Virtual Care Manager

Version 2.19

User Guide

June 2023

U.S. Department of Veterans Affairs
Veterans Health Administration
Office of Connected Care

User Guide

Table of Contents

1. Overview

Virtual Care Manager (VCM) integrates telehealth and digital health solutions into the care of our Veterans. Capabilities in VCM include:

My Workspace:

- **Schedule:**
  - View all appointments (video, phone, in-person) by:
    - Authenticated user (default)
    - Other healthcare professional
    - VistA clinic(s)
  - Create, edit, and join video visits.
- **Image/Video Requests:** Request photos or videos from patients for review.
- **My VCM Notes:** Draft notes in VCM (which can be sent to CPRS).
- **Facility Contact Information:** View clinic-based telehealth emergency handoff procedure and contacts at all VHA healthcare facilities.
- **e911:** Enter patient location address to obtain a phone number to the local 911 services at the patient location.

Patient Care:

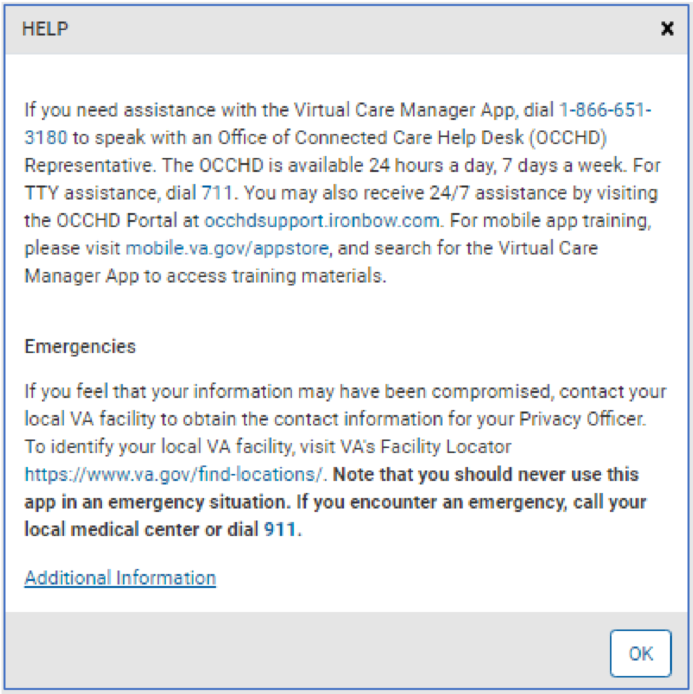
- **Appointments:** View all of a patient's appointments (video, phone, in-person). Create, edit, and join video visits.
- **Patient Data:** View vitals and labs, including any data submitted by patients from connected devices (Apple Watch, Fitbit) and apps.
- **Condition Graphs:** View patient data for weight and BMI, daily calorie balance, activity, sleep metrics, and daily heart rate.
- **Image/Video Requests:** Request patients submit photo or videos to providers.

Clinical Dashboards:

- Condition-specific dashboards utilize patient data from the VA's data warehouse and from patient-generated health data (PGHD) to offer insights, trends, and opportunities for intervention.

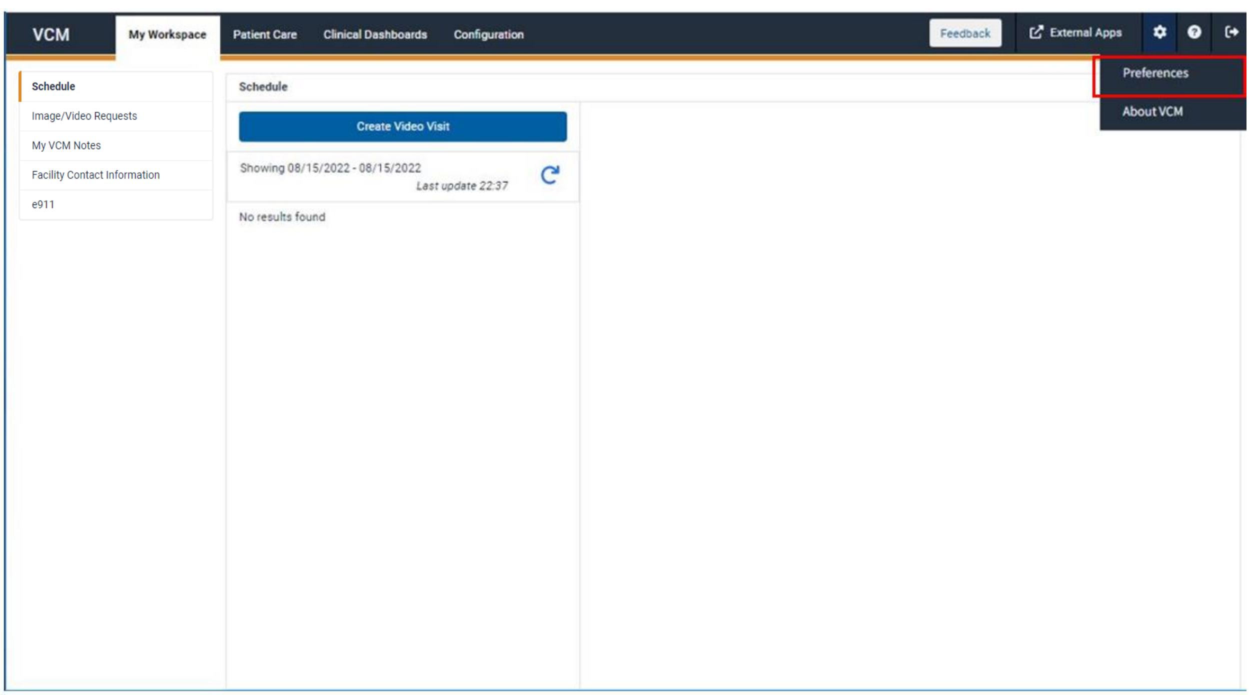
2. Settings and Help

Select the **Settings** button with the gear icon on the right side of the toolbar, to see the drop-down menu for Preferences and information About VCM. Select the **Help** button with the question mark on the right side of the toolbar for options for assistance, what to do in case of an emergency and for additional information. All items in the toolbar are available across My Workspace, Patient Care, Clinical Dashboard and Configuration tabs. (See images of **Help** and the toolbar below.)



2.1 Preferences

Customize your user experience by selecting **Preferences** from the Settings drop-down menu.

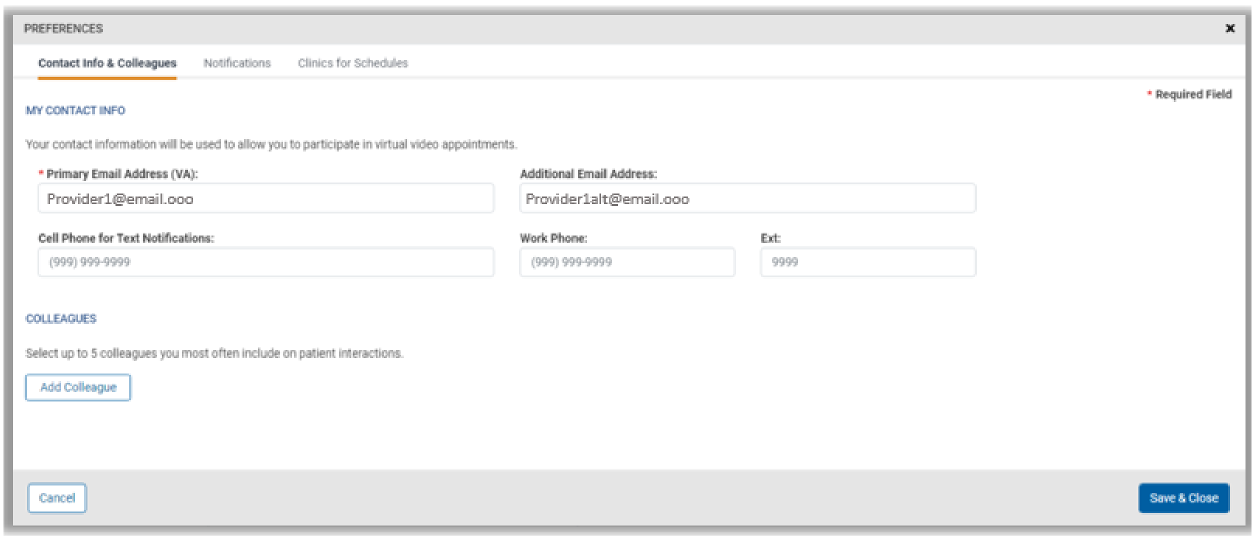


2.1.1 Contact Info & Colleagues

The information on the Contact Info & Colleagues tab is used for creating and managing virtual video appointments.

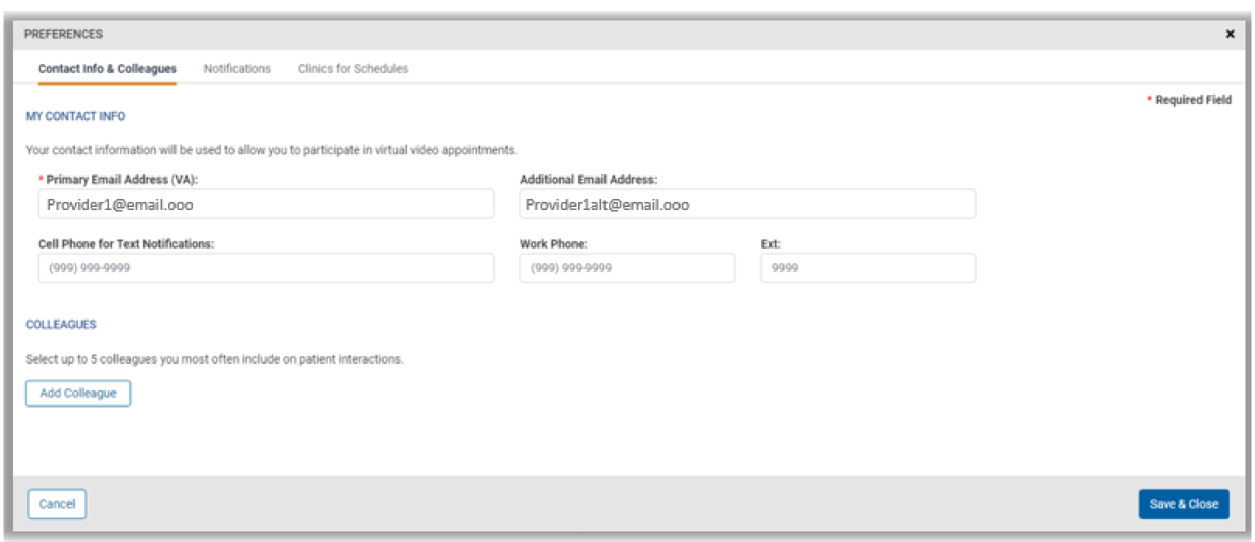
1. New users will need to enter contact information for the first time. Returning or existing users will have some information already included, which should be verified to ensure it is up to date to take full advantage of new capabilities being added to VCM.
2. Add or verify your contact information in the **Contact Info** section. The cell phone number entered will be used for Text Notifications.

Select the **Add Colleague** button to easily add up to five other healthcare providers with whom you most frequently collaborate to easily include them in Video Visits.



2.1.1.1 Join Another Provider's Video Visit

1. In Preferences, an **additional provider** that needs to join another provider's video session goes to Settings -> Preferences -> Contact Info & Colleagues and then enters provider's VA email address in "Additional Email Address", selects "Save & Close".

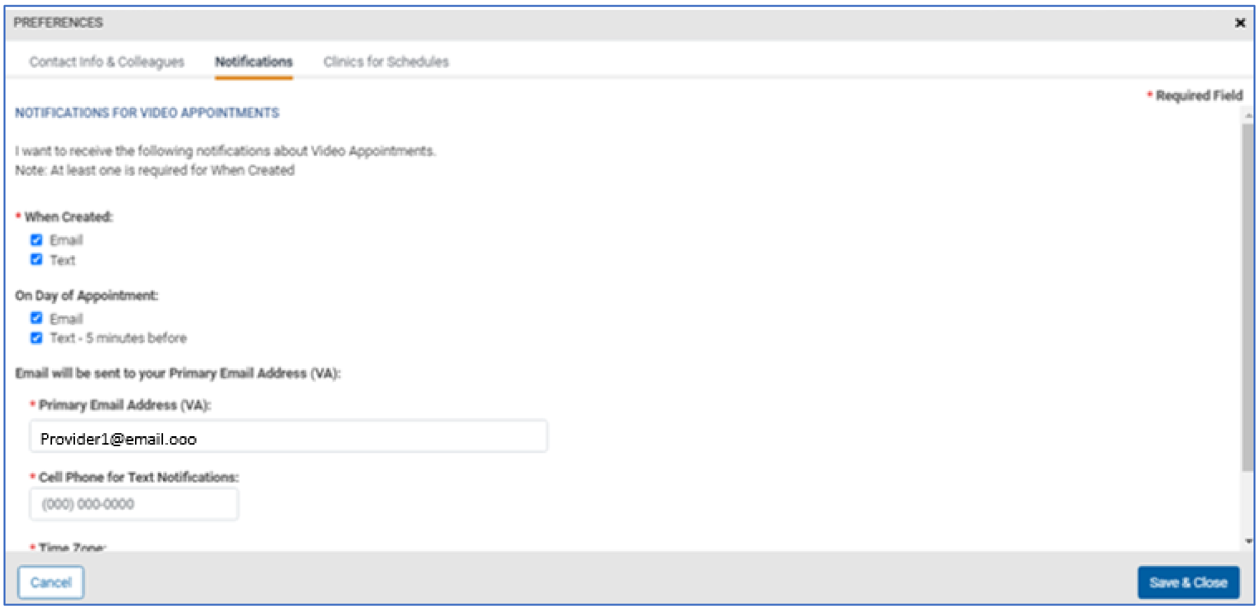


2. Now, the **additional provider** should be able to see all of the other provider's video visits in "My Workspace". They will be interspersed with the additional provider's own visits but in the details, the **additional provider** will see the provider's name for the particular one scheduled.
3. As long as the **additional provider** is viewing the appointment during the time of the visit, the **additional provider** should be able to select "Start Video Visit" and join the visit.

2.1.2 Notifications

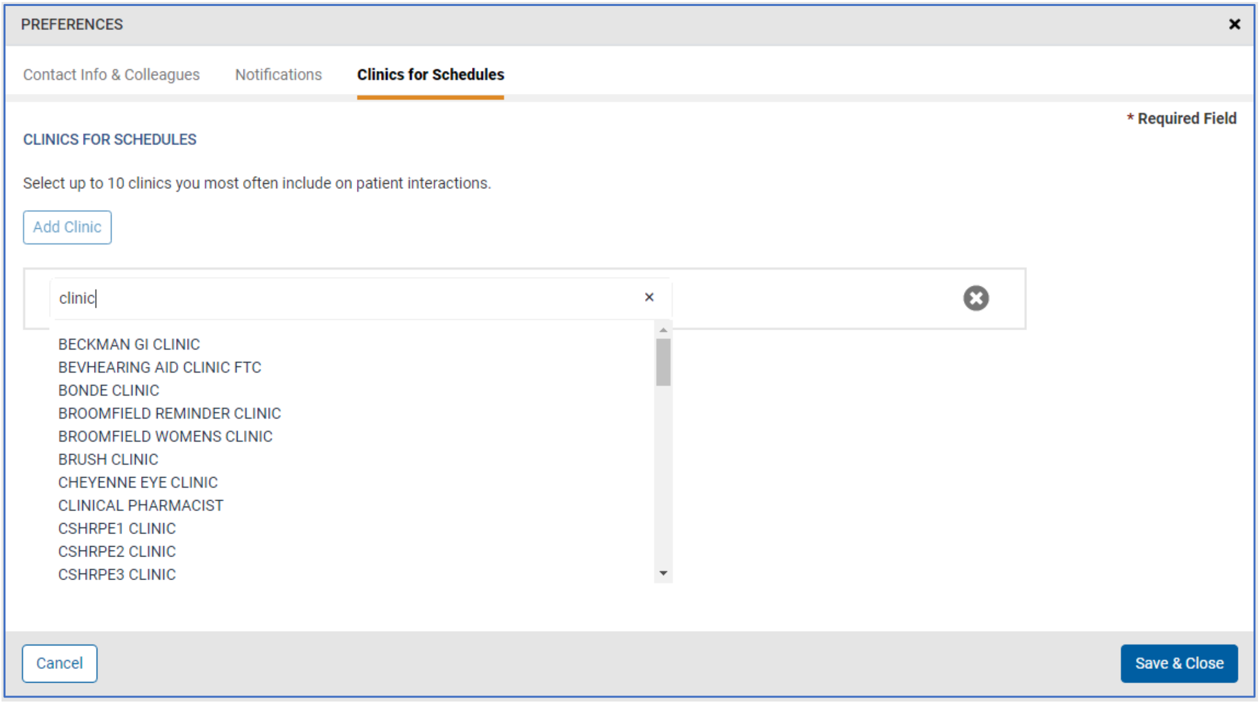
Use the Notifications tab to set preferences for how you are notified or reminded about upcoming video appointments.

You must select to receive either an email or a text notification when the appointment is created. For day of appointment reminders, you may select to receive email, text, both, or neither.

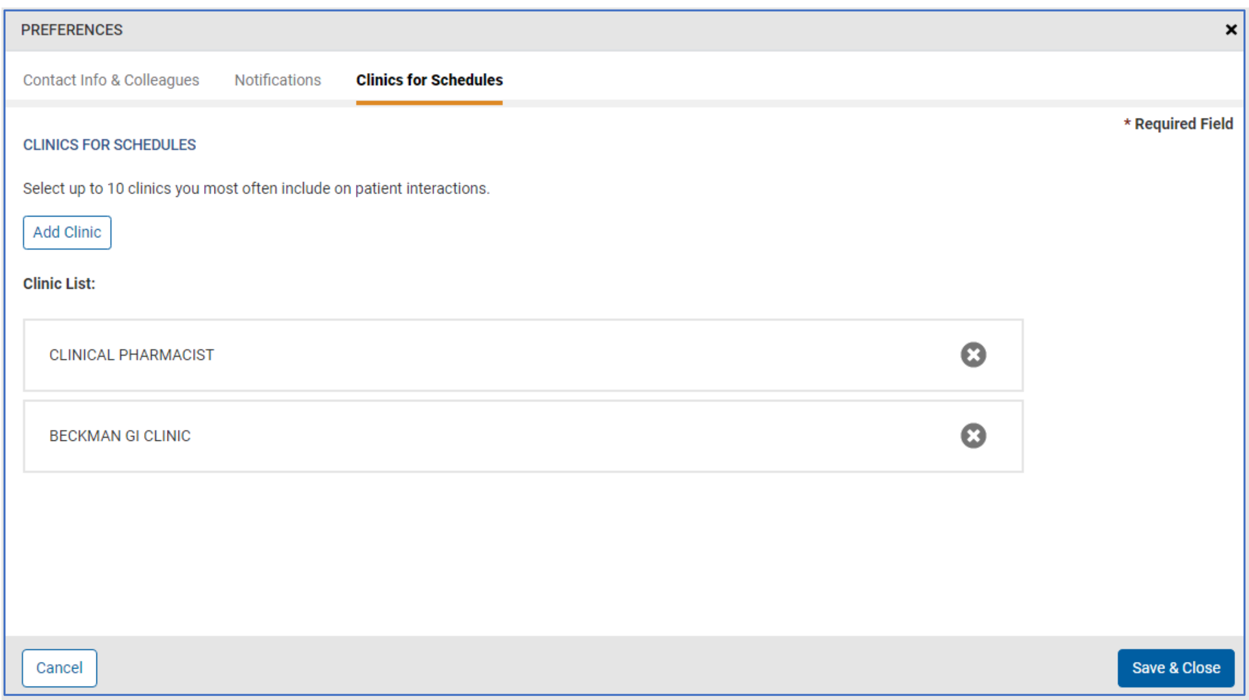


2.1.3 Clinics for Schedules

The Clinics for Schedules tab allows you to link your user information profile with the profiles of up to ten of the healthcare provider clinics you communicate with most frequently.

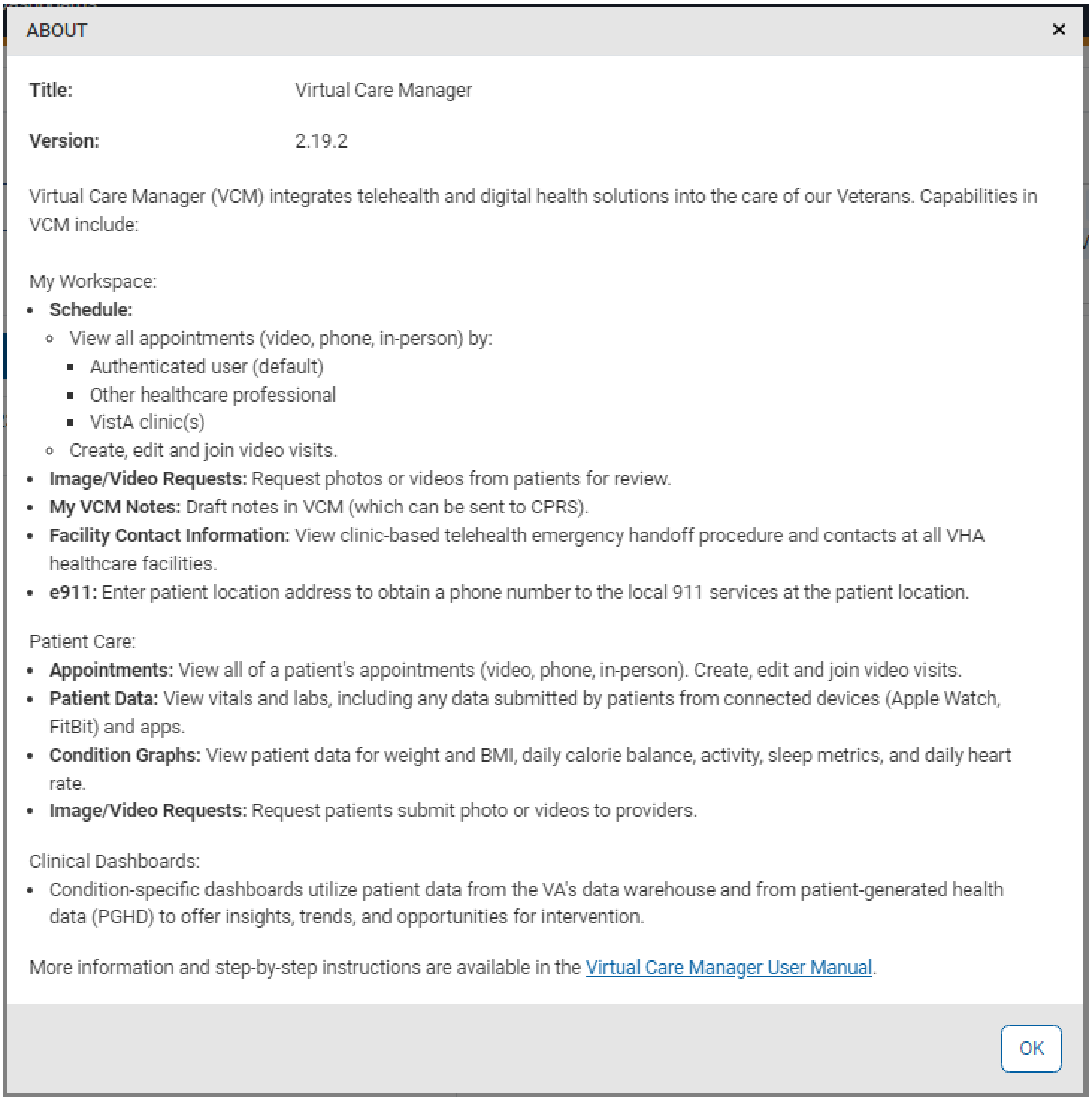


1. Select the **Add Clinic** button to reveal the search field. Begin typing and a drop-down selection list will populate using that criteria.
2. Scroll to search through the results and make a choice or enter more characters to refine the options available. Choose the healthcare clinic from the list to add it to the tab.



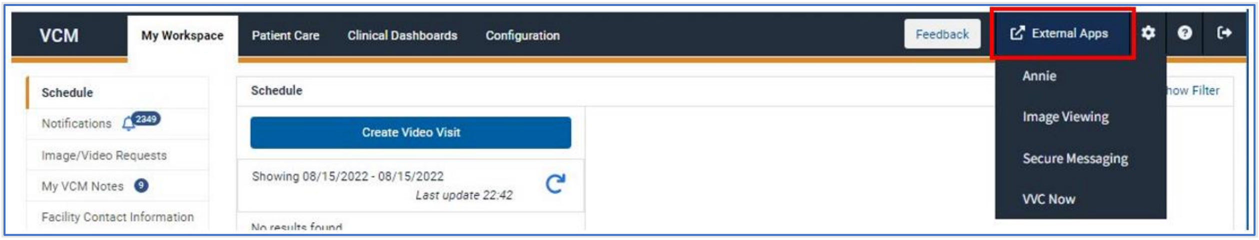
3. Choose additional clinics if needed.
4. Quickly revise the list of added clinics by selecting the "**X**" on the right side of the clinic name to remove it.

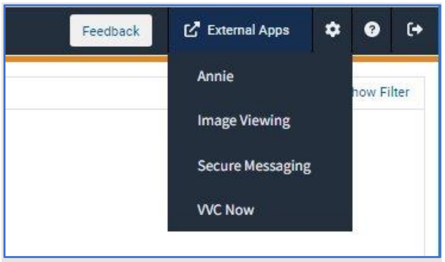
2.2 About VCM



3. External Apps

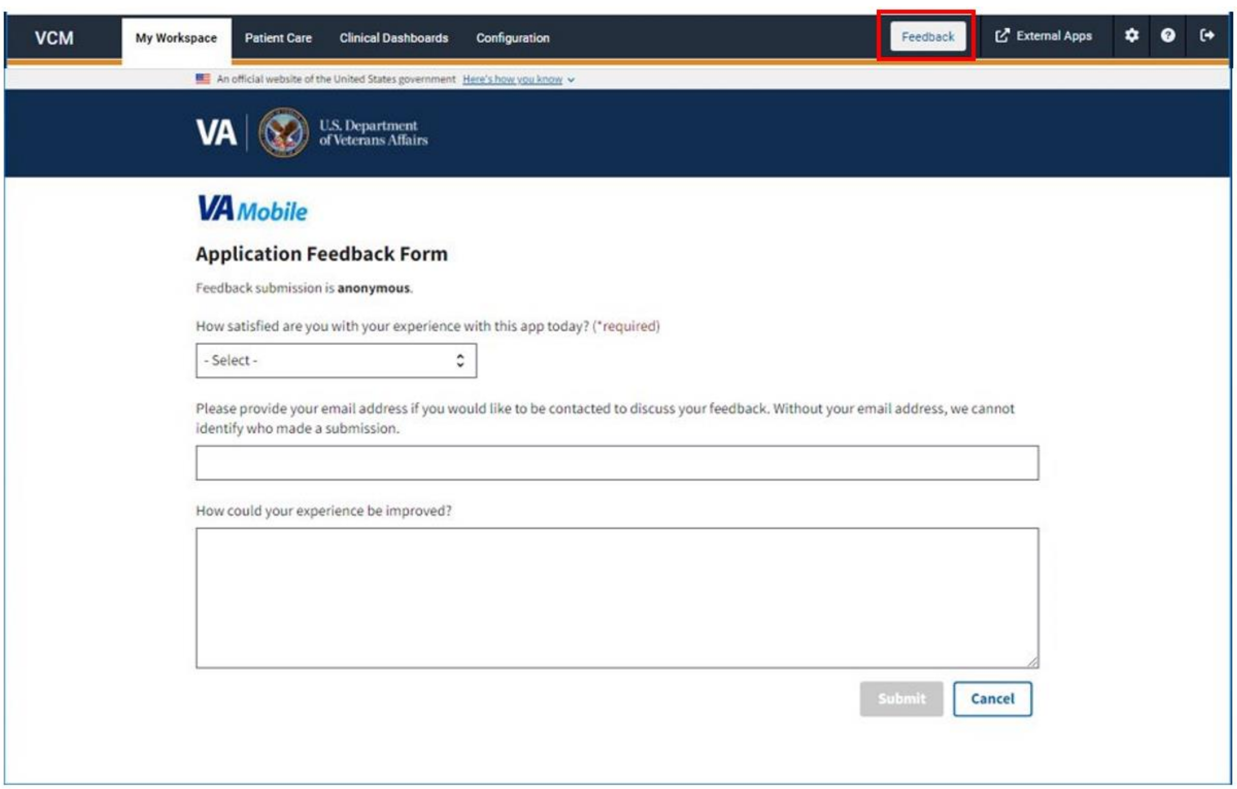
Select External Apps to launch other VA applications from Virtual Care Manager. These applications will open in a separate browser tab or window. In VCM 2.13 the applications available are Annie, Image Viewing, Secure Messaging and VVC Now.





4. Feedback UI

Feedback UI button is available in the header bar in VCM. The link to the Feedback UI application gives users an opportunity to provide comments about VCM. Selecting the Feedback UI button causes the Feedback UI application to open in a new tab or window.



5. Patient Care Tab

This tab is the Patient Care area of VCM, which provides information related to the selected patient.

Note: To create an appointment for a patient, they must be in the current Veterans Health Information System and Technology Architecture (VistA). Otherwise, refer to Section *6.1.3 Create New Video Visit for a Single Veteran (Email Only)*.

VA.gov profile is the source for the patient address, email, and phone number options. Information on how patients can update their address and other contact information can be found at: https://www.va.gov/change-address/

5.1 Patient Search – Select Patient

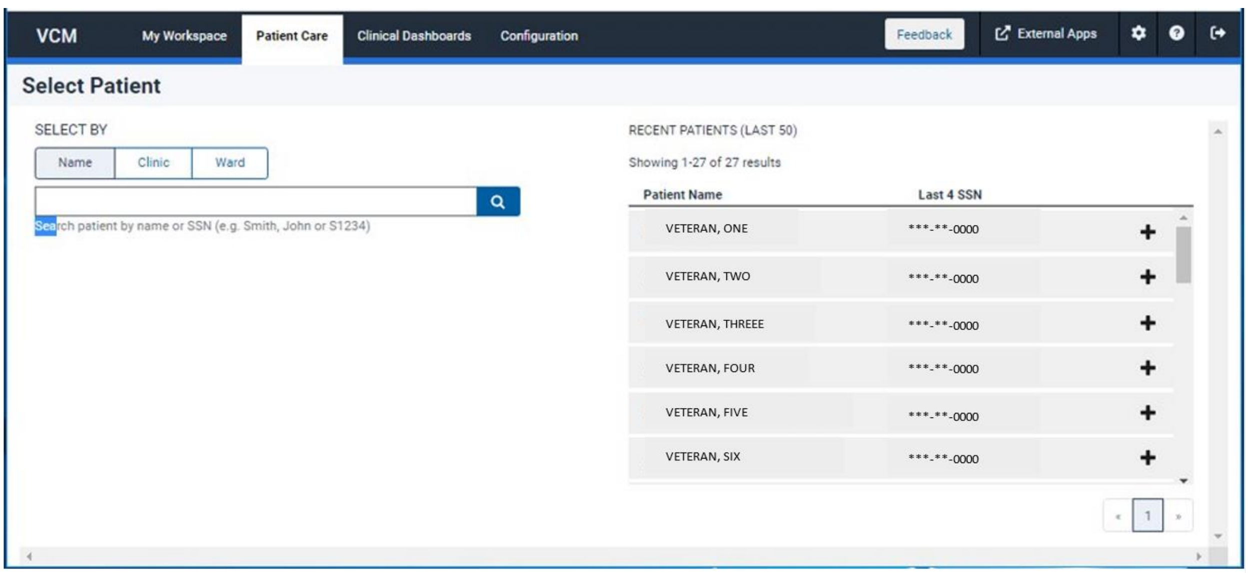
Patient searches are supported by three categories, or filters, for focusing the search criteria:

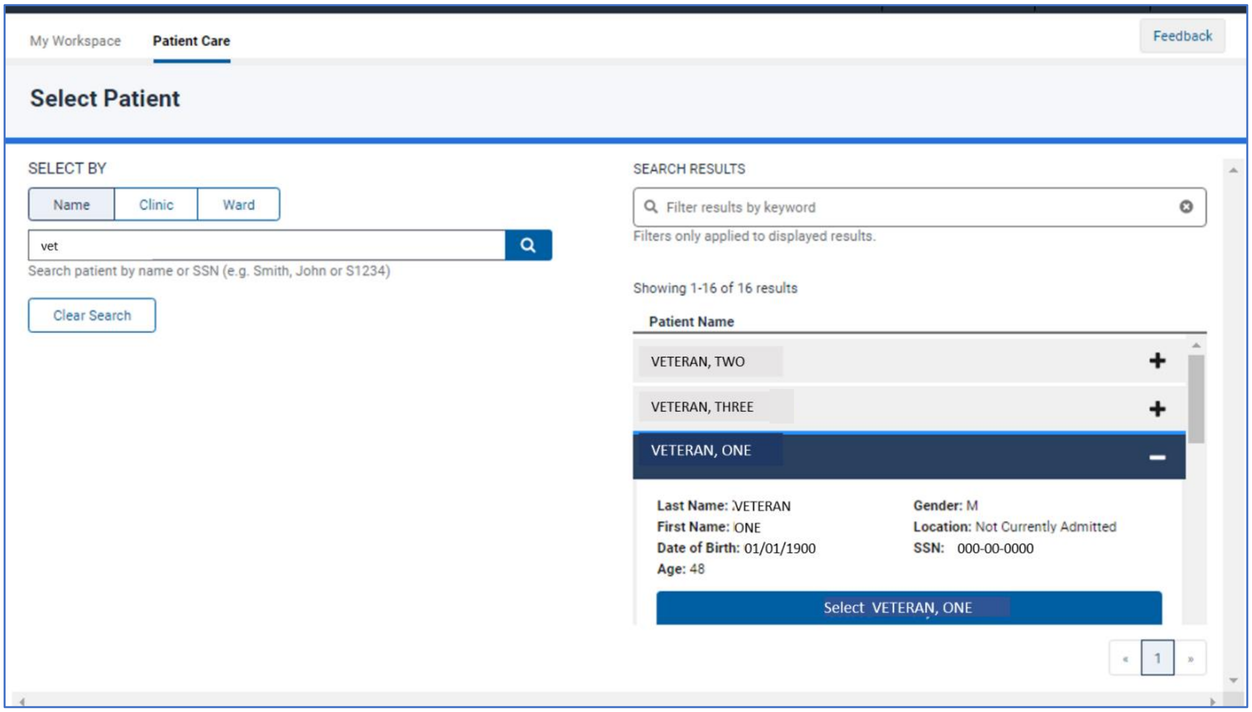
- **Name**
- **Clinic**
- **Ward**

5.1.1 Patient Name Search

The default view on the Name search screen displays the most recent patients in a list on the right.

For patients who are sensitive will be noted as *Sensitive* and the SSN does not display. For non-sensitive patients, the last 4 of the SSN displays.

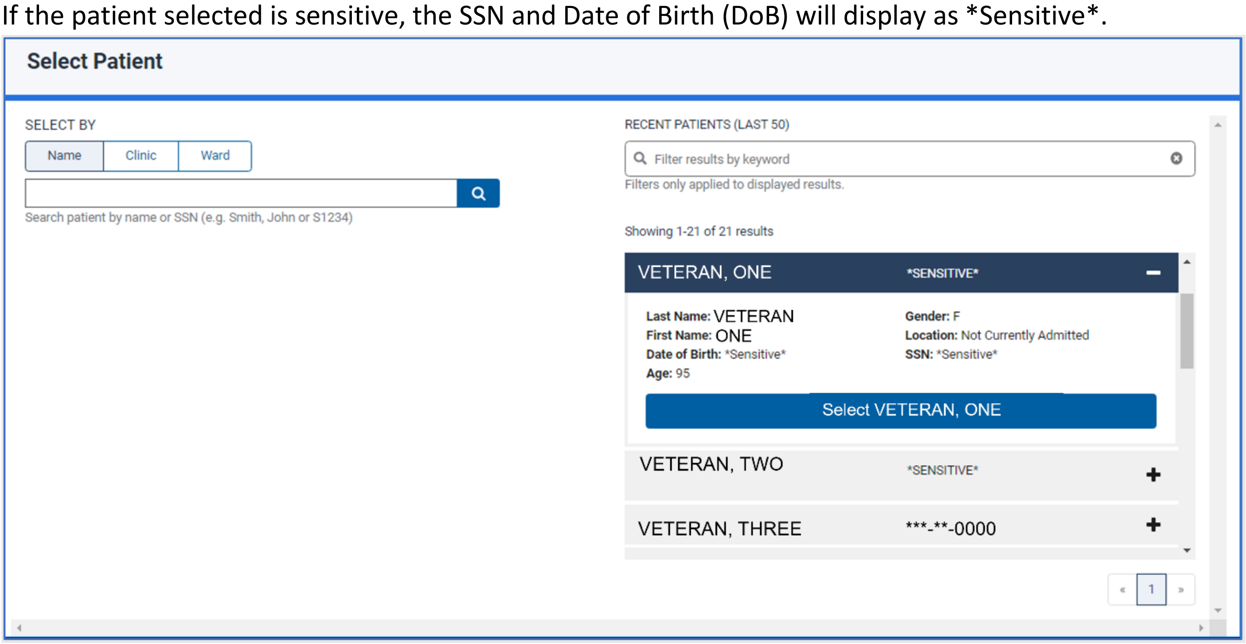




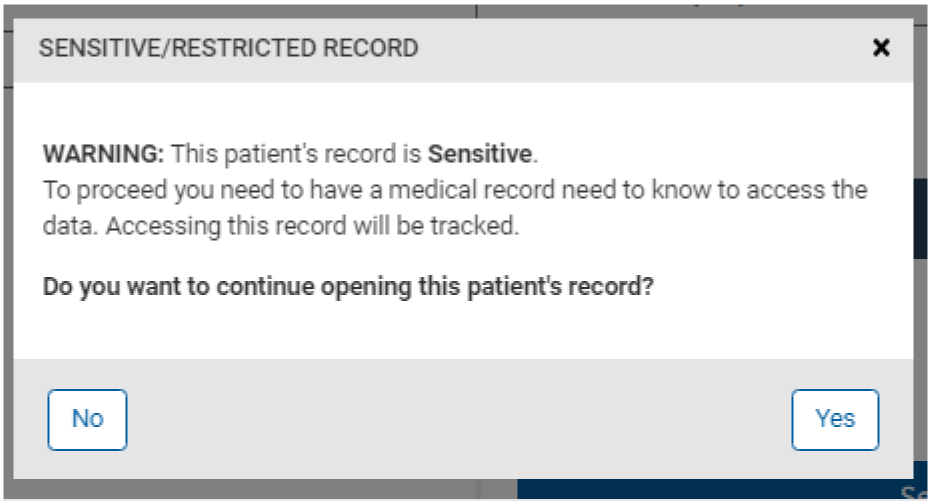
To search for a patient by name:

1. Begin typing all or part of the **patient's last name** or **Social Security Number (SSN)** (SSN search with or without dashes, OR the "Last Init + SSN Last 4" (e.g., S1234)) in the search field. Results will appear on the right side of the screen, generated by the characters typed in the search field. Enter more characters to narrow the search results.
2. Scroll through the results to find the name, expand the record to confirm the identified patient by selecting the "**+**", or "**plus-sign**" to the right of their name.
3. Confirm by using the **Select** button with their name.

If the patient selected is sensitive, the SSN and Date of Birth (DoB) will display as *Sensitive*.

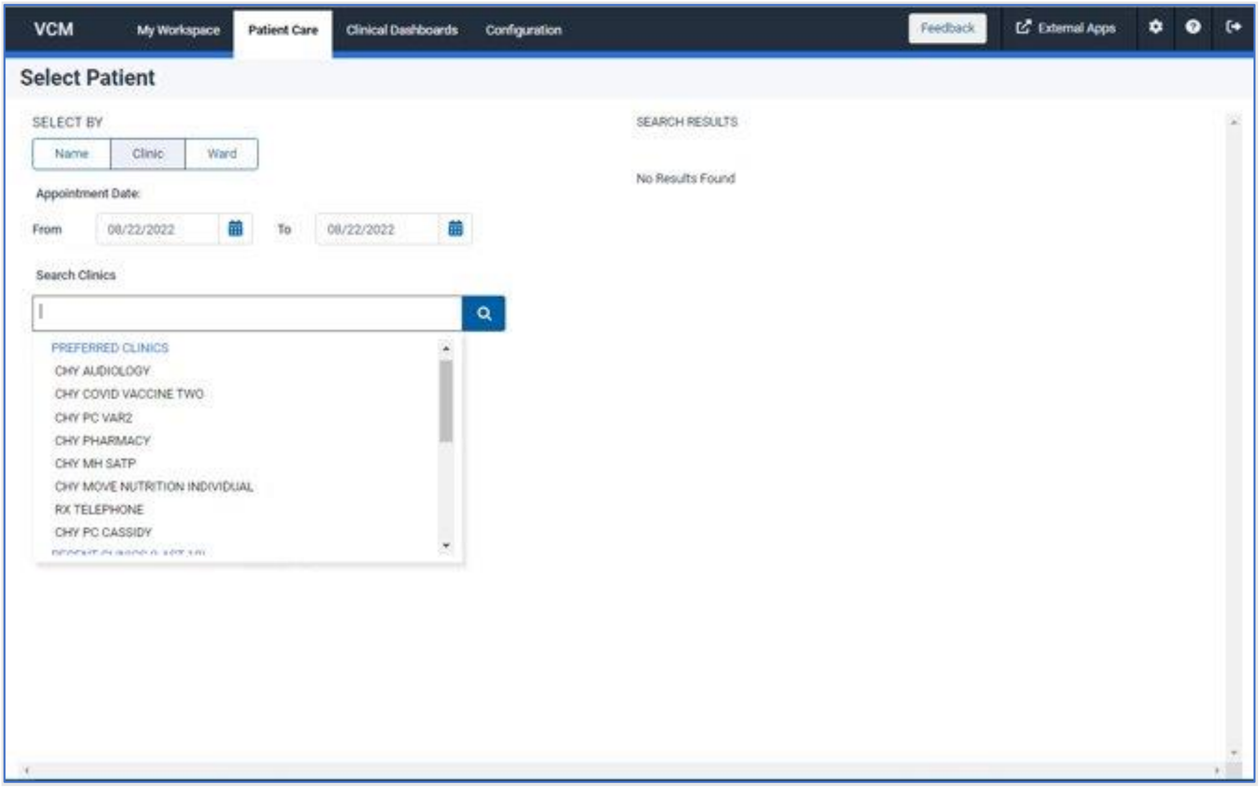


When the Patient is selected, a modal displays to confirm selection of the patient.



5.1.2 Clinic Search

The default view on the Clinic search screen displays the most recent clinics in a list on the left. Clinic Search is not available for future dates. To search for a patient in Clinic, the date range must be on or earlier than the current date.

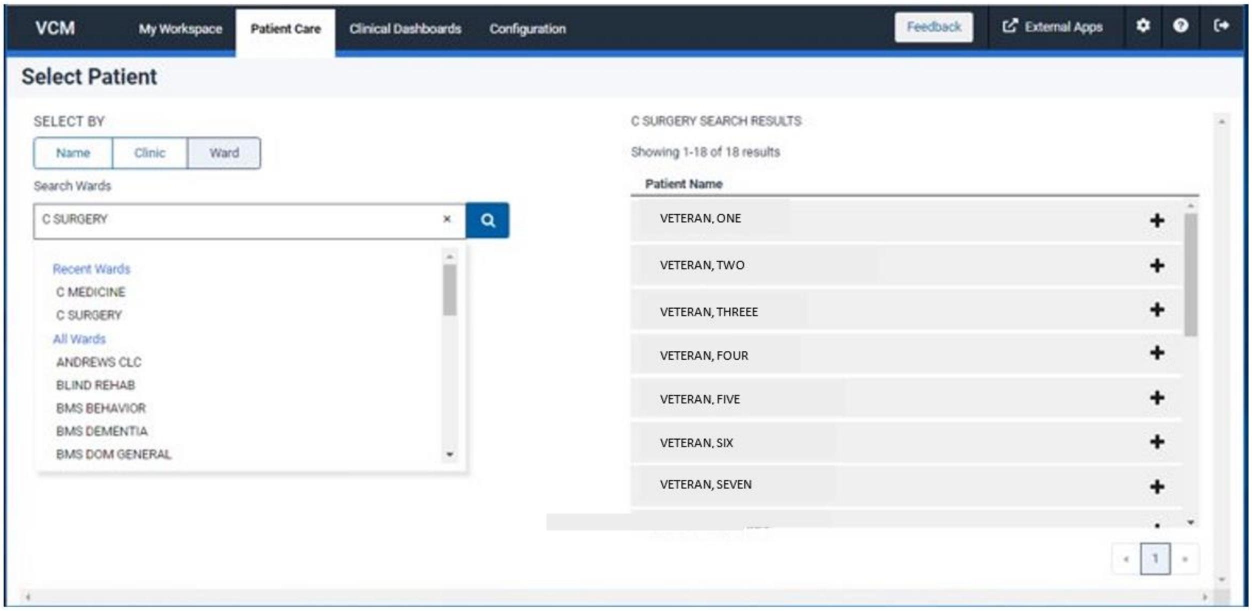


To search for a patient by Clinic:

1. Begin typing the **clinic name**. Results will appear on the right side of the screen, generated by your search criteria.
2. Search by Clinic does not support future dates.
3. Scroll through the results to find the patient name, expand the record to confirm the identified patient by selecting the "**+**", or "**plus-sign**" to the right of their name.
4. Confirm by using the **Select** button with their name.

5.1.3 Ward Search

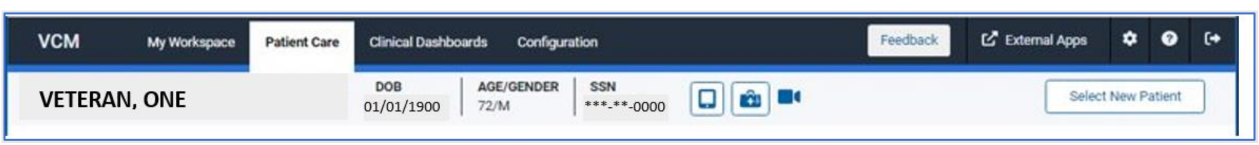
The default view on the Ward search screen displays the most recent Wards in a list on the left.



To search for a patient by Ward:

1. Begin typing the **ward name**. Results will appear on the right side of the screen, generated by your search criteria.
2. Scroll through the results to find the patient name, expand the record to confirm the identified patient by selecting the "**+**", or "**plus-sign**" to the right of their name.
3. Confirm by using the **Select** button with their name.

Once a patient is found in the search results and they are selected, details for the patient in context will display in a banner at the top of the screen, with quick-access buttons for additional information and messaging.



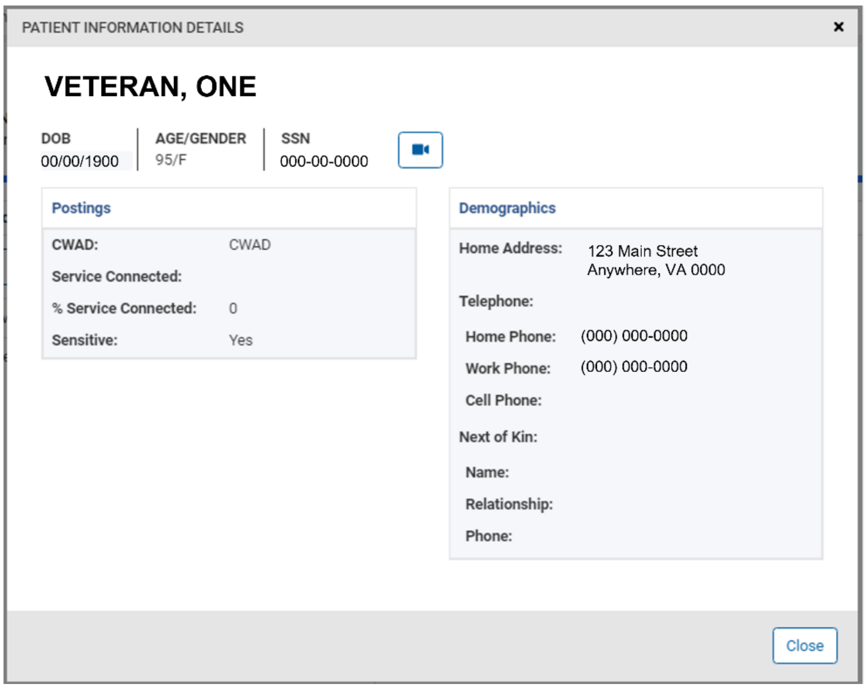
4. Revert to the Patient Search screen by choosing the **Select New Patient** button on the right side of the details banner.

If the Patient is Sensitive, the DOB and SSN areas will display *Sensitive*.

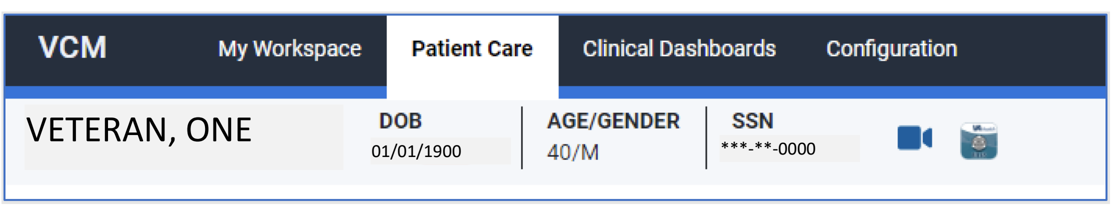
The area over patient information is selectable and will display a border when the mouse moves over it.

When a user selects the Patient information area, the Patient Details modal displays. The Date of Birth and SSN are fully displayed in this modal for all patients.

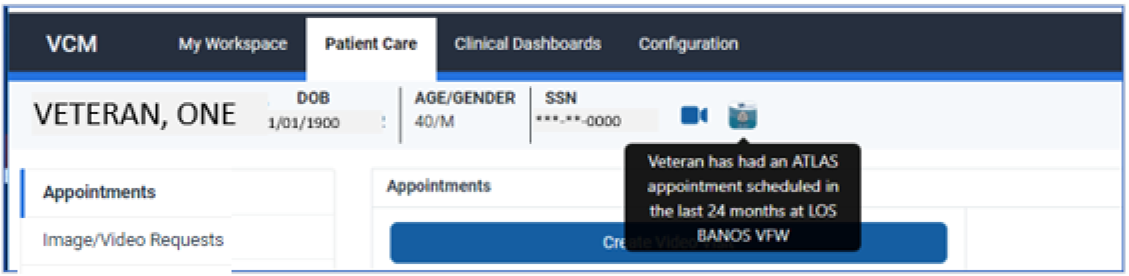
If a patient has had a Video Visit within the past 2 years, a badge displays with the patient information at the top of the page. If the patient has any GFE (government-furnished equipment), corresponding badges will appear in the Patient Details modal display. A **tablet badge** will display if the patient has a GFE tablet and a **medical bag** badge will display if the patient has any GFE peripheral devices. (See images above.)



If a patient has had an ATLAS Appointment within the past 2 years, a badge displays with the patient information at the top of the page.



Hover overing the badge will provide more context to the user.



5.2 Appointments

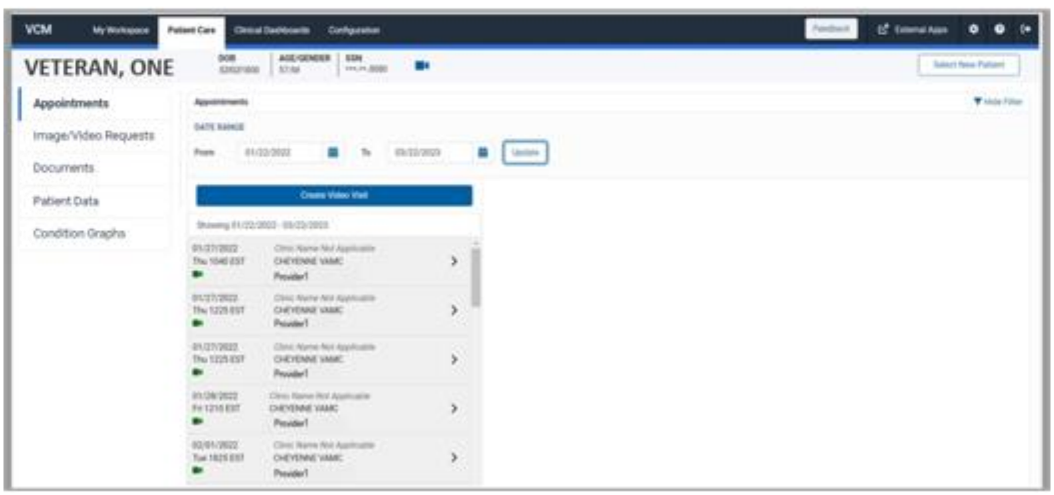
5.2.1 Upcoming Appointments

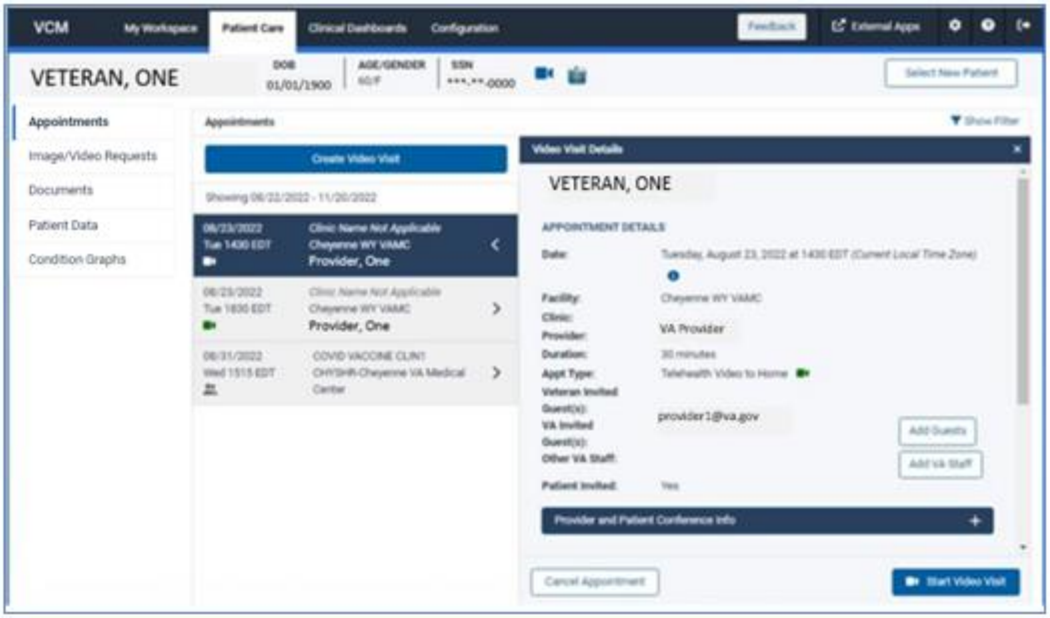
Scheduled appointments for a patient can be viewed within their Appointments tab. Appointments displayed include Telehealth, Traditional (In Person), and Telephone.

If the appointment is Telehealth, a video camera icon displays in the list view. If the Clinic name contains “Phone” or “Telephone”, a telephone icon displays. Traditional (In Person) appointments do not have an icon.

5.2.1.1 Appointment Filter

1. Expand or minimize the date range Filter using the **From** and **To** fields, and then select the **Update** button for the modified results to appear. A three-month default range will appear automatically.
2. Select an **appointment** from the results to view the Appointment Details.



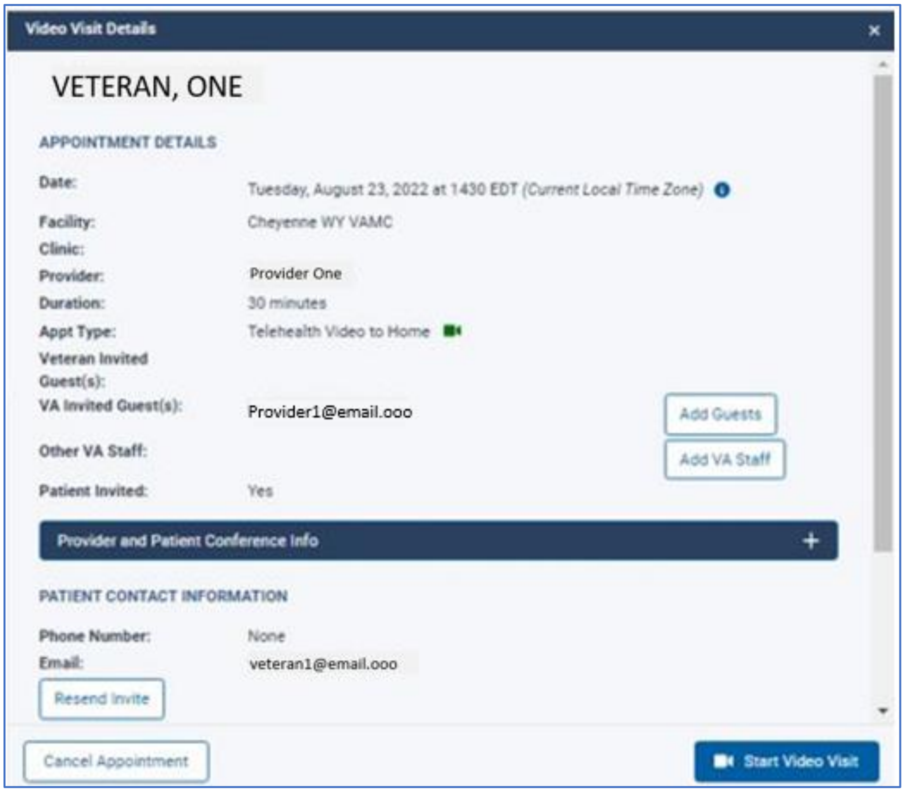


5.2.1.2 Appointment Details View

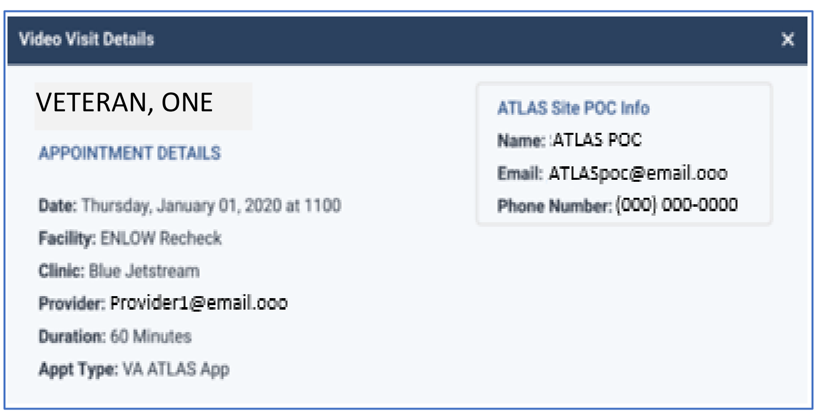
In the Appointment Details, there are appointment management buttons for Telehealth appointments, such as a Resend Notification button for updates to appointments, a Start button for Video Visits, and a Cancel Appointment button.

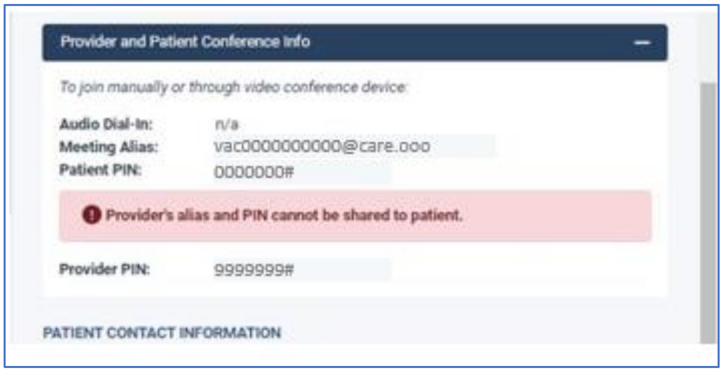
To assist the VCM user and patient with joining the Video Visit manually, the **plus sign (+)** next to the **Provider and Patient Conference Info** within Video Visit details may be selected to expand the field and display any Audio Dial-In information, as well as the Meeting Alias and Patient PIN. The Provider PIN is also included, but with a warning that this information cannot be shared with the patient, as it would allow the patient to have host privileges during the Video Visit. (See images below.)

Note: Traditional and Telephone appointments cannot be managed from VCM.



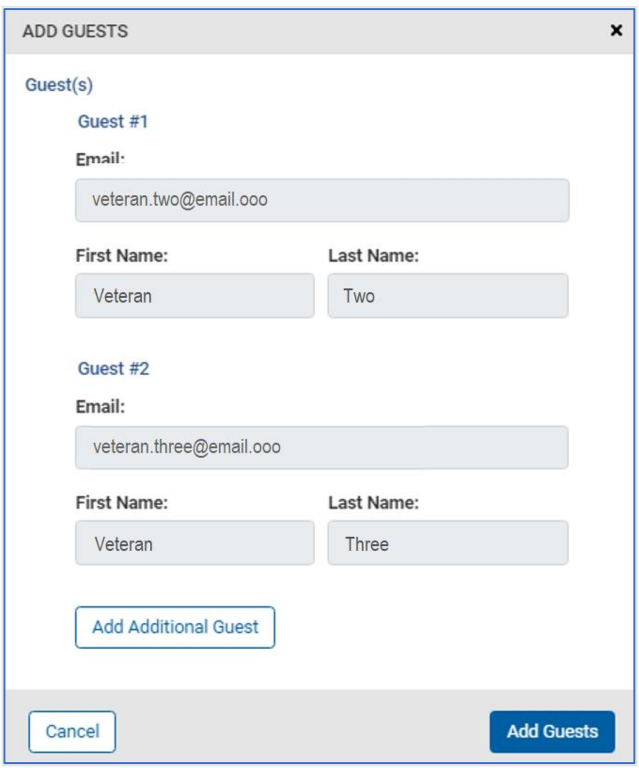
If the appointment KIND (or Appt Type) was an ATLAS appointment, then the ATLAS Site POC information will be included within the Appointment Details View.





5.2.1.3 Add Guests

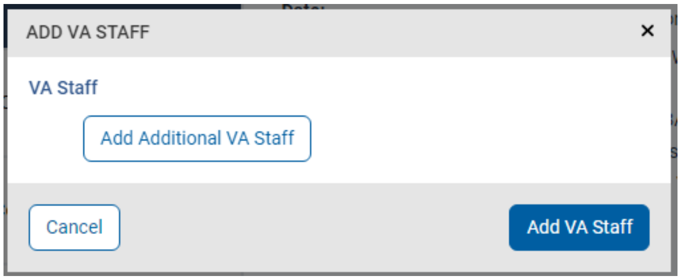
To add up to five guests, select the **Add Guests** button on the Video Visit Details view. The Add Guests modal will appear, with entry fields for guest Email address and Name, with a default of two guests. To add up to three more guests, select the **Add Additional Guest** button to reveal additional guest information entry fields.

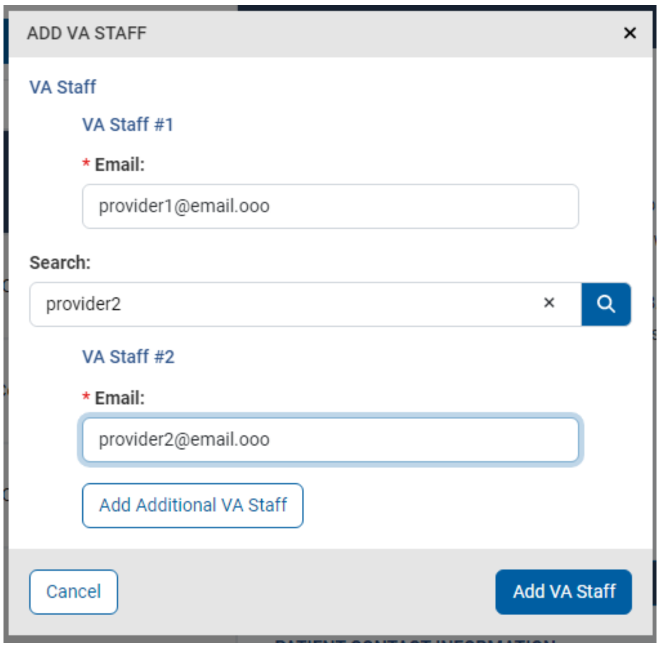


Once all guest details have been added, select the **Add Guests** button again, to save their information in the appointment.

5.2.1.4 Add VA Staff

To add up to five VA Staff, select the **Add VA Staff** button on the Video Visit Details view. The Add VA Staff modal will appear, with entry fields for VA staff Email address and Name, with a default of two VA staff members. To add up to three more VA staff members, select the **Add Additional VA Staff** button to reveal additional staff information entry fields.





Once all VA Staff details have been added, select the **Add VA Staff** button again, to save their information in the appointment.

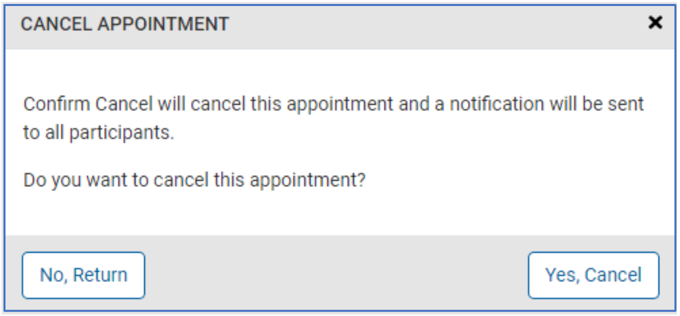
5.2.1.5 Start a Video Visit

To initiate a video visit, select the **Start Video Visit** button. This will direct you to the VVC application (Web or iOS, depending on your device type).

5.2.1.6 Cancel Appointment

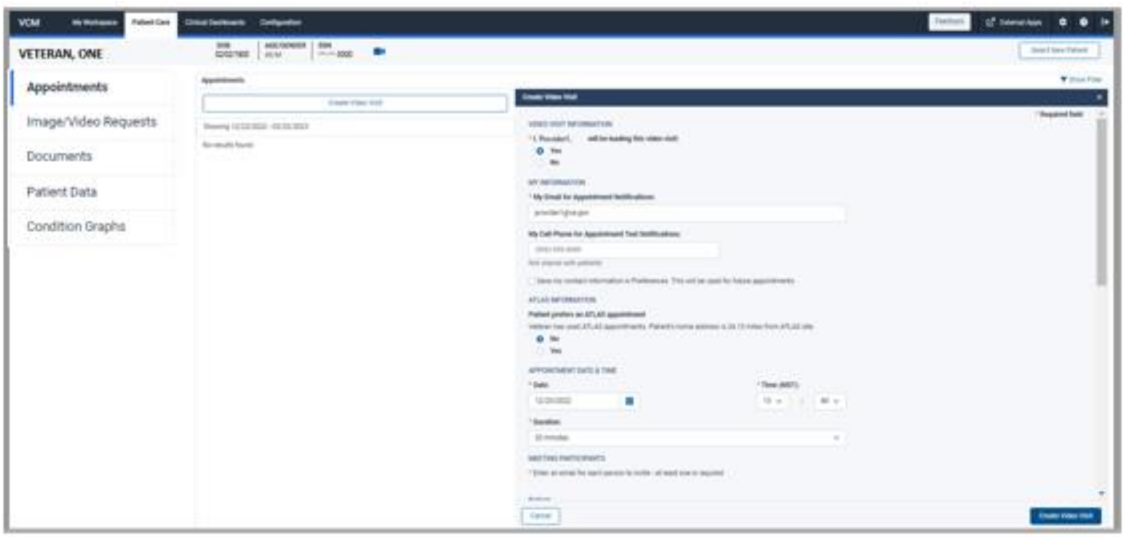
Note: Cancelation is not available for clinic-based and store-and-forward appointments

1. While on the details screen for an appointment, select the **Cancel Appointment** button at the bottom of the screen.
2. A confirmation modal will appear, giving you the opportunity to stop the cancelation before proceeding. Select the **Yes, Continue** button to proceed.

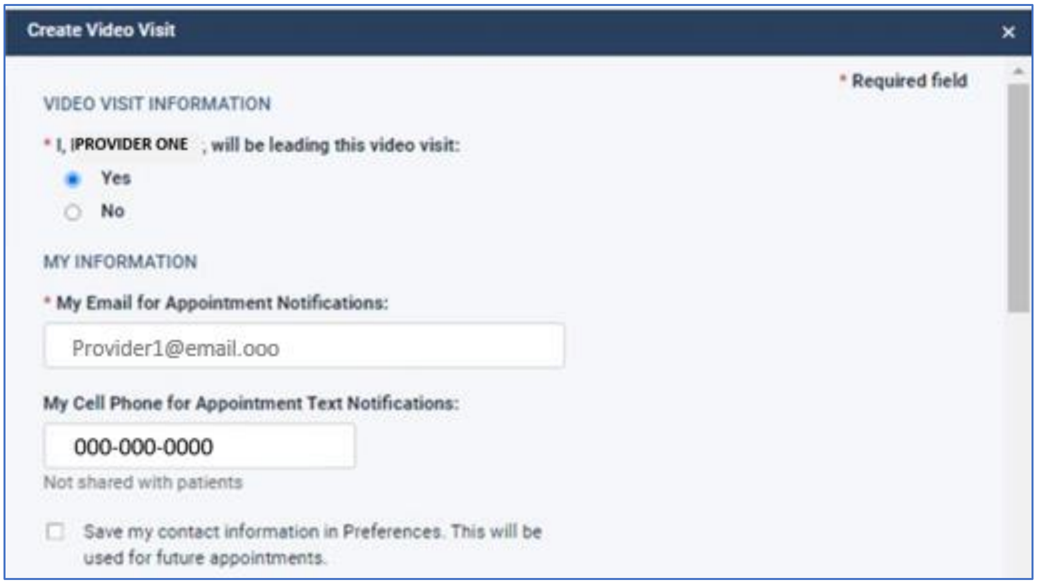


5.2.2 Create New Video Visit

1. On the Patient information screen, select the **Create Video Visit** button to schedule a new Video Visit.

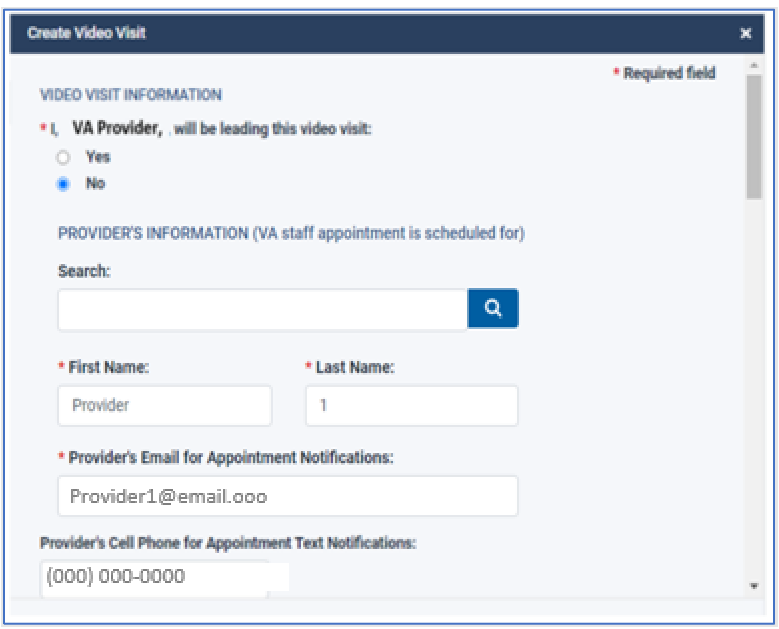


2. Indicate who is creating the appointment. The visit information form will default to the **Yes** radio-button, meaning the appointment is for you, the provider.
3. To update your preferences, check the “Save my contact information in Preferences” box.

