

# **VistA Scheduling Enhancements (VSE) Release 1.1**

## **Release Notes**



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**Version 1.2**

**Department of Veterans Affairs**

**Office of Information and Technology (OI&T)**

## Revision History

Date	Revision	Description	Author
1/27/2017	1.2	Updates to address VA comments	D. Vick L. Masucci E. Phelps
1/18/2017	1.1	Updates for Additional Enhancements Release 1.1	D. Vick E. Phelps M. Woehrle L. Masucci
4/17/2016	1.0	Initial submission	M. Woehrle

## Table of Contents

<b>1. Introduction</b> .....	<b>1</b>
<b>1.1 Purpose</b> .....	<b>1</b>
<b>1.2 Audience</b> .....	<b>1</b>
<b>2. This Release</b> .....	<b>1</b>
<b>3. Features and Functionality</b> .....	<b>1</b>
<b>4. User Documentation</b> .....	<b>11</b>
<b>5. Known Issues</b> .....	<b>11</b>

# 1. Introduction

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

## 1.1 Purpose

The purpose of this document is to provide a summary of the enhancements and defect corrections that make up the VistA Scheduling (VS) Graphical User Interface (GUI) Release 1.1. The Release 1.1 software package is comprised of the following:

- VS GUI application v2.0.0.5 and VistA M patches GMRC\*3.0\*83, SD\*5.3\*642, SD\*5.3\*643, SD\*5.3\*645, SD\*5.3\*627, SD\*5.3\*628 which were approved for National Release on 4/29/16 and Released on 5/3/2016 with the constraint that patches would ONLY be installed in the test environment.
- VS GUI application v2.0.0.8 and VistA M patches GMRC\*3.0\*86, SD\*5.3\*651, and SD\*5.3\*658, MBAA\*1\*4

Note: GUI v2.0.0.8 and associated patches are expected to be nationally released with a compliance date of 5 May 2017.

## 1.2 Audience

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

## 2. This Release

The following sections provide, in brief, the new features and defect corrections implemented by the VistA Scheduling Enhancements (VSE) project.

## 3. Features and Functionality

The following features are included in the VS GUI v 2.0.0.8 and VistA M patches GMRC\*3.0\*83, SD\*5.3\*627, SD\*5.3\*628, SD\*5.3\*643, SD\*5.3\*642 , SD\*5.3\*645, SD\*5.3\*651, SD\*5.3\*658, MBAA\*1\*4:

**Enhancement 1:** Veterans Health Administration (VHA) requires an aggregated (combined) view of clinic profile scheduling grids to allow the user to view the resource's availability collectively and decrease the time it takes to match an available resource with the patient's request and improve the appointment scheduling process. Enhancement 1 provides an aggregated view of clinic profile scheduling grids for VistA Scheduling to include:

- A standard tool for viewing and scheduling aggregated resources in order to improve performance for appointment scheduling
- Improved visibility into resources across clinic profiles
- Exposes previously underutilized resources
- Improves business processes and efficiency

**Enhancement 2:** This enhancement consolidates information from multiple appointment request sources so all patient requests are available collectively to be queried, filtered, and sorted to improve the appointment scheduling process. The single queue of request lists for appointment requests provides immediate, incremental relief to the field, including:

- Promotes a standard tool for consolidating, viewing, sorting and prioritizing appointment requests in order to improve performance for appointment scheduling
- Improves the business' ability to accurately prioritize patient appointment needs regardless of method of request and work list
- Improves business processes and efficiency by streamlining the process and removing duplication
- Eliminates waste in a Scheduler's workload processes related to appointment requests

**New Service Request (NSR) #002:**

- The aggregated request list functionality built into the VS GUI must be separated from the wait list file structure in VistA.
- Assigning of schedulers to clinics must be done on an exclusionary instead of the current inclusionary basis.
- The current capability to link multiple appointments to a single appointment request must be replaced by a one-to-one linkage (one appointment request per appointment).
- The aggregated request list functionality built into the VS GUI will only display Wait Lists associated with Clinics whose clinic profiles allow such display.
- In multiple return to clinic scenarios (multi-book appointments), VS GUI calculation of subsequent Desired Dates based on initial Appointment Booking Date rather than initial Desired Date.

