

Scheduling Manager (v 1.2.0)

User Guide



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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.....	18
Future Appointments	19
Cancel Appointment.....	19
Patient Wait List	21
Patient Consult Orders	22
Wait List Page	23
Consults Page	25
Veteran Requests Page.....	26
Processing an Appointment Request	26
Cancel Request	28
Unavailable	28
Booking an Appointment Request.....	29

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	19
Figure 19 Cancel Appointment Dialog	20
Figure 20 Cancel Appointment Success Dialog.....	21
Figure 21 Patient Wait List	21
Figure 22 Patient Consult Orders	22
Figure 23 Wait List Page	23
Figure 24 Wait List Details on the Booking Page	23
Figure 25 Book Appointment for Wait List Dialog.....	24
Figure 26 Consults Page	25
Figure 27 Veteran Requests Page.....	26
Figure 28 Veteran Request Details on the Booking Page	27
Figure 29 More of the Veteran Request Details Collapsible.....	27
Figure 30 Cancel Request Popup	28
Figure 31 Cancel Veteran Request Success Message	28
Figure 32 Unavailable Appointment Popup	29
Figure 33 Unavailable Appointment Success Message	29
Figure 34 Book Appointment Dialog with Veteran Request.....	30

General Information

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

Application Overview

Scheduling Manager provides a clerk with the ability to schedule and cancel patient appointments. Patients on the Electronic waitlist, Recall and NEAR lists can be viewed and managed. 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.

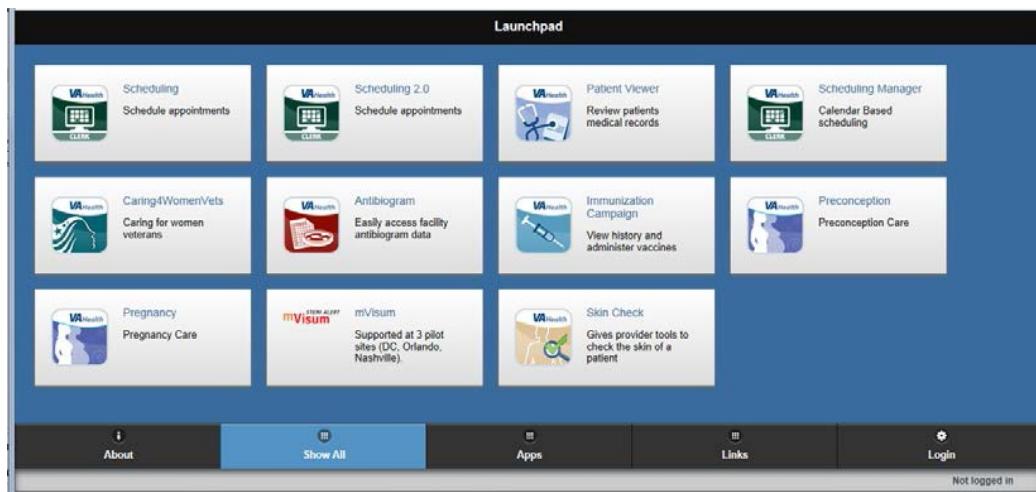


Figure 1 Launchpad

There are 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.

Starting Scheduling Manager

Select the icon labeled "Scheduling Manager – Calendar Based Scheduling". If the user is not logged in the login screen will be displayed.

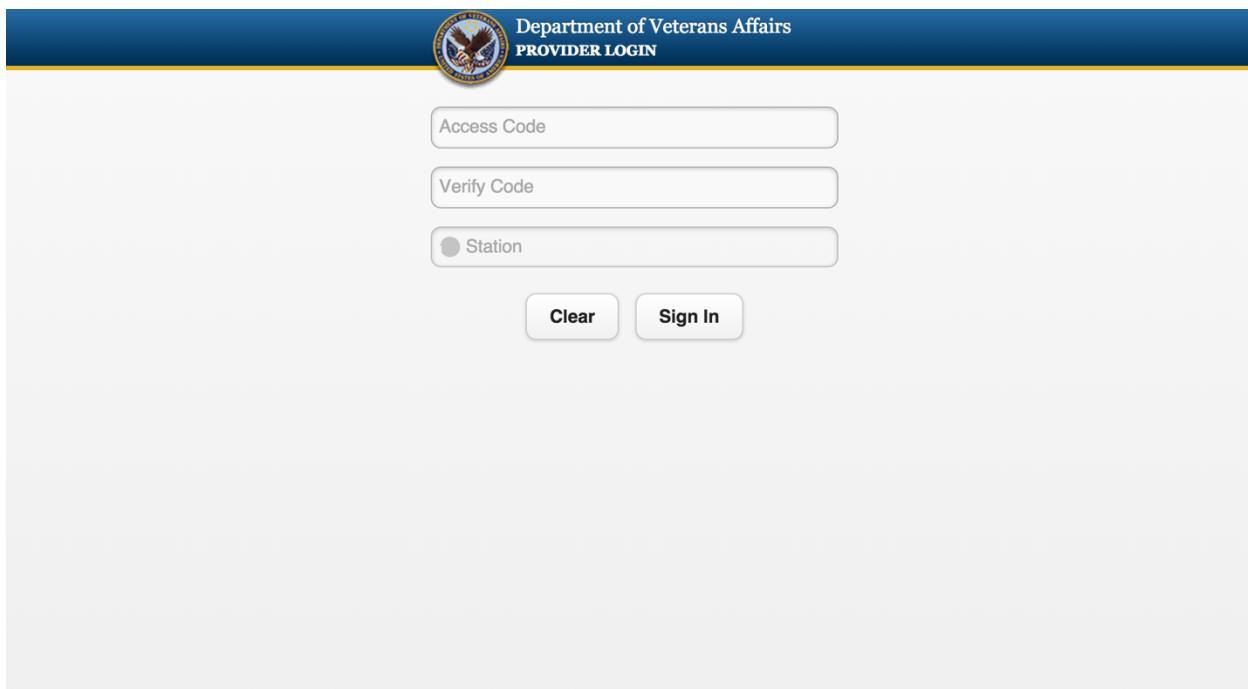


Figure 2 Login Screen

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, the waitlist, 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 !

