

MOBILE VA HEALTH

Scheduling Manager v 1.0.0
User Guide 17 March, 2014



2014

DEPARTMENT OF VETERANS AFFAIRS

Table of Contents

1 General Information	4
1.1 Application Overview	4
1.2 Organization of User Guide.....	4
2 Application Summary	4
2.1 Configuration	4
2.2 User Access Levels.....	5
2.3 Workflow	5
3 Getting Started.....	5
3.1 Accessing the Launchpad and Scheduling Manager	5
3.2 Components of the Launchpad.....	6
3.3 Starting Scheduling Manager	6
4.0 Using Scheduling Manager.....	7
4.1 Scheduling Manager Home Screen	7
4.2 Booking an Appointment	7
4.2.1 Viewing Available Time Slots	8
4.2.2 Calendar Week View	9
4.2.3 Calendar Day View	10
4.3 Booking an Appointment	12
4.4 Patient Tab	14
4.4.1 Future Appointments.....	15
4.4.1.2 Canceling an Appointment.....	16
4.4.2 Waitlist	16
4.4.3 Consult Orders	17
4.5 Facility Wait List	19
4.5.1 EWL (Electronic Waitlist).....	20
4.5.2 NEAR.....	21
4.5.3 Recall	22
4.6 Facility Consults	22
4.7 Veteran Requests.....	23
4.7.1 Process Request.....	26

Table of Figures

Figure 1 Workflow.....	5
Figure 2 Staff LaunchPad	6
Figure 3 Login screen	6
Figure 4 Scheduling Manager home screen.....	7
Figure 5 Month view	8
Figure 6 Week view.....	10
Figure 7 Day view, available appointment slots	11
Figure 8 Book appointment	12
Figure 9 Confirmation screen.....	13
Figure 10 Time slot blocked out.....	14
Figure 11 Patient specific functions.....	14
Figure 12 Future appointment details	15
Figure 13 Cancel appointment.....	16
Figure 14 Waitlist (EWL, NEAR, Recall)	17
Figure 15 Patient Consults	18
Figure 16 Facility Wait List (EWL, NEAR, Recall)	19
Figure 17 Facility EWL and details.....	20
Figure 18 Facility NEAR list and details	21
Figure 19 Facility Recall list	22
Figure 20 Facility Consults.....	23
Figure 21 Veteran Requests.....	24

1 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, Electronic Wait List (EWL) as well as New Enrollee and Recall appointment requests.

1.1 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

1.2 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.

2 Application Summary

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

2.1 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.

2.2 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.

2.3 Workflow

The workflow below is a high level summarization of the Scheduling Manager functionality.

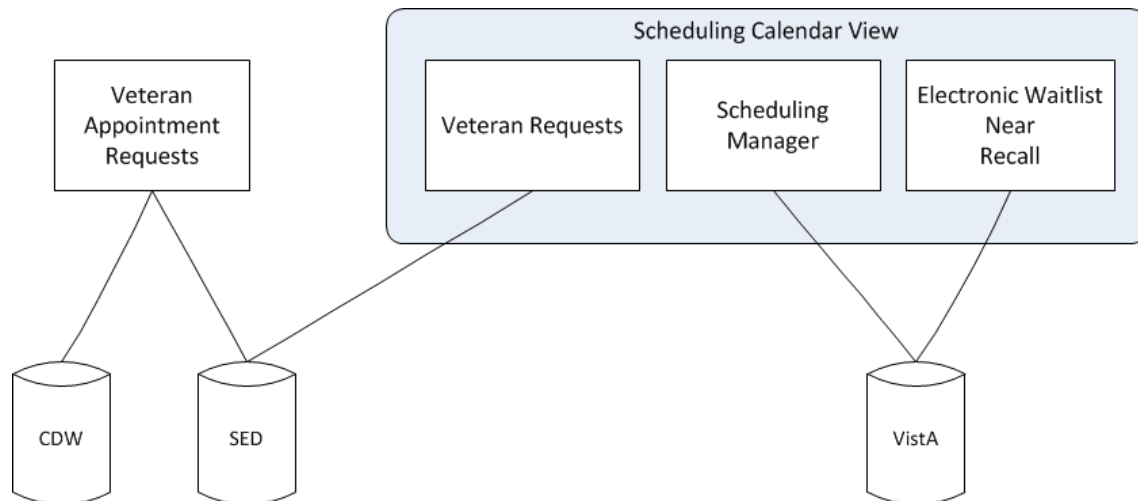


Figure 1 Workflow

3 Getting Started

This Section describes the Launchpad and logging into Scheduling Manager.

3.1 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. The URL for the launch pad is:

<https://hastaffdemo.agilexhealth.com/launchpad/>

3.2 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.

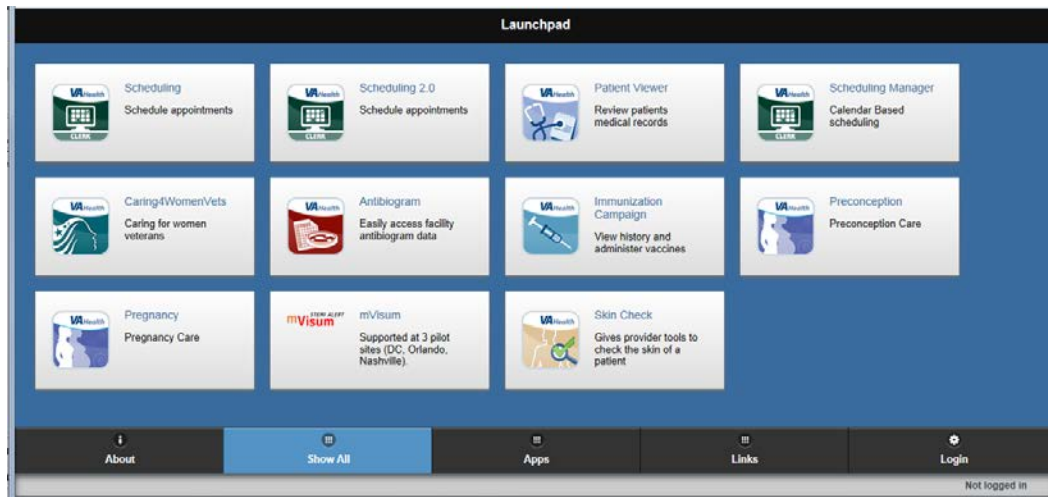


Figure 2 Staff LaunchPad

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 users 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.

3.3 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.

The screenshot shows the VA Department of Veterans Affairs Provider Login screen. At the top, there is a blue header with the Department of Veterans Affairs logo and the text "Department of Veterans Affairs PROVIDER LOGIN". Below the header, there are three input fields: "Access Code", "Verify Code", and "Station". Each field has a magnifying glass icon on the left. Below the input fields, there are two buttons: "Clear" and "Sign In".

Figure 3 Login screen

Logging in requires the user to enter their DS login ID, password and the VA medical facility they are authorized to access.

4.0 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, a type of 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.