**Veteran Appointment Request (VAR) Interface:** Provides an interface between the VS GUI and the VAR appointment request database, including:

- Link an appointment requested in VAR and processed in VistA such that the state of the appointment in VistA (e.g. cancelled, checked out) can be displayed in the VS GUI application
- View appointment requests within VS GUI
- Communicate or message the Veteran from within VS GUI up to a limit of four times
- Close out requests from VS GUI

**Optional Task #3 (OT3):** Three enhancements to the VS GUI have been identified by VHA to support the Scheduling workflow and policy:

- Appointments generated from Consults in CPRS shall use the Consult **Earliest Appropriate Date** to populate the **DESIRED/RECALL DATE** and **ENTERED/RR NO DATE** fields in the VS GUI when a value is present other than **Today's** date (as set as default by CPRS) and is not equal to the Appointment Entered Date.
- Remove functionality in Legacy VistA Scheduling and VS GUI that provided the ability to hide appointment requests associated with Wait Lists associated with Clinics
- Veteran Disabilities will be displayed in the VS GUI to aid in determining eligibility for specific clinics

**Optional Task #4 (OT4) Functionality** consists of additional enhancements identified by VHA to support the Scheduling workflow and policy:

- The VSE GUI shall follow the same rules as in VistA for Overbooking and Master Overbooking Security keys.
- The VSE GUI shall display number of available appointment slots in the calendar view for the clinic within each appointment time slot to allow booking of several appointments.
- The VSE GUI shall have a consistent color visual indication for the following:
  - Hours of operation.
  - Non-workable hours during that specific day (after hours bookable using a key).
  - No appointment can ever be booked.
  - Clinic inactive.
  - Holiday but bookable.
  - Holiday but NOT bookable.
  - No availability created for the clinic.
- The VSE GUI shall allow entering variable length appointments only for clinics with variable appointment lengths defined in the VistA Clinic Setup Parameters.
- The VSE GUI shall display a visual indicator for clinics that allow variable appointment lengths.

- The VSE GUI shall display special clinic instructions on the screen e.g. “only make new appointments on Tuesday and Thursday”.
- The VSE GUI shall NOT shall display Occasion of Service Clinics (OOS) - (field 50.01 = yes is the OOS indicator) including drop down lists.
- The VSE GUI shall display message "No availability was created for the clinic" when a grid does not exist for the clinic (example: VCL and admin clinics) similar to current VistA Scheduling processing.
- The VSE GUI shall allow for entering 'CID/Preferred Date' and/or appointment date within the appointment requests using past dates.
- Multi-book Enhancement GUI.
- For inpatients, the VSE GUI shall display ward location in patient demographic area for each patient.
- Comp & Pension Appointments need to be linked to the 2507 Request as it currently does in VistA.
- Multi-Appointment Booking Wait Time.
- Scheduling ‘Desired Date’ Change.
- Recall Reminder Parameters.
- Recall Reminder Print Failures.
- Modification to VistA Recall Reminders.

**Enhancement 3:** Enhancement 3 provides a consolidated view of resource management metrics related to scheduling supply and demand, for appropriate organizational components (e.g., clinic, facility levels). The tool is referred to as Resource Management Reporting. The enhancement provides aggregate views of Legacy VistA Scheduling data and does not directly contain Personally Identifiable Information (PII) data.

