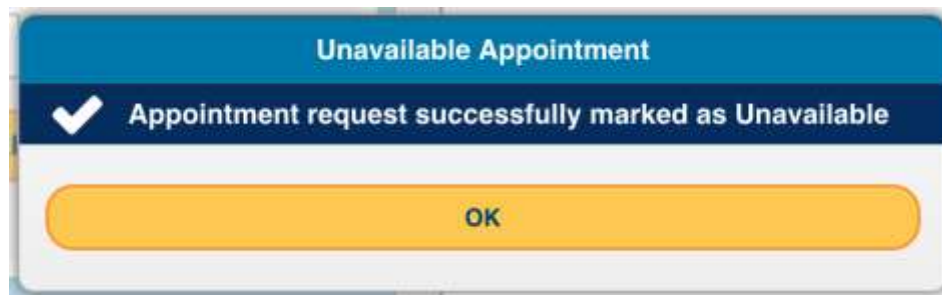


Figure 27 Unavailable Appointment Success Message

Booking an Appointment Request

After selecting Process Request on an appointment request, the user can follow the normal booking process to book an appointment based on that request. When the Book Appointment dialog opens, a new section is displayed entitled Fulfills the Following Veteran Request. The user must select an option under Request date/time in order to proceed.

A screenshot of the "Book Appointment" dialog. The dialog has a blue header bar with a close button (X) and the title "Book Appointment". Below the header bar, there are two columns of details: "Patient Details" and "Appointment Details". The "Patient Details" column contains the text "ONE, PATIENT", "04/07/1935 (80) - MALE", and "SSN 666-00-0001". The "Appointment Details" column contains the text "CARDIOLOGY", "11/06/2015", and "08:00 - 08:30 - 30 mins". Below these columns is a section titled "Fulfills the Following Veteran Request:". This section contains a table with two columns: "Type of Care" and "Request Date/Time *". The "Type of Care" column contains the text "Primary Care". The "Request Date/Time *" column contains a list of radio buttons with the following options: "12/27/2013 AM", "12/28/2013 AM", "12/29/2013 AM", "Booked from alternate after contacting patient", and "Booked from alternate".

Figure 28 Book Appointment Dialog with Veteran Request

When the fields are filled out and the user selects Book Appointment, the application will book the selected appointment in VistA and update the appointment request. A success message will be displayed to the user showing a separate status for the appointment booked in VistA and the appointment request.