4.1 Scheduling Manager Home Screen

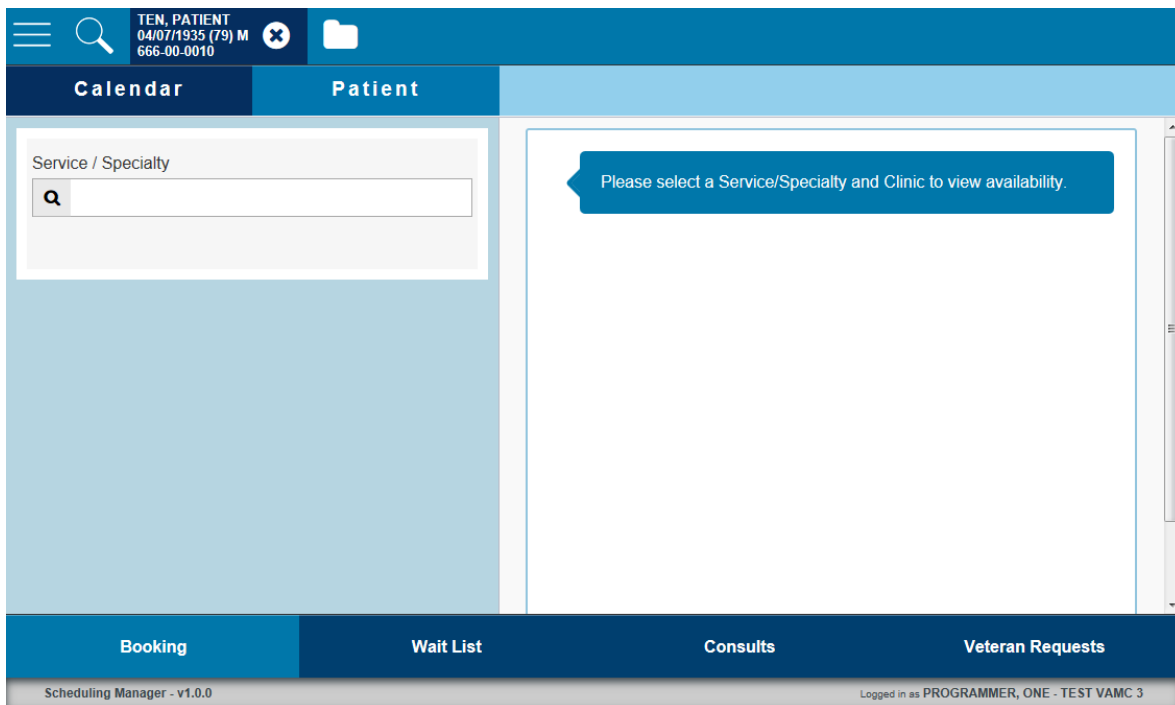


Figure 4 Scheduling Manager home screen

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

- Booking – The clerk can view the availability of a clinic and book or cancel appointments.
- Waitlist – Manages the Electronic Wait List, NEAR and Recall lists of the facility that was chosen at login.
- Consults – View consults by specialty.
- Veteran Requests – Secure messaging with Veterans about scheduling appointments

4.2 Booking an Appointment

Booking is used to book appointments and the manage waitlist entries of the Veteran the clerk has chosen to work with. There are three views of the booking calendar; month, week and day. The different views are provided to help the Clerk identify available time slots and existing appointments. Appointments can only be booked on the day view.

4.2.1 Viewing Available Time Slots

Prior to viewing the calendar and booking an appointment the following must be selected; the specialty, between one and five clinics associated with the specialty, and a patient. There must also be a Veteran requested appointment date. When all of these are supplied a calendar for the current month will be displayed.

The Veteran appointment desired date will be displayed if a patient was selected from the waitlist or the Veteran Request. When these appointment requests are created the desired date is entered or one is generated by default. If the Veteran calls a clerk to schedule an appointment the date does not exist in the system and the clerk must enter one.

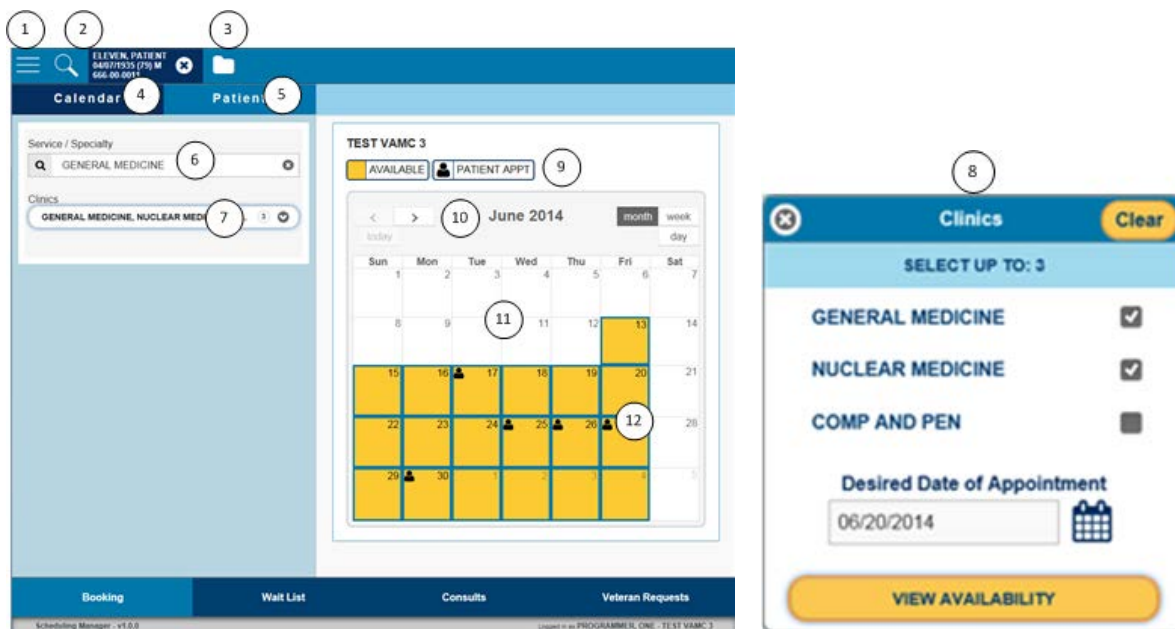


Figure 5 Month view

Item	Description
1	Additional functions. This will let the clerk see information about the application, navigate back to the Launchpad and logout.
2	Patient Search. By default the last Veteran that was in use will be in context. A different patient can be placed in context by typing selecting the magnifying glass and typing the first or last name and/or a patient's social security number.
3	Patient contact information, displays phone number, email address and other contact information if it is available.
4	Calendar Button. The calendar is the default view when the Booking screen is opened. The calendar is used to view a clinic's available time slots and book appointment into them.
5	Patient Button. Changes Schedule Manager to a Veteran centric view. The patient view tab displays a Veteran's future appointments, wait list, NEAR, and Recall items and consult orders.