The following features and defect corrections are included in the VS GUI v 2.0.0.8 and VistA M patches GMRC\*3.0\*86, SD\*5.3\*651, and SD\*5.3\*658:

**VSE Additional Enhancements (Release 1.1):** This group of enhancements provides the following modifications and defect corrections to the VS GUI application:

- **Grid Match and Unscheduled Appointments** – For VSE Schedulers who schedule a series of appointments for a Veteran. The solution provides the scheduler with the ability to schedule appointments at times and with the variations needed to support clinic operation, as well as identifying the exact appointment times for unscheduled patients/walk-ins. That helps provide greater flexibility in scheduling Veterans. Unlike the current system that does not offer flexibility needed, this process increases availability and provides better tracking information.
  - VS GUI will display the calendar grid based on the information contained in the clinic profile, including clinic hours of operation, appointment lengths, number of

- appointments available, etc. (1.1a) (This does not mean that the data has to be pulled directly from the clinic profile in VistA but the information has to be the same.)
- VS GUI calendar display will show appointment time slots of varying lengths in a single day, starting at any time during the day (not just on the hour, half hour or quarter hour)
  - Ability to make unscheduled appointments at the time the patient presents (arrives) in the clinic – exact time, not at an available time already on the calendar (1.2a).
- **Edit and View Requests** – For VSE Schedulers who schedule appointments in VSE. The solution will allow schedulers to manage requests more efficiently and effectively by editing requests, saving and viewing all comments, and reopening requests as needed, while always preserving the original preferred date (PD). That helps the scheduler make appointments for Veterans without having to create a new request and ensures that Veterans receive care when needed. Unlike the current system that will not allow the scheduler to edit some critical request information and will not reopen requests for no show and canceled by patient appointments. Our process will allow schedulers to more effectively view and edit requests, which will improve the accuracy and efficiency of the scheduling process.
    - Edit Requests – Ability to edit currently non-editable fields in the Request, except for the Service code (stop code), via the EDIT REQUEST functionality in the RM grid. The fields that can be edited include: Appointment Type, ALL Special Needs and Preferences, “Requested By” and Comments.
    - Reopen Requests for appointments marked as no show and for appointments canceled by patient.
  - **Demographic Data Updates** – For VSE Schedulers who schedule appointments within VS GUI. The solution allows the scheduler to update information in VS GUI and the correct information will be updated in VistA. That helps the scheduler better serve the Veteran by making updates more efficiently and while making an appointment for the Veteran. Unlike the current system that forces the scheduler to move back and forth between VS GUI and VistA, reducing the likelihood that schedulers will want to use VS GUI and increasing the time to make changes. Our process would reduce the time the scheduler would need to update important Veteran demographic information because the scheduler can update the Veteran’s demographic information while making appointments and without having to use the VistA system.
    - Ability to update currently displayed demographic information from VS GUI. All demographic information available in the VistA pre-registration menu can be updated while in VS GUI without needing to use VistA. Those updates will be immediately reflected in VistA. Incorrect input (such as letters in a phone number field) is rejected with an appropriate error message and has a recovery path (based on VA [508 standards](#)).



- The demographic information that can be updated in VS GUI includes the following fields that are being displayed in the “Patient Information” block on the VSE GUI “Appointment Request” screen and during the initial creation of the “Appointment Request”:
  - A. Address (Street Address Line 1)
  - B. City
  - C. State
  - D. Zip Code
  - E. Country
  - F. Phone (residence)
  - G. Phone (work)
  - H. Bad Address
- Ability to display and update demographic information (3.1b) that is not currently displayed in VS GUI when in either “EDIT REQUEST” or “APPOINTMENT REQUEST.”
- In addition to the demographic information currently displayed in VS GUI, the following fields that are editable in VistA will be displayed and editable in VS GUI :
  - A. Street Address Line 2
  - B. County
  - C. Ethnicity
  - D. Race
  - E. Marital Status
  - F. Religious Preference
  - G. Temporary Address
  - H. Phone Number [Cellular]
  - I. Pager Number
  - J. Email Address
- In addition to the demographic information listed above, the following field will be displayed, but not editable, in VS GUI: Gender.
- Display correct patient address information. The solution will display the correct address for a Veteran. Currently, in the New Appointment dialog window on the Contact Information tab, the Veteran’s address is displayed incorrectly. The street address is from the Veteran’s demographic information in VistA but the city and state are from the next of kin information.
- Display all national patient flags associated with a patient in VS GUI.
- **CCOW and Patient Identification** – For VSE Schedulers who schedule appointments in VSE. The solution will synchronize the patient information across functional areas within VSE to the patient in focus and provide more information about a patient’s identification in the calendar view of appointments. That helps the scheduler search for and view patient appointments more efficiently and consistently. Unlike the current process where

the scheduler has to search on the patient in each application, independently, and does not have enough information for identifying appointments in the calendar. Our process will allow schedulers to more effectively manage appointments.