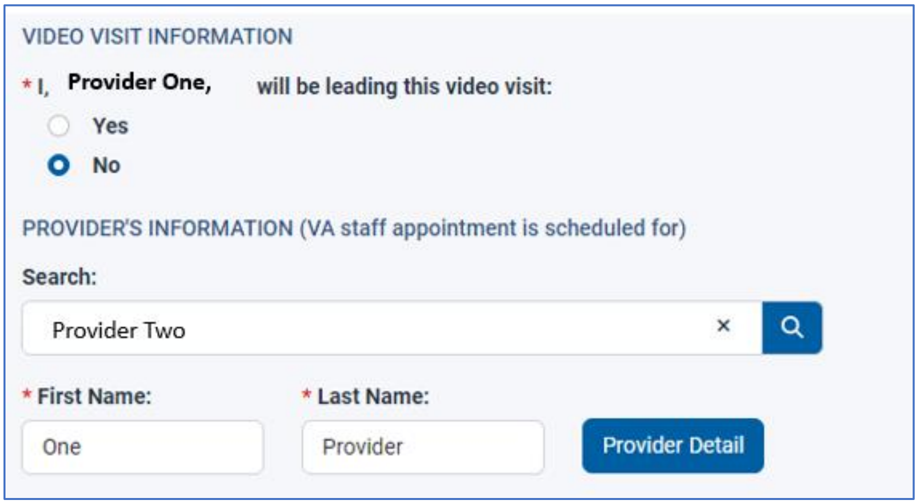


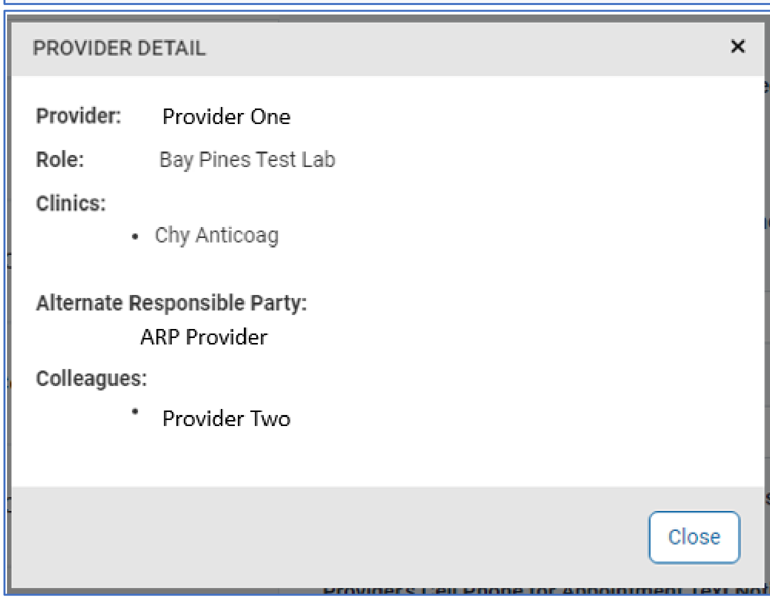
Note: *If you are not the provider*, choose **No** to create the appointment for someone else. Follow **Steps a-d** in this section to create an appointment for a single participant, on behalf of someone else.

Create a New Video Visit for Others



a. Type in the search field and a drop-down will populate based on the characters entered. After selecting a Provider, if that Provider has preferences set in VCM, a button will display to the right of their name. When the button is selected a modal displays information about the Provider to help ensure that the correct name was selected.

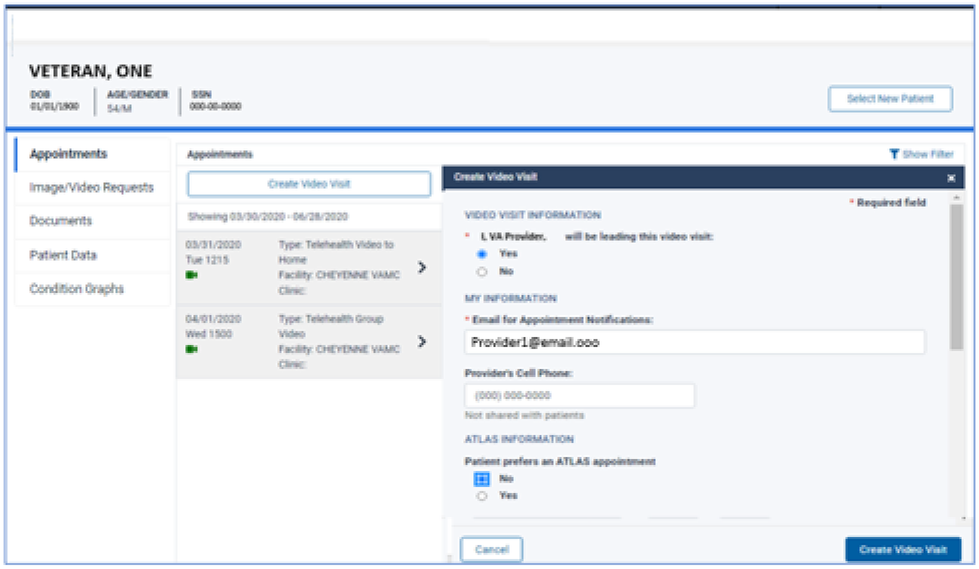




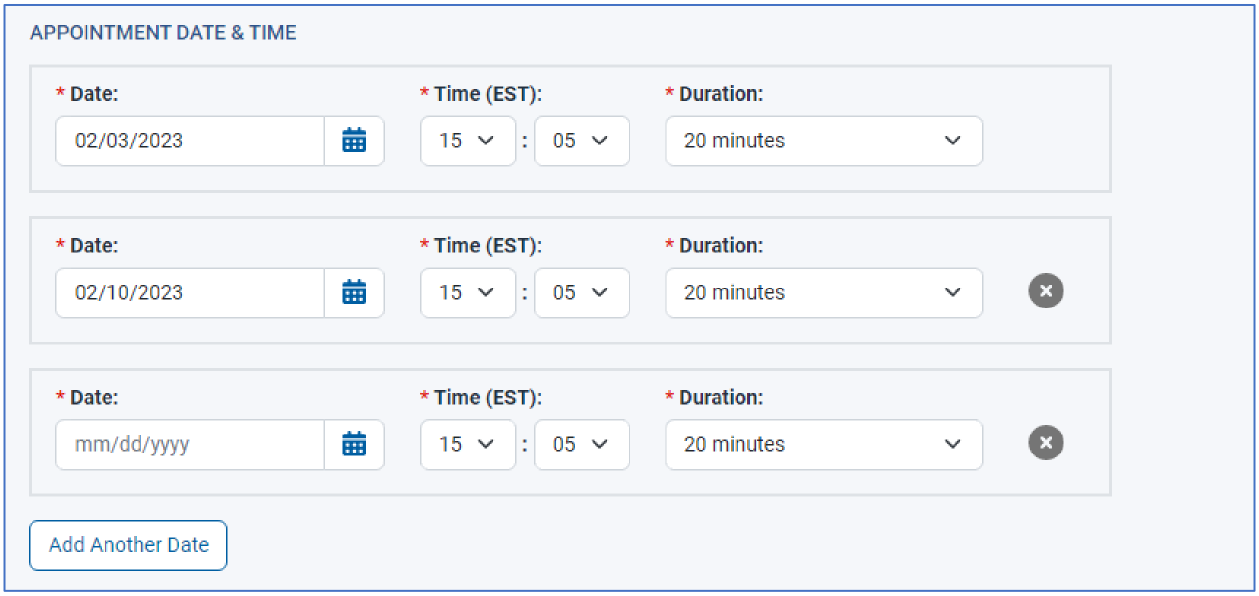
b. If the characters entered include a typo or for any other reason do not match a name in the system, an error note will appear in the drop-down; adjust as needed to find the correct name.
c. Choose the name from the list and it will be added to the appointment as the care provider.
d. If the name is not found, enter the First Name, Last Name and Email address for the care provider manually.
e. At this time, continue to one of the following sections to complete creation of the new appointment:

- If you are creating a Video Visit for one participant, continue to **Step 3** and the following steps in this section, to complete creation of the appointment.
- If you are creating a Video Visit for a Single Veteran (Email Only), return to **Step 5** in *Section 6.1.3 Create New Video Visit for a Single Veteran (Email Only)*, to complete creation of the appointment.

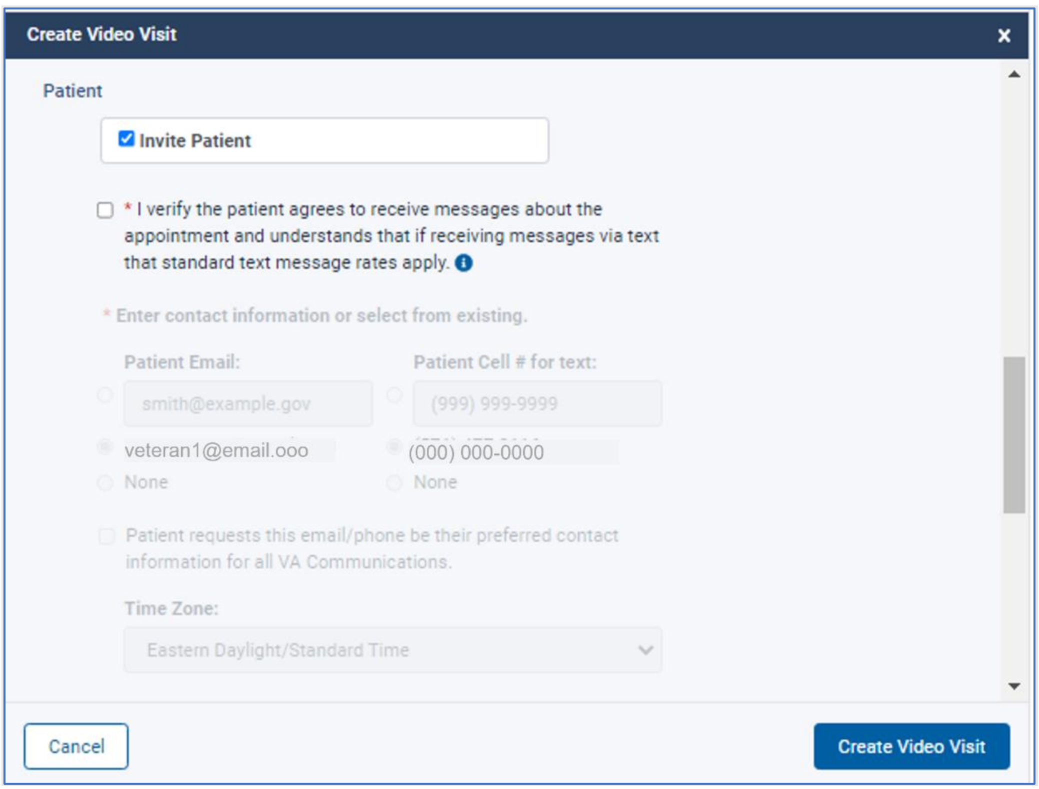
- If you are creating a Group Video Visit, return to **Step 5** in *Section 6.1.4 Create New Group Video Visit*, to complete creation of the appointment.



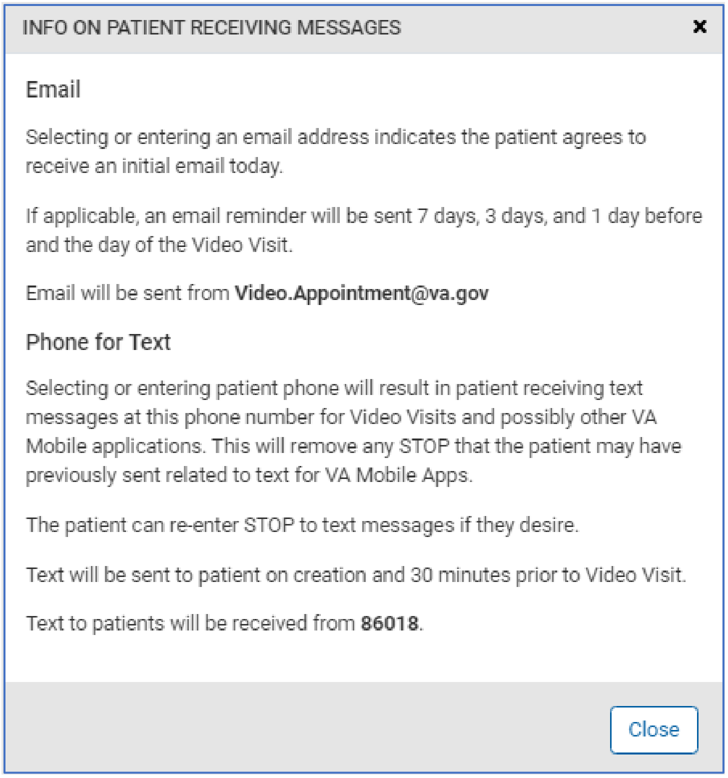
4. Add or verify your contact information.
5. Indicate whether it will be an ATLAS appointment. The option will default to **No**.
6. Set the date, time, and duration of the appointment.
7. Create Multiple Video Visits
   VCM users may create multiple Video Visits for a Single Veteran or Group in the same instance without the need to confirm and create each Video Visit one at a time. When creating multiple Video Visits in one instance, the Video Visits must be for the same Single Veteran or Group, but the days, times and duration of the Video Visits may vary.
   Rather than confirm and create the Video Visit, the user instead selects **Add Another Date** to create up to ten Video Visits for the same Single Veteran or Group within the same instance. The date, time and duration must be entered for each unique Video Visit. The user can select the 'X' at the right of each appointment time to remove any Video Visit appointments that contain errors before confirming and creating multiple Video Visits.



8. Verify that the patient has agreed to receive messages about appointments by checking the box.

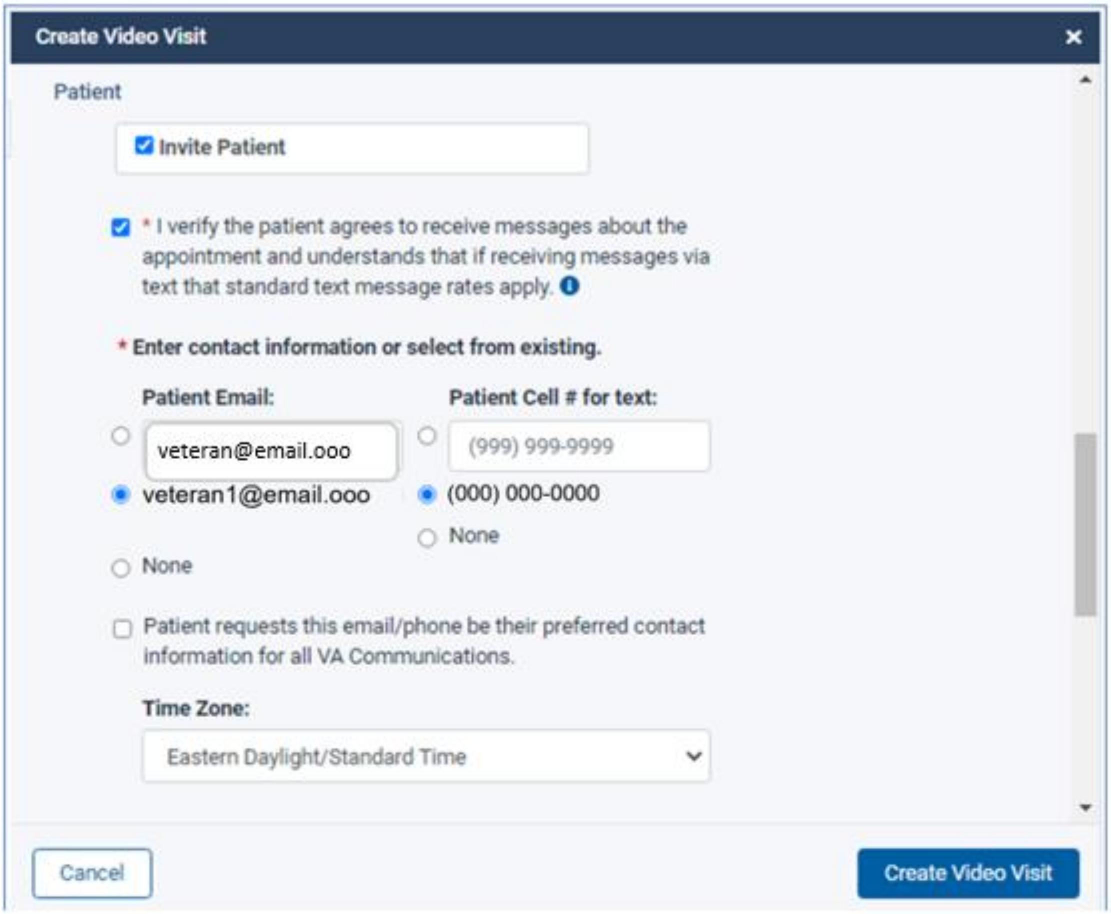


9. Selecting the “i” icon will open a modal explaining the messages the patient will receive.



10. Select the email and/or phone number for the patient. Patient contact information from the VA.gov profile and from previous VCM appointments will be displayed. If neither is accurate, a new email and or phone number can be entered. If the patient does not wish to receive text notifications and reminders for this appointment, select None. Information on how patients can update their contact information can be found at: https://www.va.gov/change-address/

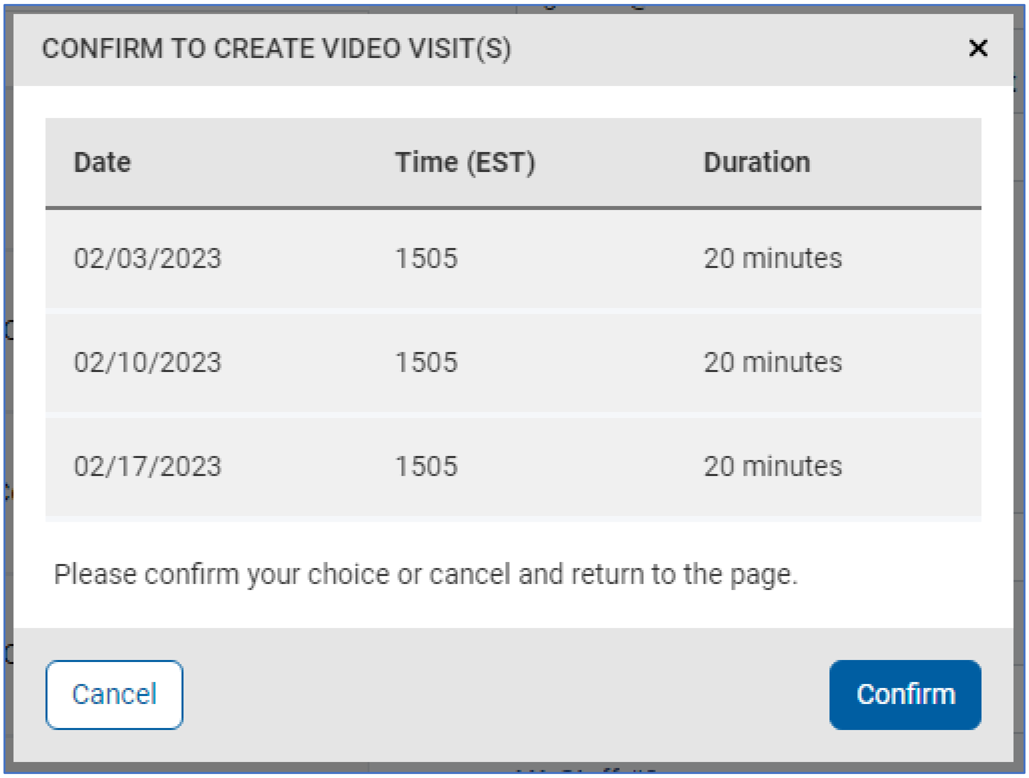
    Note: An Email OR Phone number must be included for an appointment.
    To update the patient's contact information, check the box "Patient Requests this email/phone be their preferred contact information for all VA Communications.



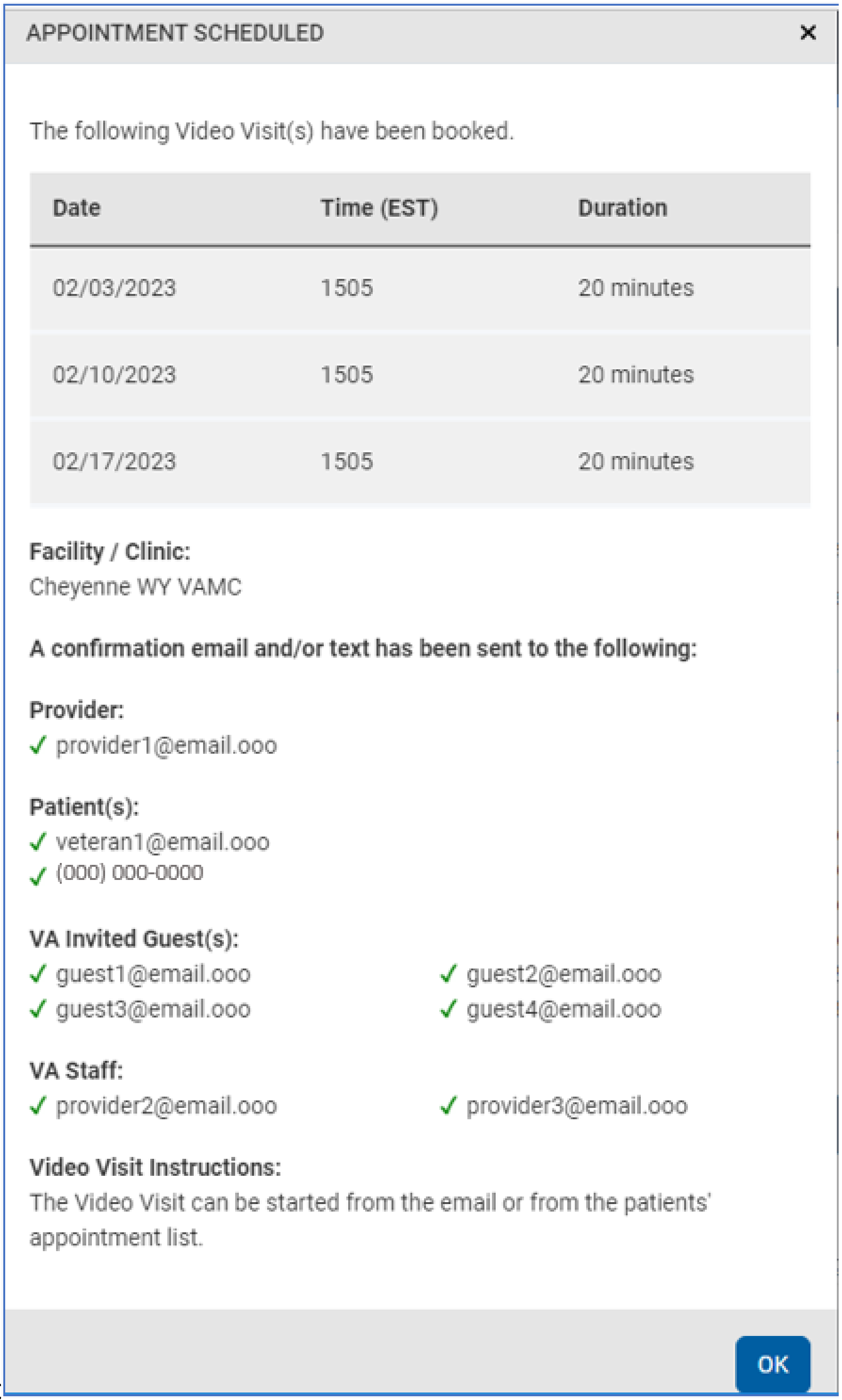
Note: The Patient is invited by default. If the appointment is to be held with a Caregiver or other VA Staff, the Patient may not be included. At least one participant beside the Provider must be included to create the video visit.

11. Once all required appointment details have been added, select the **Create Video Visit** button to complete scheduling.

    A confirmation modal will appear, displaying the appointment details.



The image below shows the **Appointment Scheduled** confirmation that displays once the user has selected **Confim** and the Video Visits are created.



C

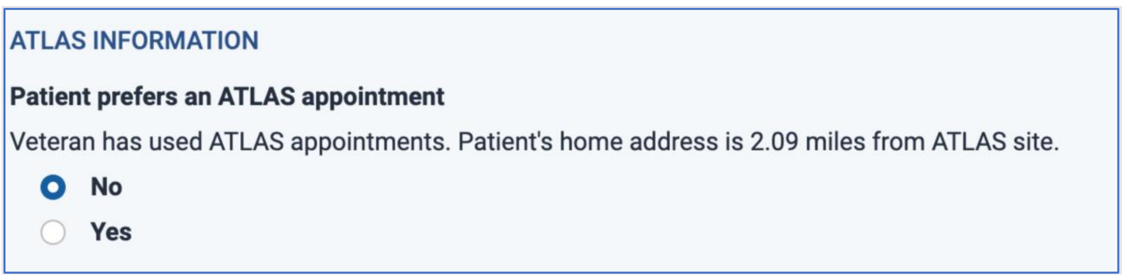
Note: Create Multiple supports the VCM user in creating multiple, unique Video Visits for Single Veterans or for Groups in one instance. Create Multiple does NOT create a series of recurring Video Visits for a Single Veteran or Group.

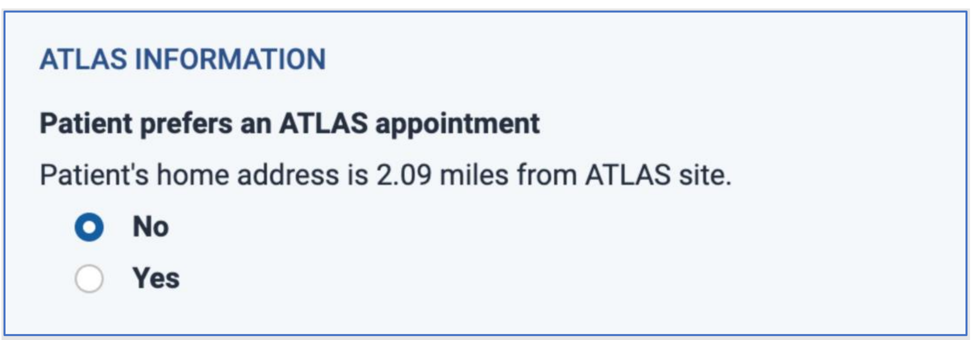
5.2.3 Create New ATLAS Appointment

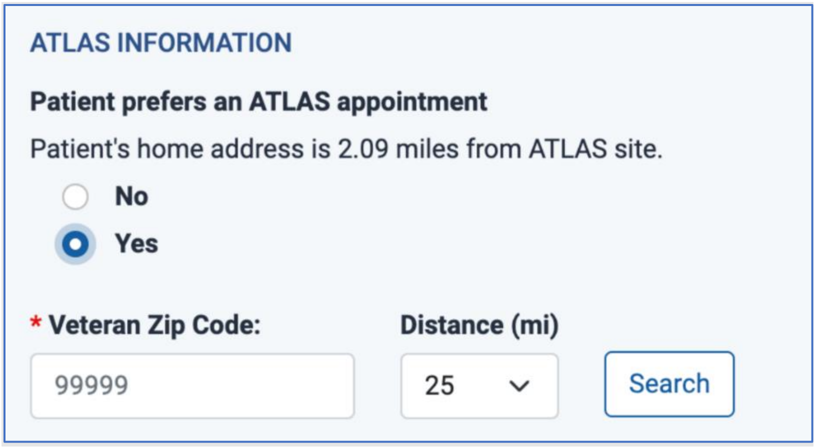
1. On the Patient information screen, select the **Create New Appointment** button to schedule a new Video Visit.
2. Indicate who is creating the appointment. The visit information form will default to the **Yes** radio-button, meaning the appointment is for you, the provider. If you are not the provider, you will choose the **No** radio button to create the appointment for someone else.
3. Indicate it will be an ATLAS appointment by choosing the **Yes** radio button. The system will default to the **No** radio-button.
4. If the patient has had an ATLAS appt in the past, then instructional text will display above the radio buttons: Veteran has used ATLAS appointments. Patient's home address is <total # of miles > miles from ATLAS site.
5. If the patient has NOT had an ATLAS appt in the past, then instructional text will display above the radio buttons: Patient's home address is <total # of miles> miles from ATLAS site.

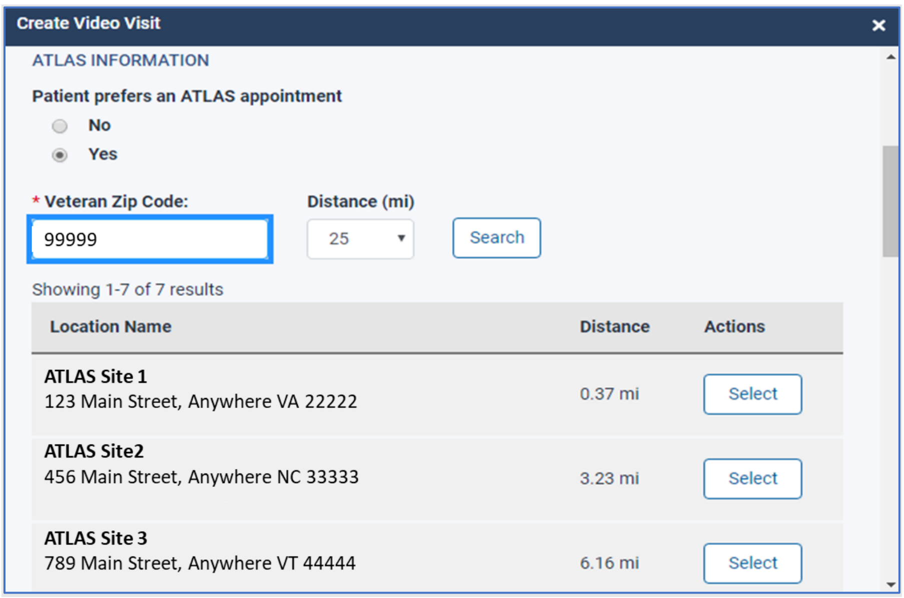
   Note: The maximum distance to search for an ATLAS site from the Veteran's home address is 50 miles. In addition, the calculation of miles will ONLY occur if EITHER of the following are true:

   - Veteran has used an ATLAS appointment in the last 24 months
   - Veteran's home address zip code is available in Mobile Profile Service
   - Sites must be Active as of current date to be considered

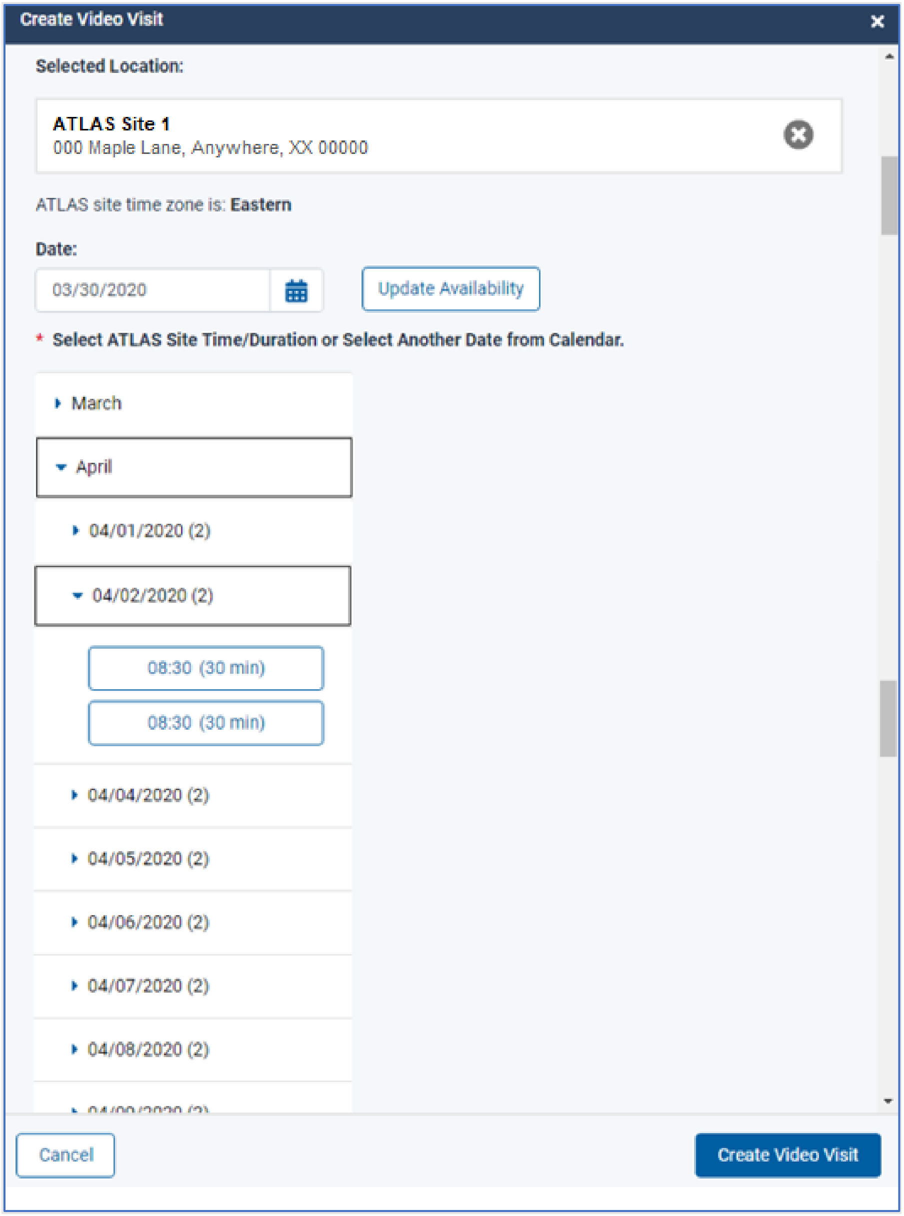






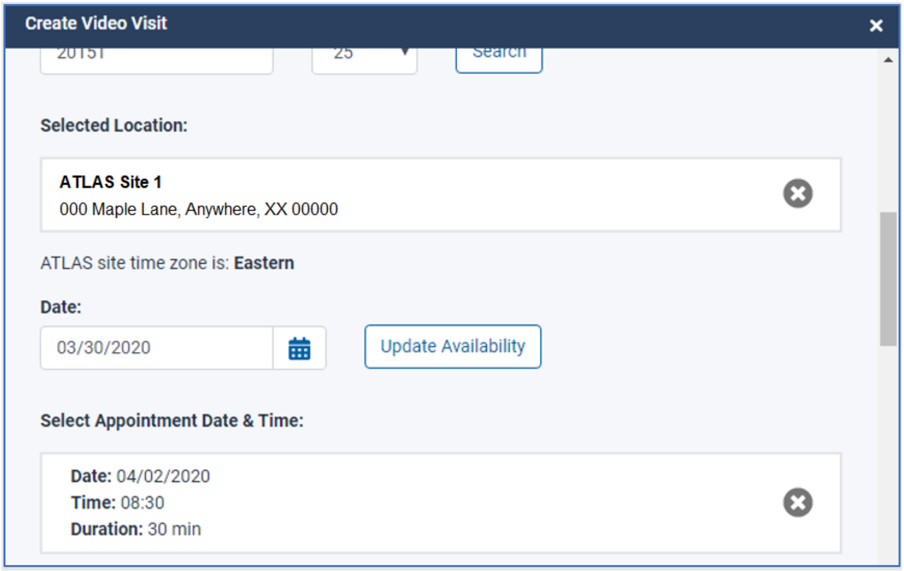


6. Identify the zip code and desired mileage range, to generate a list of providers available in the surrounding area. Select the desired location for the appointment.
7. Select a date to generate a list of ATLAS Site appointment start-times for available half-hour timeslots.

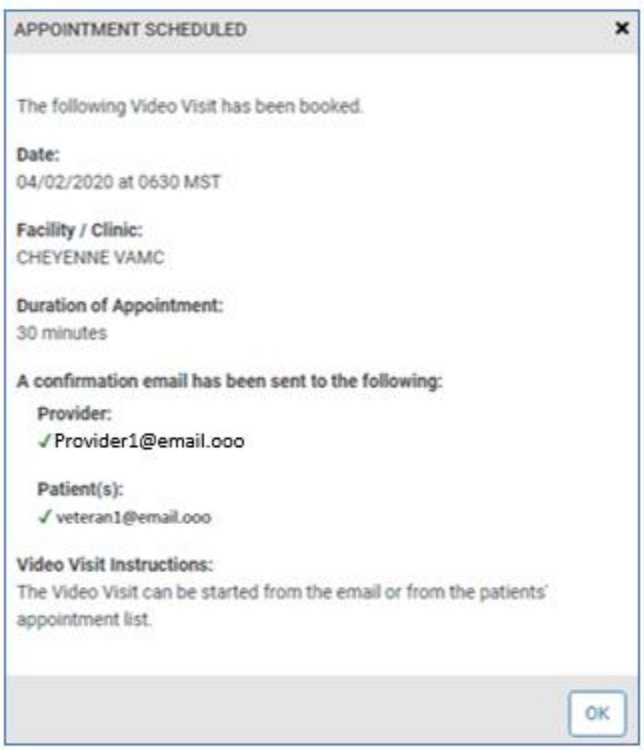


Note: If the timeslots shown for a specific date do not meet the requirements of the patient or provider, simply choose a different date, and select the **Update Availability** button to generate a fresh list of timeslot choices.

8. Choose the desired date, and verify it appears as intended.



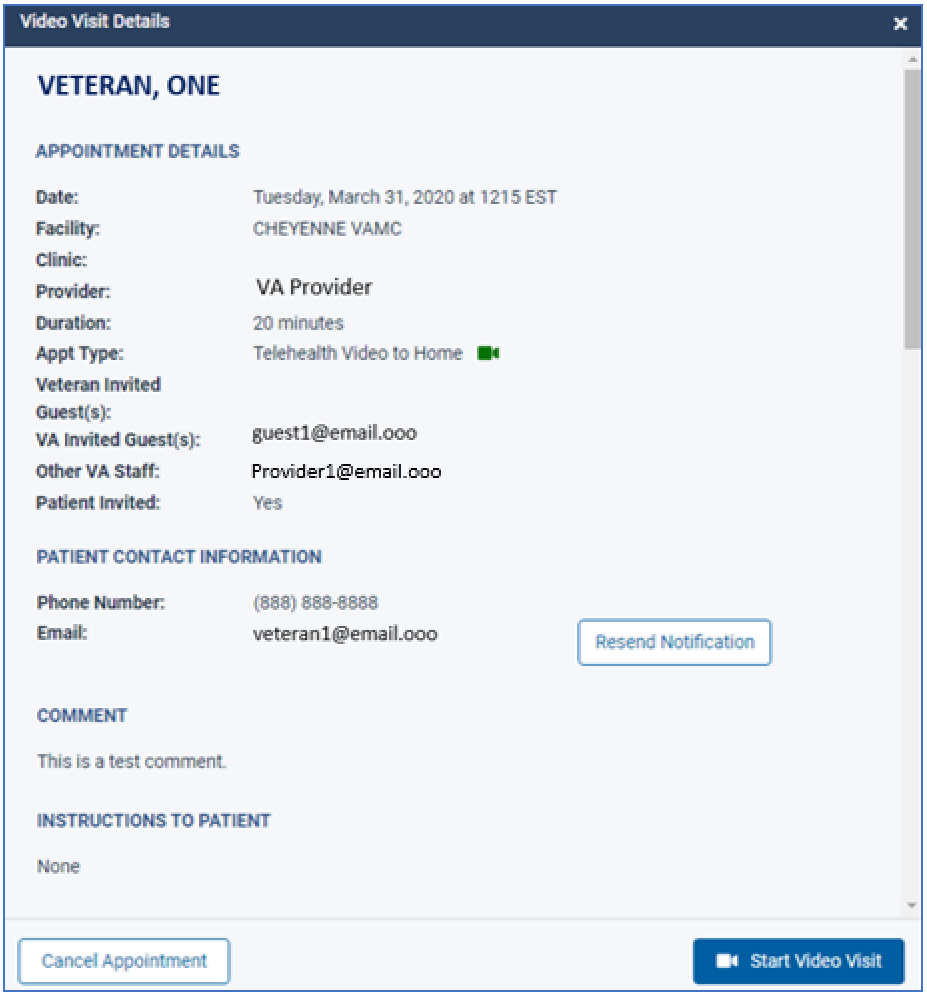
9. Select the Create Video Visit button, then confirm creation of the appointment when prompted by selecting the Yes, Create button. The appointment confirmation modal will appear.



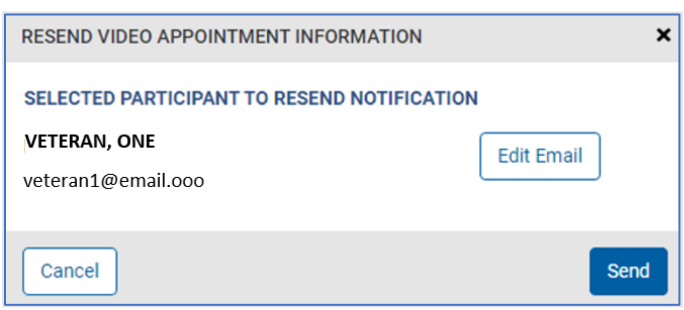
5.2.4 Resend Video Appointment Information

To resend an invitation or to adjust the email associated with a video visit appointment:

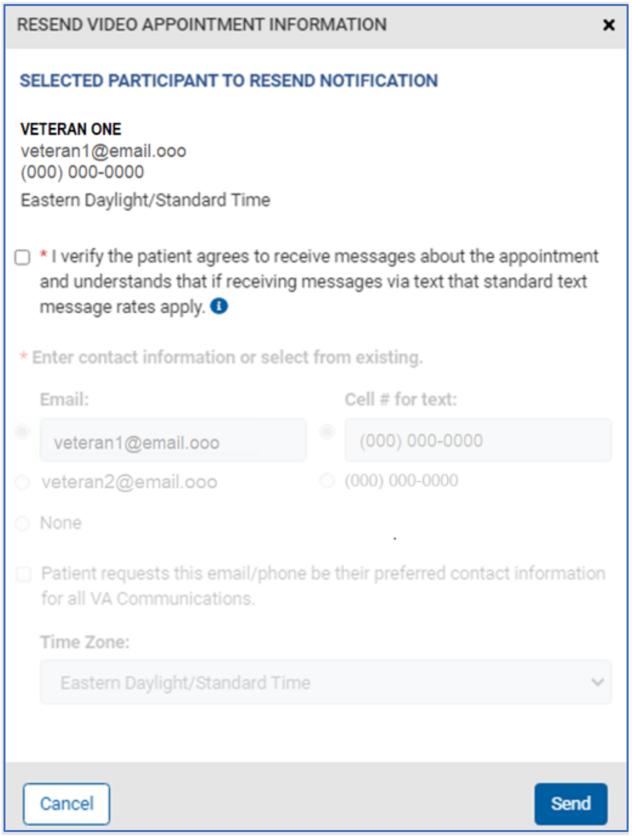
1. Access the Appointment Details view for a patient. (see Section *5.2.1 Upcoming Appointments* for more information about navigating to the screen)



2. Select the **Resend Invite/Edit Email** button for the Resend Video Appointment Information modal to appear.



3. Verify the email shown, and revise it as needed by selecting the **Edit Email** button. When changing contact information for a participant, you must verify that the patient has agreed to receive messages at the updated email and/or phone.

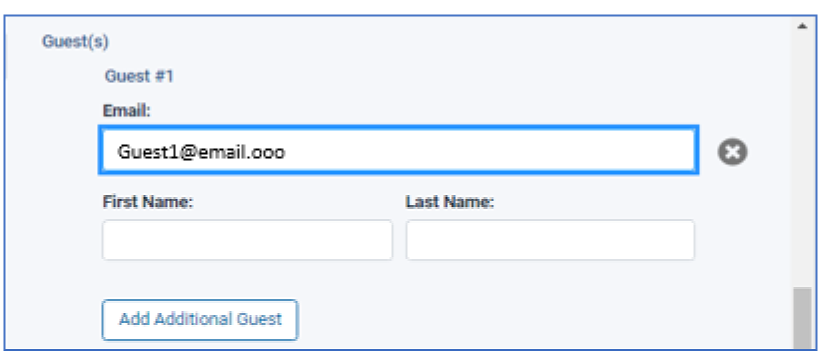


Note: Any saved modifications to the email or phone will result in the generation of a new video visit access link. The new link ensures only the intended recipient has access to the appointment.

4. On the email editing screen, verify whether the updated email should become the default record for all future Video Visits.
5. Select the **Send** button once the contact information is complete.

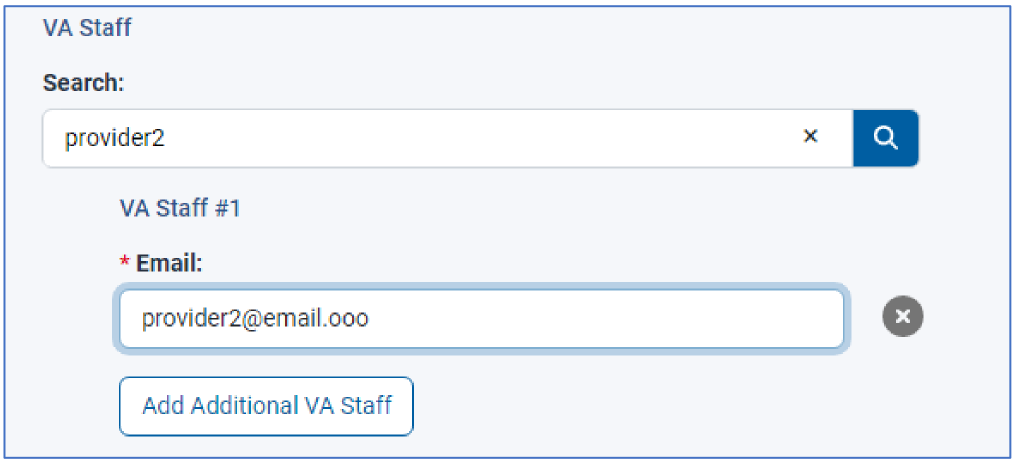
5.2.5 Guests

When creating a Video Visit for a single Veteran, Guests can be invited to participate. The Guest email is required. First and Last Name are optional. Invited Guests will receive an email Notification of the Video Visit Notification and will join the Video Visit in a Guest role. Up to 5 Guests can be invited.



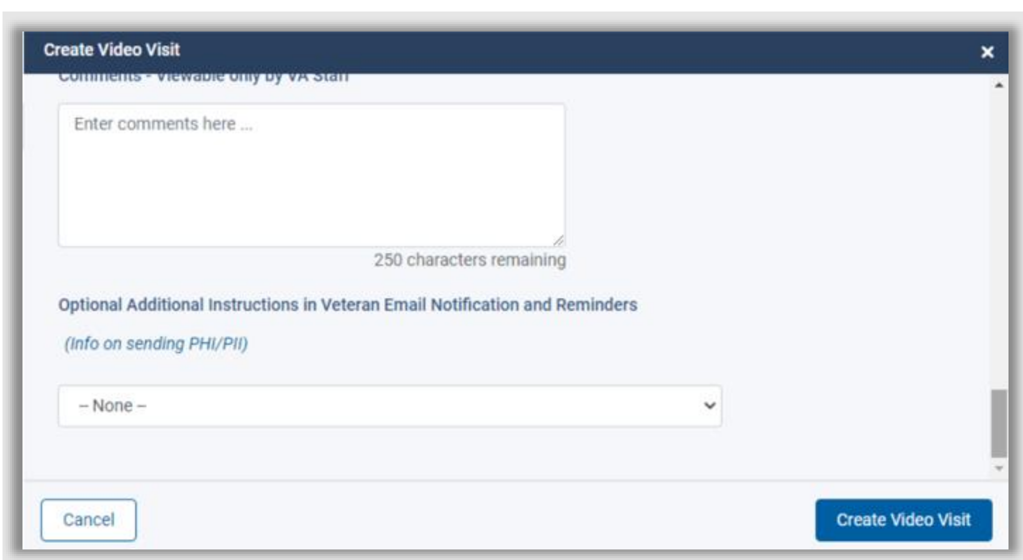
5.2.6 VA Staff

When creating a Video Visit for a single Veteran or a Group, additional VA Staff can be invited to participate. Additional VA Staff will receive an email Notification and will join the Video Visit in a Host role. Up to 5 Additional VA Staff can be invited.

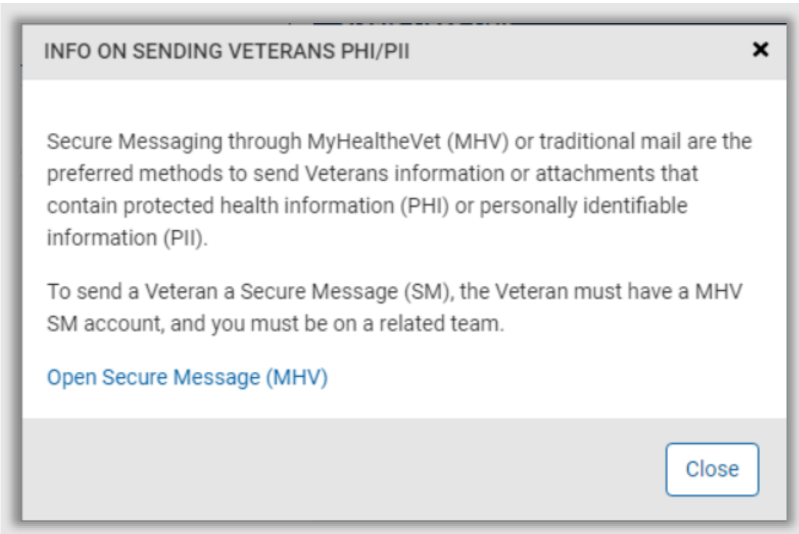


5.2.7 Additional Instructions

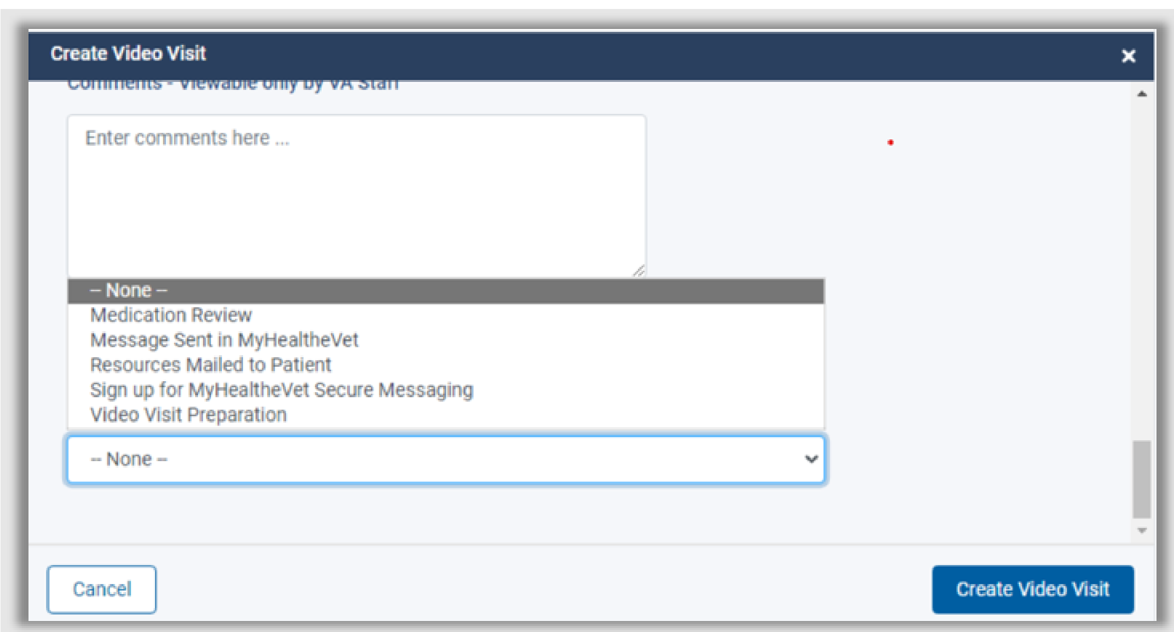
Additional Instructions are optional and will be included in the email Notification and Reminders to the Veteran if the Veteran has an email address selected in the appointment. If the Veteran does not have an email address selected for appointment notifications and reminders, the Additional Instructions field will not be displayed to the VCM user at the time of Video Visit Creation. If a VCM user selects that Additional Instructions be sent to the Veteran, these instructions will be sent to the Veteran at the point of Video Visit Creation and in their reminder emails.



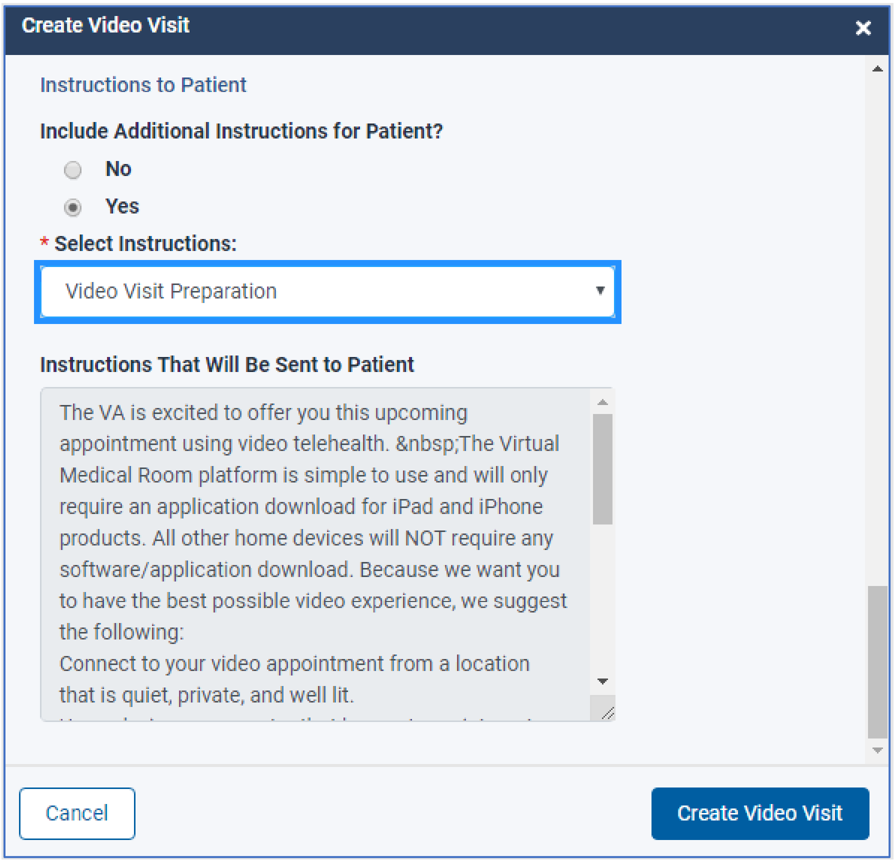
Additional Instructions have been pre-screened for PII/PHI. Free text is not enabled in Additional Instructions. This is to prevent information containing PHI/PII from being sent to the Veteran's email address. To support Virtual Care Manager users who need to send additional information to Veterans that is not included in the five Additional Instructions templates above, the VCM user will find a link to My HealtheVet secure messaging by hovering over "(Info on Sending Veterans PHI/PII)" and opening the modal below and clicking on "Open Secure Message (MHV)", or by accessing the link to My HealtheVet secure messaging from "External Links" in the top navigation bar of VCM (see Section 3 of this User Guide, "External Apps"). From both locations, My HealtheVet Secure Messaging will then open in another browser.



Options for Additional Instructions include "Medication Review", "Message Sent in My HealtheVet", "Resources Mailed to Patient", "Sign up for My HealtheVet Secure Messaging" and "Video Visit Preparation".



Below is an example of the information included in the "Video Visit Preparation" Additional Instructions template that the VCM user can review before selecting to send this information to the Veteran upon Video Visit Creation.



5.3 Patient Data

Patient data- both self-entered and from VA Electronic Health Records, can be viewed from the Patient Data tab. Among the data source(s) of self-entered patient data are: Annie, Sync My Health Data, My Health*e*Vet, and Mobile Kidney.

The following capability was developed in Virtual Care Manager to help ensure data accuracy: For any self-entered patient blood pressure data that does not include both diastolic and systolic data, the information is not reported in VCM; only blood pressure data including both diastolic and systolic values is reported in VCM.

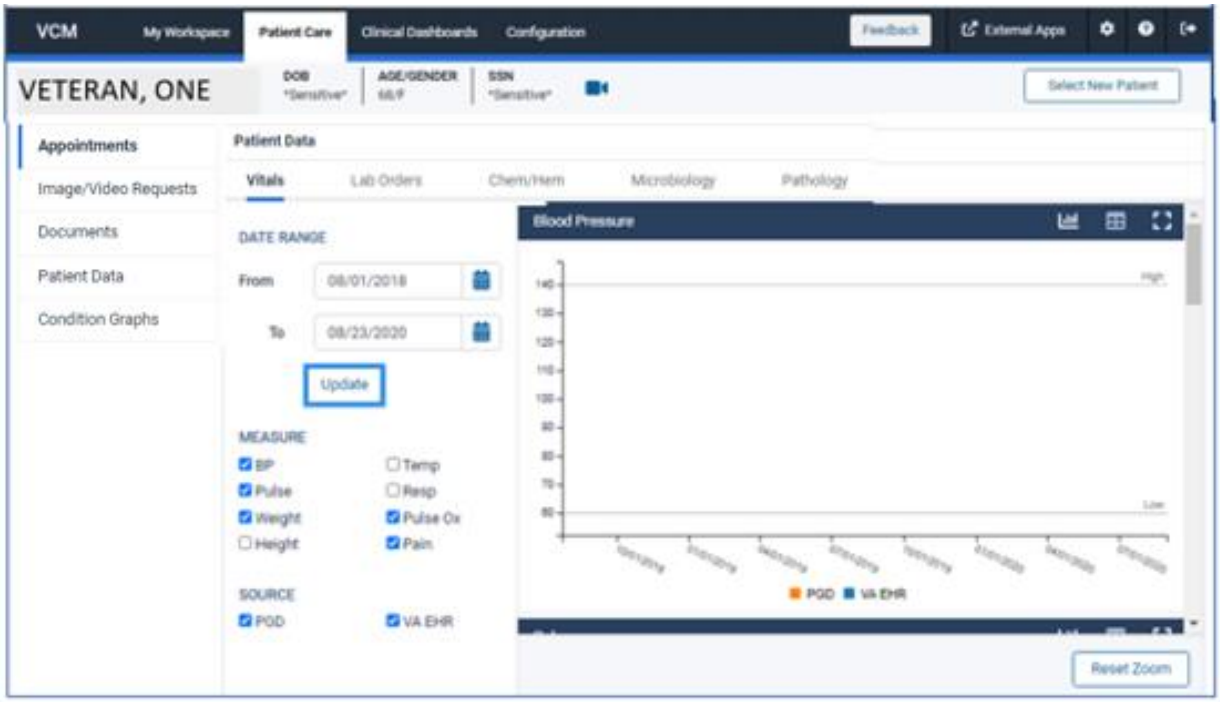
5.3.1 Vitals

The default tab for Patient Data is Vitals. When the Vitals tab is selected the data displays in the right panel if there is data to be shown. The default data view is graph.

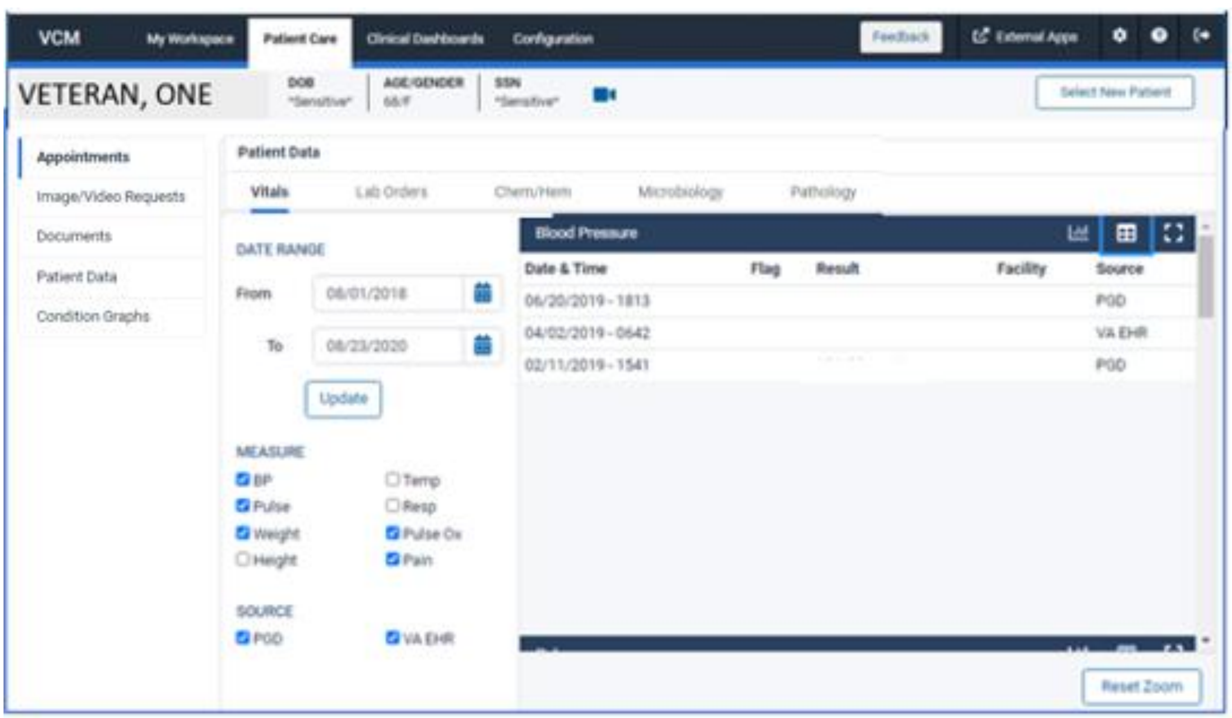
5.3.1.1 Vitals Filters

The default date range is from two weeks prior to the current date, through the current date. Vitals Measures are selectable from the filter on the left panel. The default measures are Blood Pressure, Pulse, Weight, Pulse Oximetry, and Pain. There are two potential sources of Vitals data; PGD (Patient Generated Data) and EHR. Both are selected by default.

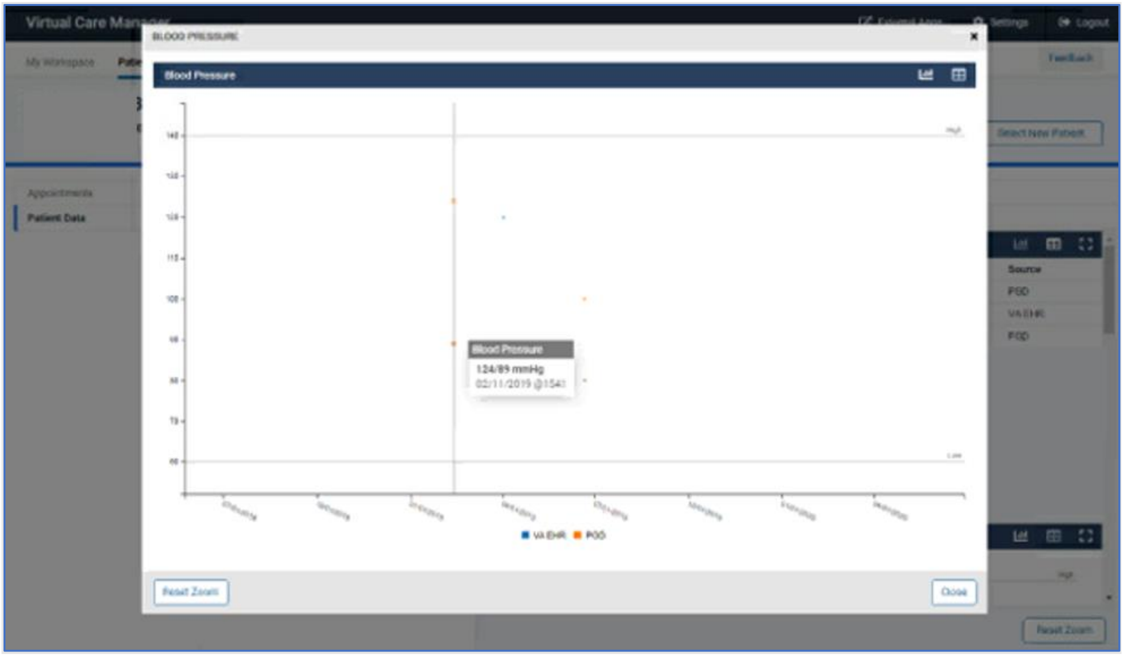
The date and time for each set of Patient Data displays in the user's browser time zone.



There is an option on each graph header to change the display to a table view.



There is also an option on each graph header to change the display to a full screen view.

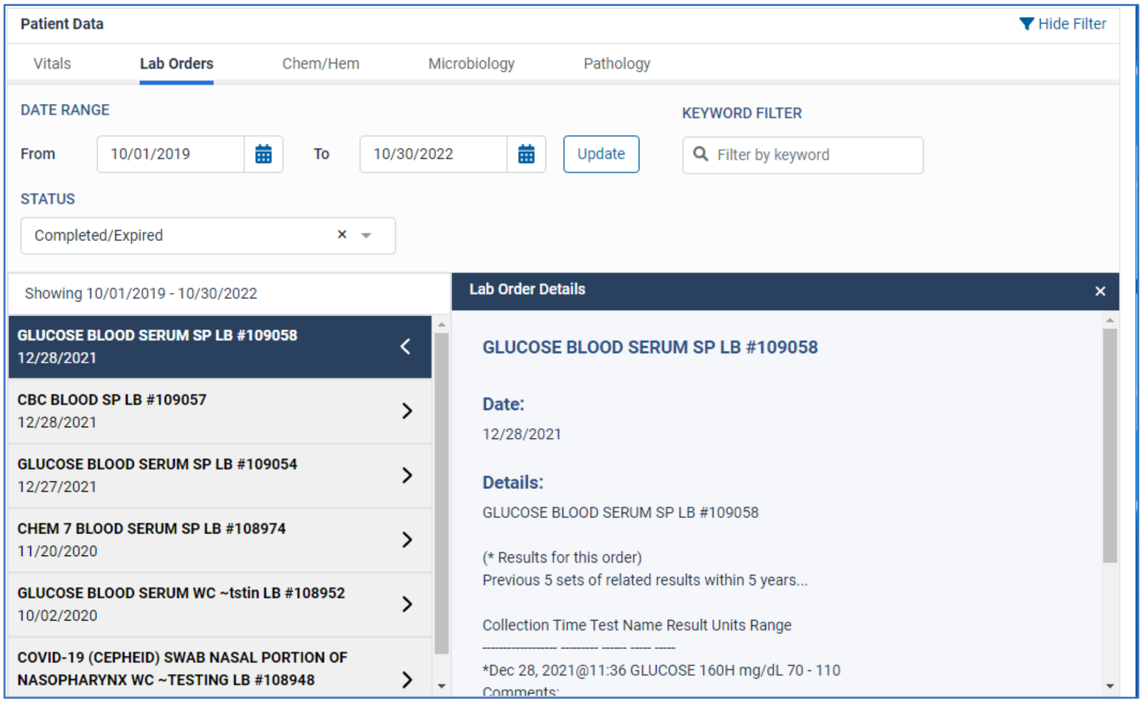


5.3.2 Lab Orders

There is an option in Patient Data to view Lab Order information. When the Lab Orders tab is selected the data displays in the right panel if there is data. The default data view is graph.

5.3.2.1 Lab Orders Filters

The default date range is from one month prior to the current date, through the current date. Lab Order titles are selectable from the filter section by keyword. The Lab Orders list view displays all lab order results by title with the date of the last result listed below. Selecting a row from the list view opens a display of the details of that lab order.

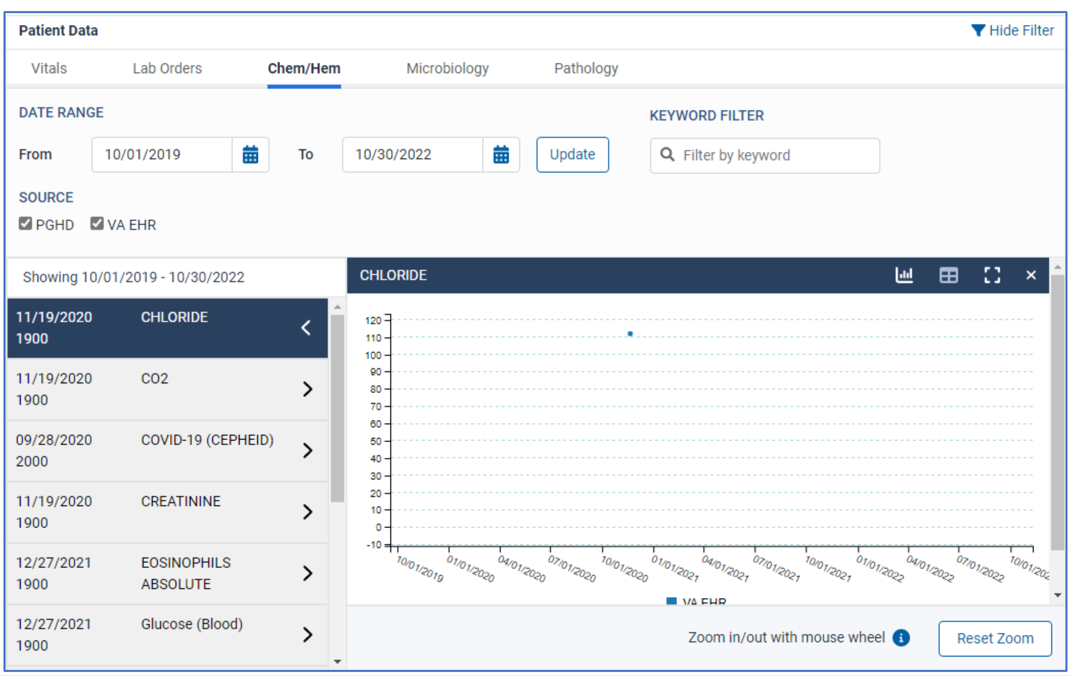


5.3.3 Chem/Hem

There is an option in Patient Data to view Chem/Hem data. When Chem/Hem is selected, Chem/Hem results display in the list view. The list view is sorted alphabetically, with the date and time of the latest result displayed.

5.3.3.1 Filters

The default date range is from one month prior to the current date, through the current date. Chem/Hem test titles are selectable from the filter section by keyword. The Lab Orders list view displays all lab order results by title with the date of the last result listed below. Selecting a row from the list view opens a display of the details of that lab order.



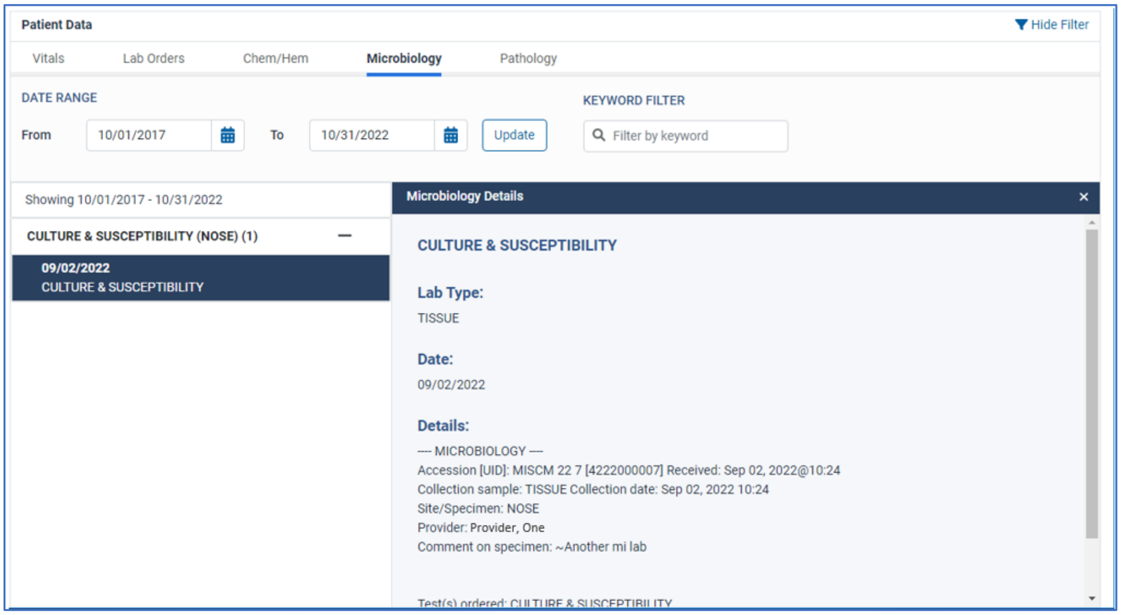
There is an option on each graph header to change the display to a table view. There is also an option to make the graph or table full screen.

5.3.4 Microbiology

There is an option in Patient Data to view Microbiology information. When the Microbiology tab is selected the data displays in the right panel if there is data. The default data view is graph.