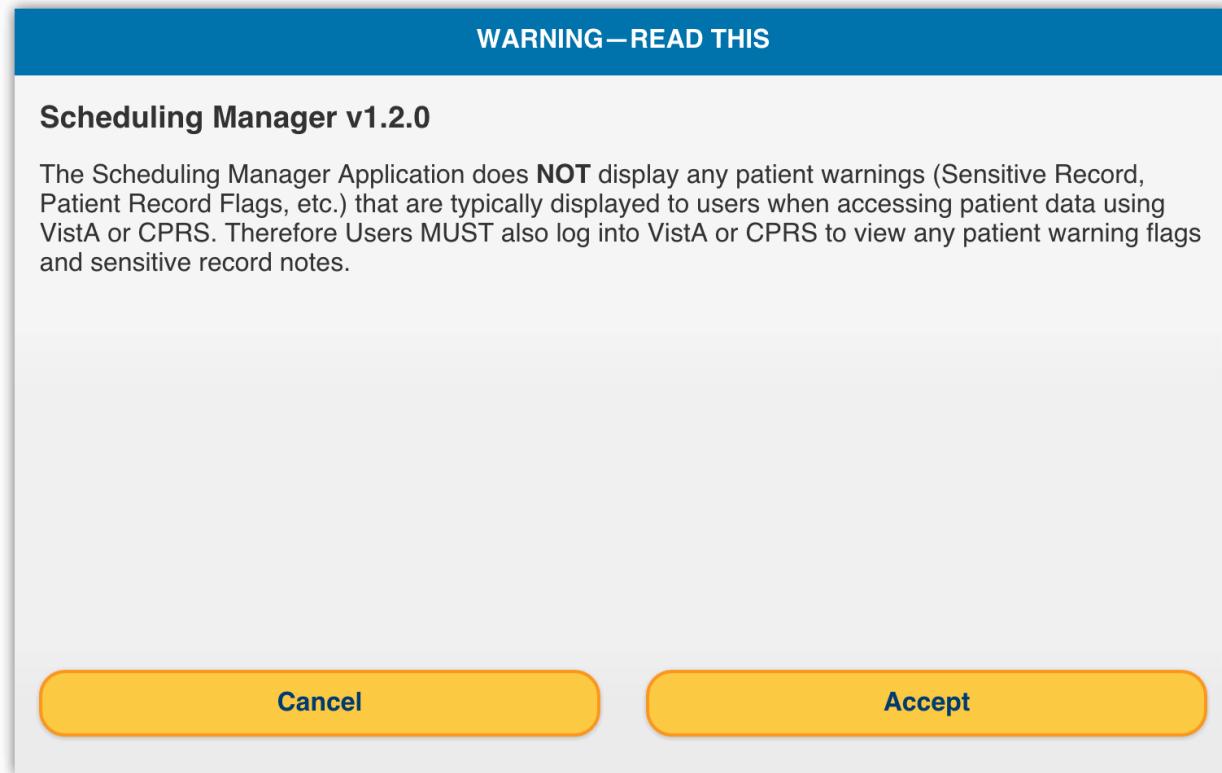


Figure 3 Warning Dialog

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 !

The screenshot shows the Scheduling Manager Home Page. At the top right is the VA Health logo. On the left, there's a sidebar with a menu: 'About', 'Refresh Selected Patient', and 'Exit'. The main content area has a table showing a list of appointments. The table has a header row with columns for 'Type', 'Status', and 'Last Activity'. Below the header are several rows of appointment data. A large blue calendar icon is centered in the main content area with the text: 'Please select List Item to view details or go to Calendar tab to view the Calendar.' At the bottom, there are four navigation buttons: 'Booking', 'Wait List', 'Consults', and 'Veteran Requests'. The bottom left shows the application version 'Scheduling Manager - v1.2.0' and the bottom right shows the user is logged in as 'PROGRAMMER, ONE - TEST VAMC 3'.

Type	Status	Last Activity
AMC 3	Primary Care	Submitted 11/03/2015 12:04:39
AMC 3	Primary Care	Booked 11/03/2015 12:04:39
AMC 3	Primary Care	Booked 11/04/2015 11:16:33
AMC 3	Mental Health	Cancelled 11/04/2015 11:16:33
AMC 3	Primary Care	Not Booked 11/04/2015 11:16:33
AMC 3	Primary Care	Submitted 11/04/2015 11:16:33
AMC 3	Mental Health	Submitted 11/04/2015 11:16:33

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
- **Wait List** – Manages the Electronic Wait List (EWL) of the current facility
- **Consults** – View consults by specialty
- **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 shows the VA Health Scheduling Manager interface. At the top, there's a header with a search icon, patient information (ONE, PATIENT 04/07/1935 (80) M 666-00-0001), and a folder icon. The title 'VAHealth' is on the right with a 'Updated: 11:01 am' timestamp. Below the header, there are tabs for 'Calendar' (selected) and 'Patient'. A sidebar on the left lists 'Required fields:' and 'Clinic *' with a dropdown set to 'CARDIOLOGY'. It also has a date input 'Desired Date of Appointment *' showing '11/05/2015' and a calendar icon. A large yellow button labeled 'VIEW AVAILABILITY' is centered below these fields. The main area is titled 'TEST VAMC 3' and shows a monthly calendar for November 2015. The days of the week are labeled from Sunday to Saturday. The dates are color-coded: white for Sunday, grey for Monday through Saturday, and yellow for all days of the month. Specific dates like the 15th, 16th, 17th, 18th, 19th, and 20th are highlighted with a blue border. Above the calendar, a yellow box says 'AVAILABLE'. Navigation buttons for 'today', 'month', 'week', and 'day' are at the top of the calendar. The bottom of the screen has tabs for 'Booking' (selected), 'Wait List', 'Consults', and 'Veteran Requests'. A footer bar at the bottom includes 'Scheduling Manager - v1.2.0', 'Logged in as PROGRAMMER, ONE - TEST VAMC 3', and a small clock icon.

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 class icon, the Patient Search dialog appears.

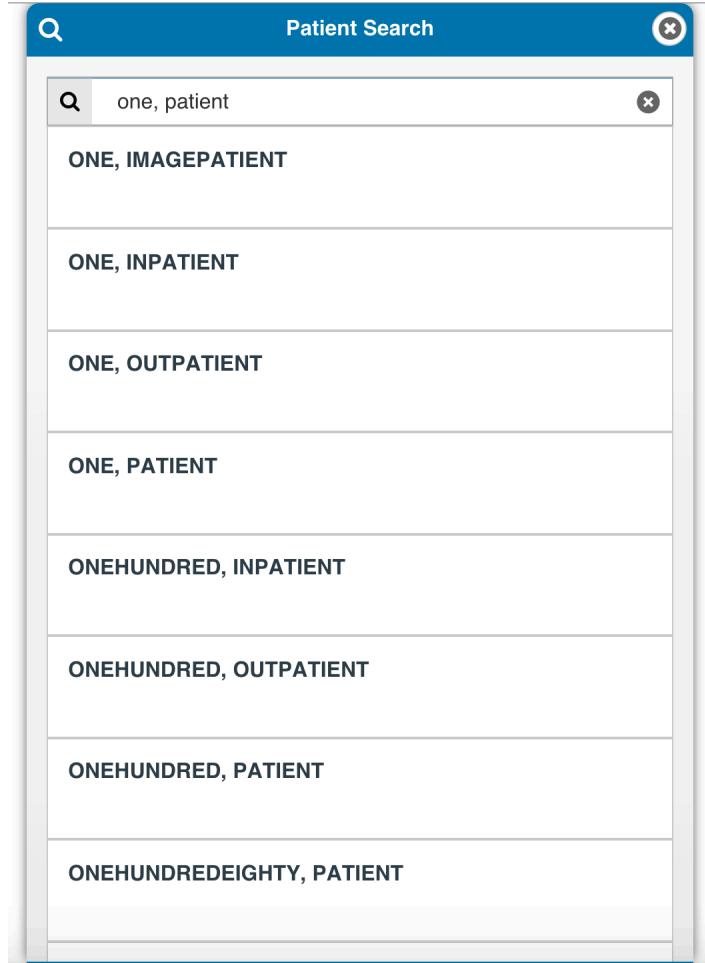


Figure 6 Patient Search Dialog

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.