6	Service/ Specialty search. As the Clerk types the matching entries will be displayed, the Clerk can select the correct one.
7	Clinic search. When the Service is selected the Clinic search will be displayed. Up to five clinics that are associated the Service/Specialty can be included for display in the scheduling calendar. The clerk can enter text in the search box or select the expand button to open a popup of all the available clinics
8	Clinic Selection Popup. The Clerk can select the clinics to be included in the calendar view. - Clear Button. Clears the check boxes - Counter. Counts down from 5 as clinics are selected - Clinic selection. Any clinic that is checked will be included in the booking process. - View Availability Button. At least one clinic must be chosen for this button to become active. When all of the desired clinics are selected, the Clerk selects this button to display the month calendar view.
9	Month view Calendar Legend. Identifies the shading and icons used on the calendar.
10	Calendar Navigation - Prior and Next month arrows. - Month, Week, Day, and Today buttons. Month displays the current calendar month. Week displays the calendar week, and Day the day for the current date. Today returns to the month view of the current date - Selecting any day on the calendar will display that day. These navigation buttons are date sensitive. Appointments cannot be scheduled in the past and past dates cannot be displayed. If the current month is February the navigation keys will not allow January to be displayed. Navigation keys are greyed out if their use would navigate into the past.
11	Month View Calendar. Shows availability and booked appointments. Appointments cannot be booked from this view. The Month view does not show any differentiation between clinics. The view will show that the patient has an appointment scheduled on a day but not which clinic it is in. When a day is shown as having availability at least one, but not necessarily all clinics have available time slots.
12	Existing appointment icon. This indicates that the selected patient has an appointment on that day.

4.2.2 Calendar Week View

The week view shows the days and hours that the clinics are available for scheduling. A separate shading pattern is identified in the legend for each clinic.

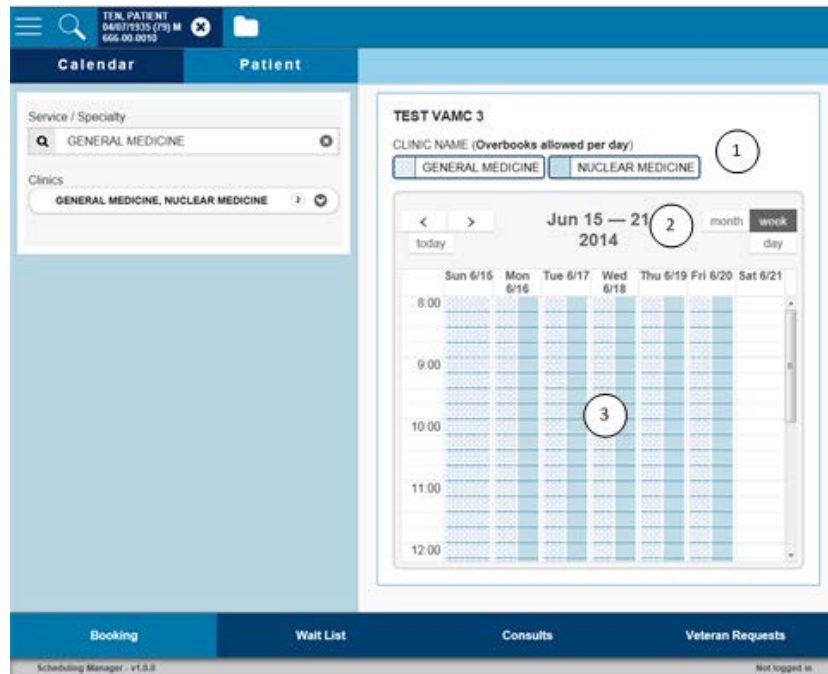


Figure 6 Week view

Item	Description
1	Week View legend. Identifies the shading and icons used in the calendar
2	Calendar Navigation <ul style="list-style-type: none"> - Prior and Next Week arrows. Shows the prior and next week. Past weeks cannot be displayed - Month, Week, Day, and Today buttons. Month displays the current calendar month. Week displays the calendar week, and Day the day for the current date. Today returns to the week view of the current date - Selecting any day on the calendar will display that day.
3	Week View calendar. Displays a week at a time. This provides more detail than the month view. Appointments cannot be booked from this view.

4.2.3 Calendar Day View

The Day view is used to initiate booking an appointment. The legend in the primary header has the clinics and shading along with the number of appointments that can be overbooked for each clinic. These are the total overbooks allowed in a day, they are not tied to a specific time slot. A column is displayed for each clinic. This view is used to book appointments