5.3.4.1 Microbiology Filters

The default date range is from one month prior to the current date, through the current date. Microbiology titles are selectable from the filter section by keyword. The Microbiology list view displays all Microbiology results by title with the date of the last result listed below. Selecting a row from the list view opens a display of the details of that lab order.

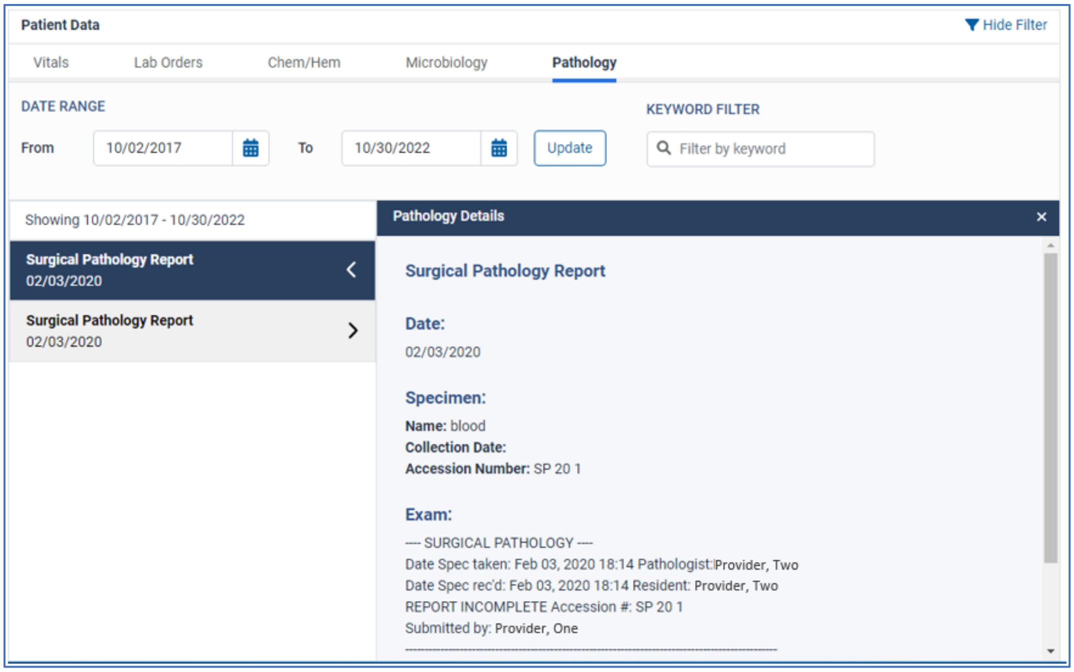


5.3.5 Pathology

There is an option in Patient Data to view Pathology information. When the Pathology tab is selected the data displays in the right panel if there is data. The default data view is graph.

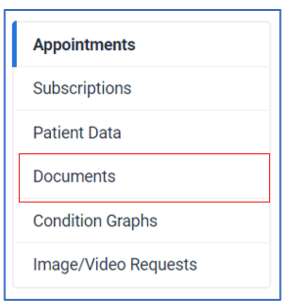
5.3.5.1 Pathology Filters

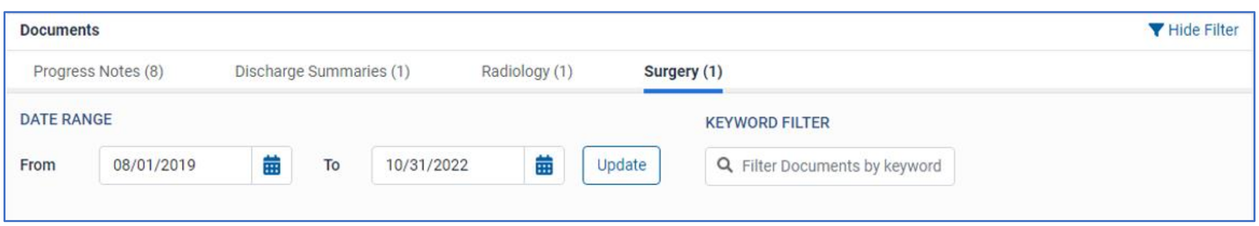
The default date range is from one month prior to the current date, through the current date. Pathology titles are selectable from the filter section by keyword. The Pathology list view displays all Pathology results by title with the date of the last result listed below. Selecting a row from the list view opens a display of the details of that lab order.



5.4 Documents

From the Documents tab in Patient Care, the following information can be accessed for a specific Veteran: Progress Notes, Discharge Summaries, Radiology reports, Surgery reports.



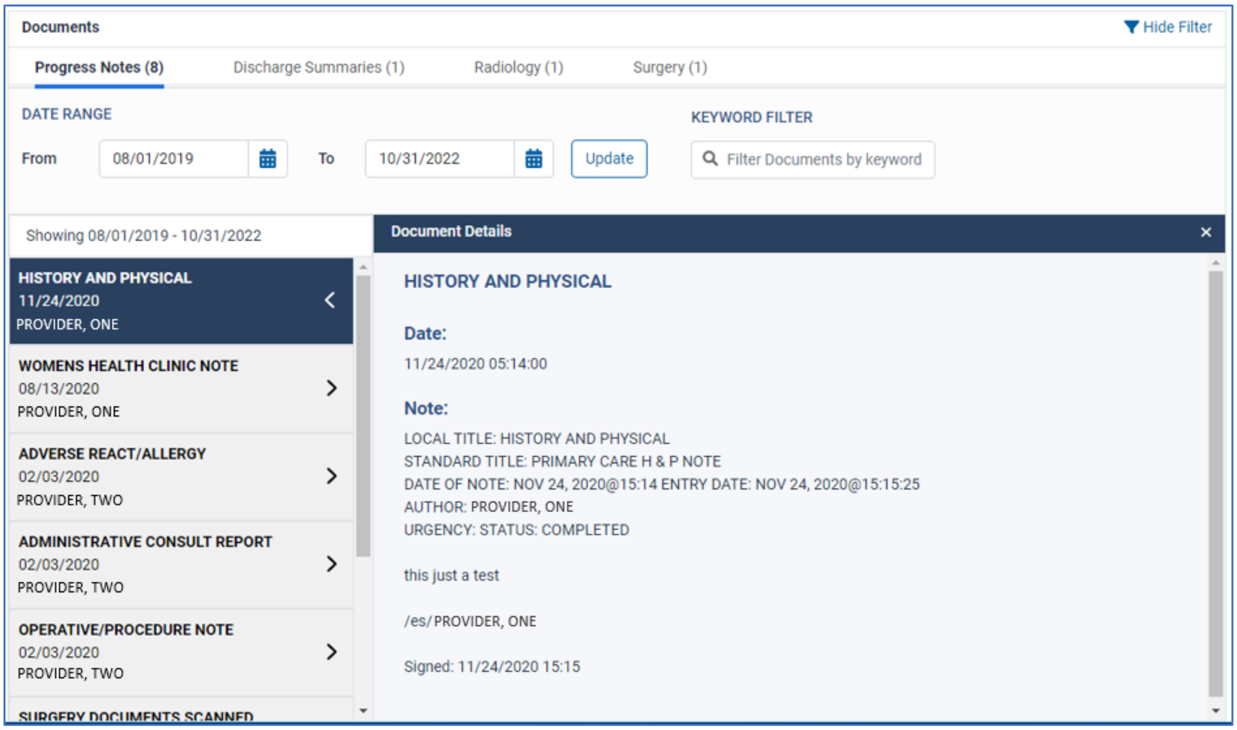


The information found in Documents is from VA Electronic Health Records. The number in parentheses after each label in Documents indicates the number of reports available for the Veteran in context for the specific date range selected in the filter. In the example above, there are eight Progress Notes available for the Veteran for the selected period of time.

Once a specific type of Document is selected, a list of reports available appears in List View (see examples below). Clicking the carrot/arrow for any report in List View will open the Document Details for the selected report. To close Document Details, click on the carrot/arrow once more in List View or select and open Document Details for another report in List View. Search for a specific report by using the Keyword Filter to display reports in List View that contain a particular word or term. Once a word has been searched for using the Keyword Filter, only reports containing that particular word or term will display in List View for the selected timeframe. See examples below for Progress Notes, Discharge Summaries, Radiology reports and Surgery reports.

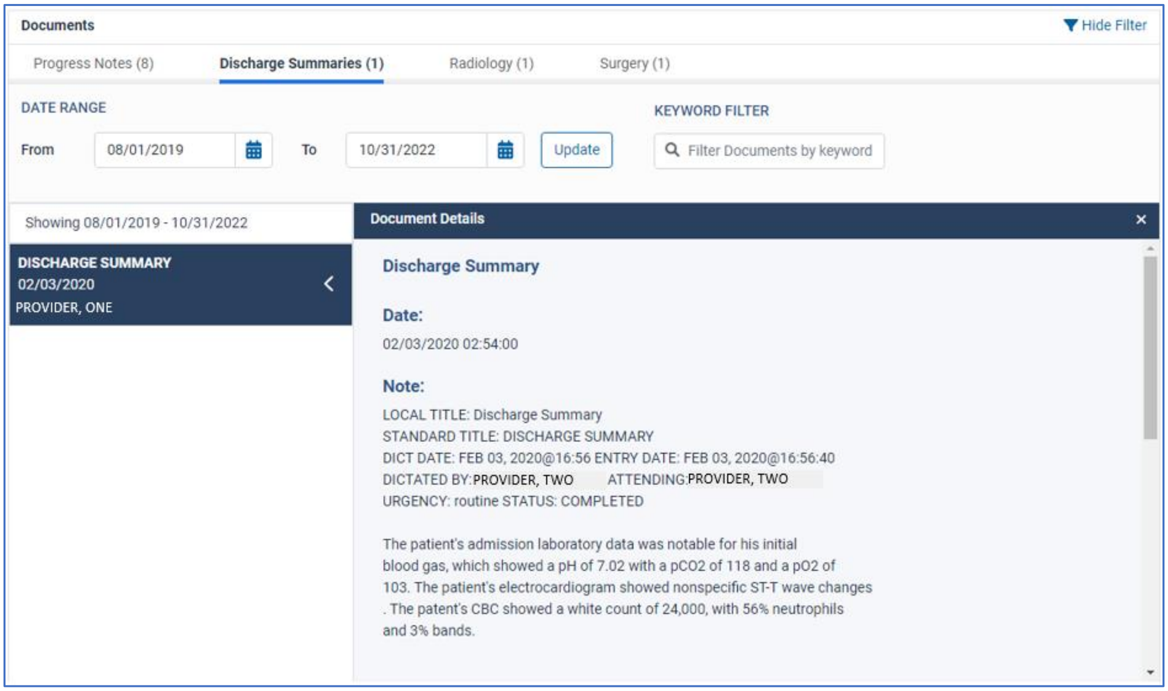
5.4.1 Progress Notes

Select the Progress Notes label within Documents to view Progress Reports from VA Electronic Health Records for a specific Veteran.



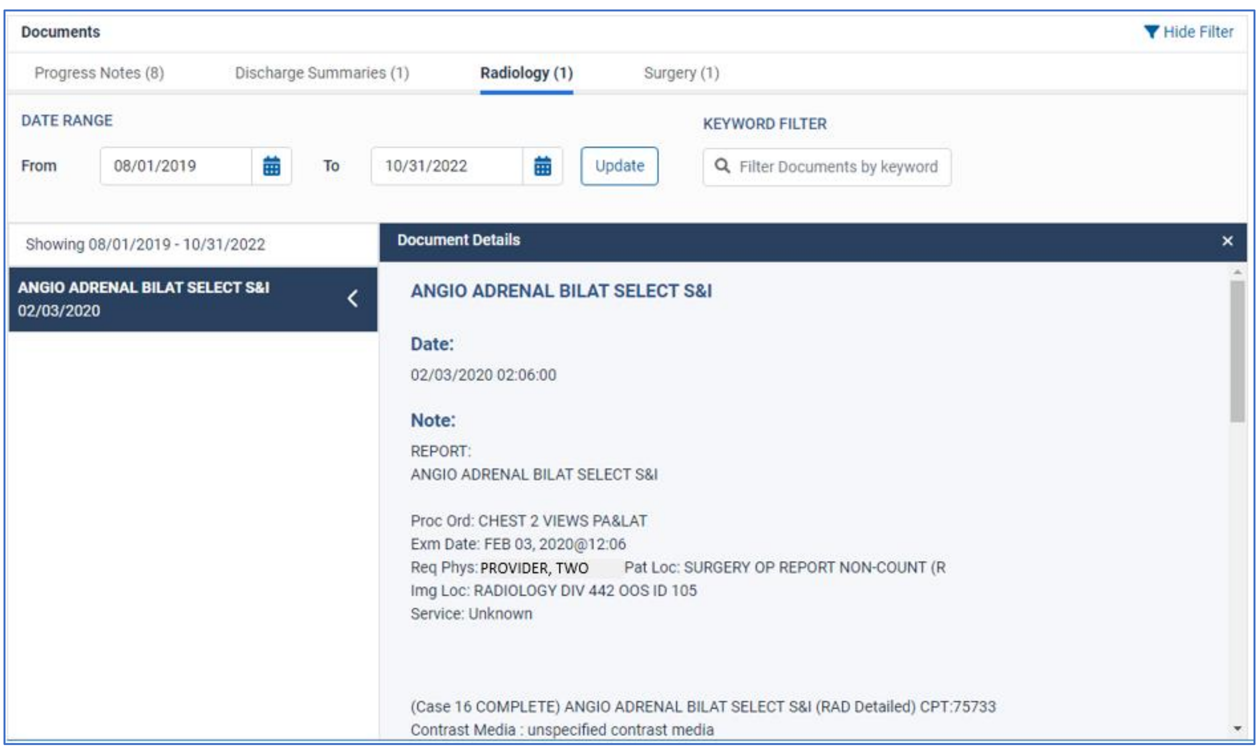
5.4.2 Discharge Summaries

Select the Discharge Summaries label within Documents to view Discharge Summaries from VA Electronic Health Records for a specific Veteran.



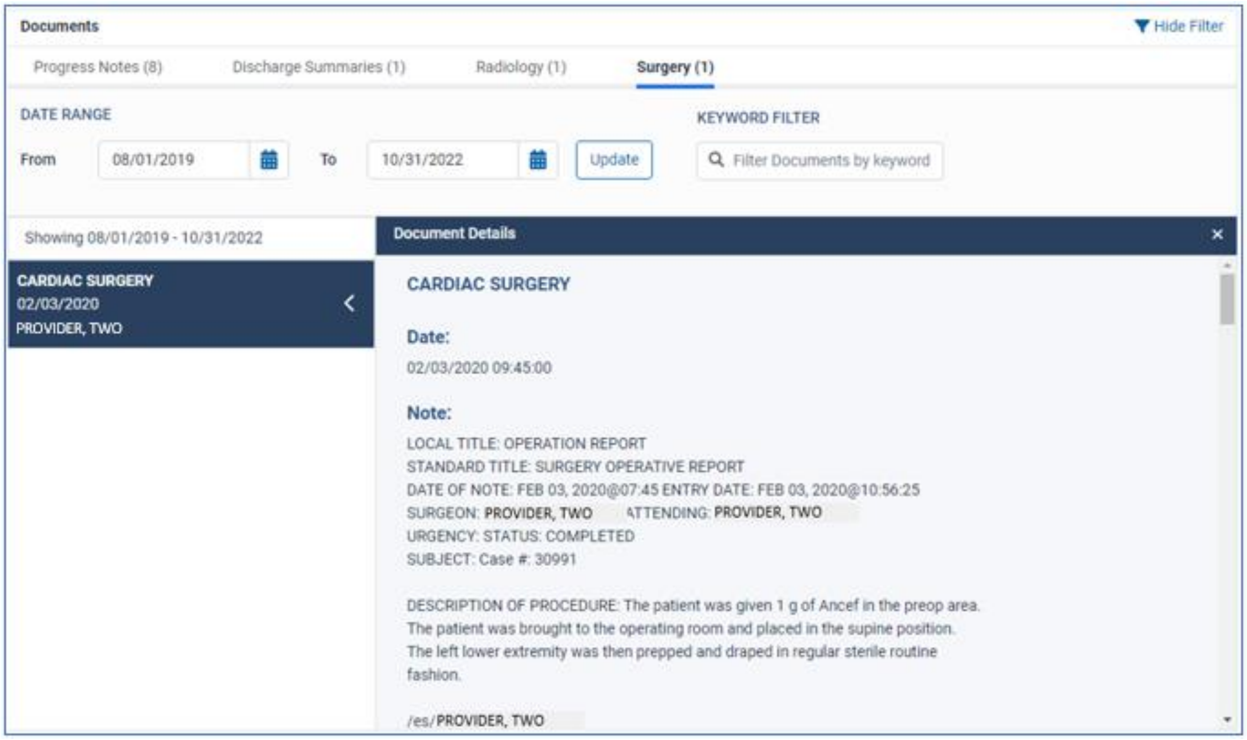
5.4.3 Radiology

Select the Radiology label within Documents to view Radiology reports from VA Electronic Health Records for a specific Veteran.



5.4.4 Surgery

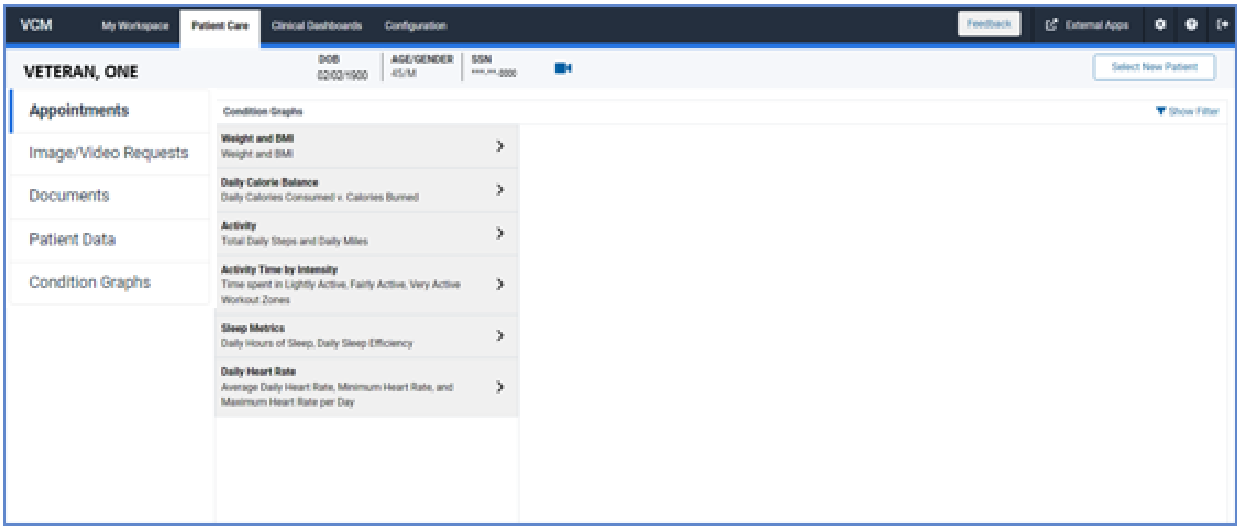
Select the Surgery label within Documents to view Surgery reports from VA Electronic Health Records for a specific Veteran.


Documents
Hide Filter
Progress Notes (8)
Discharge Summaries (1)
Radiology (1)
Surgery (1)
DATE RANGE
From
08/01/2019
To
10/31/2022
Update
KEYWORD FILTER
Filter Documents by keyword
Showing 08/01/2019 - 10/31/2022
CARDIAC SURGERY
02/03/2020
PROVIDER, TWO
Document Details
CARDIAC SURGERY
Date:
02/03/2020 09:45:00
Note:
LOCAL TITLE: OPERATION REPORT
STANDARD TITLE: SURGERY OPERATIVE REPORT
DATE OF NOTE: FEB 03, 2020@07:45 ENTRY DATE: FEB 03, 2020@10:56:25
SURGEON: PROVIDER, TWO ATTENDING: PROVIDER, TWO
URGENCY: STATUS: COMPLETED
SUBJECT: Case #: 30991
DESCRIPTION OF PROCEDURE: The patient was given 1 g of Ancef in the preop area.
The patient was brought to the operating room and placed in the supine position.
The left lower extremity was then prepped and draped in regular sterile routine
fashion.
/es/ PROVIDER, TWO

5.5 Condition Graphs

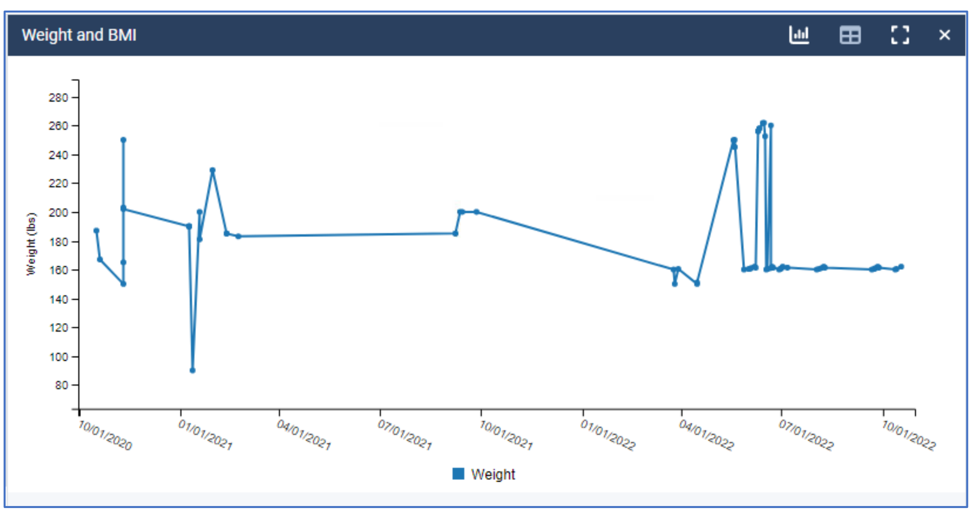
Condition Graphs from Patient Care offer views specific to patient conditions based on data submitted via other VA Applications like Sync My Health Data.

When Condition Graphs is selected, the Condition Graphs options display in the List View. The default view for Condition Graphs is from two weeks before the current date to the current date. The filter can be hidden by selecting the Hide Filter text or icon.



5.5.1 Weight and BMI

The Weight and BMI graph provides a view of the patient's daily weigh-ins. Body mass index (BMI) calculation is available from hover and in the table view.



The Weight and BMI data table provides a detailed view of the patient's daily weigh-ins and body mass index (BMI) calculation data.

Weight and BMI

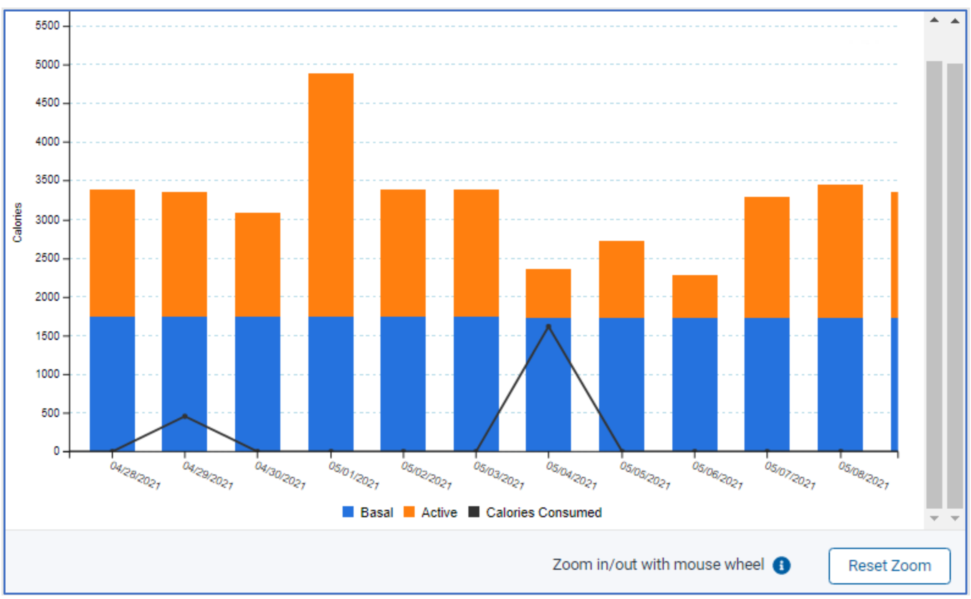
Date	BMI	Weight (lbs)	Height (inches)	App/Device
02/22/2021	NA	183	NA	MobileKidney
02/11/2021	28.1	185	NA	Sync My Health Data
01/30/2021	NA	229	NA	Sync My Health Data
01/18/2021	NA	200	69	Sync My Health Data
01/12/2021	NA	90	NA	MobileKidney
01/08/2021	28.9	190	NA	Sync My Health Data
11/09/2020	30.7	250	1	Sync My Health Data
10/19/2020	NA	167	NA	Annie
10/16/2020	NA	187	NA	Annie

Consistent with the Patient Data graphs, there is an option on each graph to view the data in a table by selecting the table icon. Graph views can be zoomed in using the mouse roller. The button at the bottom right of the graph resets the zoom.

Graph legends can be selected to display or hide data displayed in the graph.

5.5.2 Daily Calorie Balance

The Daily Calorie Balance graph provides a view of the patient's daily caloric balance.



The Daily Calorie Balance data table provides a detailed view of the patient's daily caloric balance data.

Daily Calorie Balance

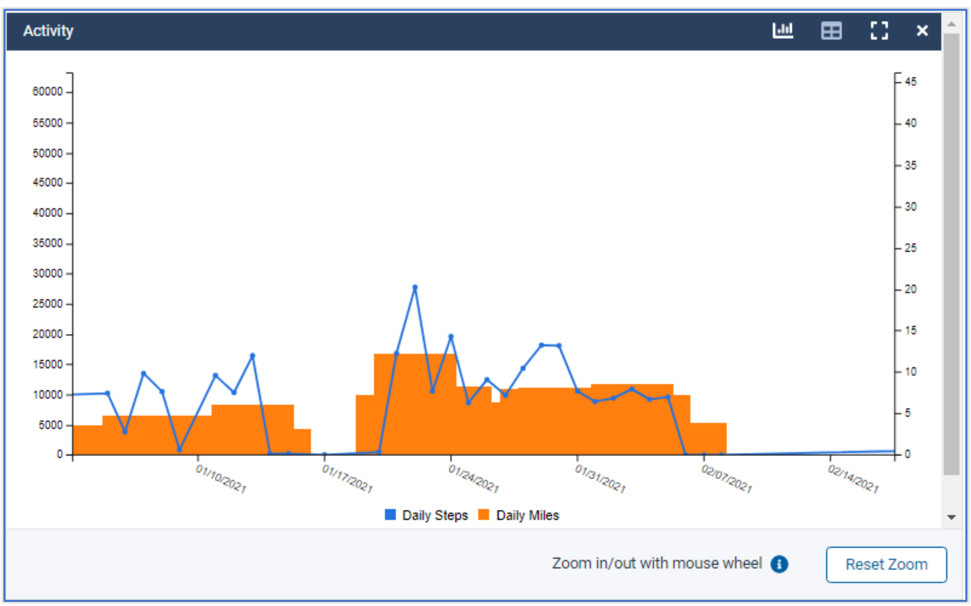
Date	Calories Balance	Calories Consumed	Calories Burned	Basal Calories	Active Calories	App/Device
02/16/2021	-439	0	439	0	0	Sync My Health Data 2
02/15/2021	-633	0	633	0	0	Sync My Health Data 2
02/14/2021	-590	0	590	0	0	Sync My Health Data 2
02/13/2021	-552	140	692	0	0	Sync My Health Data 2
02/12/2021	-485	206	691	0	0	Sync My Health Data 2
02/11/2021	-1753	0	1753	0	0	Sync My Health Data 2
02/10/2021	-1738	0	1738	0	0	Sync My Health Data 2
02/09/2021	-1248	0	1248	0	0	Sync My Health Data 2
02/08/2021	-780	0	780	0	0	Sync My Health Data 2
02/07/2021	-1753	0	1753	0	0	Sync My Health Data 2
02/06/2021	-1753	0	1753	0	0	Sync My Health Data 2

Consistent with the Patient Data graphs, there is an option on each graph to view the data in a table by selecting the table icon. Graph views can be zoomed in using the mouse roller. The button at the bottom right of the graph resets the zoom.

Graph legends can be selected to display or hide data displayed in the graph.

5.5.3 Activity

The Activity graph provides a view of the patient's daily total steps and distance. Daily Miles is displayed as a bar with the Daily Steps displayed as a line graph.



The Activity data table provides a detailed view of the patient's daily activity data.

Activity

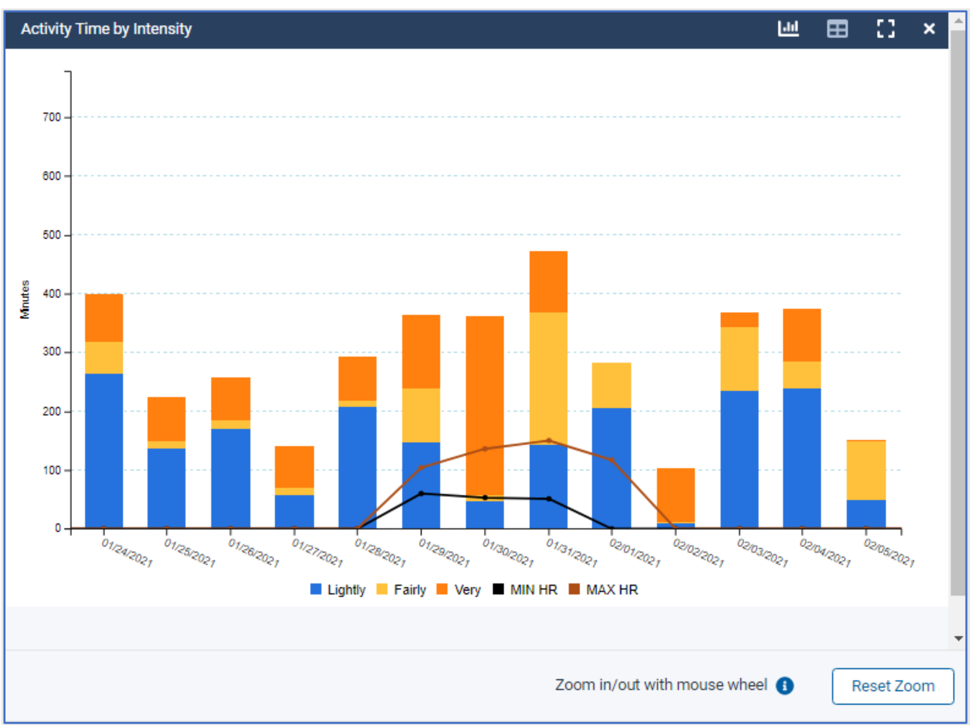
Date	Daily Steps	Daily Miles	App/Device
08/01/2021	0	2.3	Sync My Health Data 2
07/31/2021	0	0.2	Sync My Health Data 2
07/30/2021	0	0	Sync My Health Data 2
07/30/2021	0	2.5	Sync My Health Data 2
07/29/2021	0	0	Sync My Health Data 2
07/29/2021	0	2	Sync My Health Data 2
07/29/2021	0	0	Sync My Health Data 2
07/28/2021	0	2.5	Sync My Health Data 2
07/28/2021	0	0	Sync My Health Data 2
07/28/2021	0	3.7	Sync My Health Data 2
07/27/2021	0	0	Sync My Health Data 2
07/27/2021	0	2.1	Sync My Health Data 2

Consistent with the Patient Data graphs, there is an option on each graph to view the data in a table by selecting the table icon. Graph views can be zoomed in using the mouse roller. The button at the bottom right of the graph resets the zoom.

Graph legends can be selected to display or hide data displayed in the graph.

5.5.4 Activity Time by Intensity

The Activity Time by Intensity graph provides a view of the patient's daily activity intensity and the length of time that intensity was maintained.



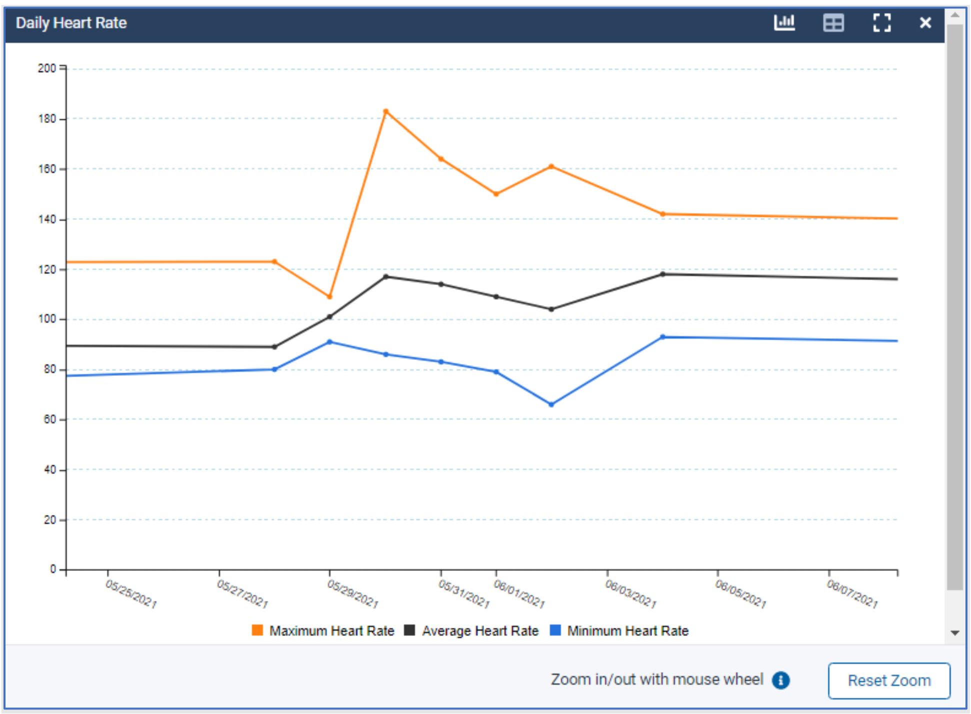
The Activity Time by Intensity data table provides a detailed view of the patient's daily activity intensity data, and the length of time that intensity was maintained.

Activity Time by Intensity

Date	Total (min)	Lightly (min)	Fairly (min)	Very (min)	Min HR	Max HR	App/Device
05/15/2021	70	6	30	34	0	0	Sync My Health Data 2
05/15/2021	74	10	30	34	0	0	Sync My Health Data 2
05/11/2021	28	2	4	22	0	0	Sync My Health Data 2
05/11/2021	34	7	5	22	0	0	Sync My Health Data 2
04/09/2021	36	3	8	25	0	0	Sync My Health Data 2
03/28/2021	22	7	12	3	0	0	Sync My Health Data 2
03/28/2021	45	4	19	22	0	0	Sync My Health Data 2
03/27/2021	26	5	6	15	0	0	Sync My Health Data 2
03/16/2021	92	0	92	0	0	0	Sync My Health Data 2
03/15/2021	90	0	90	0	0	0	Sync My Health Data 2
03/14/2021	82	0	82	0	0	0	Sync My Health Data 2
03/13/2021	45	0	45	0	0	0	Sync My Health Data 2

5.5.5 Daily Heart Rate

The Daily Heart Rate graph provides a view of the patient's daily Maximum, Average, and Minimum Heart Rate as a line graph.



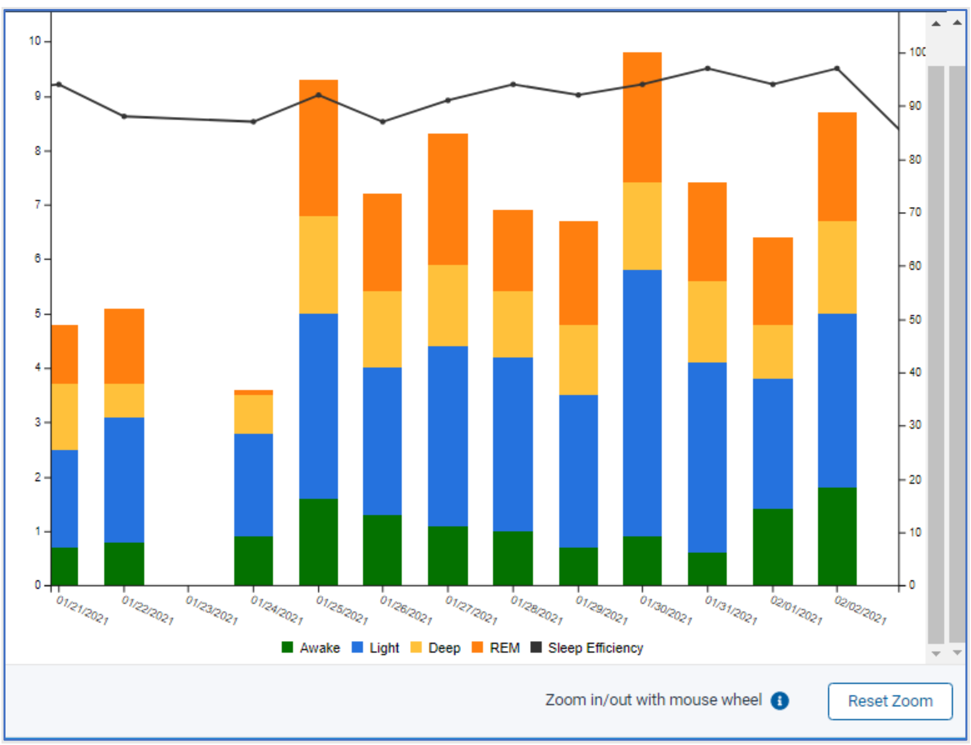
The Daily Heart Rate data table provides a detailed view of the patient's daily Maximum, Average, and Minimum Heart Rate data.

Daily Heart Rate

Date	Maximum Heart Rate	Average Heart Rate	Minimum Heart Rate	App/Device
05/15/2021	0	112	0	Sync My Health Data 2
05/11/2021	0	127	0	Sync My Health Data 2
04/09/2021	0	119	0	Sync My Health Data 2
03/28/2021	0	115	0	Sync My Health Data 2
03/28/2021	0	113	0	Sync My Health Data 2
03/27/2021	0	117	0	Sync My Health Data 2
02/16/2021	64	64	64	Sync My Health Data 2
02/11/2021	104	65	47	Sync My Health Data 2
02/11/2021	125	111	0	Sync My Health Data 2
02/11/2021	71	69	0	Sync My Health Data 2
02/10/2021	122	73	54	Sync My Health Data 2
02/10/2021	0	103	0	Sync My Health Data 2

5.5.6 Sleep Metrics

The Sleep Metrics graph provides a view of the patient's daily sleep pattern. Sleep metrics of Awake, Light, Deep, and REM are displayed as a stacked bar, with the sleep score displayed as a line graph.



The Sleep Metrics data table provides a detailed view of the patient's daily sleep pattern data.

Sleep Metrics

Date	Total Sleep (hrs)	Sleep Efficiency	Awake (hrs)	REM (hrs)	Deep (hrs)	Light (hrs)	App/Device
08/24/2022	5.4	95	1.1	1.8	0.6	3	Sync My Health Data 2
08/24/2022	2.7	95	0	0	0	0	Sync My Health Data 2
08/23/2022	3.3	87	0.7	0.4	0.6	2.3	Sync My Health Data 2
08/22/2022	5	88	0.8	1.5	1	2.6	Sync My Health Data 2
08/18/2022	2.8	95	0	0	0	0	Sync My Health Data 2
08/17/2022	2.9	90	0.4	0.9	0.8	1.2	Sync My Health Data 2
08/17/2022	2.8	95	0	0	0	0	Sync My Health Data 2
08/16/2022	4.9	86	0.7	1.4	0.6	2.9	Sync My Health Data 2
08/15/2022	3	93	0.5	0.5	0.3	2.2	Sync My Health Data 2
08/15/2022	2.1	0	0	0	0	0	Sync My Health Data 2
08/15/2022	0.2	0	0	0	0	0	Sync My Health Data 2
08/15/2022	0	0	0	0	0	0	Sync My Health Data 2

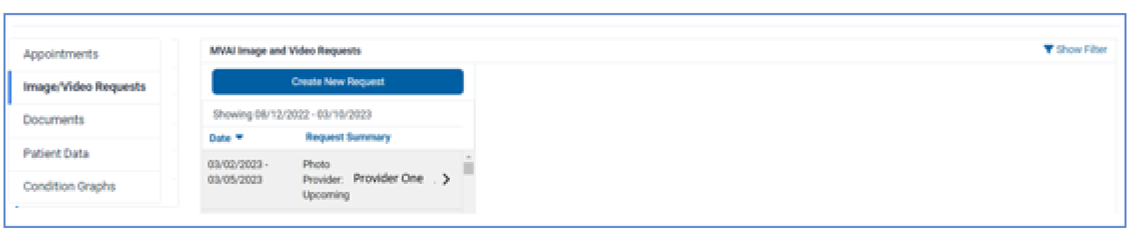
Consistent with the Patient Data graphs, there is an option on each graph to view the data in a table by selecting the table icon. Graph views can be zoomed in using the mouse roller. The button at the bottom right of the graph resets the zoom.

Graph legends can be selected to display or hide data displayed in the graph.

5.6 Requests to Patients

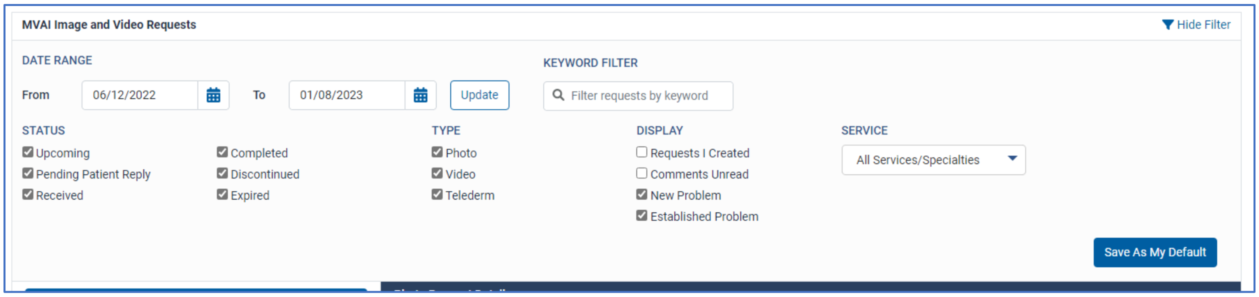
Requests to Patients allows the creation of a new single or recurring Photo, Video or Telederm Request from the VCM user to a Veteran and allows the VCM user to search for Requests that have already been submitted to Veterans.

Select “Create New Request” to create a new request for the Veteran/patient in context. Options include Photo and Video Requests. If not restricted, the user has the option to create a Telederm Request (image further below shows Telederm option). Submitting a Photo Request will be used as an example. Note: The Telederm Request is a different workflow from Photo and Video Requests and is provided in detail in section **5.6.1 Telederm Requests to Patients.**

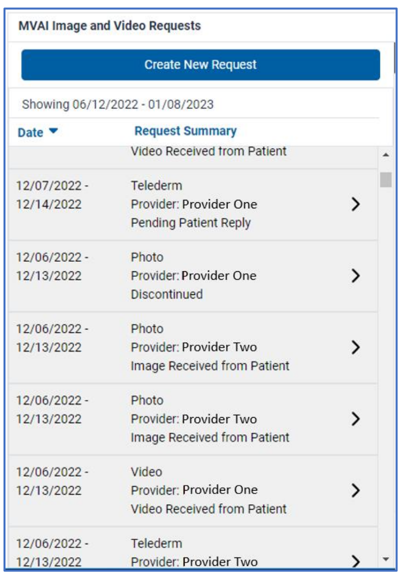


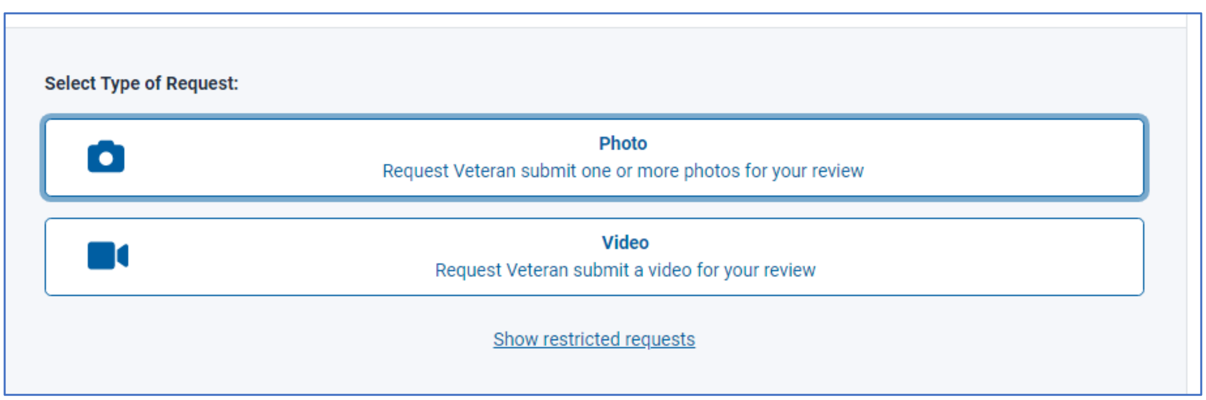
Selecting “Show/Hide Filter” allows the user to display filters to support the search for a previously submitted Request. Filters include date range of the Request, as well as Status, Type (Photo, Video or Telederm), the option to display “Requests I Created”, Service/Specialty, as well as the option to filter by keyword to further narrow the search. All filters are optional, but selecting a number of filters may help narrow the search.

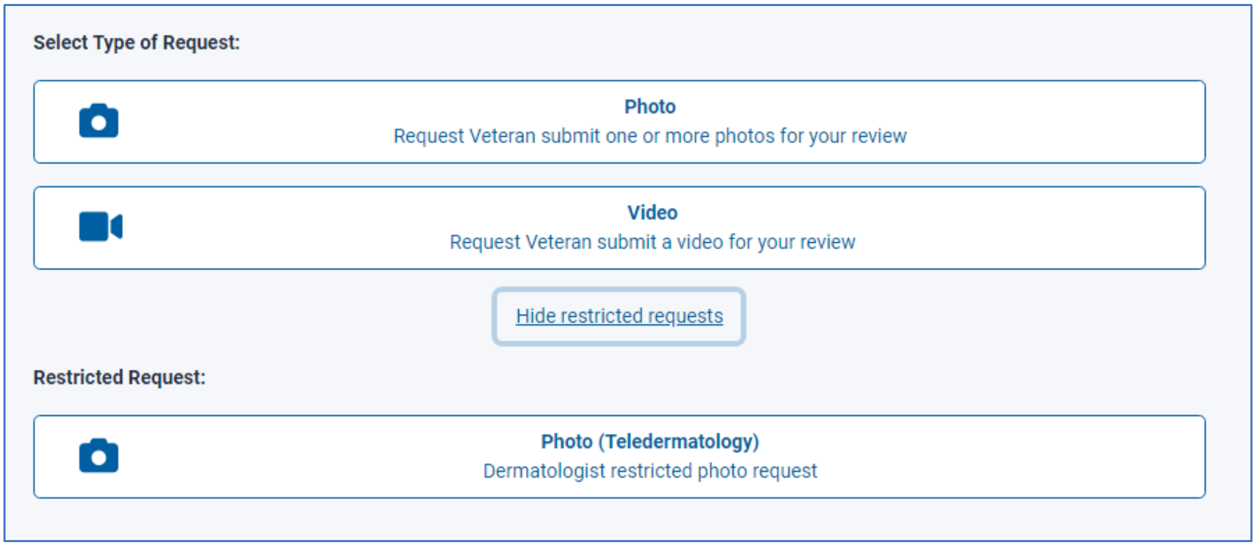
To customize a filter set to see preferred requests by default, select the Status, Type(s), Display and Service/Specialty, then select "Save As My Default". These filters will be saved as default for the user and when they return to Image and Video Requests in Patient Care, the image requests in the list view will be based on these saved filter selections.



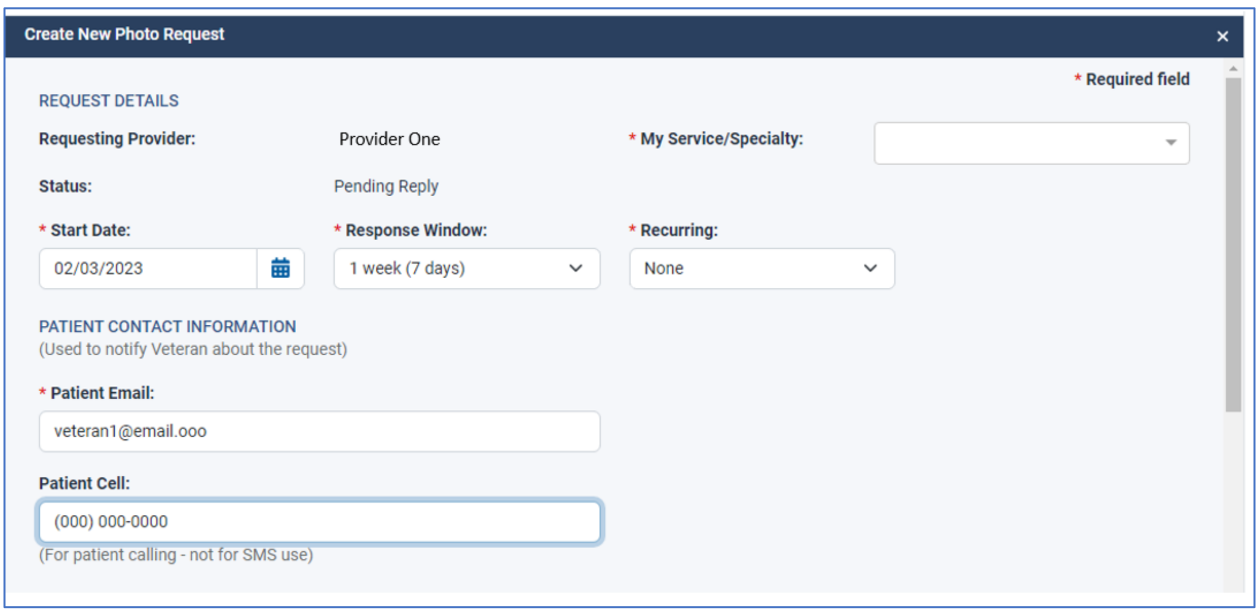
Select "Create New Request" to create a new Photo, Video or Telederm Request for a Veteran. Indicate the type of Request by selecting "Photo", "Video" or "Photo (Teledermatology)". Users with may select "Show restricted requests" to display the option to create a Telederm request. The example shown below is for a **Photo Request**.



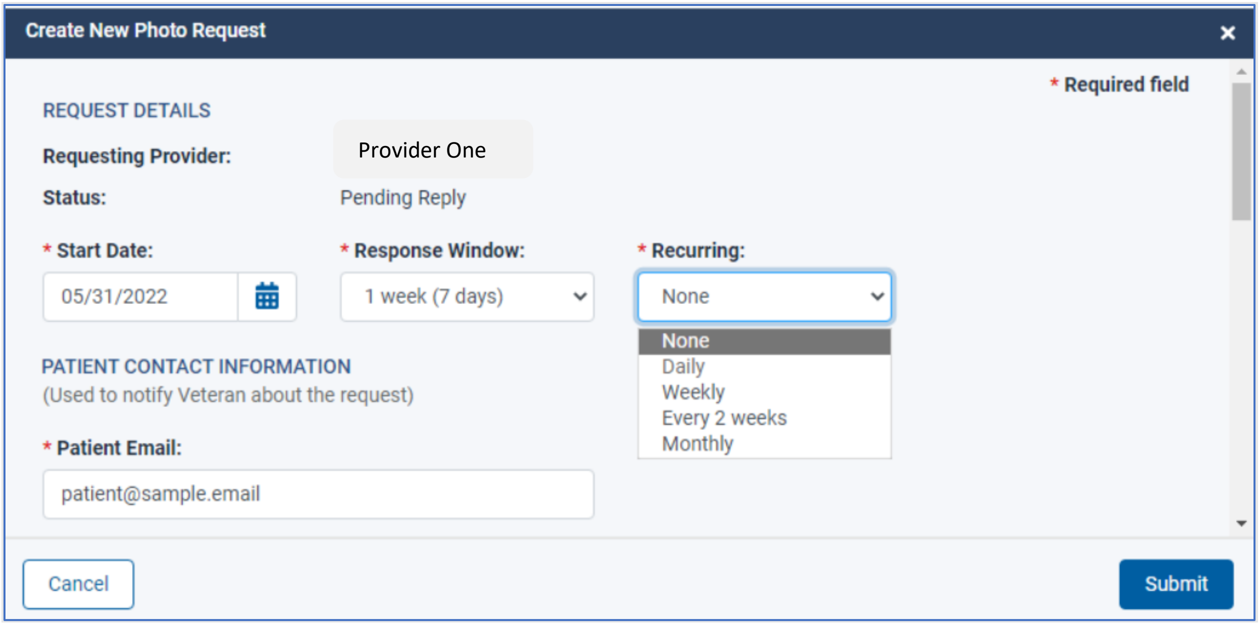




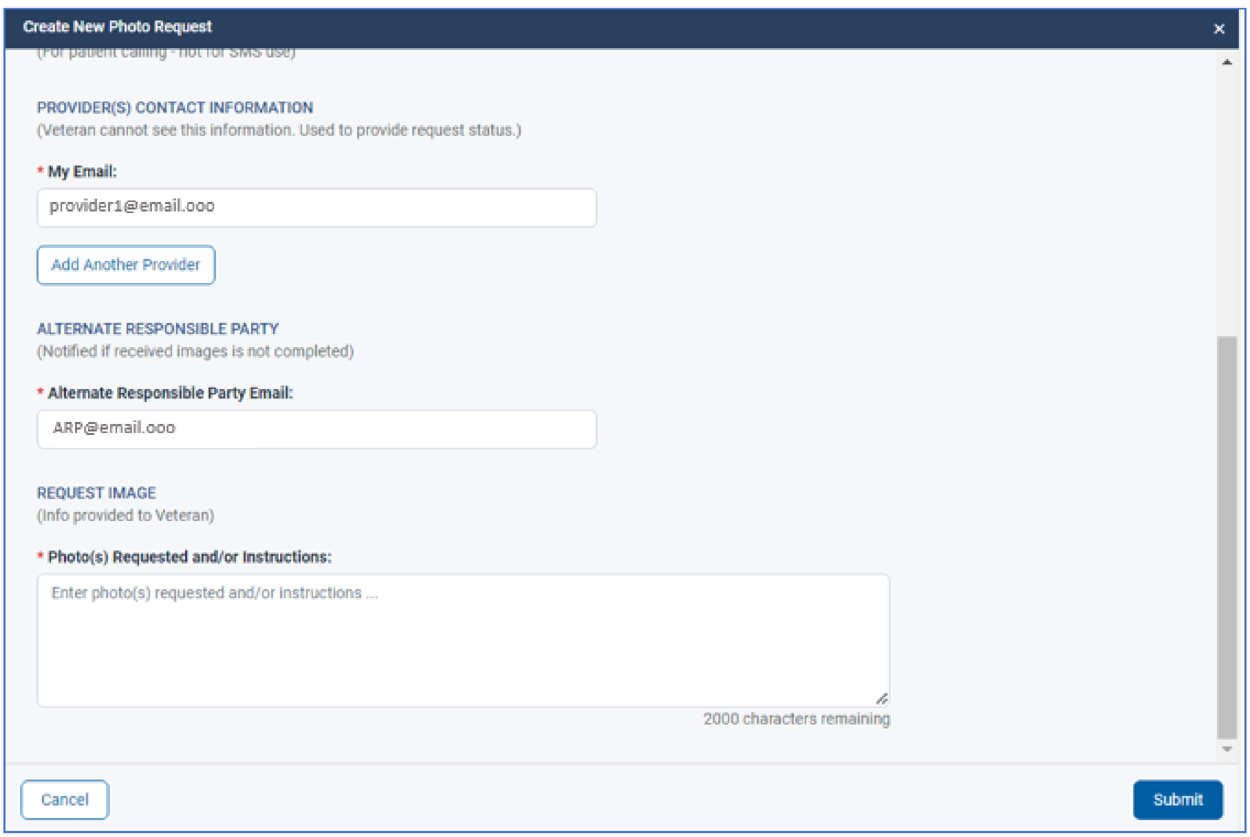
Users must enter the required fields below for new Photo, Video and Telederm Requests, as indicated by a red star.



The user has the option to select a Request that recurs daily, weekly, biweekly or monthly using the dropdown option under "Recurring". Selecting none will result in a single Request submission to the Veteran.

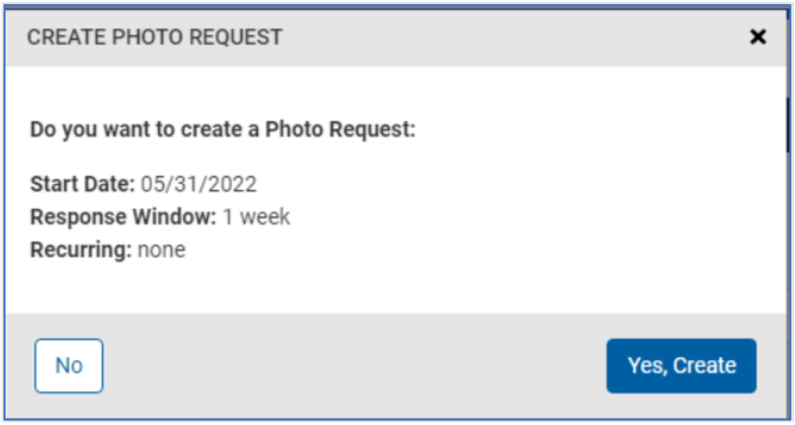


The user may enter multiple providers' contact information.

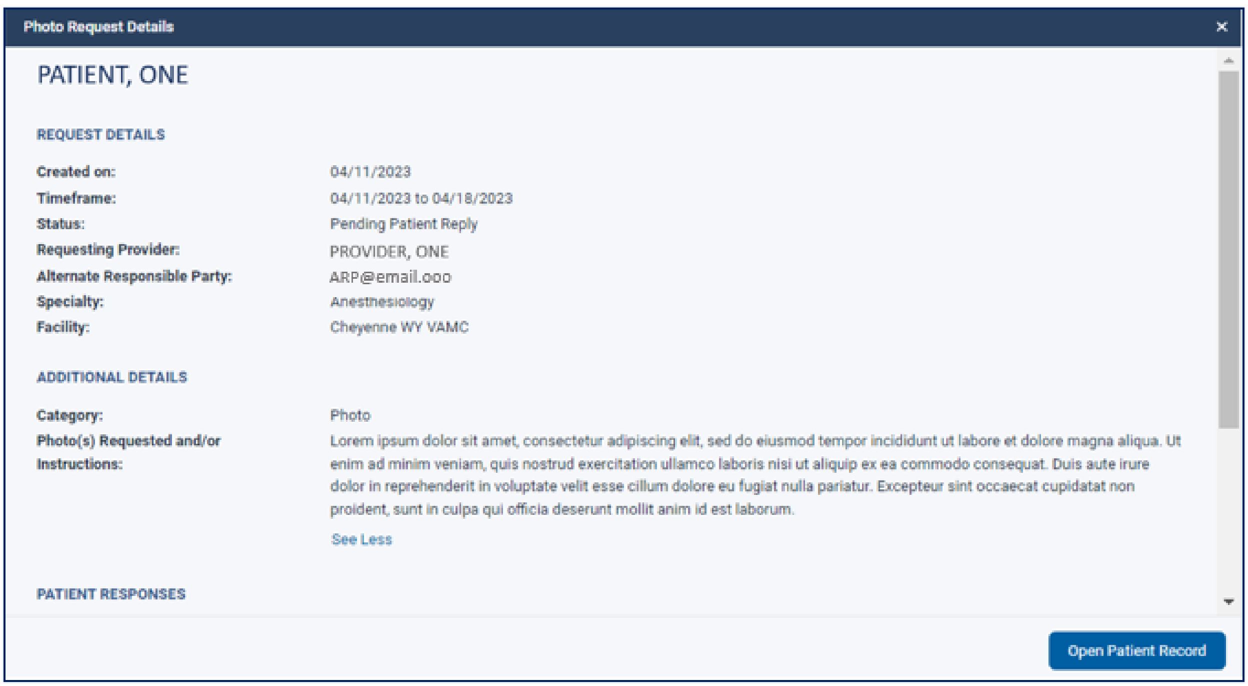


It is required to enter an email address for an Alternate Responsible Party (ARP) when completing a submission. This ARP is a colleague of the user who will receive notifications if the Requesting user does not respond to the Veteran's submitted Request. "My Email" cannot be the same email address as the email address of the ARP.

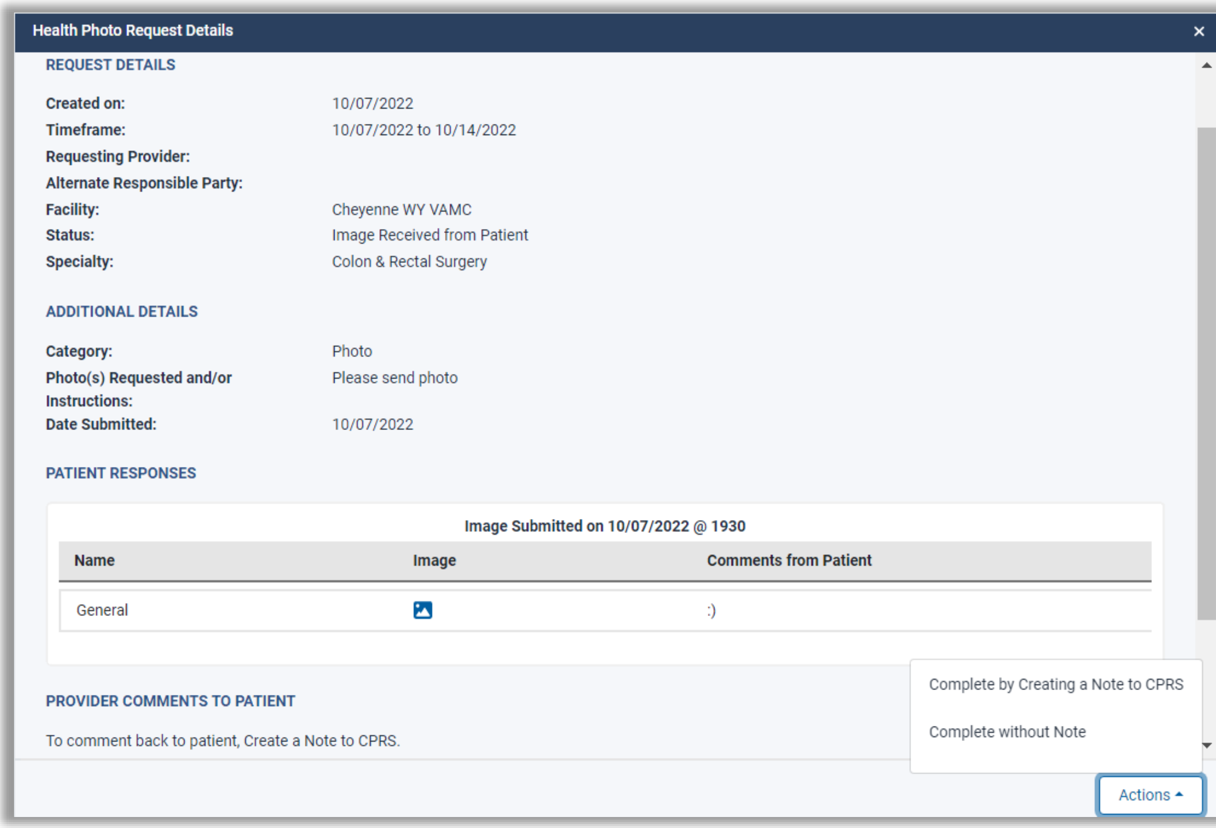
Once the required information has been completed, the user is prompted with a confirmation modal to clear or create the Request.



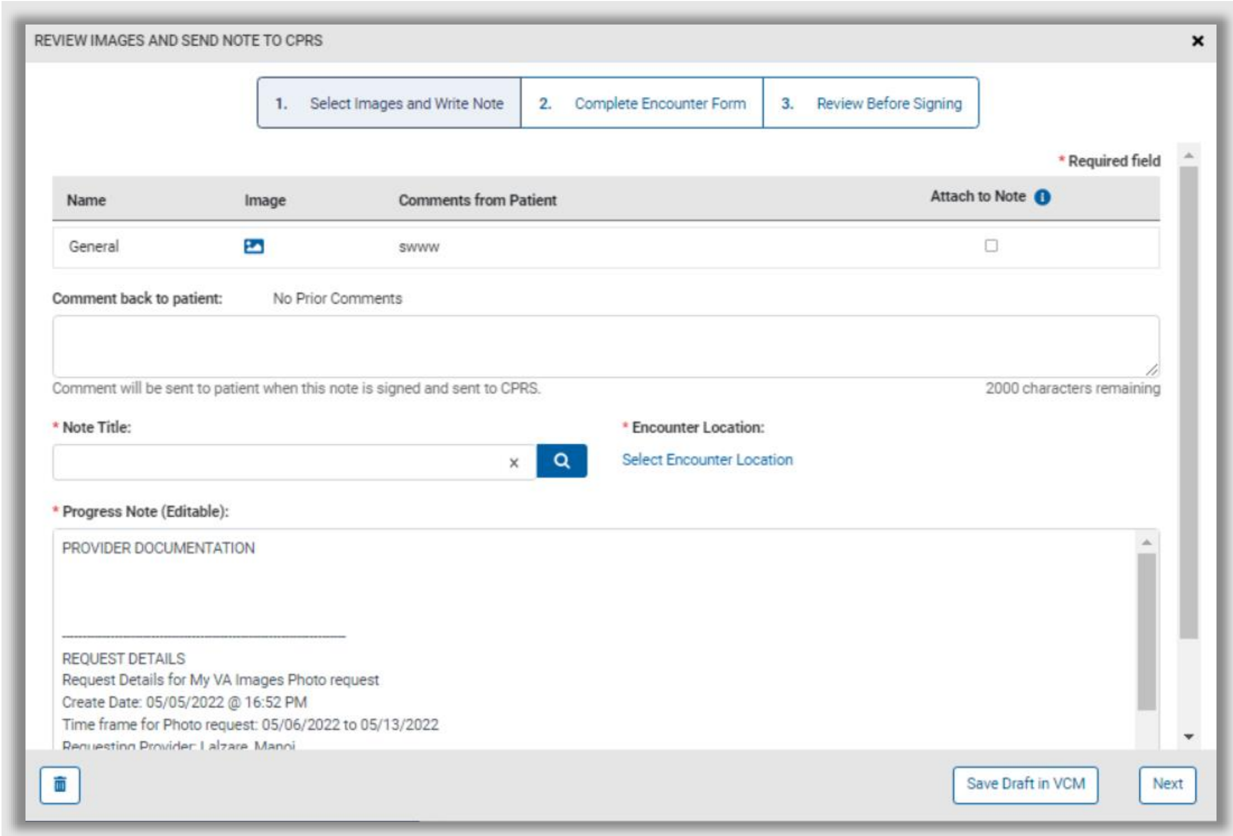
The following confirmation and details will display once the Request has been created.

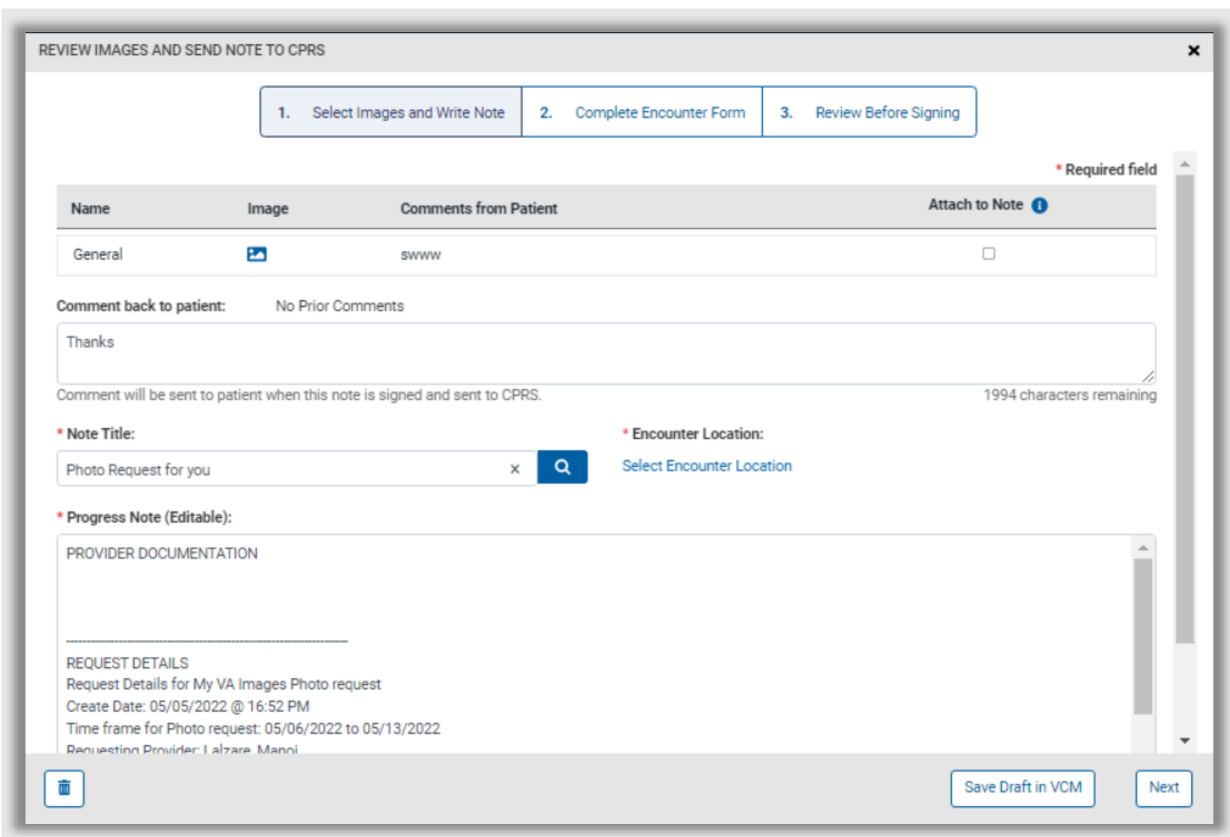


Once the Request is created, Actions are available, including the option to Complete the Request by Creating a Note to CPRS, or Complete the Request without a Note.