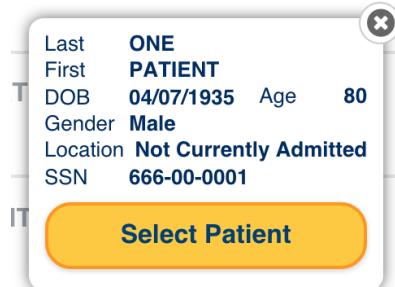


Figure 7 Patient Search Demographic Popup

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.



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.

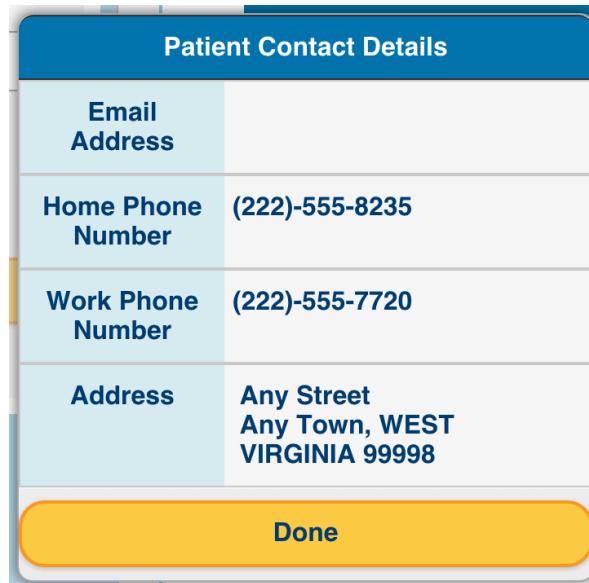
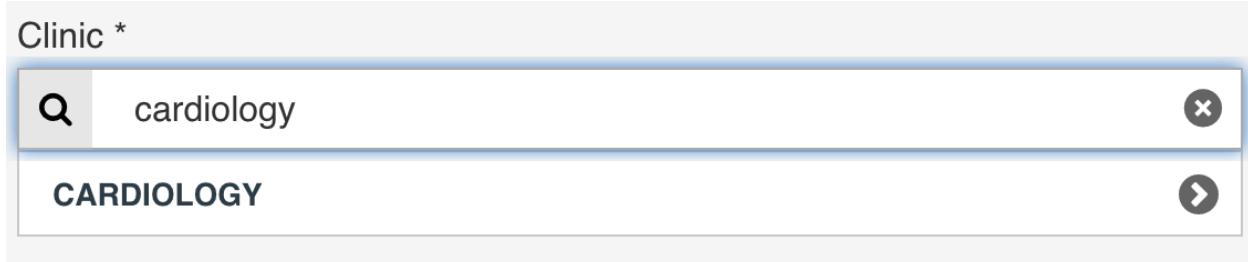


Figure 9 Patient Contact Details Popup

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.

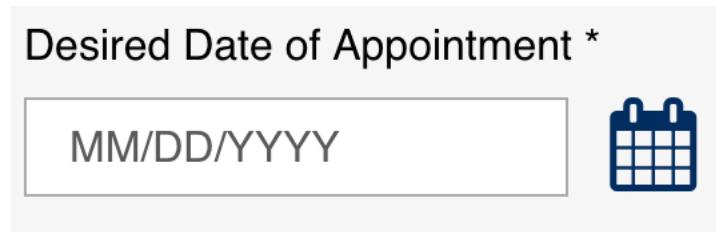


The screenshot shows a search interface for clinics. At the top, there is a label "Clinic *". Below it is a search bar containing the text "cardiology". To the right of the search bar are two icons: a magnifying glass and a close (X) button. Below the search bar is a list of results. The first result is "CARDIOLOGY", followed by a right-pointing arrow icon. The background of the interface is light gray.

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 screenshot shows a form field labeled "Desired Date of Appointment *". Below the label is a text input field containing "MM/DD/YYYY". To the right of the input field is a blue calendar icon. The background of the form is light gray.

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.

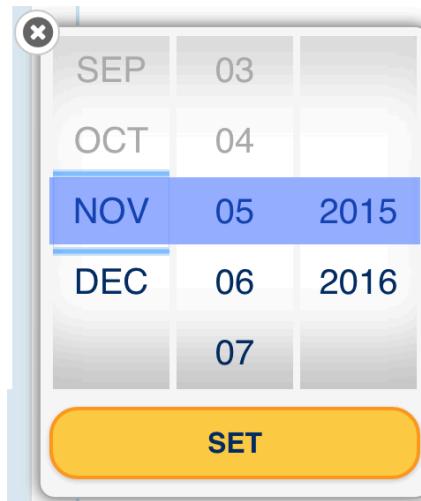


Figure 12 Desired Date Popup

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.