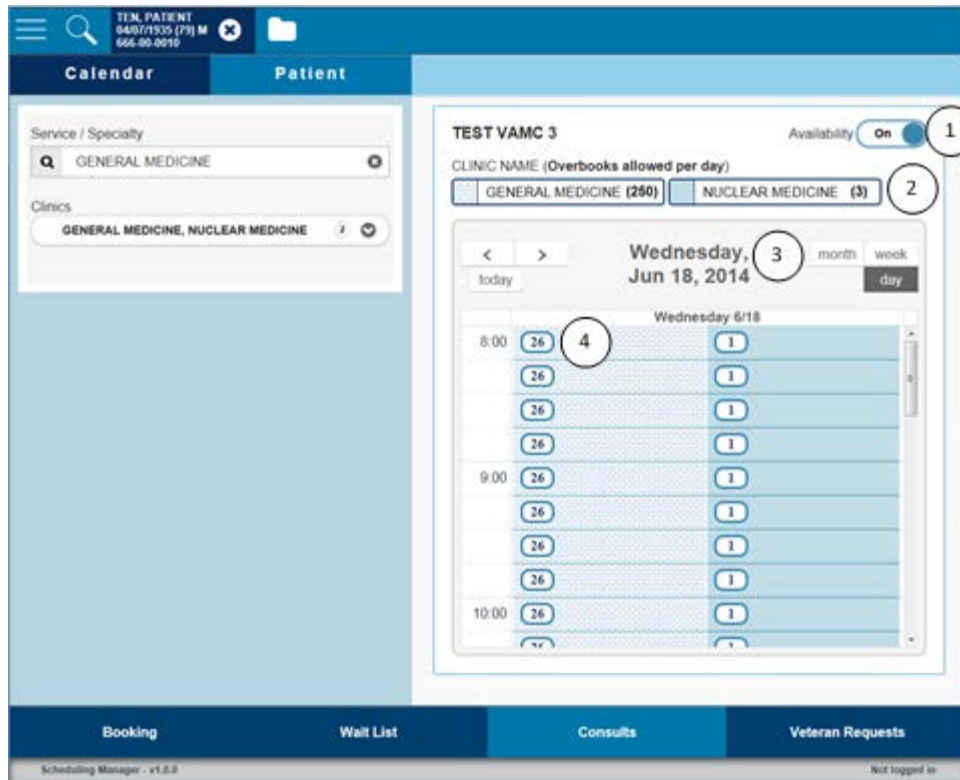


Figure 7 Day view, available appointment slots

Item	Description
1	View availability toggle. This turns viewing the booking/overbooking numbers on and off
2	Day view legend. Identifies the shading and icons used in the calendar. Each clinic will be shaded in a different pattern.
3	Calendar Navigation <ul style="list-style-type: none"> - Prior and Next day arrows. Shows the prior and next days. Past days cannot be displayed - Month, Week, Day, Today. Month displays the current calendar month. Week displays the calendar week, and Day the day for the current date. Today returns to the day view of the current date
4	Available appointments or number of overbooks per time slot Each time slot has a number or character in it which is the number of appointments available or the number of existing overbooked appoints in that slot. The number of available appointments will decrement each time an appointment is made until the available number reaches zero. If a time slot is overbooked the number will be replaced with a letter. "A" equals one overbook in a slot, B is 2, C is 3 etc. A special character in a slot indicates that the slot is not normally available for appointments but has been booked using an overbooking key. An asterisk (*) indicates 1 appointment overbooked, a dollar sign (\$) indicates 2 appointments overbooked, an exclamation point (!) indicates 3 appointments overbooked, an "at" sign (@) indicates 4 appointments overbooked. The Clerk's DS login determines if they have the ability of overbook or not.

4.3 Booking an Appointment

Clicking in an available time slot on the Day view opens the Book Appointment screen

The clerk must select the purpose of the visit and the appointment type. Both of these are drop down selections. The Book Appointment button will not become active until the Purpose and Type are selected. An optional note can be entered. When the appointment is booked a confirmation screen is displayed.

The screenshot shows the 'Book Appointment' form with the following elements and numbered callouts:

- 1**: Patient Details section containing 'ELEVEN, PATIENT', '04/07/1935 (79) - MALE', and 'SSN 666-00-0011'.
- 2**: Appointment Details section containing 'GENERAL MEDICINE', '06/26/2014', and '08:15 - 08:30 - 15 mins'.
- 3**: Purpose dropdown menu currently showing 'COMPENSATION & PENSION'.
- 4**: Appointment Type dropdown menu currently showing 'Walk-in'.
- 5**: Notes (Optional) text area containing 'Acute need'.
- 6**: Cancel button.
- 7**: Book Appointment button.

Additional text on the form includes 'Please Complete the Following:' and 'Characters Remaining: 150'.

Figure 8 Book appointment

Item	Description
1	Patient Details. The patient's name, date of birth, gender and full SSN are displayed on the left hand side.
2	Appointment Details. The appointment details; clinic, date, time and duration of the appointment are shown on the right side.
3	Purpose. These values are the gotten from The Vista instance for the facility chosen at login.
4	Appointment Type. These values are the gotten from The Vista instance for the facility chosen at login. When the purpose and type are completed the Book appointment button becomes active.
5	Notes. Entering a short note about the appointment is optional.
6	Cancel Button. If the clerk determines that this is the incorrect patient or time slot they can select the "Cancel" button.
7	Book Appointment Button. This books the appointment into the timeslot and displays the confirmation screen

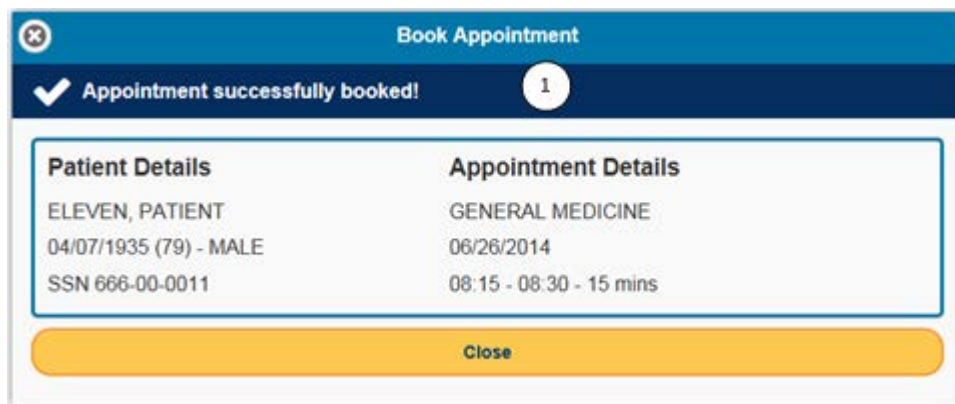


Figure 9 Confirmation screen

Item	Description
1	The confirmation message will change depending on how the appointment was booked. If the clerk booked the appointment by processing a veteran request the message would contain information about whether the appointment was booked during a phone call and if it was on the requested date.

The Day view is displayed when the confirmation screen is closed. The booked time slot is now blocked out across all of the selected clinics for this patient. This prevents double booking a time slot for an individual Veteran.

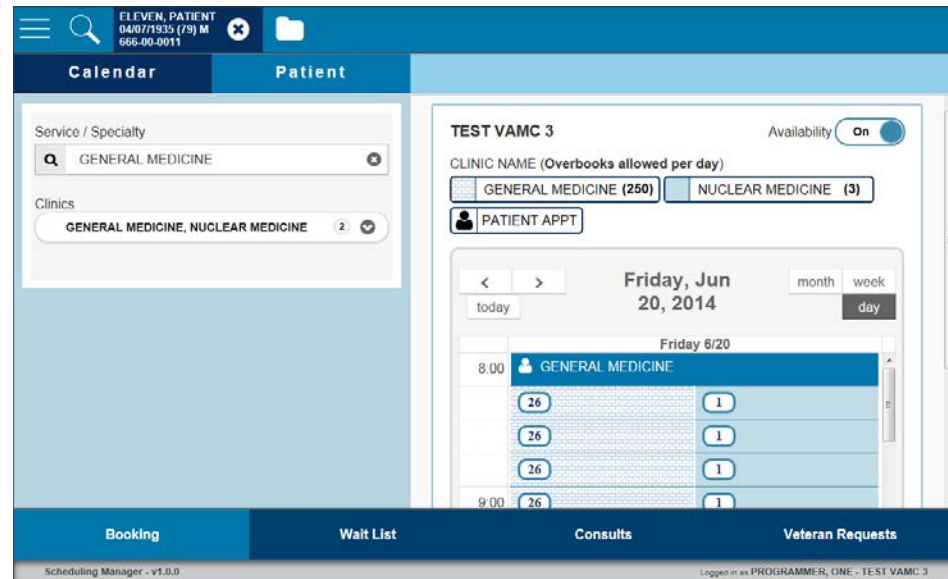


Figure 10 Time slot blocked out

4.4 Patient Tab

From the Patient tab the clerk can view a Veteran's future appointments, manage waitlisted requests and view consults for the patient that is selected.