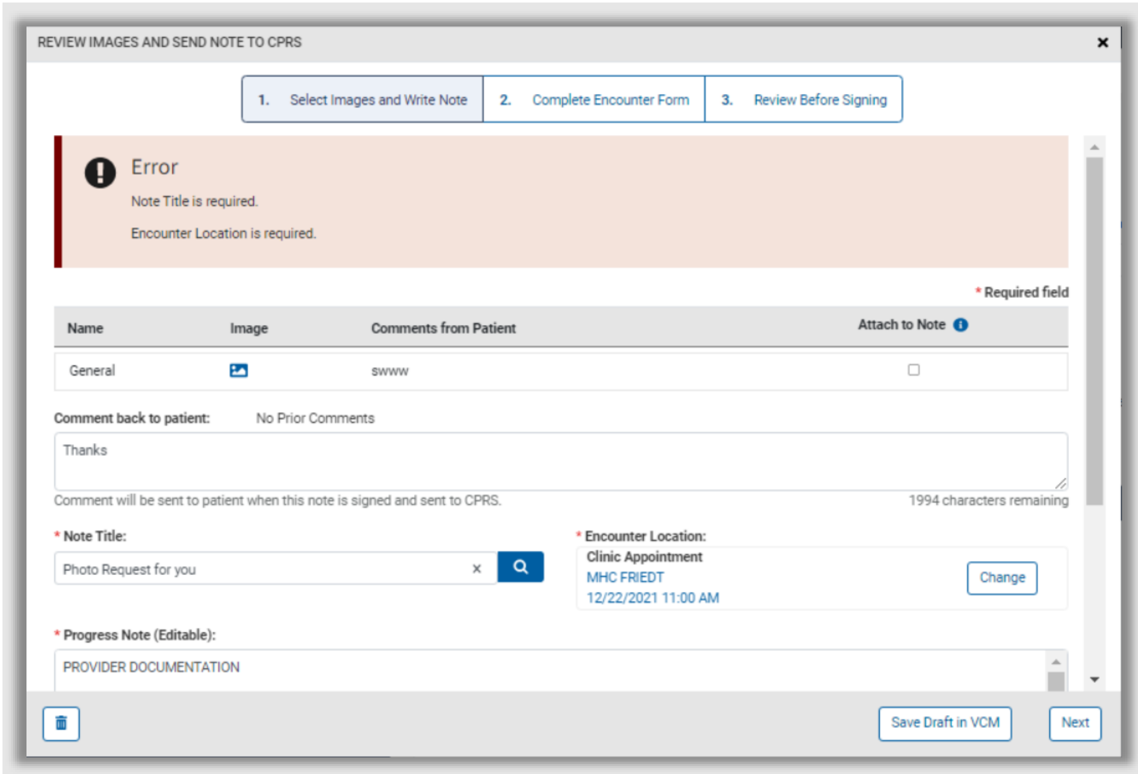


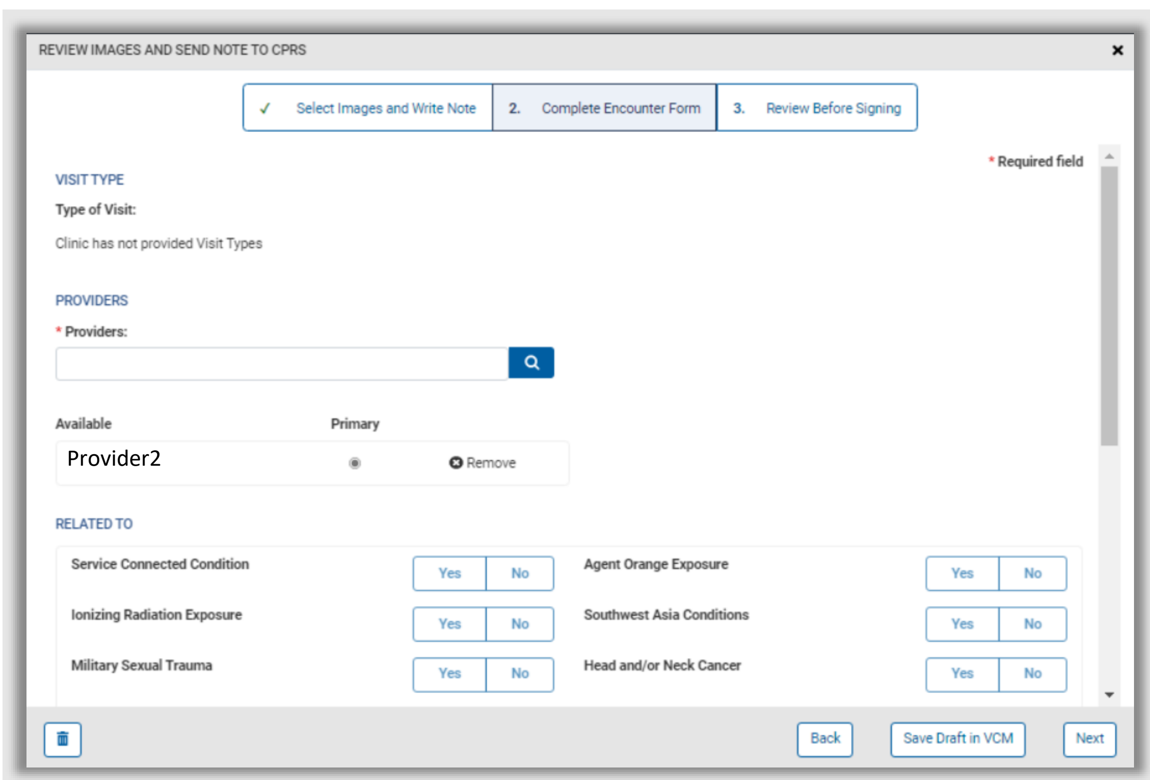
Once “Complete by Creating a Note to CPRS” is selected, the user can review images and send a note to CPRS by completing the following required and optional fields (required fields are designated with a red asterisk).

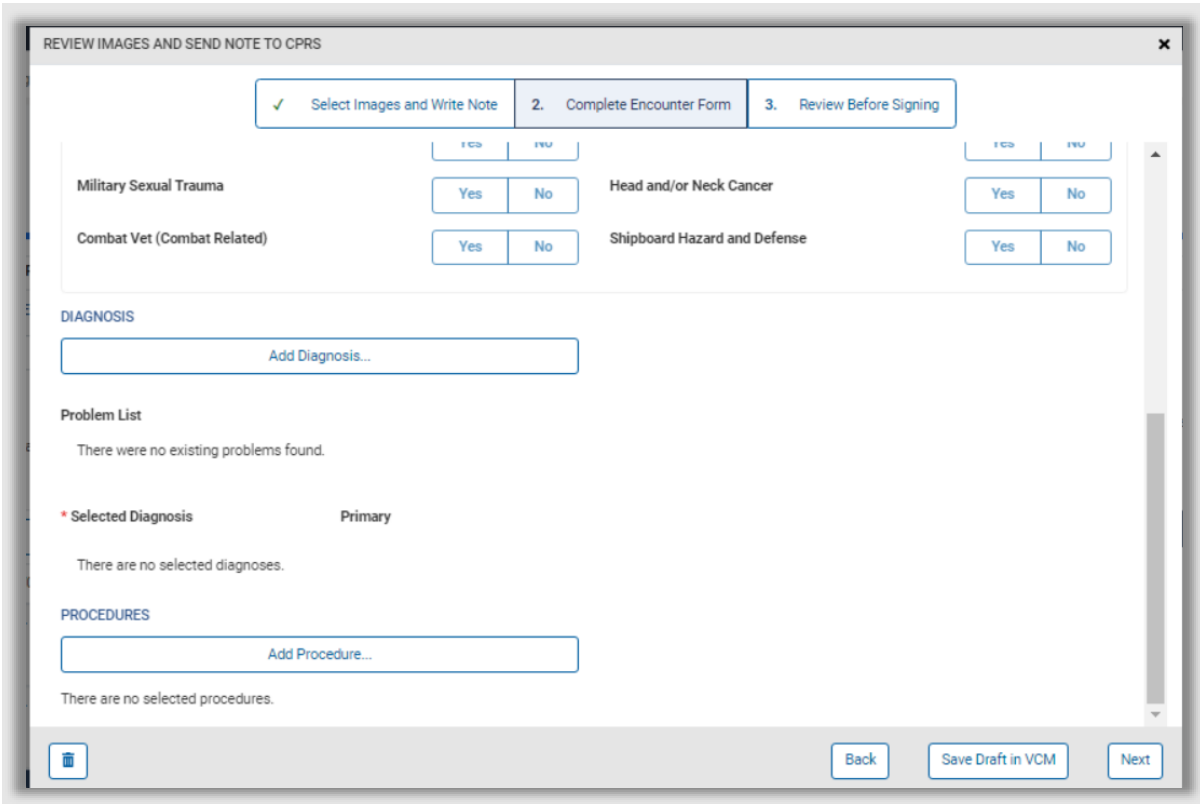

REVIEW IMAGES AND SEND NOTE TO CPRS
1. Select Images and Write Note
2. Complete Encounter Form
3. Review Before Signing
* Required field
Name
Image
Comments from Patient
Attach to Note
General
swww
Comment back to patient:
No Prior Comments
Comment will be sent to patient when this note is signed and sent to CPRS.
2000 characters remaining
* Note Title:
* Encounter Location:
Select Encounter Location
* Progress Note (Editable):
PROVIDER DOCUMENTATION
REQUEST DETAILS
Request Details for My VA Images Photo request
Create Date: 05/05/2022 @ 16:52 PM
Time frame for Photo request: 05/06/2022 to 05/13/2022
Save Draft in VCM
Next

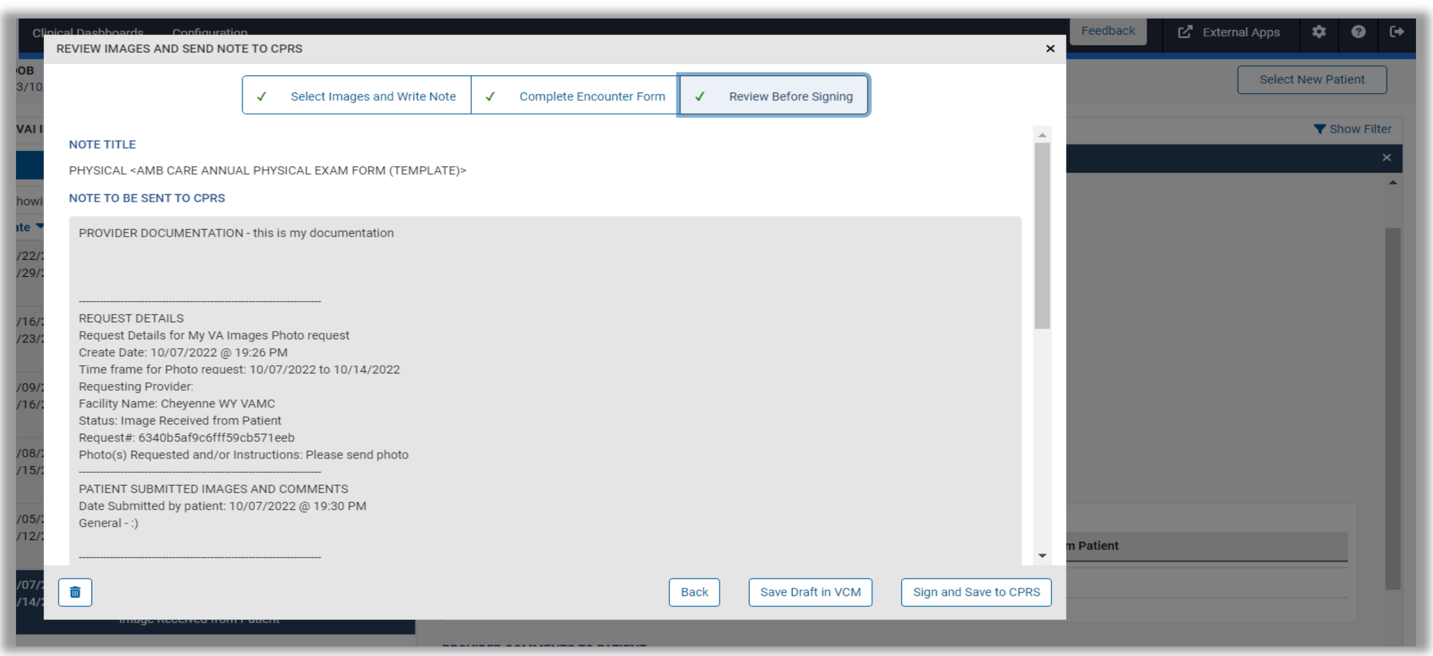

REVIEW IMAGES AND SEND NOTE TO CPRS
1. Select Images and Write Note
2. Complete Encounter Form
3. Review Before Signing
* Required field
Name
Image
Comments from Patient
Attach to Note
General
swww
Comment back to patient:
No Prior Comments
Thanks
Comment will be sent to patient when this note is signed and sent to CPRS.
1994 characters remaining
* Note Title:
Photo Request for you
* Encounter Location:
Select Encounter Location
* Progress Note (Editable):
PROVIDER DOCUMENTATION
REQUEST DETAILS
Request Details for My VA Images Photo request
Create Date: 05/05/2022 @ 16:52 PM
Time frame for Photo request: 05/06/2022 to 05/13/2022
Save Draft in VCM
Next

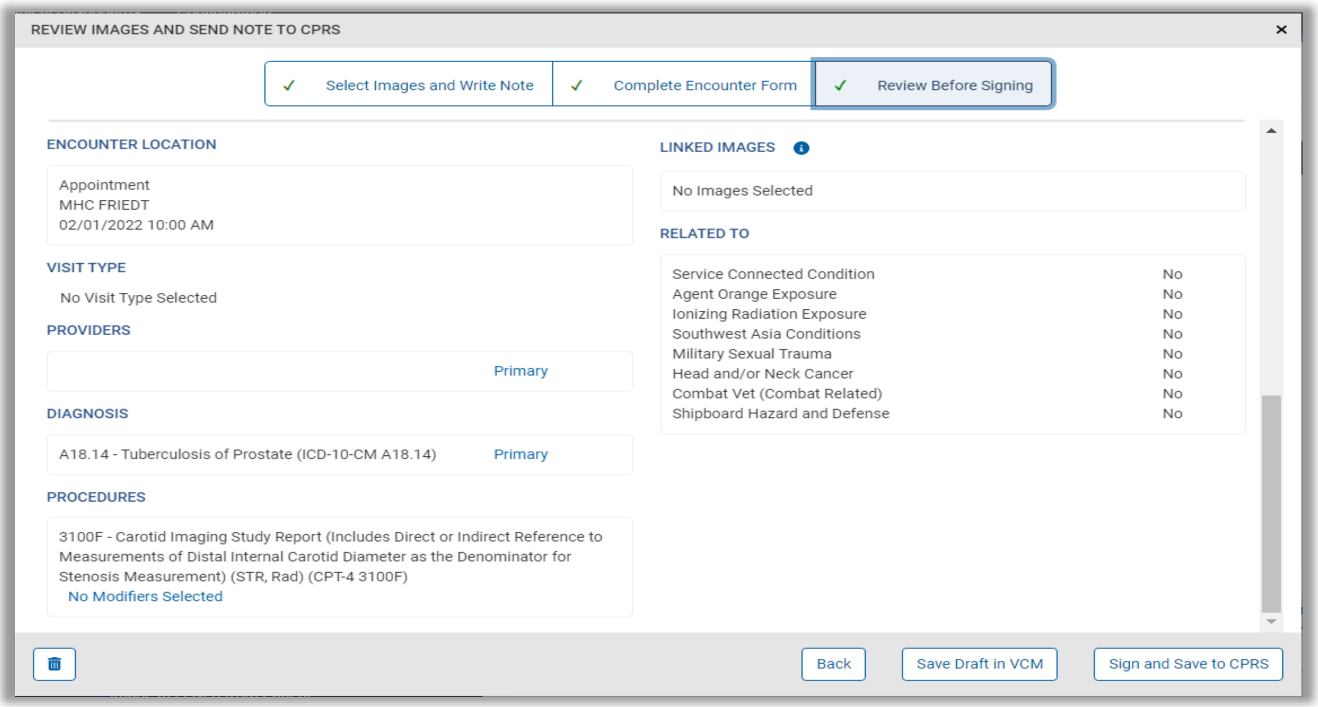
An error message will display if the user attempts to move through the note without completing required fields before moving to the next step.



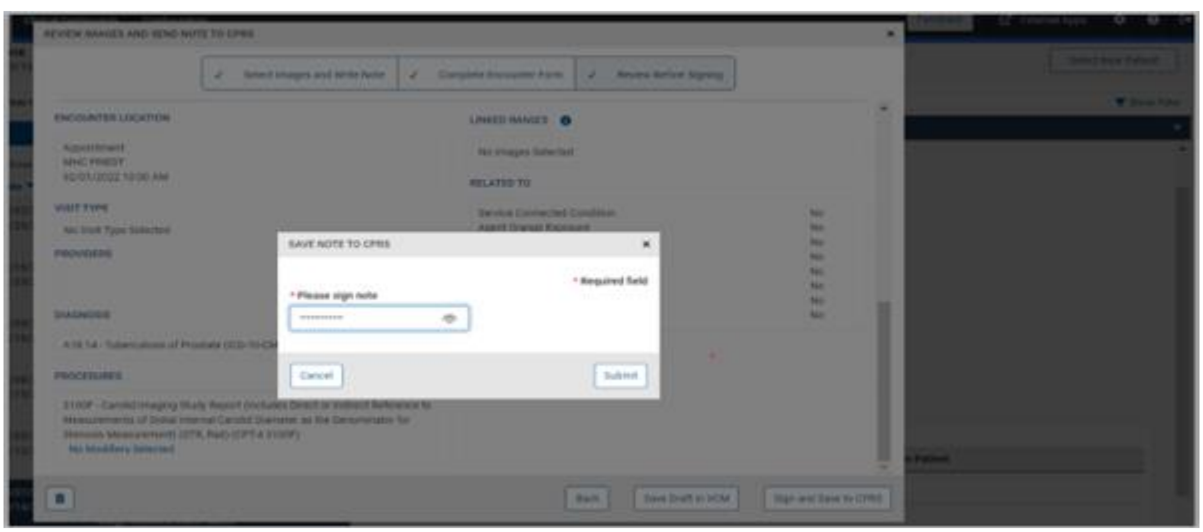



REVIEW IMAGES AND SEND NOTE TO CPRS
Select Images and Write Note
2. Complete Encounter Form
3. Review Before Signing
Military Sexual Trauma
Yes
No
Head and/or Neck Cancer
Yes
No
Combat Vet (Combat Related)
Yes
No
Shipboard Hazard and Defense
Yes
No
DIAGNOSIS
Add Diagnosis...
Problem List
There were no existing problems found.
* Selected Diagnosis
Primary
There are no selected diagnoses.
PROCEDURES
Add Procedure...
There are no selected procedures.
Back
Save Draft in VCM
Next


REVIEW IMAGES AND SEND NOTE TO CPRS
Select Images and Write Note
Complete Encounter Form
Review Before Signing
Feedback
External Apps
Select New Patient
Show Filter
NOTE TITLE
PHYSICAL <AMB CARE ANNUAL PHYSICAL EXAM FORM (TEMPLATE)>
NOTE TO BE SENT TO CPRS
PROVIDER DOCUMENTATION - this is my documentation
REQUEST DETAILS
Request Details for My VA Images Photo request
Create Date: 10/07/2022 @ 19:26 PM
Time frame for Photo request: 10/07/2022 to 10/14/2022
Requesting Provider:
Facility Name: Cheyenne WY VAMC
Status: Image Received from Patient
Request#: 6340b5af9c6fff59cb571eeb
Photo(s) Requested and/or Instructions: Please send photo
PATIENT SUBMITTED IMAGES AND COMMENTS
Date Submitted by patient: 10/07/2022 @ 19:30 PM
General - :)
Back
Save Draft in VCM
Sign and Save to CPRS



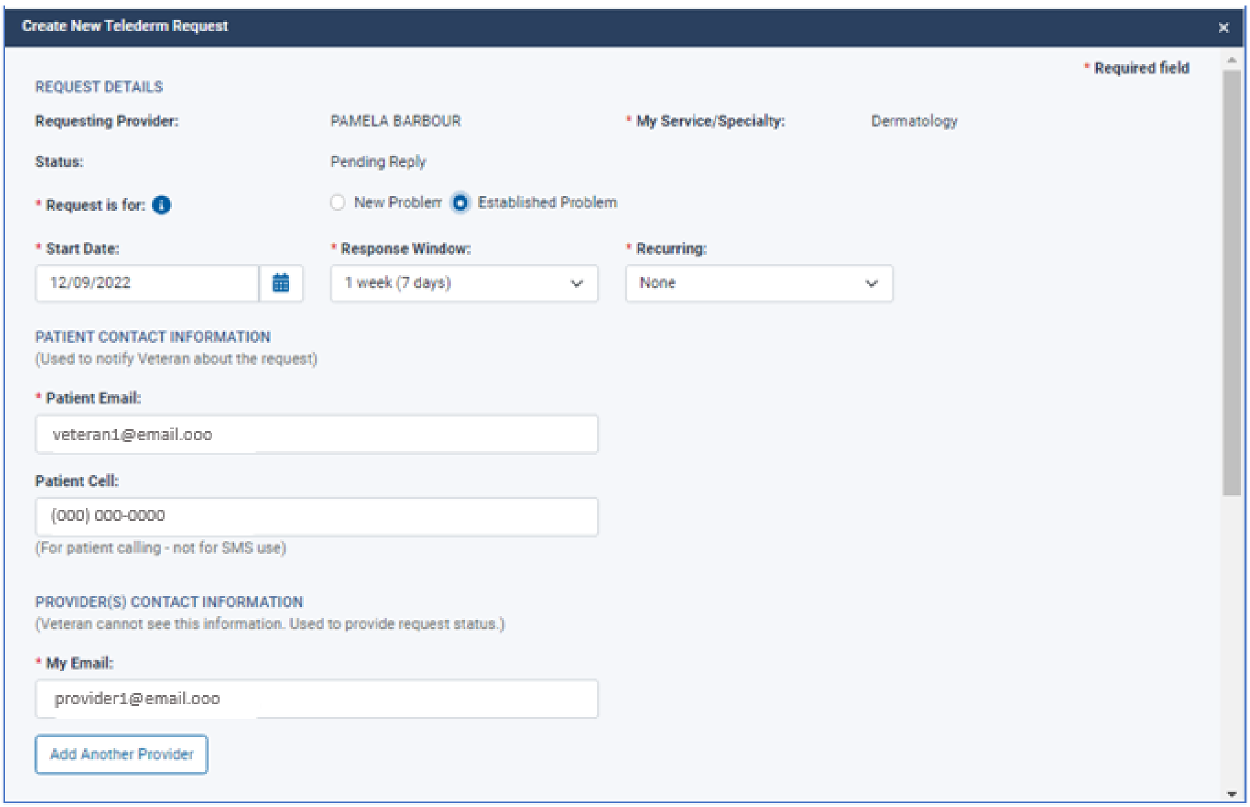
The user must electronically sign the note to submit the note to CPRS.

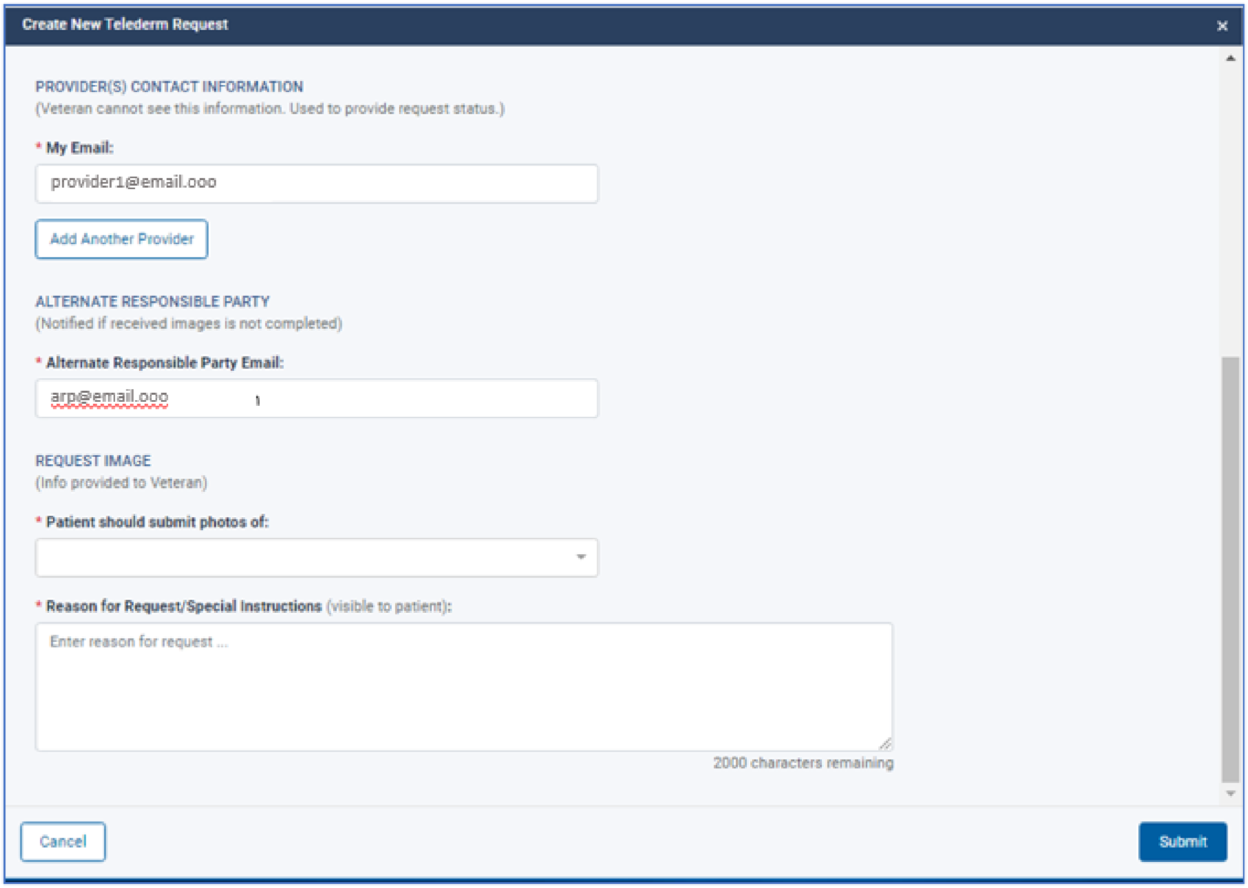


5.6.1 Telederm Requests for Patients

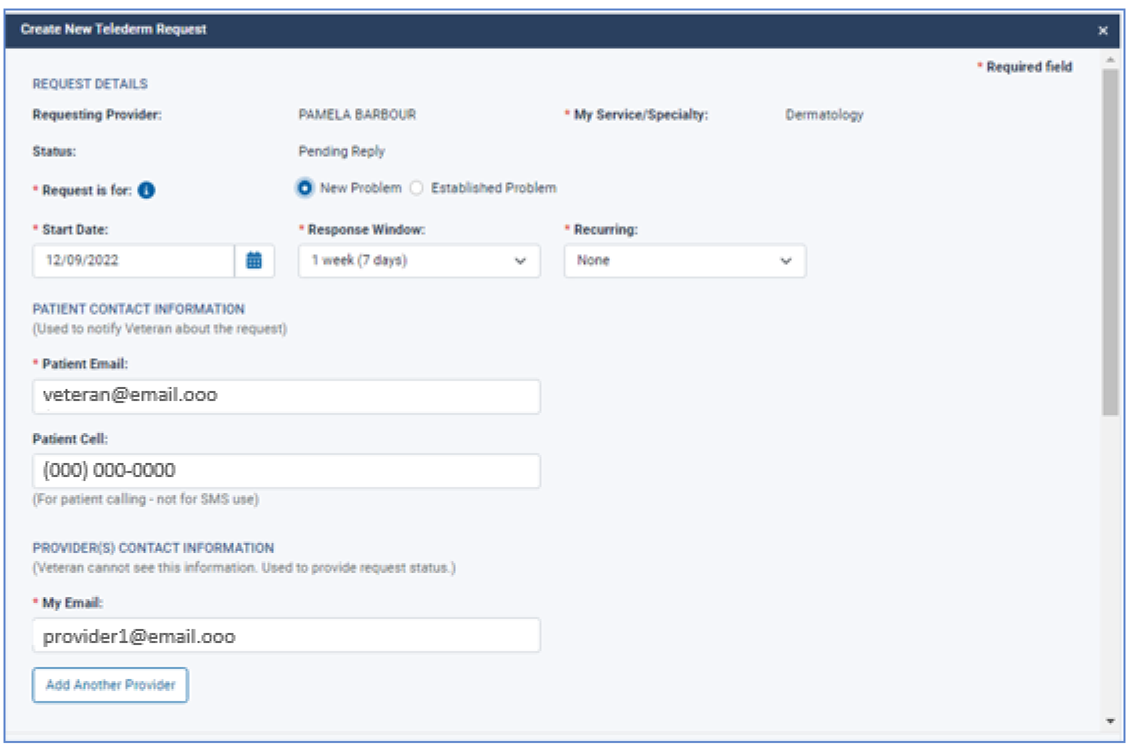
Users selecting **Create New Telederm Request** have the option to select if the Request is for an **Established Problem** or a **New Problem**. The selection of **Established** or **New Problem** determines the questions that the user will be prompted to answer before submitting the Request. Specifically, selecting **New Problem** will prompt the user to add any known medical history for the dermatologist to review (it is not visible to the patient). Fields with a red asterisk indicate required fields.

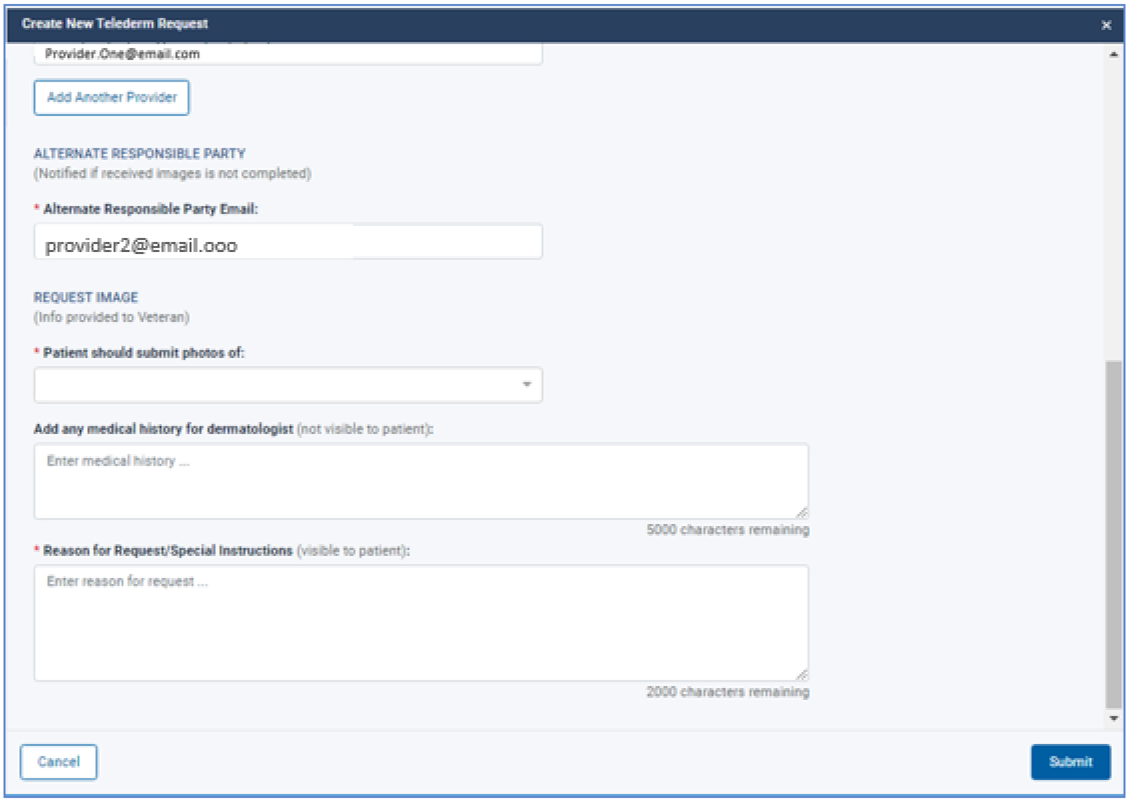
Established Problem:



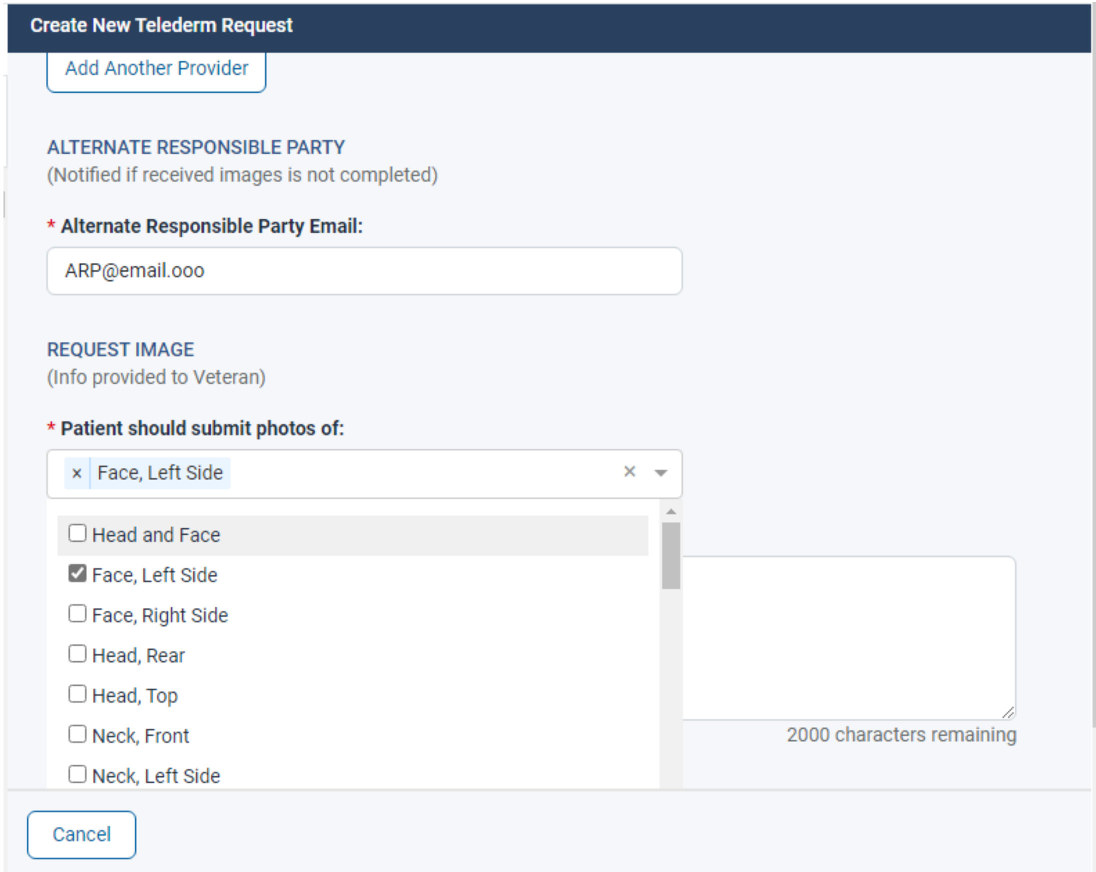

Create New Telederm Request
PROVIDER(S) CONTACT INFORMATION
(Veteran cannot see this information. Used to provide request status.)
* My Email:
provider1@email.ooo
Add Another Provider
ALTERNATE RESPONSIBLE PARTY
(Notified if received images is not completed)
* Alternate Responsible Party Email:
arp@email.ooo
REQUEST IMAGE
(Info provided to Veteran)
* Patient should submit photos of:
* Reason for Request/Special Instructions (visible to patient):
Enter reason for request ...
2000 characters remaining
Cancel
Submit

New Problem:

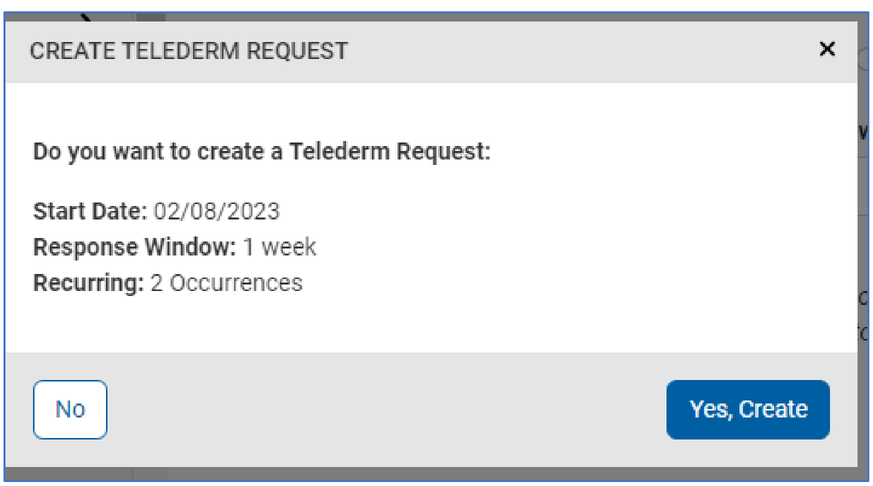

Create New Telederm Request
* Required field
REQUEST DETAILS
Requesting Provider:
PAMELA BARBOUR
* My Service/Specialty:
Dermatology
Status:
Pending Reply
* Request is for:
New Problem
Established Problem
* Start Date:
12/09/2022
* Response Window:
1 week (7 days)
* Recurring:
None
PATIENT CONTACT INFORMATION
(Used to notify Veteran about the request)
* Patient Email:
veteran@email.ooo
Patient Cell:
(000) 000-0000
(For patient calling - not for SMS use)
PROVIDER(S) CONTACT INFORMATION
(Veteran cannot see this information. Used to provide request status.)
* My Email:
provider1@email.ooo
Add Another Provider



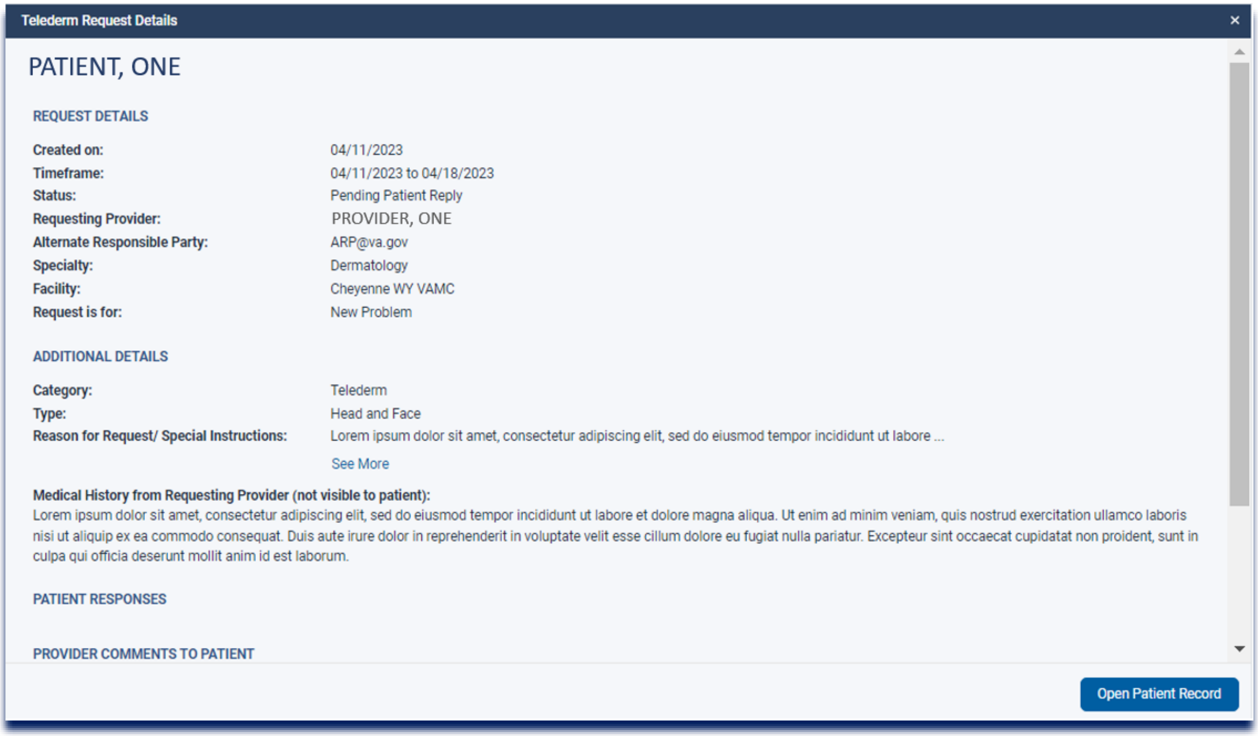
For Telederm only, the user must select one or multiple body parts for the Telederm Photo Request. This occurs for both **New** and **Established Problem**.

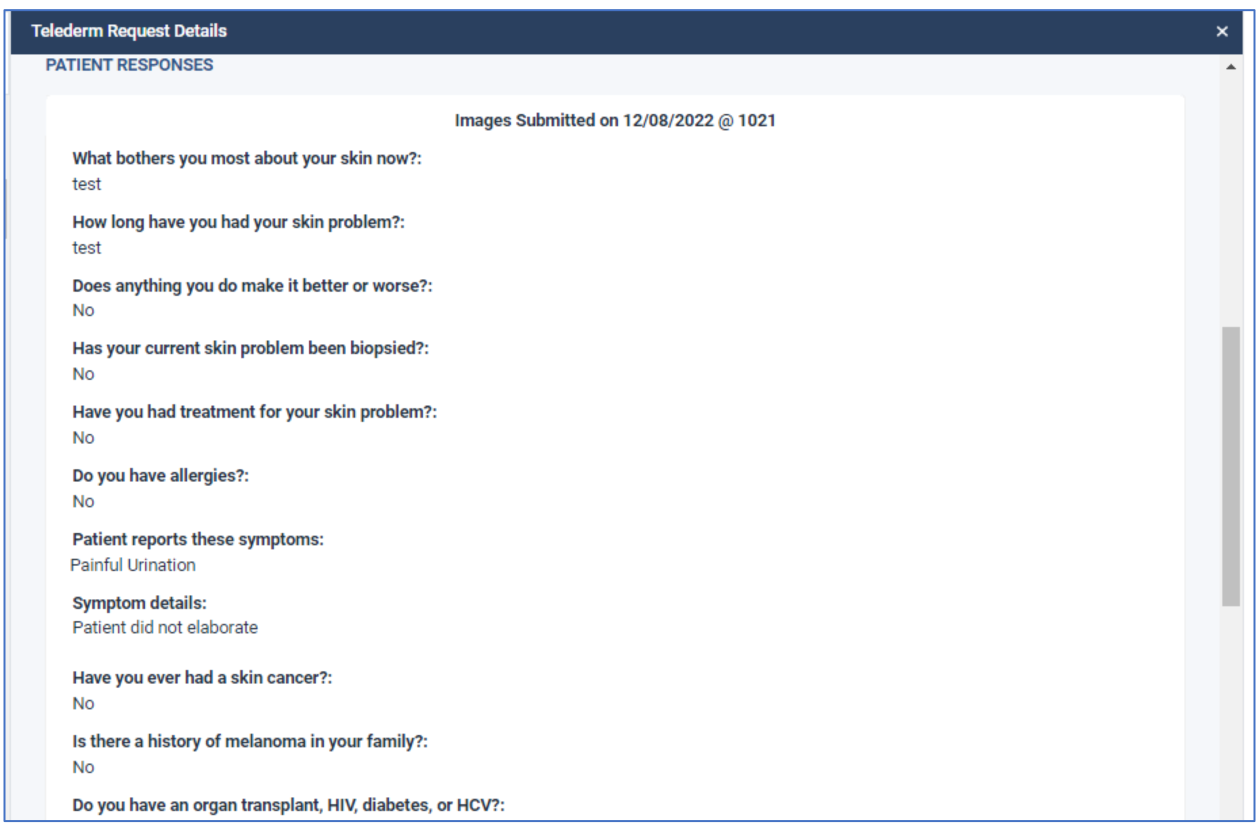


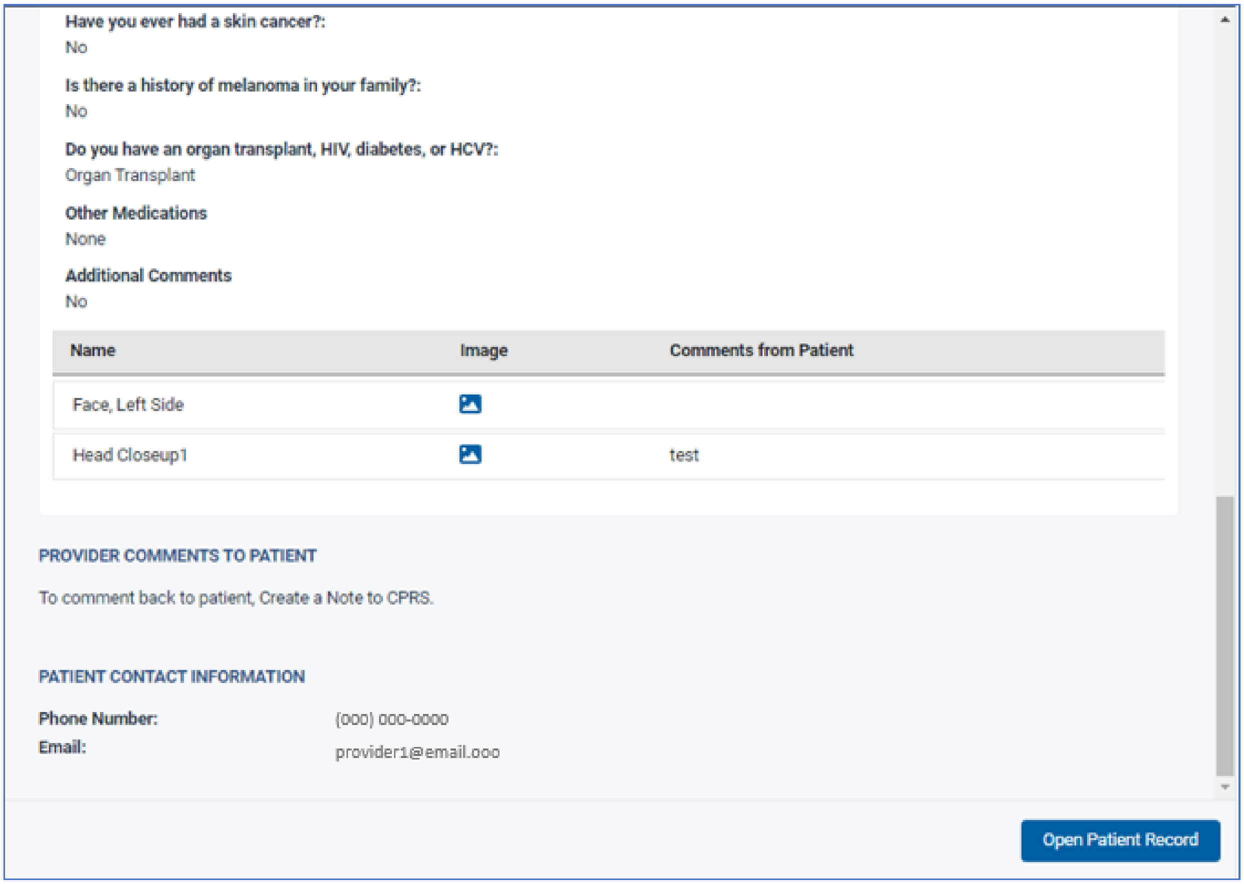
Once the required information has been completed, the user is prompted with a confirmation modal to clear or create the Request.



The following confirmation and details will display once the Request has been created.


Telederm Request Details
PATIENT, ONE
REQUEST DETAILS
Created on: 04/11/2023
Timeframe: 04/11/2023 to 04/18/2023
Status: Pending Patient Reply
Requesting Provider: PROVIDER, ONE
Alternate Responsible Party: ARP@va.gov
Specialty: Dermatology
Facility: Cheyenne WY VAMC
Request is for: New Problem
ADDITIONAL DETAILS
Category: Telederm
Type: Head and Face
Reason for Request/ Special Instructions: Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore ...
See More
Medical History from Requesting Provider (not visible to patient):
Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.
PATIENT RESPONSES
PROVIDER COMMENTS TO PATIENT
Open Patient Record


Telederm Request Details
PATIENT RESPONSES
Images Submitted on 12/08/2022 @ 1021
What bothers you most about your skin now?:
test
How long have you had your skin problem?:
test
Does anything you do make it better or worse?:
No
Has your current skin problem been biopsied?:
No
Have you had treatment for your skin problem?:
No
Do you have allergies?:
No
Patient reports these symptoms:
Painful Urination
Symptom details:
Patient did not elaborate
Have you ever had a skin cancer?:
No
Is there a history of melanoma in your family?:
No
Do you have an organ transplant, HIV, diabetes, or HCV?:



As with Photo Request, above, once the Request is created, Actions are available, including the option to Complete the Request by Creating a Note to CPRS, or Complete the Request without a Note.

If you are logged into a VistA Integrated Facility, you will receive a prompt to enter your Facility location from a dropdown list. The selected Facility will populate in the Details View of the Request.

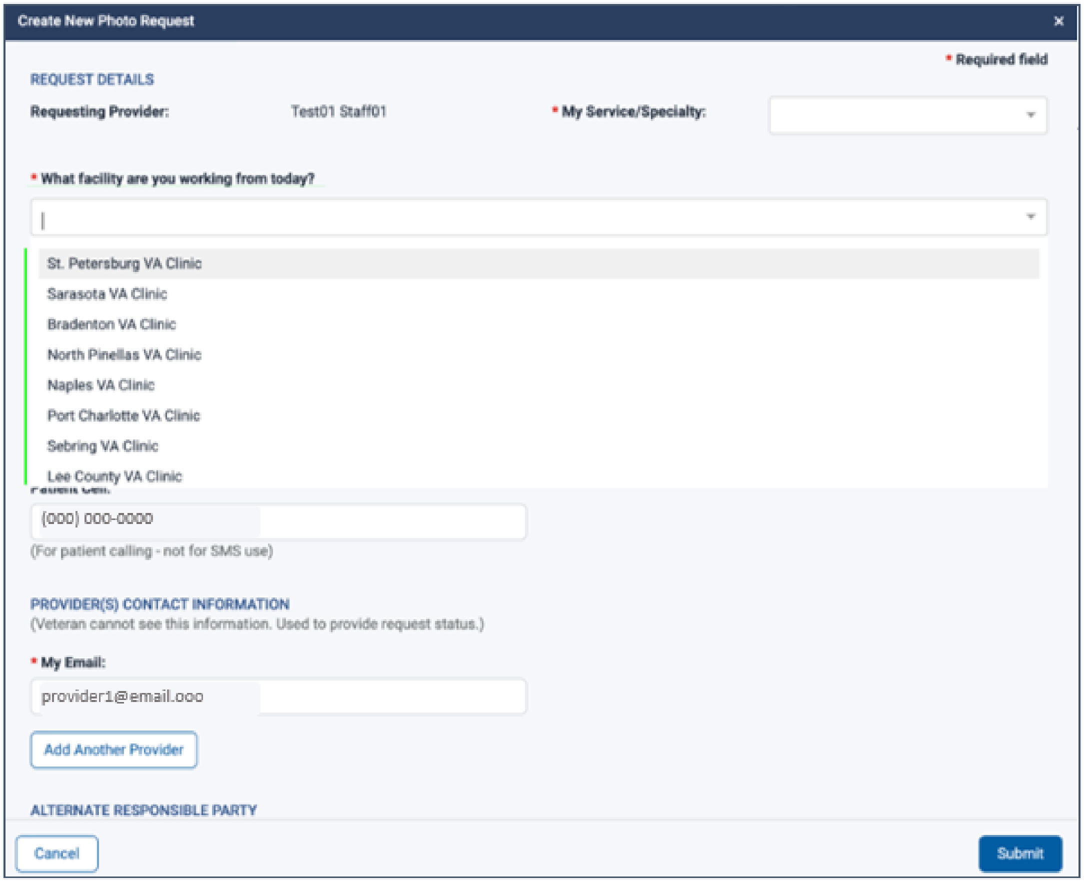

Create New Photo Request
* Required field
REQUEST DETAILS
Requesting Provider:
Test01 Staff01
* My Service/Specialty:
* What facility are you working from today?
St. Petersburg VA Clinic
Sarasota VA Clinic
Bradenton VA Clinic
North Pinellas VA Clinic
Naples VA Clinic
Port Charlotte VA Clinic
Sebring VA Clinic
Lee County VA Clinic
(000) 000-0000
(For patient calling - not for SMS use)
PROVIDER(S) CONTACT INFORMATION
(Veteran cannot see this information. Used to provide request status.)
* My Email:
provider1@email.ooo
Add Another Provider
ALTERNATE RESPONSIBLE PARTY
Cancel
Submit


Photo Request Details
PATIENT, ONE
REQUEST DETAILS
Created on: 12/13/2022
Timeframe: 12/13/2022 to 12/20/2022
Status: Pending Patient Reply
Requesting Provider: Staff01, Test01
Alternate Responsible Party: alt@test.com
Specialty: Audiology
Facility: Sarasota VA Clinic
ADDITIONAL DETAILS
Category: Photo
Photo(s) Requested and/or Instructions: test photo
PATIENT RESPONSES
PROVIDER COMMENTS TO PATIENT
To comment back to patient, Create a Note to CPRS.
PATIENT CONTACT INFORMATION
Phone Number: (000) 000-0000
Email: patient1@email.ooo

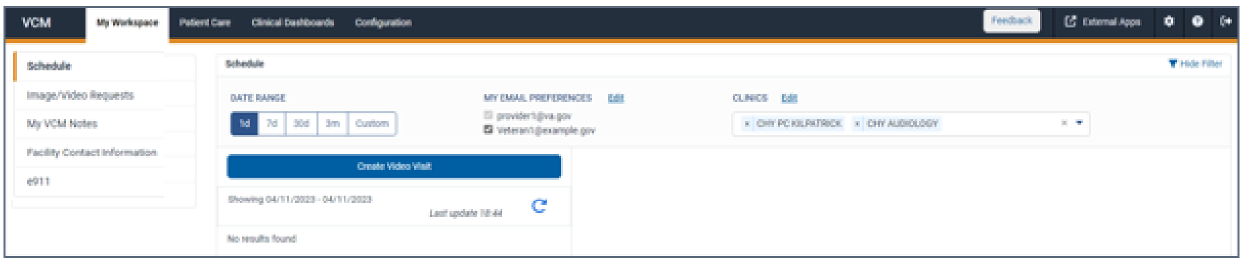
6. My Workspace Tab

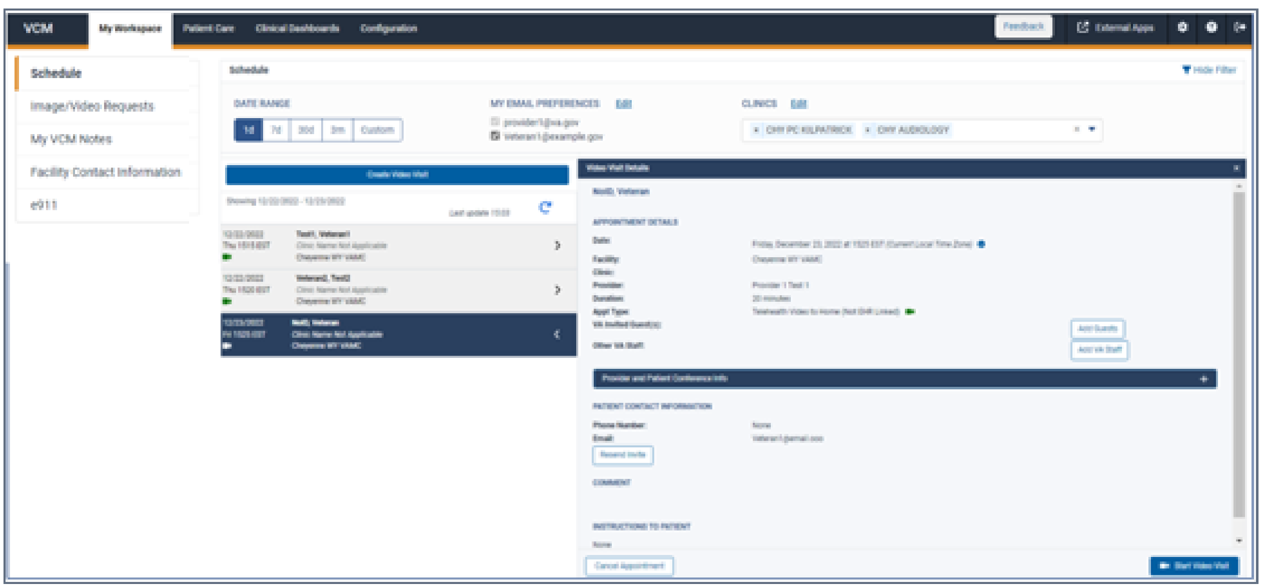
The My Workspace area of the system provides the full schedule of upcoming appointments for the authenticated user.

6.1 Schedule

This menu option allows the creation and management of appointments for patients not in the current facility's Veterans Information Systems and Technology Architecture (VistA), a single patient in the current VistA facility, as well as group appointments for healthcare treatment of multiple patients at the same time.

6.1.1 Upcoming Schedule

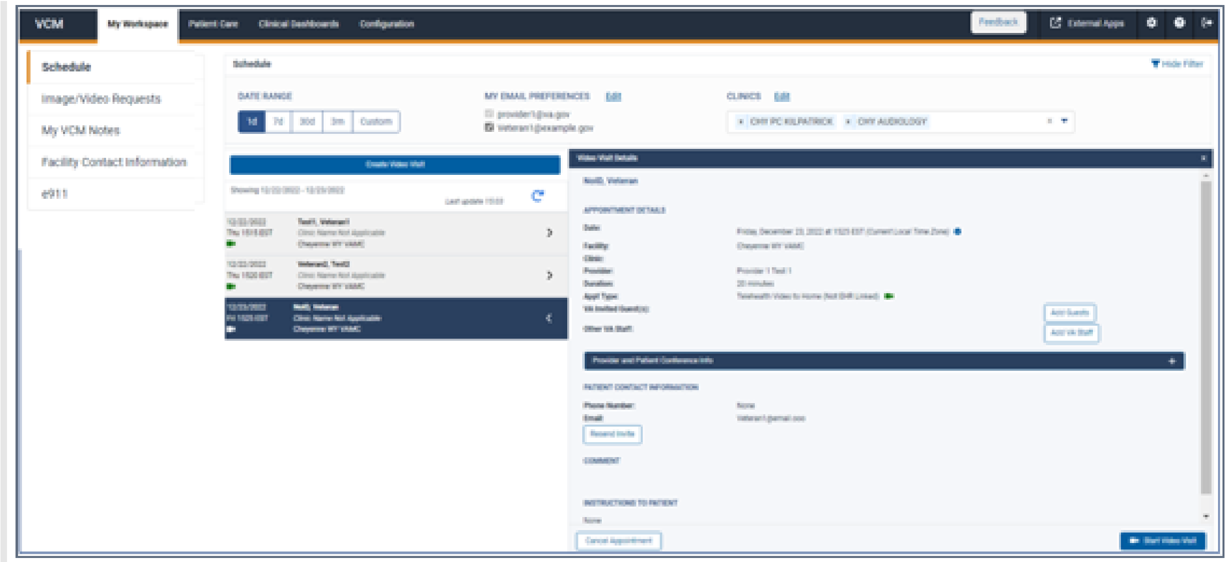




6.1.1.1 Schedule Filters

1. Set the date range Filter using the From and To fields, and then select the **Update** button for upcoming scheduled appointments to appear.
2. Narrow the results down further by using My Email Preferences or Clinics filters, by checking or unchecking the checkboxes for each choice, and selecting the **Update** button again to modify the scheduled appointments shown.

3. Select an appointment from the results listed below the search filters, to view the Scheduled Appointment Details modal.



6.1.2 Schedule List View

Scheduled appointments for the Provider can be viewed within their Schedule tab. Appointments displayed include Telehealth, Traditional (In Person), and Telephone.

If the appointment is Telehealth, a video camera icon displays in the list view. If the Clinic name contains “Phone” or “Telephone”, a telephone icon displays. Traditional non-telephone appointments do not have an icon.

For video visits, fifteen (15) minutes prior to the appointment time until the end of the appointment duration time, an icon displays in the list view to “Start”. Selecting this icon launches VVC for the video visit.

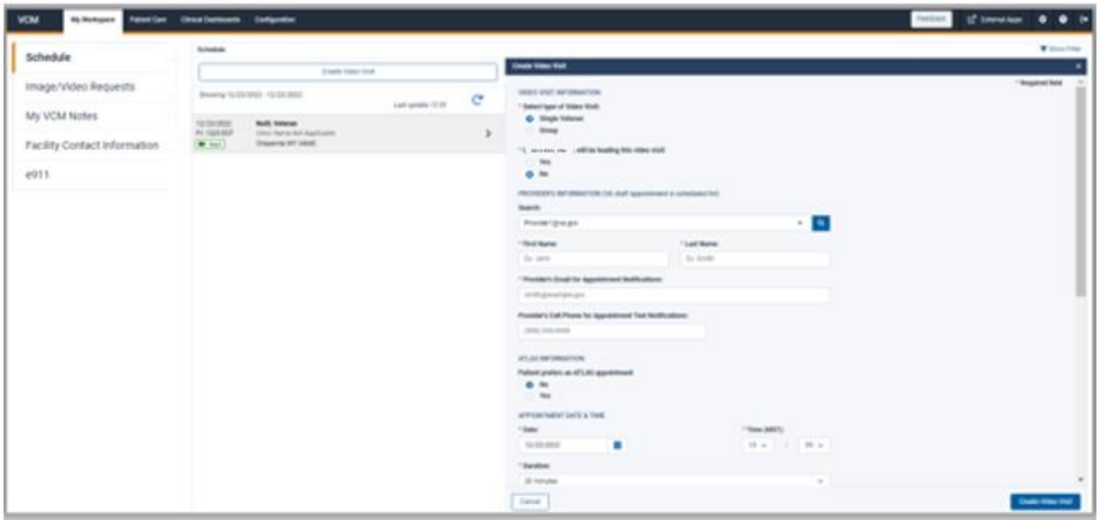
If a Patient has joined the video visit on the current date, an icon displays “Online” in the list view below the date and time. When the Patient exits the application using “Leave”, the online icon is cleared.

In the Appointment Details, there are appointment management buttons for Telehealth appointments, such as a Resend Notification button for updates to appointments, a Start button for Video Visits, and a Cancel Appointment button. Traditional and Telephone appointments cannot be managed from VCM.

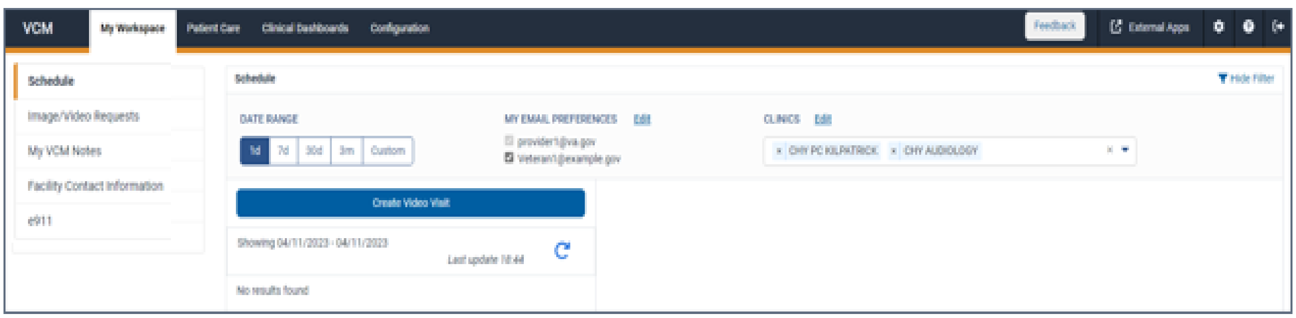
6.1.3 Create New Video Visit for a Single Veteran (Email Only)

Patients not in the current VistA cannot be located via Patient Search on the Patient Care tab. This means that to make an appointment for them, you will go to the My Workspace tab instead.

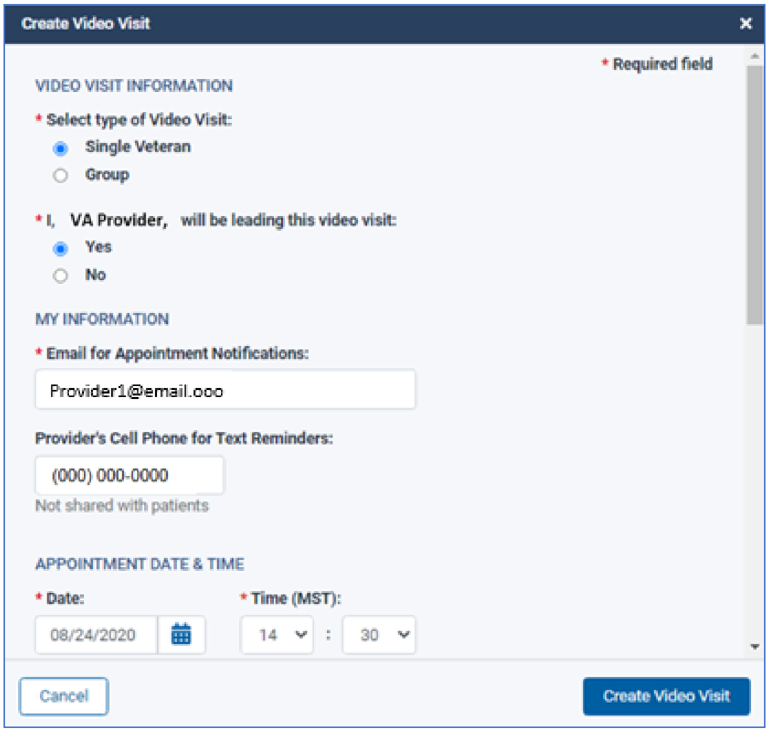
To create a new appointment for a Single Veteran (Email Only):



1. On the My Workspace tab, select **Schedule** from the menu on the left.



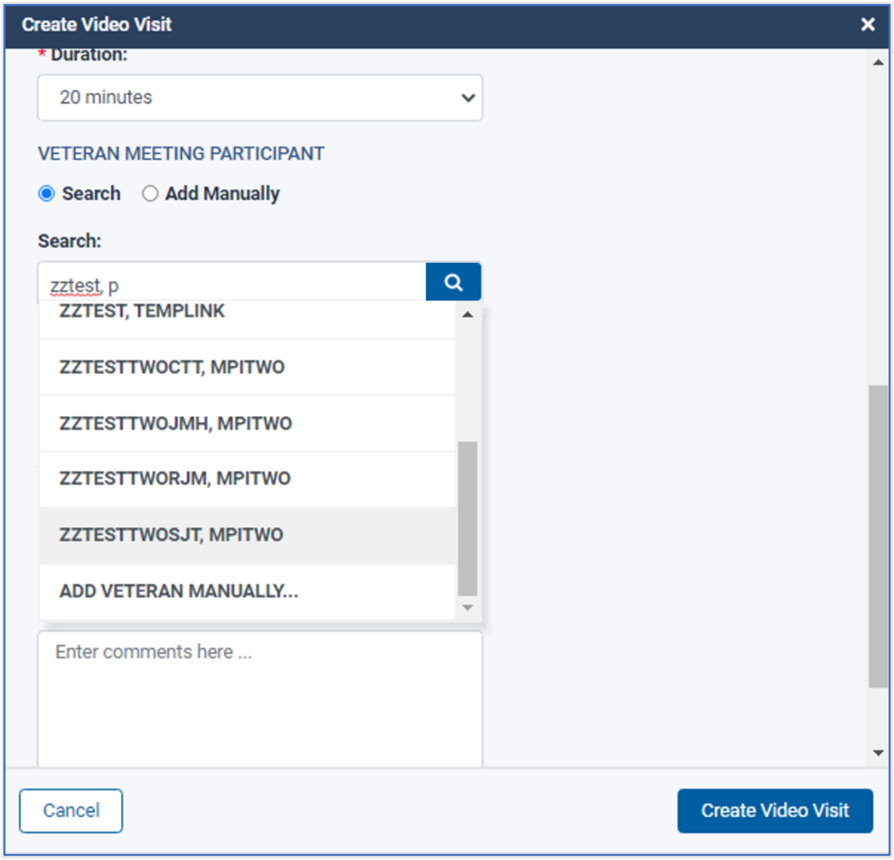
2. Select the **Create Video Visit** button.



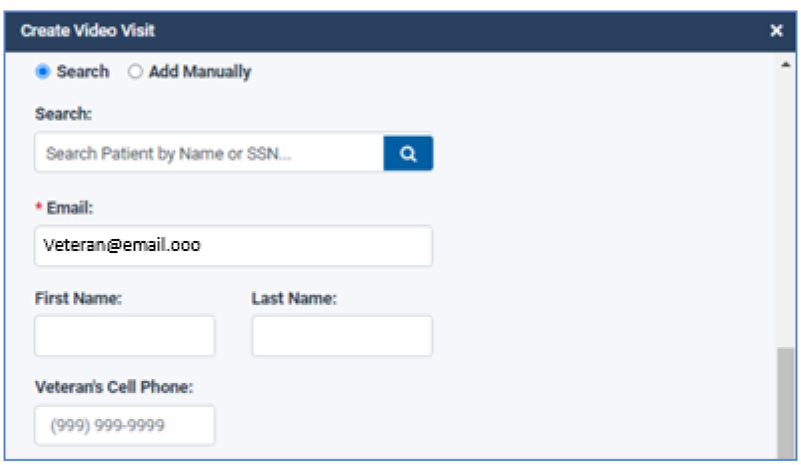
3. Maintain the default selection of **Single Veteran (Email Only)** in the Type of Video Visit field.
4. Indicate who is creating the appointment. The visit information form will default to the **Yes** radio-button, meaning the appointment is for you, the provider.

Note: <u>If you are not the provider</u>, you will choose the **No** radio-button in this step, to create the appointment for someone else. Follow the **Steps 2a-d** in *Section 5.2.2 Create New Video Visit*, for images and instructions for creating a video visit on behalf of another healthcare provider.

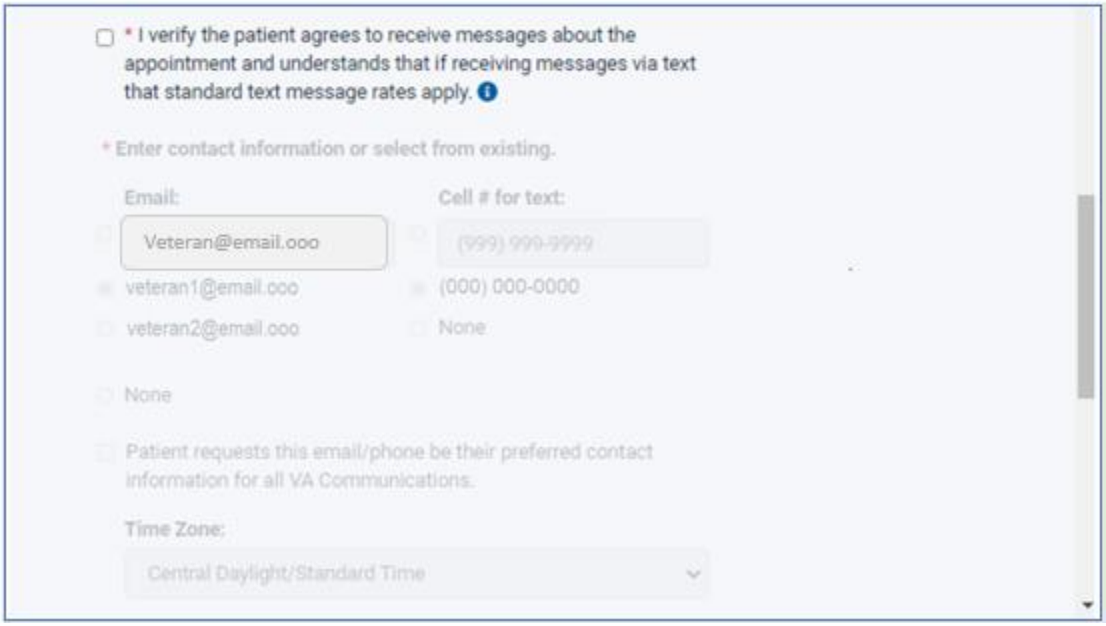
5. Set the date, time, and duration of the appointment. As with a single Veteran appointment in Appointments, you can create more than one appointment at a time by Selecting Add Another Date. The time and duration will be copied from the previous appointment. You must enter a date and can change the time and duration.
6. To add a patient to the appointment, you can either search for the patient, or add their information manually. If the patient is in the VistA facility patient list, you can Search for the Patient by name or SSN. The patient's name will pre-fill. If the patient has preferences from a previous appointment, the email and phone will also pre-fill.



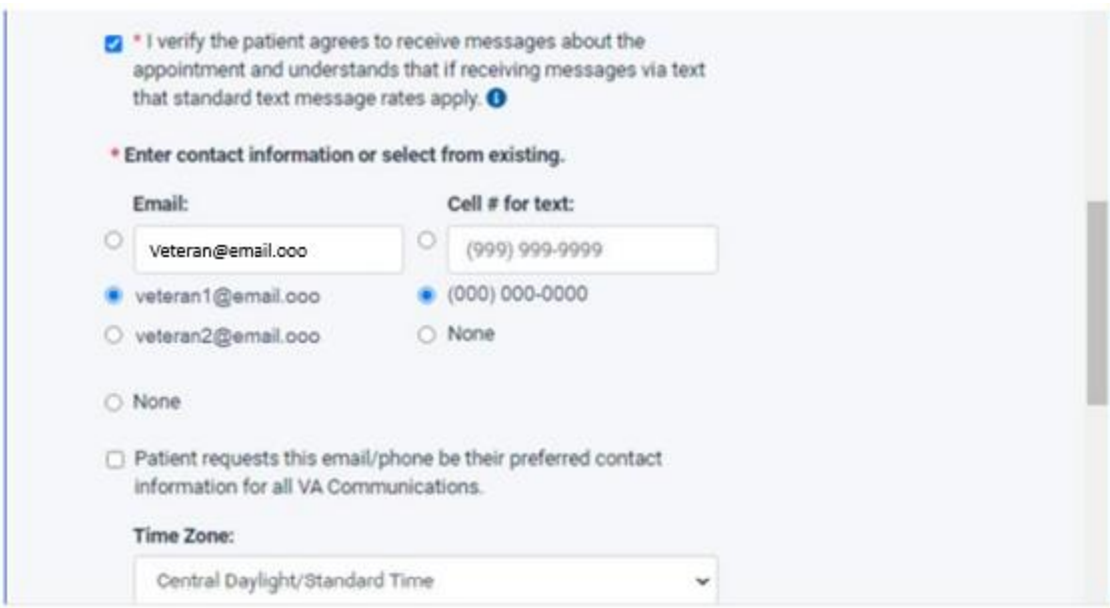
7. If the patient is not found in the search, you can select Add Veteran Manually.