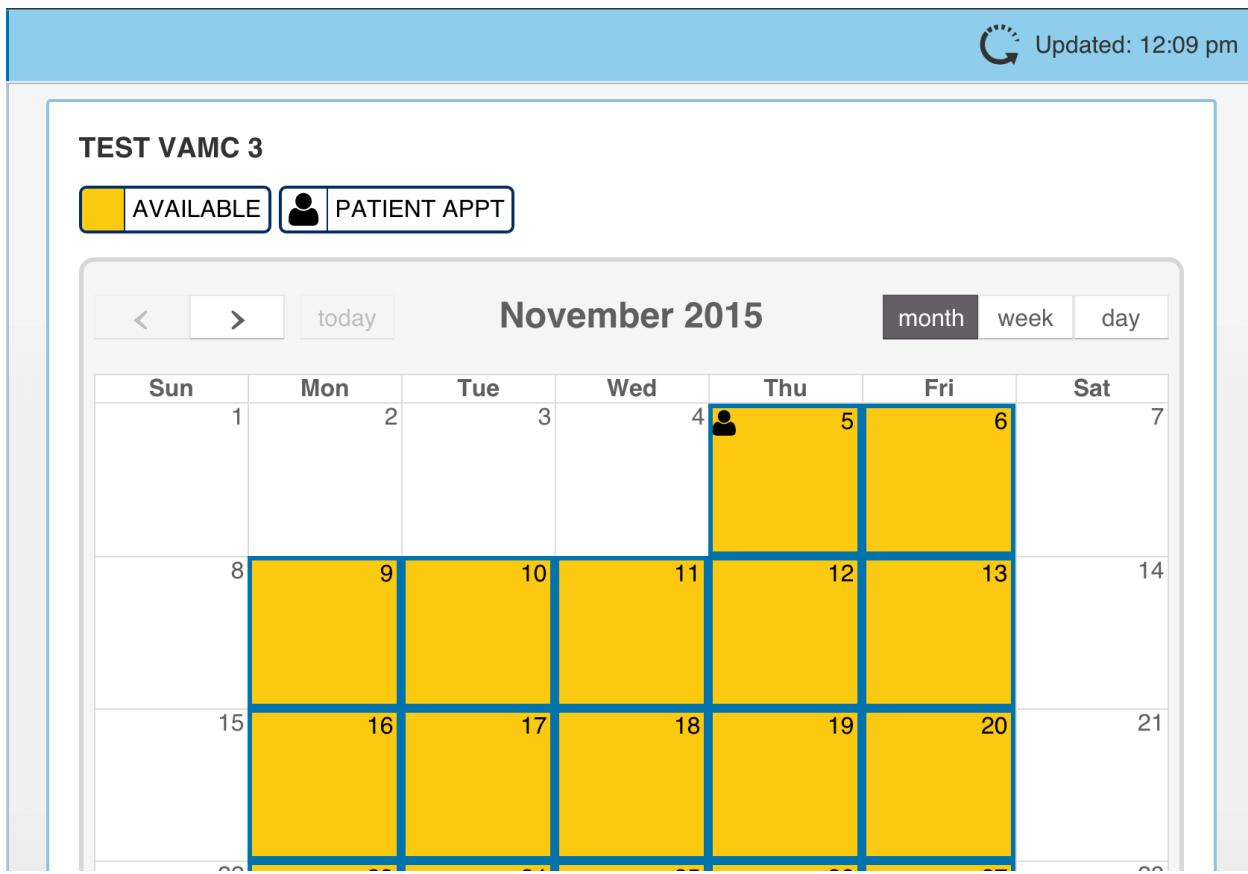
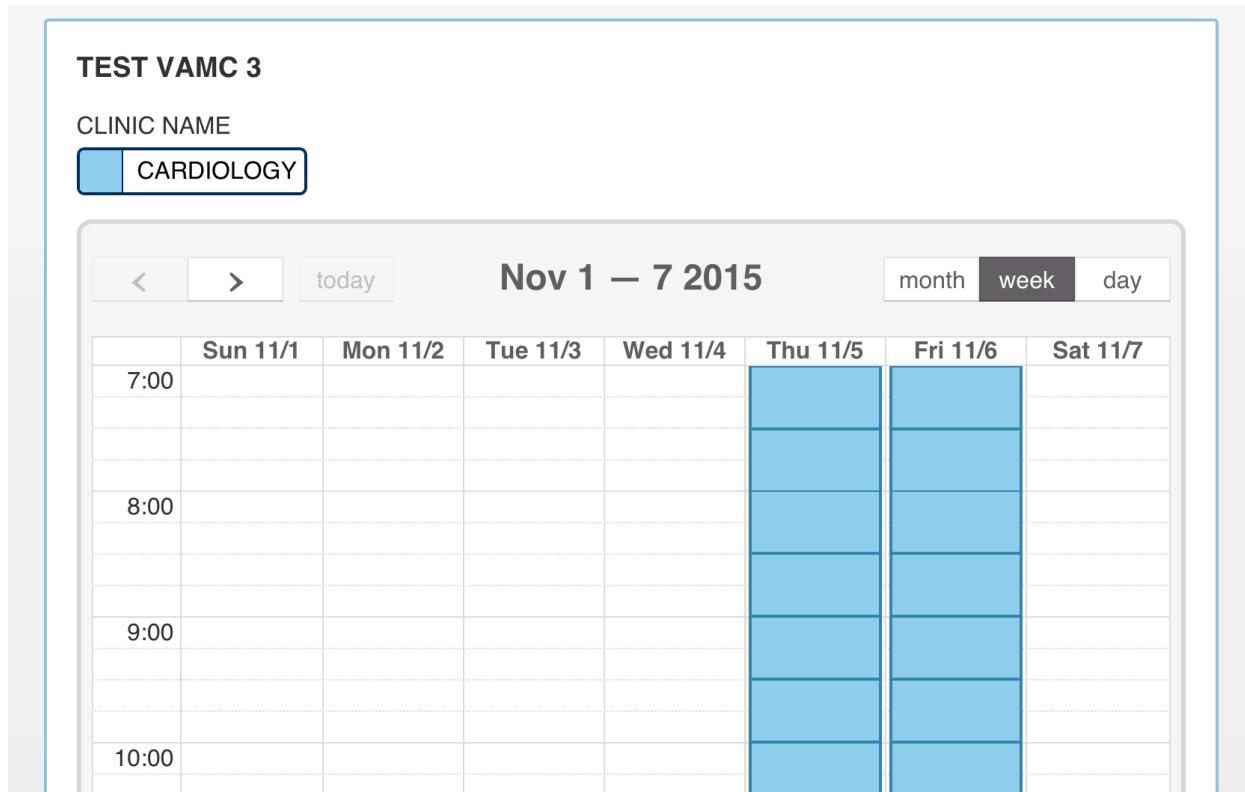


Figure 13 Calendar Month View

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.



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.

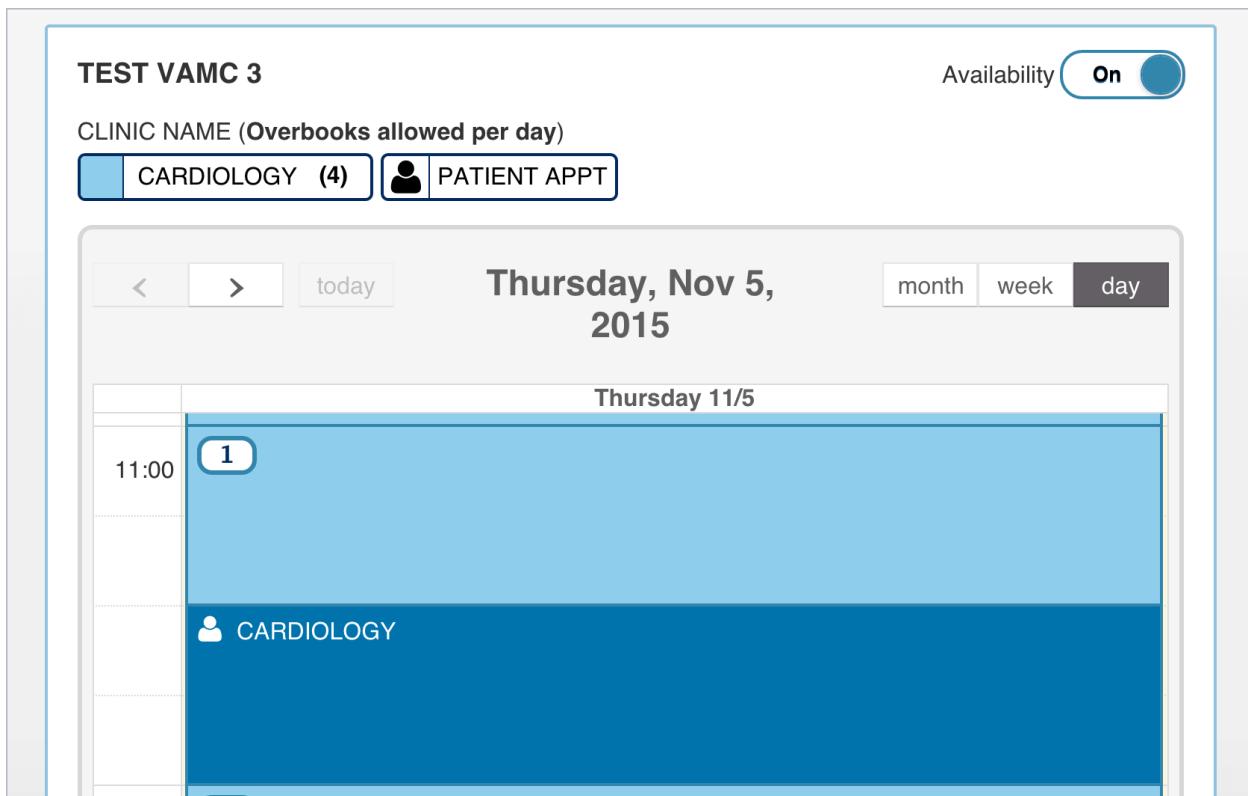


Figure 15 Calendar Day View

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 screenshot shows a modal dialog titled "Book Appointment". At the top left is a close button (X). The title bar says "Book Appointment". The dialog is divided into two main sections: "Patient Details" on the left and "Appointment Details" on the right.