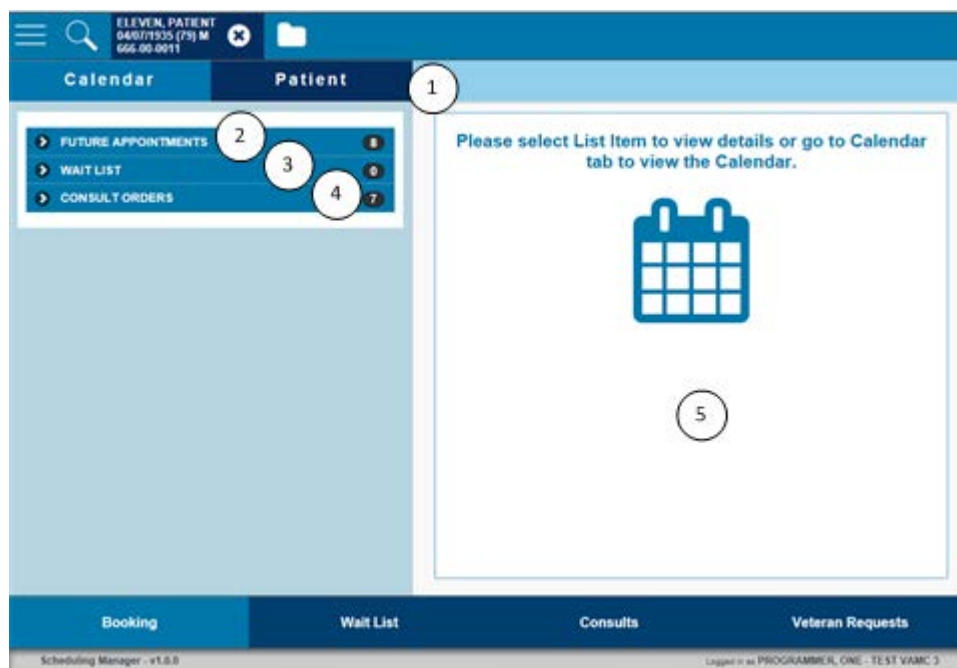


Figure 11 Patient specific functions

Item	Patient
1	Patient button selected
2	Future Appointments. This will list all appointments for the patient. A future appointment is one that is scheduled any time after the current time and date. The number of future appoints scheduled for the patient is shown
3	Waitlist. These are requests or pending appointments. The combined number of waitlist items from the EWL, NEAR and Recall lists for the patient is shown
4	Consult orders. Displays a list of consults. The number of consults orders for the patient is shown
5	Waitlist Detail. This side of the screen remains blank until an item is chosen from a list on the left side.

4.4.1 Future Appointments

Clicking in the Future appointments row opens the list of scheduled appointments. Selecting an appointment opens its details on the right pane of the screen.

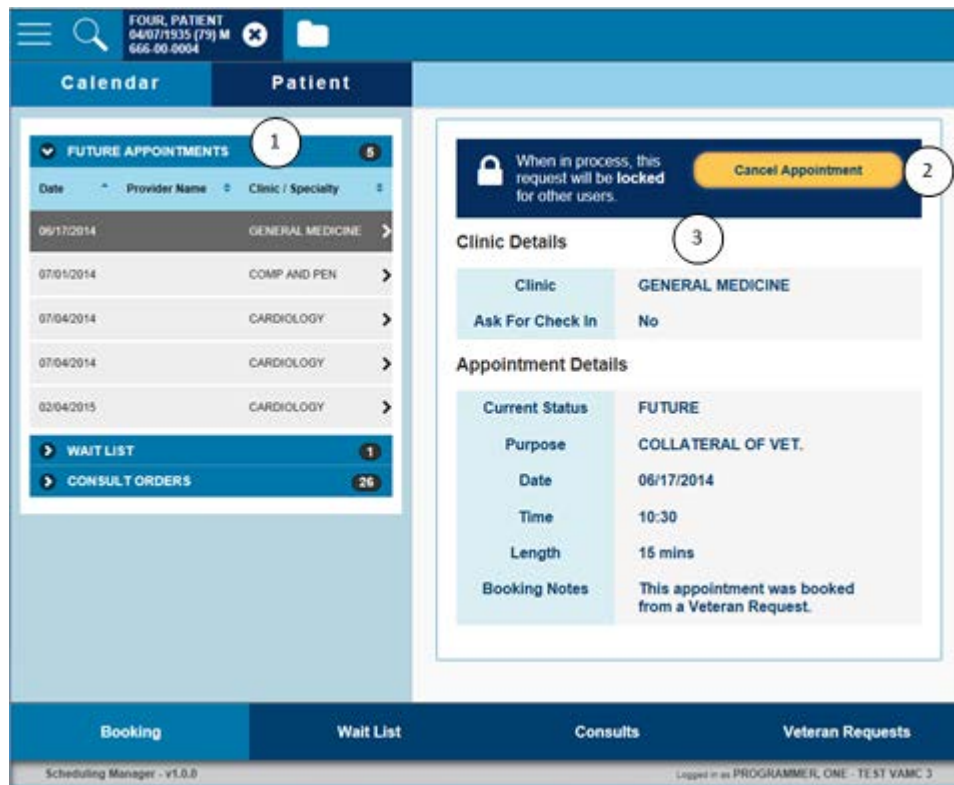


Figure 12 Future appointment details

Item	Description
1	List of future appointments. The appointments can be sorted by any of the column headers
2	Cancel Appointment button.
3	Future Appointment detail information.

4.4.1.2 Canceling an Appointment

Selecting the Cancel Appointment button opens the Cancel detail screen. The patient and appointment detail are displayed in the header. The clerk must enter the status and reason for cancellation. An optional note can also be entered. When the status and reason are entered the Cancel Appointment button becomes active. If the clerk does not wish to cancel this appointment they can click on the Do Not Cancel button.

×

Cancel Appointment

Patient Details

TEN, PATIENT

04/07/1935 (78) - MALE

SSN 666-00-0010

Appointment Details

GENERAL MEDICINE

03/25/2014

08:00 - 08:15 - 15 mins

Please Complete the Following:

Status

Cancelled by Patient

Reason

DEATH IN FAMILY

Characters Remaining: 200

Notes (Optional)

Do Not Cancel Appointment

Cancel Appointment

Figure 13 Cancel appointment

4.4.2 Waitlist

Waitlist is used to book appointments from existing requests that are on either the electronic wait list, NEAR or Recall lists. Four columns are displayed; the Source list (type of request), the clinic/specialty, days on the list and the desired date of the appointment. The list can be sorted by any of these columns. Selecting any item from the list will open the booking screen.