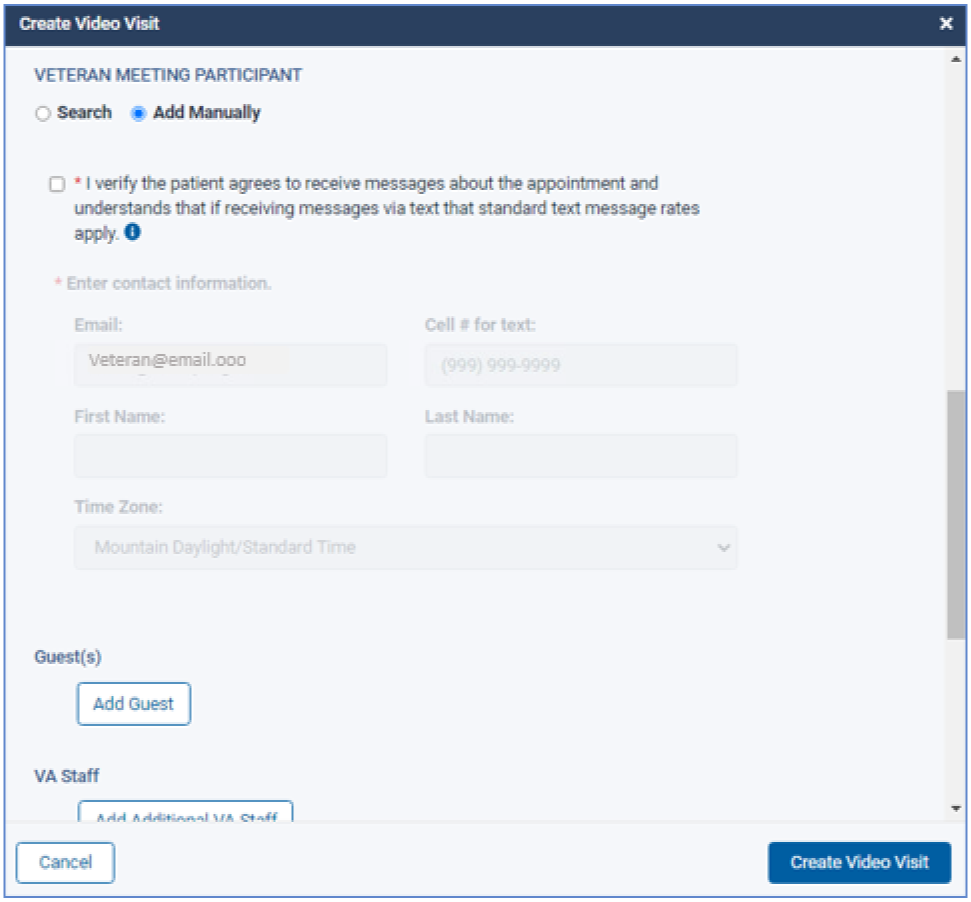
8. When the patient is selected, verify that they have agreed to accept messages, then select the correct email and or phone, or enter a new email and/or phone. If the patient has not agreed to receive text messages, select “None” for phone.

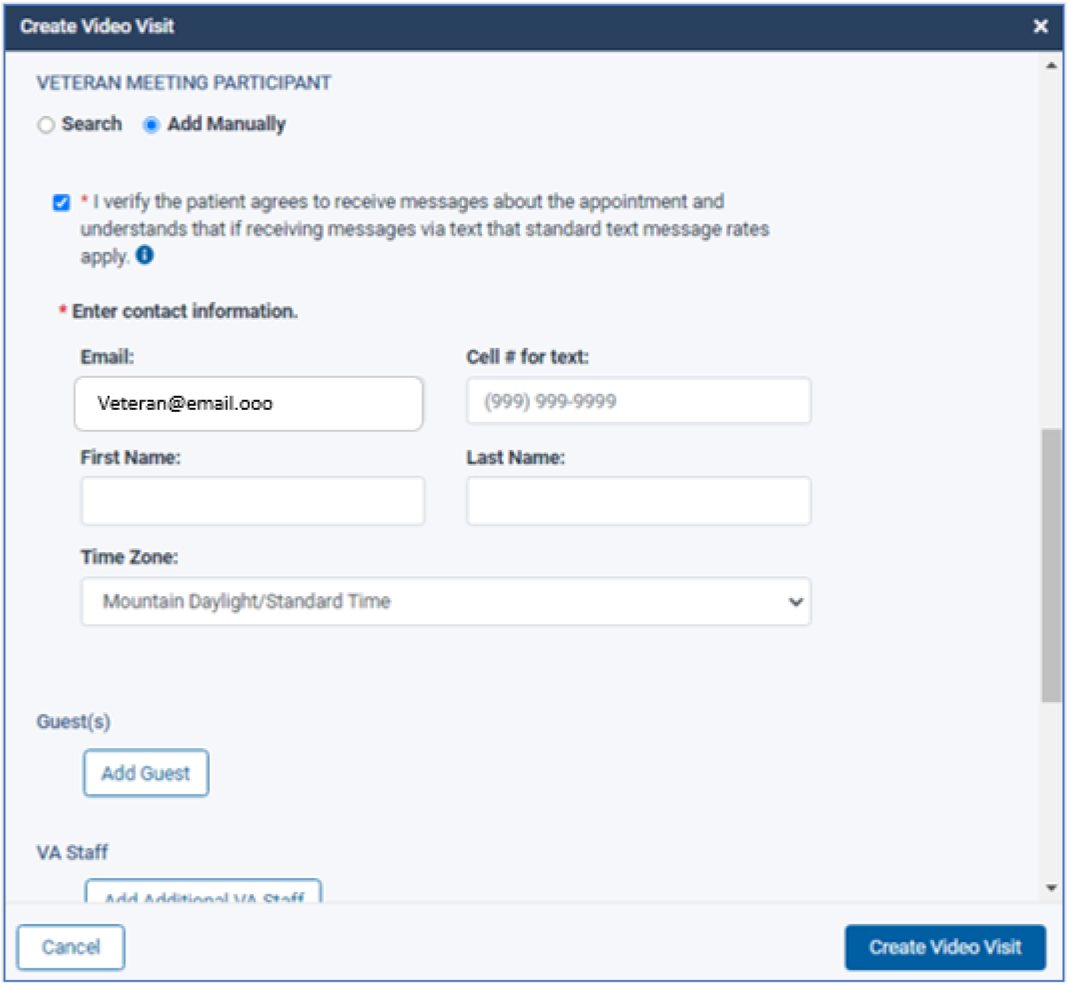


9. Select the email and/or phone number for the patient. Patient contact information displays from the VA.gov profile and from previous VCM appointments. If neither is accurate, a new email and or phone number can be entered. If the patient does not wish to receive text notifications and reminders for this appointment, select None. Information on how patients can update their contact information can be found at: https://www.va.gov/change-address/



10. If you know the patient is not in the VistA facility, select Add Manually directly by selecting the radio button, verify that the patient has agreed to receive email and/or phone messages for the appointment, and then enter the patient information.


Create Video Visit
VETERAN MEETING PARTICIPANT
Search
Add Manually
* I verify the patient agrees to receive messages about the appointment and understands that if receiving messages via text that standard text message rates apply.
* Enter contact information.
Email:
Veteran@email.ooo
Cell # for text:
(999) 999-9999
First Name:
Last Name:
Time Zone:
Mountain Daylight/Standard Time
Guest(s)
Add Guest
VA Staff
Cancel
Create Video Visit

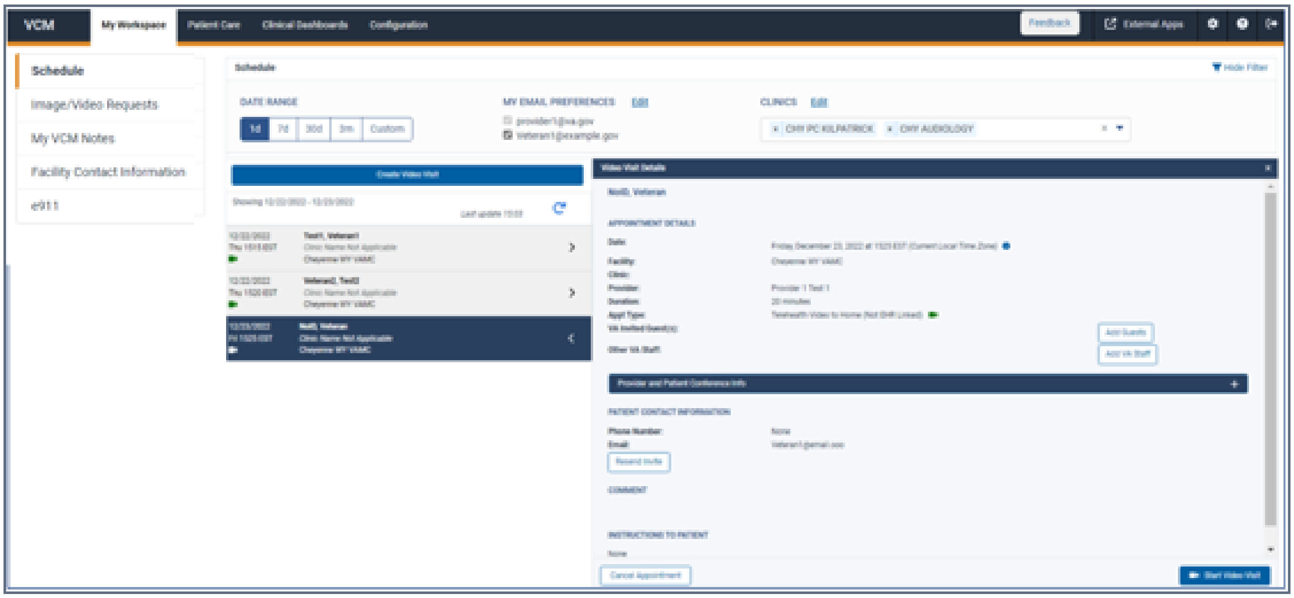


11. Once all required appointment details have been added, select the **Create Video Visit** button to complete scheduling.

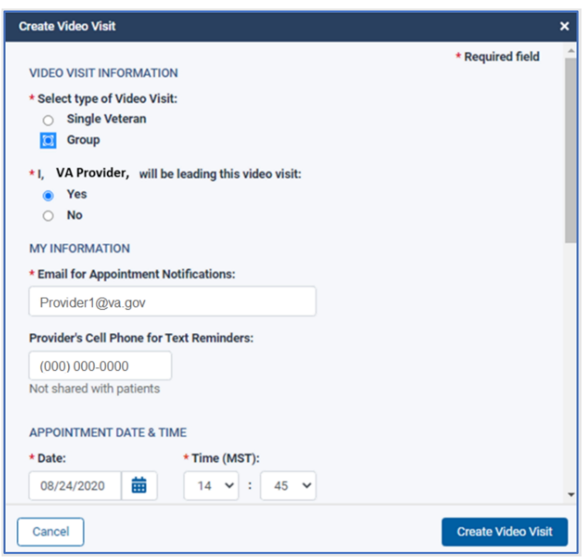
6.1.4 Create New Group Video Visit

To create a new Group Video Visit appointment:

1. On the My Workspace tab, select **Schedule** from the menu on the left. The default viewing pane will display a single-day range for scheduled appointments.



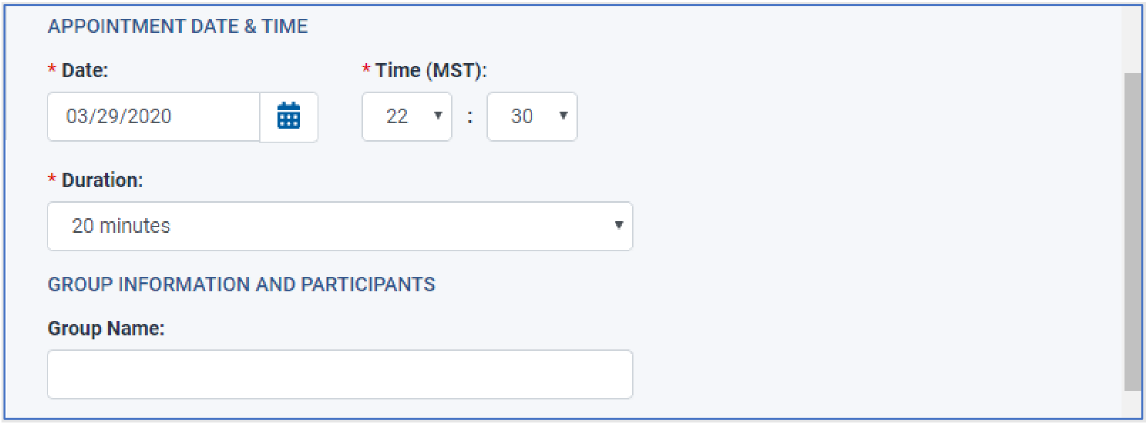
2. Select the **Create Video Visit** button, and the entry form modal will appear.



3. Select the **Group Video** radio-button in the Type of Video Visit field.
4. Indicate who is creating the appointment. The visit information form will default to the **Yes** radio-button, meaning the appointment is for you, the provider.

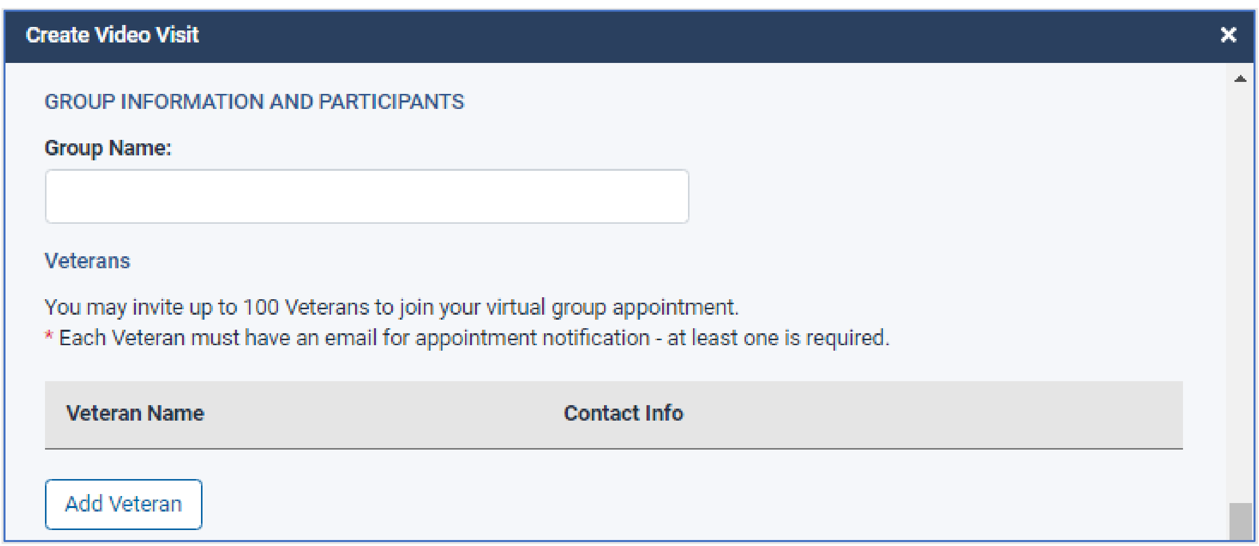
Note: If you are not the provider, you will choose the **No** radio-button in this step, to create the appointment for someone else. Follow the **Steps 2a-d** in *Section 5.2.2 Create New Video Visit*, for images and instructions for creating a group video visit on behalf of another healthcare provider.

5. Add or verify your contact information.

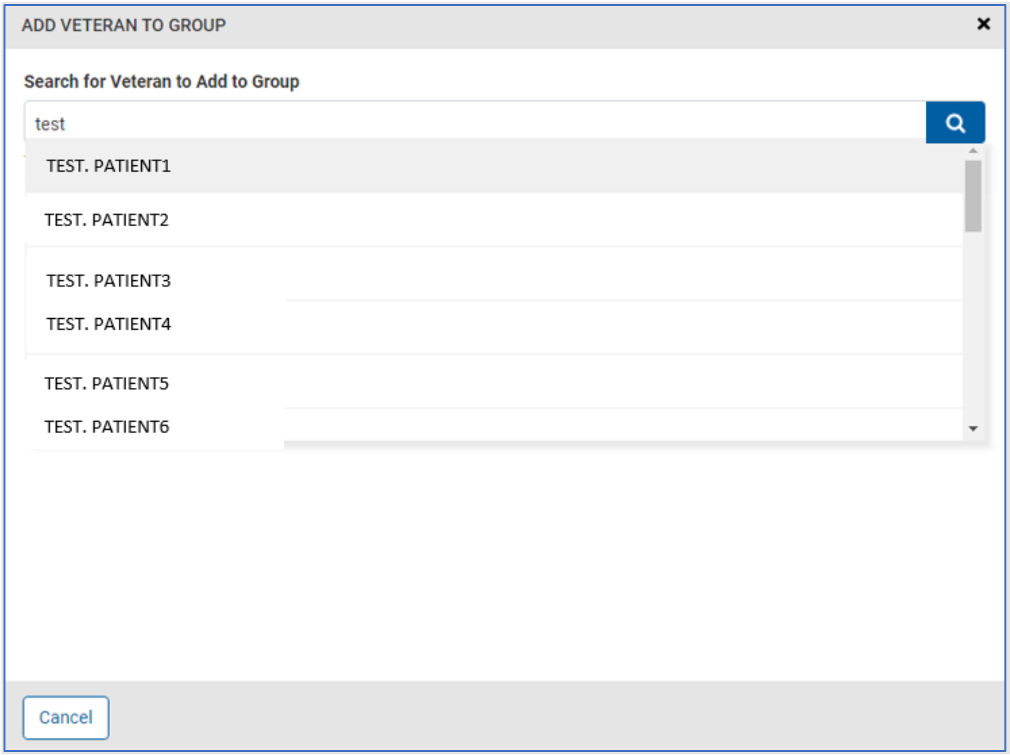


6. Set the date, time, and duration of the appointment. As with a single Veteran appointment you can create more than one appointment at a time by Selecting Add Another Date. The time and duration will be copied from the previous appointment. You must enter a date and can change the time and duration.

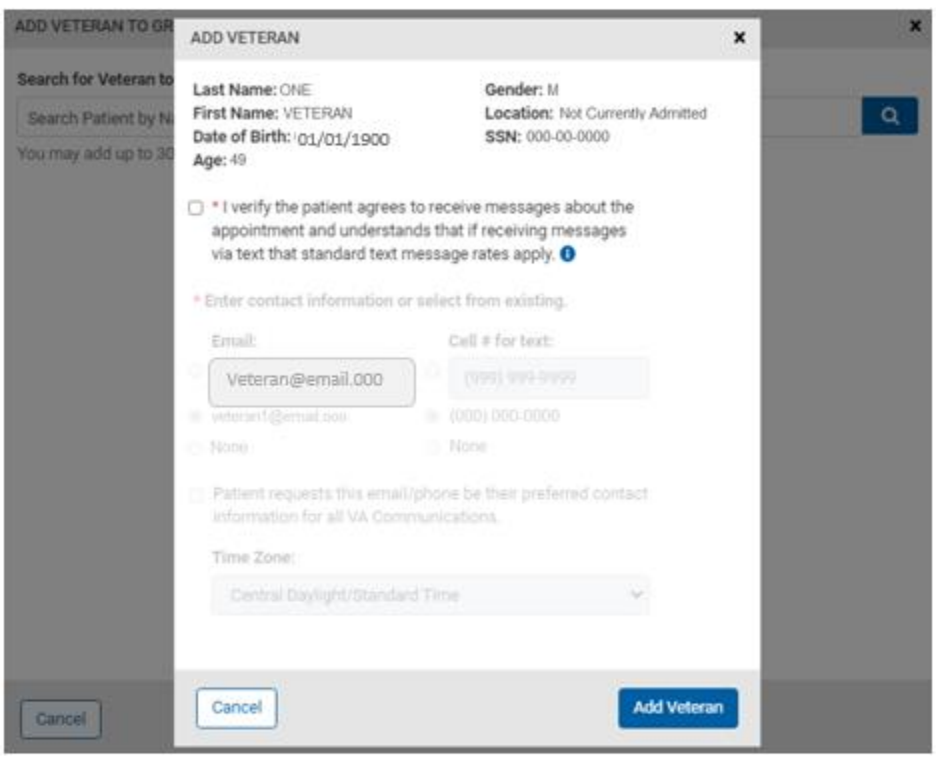
7. Create a group by adding the Group Name.



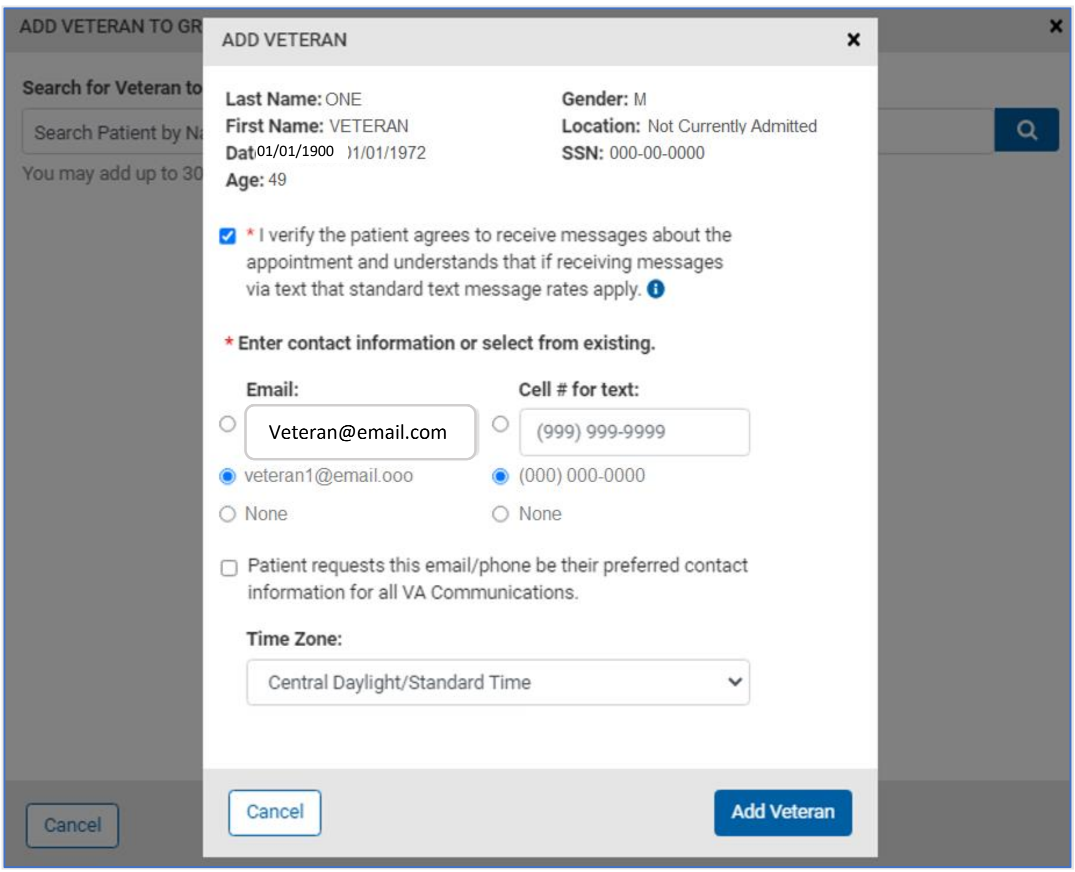
8. Establish the group membership by selecting the **Add Veteran** button to reveal the search field.
9. Begin typing all or part of the **patient's last name** or **Social Security Number (SSN)** (SSN search with or without dashes, OR the "Last Init + SSN Last 4" (e.g., S1234)) in the search field. A drop-down selection list will populate using that criteria.



10. Scroll to search through the results and make a choice or enter more characters to refine the options available. Choose the patient from the list to add them to the group.
    When the patient is selected, verify that this is the correct patient, verify that they have agreed to receive messages.

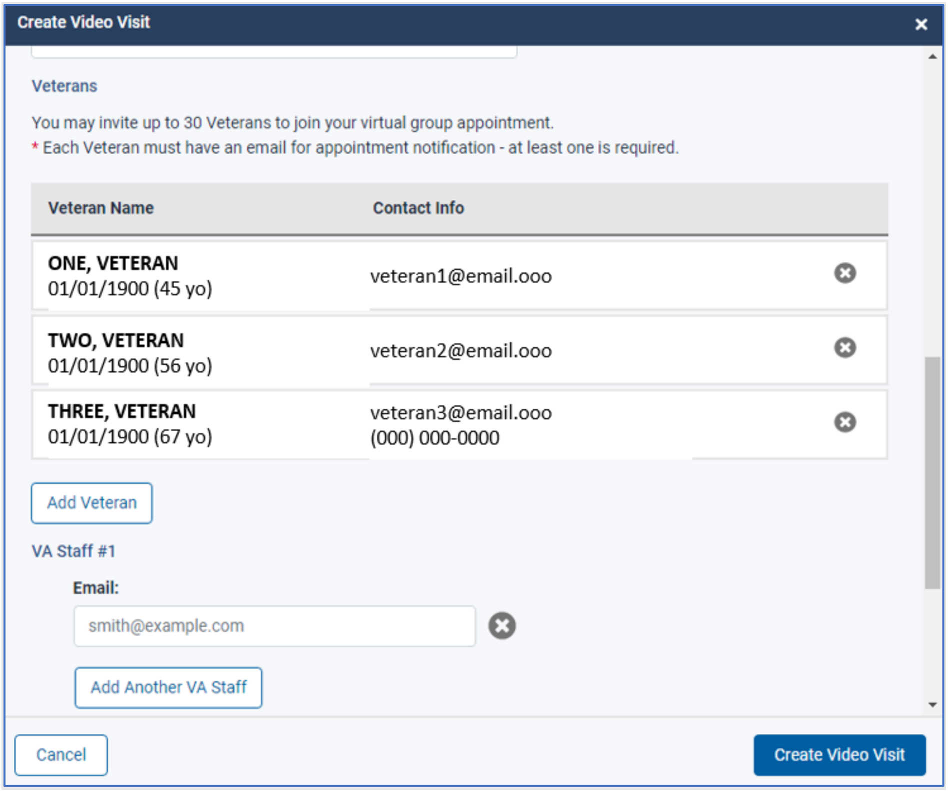


11. Check the box to verify that the patient has agreed to receive communications (messages) about this appointment. Messages can be either email or text. Patients must receive either an email, or an SMS text message, or can elect to receive both.
12. When the box is checked, options for the patient display. Patient contact information from the VA.gov profile will display first. If they have preferences set from previous Video Visits in VCM, that will display next. There is an option to enter a new/different email above these options:
    - Select the appropriate email, or enter a new email
    - If the user has agreed to receive SMS, select the correct phone number
    - If the user has NOT agreed to receive SMS, select None
13. To update the Patient's preferred email and/or phone number, check the box to indicate that the Patient requests this email/phone be their preferred contact information for all VA Communications. When the "Patient requests this email/phone be their preferred contact information for all VA Communications" box is checked, and the appointment is created:
    - The selected email will be updated and only that email will display the next time an appointment is created
    - If a phone number was selected, only that phone will display the next time an appointment is created
    - If "None" is selected for the phone number, the phone numbers will not be updated. The patient will NOT receive a text message for the appointment.

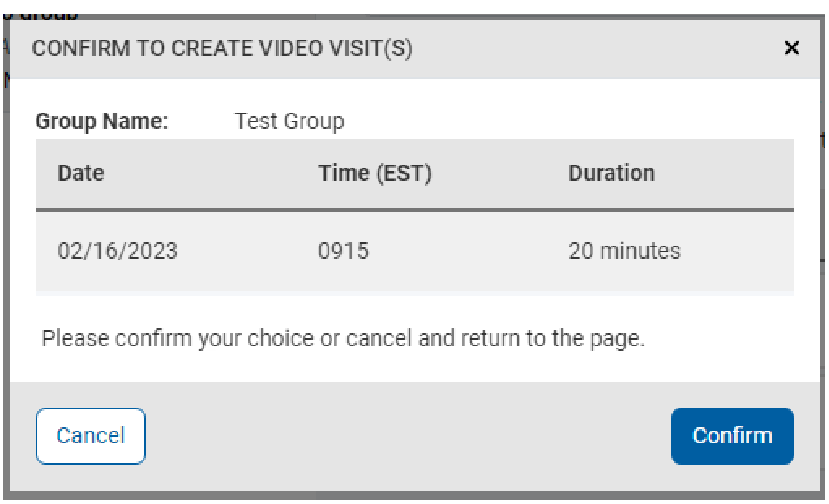


Note: Information on how patients can update their contact information can be found at: https://www.va.gov/change-address/

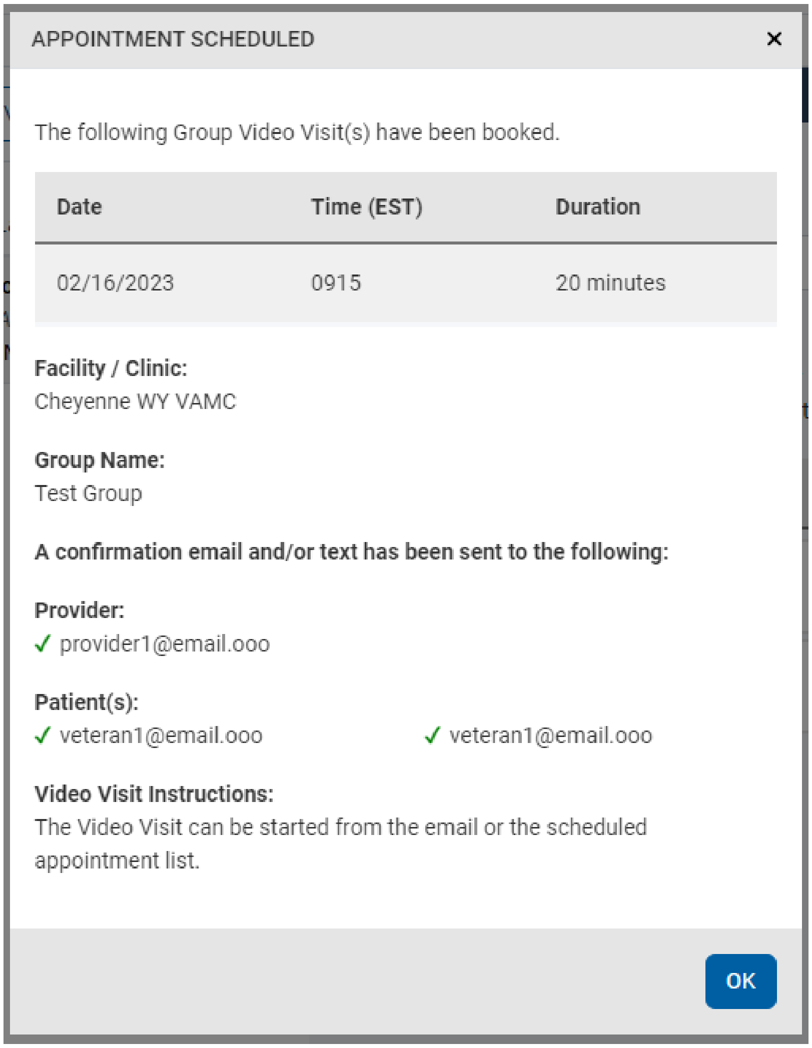
14. Add the Veteran to the group by selecting the **Add Veteran** button.



15. Select the **Create Video Visit** button to create a new appointment for the group displayed.



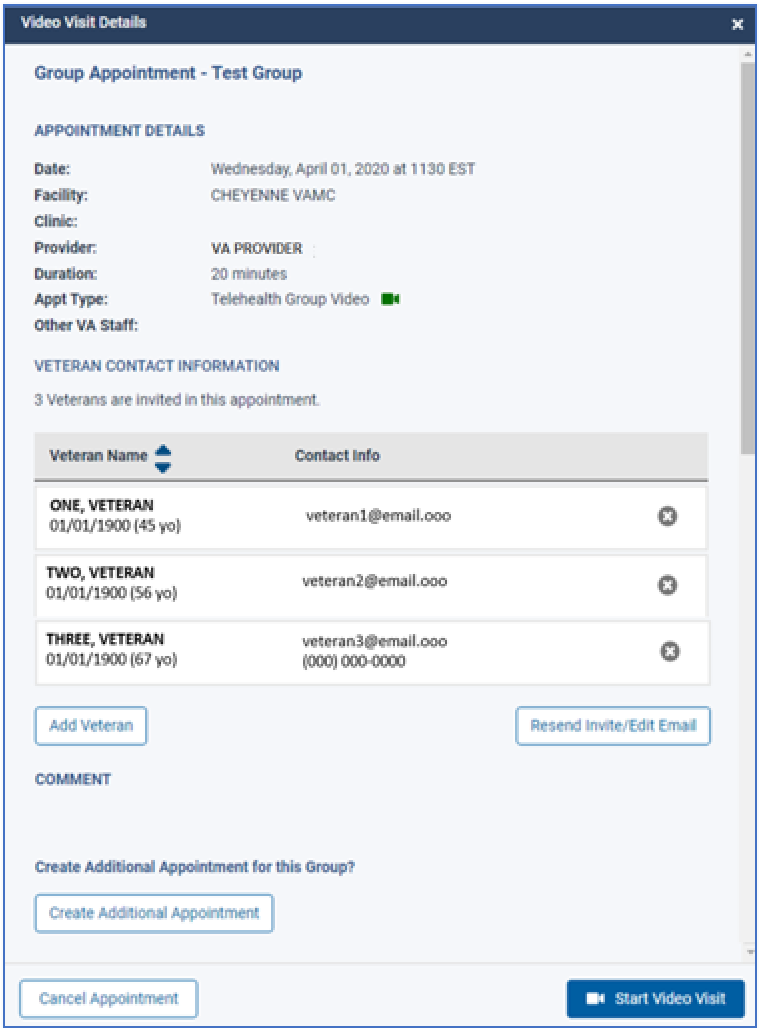
16. In the Create Appointment modal, confirm by selecting the **Yes, Create** button. The appointment confirmation modal will display.



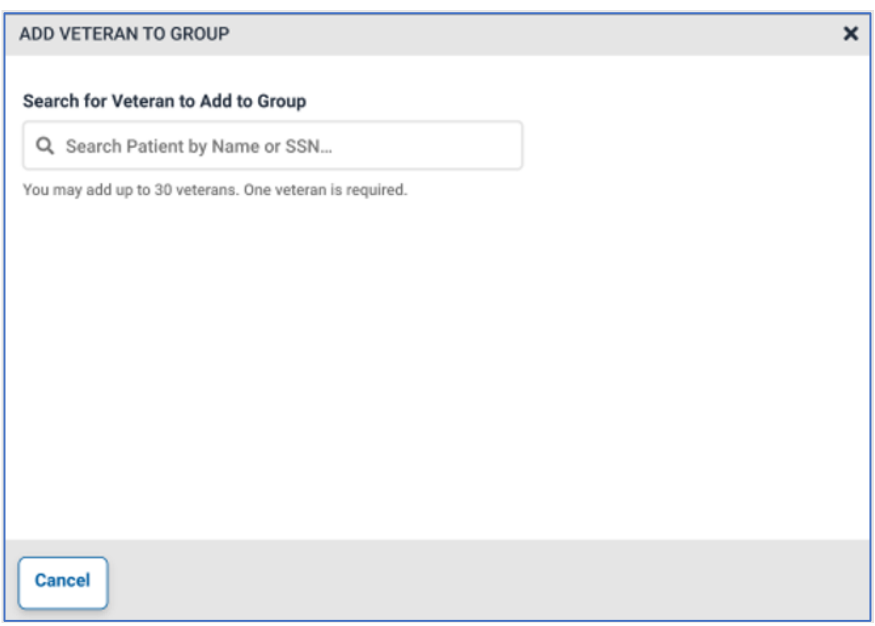
If the date of the Video Visit just created is outside the currently filtered Date Range, a growler displays at the top right of the page.

6.2 Managing Group Participant List

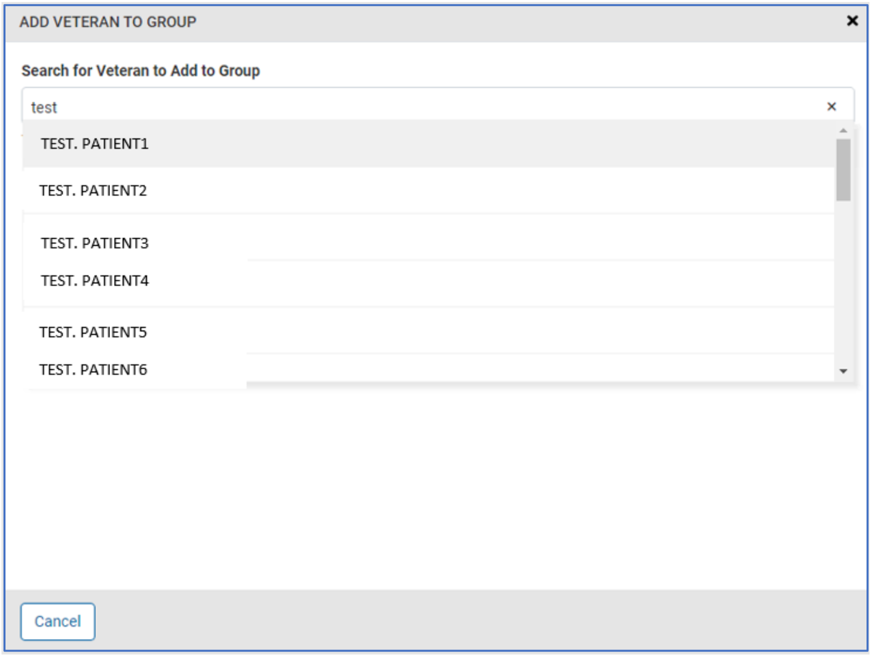
The group appointment video visit summary view provides the choices to Add Veterans to the group appointment, or to Resend Appointment Invitations to attendees.



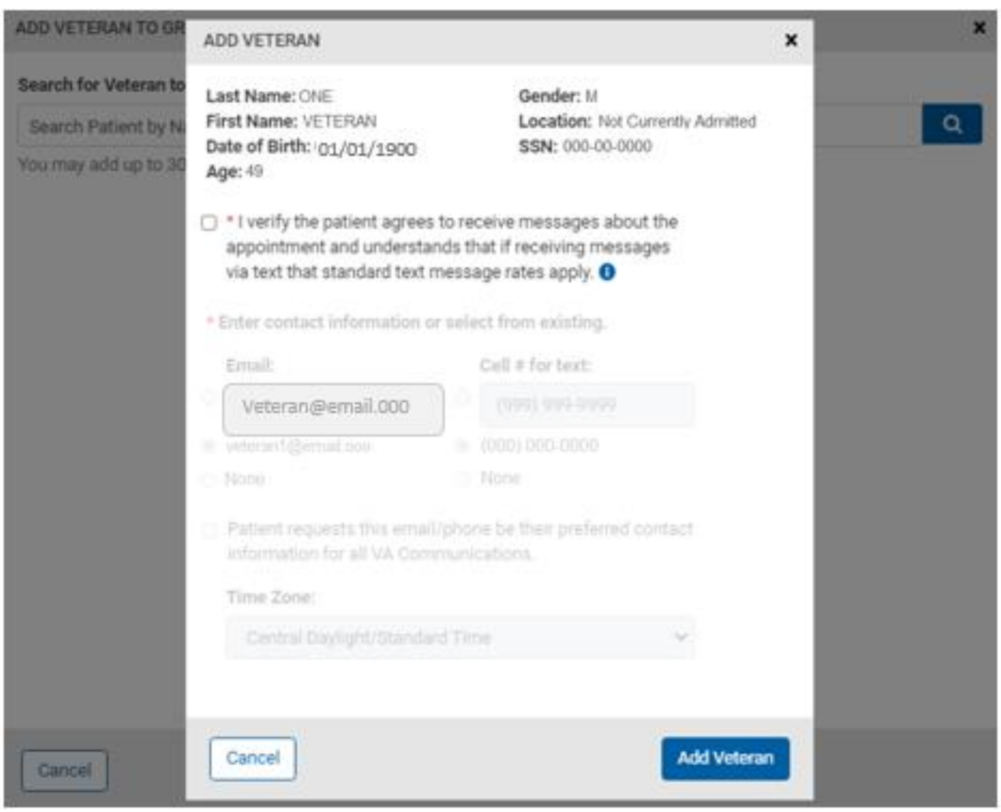
1. Select the **Add Veteran** button to access the patient search form.
2. Begin typing all or part of the **patient's last name** or **Social Security Number (SSN)** (SSN search with or without dashes, OR the "Last Init + SSN Last 4" (e.g., S1234)) in the search field.



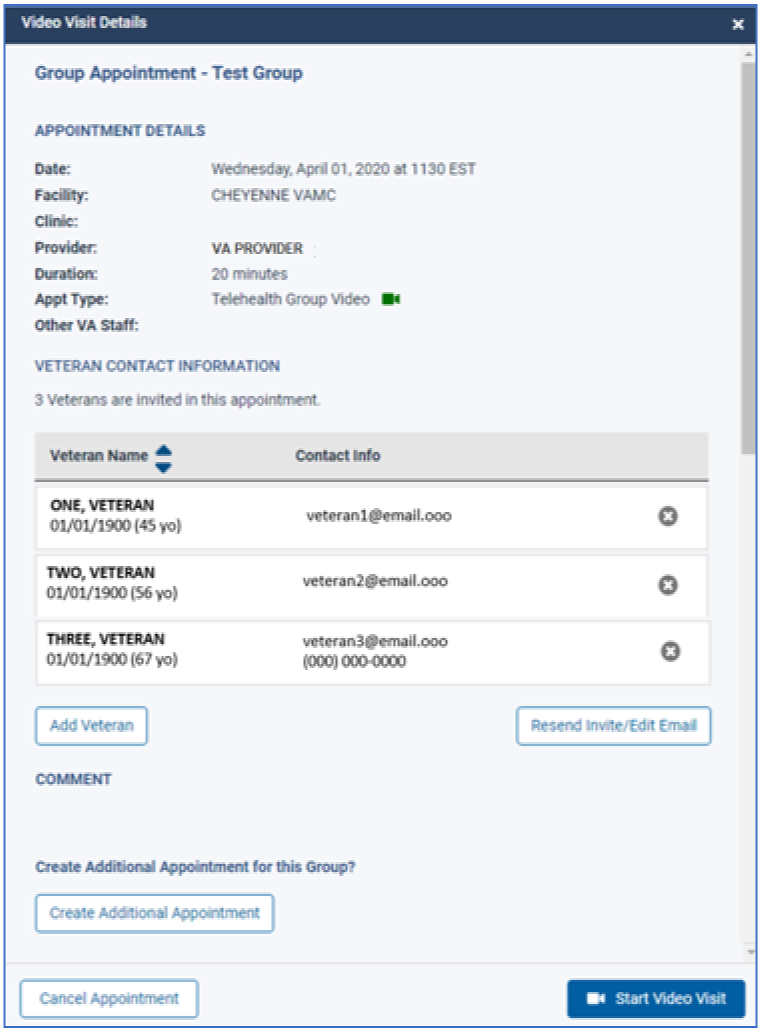
3. A drop-down menu will appear, generated by the characters typed in the search field. Enter more characters to narrow the search.



4. Scroll through the results to find the name, select it, and then select the **Update Group** button to view the Add Veteran contact information modal.



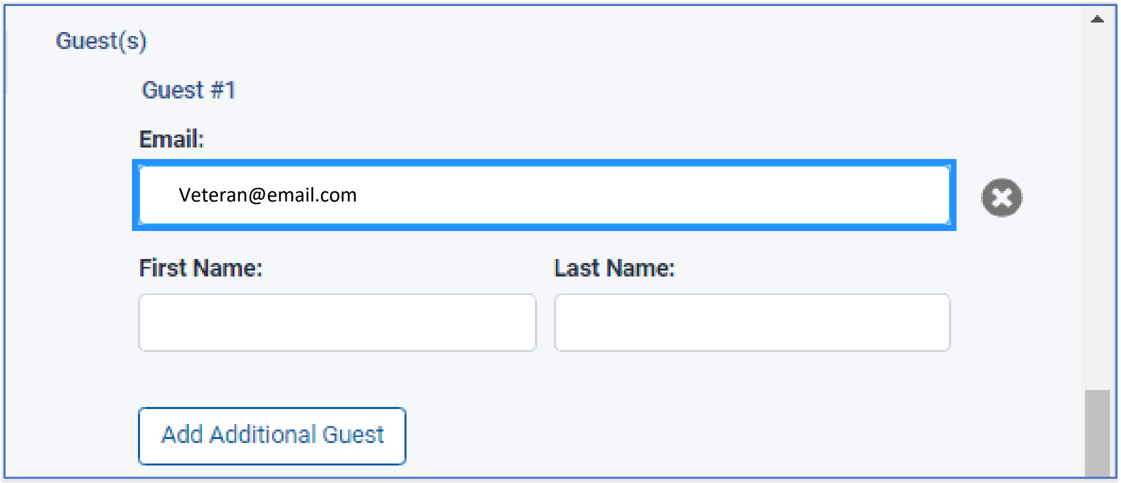
5. Add, verify, or adjust contact information as needed, then select the **Add Veteran** button to add the Veteran to the appointment. The name will be added to the list on the appointment details screen.



The sort arrows next to the Veteran Name label can be used to sort the Veterans invited to the group Video Visit by descending or ascending alphabetical order.

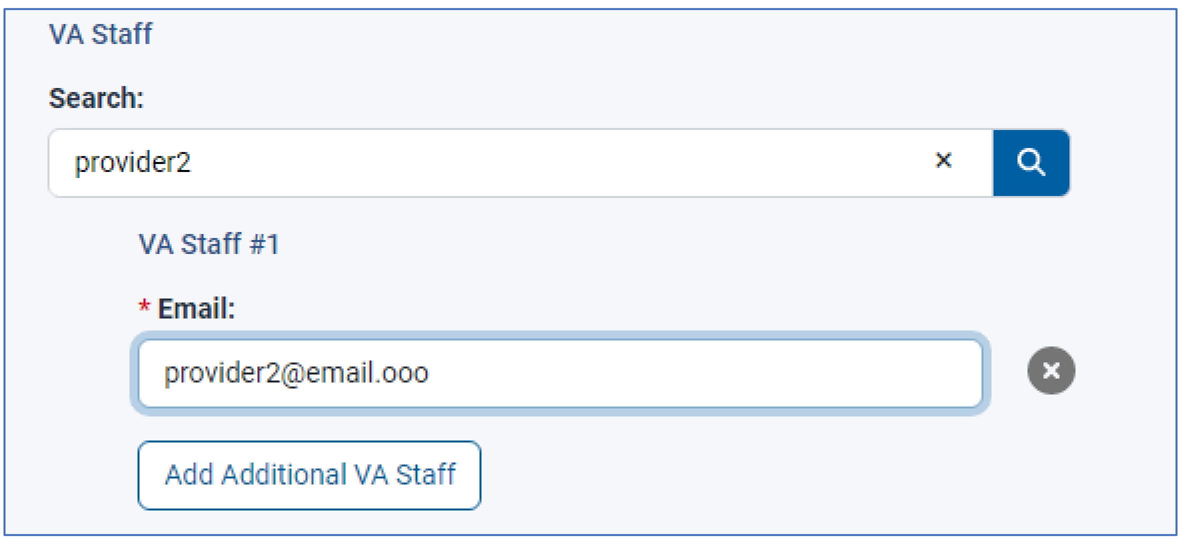
6.3 Guests

When creating a Video Visit for an email-only Veteran, Guests can be invited to participate. Guests are not supported for Group Video Visits. The Guest email is required. First and Last Name are optional. Invited Guests will receive an email Notification of the Video Visit Notification and will join the Video Visit in a Guest role. Up to 5 Guests can be invited.



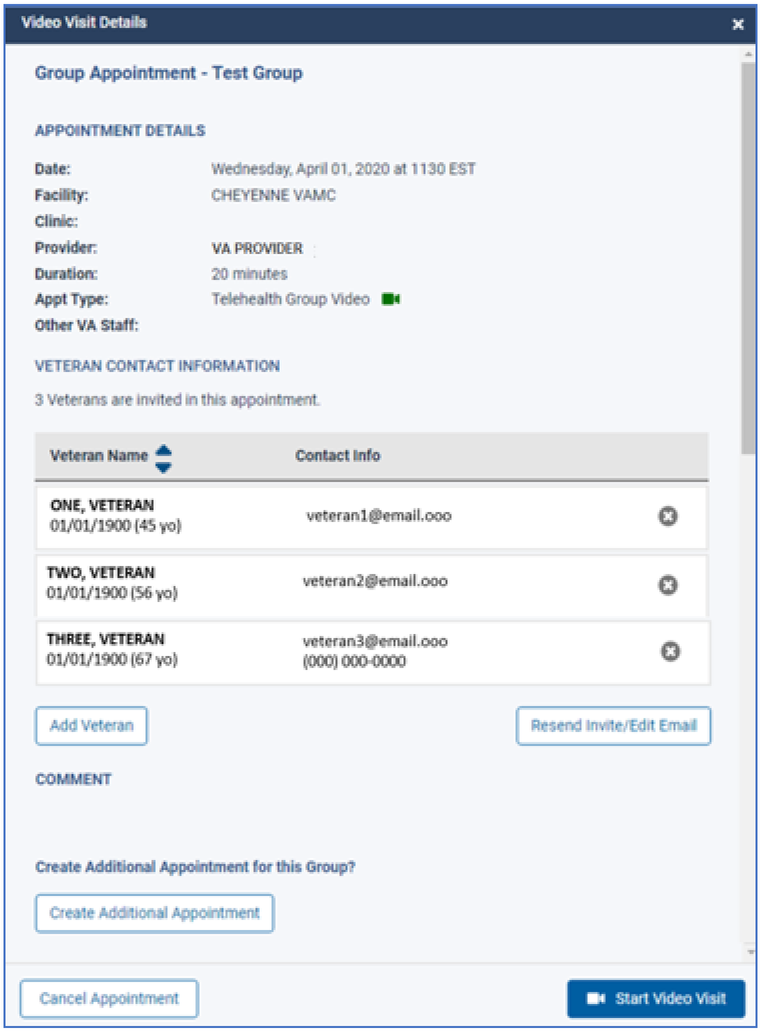
6.4 VA Staff

When creating a Video Visit for an email-only Veteran or a Group, additional VA Staff can be invited to participate. Additional VA Staff will receive an email Notification and will join the Video Visit in a Host role. Up to 5 Additional VA Staff can be invited.



6.4.1 Details View

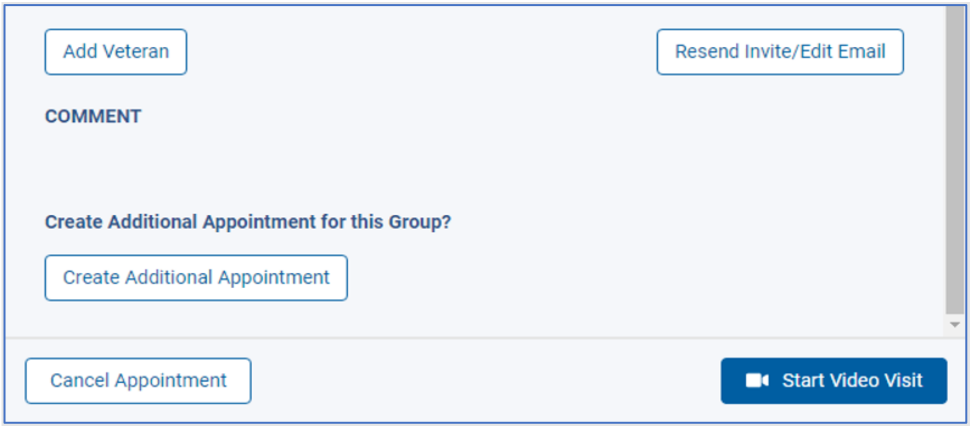
On the group appointment details view, multiple group visit management choices are available, which allow you to manage appointment attendance, notifications for attendees, future appointments with the same group, and the ability to start the video visit appointment.



There is a bar below the attendee table “Provider and Patient Conference Info”. When selected, conference information displays. The Meeting Alias and Patient PIN can be shared to a Patient in the group visit so that they can manually enter the visit. To invite another VA Staff/Provider, the Meeting Alias and Provider PIN should be shared. The Provider PIN should not be shared with a Patient.

6.4.2 Copy Appointment (Create Additional Appointment)

To create a new appointment based on an existing group:



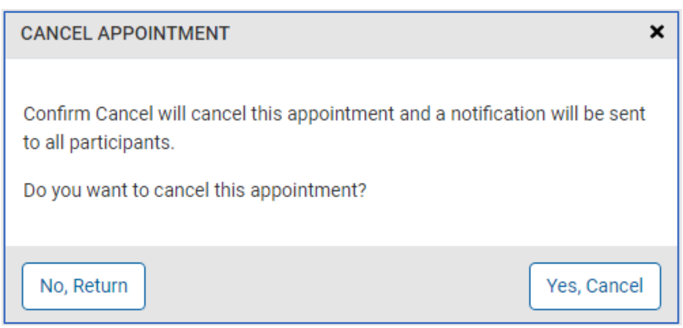
1. While on an appointment details screen for the group, select the **Create Additional Appointment** button toward the bottom of the screen, to copy the attendance of the meeting into a new appointment.

2. Follow the steps in Section *6.1.4 Create New Group Video Visit*.

6.4.3 Cancel Appointment

To cancel a group appointment:

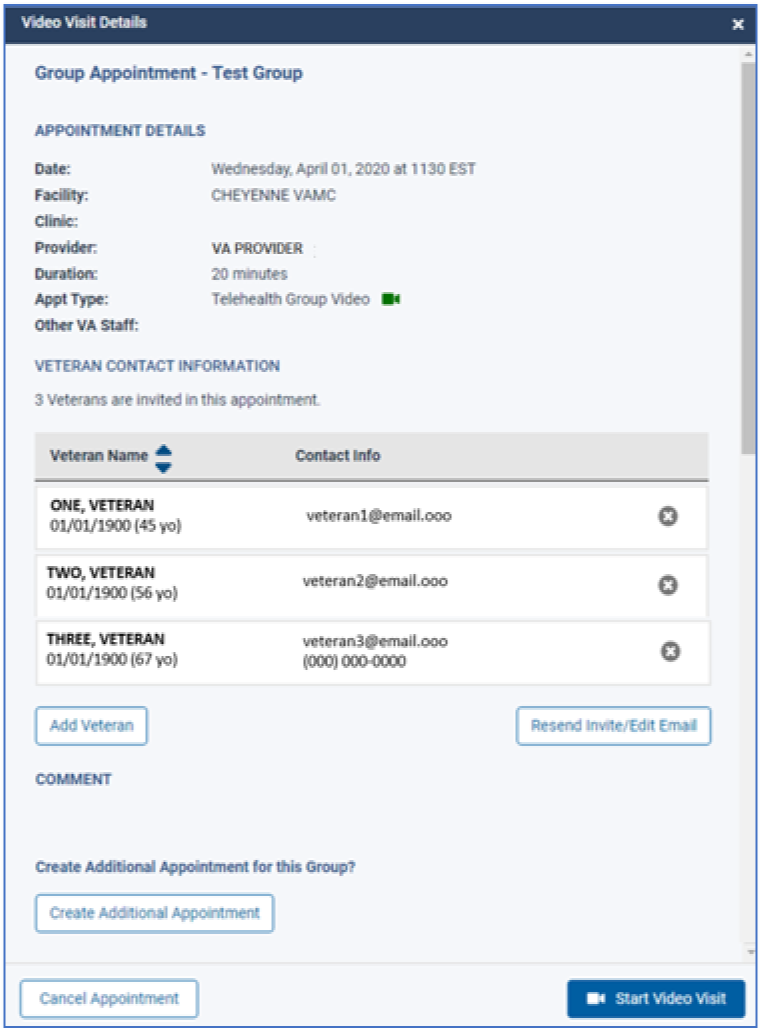
1. While on the details screen for the appointment, select the **Cancel** button at the bottom of the screen.
2. A confirmation modal will appear, giving you the opportunity to stop the cancelation before proceeding. Select the **Yes, Continue** button to proceed.



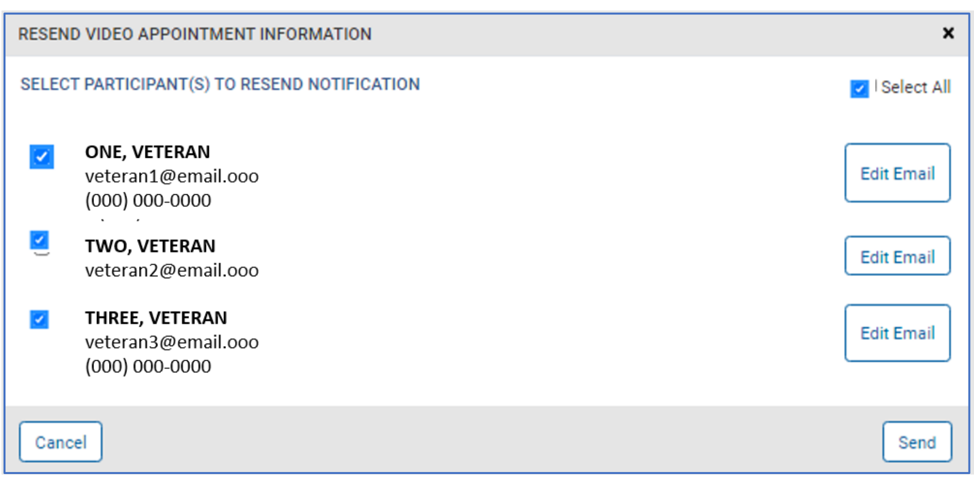
6.4.4 Resend Video Appointment Information

To resend an invitation for a group appointment, or to adjust the attendee contact information:

1. Access the Appointment Details view for a group appointment. (see Section *6.4.1 Details View* for more information)

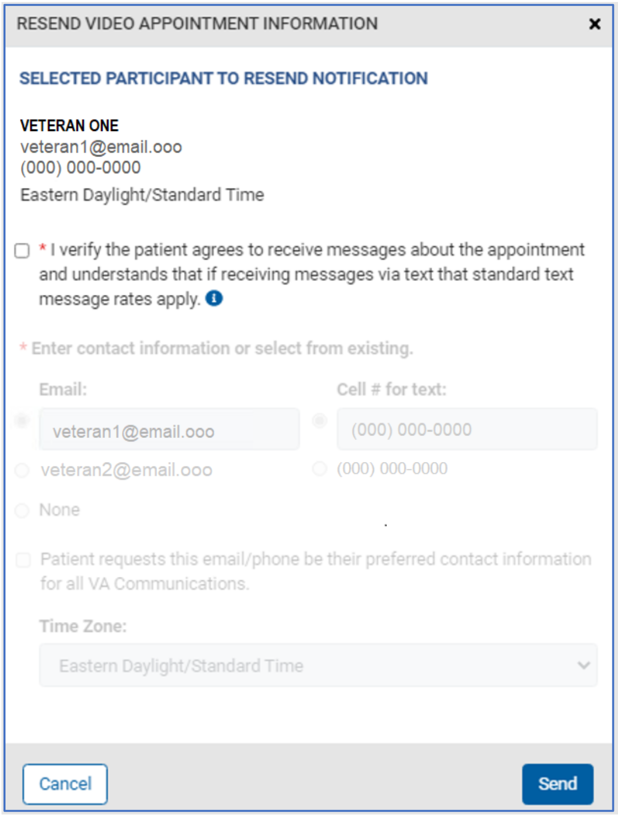


2. Select the **Resend Invite/Update Email** button below the participant list, for the Resend Video Appointment Information modal to appear.

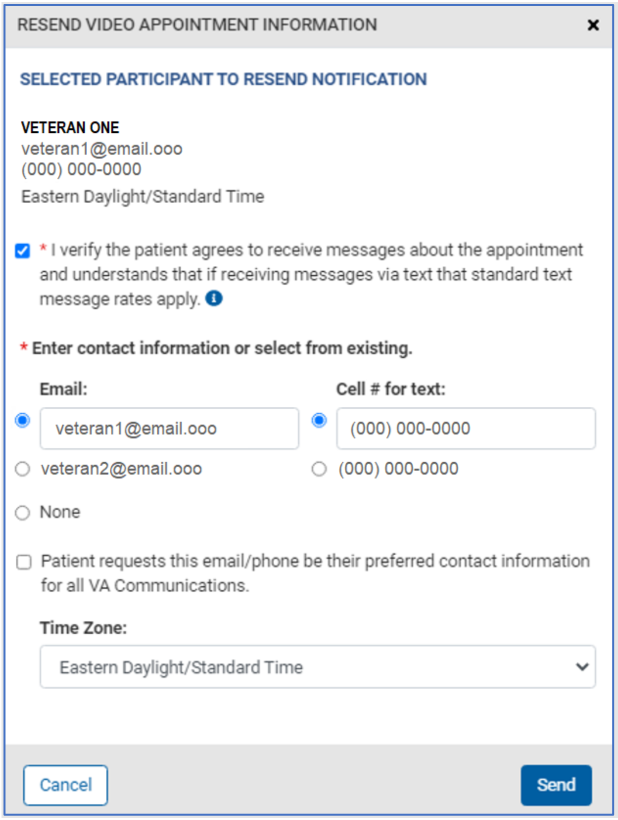


3. Verify the names and emails displayed. Revise the contact information as needed by selecting the **Edit Email** button for the participant that needs to be modified. An editable field will appear below their contact information, for you to modify the email address after the checkbox to verify that the patient agrees to receive messages has been checked.

Note: Any saved modifications to the email will automatically result in the generation of a new video visit access link going out to all attendees, regardless of whether their name has been checked. The new link ensures only the intended recipients have access to the appointment.

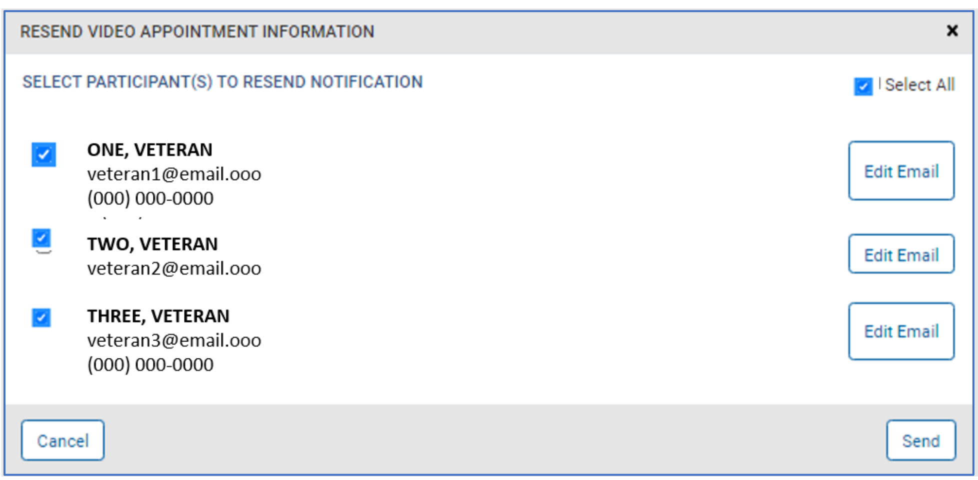


4. Below the email editing field, use the **Update email of record for future Video Visits** checkbox to verify whether the updated email should now become the default record for all future Video Visits for the participant.



5. Verify and adjust emails of other participants, if needed.

Schedule Manage Video Visit. The user can select the check box to resend to all veterans in the group.

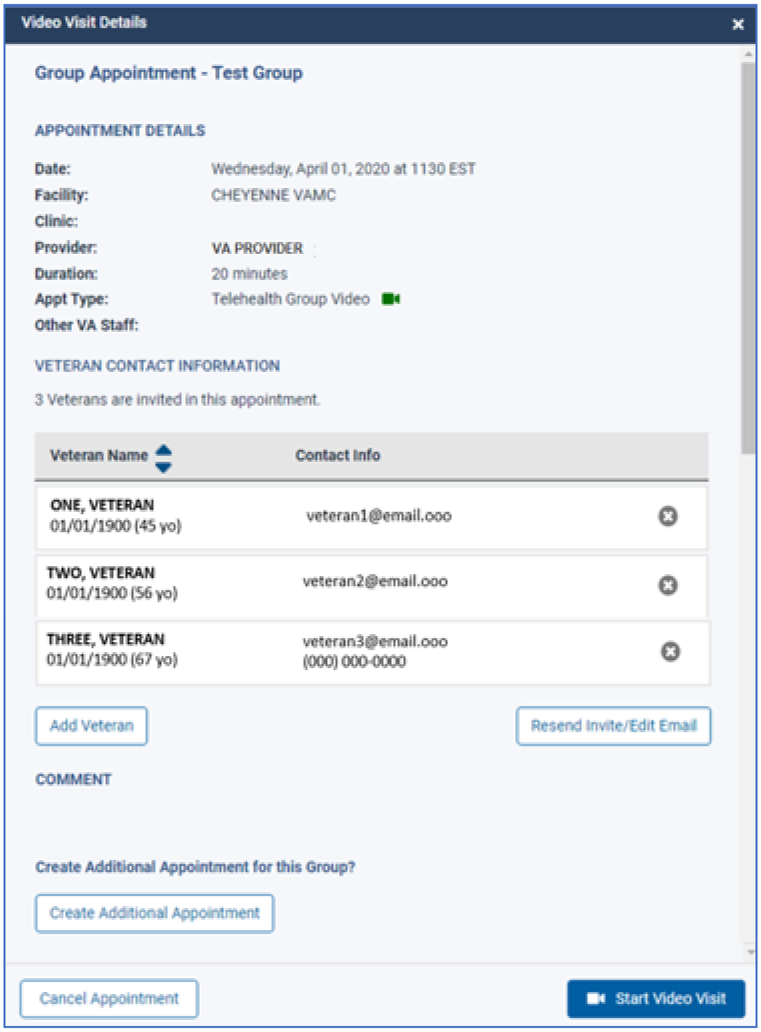


6. Select the **Send** button once changes are complete, and all participants will receive a new, unique link to the group video visit appointment.

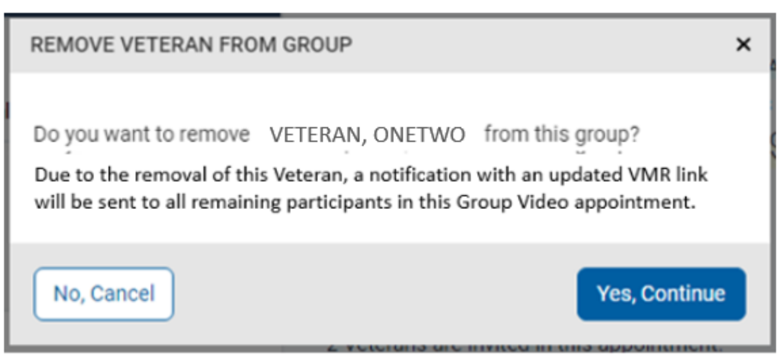
   Note: If no changes were made to the contact information, only those participants with a selected checkbox will receive a resent notification, and it will include the same URL that originally went to the group.

6.4.5 Remove Group Video Visit Attendees

1. Revise the attendee list for a group video visit, by selecting the "**X**" on the right side of the name to remove it.

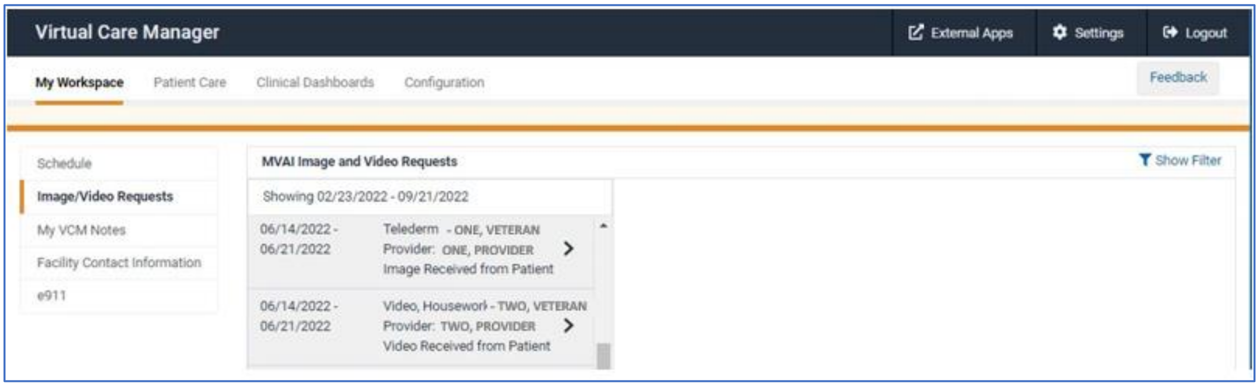


2. A confirmation modal will appear. Select the **Yes, Continue** button to complete removal of the participant. The participant will receive a cancellation email and/or text message.

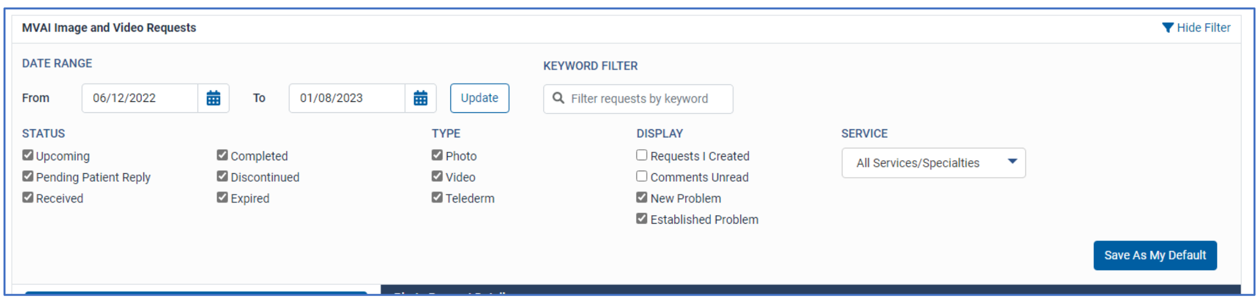


6.5 Requests

Requests allows the VCM user to search for Photo, Video or Telederm Requests that have already been created and submitted to Veterans.