- Synchronize the Patient in Focus in one application with the patient searched/rendered in the other application (excluding the query tool results), e.g., when a patient is pulled up in VS GUI (patient data being displayed in the GUI) and the scheduler opens Computerized Patient Record System (CPRS), the same patient that is displayed in GUI will be automatically pulled up in CPRS. Also, when a patient is pulled up in Legacy VistA Scheduling, and the scheduler opens VS GUI, the same patient will be automatically displayed in VS GUI.
- Provide more information than the patients initials associated with the patient's appointment in the calendar view. As a scheduler rolls (i.e., hovers) the mouse over a patient's initials in the calendar view, the pop-up that currently displays the patient's name will also include the last 4 of the patient's social security number.
- **Improved Printing** – For VSE Schedulers, providers, and patients who need to print or read printed schedules and scheduling letters (clinic cancellation, appointment cancellation, no-show, and pre-appointment). The solution enables improved printing of letters and printing of Veteran appointments. That provides printing of letters with visually effective formatting, no loss of information, and provides printing of appointments for Veterans unlike the current VSE system that has issues printing all types of letters and schedules. Our process would improve the processes related to printing in VSE.
  - Facilities can print reminder letters (clinic cancellation, appointment cancellation, no-show, and pre-appointment) that are legible and all content is on the page. Set the default font to 12 point versus 15 point; if the scheduler changes the font size due to facility-specific needs, save the new setting so the scheduler does not have to change the font size for each print job. A scheduler can view the letter on the screen prior to printing. The solution will result in legible letters with the correct number of lines between the address and the first line, prevents the content from running off the page, paginates correctly (if needed) includes all the correct appointment information.
- **Trash Queue Clean Up** – For administrators who need to identify and purge unresolved requests. The solution will allow a task to be run to identify open appointment requests or duplicate appointment requests and close them, producing a report for administrators. **Note:** Excludes VAR requests which are called Veteran Request or Mobile and Welcome to VA (W2VA) requests – all stored in the SDEC APPT Request file. That helps the administrator by rectifying unresolved requests automatically. Unlike the current process where there are duplicate requests and unresolved requests that must be resolved by the administrator. Our process will save schedulers and administrators time but still allow them to review closed duplicates and open requests.

- **Set User Preferences and View Only (Usability)** – For VSE Schedulers who need to create and view Veteran, appointment, and clinic information in VSE. The solution will allow the user to set their default view preferences and will add a view only option. That helps to improve scheduler efficiency unlike the current VSE system that does not provide these features. Our process would improve the processes used by schedulers and improve overall service to the Veteran.
  - Remove the “Patient” label on the “Request Type” window. This will leave only APPT and RECALL.
  - Like to Have: Save Request Column/Filter preferences for users, which includes scheduler changes to the order of the columns in the RM grid and/or changes to filters in the appointment request grid. Default preferences can be saved by the user so that each time they logon to the VS GUI, the view will be their default view. For example, on the first main screen with the master facility request listing, there can be a “Set Preferences” button at the top of the screen that will allow the scheduler to select the column order and any filters and set their preferences. In addition, the patient request list will have the same column order as the saved configuration but not the filters.
  - View Only option: The solution will provide a VIEW ONLY option for all VSE screens such that the users can view information but not modify any information. This will be automatically set for users with limited permissions. When someone with limited privileges launches the VS GUI, their view will be defaulted to a View Only mode and a “banner” will show stating it is view only (similar to VistA imaging). The user can search on and view by patient, clinic, provider. This will eliminate the need to provide scheduler training to approximately 25K providers. Currently, to obtain security key assignment in VistA, training is required but the training requirement would not apply to a view only option.
  
