**Use Case Requirements – Appointment List**

**Preconditions**

1. User must be logged in.
2. User must have ‘Admin’, ‘AppointmentAdmin’, or ‘AppointmentUser’ role.

**Basic Flow**

1. The user enters a SSN, ‘Last,First’, or A1234(Last initial + last four SSN) in to the text box.
2. The user clicks the ‘Find’ button.
3. The system populates the grid based on the above search criteria.
4. The user clicks on a name from the grid list.
5. The system loads ‘Patient Appointments without Letters’.
   1. These are the appointments as they exist in the VISTA system.
   2. By default the grid only displays appointments beyond todays date.
      1. This can be changed by modifying the ‘Begin/End Date’ textboxes and clicking the ‘Filter’ button.
         1. Setting only a begin date will filter for dates greater than the entered date.
         2. Setting only an end date will filter for dates less than the entered date.
         3. Setting a begin and an end date will filter within that range.
         4. Clicking the ‘Reset’ button will remove the date filter entirely and show all appointments regardless of date.
   3. By default the grid only displays appointments that haven’t been added to any existing letters.
      1. This can be changed by checking the ‘Show Appointments with Letters’. This will show all appointments regardless of whether they have already been added to an existing letter.
   4. The grid columns are:
      1. Date
      2. Time
      3. Clinic
      4. Current Status
      5. Type
6. The system loads ‘Patient Appointments with Letters’.
   1. These are groups of appointments that have appointment letters associated with them.
   2. By default the grid only displays groups where the begin date is greater than or equal to today’s date.
      1. This can be changed by checking the ‘Show Past Appointments’ checkbox. The system will then display all appointments with letters to the user.
   3. The grid columns are:
      1. Group ID
      2. Begin Date
         1. The earliest appointment in the group.
      3. End Date
         1. The latest appointment in the group.
      4. Date Sent
         1. The date the appointment letter was printed, released, or emailed to the patient.
   4. The user can also click the nested view icon “>” and the system will display a grid of the appointments associated with that letter.
      1. The grid columns are:
         1. Date
         2. Time
         3. Clinic
         4. Current Status
         5. Type

**Alternate Flow(s)**

*Create Letter*

1. The user wishes to create a letter for a group of appointments.
2. The user clicks the checkbox in the ‘Patient Appointments without Letters’ grid for all the appointments they wish to create a letter group for.
3. The user clicks the ‘Create Letter’ button.
4. The system pops up a message informing the user ‘Letter group ## has been created’.
5. The user clicks the ‘OK’ button.
6. The system refreshes the ‘Patient Appointments with Letters’ grid.

*Select Another Patient*

1. The user wishes to view appointments for a different user.
2. The user clicks the ‘Appointment List’ link at the top of the page.
3. The system displays the user search form.

*View Letter for Appointment Group*

1. The user wishes to edit/view the letter for an appointment group.
2. The user clicks the corresponding ID link button in the ‘Patient Appointments with Letters’ grid.
3. The system redirects the user to the ‘Appointment Details’ page.

*Filtering*

1. The user can filter the record list either by entering text in the top of the column.
2. The system filters the records and reloads the list.

*Sorting*

1. The user can click the column title to sort by any column listed.
2. The system resorts the records and reloads the list.

**Post Conditions**

1. The ‘AppointmentGroup’ table may be inserted.
2. The ‘Appointment’ table may be inserted.