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.

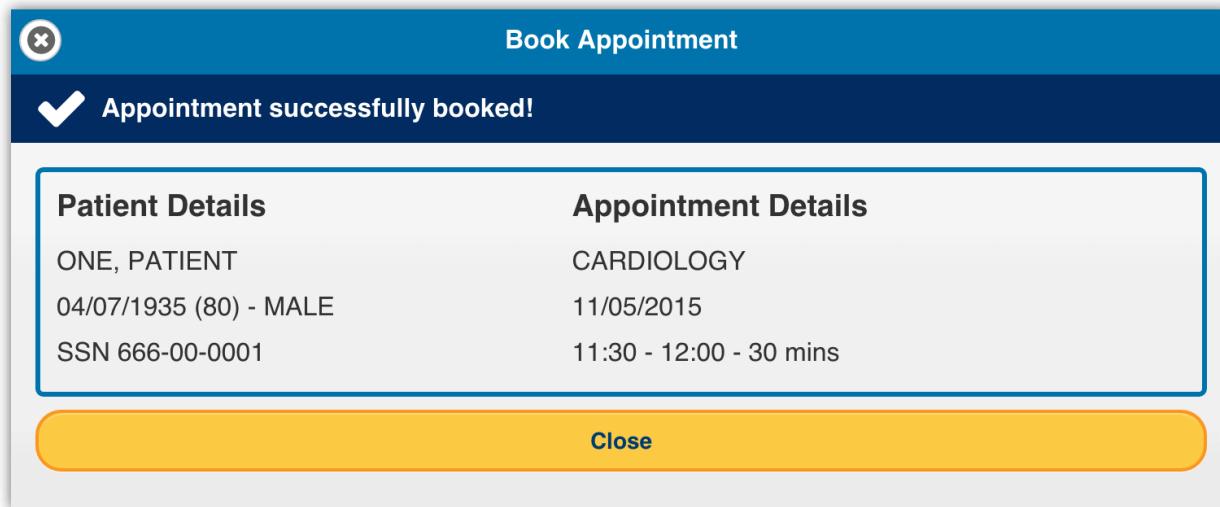


Figure 17 Successful Booking Dialog

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.

Related Wait List Entries / Consults

When the user selects Close from the Successful Booking Dialog, another dialog appears displaying any Wait List Entries or Consults for the current patient related to the scheduled appointment. If the current patient does not have Wait List Entries or Consults, the user is returned to the Booking Page.

 Wait List Entries / Consults

Patient Details	Appointment Details
ZZZRETFIVEFORTYSEVEN, PATIENT	CARDIOLOGY
04/07/1935 (80) - MALE	12/01/2015
SSN 666-76-7766	08:30 - 09:00 - 30 mins

The following Wait List items match the appointment details, select any you wish to remove:

SC: 50 + 11/03/2015

The following Consults match the appointment details, select any you wish to remove:

CARDIOLOGY Cons 12/08/1998

HEMATOLOGY NEW NAME Cons 11/19/1998

HEMATOLOGY NEW NAME Cons 11/19/1998

Close **Update**

The user can select any Wait List Entries or Consults and select Update to process them in VistA so they will no longer be shown in Scheduling Manager. Or the user can select Close to dismiss the dialog and return to the Booking Page without updating any Wait List Entries or Consults.

Patient-Centric View

If a patient is in context, the user can select the Patient button on the Booking page to view future appointments, wait list items, and pending consults for the selected patient.

Future Appointments !

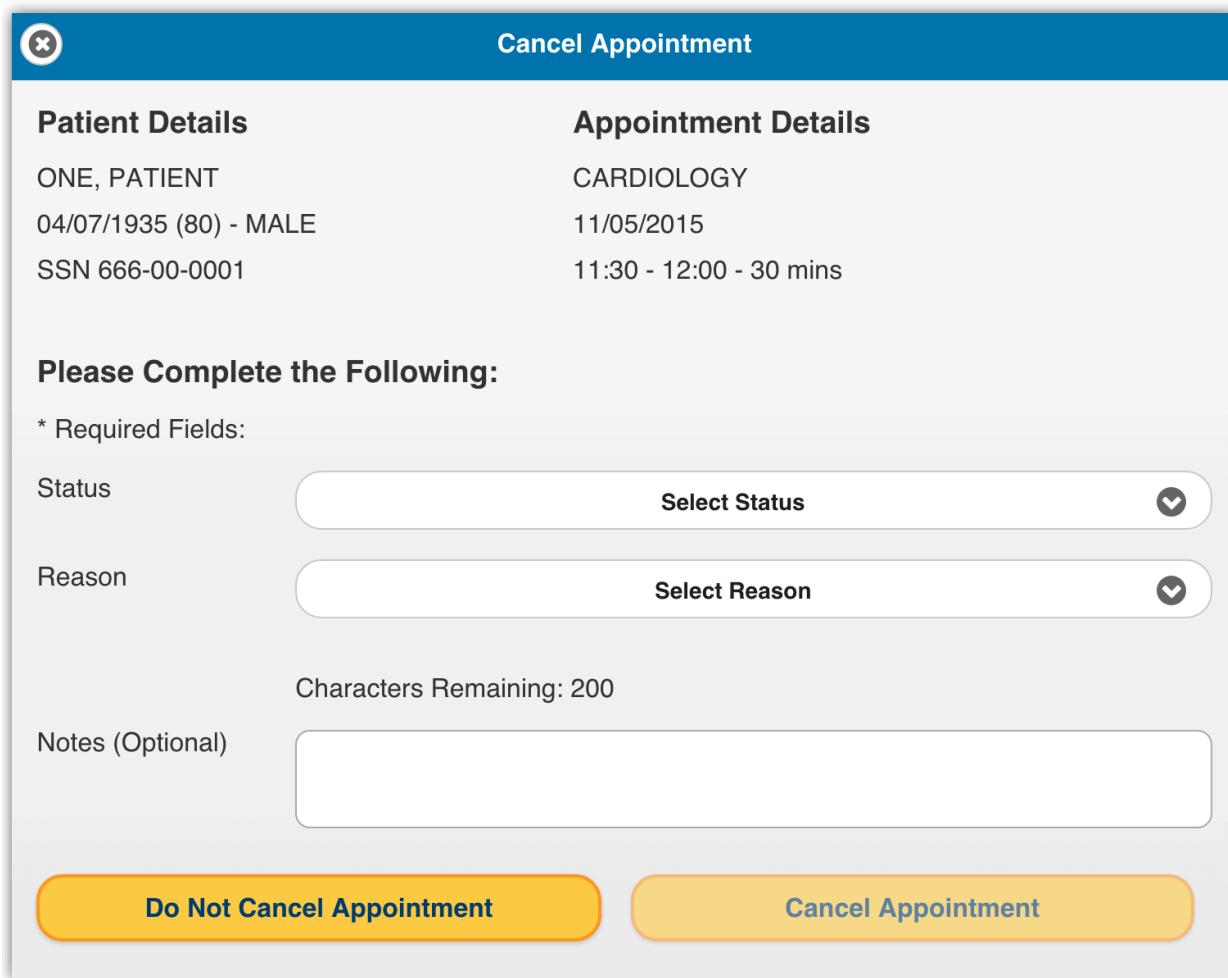
The screenshot shows the VA Health Patient-Centric View. At the top, there are navigation icons for search, patient file, calendar, and patient. The top right corner displays the VA Health logo and the time as 11:03 am. Below the header, the main content area has tabs for 'Calendar' and 'Patient'. The 'Patient' tab is active. On the left, a sidebar titled 'FUTURE APPOINTMENTS' lists upcoming appointments. It includes filters for Date, Provider Name, and Clinic / Specialty. Under 'Date', it shows '11/05/2015' with 'CARDIOLOGY' selected. Below this are sections for 'WAIT LIST' (1 item) and 'CONSULT ORDERS' (14 items). The main panel on the right shows 'Clinic Details' for 'CARDIOLOGY' with 'Ask For Check In' set to 'No'. Under 'Appointment Details', it shows 'NO ACTION TAKEN/TODAY' as the current status. It also lists appointment details: Type (11/05/2015 at 11:30, 30 mins). At the bottom, there are tabs for 'Booking', 'Wait List', 'Consults', and 'Veteran Requests'. The 'Booking' tab is active. A footer at the bottom left says 'Scheduling Manager - v1.2.0' and the bottom right says 'Logged in as PROGRAMMER, ONE - TEST VAMC 3'.