- **VAR Queue** –For VSE Schedulers who schedule appointments in VSE the solution will display the telephone number that was entered into the VAR screen by the Veteran in the VAR queue that helps to ensure the scheduler will be contacting the Veteran at the number they have provided. Unlike the current process where the phone number entered into VAR does not display in VSE. Our process will allow schedulers to more efficiently and effectively contact Patients for appointments.
  - Display all information available in a request entered via VAR, including the Veteran-provided phone number (this is a preferred contact number for the Veteran; preferred contact times are already pulled into VS GUI).
  - Missing appointment information in VAR for VSE booked appointments shall be corrected. Status of not booked will be provided to VAR when appointment in VSE is marked as such.
  
- **Performance** – For all VSE users who view, schedule, or manage information in VSE the solution will provide efficient and effective response time, displaying pick lists, query

results, and reports real time and without performance issues such as white screens or a seemingly endless hourglass. That helps to ensure the scheduler will be able to serve Veterans efficiently and effectively, maintaining good productivity. Unlike the current process that pulls up limited data, takes too long to pull up data, or results in white screens. VSE will display pick lists in five (5) seconds or less. VSE will inform user of progress during the generation of queries. Our process will allow schedulers to more efficiently and effectively perform their jobs.

- Improved response time so that pick lists are accurate, complete, and timely (13.1).
- The Query Tool issue. The only drop down issue is if you try to pull up a provider that does not have any clinics assigned then the GUI crashes.
- Improve functionality such that users will not get black or white screens.
- Notify user when system is processing so they do not start working on something else and slow the system down even more.
- Improved Query tool functionality such that the user will not get white screens and results for small queries are returned in less than 5 seconds.
- Like to Have: Turn off management reports – “board it up” until fixed (User Audit and Clinic reports are working).

**Defects Corrected:**

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

Ticket Number	Defect Description	Patch Number(s)
I10691629FY16	User can select a different patient from the calendar (PSPO 3242)	SD*5.3*658
I11142558FY17	Comments in VS GUI do not work properly; there are differences between VistA and VS GUI; includes NOTES & Comments that are in different fields in the GUI (PSPO 3306)	SD*5.3*658
I10665102FY16	Availability does not zero out	SD*5.3*658
I10320124FY16	Scheduling letters printed with the default font of 15 do not print the information correctly on the page.	SD*5.3*658
I10691629FY16	User can select a different patient from the calendar (PSPO 3242)	SD*5.3*658
I9982851FY16	VSE Grid displaying incorrect slot availability	SD*5.3*658
I10449686FY16	VS GUI displays too many slots for a 60min increment clinic	SD*5.3*658
R10131762FY16	VS GUI Not Prompting for Overbook	SD*5.3*658
I9871873FY16	ENH REQ APPROVED: VSE Calendar is not displaying the Overbook symbol beside the overbook appointment.	SD*5.3*658
I10659119FY16	The VS GUI RM GRID is not placing the Service Connected (SC) related appointment before the other appointments as requirements stated	SD*5.3*658
I10043597FY16	The length of the Special Needs and Preferences REMARKS field in VS GUI is causing unresponsive system.	SD*5.3*658
I10619212FY16	ENH REQ APPROVED: All Request in the VS Request Grid should open to TODAYs Date when the CID/PD Date is in the PAST	SD*5.3*658