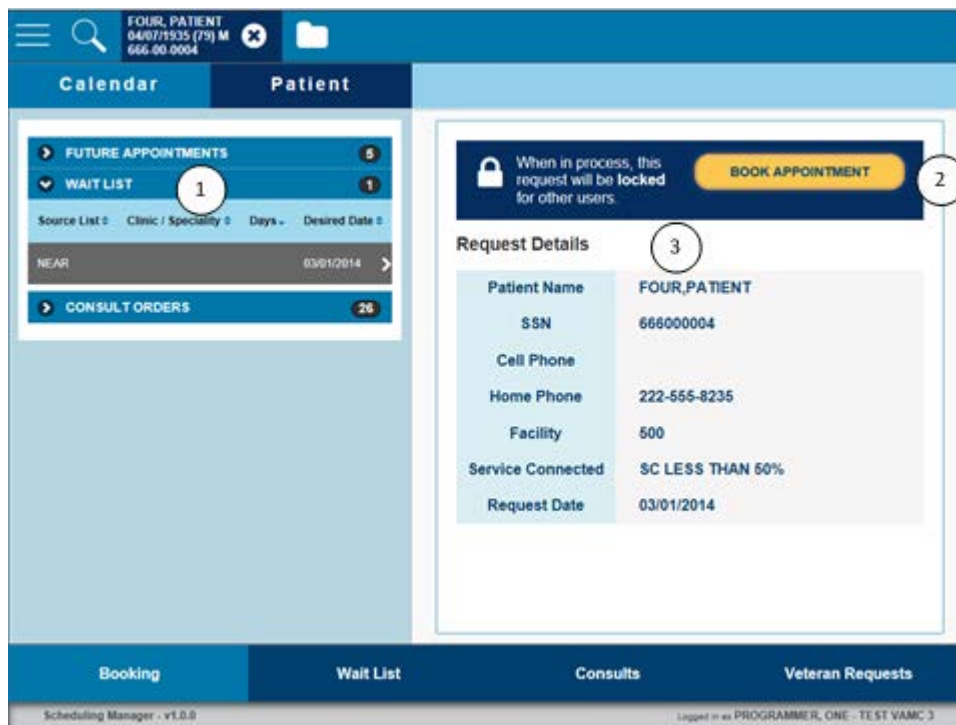


Figure 14 Waitlist (EWL, NEAR, Recall)

Item	Description
1	Wait List items. Each item is labeled as being on the EWL, Near or Recall list. The list can be sorted by any of the column headers.
2	Book Appointment. When the clerk selects and reviews a wait list item they can book an appointment. This will go to the booking screen and retain information from the selected item.
3	Details about the selected item. Appropriate information will be displayed for each type of item, EWL, NEAR and Recall.

4.4.3 Consult Orders

Consult orders are listed with the Service/Specialty, Order Date and the number of days it has been on the list. The background color for the number of days on the list changes based on the number of days past the order date, 4 to 7, 8 to 34, or 35 to 37. Moussing over the days will also display this range. Selecting a consult will display it on the right hand pane. The order can also be printed.

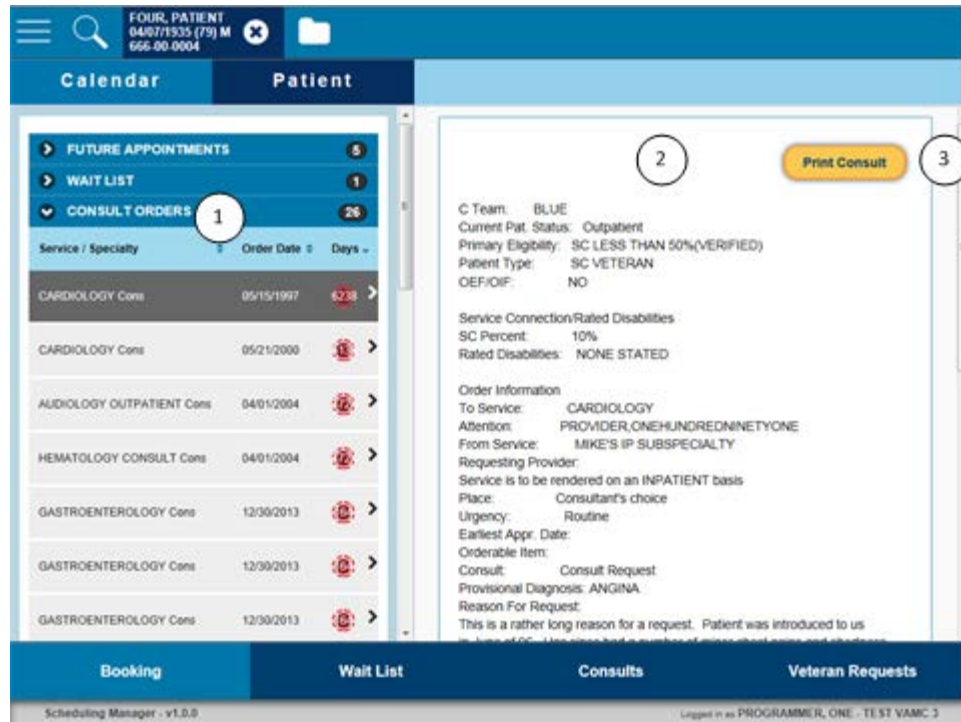


Figure 15 Patient Consults

Item	Description
1	List of consults for the patient. The list can be sorted by any of the column headers. The background color for the number of days on the list changes based on the number of days past the order date; 4 to 7, 8 to 34, or 35 to 37
2	Shows the details for the selected consult
3	Print Consult

4.5 Facility Wait List

Wait List manages the Electronic Waitlist, NEAR and Recall lists from a facility perspective. A header for each type of list is displayed followed by the number of entries on the list. Selecting a header opens the list. Only one list can be open at a time.

Each type of list will display its own set of detail information. However from each of the types appointments can be booked. When an item is selected the details will be shown in the right hand side of the screen. There will also be a Book Appointment button. This will go to the booking screen and retain the patient information and request details.

When a patient is selected their information is displayed in the upper right hand corner. This allows the clerk to confirm that the correct patient is displayed.

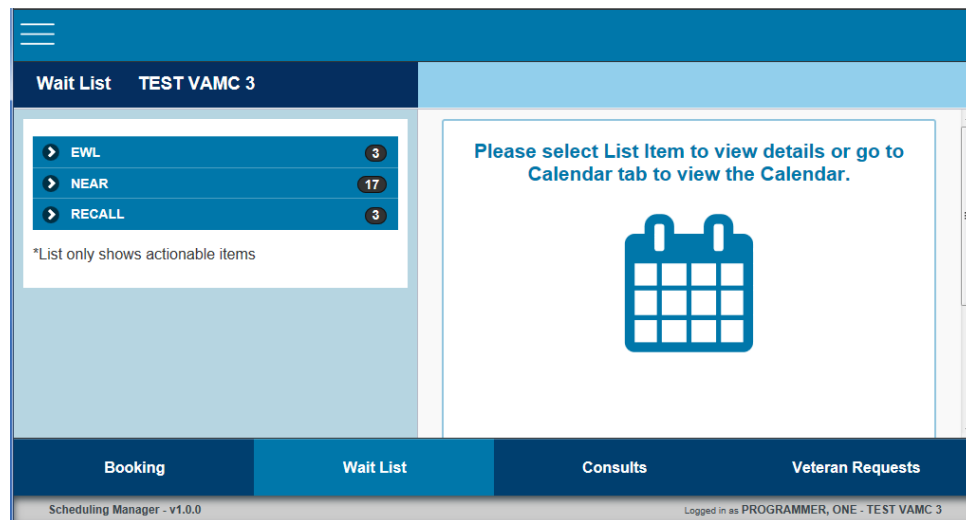


Figure 16 Facility Wait List (EWL, NEAR, Recall)

4.5.1 EWL (Electronic Waitlist)

Opening the EWL displays a list of all patients who are on the EWL. The patient name, percent service connected (specific to the appointment request type) and the number of days on the list. The list can be sorted by any of these columns. Selecting a patient places that patient in context and displays the appointment request details. The Clerk can select the Book Appointment button to begin the booking process.