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 screenshot shows the 'Cancel Appointment' dialog box. At the top, there is a blue header bar with the title 'Cancel Appointment'. Below the header, there are two sections: 'Patient Details' and 'Appointment Details'. The 'Patient Details' section contains the following information:

- ONE, PATIENT
- 04/07/1935 (80) - MALE
- SSN 666-00-0001

The 'Appointment Details' section contains the following information:

- CARDIOLOGY
- 11/05/2015
- 11:30 - 12:00 - 30 mins

Below these sections, there is a bolded heading 'Please Complete the Following:' followed by a note '* Required Fields:'. There are two dropdown menus: 'Status' and 'Reason', both labeled 'Select Status' and 'Select Reason' respectively. A text input field for notes is present with a character limit of 200, labeled 'Characters Remaining: 200'. An optional notes field is also available. At the bottom, there are two large buttons: 'Do Not Cancel Appointment' on the left and 'Cancel Appointment' on the right.

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.

Patient Wait List

From the Patient Centric View, the user can open the Wait List collapsible to view a list of all the items on the Electronic Wait List (EWL) for the current patient.

Figure 21 Patient Wait List

When the user selects an item from the list, the details for the Wait List item appear on the right. The user can select the Book Appointment button above the details to process the Wait List Item.

Patient Consult Orders

From the Patient Centric View, the user can open the Consult Orders collapsible to view a list of all the pending Consult Orders for the current patient.

The screenshot shows the VA Health Patient Centric View interface. At the top, there is a header bar with icons for search, patient information (ONE, PATIENT 04/07/1935 (80) M 666-00-0001), and a folder icon. To the right, it says "VAHealth" and "Updated: 11:03 am". Below the header, there are two main tabs: "Calendar" and "Patient". The "Patient" tab is selected. On the left, there is a sidebar with three collapsed sections: "FUTURE APPOINTMENTS", "WAIT LIST", and "CONSULT ORDERS" (which is expanded, showing 14 items). The main content area displays a list of consult orders with columns for "Service / Specialty", "Order Date", and "Days". Each row has a "View Details" button. The first item in the list is "HEMATOLOGY NEW NAME Cons" on 12/06/1995. To the right of the list, detailed information for the selected item is shown, including PC Team (RED), Pat. Status (Outpatient), Primary Eligibility (SC LESS THAN 50% (VERIFIED)), Patient Type (SC VETERAN), and OEF/OIF (NO). It also lists Service Connection/Rated Disabilities (SC Percent: 10%, Rated Disabilities: NONE STATED). Below that is Order Information, which includes To Service (HEMATOLOGY NEW NAME), Attention (PROGRAMMER,TWENTY), From Service (7A SURG), Requesting Provider, Service is to be rendered on an INPATIENT basis, Place (Consultant's choice), Urgency (Routine), Earliest Appr. Date, Orderable Item, Consult (Consult Request), Provisional Diagnosis (test), and Reasons For Request. At the bottom of the page, there are tabs for "Booking", "Wait List", "Consults", and "Veteran Requests". The "Wait List" tab is selected. A footer at the bottom left says "Scheduling Manager - v1.2.0" and a footer at the bottom right says "Logged in as PROGRAMMER, ONE TEST VAMC 3".

Figure 22 Patient Consult Orders

When the user selects a Consult Order from the list, the details for that Consult Order appear on the right. The user can select Print Consult to generate a pdf of the details for the Consult Order.

Wait List Page !

The screenshot shows the Wait List page for TEST VAMC 3. On the left, the EWL table lists patients with their names, ages, and days on list. A message at the top right indicates a request is in process and locked for other users. To the right, an Overview section shows clinic and stop code details. Below that, Request Details provide appointment information like date, priority, and last updated. At the bottom, tabs for Booking, Wait List, Consults, and Veteran Requests are visible.

Patient	Service Connected Priority	Days on List
PATIENT.DELETE	50 +	181
ALPHATEST,NEW ONE	50 +	2
ONEHUNDRED,INPATIENT	50 +	2
ONE,PATIENT	50 +	2
TEN,PATIENT	50 +	2
ZZZRETFIVEFORTYSEVEN,PATIENT	50 +	2

*List only shows actionable items

Booking Wait List Consults Veteran Requests

Figure 23 Wait List Page

From the Wait List page, the user can view the Electronic Wait List (EWL) for the current facility. When the user selects an item from the list, the details for that item and the demographic information for the patient associated with the item are shown on the right.

When the user selects Book Appointment from a Wait List item, the patient associated with the Wait List Item is placed in context and the user is redirected to the Booking page, where the details for the Wait List item are displayed below the View Availability button.

The screenshot shows the Booking page with wait list details. It includes fields for Clinic selection, Desired Date of Appointment (set to 07/30/2014), and a View Availability button. Below this, an Overview section displays clinic and stop code details, and a Request Details section shows the selected appointment date.

* Required fields:

Clinic *

Desired Date of Appointment *

07/30/2014

VIEW AVAILABILITY

Overview

Clinic

Stop Code

Request Details

Desired Date of Appointment 07/30/2014

Figure 24 Wait List Details on the Booking Page

The user can follow the booking process as usual to book an appointment based on the Wait List Item. When the Book Appointment dialog appears, the details of the Wait List Item appear below the patient demographics and appointment details.