<b>Ticket Number</b>	<b>Defect Description</b>	<b>Patch Number(s)</b>
I9937259FY16	Comments entered in the VS GUI APPT Request are not being displayed when the Request is Viewed and they are not transferring to the EWL Request.	SD*5.3*658
I10695144FY16	ENH REQ: New or Established field is not calculating according to Business Rules set by ACAP office.	SD*5.3*658
I11146466FY17	ENH REQ: VSE - Need the ability to make a scheduled appointment at a time that overlaps an already scheduled appointment. (ex - Tele-Health)	SD*5.3*658
I9883746FY16	MRTC not reflecting correct CID Date	SD*5.3*658
I9654231FY16	Multi-Appointment booking in VSE GUI - incorrect CID being passed to VistA	SD*5.3*658
I10573215FY16	ENH REQ APPROVED: Multiple Return To Clinic (MRTC) is allowing the clinic to be changed to a clinic that is not within the same stop code as the requested clinic	SD*5.3*658
I9883550FY16	If the user does not complete the steps when cancelling a MRTC appointment, the appt is not completely cancelled.	SD*5.3*658
I9642120FY16	During the process of Multi-Book appointment booking, the VS GUI hangs.	SD*5.3*658
I9829412FY16	ENH REQ Approved: MULTIPLE APPOINTMENT BOOKING-SDMULTIBOOK Option- Appts MADE in VistA Legacy are not reflected in VS GUI.	SD*5.3*658
I9956180FY16	Edits made to request comments in VS GUI do not get sent to VistA legacy.	SD*5.3*658
I9568671FY16	ENH REQ APPROVED: VS GUI should be updated to always show the CID Date found in the Consult	SD*5.3*658
I9381748FY16	VSE - Query for Recall results with black screen and application freezing.	SD*5.3*658
I9878547FY16	VSE keeps freezing at many points from log in to well within the program.	SD*5.3*658
I11145711FY17	ENH REQ: VSE - RM GRID - Consults are to be displayed in the RM Grid regardless of the request date	SD*5.3*658
I10612450FY16	UAT: Calendars in the Schedules Section do not sync together	SD*5.3*658
I10645706FY16	UAT: Month View in Schedules Section is not functioning properly	SD*5.3*658
I10659319FY16	VS GUI is not reflecting the SC Related field in the RM GRID correctly.	SD*5.3*658
I10644445FY16	UAT: Editing an Appt Request leaves Clinic/Service field blank	SD*5.3*658
I10371353FY16	Duplicate of I9651169FY16: Address in the New Appointment block under the Contact Tab is displaying the Next Of Kin - city, state, zip instead of patient address info	SD*5.3*658
I10046473FY16	Large Amount of Characters in Notes Section causes an error in VS GUI Appt Remarks after entering an Appt	SD*5.3*658
I9961448FY16	Entering a "^" when creating an appointment request in VS GUI causes a table error box and user cannot correct.	SD*5.3*658
I10644588FY16	UAT: Viewing EWL Request is not displaying Clinic/Service field	SD*5.3*658
I11611508FY17	VS GUI: Add application identifier to inform user if they are in Test or in Production.	SD*5.3*658
I12577233FY17	VS GUI v2008-IOC Prod: Comments between VistA and GUI are different.	SD*5.3*658
I12653472FY17	VS GUI v2008 - Cleveland Production - found a consult in cancelled status that is showing in GUI as a consult to be scheduled	SD*5.3*658
I11760785FY17	ENH REQ: VAR - appointments canceled by Veteran from the VA app are not being removed from the VSE Calendar display	MBAA*1*4

Ticket Number	Defect Description	Patch Number(s)
I10657865FY16	ENH REQ: VAR- Appointments That were Direct Patient Scheduled are not Being Displayed in VS GUI Except in the Pending Appointment Box.	MBAA*1*4

## 4. User Documentation

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

File Names	Description
VS_GUI_UG.PDF	VS GUI User Guide
GUI_TM.PDF	VS GUI Technical Manual
VSE_VS_GUI_IG_v10.PDF	VS GUI Installation Guide
VSE_Release_Notes.PDF	VSE Release 1.1 Release Notes

## 5. Known Issues

All known issues for this release are documented by CA SDM tickets as part of the ongoing Post Warranty Sustainment effort. Known issues are documented as Open items on the latest ticket list [here](#).