The screenshot displays the 'Wait List' interface for 'TEST VAMC 3'. The top navigation bar includes 'Wait List' and 'TEST VAMC 3'. The main content area is divided into two panels. The left panel, titled 'EWL', shows a table of patients with columns for 'Patient', 'Service Connected', and 'Days on List'. The table lists three patients: 'SEVENTYEIGHT,INPATIENT' (50+, 98 days), 'SEVENTYEIGHT,INPATIENT' (50+, 94 days), and 'FOURHUNDREDEIGHT,PATIENT' (NC, 247 days). Below the table are navigation buttons (First, Prev, 1, Next, Last) and a status 'Showing 1 - 3 of 3'. The right panel, titled 'Request Details', shows a 'BOOK APPOINTMENT' button and a warning: 'When in process, this request will be locked for other users.' Below this is an 'Overview' section with 'Clinic' and 'Stop Code'. The 'Request Details' section lists: 'Desired Date of Appointment' (03/28/2014), 'Originating Date' (03/07/2014), 'Days on EWL' (98), 'Service Connected' (50+), 'Priority' (ASAP), and 'Last Updated' (03/07/2014). The 'Patient Details' section shows 'Patient Name' (SEVENTYEIGHT,INPATIENT). The bottom navigation bar includes 'Booking', 'Wait List', 'Consults', and 'Veteran Requests'. The footer shows 'Scheduling Manager - v1.0.0' and 'Logged in as PROGRAMMER, ONE - TEST VAMC 3'.

Patient	Service Connected	Days on List
SEVENTYEIGHT,INPATIENT	50 +	98
SEVENTYEIGHT,INPATIENT	50 +	94
FOURHUNDREDEIGHT,PATIENT	NC	247

Request Details	Value
Desired Date of Appointment	03/28/2014
Originating Date	03/07/2014
Days on EWL	98
Service Connected	50 +
Priority	ASAP
Last Updated	03/07/2014

Patient Details	Value
Patient Name	SEVENTYEIGHT,INPATIENT

Figure 17 Facility EWL and details

4.5.2 NEAR

Selecting NEAR opens the list of all new enrollees who have requested an appointment or who have defaulted to an appointment date. The names of the Veterans, degree of service connectedness and the appointment request date are displayed in columns. The list can be sorted by any of these criteria. Selecting a Veteran opens the request details. The Clerk can use the Book Appointment button to begin booking an appointment.

Wait ListTEST VAMC 3

Last THREE First PATIENT
DOB Apr 07, 1935 Age 79 Gender MALE
SSN 666-00-0003

When in process, this request will be locked for other users.

BOOK APPOINTMENT

Request Details

Patient NameTHREE,PATIENT

SSN666000003

Cell Phone

Home Phone222-555-8235

Facility500

Service ConnectedSC LESS THAN 50%

Request Date03/01/2014

EWL3

NEAR17

Patient	Service Connected	Request Date
ONE,INPATIENT	NC	11/16/201
GRAPHINGPATIENT,ONE	NC	11/21/201
TWO,PATIENT	50 -	03/01/201
THREE,PATIENT	50 -	03/01/201
FOUR,PATIENT	50 -	03/01/201
FIVE,PATIENT	50 -	03/01/201
SIX,PATIENT	50 -	03/01/201
SEVEN,PATIENT	50 -	03/01/201
EIGHT,PATIENT	50 -	03/01/201
TEN,PATIENT	50 -	03/01/201
ZZZRETFOURFORTYNINE,PATIENT	NC	03/06/201

Booking

Wait List

Consults

Veteran Requests

Scheduling Manager - v1.0.0

Logged in as PROGRAMMER, ONE - TEST VAMC 3

Figure 18 Facility NEAR list and details

4.5.3 Recall

Selecting Recall displays a list of all patients who have recalls. The list contains the patients' names, clinic the recall is for and the recall date. Selecting a patient displays the recall details. The Book Appointment button can be used to book the recall.

Wait List TEST VAMC 3

Last **THREE** First **PATIENT**
DOB **Apr 07, 1935** Age **79** Gender **MALE**
SSN **666-00-0003**

EWL 3
NEAR 17
RECALL 3

Patient	Clinic	Recall Date
BCMA.EIGHTEEN-PATIENT	CARDIOLOGY	05/26/2013
BCMA.EIGHTYSEVEN-PATIENT	CARDIOLOGY	01/18/2014
BCMA.EIGHTYFOUR-PATIENT	CARDIOLOGY	02/10/2014

First Prev 1 Next Last Showing 1 - 3 of 3

*List only shows actionable items

Please select List Item to view details or go to Calendar tab to view the Calendar.

Booking Wait List Consults Veteran Requests

Scheduling Manager - v1.0.0 Logged in as PROGRAMMER, ONE - TEST VAMC 3

Figure 19 Facility Recall list

4.6 Facility Consults

Prior to displaying consults a Service/Specialty must be chosen. The search box will auto complete a user's entry. If the wrong specialty is chosen or the use wants to work with a different specialty the X icon can be used to clear the specialty and its associated list.

The list of consults displays the patient name, status of the consult, order date and the number of days it has been on the list. The background color for the number of days on the list changes based on the number of days past the order date, 4 to 7, 8 to 34, or 35 to 37. Moussing over the days will also display this range. Selecting a consult will display the details in the right hand pane. The clerk can print the consult from the detail screen.

Consults

Service / Specialty: GASTROENTEROLOGY

1

Patient Name	Status	Order Date	Day
NINETYFIVE,OUTPATIENT	PENDING	12/24/2013	170
NINETYFIVE,OUTPATIENT	PENDING	12/24/2013	170
NINETYFIVE,OUTPATIENT	PENDING	12/24/2013	170
NINETYFIVE,OUTPATIENT	PENDING	12/24/2013	170
NINETYFIVE,OUTPATIENT	PENDING	12/24/2013	170
NINETYFIVE,OUTPATIENT	PENDING	12/24/2013	170
NINETYFIVE,OUTPATIENT	PENDING	12/24/2013	170
NINETYFIVE,OUTPATIENT	PENDING	12/24/2013	170
NINETYFIVE,OUTPATIENT	PENDING	12/24/2013	170

2

Last NINETYFIVE, First OUTPATIENT
DOB Mar 03, 1945 Age 69 Gender MALE
SSN 666-00-6695

3

Print Consult 4

Current Pat. Status: Outpatient
Patient Type: NSC VETERAN
CEF/CIF: NO

Order Information
To Service: GASTROENTEROLOGY
From Service: GENERAL MEDICINE
Requesting Provider: PROGRAMMER,ONE
Service is to be rendered on an OUTPATIENT basis
Place: Consultant's choice
Urgency: Routine
Earliest Appr. Date: Dec 24, 2013
Orderable item: GASTROENTEROLOGY
Consult: Consult Request
Reason For Request: creating a bunch of consults for Hitesh to test pagination

Inter-facility Information
This is not an inter-facility consult request.