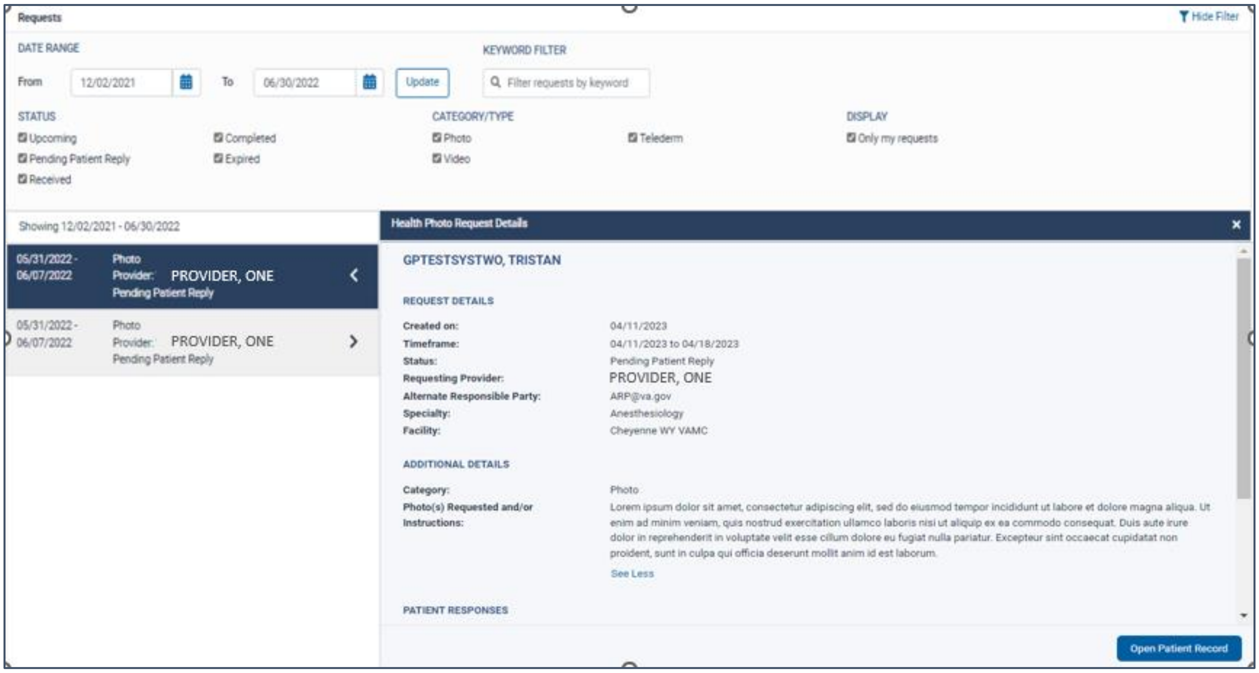


Selecting “Show/Hide Filter” allows the user to display filters to support the search for a previously submitted Request. Filters include date range of the Request, as well as Status, Type (Photo, Video or Telederm), the option to display “Requests I Created”, Service/Specialty, as well as the option to filter by keyword to further narrow the search. All filters are optional, but selecting a number of filters may help narrow the search.

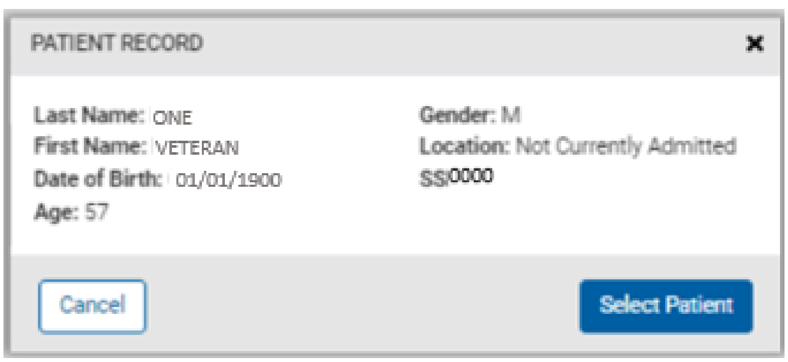


Once the filters have been selected, the user is presented with options that meet the specific search criteria. The results display in List View, where the user may select one of the submitted Requests for review.

To customize a filter set to see preferred requests by default, select the Status, Type(s), Display and Service/Specialty, then select “Save As My Default”. These filters will be saved as default for the user and when they return to Image and Video Requests in My Workspace, the image requests in the list view will be based on these saved filter selections.

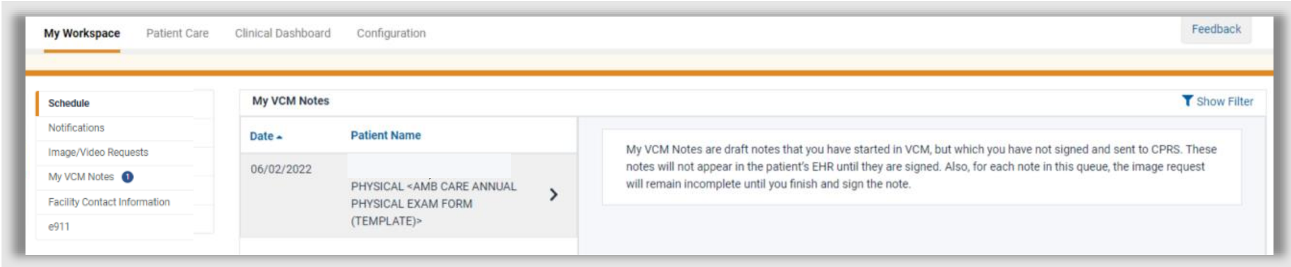


Once the desired Request has been found, the user may opt to “Open Patient Record” and “Select Patient” to navigate to the Patient’s record in Patient Care, where other patient-specific options are available, such as “Appointments”, “Patient Data” and “Conditions Graphs”.

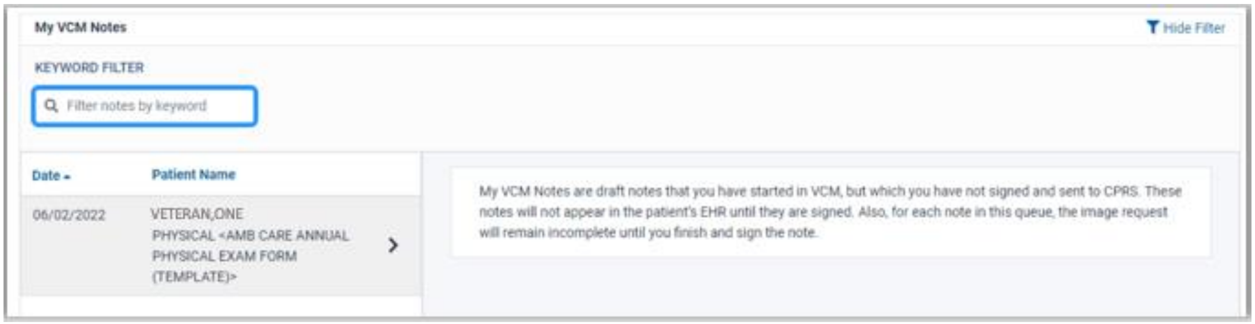


6.6 My VCM Notes

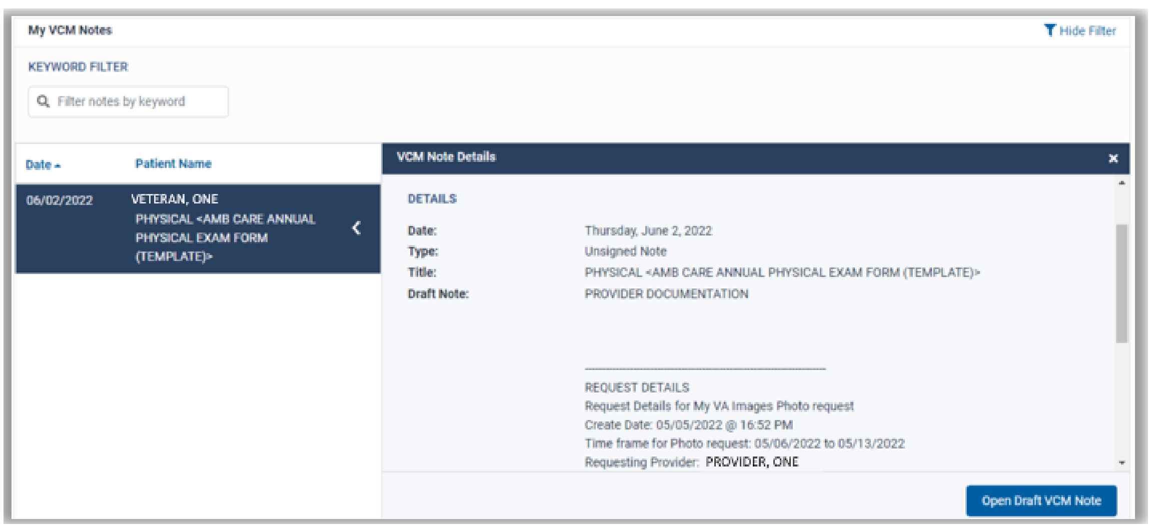
My VCM Notes are draft notes that have been started in VCM but have not been signed and sent to CPRS. These notes will not appear in the patient’s EHR until they are signed. For each note in queue, the image request will remain incomplete until the note is finished and signed. A notification will populate in the left navigation bar next to “My VCM Notes”, indicating the number of draft notes that are available for review.



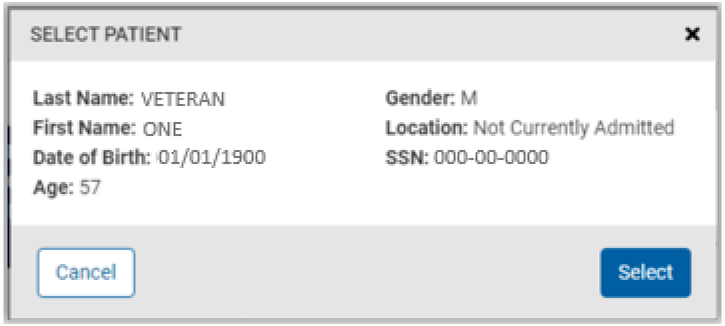
Show/Hide Filter allows the user to access the Keyword Filter which can be used to search for the desired patient's draft note by name or other key word.



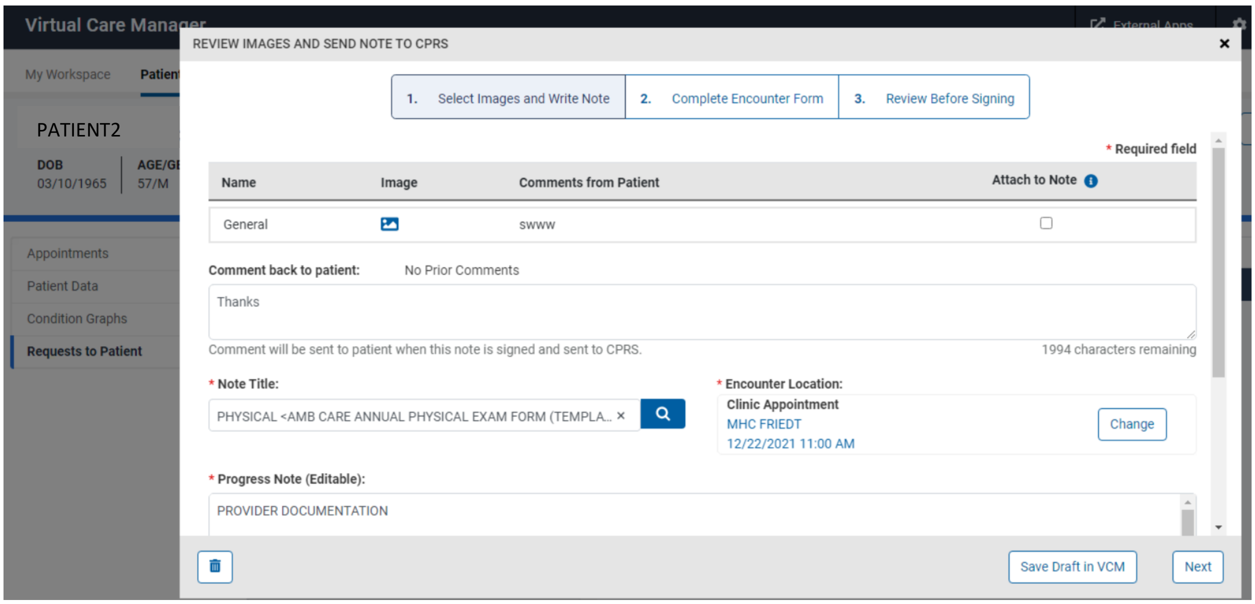
Once the patient's draft note has been found, the name patient can be selected in List View and the VCM Note Details will be displayed, so that the draft note can be easily reviewed. Select "Open Draft VCM Note" to make edits to the draft or take additional actions on the note, such as completing and signing the note.



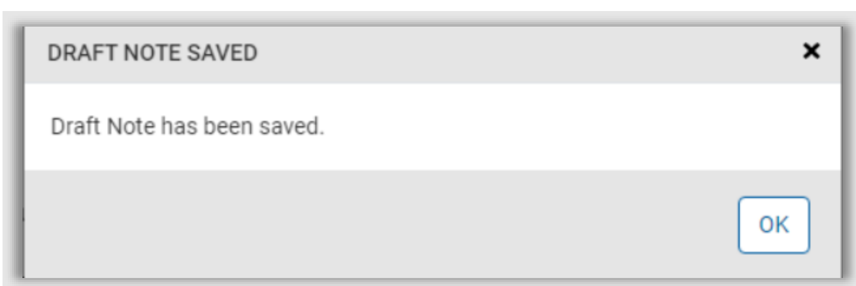
Click "Select" in the Select Patient modal to make edits or take additional actions within the draft note or click "Cancel" to return to the List View for My VCM Notes.



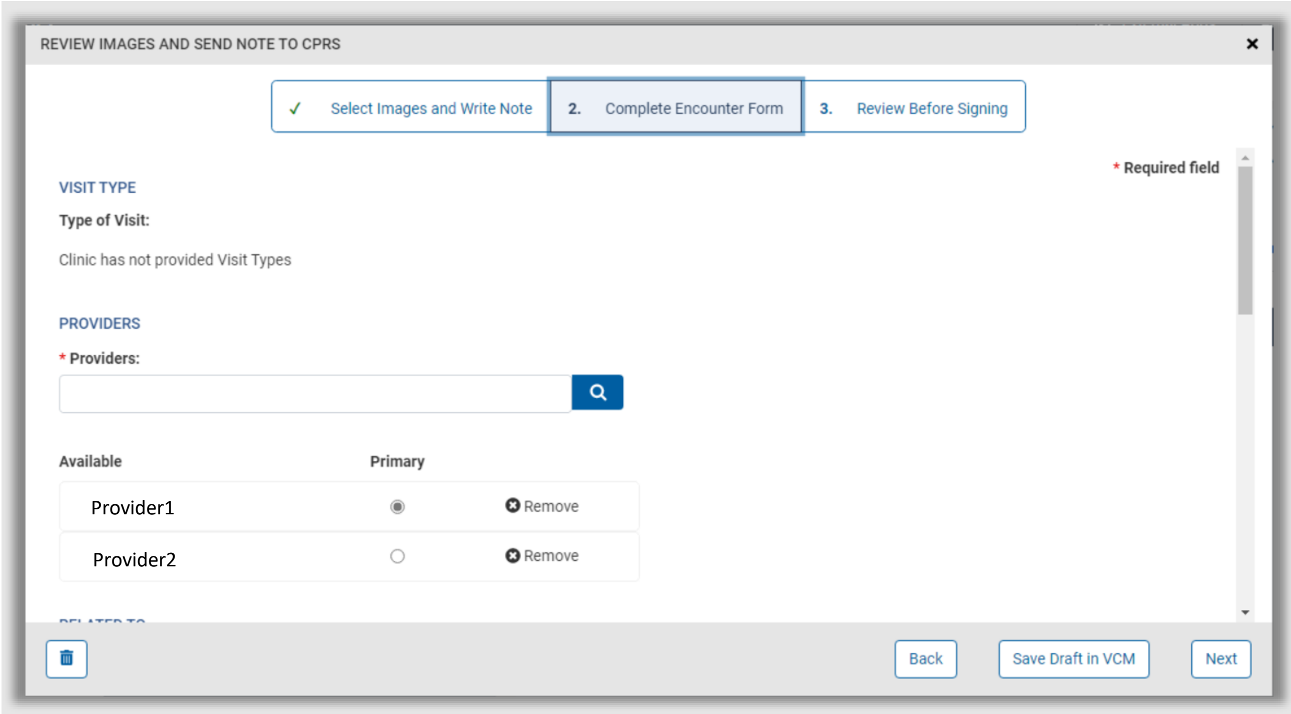
Clicking “Select” opens the draft note in Patient Care for the Patient in Context. Here, edits may be made as needed to each section of the note.



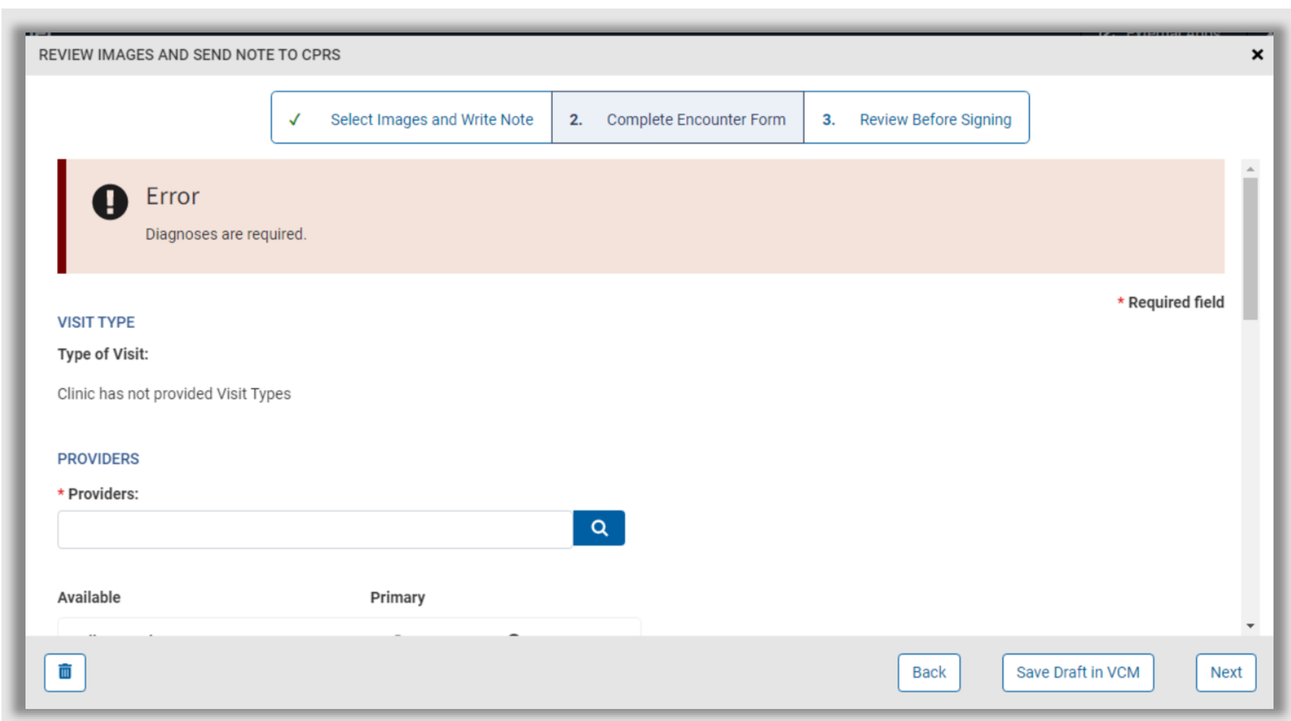
The note may be saved by clicking “Save as Draft in VCM”. A modal will appear to confirm that the draft note has been saved.



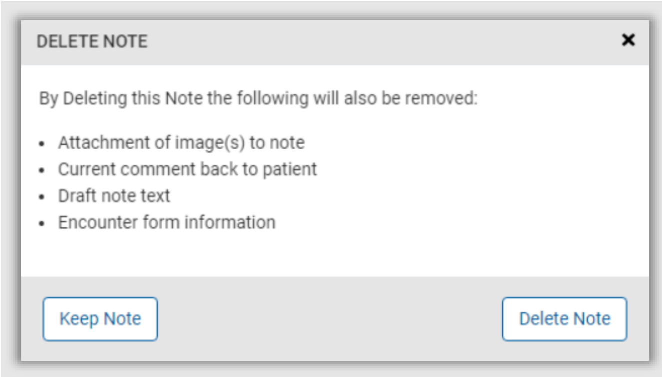
Click “Next” or “Back” to navigate to all sections of the draft note.



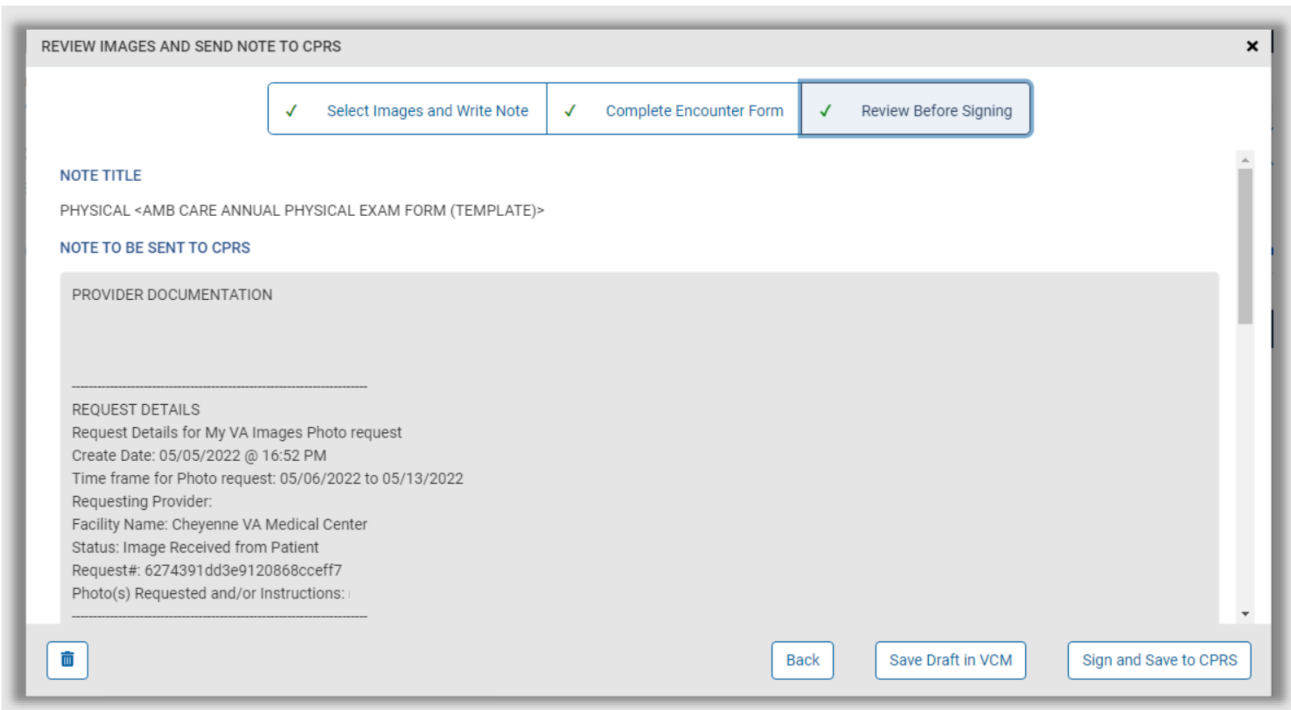
An error alert will occur if required fields are not populated. Required fields are indicated by a red asterisk.

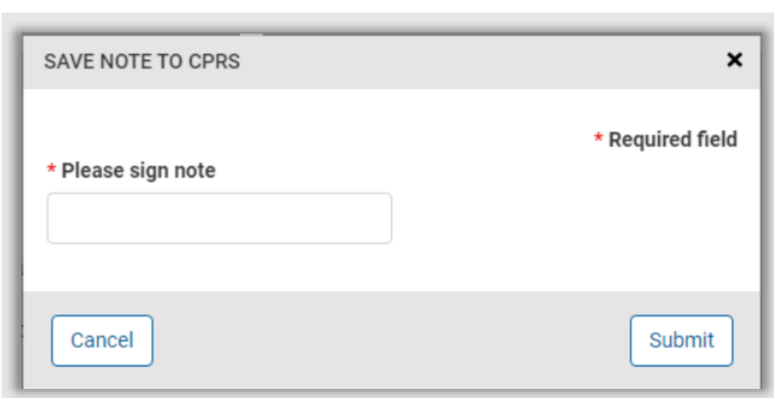


Within any section of the draft note, the trash-can icon may be selected to delete the draft note. A Delete Note modal will appear with the following considerations listed before deleting the draft note. The user may opt to “Keep Note” or “Delete Note”.



In the third tab of the draft note, “Review Before Signing”, the option to “Sign and Save to CPRS” is available. Selecting this option displays the “Save Note to CPRS” modal. Here, the note can be electronically signed and submitted. The note has been successfully submitted and will no longer appear as a draft note in “My VCM Notes” in My Workspace.



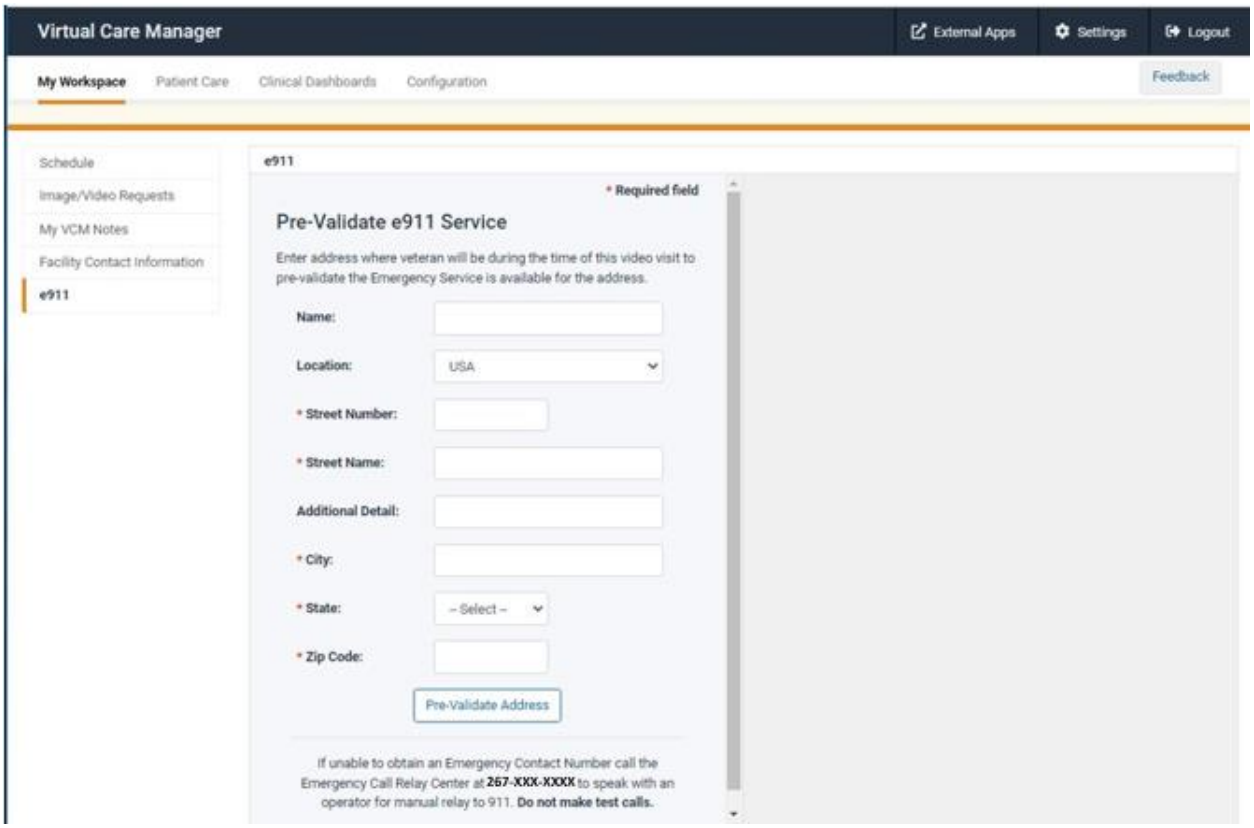


6.7 e911

The e911 feature in VCM provides a 24/7 service for:

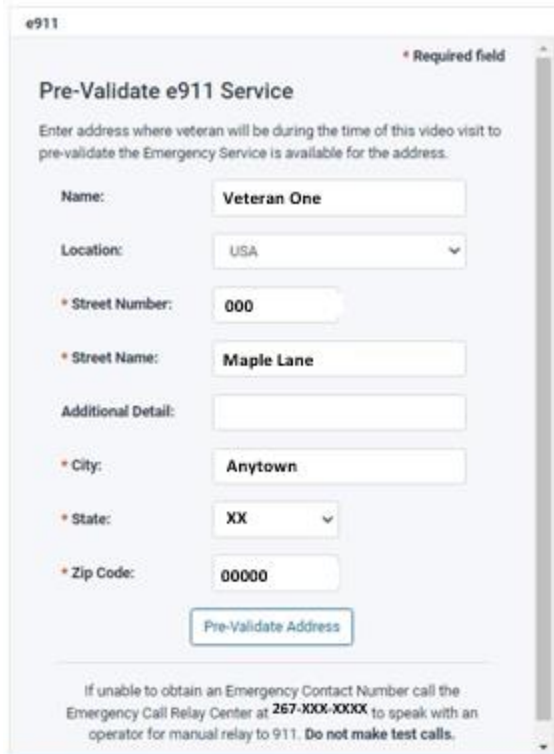
- Pre-validating whether 911 service is available at a patient's location during the time of the video visit
- Obtaining a temporary phone number to dial, valid for 10 minutes for 911 at the pre-validated location
- In the continental United States, Hawaii, Alaska, Puerto Rico, the U.S. Virgin Islands, Guam, American Samoa, Saipan, and the Northern Mariana Islands.

NOTE: Do not make test calls!



6.7.1 Set Patient Location and Address Information

1. Enter the patient's name.
2. The default location is USA and other locations can be selected from the dropdown list, including American Samoa, Guam, Northern Mariana Islands, Saipan, and US Virgin Islands.
3. Enter Street Number, Street Name, Additional Detail, City, State, and Zip Code.
4. **Select Pre-validate Address** to validate if e911 is available.

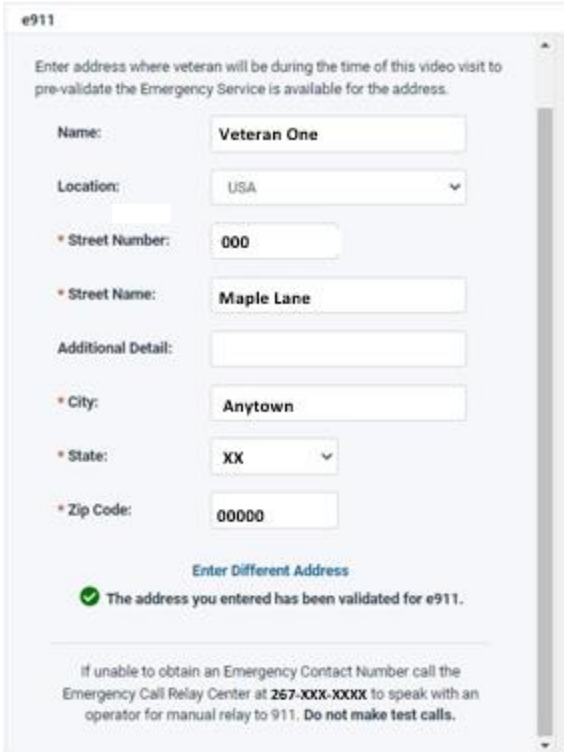


5. Verify the Address is Validated for e911**.** If the address entered has 911 service, then a green checkmark will appear at the bottom, stating:

   "**The address you entered has been validated for e911.**"

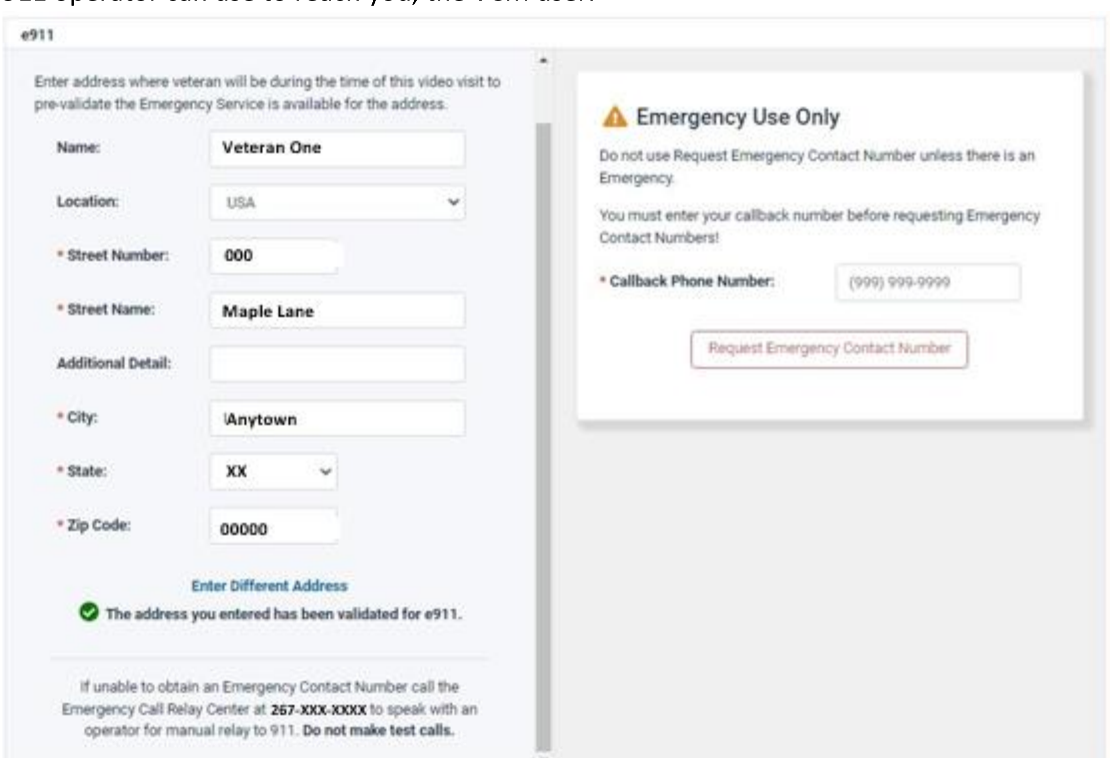
   To enter a different address after validation, select Enter Different Address.

   If any changes are made to the validated address, the "address validated" text clears and the Pre-Validate Address button is available. To enter a different address, select Enter Different Address.



6.7.2 Emergency Use of e911

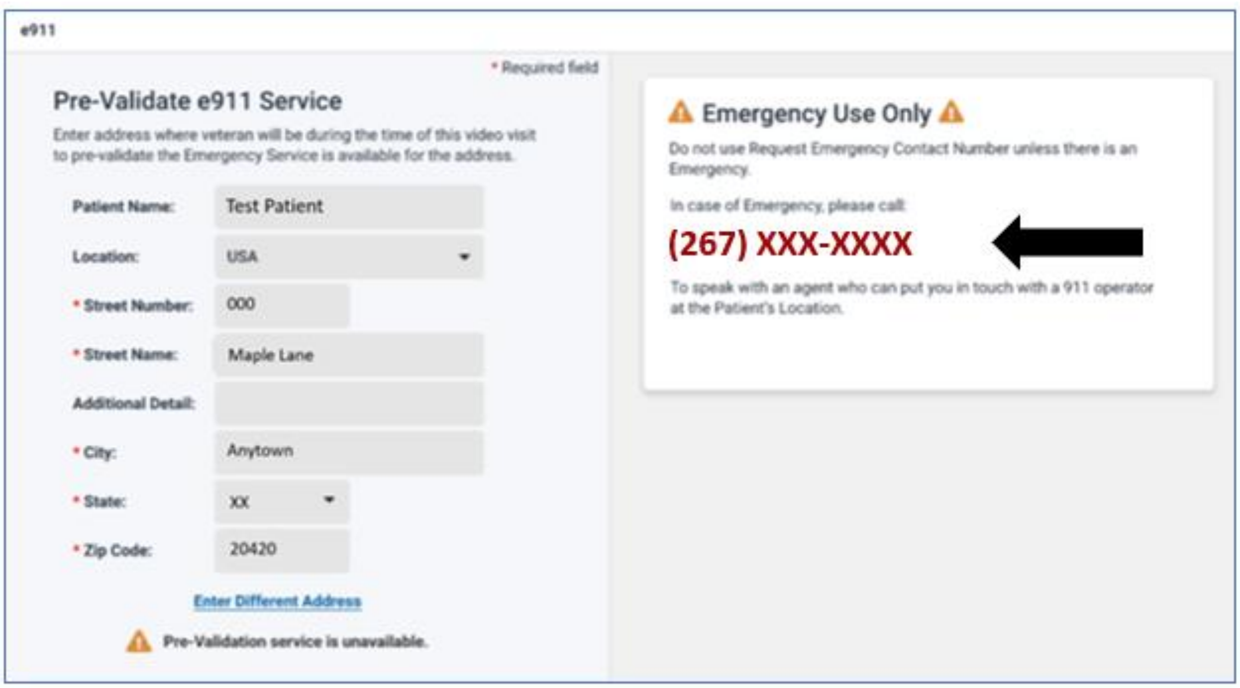
1. In * **Callback Phone Number:** Type your own or a clinic emergency must-answer 10-digit callback phone number (no extension). The callback number should be a phone number that a 911 operator can use to reach you, the VCM user.



2.

3. **Select "Request Emergency Contact Number"** to receive a temporary phone number that is valid for 10 minutes to call 911 at the participant's location.

4. Using a landline telephone or mobile phone, call the phone number displayed to connect directly to 911 at the patient's location.
5. If address pre-validation is not available, when pre-validate is selected, a general emergency number displays. Call this number to reach 911 services that will contact 911 at the patient's location.



6.7.3 After Calling e911

After calling e911, submit the following information:

- Report use of the VCM e911 service by the Telehealth Emergency Handoff Procedures. Also, report use to your Facility Telehealth Coordinator.

- Provide feedback about the VCM e911 feature, or for administrative questions, contact the Office of Connected Care Technology Help Desk.

6.7.4 Technical Support

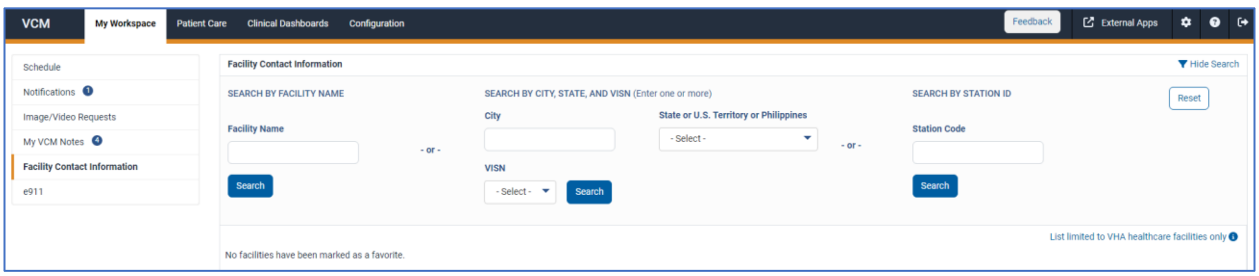
Call the Office of Connected Care Help Desk at 866-651-3180 or 703-234-4483, 24 hours a day, seven days a week, or email them at: VHA_OCCHD@va.gov

6.8 Facility Contact Information

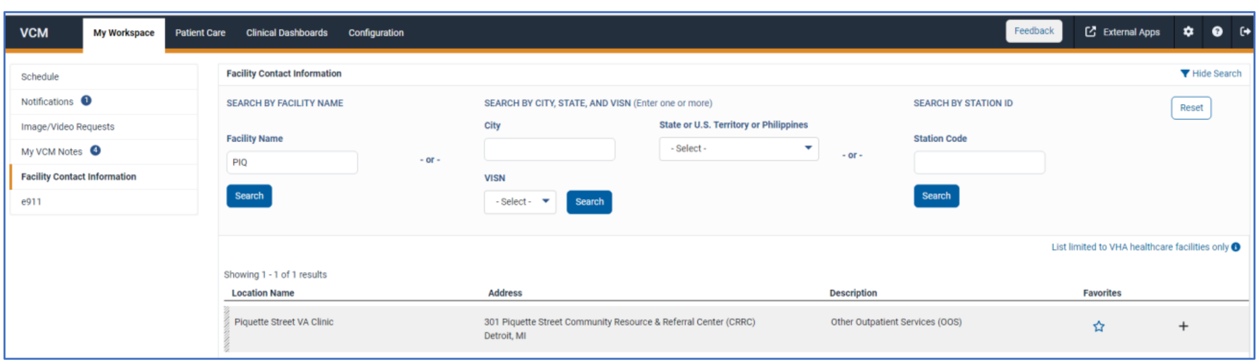
This menu option allows the ability to view Facility Contact Information for a patient location (Veterans Health Administration (VHA) Facility) at the time of their video visit. The user can search for a location, view the location contact information.

6.8.1 Search by Facility Name and Search by City, State, and VISN

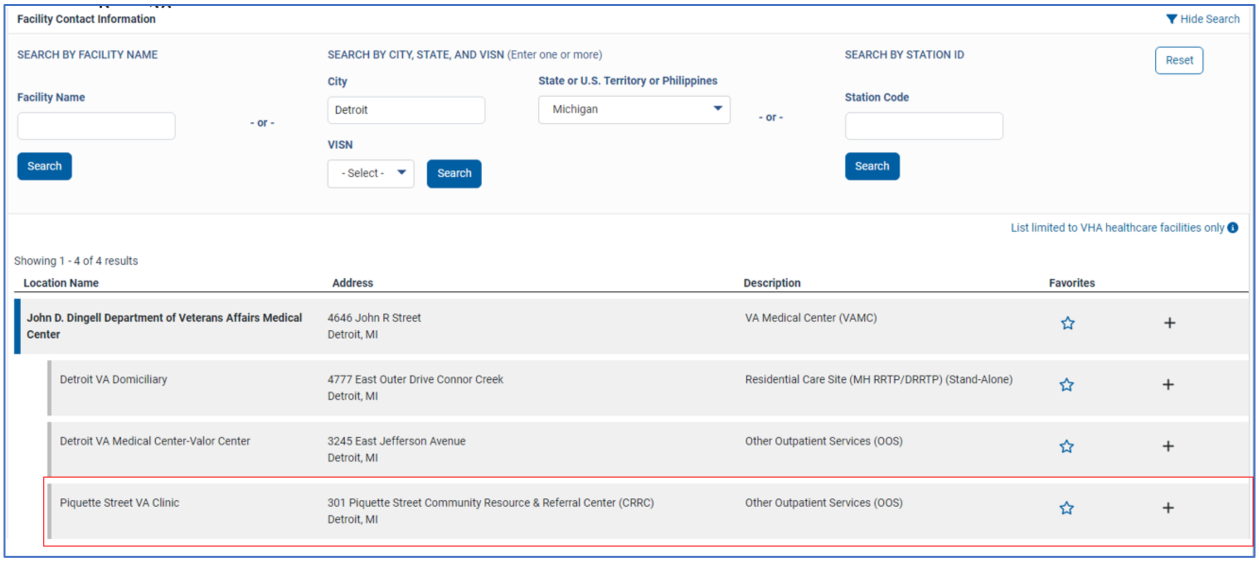
The user opens Facility Contact Information from the menu on the left and is prompted to enter search criteria for initial selection. The user can search by Facility Name, search/filter by any combination of City, State and VISN, or search by Station ID. The user must choose one of these methods to identify the desired Veterans Health Administration (VHA) Facility: “Search by Facility Name”, “Search by City, State or U.S. Territory or Philippines, and VISN”, or “Search by Station ID”. Only one search method can be used at a time.



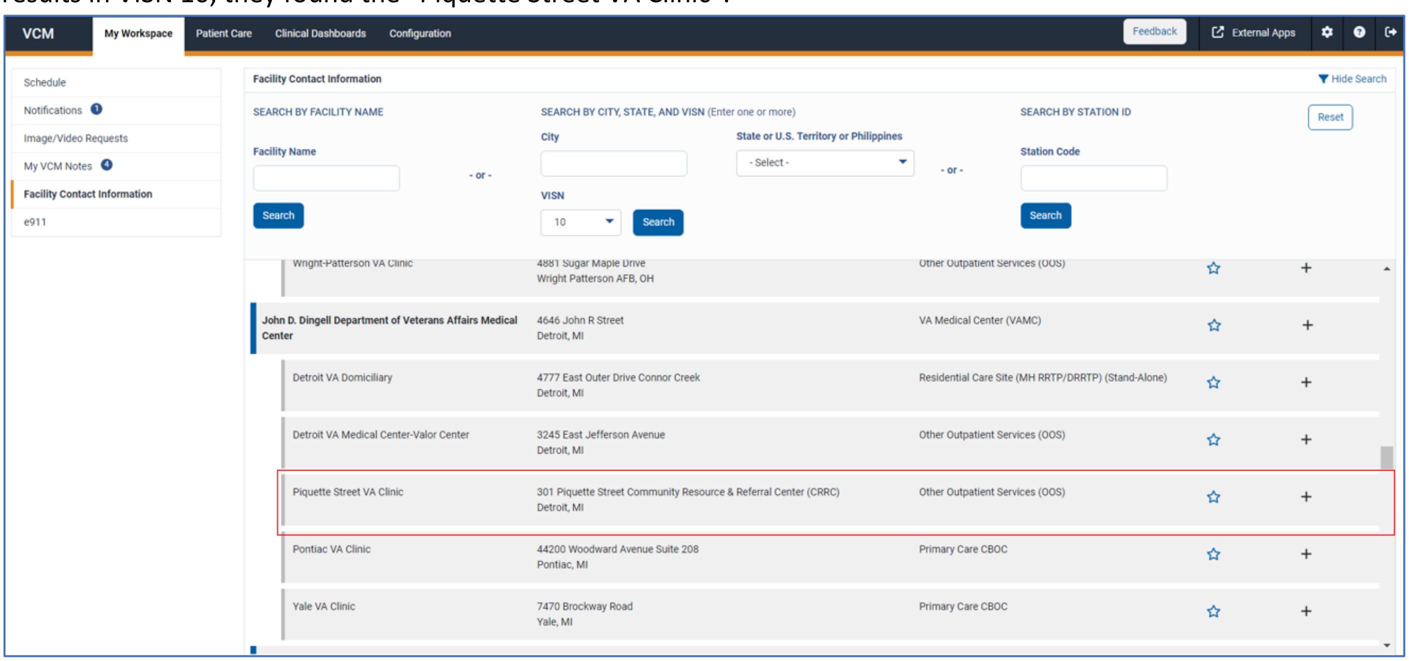
The following example demonstrates “Search by Facility Name”. For “Search by Facility Name” to produce the desired result, the text typed in the search field must match at least three letters of the Facility Name. For example, typing in “P-I-Q” and selecting “Search” will produce the “Piquette Street VA Clinic” shown below.



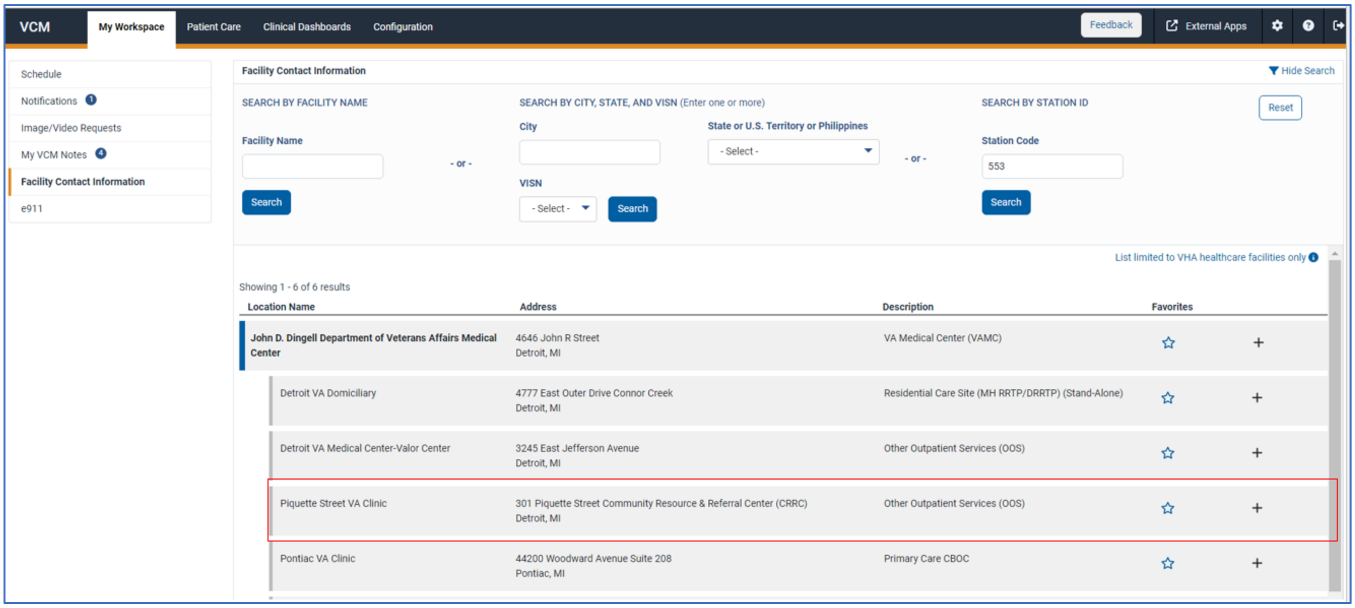
In the example below, the user identified the same VHA Facility as before, but used the “Search by City, State or U.S. Territory or Philippines, and VISN” option. This option can be helpful if the user isn’t sure of the exact name of the VHA facility, but knows the City, State and/or VISN in which it is located. Here, the user searched by City (Detroit) and filtered by State (Michigan) to produce the same facility that resulted above, “Piquette Street VA Clinic”, in the list of results.



As mentioned, the user who selects “Search by City, State or U.S. Territory or Philippines, and VISN” may use one or more of these fields to conduct their facility search. Using more fields narrows the results, as shown above with the combination of City and State. Using one field, such as VISN, produces more results. This might result in scrolling through facilities until the desired facility is identified, but broader results may also be helpful to the user who needs to see many options to narrow down and identify the desired facility. Below, see that the user filtered by VISN 10 alone. After scrolling through multiple results in VISN 10, they found the “Piquette Street VA Clinic”.

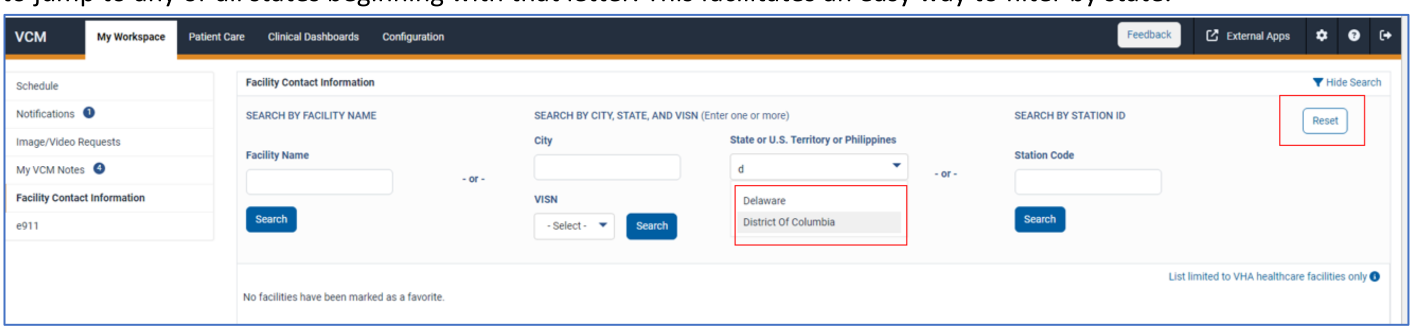


If the Station Code is known, “Search by Station ID” may be used to find a facility. In the example below, the Station Code entered was associated with all facilities listed under the John D. Dingell VAMC. The user can scroll to find the desired Piquette Street VA Clinic. However, if the user knew the specific Station Code for the Piquette Street Clinic, 553QA, the specific code may have been entered to produce a single result. Note: the entire Station Code must be known to conduct a search by Station Code.

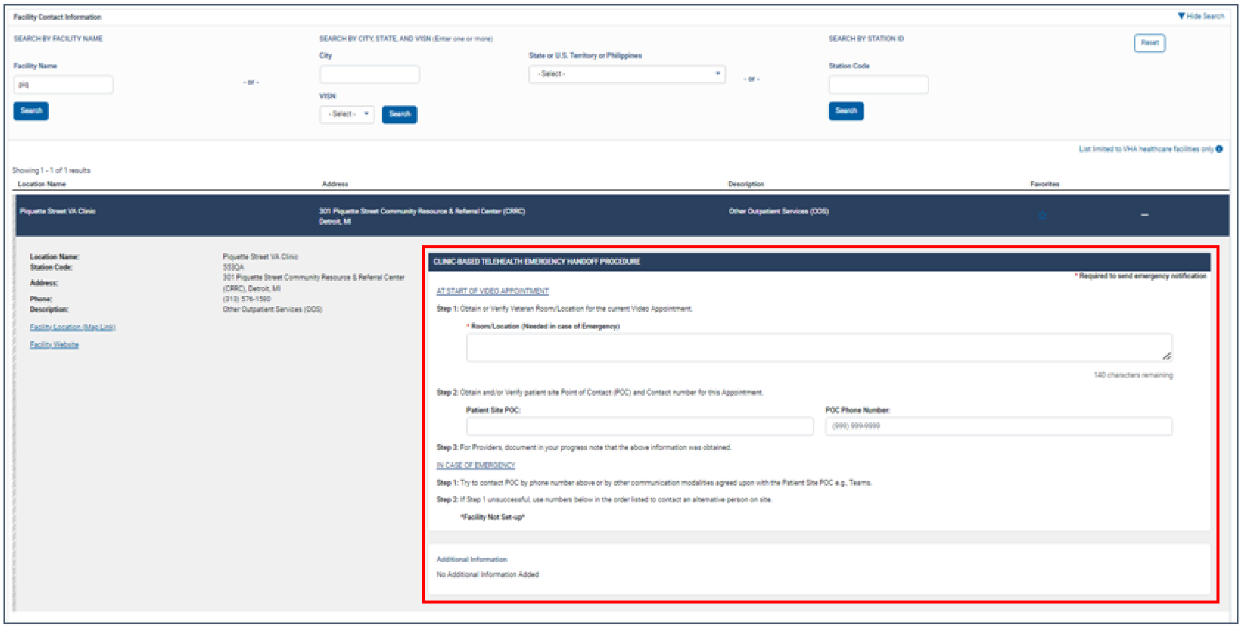


To execute ANY search, the user must select the "Search" button to produce results.

Some features of note for search functions in Facility Contact Information in My Workspace include the "Reset" button which allows the user to clear all search and filter fields at once. Additionally, within the "State or U.S. Territory or Philippines" filter field, the user may type the first letter of the desired state to jump to any or all states beginning with that letter. This facilitates an easy way to filter by state.



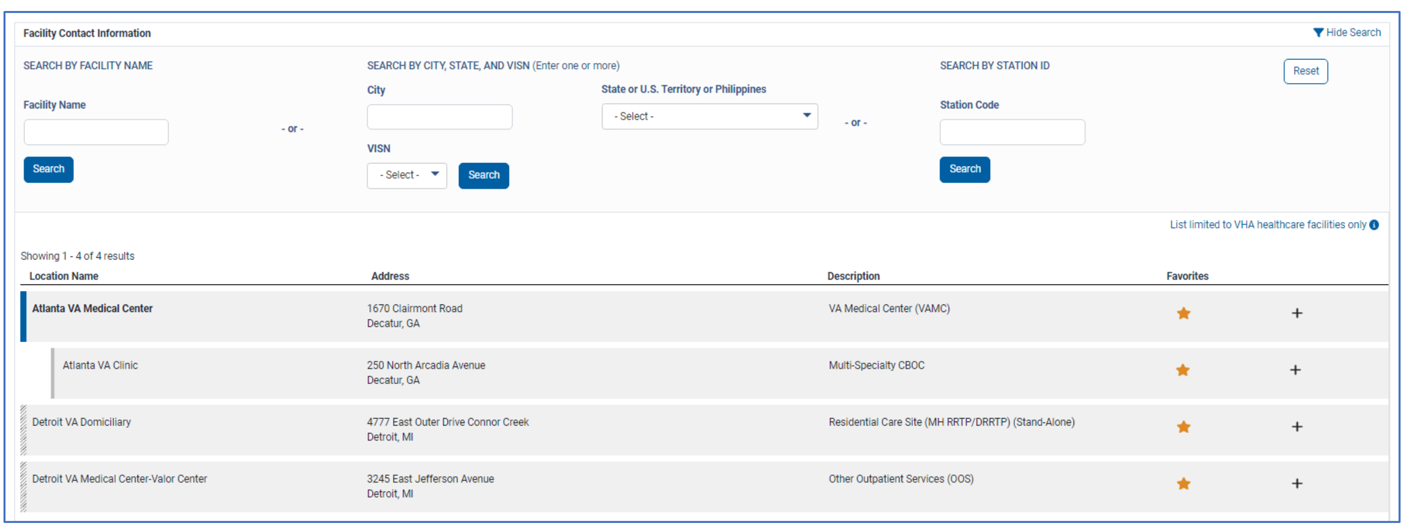
Once the user has identified the desired facility, they may click on the "+" next to the name of the desired facility (see examples from search results above) to expand the facility information and take necessary action, as well as view facility information, including the facility location and website via embedded hyperlinks. See the following steps for more information.



6.8.2 Favorites

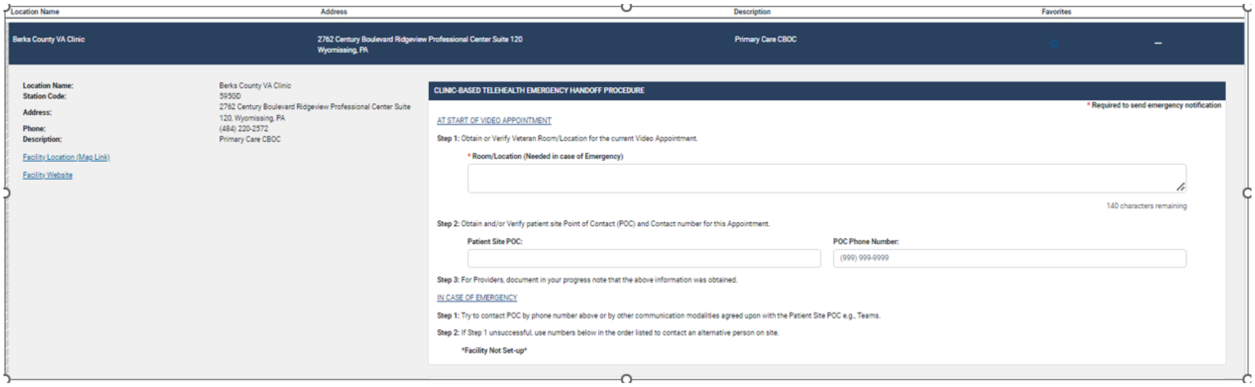
Users can identify one or multiple favorites or most often viewed locations by clicking on the star in the Favorites column for a location. The solid gold star indicates a Favorite. Locations selected as Favorites will display by default when a user selects Facility Contact Information from My Workspace.

To de-select a Favorite location, again clicking on a solid star. The outline star indicates that the location is not a Favorite.



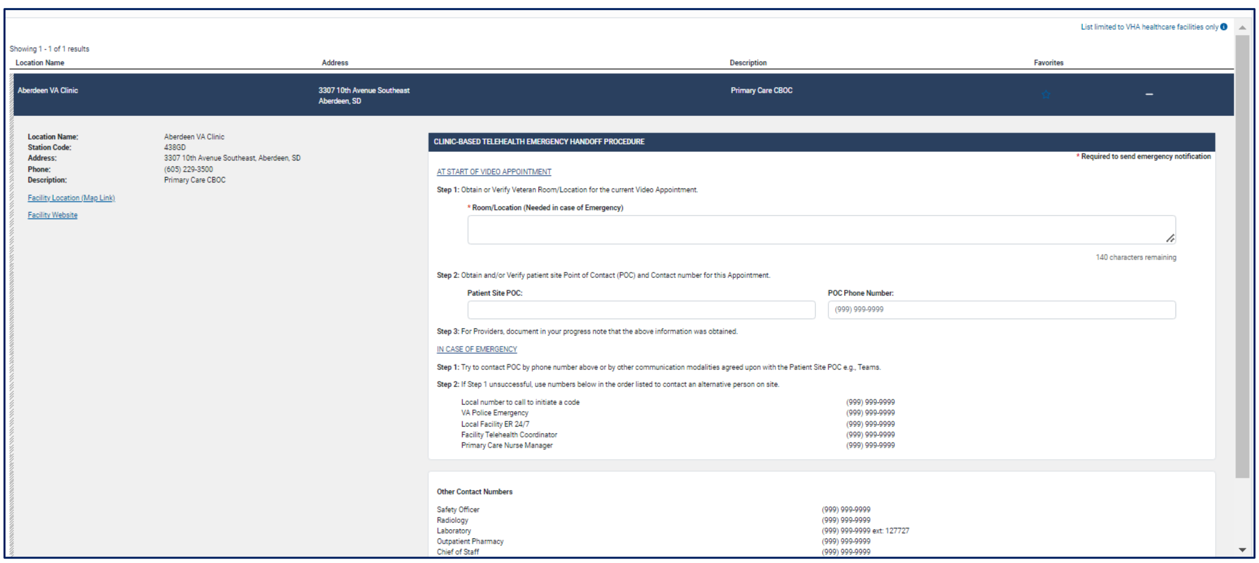
6.8.3 Facility Not Set Up

If the location that is the subject of the search is not set up Facility Contact Information, basic address information will display at left (as below) with a note included in the detail to indicate “Facility Not Set-up". Note that fields still display where the user can enter the room/location information, patient site POC name, and phone number.

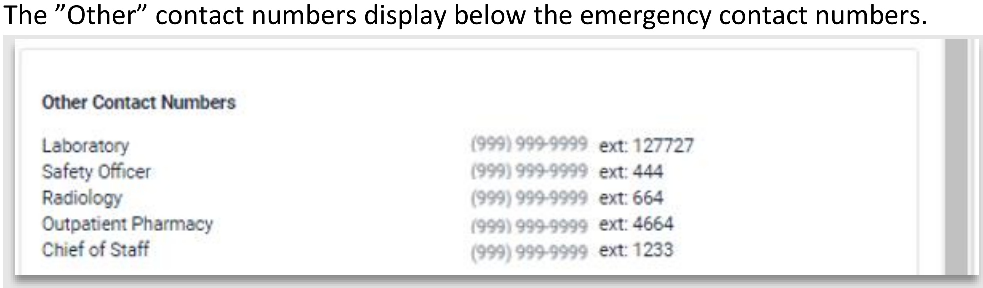


6.8.4 Facility Is Set Up

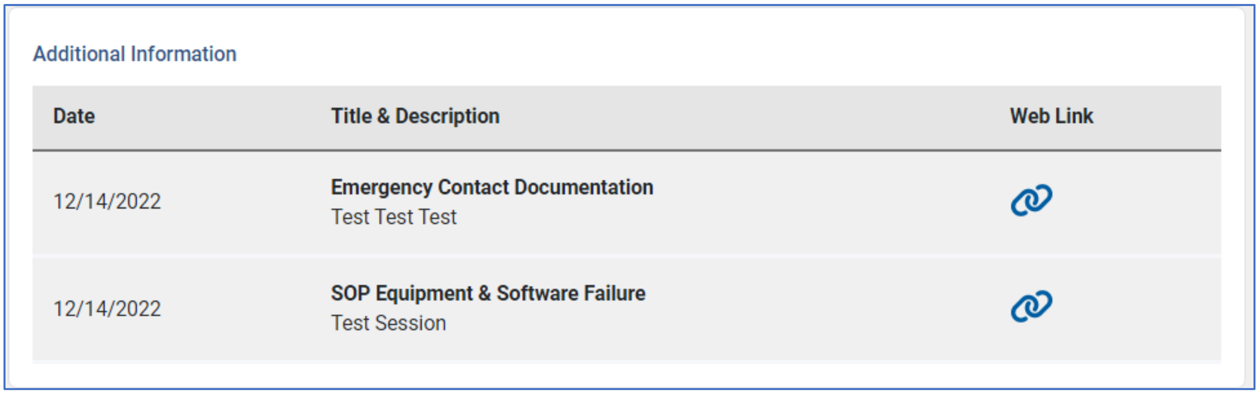
When a facility is set up with Facility Contact Information, such as the example below, the user first sees fields at the top to collect Veteran room/location information, patient site POC name, and phone number. Below that, emergency contact information displays, followed by other contact information.



The "Other" contact numbers display below the emergency contact numbers.



"Additional Information" is available, but optional. Additional information may include facility-related documents and web links.


Additional Information

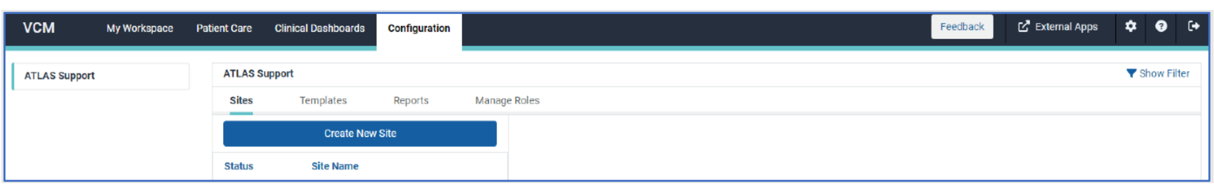
Date	Title & Description	Web Link
12/14/2022	**Emergency Contact Documentation** Test Test Test	
12/14/2022	**SOP Equipment & Software Failure** Test Session	

7. Configuration Tab

The Configuration area of the system will only be visible to VCM users who have access to an activity under Configuration (e.g.: ATLAS Support).

7.1 ATLAS Support

This menu option allows the ability to view a complete list of ATLAS sites as well as the creation and maintenance of sites. The user (ATLAS Support Admin) will see the option for Sites (selected by default), Templates, Reports, and Manage Roles. If the user is only a second level user, then they will only be able to view Sites and Templates under ATLAS Support (more info below).



7.1.1 Sites

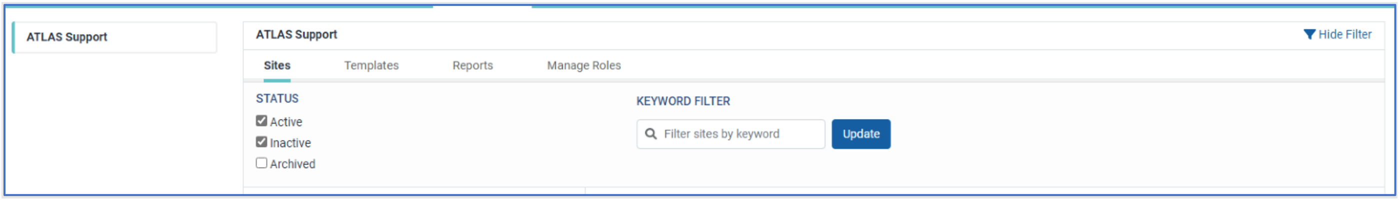
All ATLAS Sites will display within the Sites tab. The user can create and maintain meta-data for all ATLAS Sites. Slot availability can be determined and applied to each site as the user is creating or modifying site details.

7.1.1.1 ATLAS Site Filters

The filter will default to display all ATLAS Sites that include a status of ‘Active’, ‘Inactive’, and/or ‘Archived’

1. Narrow the results down further by unchecking or checking the checkboxes for a given status or entering text within the Keyword Filter field and selecting the **Update** button.
2. Select a site from the results listed below the search filters, to view that specific site’s detail view.

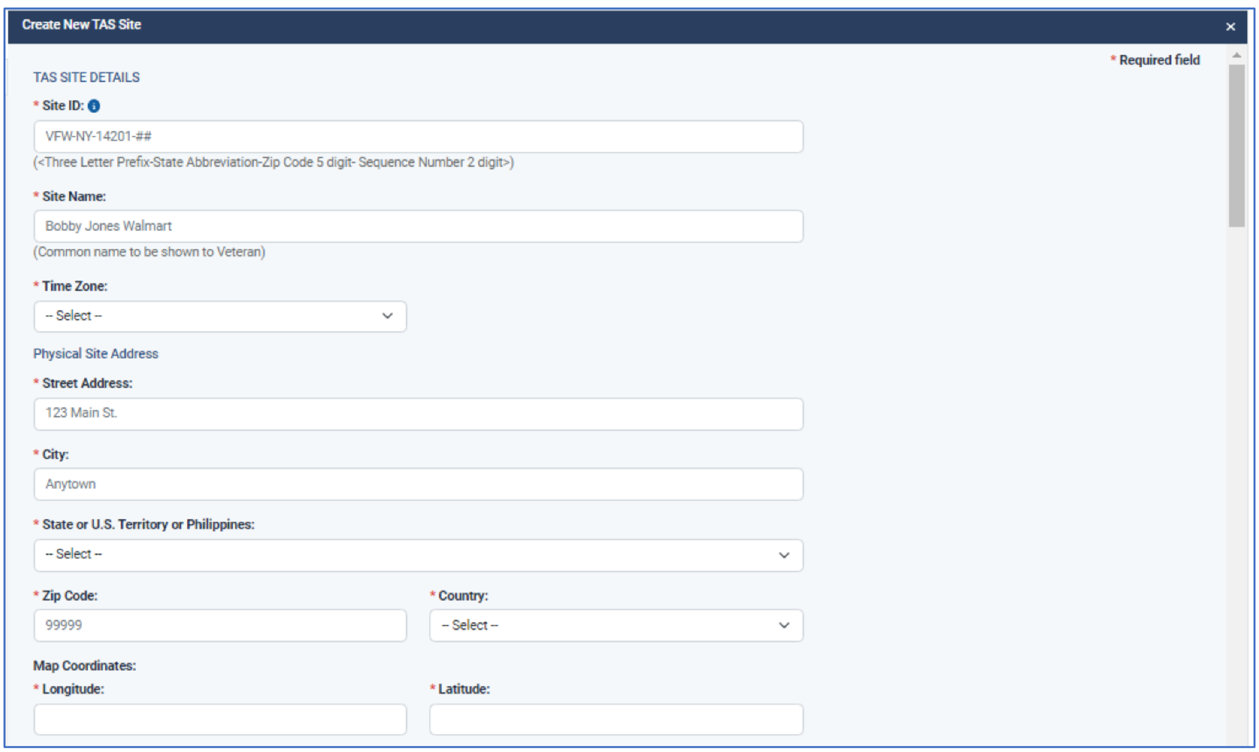
ATLAS Sites Filter:

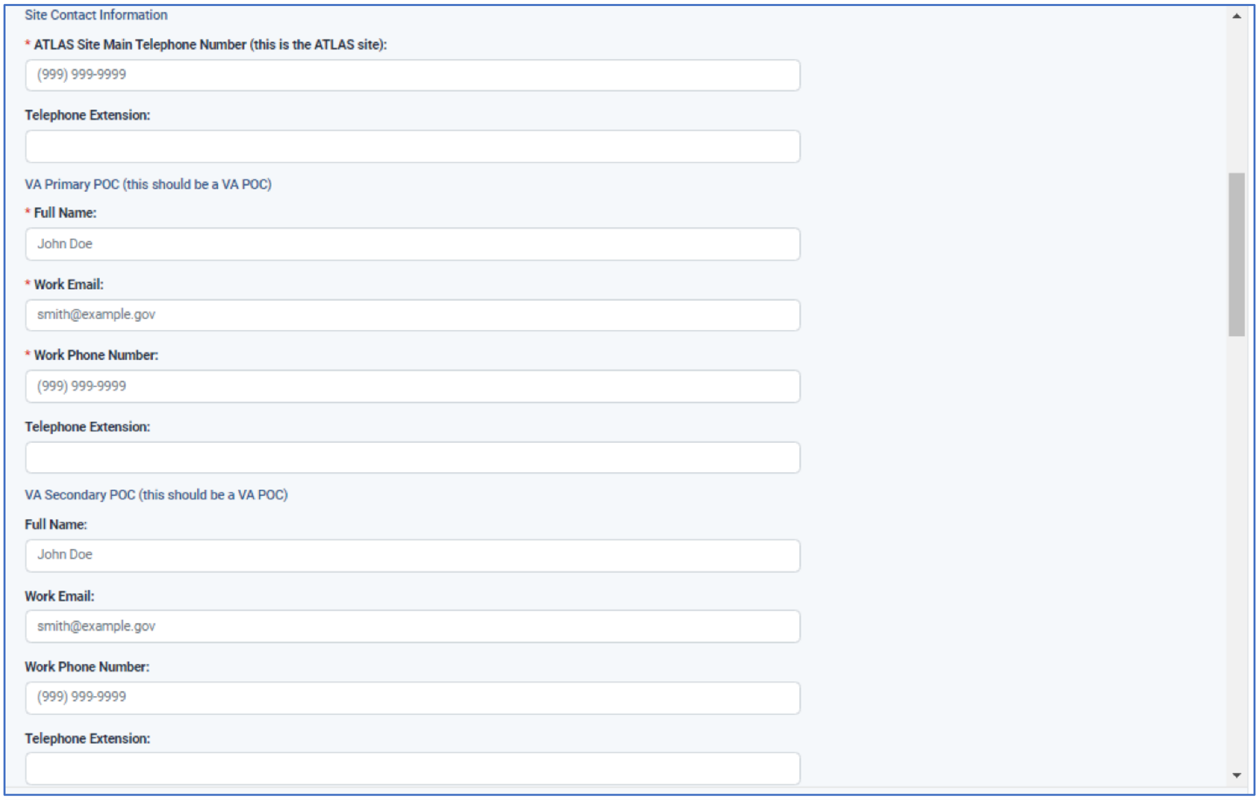


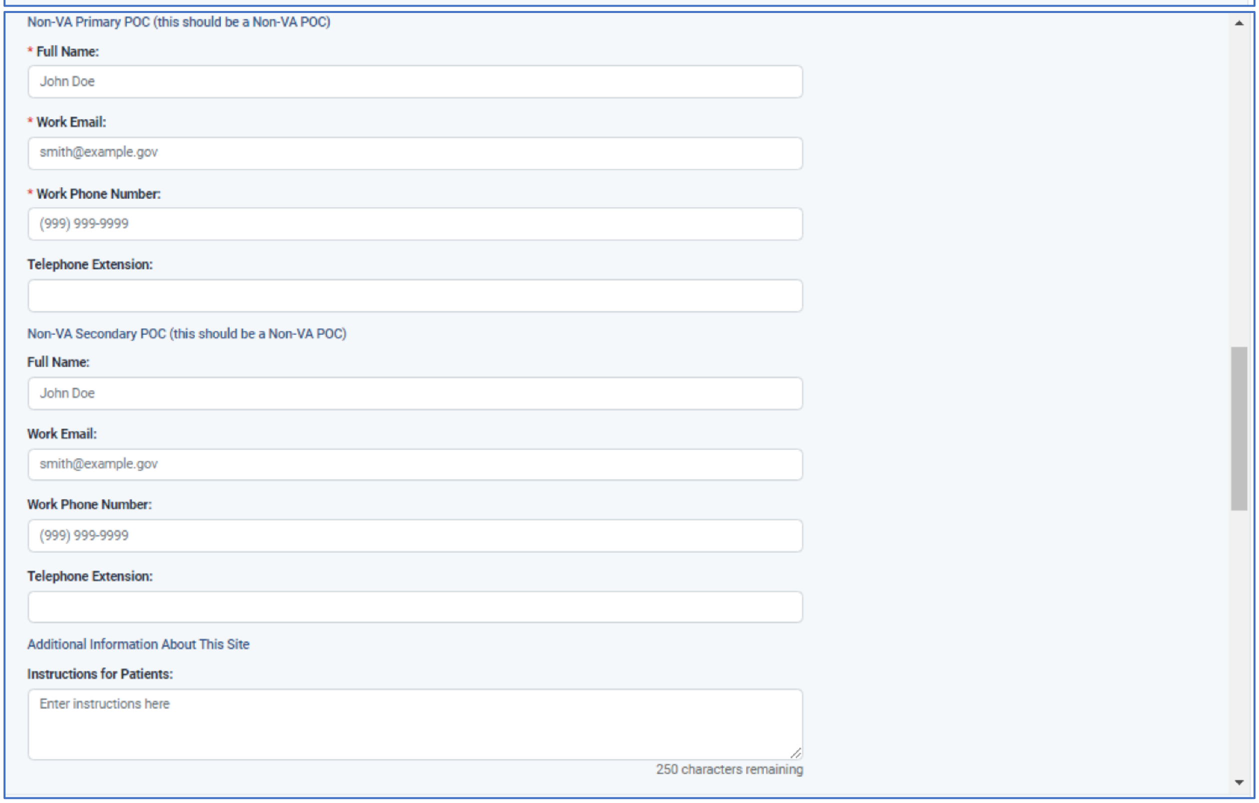
7.1.1.2 Create New ATLAS Site

1. Select the **Create New Site** button in order to create a new site and enter meta-data for that site.
2. All required fields must be satisfied in order to create the site.