The screenshot shows a mobile application interface titled "Book Appointment". At the top, there is a "Patient Details" section containing the patient's name (PATIENT, DELETE), date of birth (04/07/1935 (80) - MALE), and SSN (SSN 666-56-3562). To the right, under "Appointment Details", is the specialty (CARDIOLOGY), date (11/06/2015), and time (08:00 - 08:30 - 30 mins). Below this, a section titled "Fulfils the Following Wait List Entry:" lists the entry type (EWL), days (181), and desired date (07/30/2014). The main body of the dialog is titled "Please Complete the Following:" and includes fields for "Appointment Type" (with a dropdown labeled "Select Type") and "Purpose" (with a dropdown labeled "Select Purpose"). A note indicates "Characters Remaining: 160". There is also an optional "Notes (Optional)" text area. At the bottom, there are two large buttons: "Cancel" on the left and "Book Appointment" on the right.

Figure 25 Book Appointment for Wait List Dialog

When the user selects Book Appointment, the application attempts to remove the Wait List Entry in addition to booking the appointment. After the appointment is booked, the successful booking dialog shows a separate status to indicate whether the Wait List Entry was successfully removed from the Wait List.

Consults Page !

The screenshot shows the VA Health Consults Page. At the top right, there is a header with the VA Health logo and patient details: Last: FOUR, First: PATIENT, DOB: Apr 07, 1935, Age: 80, Gender: MALE, SSN: 666-00-0004. Below the header, there is a search bar for 'Service / Specialty' set to 'CARDIOLOGY'. A table lists consults for 'FOUR.PATIENT' with status 'PENDING', order date '11/03/2015', and 1 day remaining. To the right, a detailed view of the selected consult shows the following information:

Current PC Team: BLUE
Current Pat. Status: Outpatient
Primary Eligibility: SC LESS THAN 50% (VERIFIED)
Patient Type: SC VETERAN
OEF/OIF: NO

Service Connection/Rated Disabilities:
SC Percent: 10%
Rated Disabilities: NONE STATED

Order Information:
To Service: CARDIOLOGY
From Service: PRIMARY CARE
Requesting Provider: PROGRAMMER.ONE
Service is to be rendered on an OUTPATIENT basis
Place: Consultant's choice
Urgency: Routine
Earliest Appr. Date: Nov 03, 2015
Orderable Item: CARDIOLOGY
Consult: Consult Request
Reason For Request: patient experiencing chest pains

At the bottom, there are tabs for Booking, Wait List, Consults (which is active), and Veteran Requests. The footer includes the text 'Scheduling Manager - v1.2.0' and 'Logged in as PROGRAMMER, ONE - TEST VAMC 3'.

Figure 26 Consults Page

On the Consults Page, the user can search for a service / specialty to view a list of consult orders in the current facility for that service / specialty. Consults have a number of days in which they need to be processed. Alerts will appear for the consult items when they are close to the maximum number of days, when they have been on the list for the maximum number of days, or if they have been on the list longer than the maximum number of days.

The user can select a consult from the list to view the details and the patient information related to that consult on the right. The user can select Print Consult when viewing consult details to generate a pdf of the consult details.

Veteran Requests Page !

The screenshot shows the VA Health Veteran Requests Page. At the top right, it displays patient information: Last ONE First PATIENT, DOB Apr 07, 1935, Age 80, Gender MALE, SSN 666-00-0001. Below this is a header bar with 'Veteran Requests' and a menu icon. The main area has two sections: a list of appointment requests on the left and a detailed view for a selected patient on the right.

Left Section: Appointment Requests

- Buttons:** Refresh, Restore Default Sort Order.
- Filter:** Filter the Veteran Requests results.
- Table Headers:** Alerts, Patient Name, Facility, Type, Status, Last Activity.
- Data:**

Patient Name	Facility	Type	Status	Last Activity
patient01, zztest	TEST VAMC 3	Primary Care	Submitted	11/03/2015 12:04:39
patient01, zztest	TEST VAMC 3	Primary Care	Booked	11/03/2015 12:04:39
one, patient	TEST VAMC 3	Primary Care	Booked	11/04/2015 11:16:33
one, patient	TEST VAMC 3	Mental Health	Cancelled	11/04/2015 11:16:33
one, patient	TEST VAMC 3	Primary Care	Not Booked	11/04/2015 11:16:33
one, patient	TEST VAMC 3	Primary Care	Submitted	11/04/2015 11:16:33
one, patient	TEST VAMC 3	Mental Health	Submitted	11/04/2015 11:16:33

Right Section: Patient Details

- Title:** patient one
- Information:** When in process, this request will be locked for other users. Process Request button.
- Note:** 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
- Send button:**
- From Veteran:** Office closed due to weather.
- From Staff:**
- Status Buttons:** Current Status, Submitted.

Figure 27 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.