Status: PENDING
Last Action: CPRS RELEASED ORDER

Facility Activity Date/Time/Zone Responsible Person Entered By
CPRS RELEASED ORDER 12/24/13 14:07 PROGRAMMER,ONE
PROGRAMMER,ONE

Note: TIME ZONE is local if not indicated

Booking Wait List Consults Veteran Requests

Scheduling Manager - v1.0.0

Logged in as PROGRAMMER, ONE - TEST VAMC 3

Figure 20 Facility Consults

Item	Description
1	List of consults for the patient. The list can be sorted by any of the column headers. The background color for the number of days on the list changes based on the number of days past the order date; 4 to 7, 8 to 34, or 35 to 37
2	Shows the patient identifying information
3	Consult details
4	Consult print button

4.7 Veteran Requests

The Veteran Requests allows limited messaging between a Veteran and the Scheduling Clerk. The Veteran uses the VAR (Veteran Appointment Request) application to fill out an appointment request form and include short message with it. The Clerk can respond to the message and manage the request as appropriate. From the VAR the Veteran can request that a clerk call so that the appointment can be scheduled during a phone call.

The main Veteran Requests screen displays a list of all VAR generated requests from Veterans. To narrow the list the Clerk can search for any text that appears in the columns. If the clerk wanted to work

only on submitted requests they could type "submitted" and press enter. A clinic or patient name could also be entered. To clear a search the Clerk can click on the X icon and the full list is displayed. The list has Alerts, Patient Name, Facility, Type, Status and Last Activity (a date) listed. The list can be sorted by any of these. To reset to the default order the Clerk can select the Restore Default Sort Order button. There is also a refresh button to redisplay the list with the current search criteria.

Selecting an appointment request displays the request details on the right pane.

The dialog between the Veteran and Booking staff will be shown with the ability to create another message. The status of the request will determine the actions the Clerk can take. Statuses are; submitted, booked, cancelled and not booked. Additional details shown are Veteran demographics and contact information, requested facility, type of care, visit type, purpose of the visit and requested date and time for the appointment.

If the request status is submitted the Clerk can select the Process Request button. This starts the booking process. The request can be booked as an appointment, canceled or marked as unavailable. When the request status is booked the request can be canceled, which does not cancel the appointment. The appoint needs to be canceled from the Future Appointments screen. When the status is Not Booked or Canceled the clerk can continue the dialog with the Veteran but no further action can be taken on the request.

Veteran Requests

1 Last ELEVEN First PATIENT
DOB Apr 07, 1902 Age 79 Gender MALE
SSN 666-00-0011

2 Refresh 3 Restore Default Sort Order

4

Alerts	Patient Name	Facility	Type	Status	Last Activity
	ELEVEN, PATIENT	TEST VAMC 3	Mental Health	Submitted	06/12/2014 21:31:19
	FOUR, PATIENT	TEST VAMC 3	Mental Health	Booked	06/11/2014 08:17:25
	ELEVEN, PATIENT	TEST VAMC 3	Primary Care	Booked	06/10/2014 15:23:37
	ONE, PATIENT	TEST VAMC 3	Mental Health	Booked	06/10/2014 13:15:42
	ONE, PATIENT	TEST VAMC 3	Mental Health	Cancelled	06/10/2014 12:47:13
5	ONE, PATIENT	TEST VAMC 3	Primary Care	Booked	06/10/2014 12:47:13
	ONE, PATIENT	TEST VAMC 3	Primary Care	Not Booked	06/10/2014 12:47:13
	FOUR, PATIENT	TEST VAMC 3	Primary Care	Not Booked	06/02/2014 09:08:41

PATIENT ELEVEN

When in process, this request will be locked for other users. 6 Process Request

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

Message to veteran

7

Send

From Veteran: 8 06/12/2014 21:34

From Staff:

9

Current Status Submitted

Full Name PATIENT ELEVEN

Date of Birth Jan 01, 1902

Booking Wait List Consults Veteran Requests

Scheduling Manager - v1.0.0 Logged in as PROGRAMMER, ONE - TEST VAMC 3

Figure 21 Veteran Requests

Item	Description
1	Patient identifying information. This is displayed only after a request is chosen
2	Refresh. Refreshes the display, if necessary, after of requests have been processed. Any filter that has been applied is used during the refresh.
3	Restore Default Sort Order. The default order is by Last Activity, oldest to newest.
4	Search Box. Used to filter the requests on the screen. The search is performed only on the text displayed in the list e.g. name or status, not on specific message content or other information contained in the request. The search is case sensitive.
5	Alert Icon. This indicated a new message or other activity by the Veteran.
6	Process request, opens the booking screen.
7	Message box. A reply can be typed and sent the Veteran
8	Prior messages
9	<p>This pane contains:</p> <ul style="list-style-type: none"> Appointment request details Status of the Request Request Details If the Veteran has requested a call Patient Contact information

4.7.1 Process Request

When processing, or booking, an appointment request a service/specialty, clinic and request date need to be supplied. In addition the request details are displayed.

The screenshot displays the 'Patient' tab of a scheduling application. At the top, a header bar shows 'ELEVON PATIENT' and contact information. Below this, the 'Calendar' and 'Patient' tabs are visible. The 'Patient' tab contains a 'Service / Specialty' search bar (1) and a 'VETERAN REQUEST DETAILS' section (3). This section includes a warning icon and text 'Patient has requested a phone call: 1112223333', followed by fields for 'Type of Care' (Mental Health), 'Provider' (Provider that I want to see is not listed), and 'Request Date/Time' (06/25/2014 AM, No Date Selected, No Date Selected). Below these are buttons for 'Cancel Request' (4) and 'Unavailable' (5). A message input field (6) is at the bottom of the details section. To the right of the details section is a large empty area (2) for the calendar. The bottom navigation bar includes 'Booking', 'Wait List', 'Consults', and 'Veteran Requests'. The footer shows 'Scheduling Manager - v1.0.0' and 'Logged in as PROGRAMMER, ONE - TEST VAMC 3'.

Item	Description
1	Service/Specialty selection. Completing this will open the clinic selection popup. The desired appointment date will be filled in front eh request.
2	The calendar will display in this area
3	Request details entered by the Veteran
4	Cancel Request button. Cancels the request, this can be used if the Veteran requests, by phone or messaging, to cancel the request.
5	Unavailable. Used if the requested date was unavailable and no other suitable date could be agreed upon.
6	Message pane. Allows the clerk to send a message to the vet, who can read it using the VAR package.