   Note: Required fields - Site ID, Site Name, Time Zone, Map Coordinates (longitude/latitude), Physical Street Address (including State or U.S. Territory or Philippines), Site Contact Information, Site Status, Dates the Site will be Closed, Number of ATLAS Rooms at Site



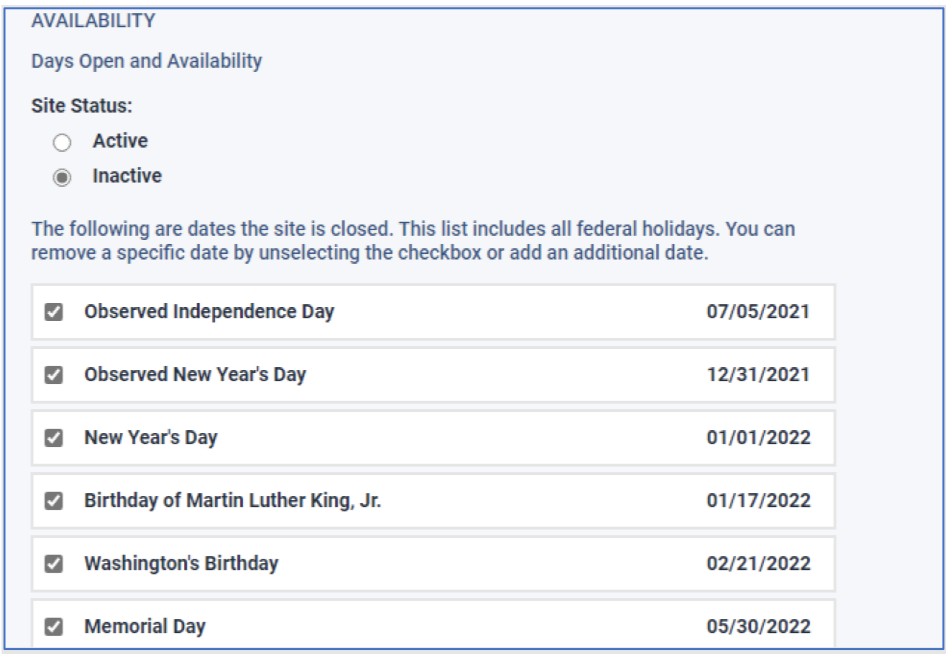


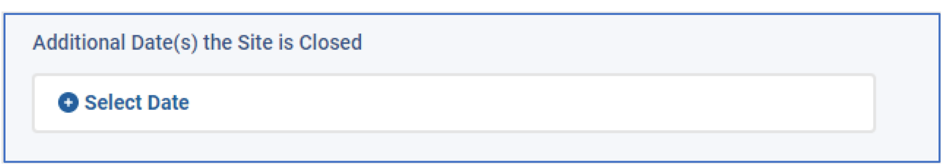


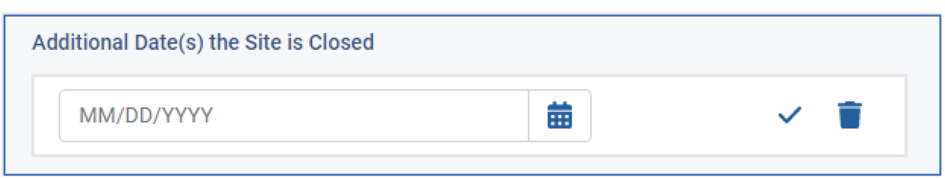
a. For the section labeled: **AVAILABILITY – Days Open and Availability - The following dates that the site will be closed** by default it will display only the list of federal holidays with a checkbox next to each with the checkbox checked by default so user can uncheck/remove if necessary.

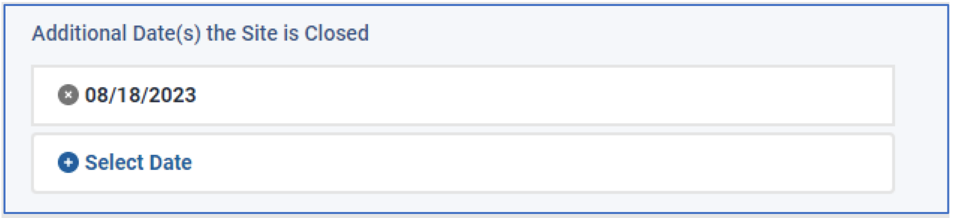
   i. Upon unchecking the checkbox next to the holiday listed, then that will indicate that the site will be open for that date removed.

b. There will be another section to add a custom date that the site will be closed and that is labeled: **Additional Date(s) the Site is Closed**.
   i. Upon selecting the '+' icon next to the 'Select Date' label a calendar picker and date field display for the user to be able to enter a custom date that the site will be closed for that year (e.g.: the first Tuesday of a particular month).
   ii. There will be a checkmark and trashcan icon to the right of the date field.
   iii. If a date is entered and the checkmark is selected, then the date is added with the following format MM/DD/YYYY; user can select the 'x' icon to remove the date added if desired.
   iv. If user selects the ' Select Date' and decides they didn't want to add a date, they can select the trashcan icon to remove the date entirely.
   v. Note: On Edit View – this section will display as **Exclusion Dates (Federal Holidays Included)** and will include a list of dates that the site will be closed.

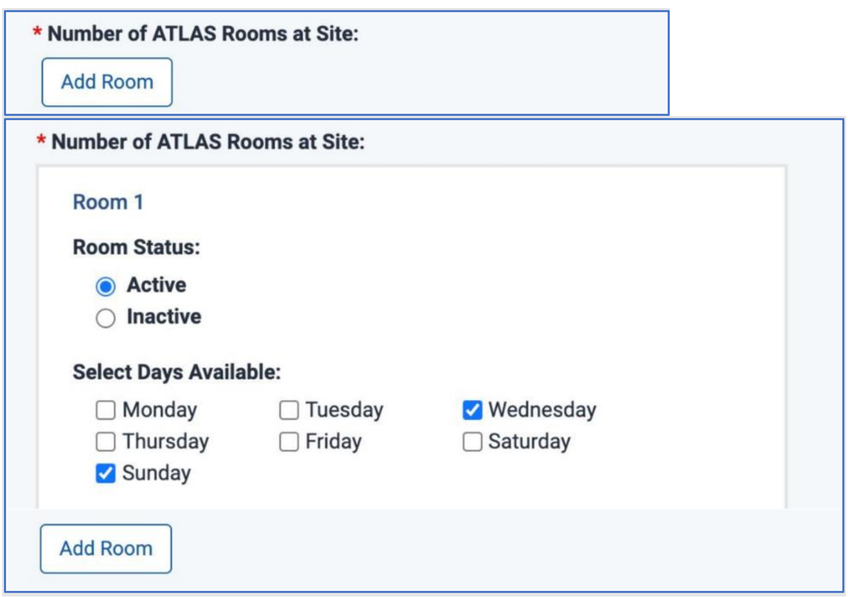




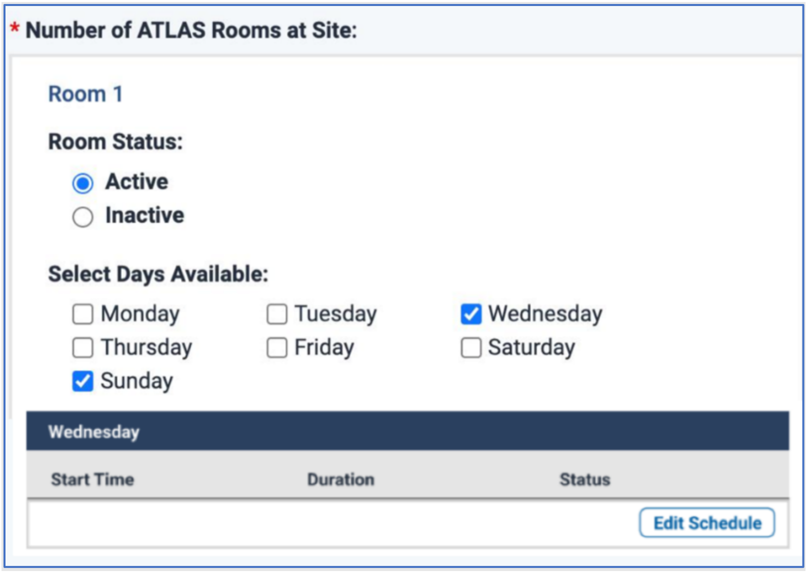




Edit View – Exclusion Dates



c. Number of ATLAS Rooms at Site will include an **Add Room** button:
   i. Selecting the **Add Room** button will display a card that includes checkboxes for each day of the week (unchecked by default).
   ii. If the status of the room is inactive, then the days of the week checkboxes cannot be checked (disabled).
   iii. If the status of the room is active, then the days of the week checkboxes can be checked (enabled) and upon selection a table displays for each day of the week checkbox that was checked.



iv. Each table will include columns for Start Time, Duration, and Status (all null by default).

v. Selecting the **Edit Schedule** button for a given day of the week table will display a modal to provide the slot availability.

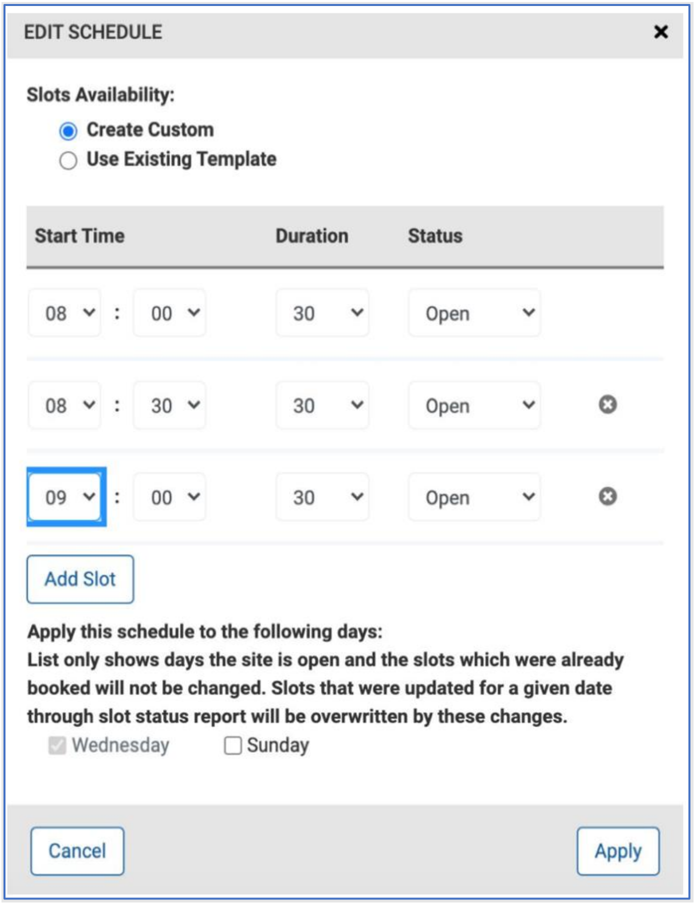
vi. Default setting for slot availability will be to **Create Custom**, but the user can select the **Use Existing Template** option in order to add a table that includes pre-populated slots (referenced further down). Each table will include one row by default with the following columns:

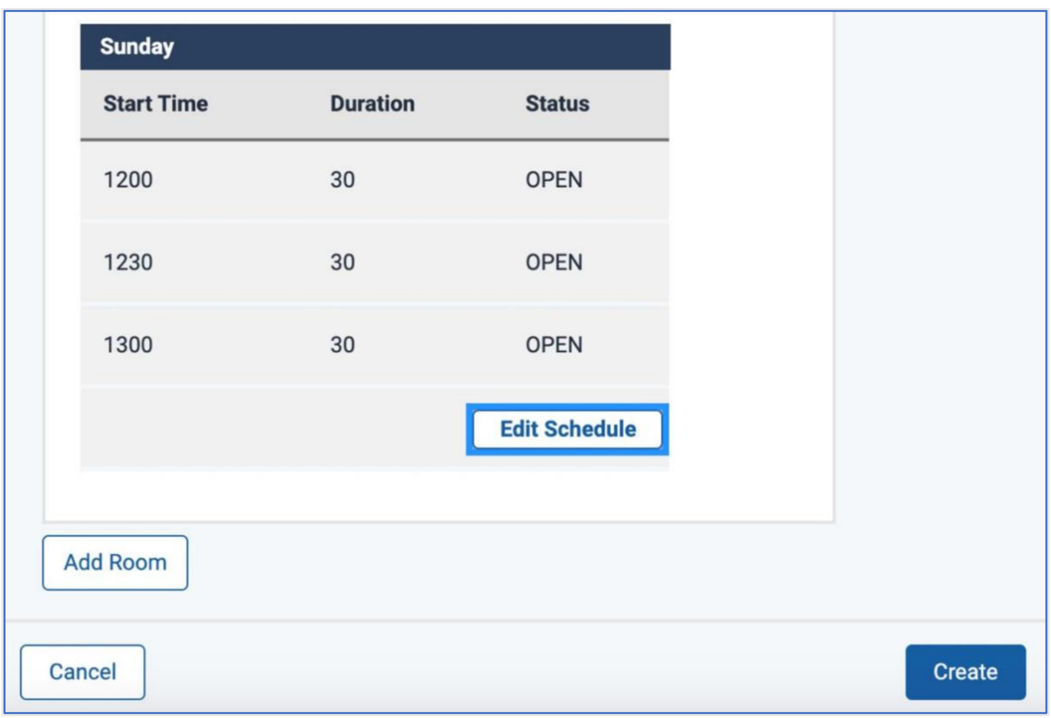
- Start Time for the slot will default to 08 00 and selections for hour/minute can be adjusted that would take up the 24 hour clock.
- Duration will default to 30 (minutes) and selections can be modified to either 15, 20, 30, or 60.
- Status will default to **Open**. User can select **Blocked** from the dropdown.

vii. Selecting the **Add Slot** button will add more slot rows to the table. (Note: Slots cannot overlap, must be in sequential order, and cannot exceed 24 hours).

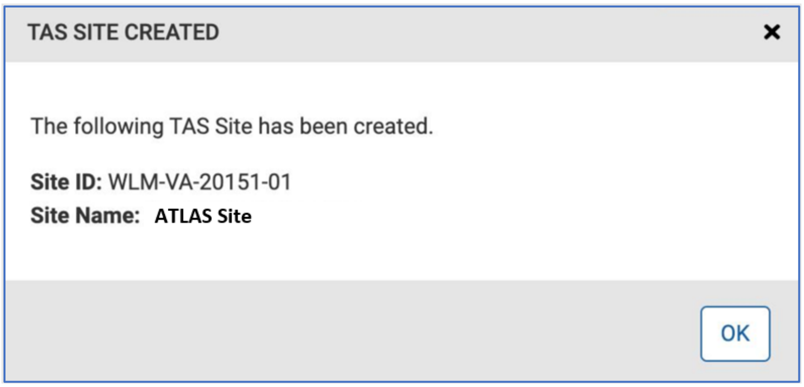
- Slot rows can be removed by selecting the **x** icon to the right of each row (with exception to the first slot row).

viii. The user can apply the created schedule for other days of the week in which the site is open by selecting the checkboxes below (if applicable), but slots that were already booked will not be changed. In addition, any changes made to the schedule will override changes made to the slot status report for that site on a given date (reference in slot status report section).


EDIT SCHEDULE
Slots Availability:
Create Custom
Use Existing Template
Start Time
Duration
Status
08 : 00
30
Open
08 : 30
30
Open
09 : 00
30
Open
Add Slot
Apply this schedule to the following days:
List only shows days the site is open and the slots which were already booked will not be changed. Slots that were updated for a given date through slot status report will be overwritten by these changes.
Wednesday
Sunday
Cancel
Apply


Sunday
Start Time
Duration
Status
1200
30
OPEN
1230
30
OPEN
1300
30
OPEN
Edit Schedule
Add Room
Cancel
Create

d. Completing ATLAS site creation (meta-data form):
   i. Select the **Create** button when all required fields are satisfied and the site will be created. User will be redirected back to the Sites list view page upon confirming site creation. (Note: If, for any reason, the user wants to cancel out of the form, they can select the **Cancel** button which will not save their changes and direct them back to the Sites list view page).



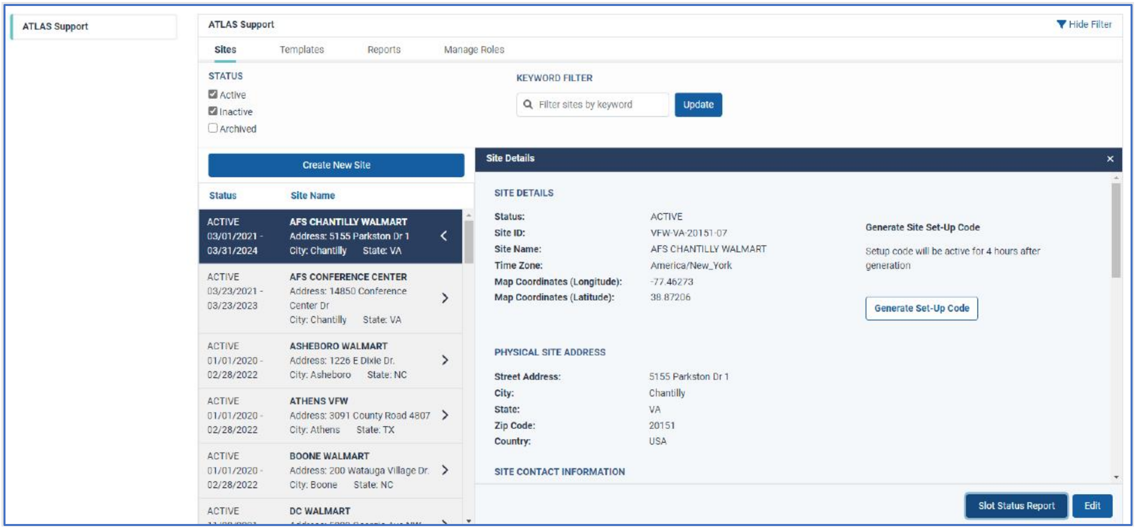
7.1.1.3 ATLAS Sites List View

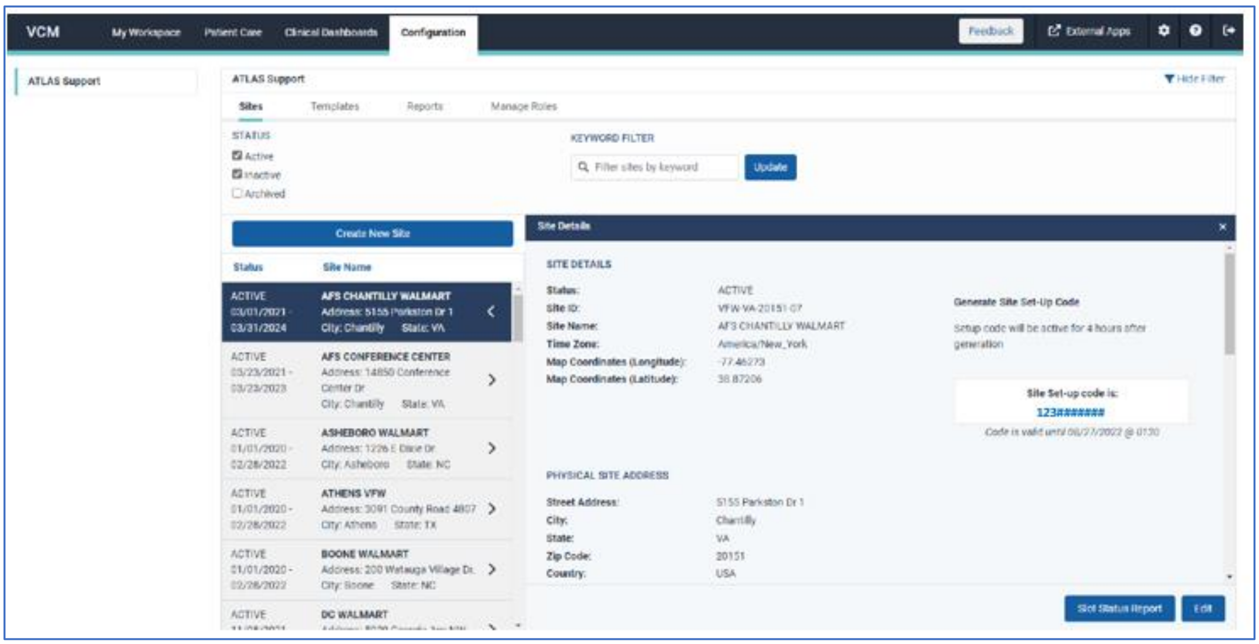
The list view for ATLAS sites on the left-hand panel will display the status and date range from when that site will be active until (Note: Inactive sites will not include a date range). List view will also display the name and the physical address for a given site.

7.1.1.4 ATLAS Site Details View

The details view for an ATLAS site will be in view once the site on the list view panel is selected. It will display read-only data for that given site provided by the user upon creation.

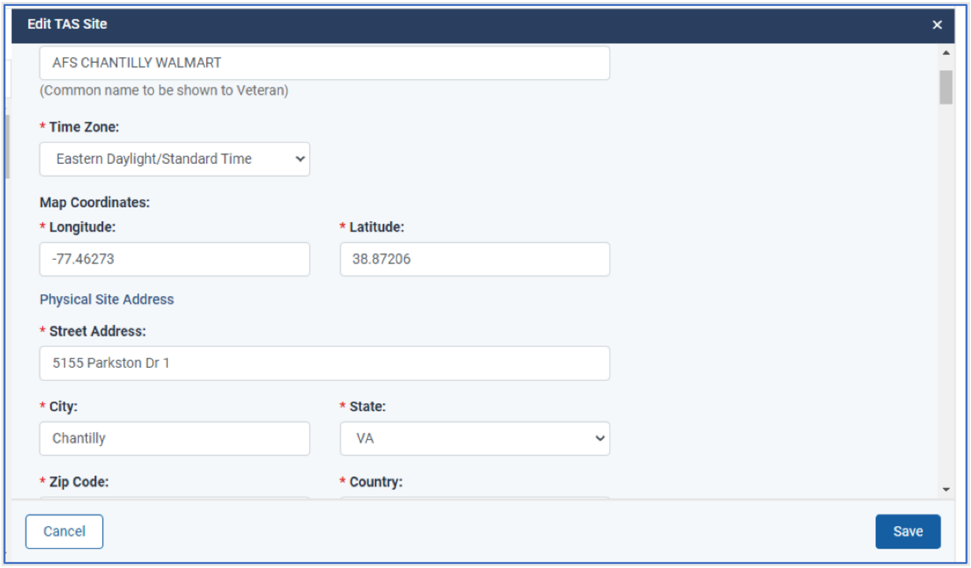
a. For Active ATLAS sites only, when the detail view is expanded on the right, there will be a button labeled 'Generate Site Set-Up Code (Note: this button will be hidden for inactive sites)
b. There will be instructional text that displays below the label as: 'Set up code will be active for 4 hours after generation'
c. Upon selecting the button, the set-up code will be generated AND the window for that code use will be active for 4 hours; if after 4 hour timeframe, the button will be hidden.
d. The generate site set-up code will appear on the screen, and replace the Generate Site Set-up button for the duration of 4 hours
e. Along with the generated code, text will also be shown that states the date and time that the code will no longer be valid - '*Code is valid until MM/DD/YYYY @ HHMM*'
f. After the valid period of the site set up code ends, the Generate Site Set-up Code button will appear (the previous site setup code will no longer be visible)





7.1.1.5 Edit ATLAS Site

An ATLAS Site can also be modified as the user deems necessary by selecting the **Edit** button located in the lower right corner of the site detail view.



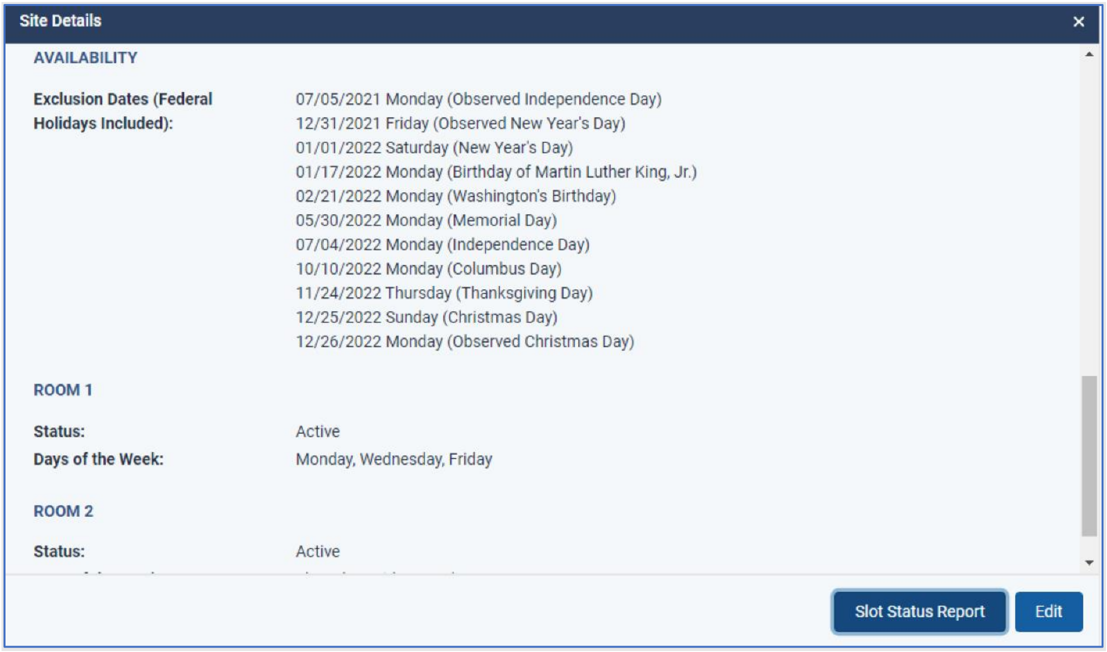
Once in edit mode, the user will be able to view the site fields they can modify and **Save** (Note: Site ID cannot be modified once the site has been created).

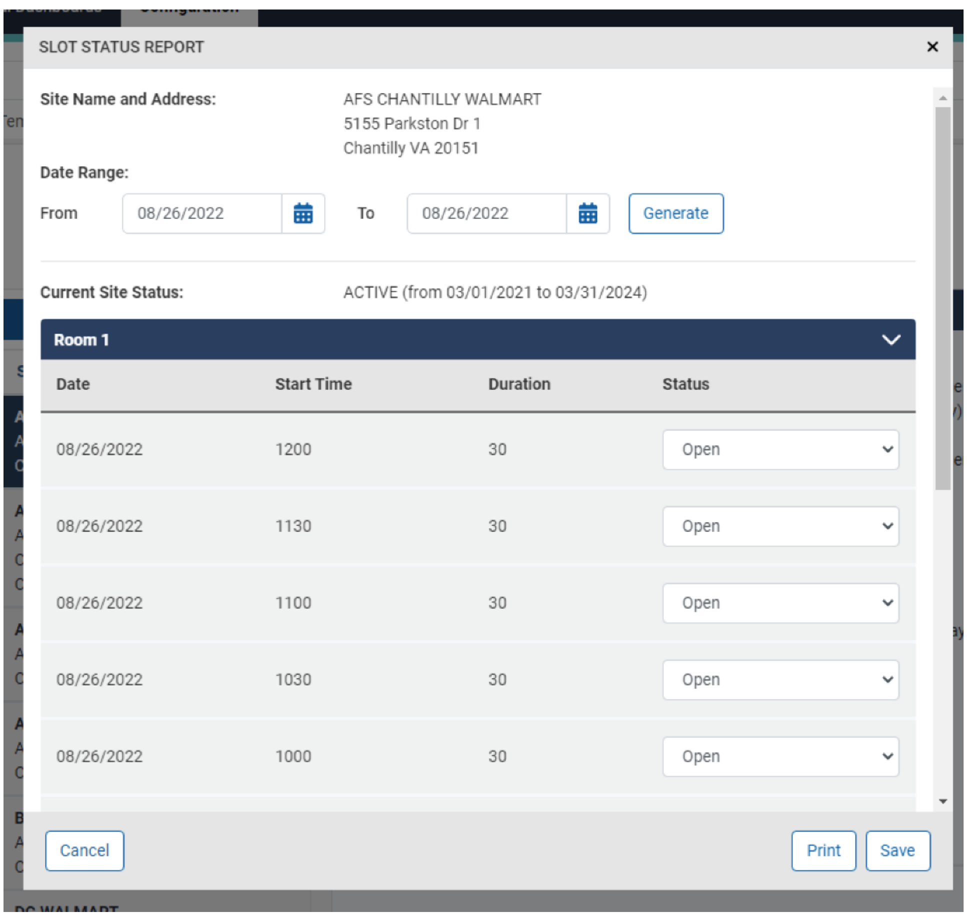
7.1.1.6 Slot Status Report

Within a site's details view, there will be a **Slot Status Report** button. Upon selection, the slot status report will be generated to view details for that site's slot availability on a given date range. The generated date range will default to today, however the user can change the dates to find details for a site's slots in the past as well as in the future.

a. For reports generated in the past, it will display read-only details for booked appointments and the user will not see info for slots that were not booked.

b. For reports generated today or in the future, it will display details for open, blocked, and/or booked slots. For this type of report, the user can modify whether they want to change the slot availability to 'Open' from 'Blocked' or vice versa. (Note: any changes made to a site's slot status report for a given date will not be reflected in the schedule for slot availability within the ATLAS meta data form. In addition, when slot status report is updated for slots that were not booked, and afterwards that site's schedule was updated, then those changes will override the updates made to the slot status report (with exception to booked slots).



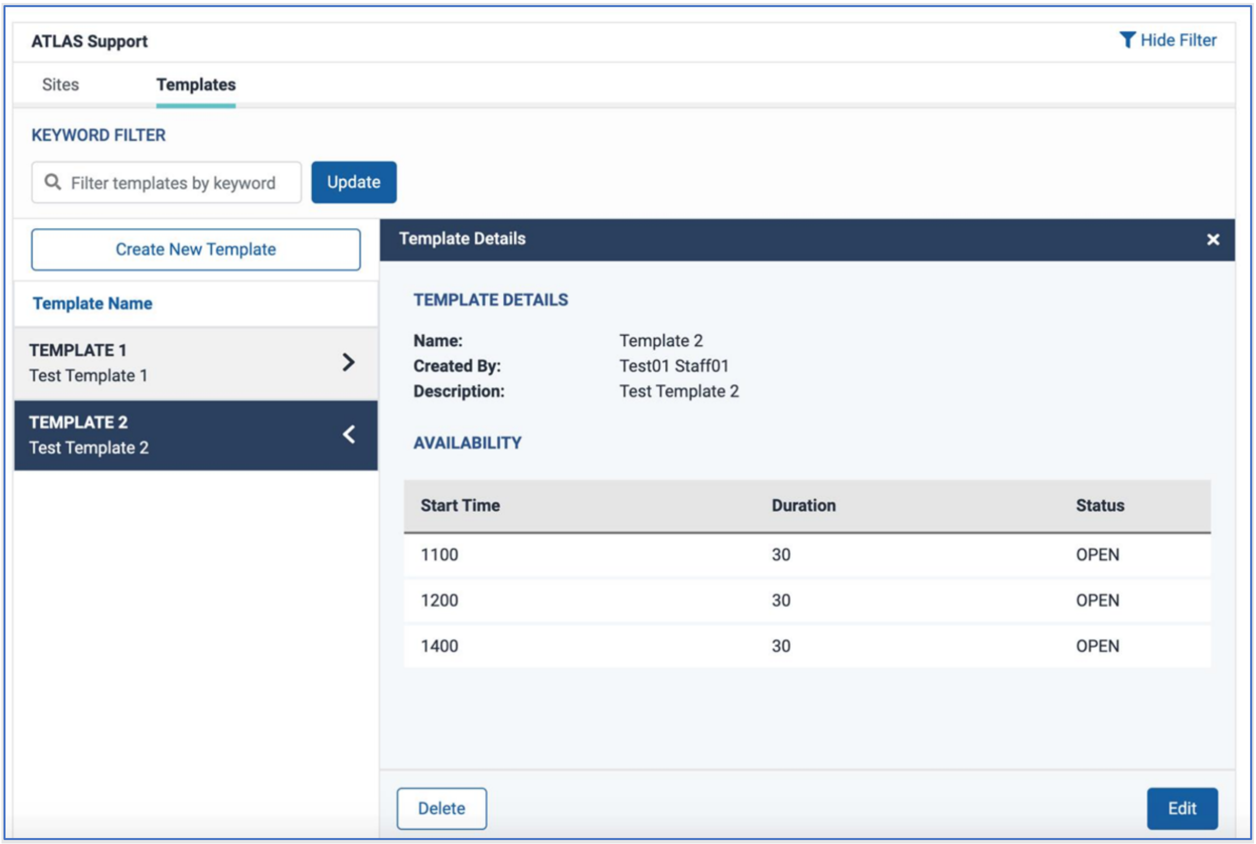


7.1.2 Templates

Templates provide convenience for ease of use across sites. Templates are schedules that can be created in advance in order to apply slot availability to sites for days of the week (for a given room). Any changes to templates on this view will be available on the **Sites** tab when applying site slot availability for a room on specific days of the week.

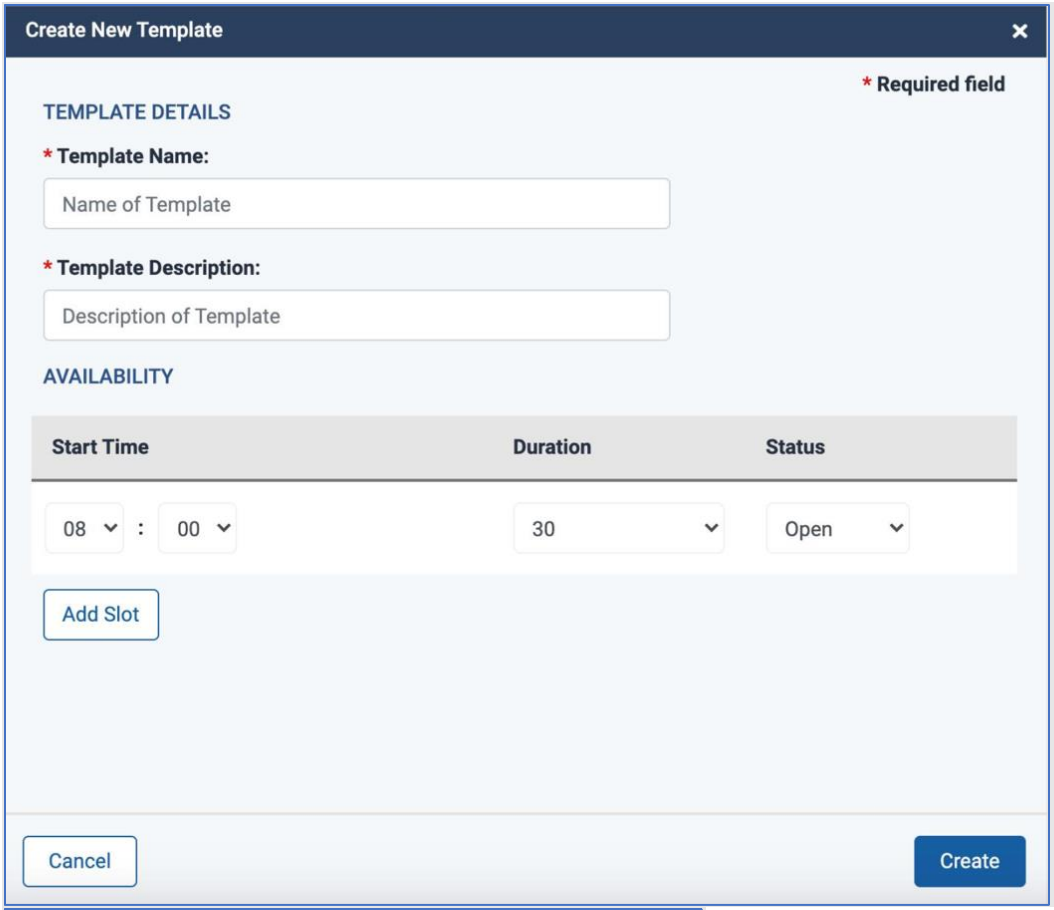
7.1.2.1 Template Filters

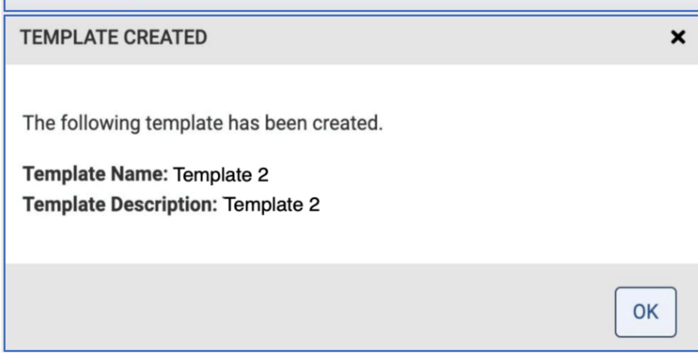
a. The filter will default to display all templates that were created by an ATLAS Support Admin
b. Narrow the results down further by entering text within the Keyword Filter field and selecting the **Update** button.
c. Select a template from the results listed below the search filters, to view that template's detail view.



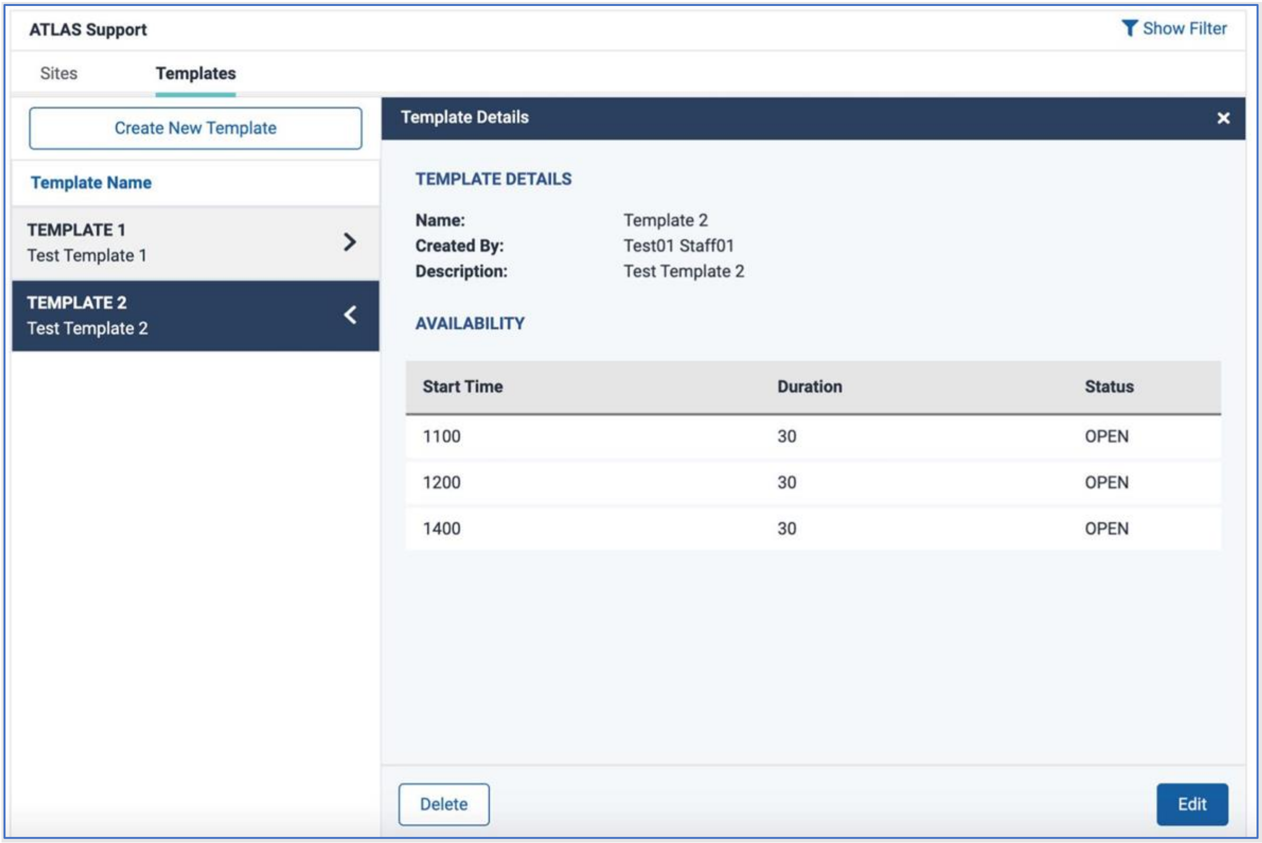
7.1.2.2 Create New Template

a. Select the **Create New Template** button in order to create a new template.
b. Required fields – Template Name, Template Description, and Availability.
c. By default one row will display within the Availability table for Start Time, Duration, and Status. User can add or remove slots.
    a. Start Time for the slot will default to 08 00 and selections for hour/minute can be adjusted that would take up the 24-hour clock.
    b. Duration will default to 30 (minutes) and selections can be modified to either 15, 20, 30, or 60.
    c. Status will default to **Open**. User can select **Blocked** from the dropdown.
d. Select the **Create** button when all required fields are satisfied and the template will be created.





e. The user will be redirected back to the Templates list view page upon confirming template creation.



7.1.2.3 Templates List View

The list view for templates on the left-hand panel will display the template name and description.

7.1.2.4 Template Details View

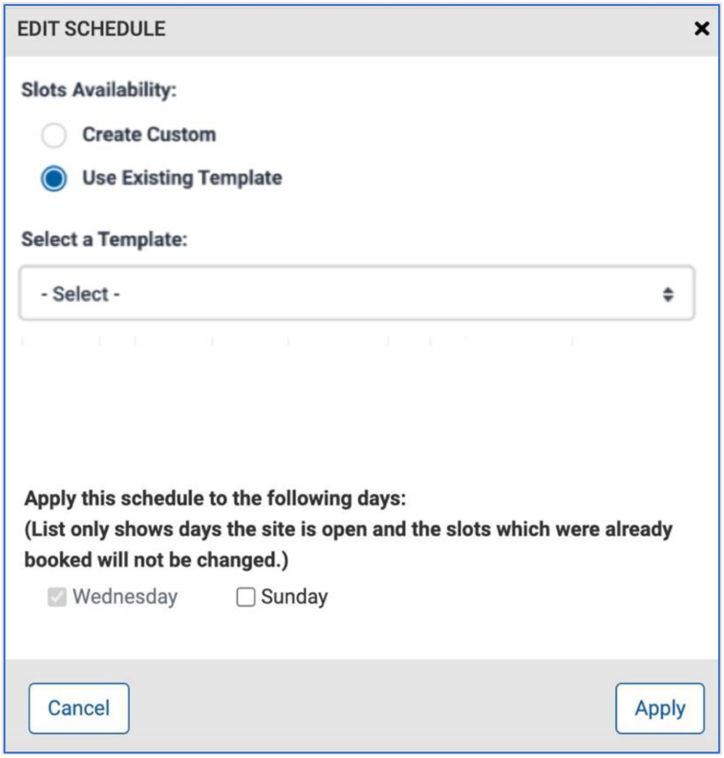
The details view for a given template will be in view once the template on the list view panel is selected. It will display read-only data for that given template provided by the user upon creation.

7.1.2.5 Edit or Delete Template

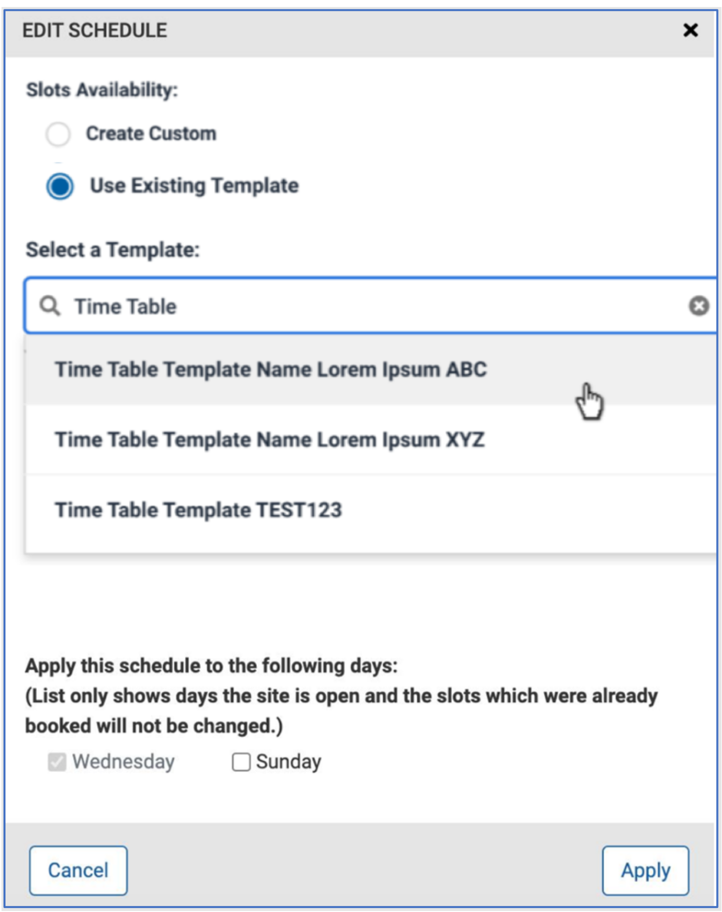
A template can also be modified or deleted as the user deems necessary by selecting either the **Edit** button or the **Delete** button within the template detail view. (Note: Deleted templates cannot be recovered)

7.1.2.6 Applying an Existing Template to an ATLAS Site's Slot Availability

a. Navigate back to the **Sites** tab
b. Select an existing or create a new site
c. Add an active room under the Number of ATLAS Rooms at Site section (if not already added)
d. Select a checkbox for any day of the week (if not already checked)
e. Select the **Edit Schedule** button for a given day of the week table. A modal displays to provide the slot availability.
f. In the previous steps, a custom schedule was applied to the site slot availability. However, now since the user has created a template (from the **Templates** tab) they can choose from existing templates that were created.

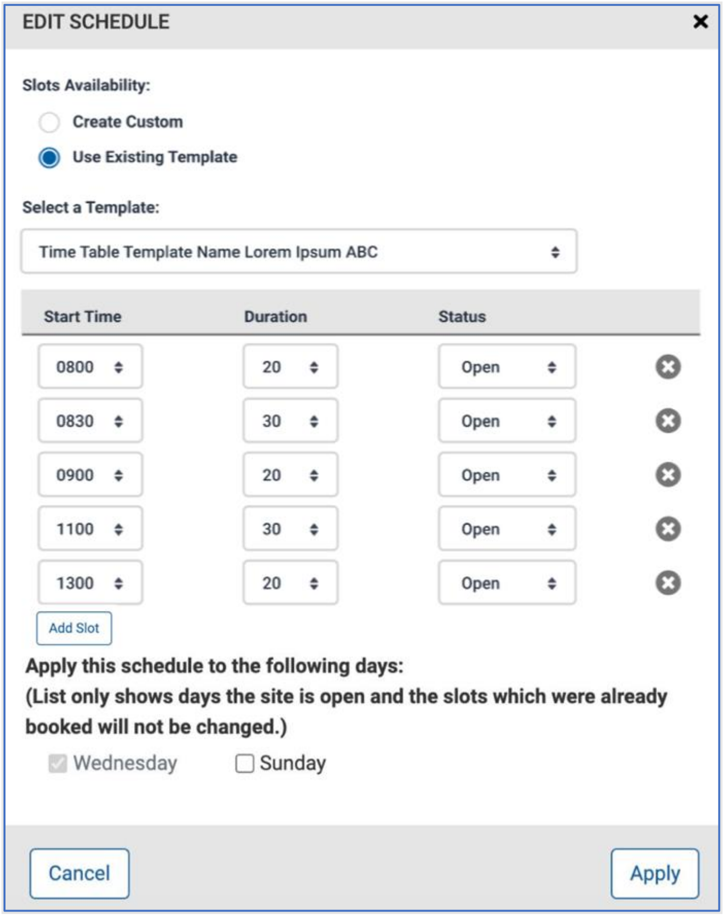


g. Under Slot Availability, select the **Use Existing Template** option
h. From the **Select a Template** dropdown field, a list of templates will display to select from



i. Select a template from the listing

j. A table displays with pre-populated slot information at the time the template was created. Note: Any changes to slot availability here does not change the original template. Template changes must be made in the **Templates** tab.



k. Each table will include the following columns:

  a. Start Time for the slot will pre-populate with what was given by the user at the time of template creation. Selections for hour/minute can be adjusted that would take up the 24-hour clock.

  b. Duration will pre-populate with what was given by the user at the time of template creation. Selections can be modified to either 15, 20, 30, or 60.

  c. Status will pre-populate with what was given by the user at the time of the template creation. User can change Status between **Open** and **Blocked** from the dropdown.

    i. Selecting the **Add Slot** button will add more slot rows to the table. (Note: Slots cannot overlap, must be in sequential order, and cannot exceed 24 hours).

      1. Slot rows can be removed by selecting the **x** icon to the right of each row (with exception to the first slot row).

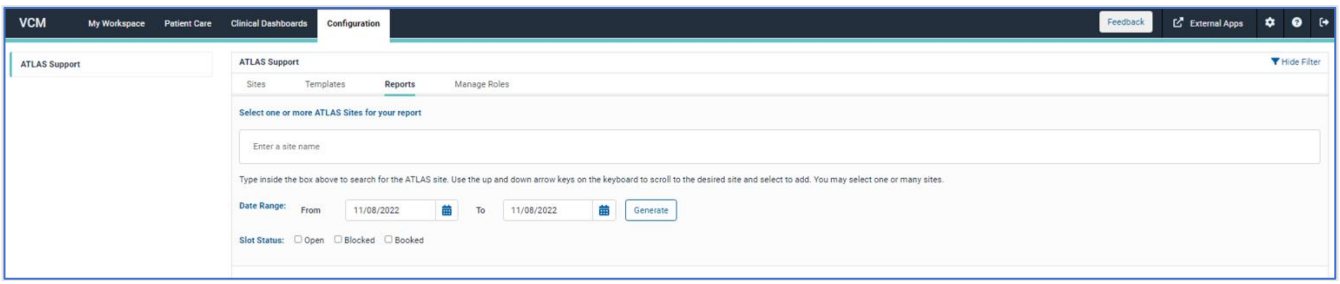
l. The user can apply the created schedule for other days of the week in which the site is open by selecting the checkboxes below (if applicable), but slots that were already booked will not be changed.

7.1.3 Reports

Within the Configuration Tab there will be a new tab labeled **Reports** that exists for users who have first level access to the ATLAS Support capability in VCM. Reports allows the ATLAS Support user to be able to generate a slot status report for one or multiple sites at a time for a given date range to view. This helps the scheduler know what time slots are 'Open,' 'Booked,' or 'Blocked' for active ATLAS sites.

7.1.3.1 Reports Filters

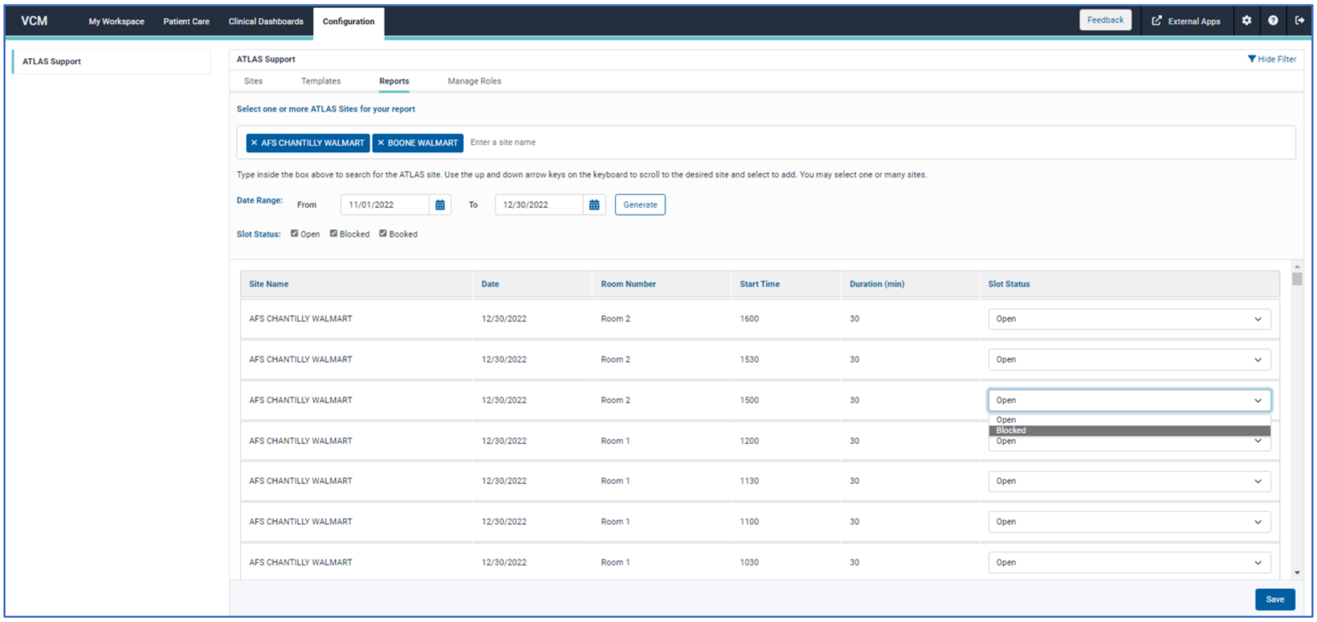
a. A filter area displays and is expanded by default at the top. There will be an area for the user to enter site name(s) in a text field, to search by a date range, and slot status (by Open, Blocked, or Booked) to generate a report that they can view or edit the slot availability for (for one or multiple sites at a time). The default date range will be the current date for both the From and To date fields.

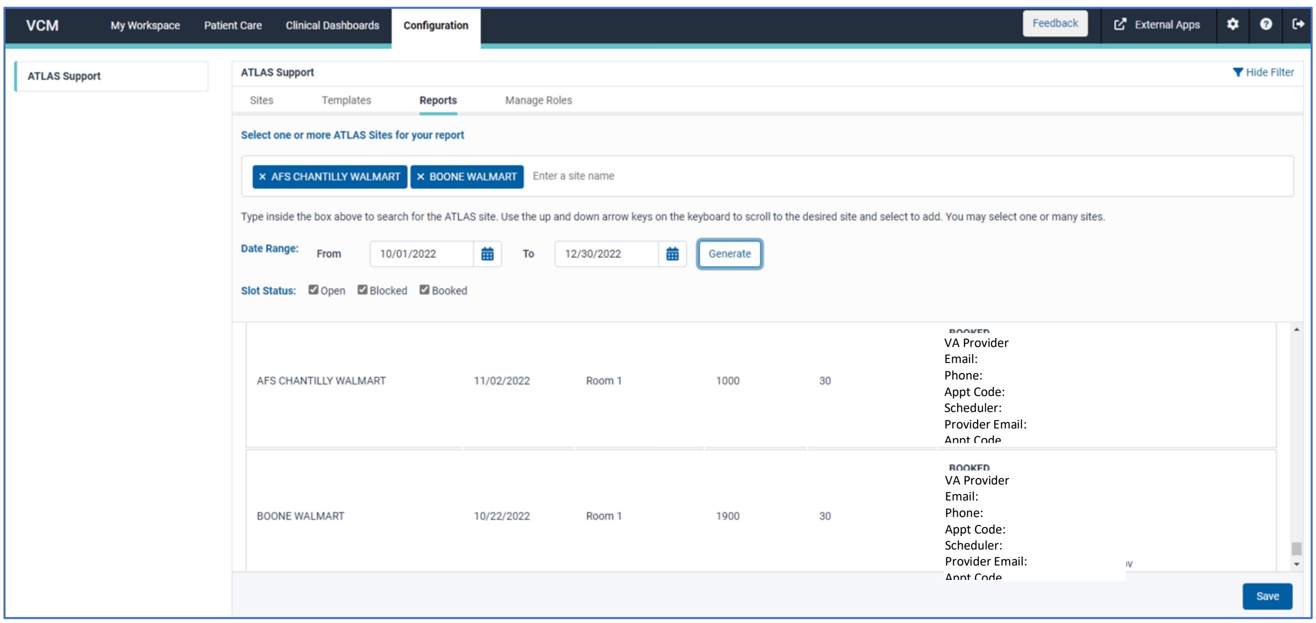


7.1.3.2 Reports Table

b. The generated report will display as a table and there will be columns to view from left to right: Site Name, Date, Room Number, Start Time, Duration (min), and Slot Status.

i. All text within the table view is read-only except for the Slot Status column in which this will include a dropdown to be able to update the slot status to either 'Open' or 'Blocked' and the report can be saved in order to reflect the slot availability (for a given date/time) properly to the scheduler when scheduling an ATLAS appointment. (Note: Booked slots will include read-only text about the appointment information)



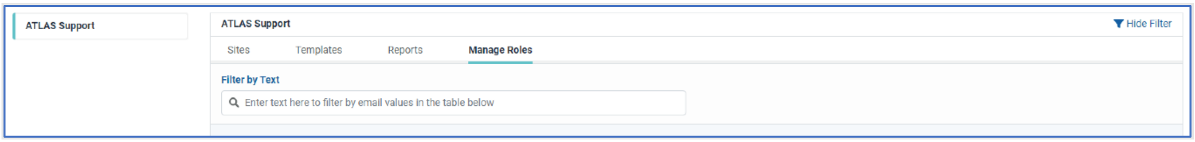


7.1.4. Manage Roles

Within the Configuration tab there will be a new tab labeled **Manage Roles** that exists for users who have full access to the ATLAS Support capability in VCM. Manage Roles allows the ATLAS Support user to be able to add individual(s) who they want to provide ATLAS Support capability to (whether it be a user who can have full access or a limited access). A full access user will be able to view all ATLAS Support tabs such as Sites, Templates, Reports, and Manage Roles. The full access user will have the ability to edit and modify any items within these specified tabs. A full access user can also add, edit, or remove users with full or limited access to ATLAS Support capabilities within VCM. A limited access user will only be able to view the Sites tab with limited access in which they can only access a read-only view for ATLAS Sites created and be able to edit slot status report for an individual site from blocked to open or vice versa. (Note: This is the 'Slot Status Report' button for a given ATLAS site under the Sites section within ATLAS Support).

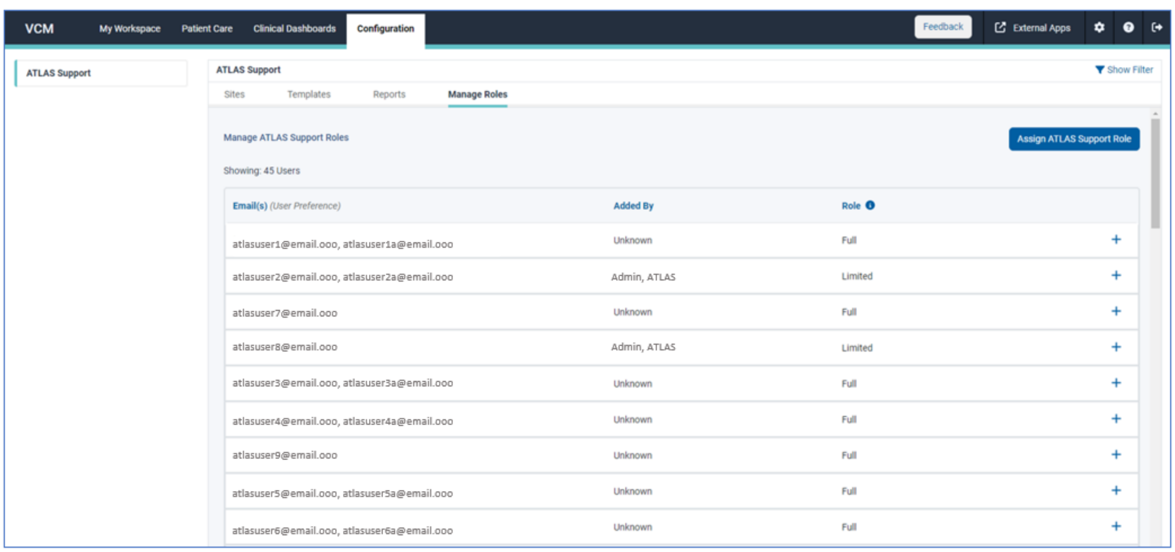
7.1.4.1 Manage Roles Filter View

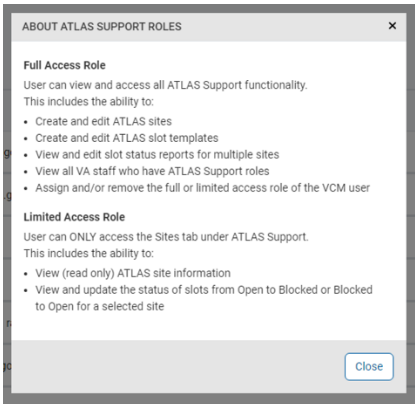
a. A filter area displays and is collapsed by default at the top. Upon expanding the filter by selecting the 'Show Filter' link, a **Filter by Text** field displays for the first level access user to be able to enter text in order to find an individual if necessary.



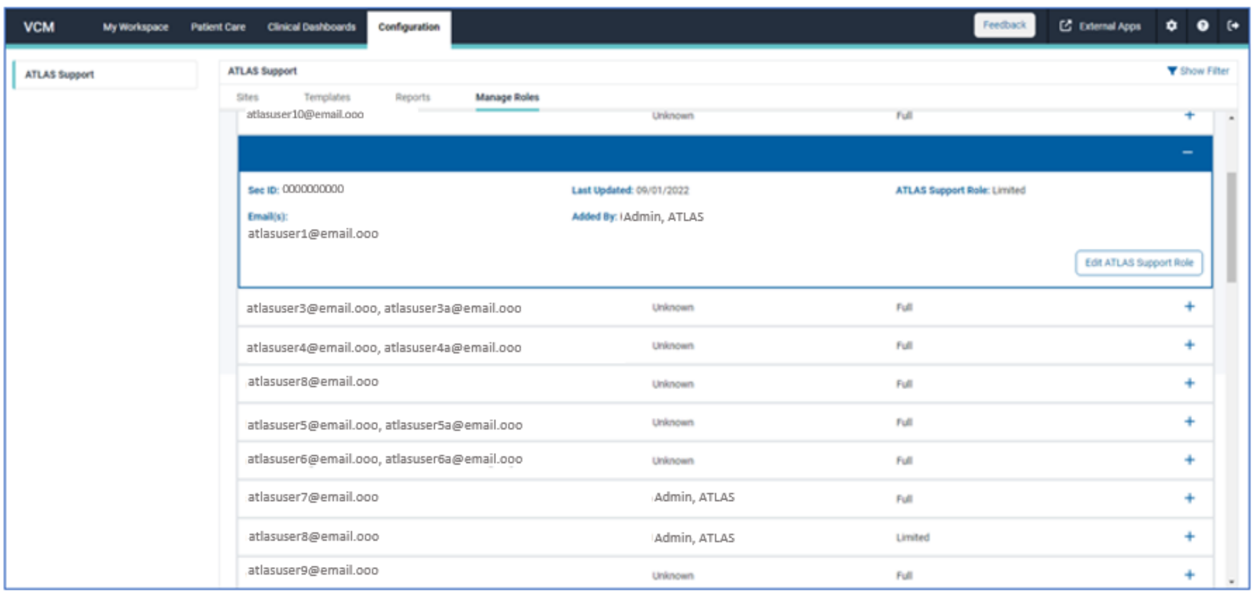
7.1.4.2 Manage Roles Table View

a. If users are already added to the listing, a table for **Manage ATLAS Support Roles** will display with the following columns from left to right: Email(s) (*User Preference*), Added By, and Role (i).
   - **i.** The **Email(s) (*User Preference*)** column will include the email(s) of the individual as read-only text
   - **ii.** The **Added By** column will include the name of the user (Last Name, First Name) who added the second level access user as read-only text.
   - **iii.** The **Role** column will include the role that each individual has (e.g.: Full or Limited). The column header includes an information icon (i). When selected a modal displays for more information on what each role means.



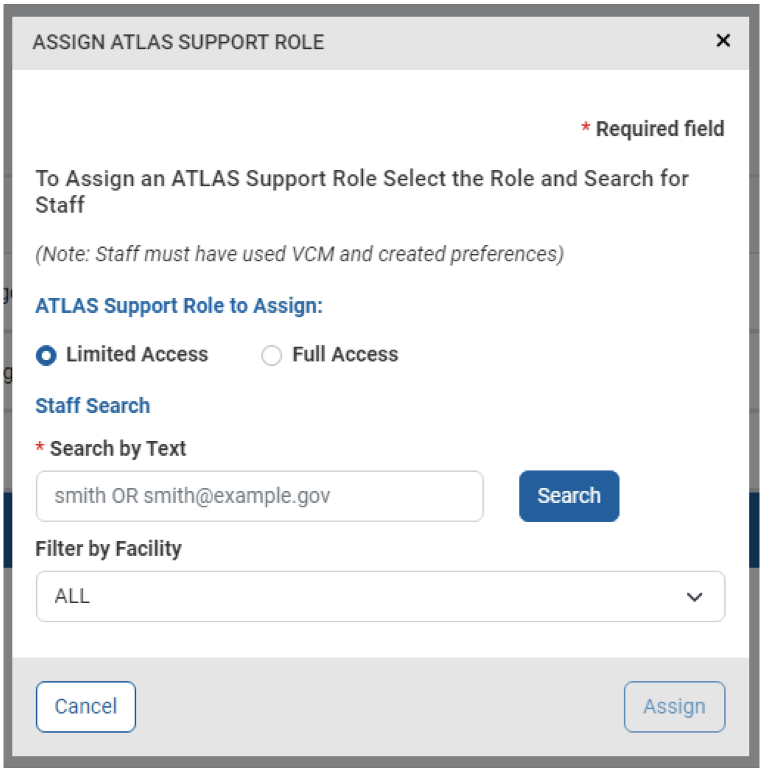


b. There will be a '+' icon located to the far right of each row
    i. Upon expanding the row, the detail view will include the user's SecID, Email(s), Last Updated date, Added By, and the ATLAS Support Role.