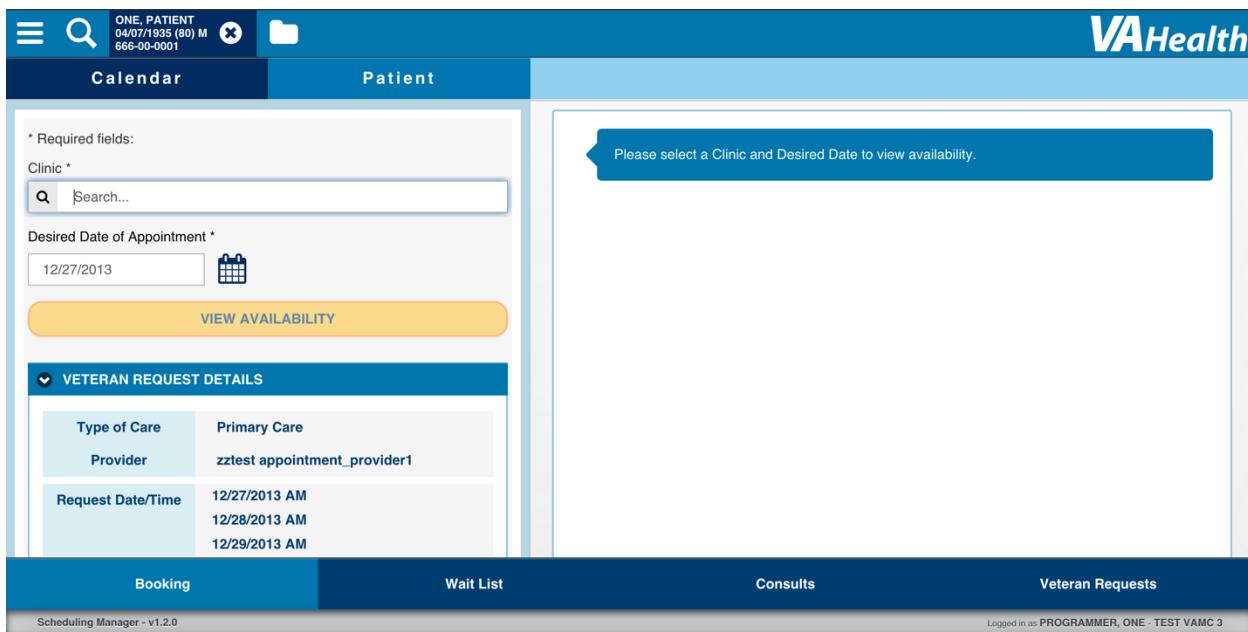


Figure 28 Veteran Request Details on the Booking Page

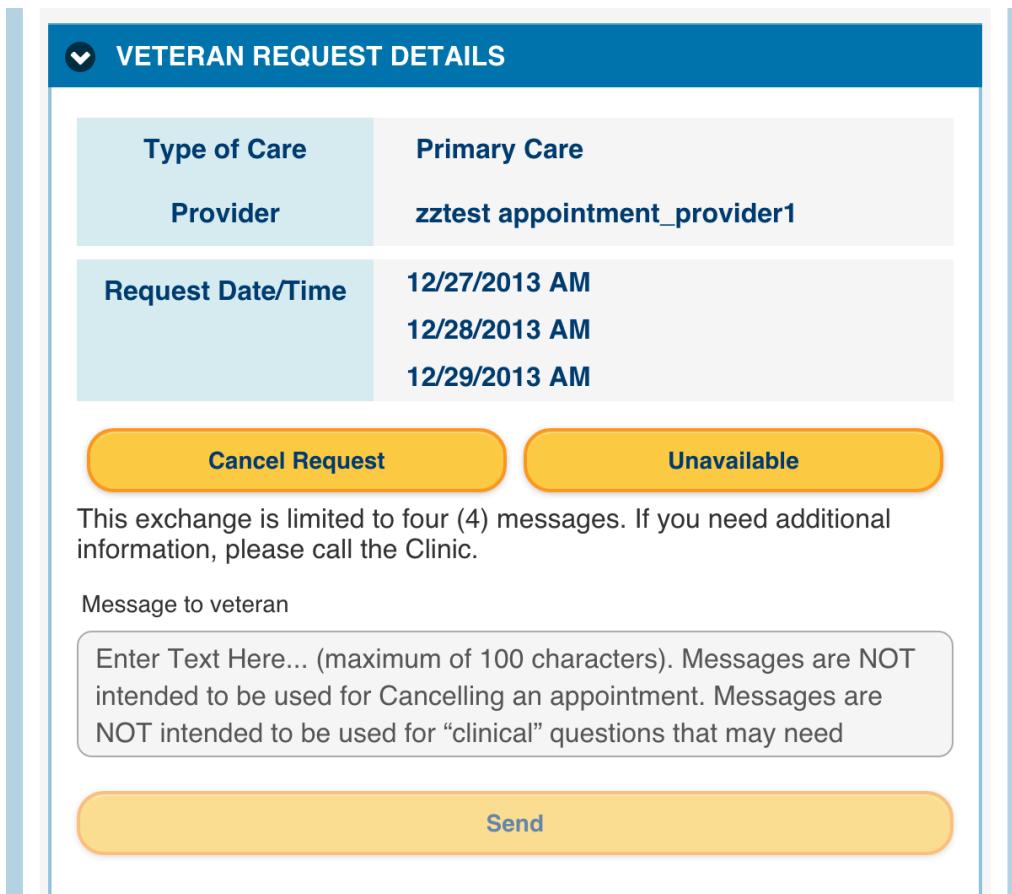


Figure 29 More of the Veteran Request Details Collapsible

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.

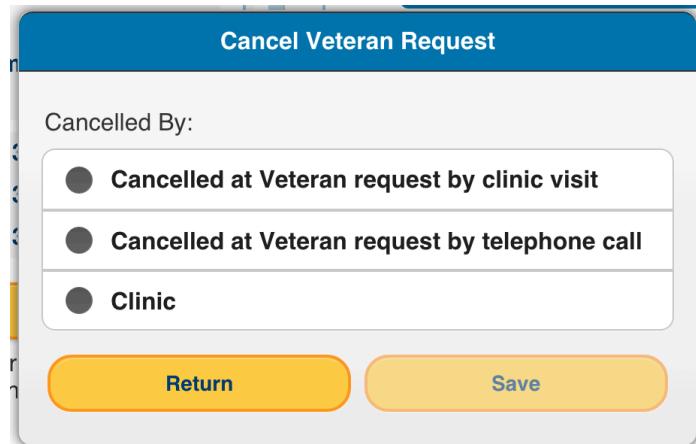


Figure 30 Cancel Request Popup

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.

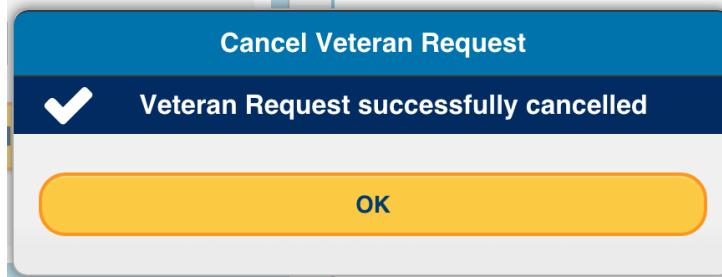


Figure 31 Cancel Veteran Request Success Message

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.

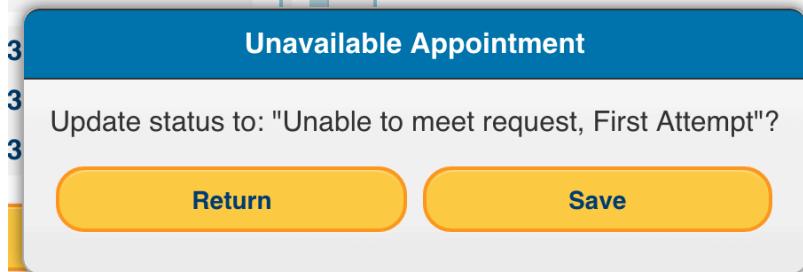


Figure 32 Unavailable Appointment Popup

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.

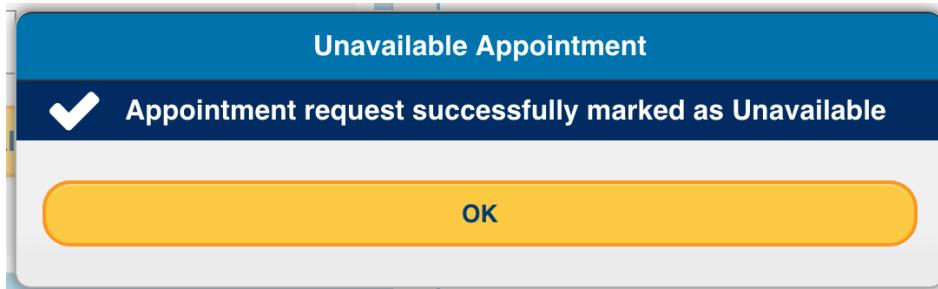


Figure 33 Unavailable Appointment Success Message

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.

 Book Appointment

Patient Details	Appointment Details
ONE, PATIENT	CARDIOLOGY
04/07/1935 (80) - MALE	11/06/2015
SSN 666-00-0001	08:00 - 08:30 - 30 mins

Fulfils the Following Veteran Request:

Type of Care	Primary Care
Provider	zztest appointment_provider1
Request Date/Time *	<input checked="" type="radio"/> 12/27/2013 AM <input type="radio"/> 12/28/2013 AM <input type="radio"/> 12/29/2013 AM <input type="radio"/> Booked from alternate after contacting patient <input type="radio"/> Booked from alternate

Figure 34 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.