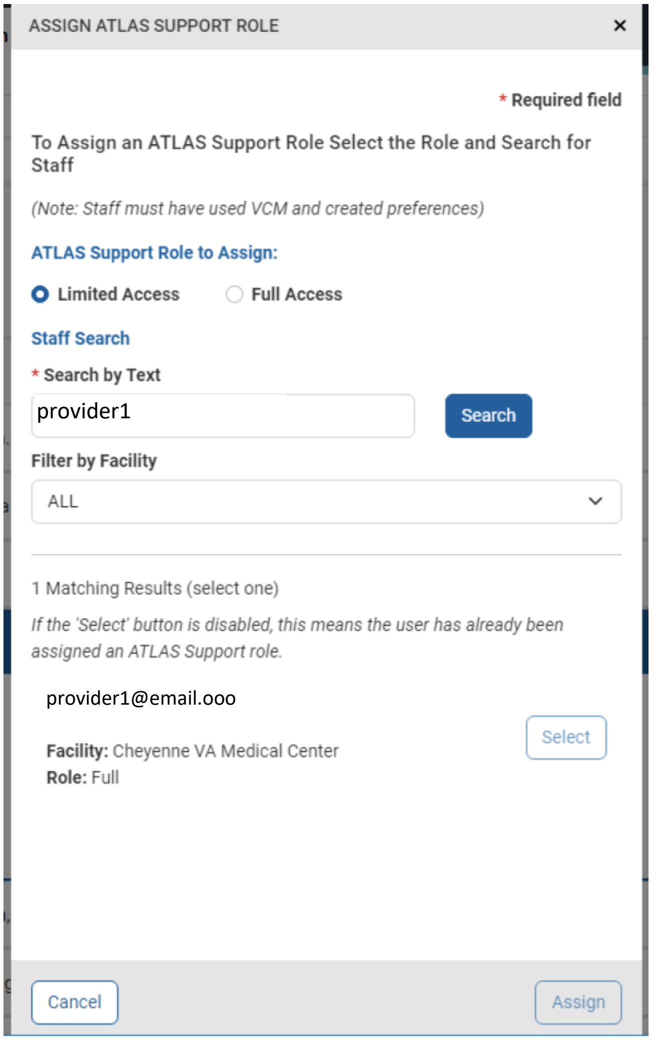


7.1.4.3 Add ATLAS Support User

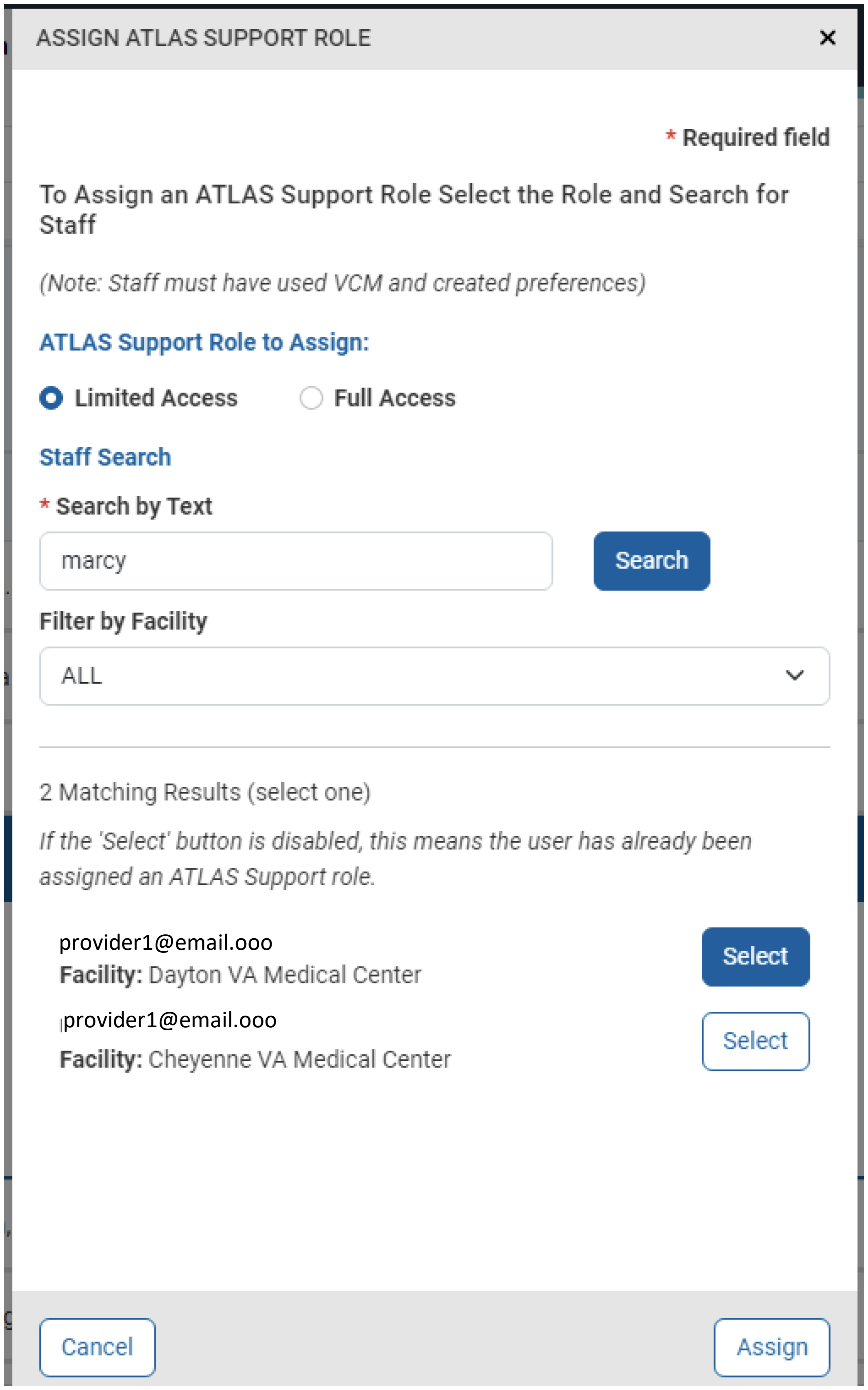
a. In order to add an individual as an ATLAS Support user, there will be an Assign ATLAS Support Role button located in the upper right corner (above the table).
b. Upon selecting the **Assign ATLAS Support Role** button, a modal displays in order to find the individual that needs to be added.



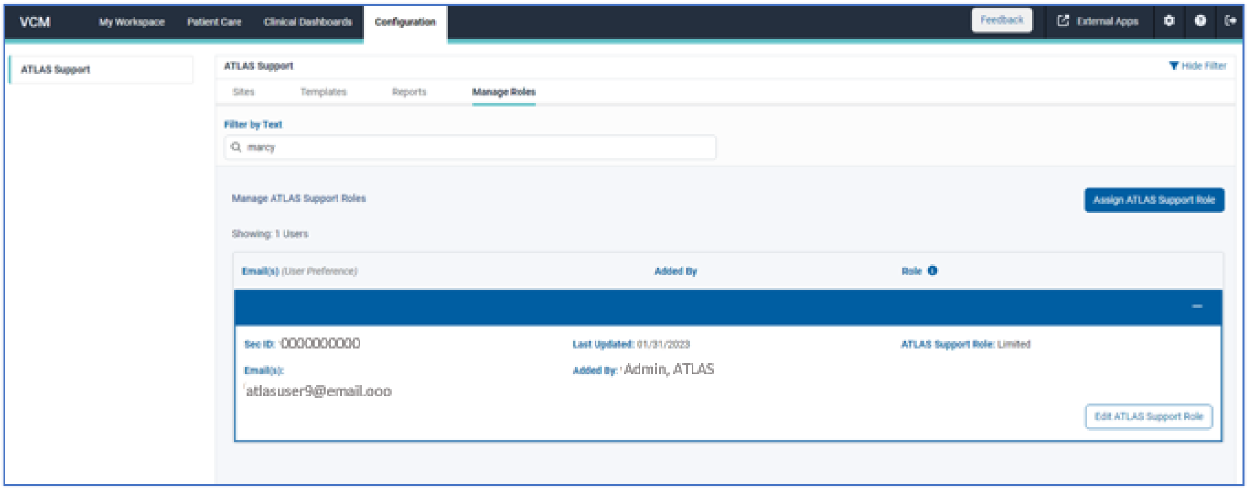
c. In order to search, text must be entered within the **Search by Text** field. Facility can also be selected in order to narrow the search further, but it is optional. Upon entering text and selecting the **Search** button, a list of individuals matching the text entered will display.



d. The user must know which ATLAS Support role they want to assign to the individual. There will be radio buttons at the top (default will be **Limited Access**) in order to select to which role the user should be assigned.
e. The **Select** button will be disabled if the user has already been assigned an ATLAS Support role. If user has not been assigned an ATLAS Support role in the past, then the **Select** button will be enabled and the user must select in order to assign the role.

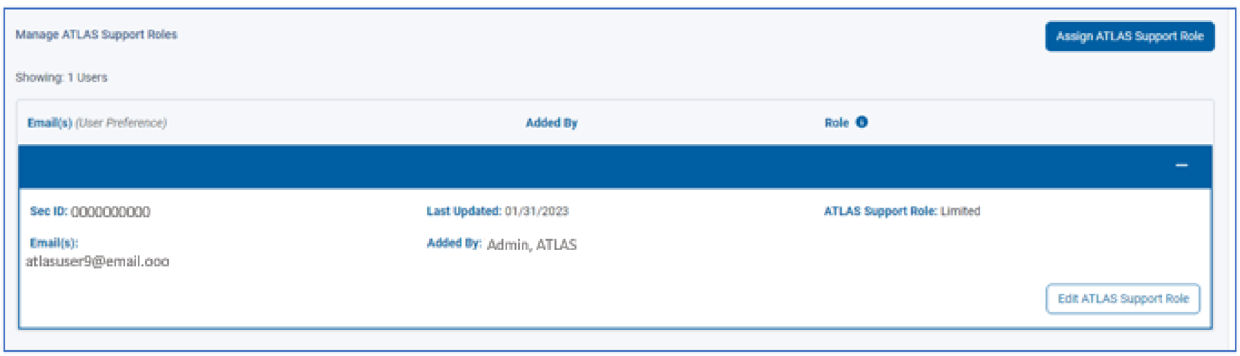


f. Selecting the Assign button will assign the individual the specified role and will display within the table view.

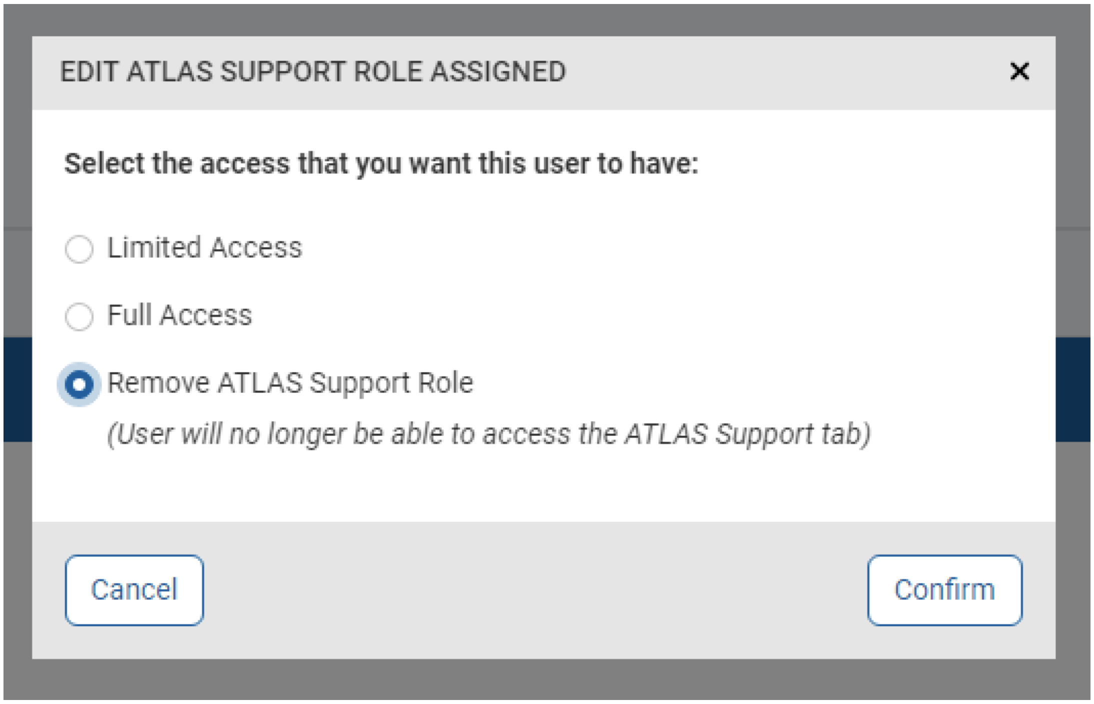


13.1.4.4. Edit ATLAS Support User

a. An individual from the table can also be edited or removed if necessary. In order to edit or remove an individual, they must be located within the table and upon expanding their row to view details there will be an **Edit ATLAS Support Role** button located in the lower right corner.



b. Upon selecting the **Edit ATLAS Support Role** button, a modal displays to either update their current role from Full Access to Limited or Limited Access to Full. There is also an option to remove the individual from ATLAS Support Access altogether (Note: An individual cannot remove themselves from a role within this modal). There is also an option to **Cancel** if necessary.



c. Upon selecting the **Confirm** button, the modal will close, and the individual will have their access updated. If removed, they will no longer display within the Manage Roles table. An individual can be added back by selecting the **Assign ATLAS Support Role** button and searching them through the database again.

7.2 Facility Contact Information

Within the Configuration Tab of Virtual Care Manager (VCM), users will find one or two workflows within Facility Contact Information, depending on level of access: 1) **Location Emergency Contacts**, and 2) **Manage User Access.** In this User Guide, **Support Users** are those with access to manage Location Emergency Contacts, and **Administrators** are those with access to Manage User Access and Location Emergency Contacts.

Important note about User Access:

1. Access to **Location Emergency Contacts:** In order for VCM users to be granted access to Location Emergency Contact, the VCM user must have logged in and must have established Preferences in Settings
2. Access to **Manage User Access:** This access is assigned to a small number of Administrators who will manage Location Support users' access to manage Location Emergency Contacts. The Manager User Access tab will not be visible to those without access.

7.2.1 Location Emergency Contact

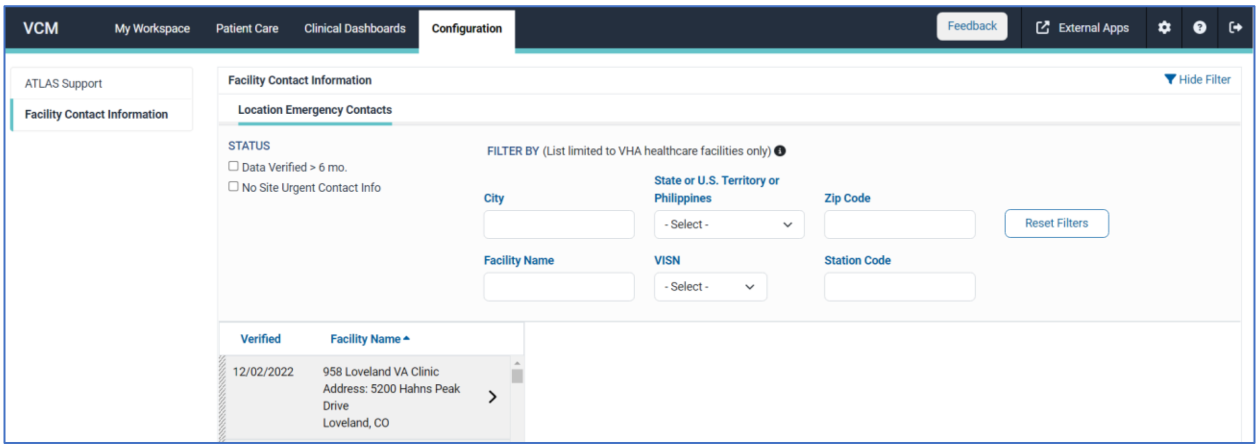
Support users can filter the list of all Veterans Health Administration (VHA) facilities regardless of the facility into which they authenticated. to identify and select a particular facility in order to update the facility's urgent contact information. Maintaining accurate Facility Contact Information is crucial to supporting VA healthcare providers during a clinic-based Telehealth appointment, in the event that an emergency notification needs to be initiated during an appointment. Keeping an accurate record of Facility Contact Information ensures the safety of Veterans.

In Location Emergency Contacts, VCM Support Users with access can complete the following tasks:

- Filter through the list of all VHA facilities to identify and select a particular facility
- Verify that the Facility Contact Information at the selected site is correct
- Edit the Facility Contact Information if it needs to be updated or corrected

7.2.1.1 Filter list of VHA facilities

Location Emergency Contacts displays a list of all VHA facilities when no filters have been applied to narrow the list results. To apply filters select "Show Filter" (see image below).



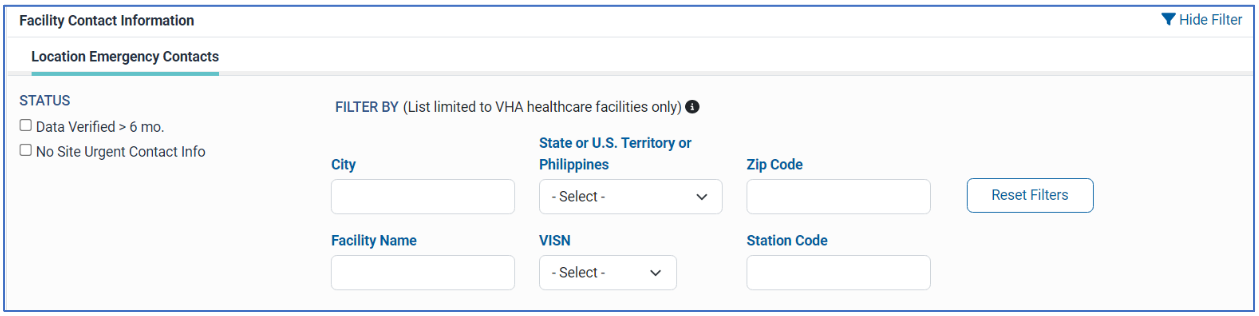
When accessing the Location Emergency Contacts, five search filters are displayed, two status filters, and a populated list of all VHA facilities.

The image below displays all filters available to narrow your facility search. To identify a VHA facility in the list, use any combination of the five filters – City, State, Zip Code, Facility Name and/or VISN to narrow search the results in the Facility Name list view:

- **City:** If you know the name of the city where the facility is located, enter three or more letters in the spelling of the city's name. Examples include DET for Detroit, or CHI for Chicago.
- **State:** use the State dropdown list filter to select the state in which the facility is located. You may scroll or type the first letter of the state to jump to that state in the dropdown list and make your selection.
- **Zip code:** If you know the zip code where the facility is located, type in the full 5-digit numerical zip code to narrow the facility search.
- **Facility Name:** If you know the name of the facility, enter three or more letters in the spelling of the facility name to narrow your search. Entering as much of the facility name as possible will help further narrow the results.
- **VISN:** If you know the VISN where the facility is located, use the VISN dropdown list filter to select the VISN where the facility is located. You may scroll or type in the whole number of the VISN to jump to that VISN in the dropdown list to make your selection.

- **Station Code:** If you know the facility Station Code, enter the complete Station Code to produce the result for the desired facility.

  Note: An info icon near the filters listed above offers suggestions to optimize the use of filters to identify the desired facility.

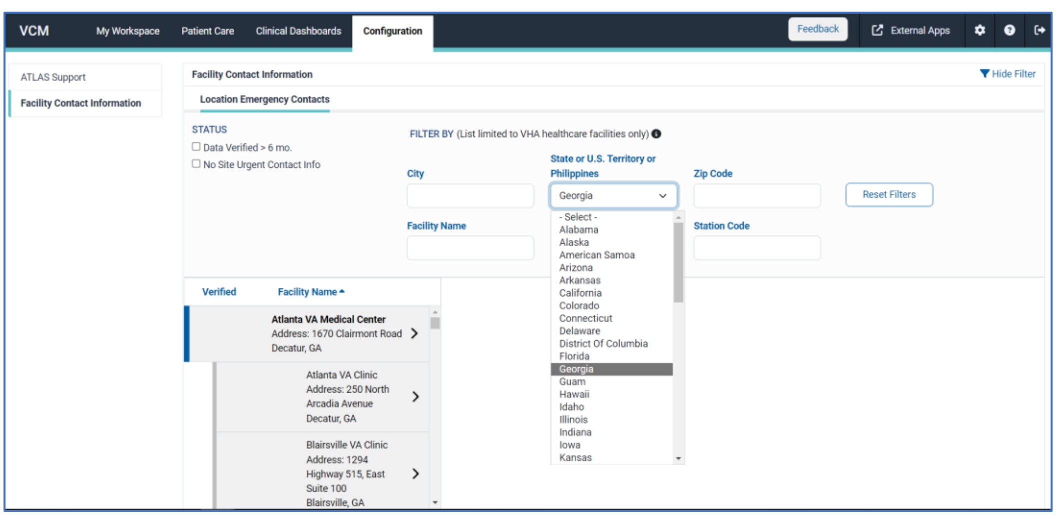


Status Filters: Note the Status filters in the image above. Selecting one of these filters will further narrow the list of filtered results to facilities that have not had the Facility Contact Information updated in the a past six months or to those facilities for which there is no Facility Contact Information. In addition to narrowing the filtered search results, selecting these filters also helps identify facilities that are in need of updates and maintenance of the Facility Contact Information.

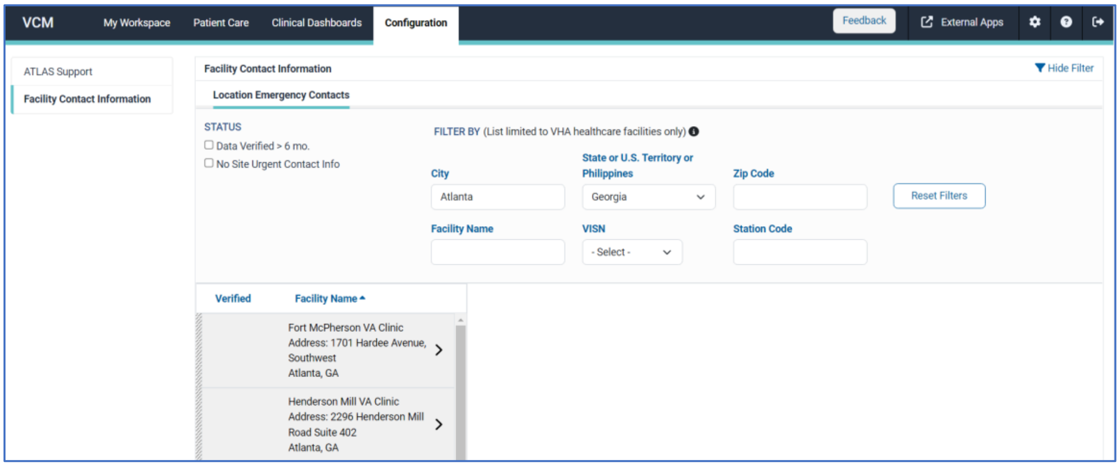
Reset Filters: To remove selections from all filters and begin a new filtered search, select the "Reset Filters" button.

Below are several examples of a variety of filtered searches and their results:

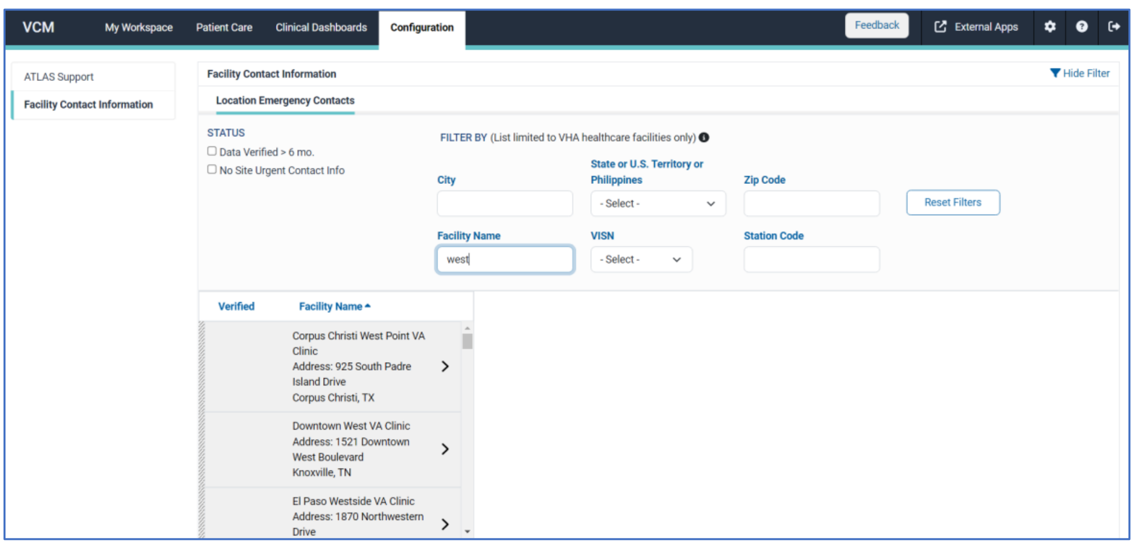
Example of a filtered search by State only: This filtered search results in all VHA facilities within the selected state of Georgia, with the option to scroll through returned results. Applying more filters narrows the results.



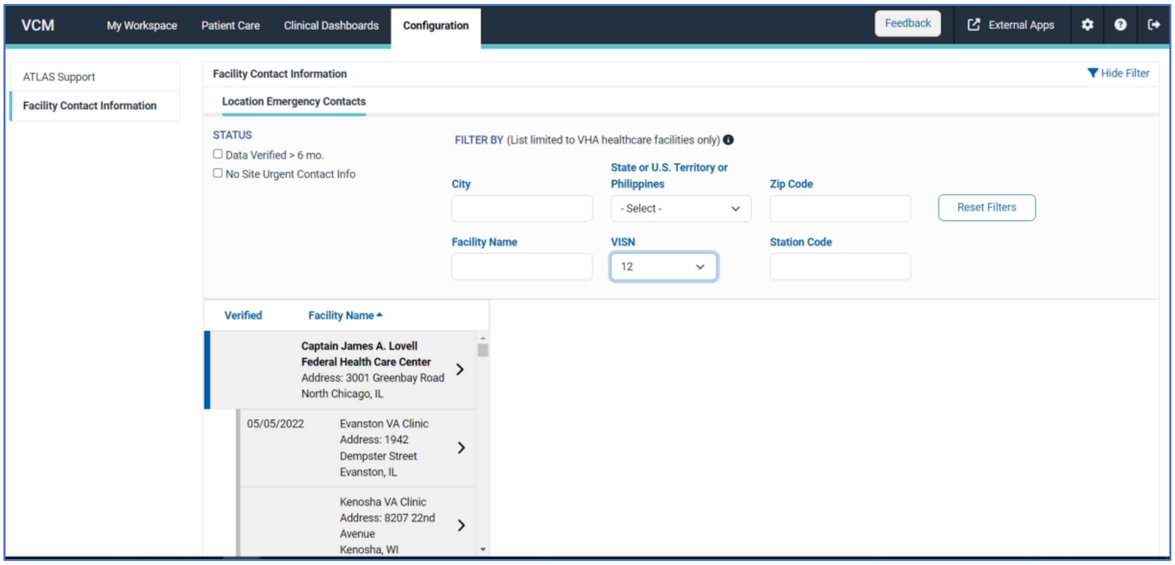
Example of a filtered search by State and City: This filtered search results in all VHA facilities within Atlanta, Georgia, and has significantly narrowed the search results compared to the State only filtered search above.



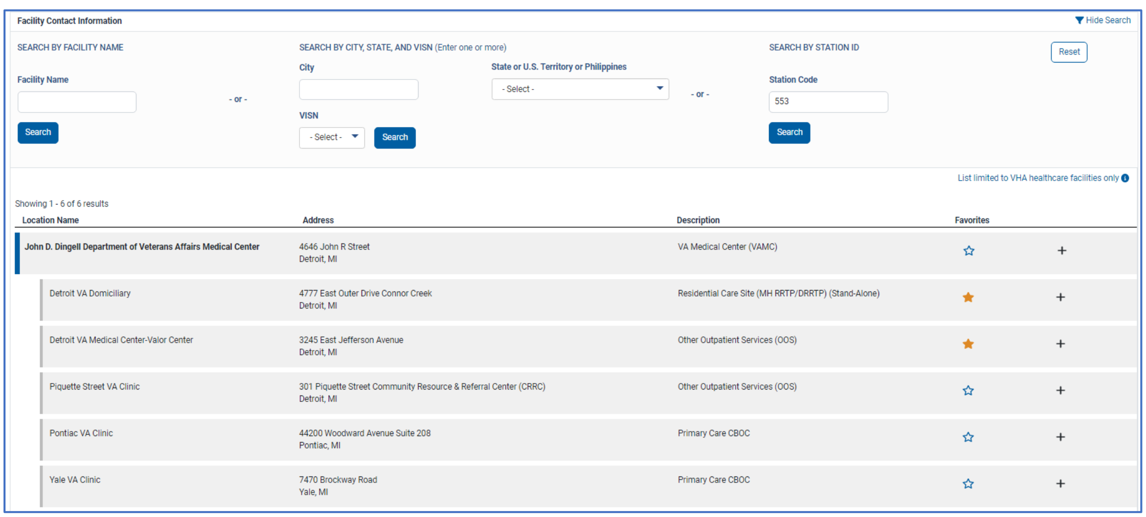
Example of a filtered search by Facility Name: The Facility Name entered is "West", narrowed the filtered search results to only VHA facilities that have the word "West" anywhere in the Facility Name, even if it's part of another word, such as "Westside".

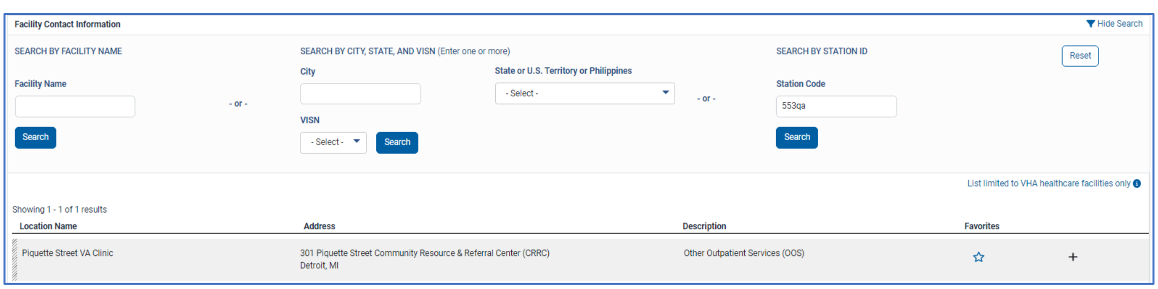


Example of a filtered search by VISN only: This filtered search results in all VHA facilities within the selected VISN 12, with the option to scroll through returned results. Applying more filters narrows the results.

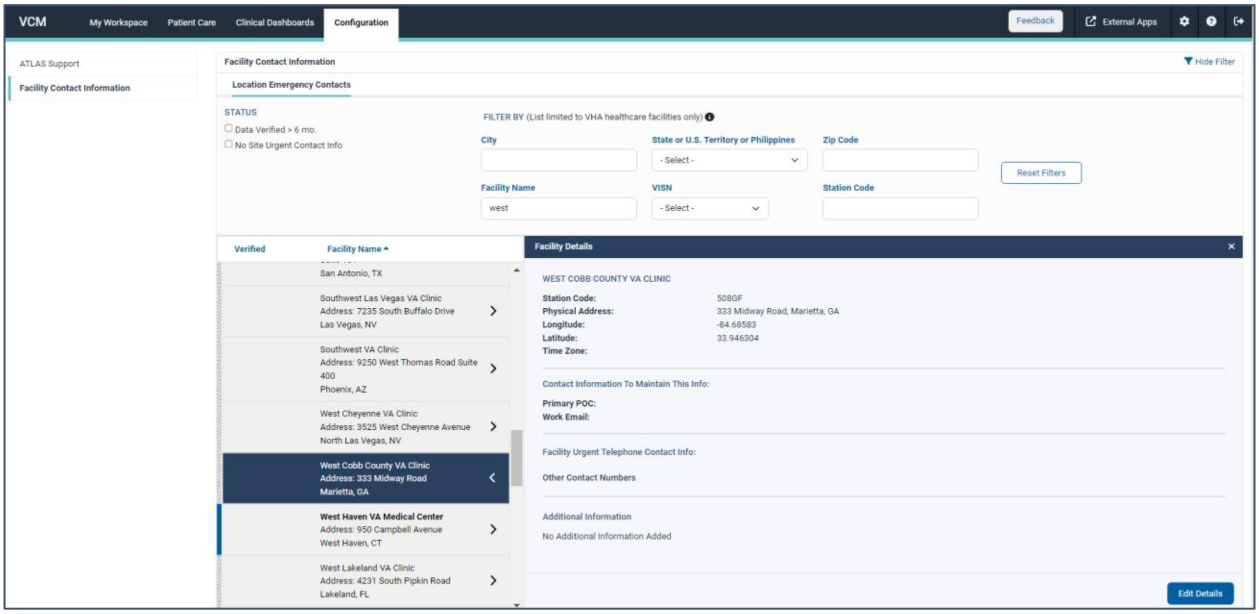


Example of a filtered search by Station Code only: This filtered search results in all VHA facilities containing the three-digit Station Code. If a more specific Station Code is known, the search will produce only one result. See the example below of results for Station Code 553 resulting in all facilities associated with John D. Dingell VAMC versus a more specific search of Station Code 553QA resulting in only one facility associated with John D. Dingell VAMC.





Making a Facility Selection: Once the desired facility result is returned in the Facility Name list, click the arrow icon to the right of the Facility Name. The facility result will turn from gray to blue, and Facility Details will display at right (see image below) so that action may be taken for the selected facility.



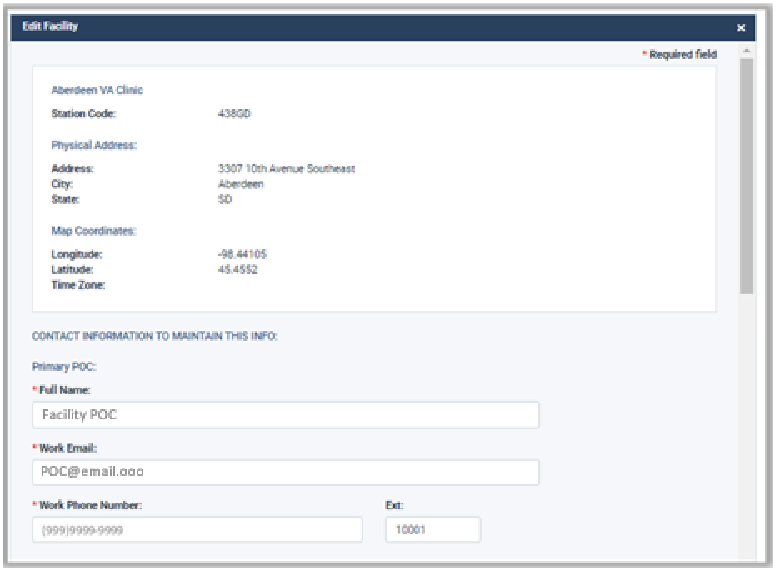
7.2.1.2 Verify the Facility Contact Information at the Selected Site

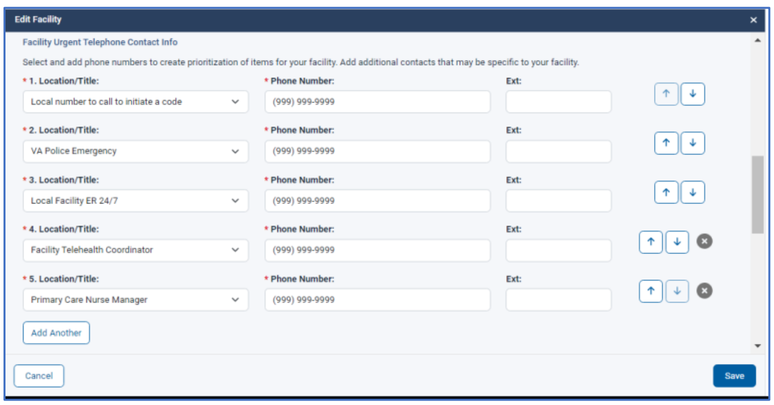
Once the selected Facility Details are displayed (see image above), the Facility Contact Information can be reviewed to ensure that all contact details are correct. If the data is correct upon review, click “Verify as Correct” and the date that the contact information is verified will automatically update with the date of the verification.

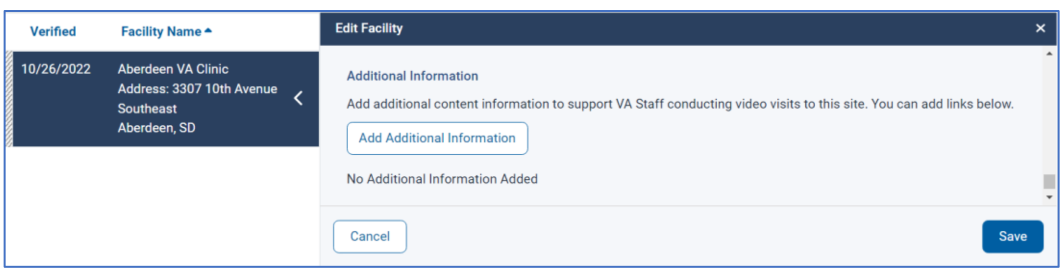
7.2.1.3 Edit the Facility Contact Information

If the review of the Facility Contact Information reveals that the contact details are incomplete or inaccurate, click “Edit Details” (see image above). Once selected, you will see “Edit Facility” display. The first section of facility information cannot be edited, but all fields below “Contact Information to Maintain This Info” can be updated to ensure accurate and complete information.

Any field with a red asterisk at the top left of the field indicates that this is a required field, so information needs to be entered before the information can be saved. As information is updated, select “Add Another” to enter more fields of data, as needed. Once the information has been completely updated, select “Save”. The “Save” button cannot be selected until all required fields are created. If you have entered the “Edit Facility” display and do not wish to update any information, select “Cancel”.

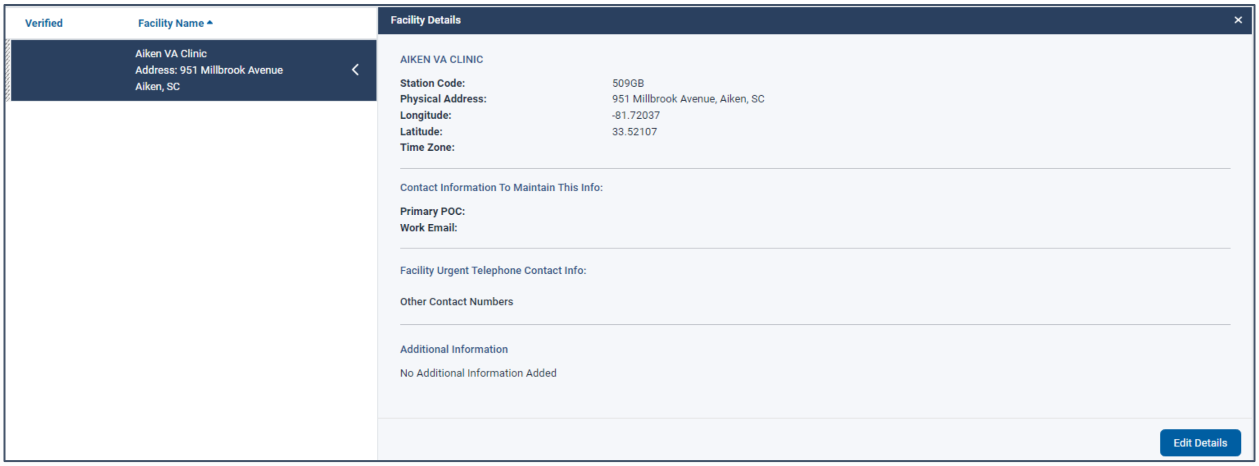




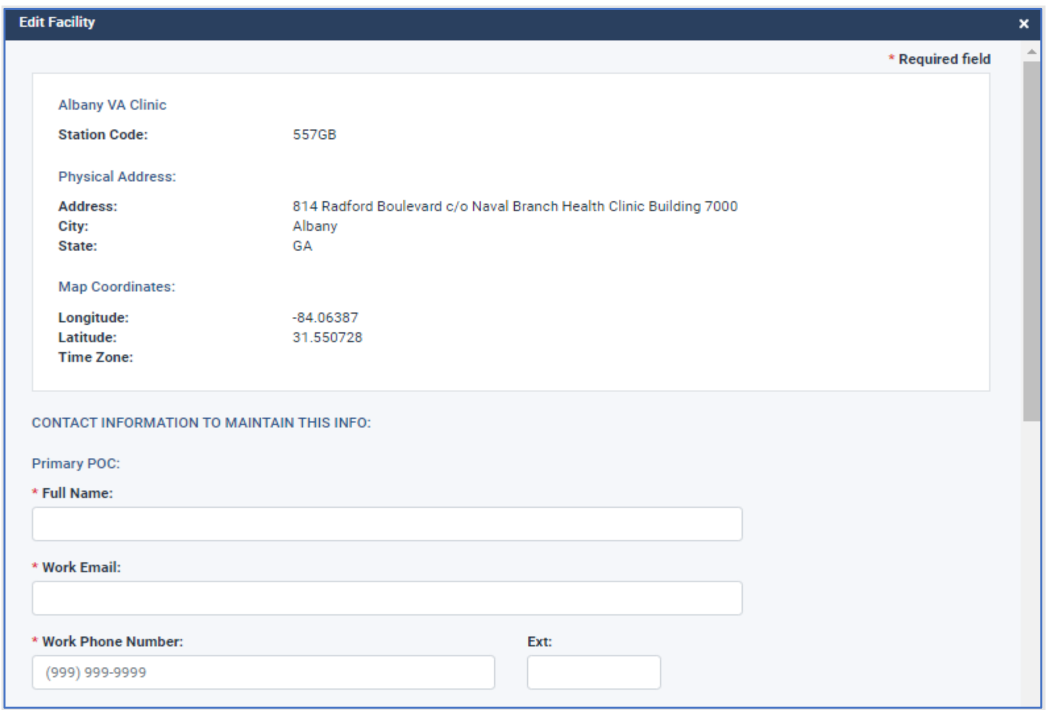


7.2.1.4 Edit Facility Detail

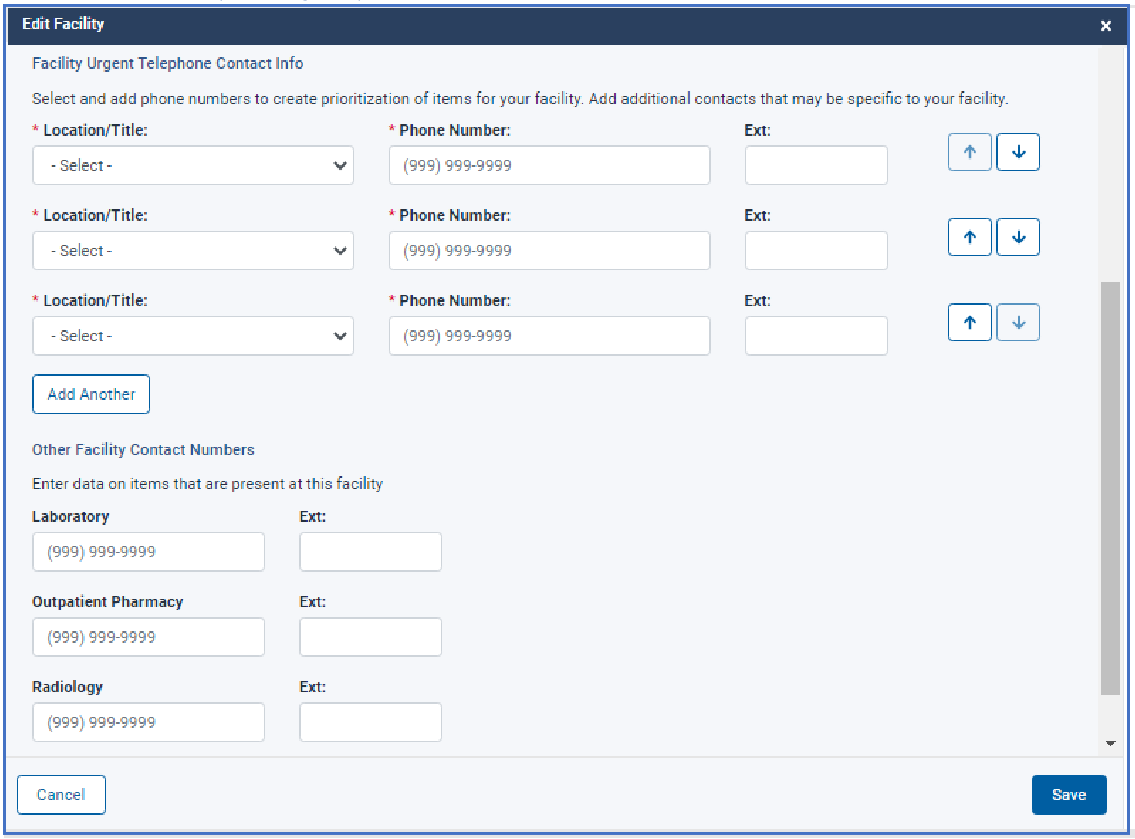
If no Primary POC information is listed for a facility, select the Edit Details button on the Facility Details screen, to add a Primary POC.



On the Edit Facility screen, the location details are pre-populated, with the Station Code, Address, and Map Coordinates. Add the Primary POC contact details and scroll down to manage additional facility-specific information.



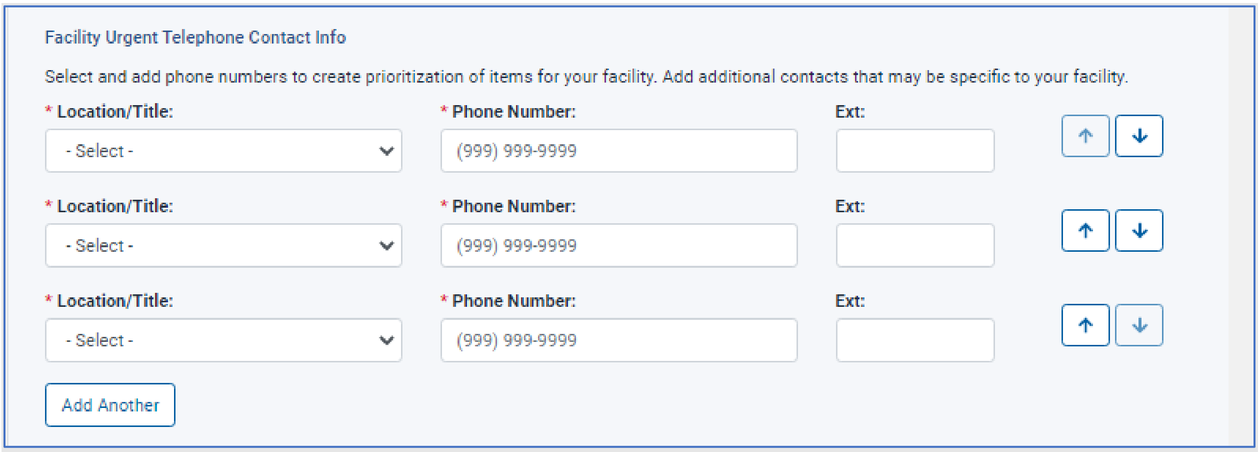
7.2.1.5 Facility Emergency Notification List



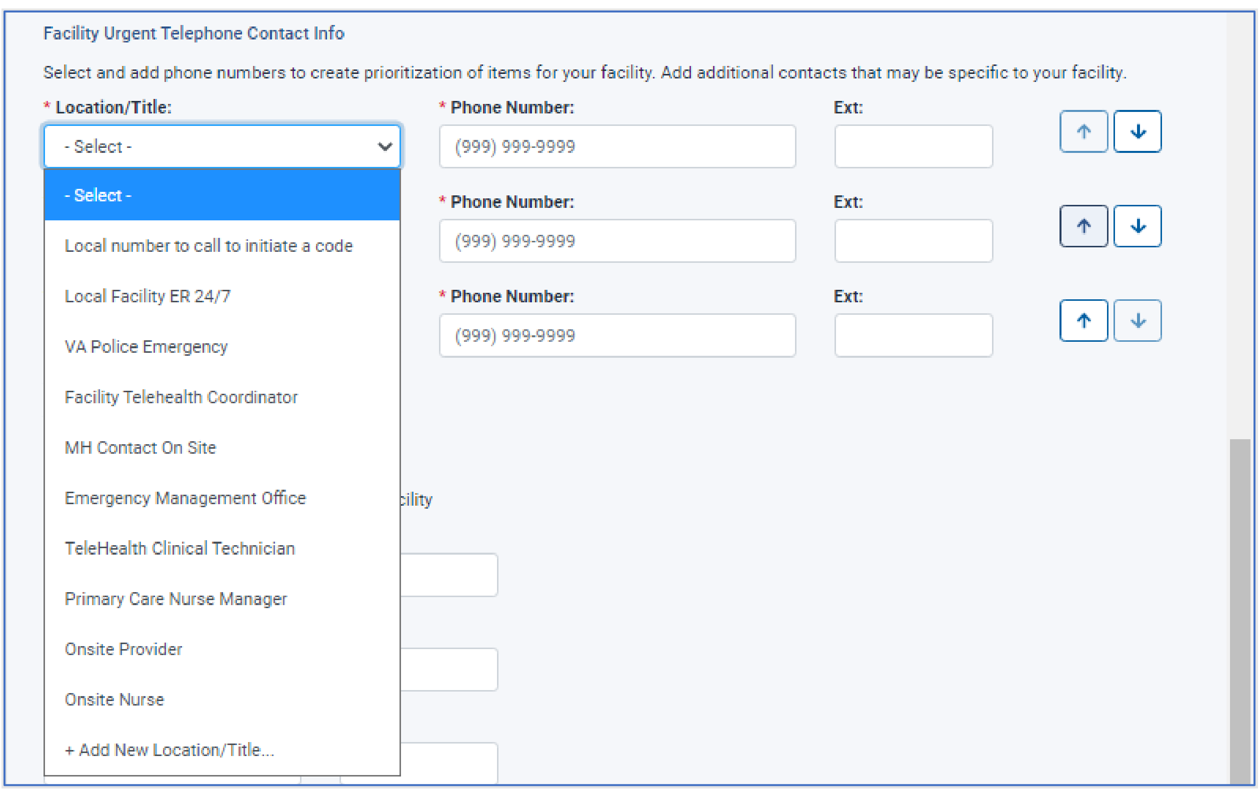
In the Emergency Notification List section, select the Add Recipients Info button to add entry fields to the facility info.

7.2.1.6 Facility Urgent Telephone Contact Info

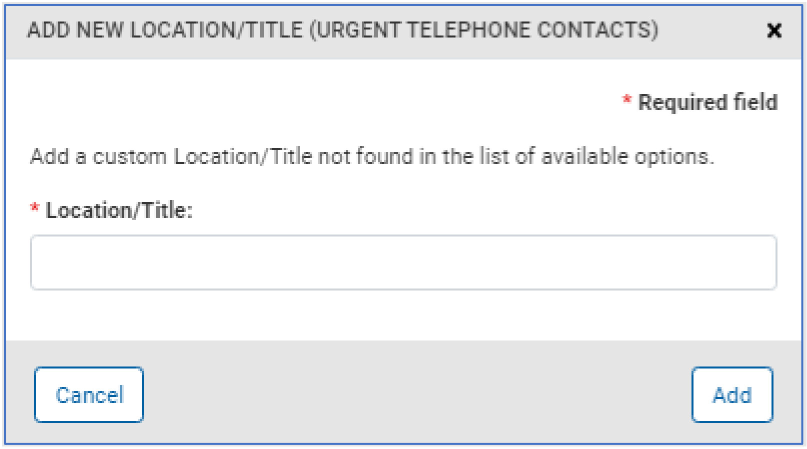
In the Facility Urgent Telephone Contact Info section, three rows will appear by default and are required. The contacts entered here will display as the initial contact list in case of an emergency during the video visit.



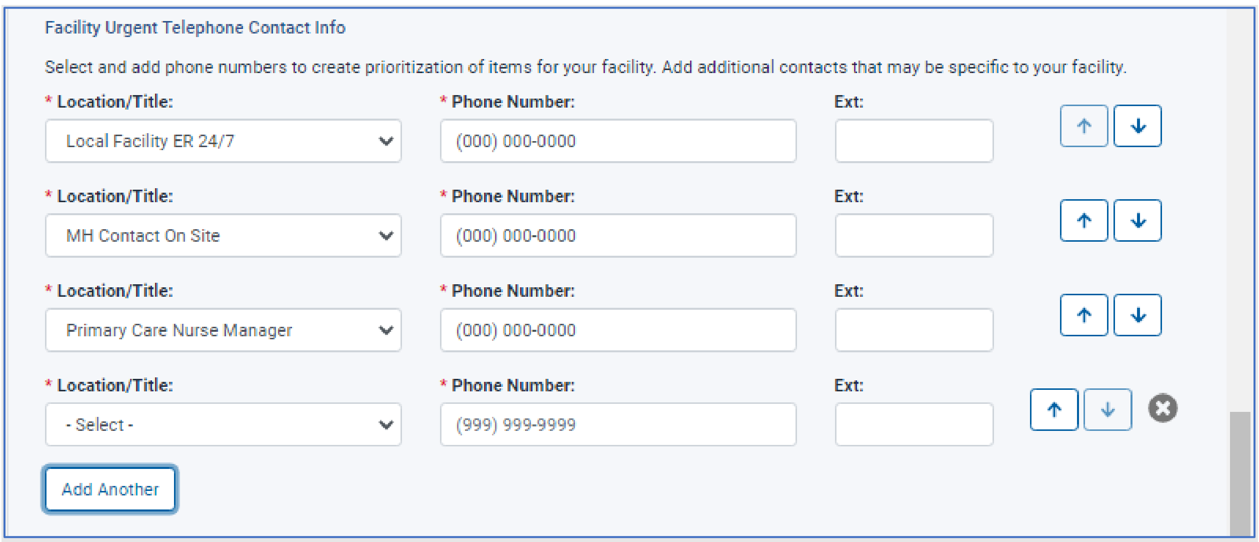
Adjust Location/Title using the drop-down menu to view options.



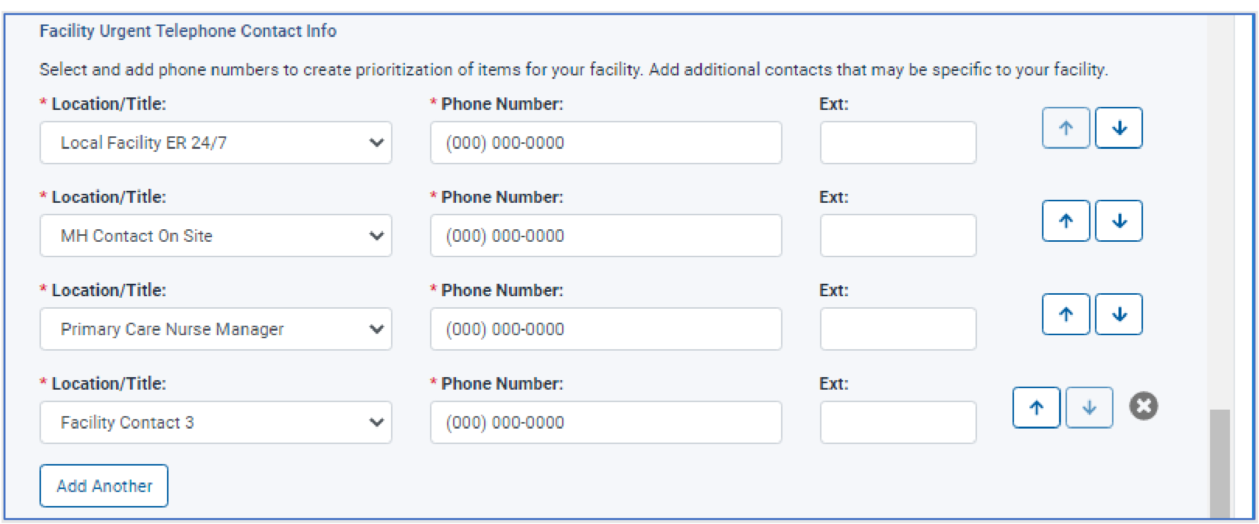
If a desired location type is not listed, select the +Add New Location/Title option to customize the list of location types.



If contact information needs to be captured for more than three types of locations, select the Add Another button to display an additional entry row.

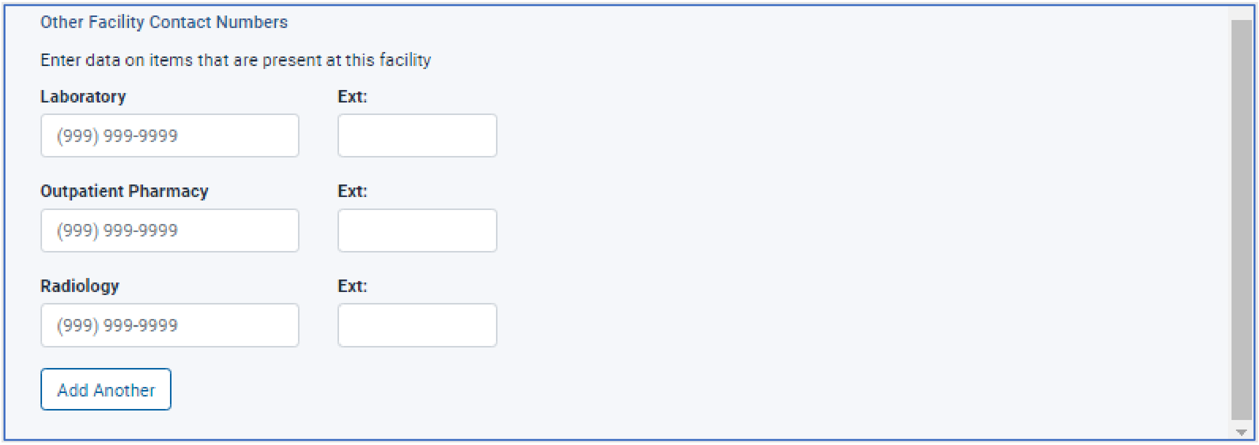


Contacts can be prioritized by adjusting the order using the up/down arrows displayed at the end of each contact row.

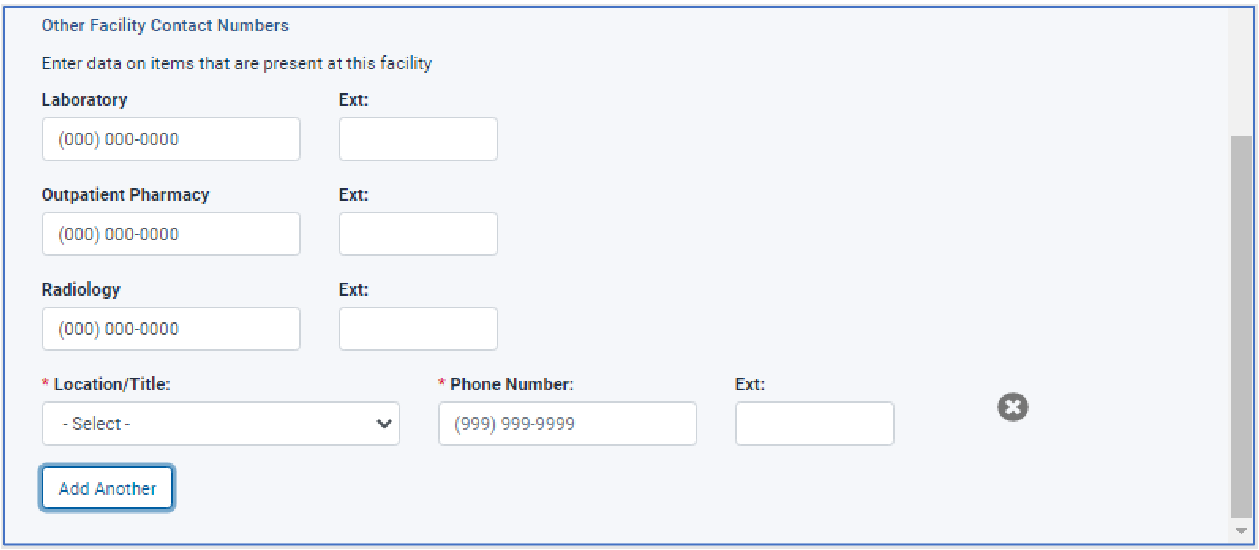


7.2.1.7 Other Facility Contact Numbers

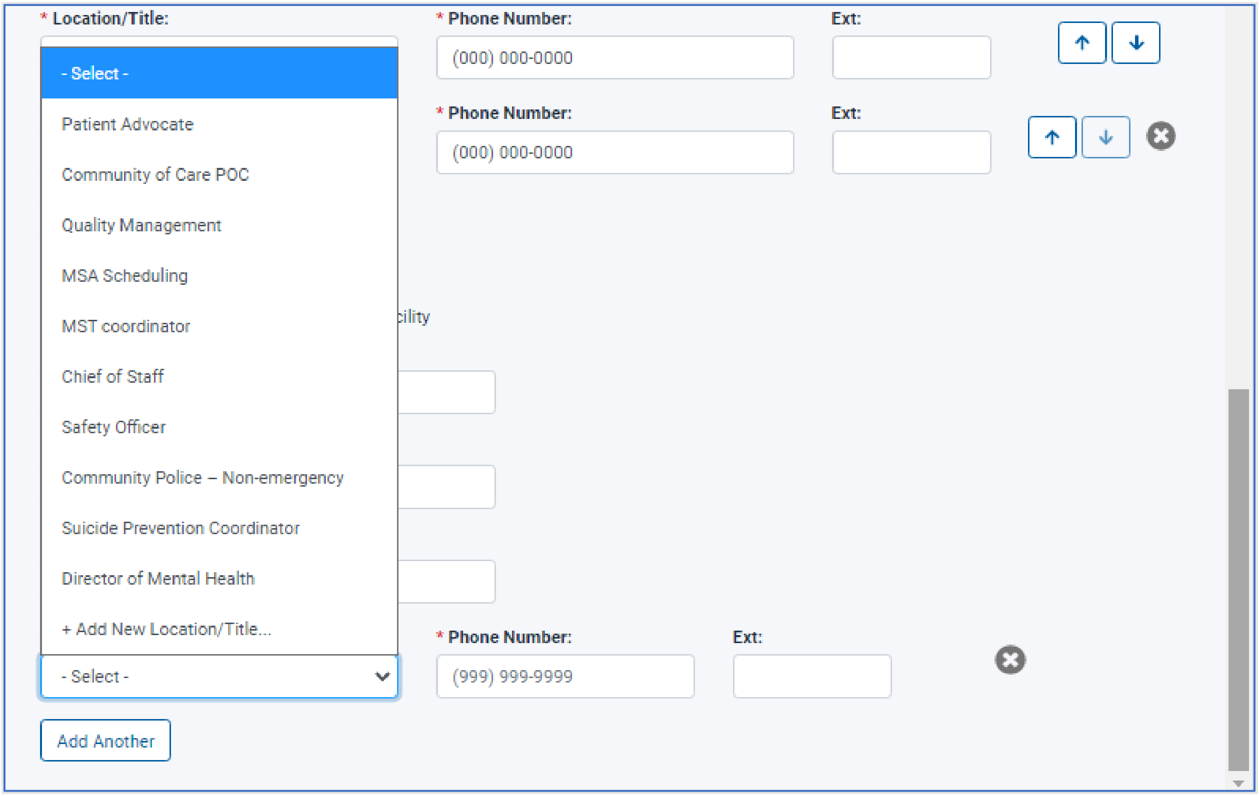
In the Other Facility Contact Numbers section, manage the information for the three default contacts.



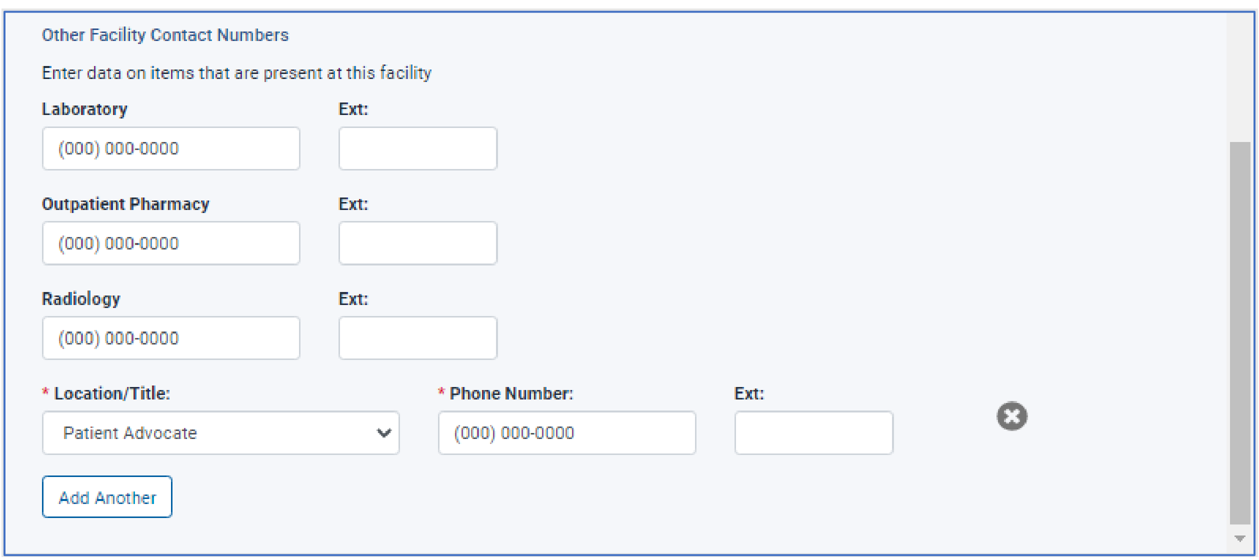
List more contacts by selecting the Add Another button.



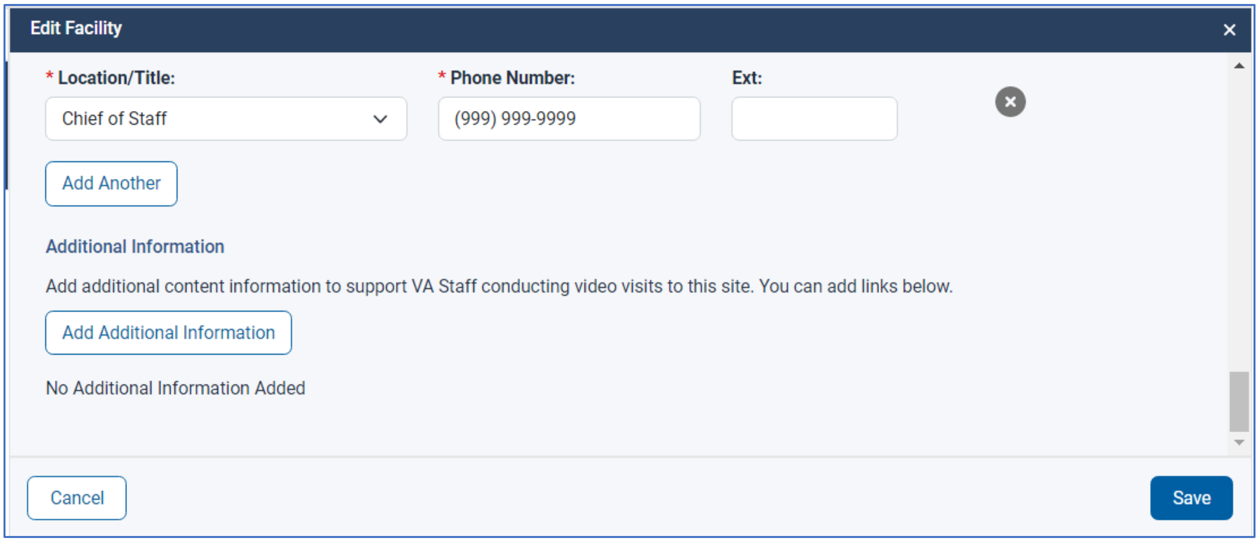
Select the drop-down list to designate the type of contact in the Location/Title field.

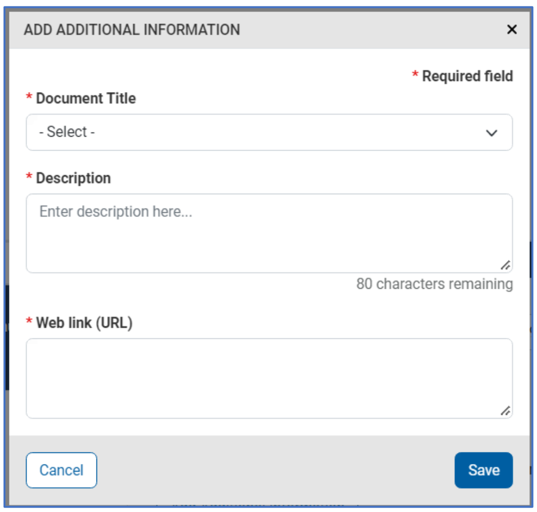


Add additional contacts, or quickly revise the list by selecting the “X” button at the end of the contact information row.



Users may add additional information, in the format of web links, to Facility Contact Information by selecting Add Additional Information and following the prompts to enter in the additional information and Save or Cancel.





7.2.1.8 Facility Contact Verification Reminders

Five (5) months after the Facility Last Verified Date, an email will be sent to the Facility Primary POC and the person who verified the Facility, notifying them to check, update, and re-verify the Facility Contact information.

If the Facility Contact information has not been updated six (6) months after the Last Verified Date, reminder emails will be sent weekly to the Facility Primary POC, the person who verified the Facility, and VCM Managers.

7.2.2 Manage User Access

A limited number of Facility Contact Administrators will have access to the Manage User Access feature. Administrators with access to this feature may add and remove access for Urgent Care Users, FTCs and others who need to have access to the Location Emergency Contacts tab described above. Only these administrators are able to add and remove access to Location Emergency Contacts.

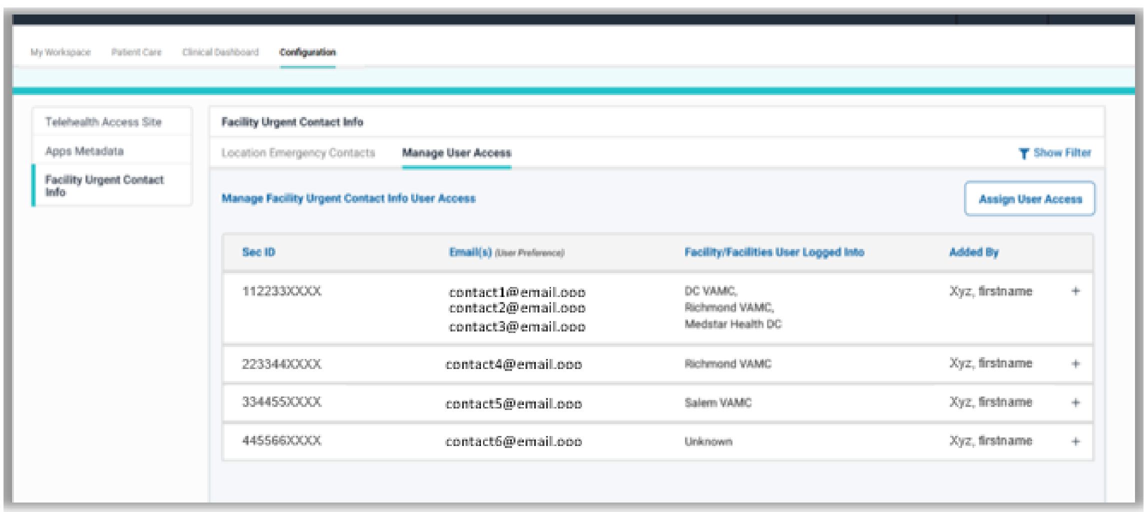
In Manage User Access, a limited number of UC Administrators with specific access to this feature can complete the following tasks:

- View the list of current staff with access to Location Emergency Contacts
- Filter through the list of staff names and email addresses (text match) to identify and select a specific user (*Note: in order to appear in the list of filtered results, staff must have used VCM and created preferences)
- Add access to “Location Emergency Contacts” for the selected staff
- Remove access to “Location Emergency Contacts” for a specific staff

Note: Access to Manage User Access is restricted to a few VCM users. The “Manage User Access” tab will not be visible to users unless they have Urgent Care Administrator access.

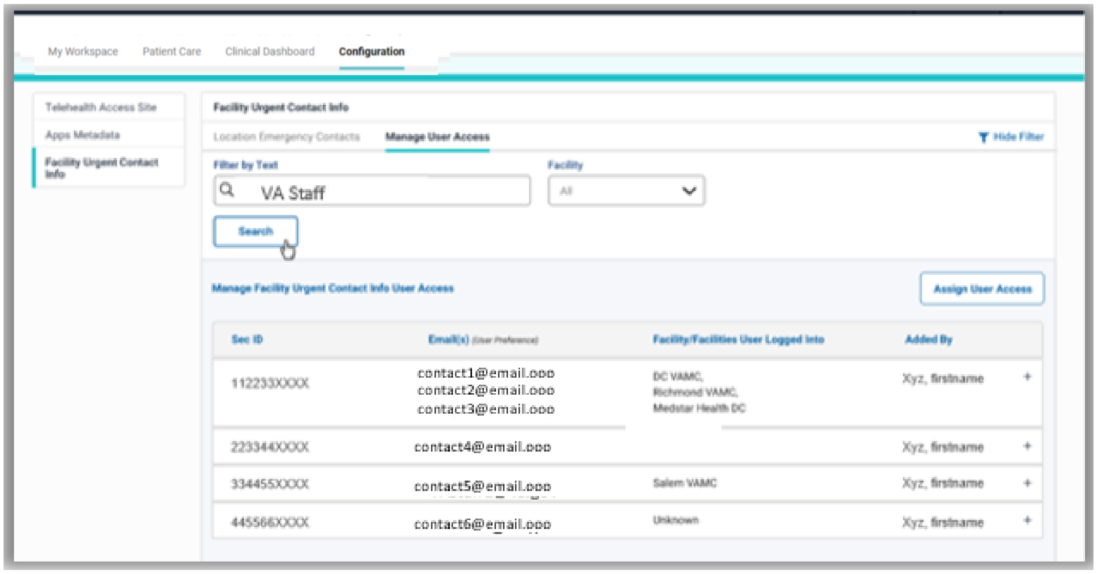
7.2.2.1 View staff with access to Location Emergency Contacts:

Manage User Access displays a list of all staff* when no filters have been applied to narrow the list results. When accessing the Manage User Access, select “Show Filter” to display the two filters available to narrow the list results. The image below shows the list with no filters applied when the “Show Filter” option has not yet been selected.

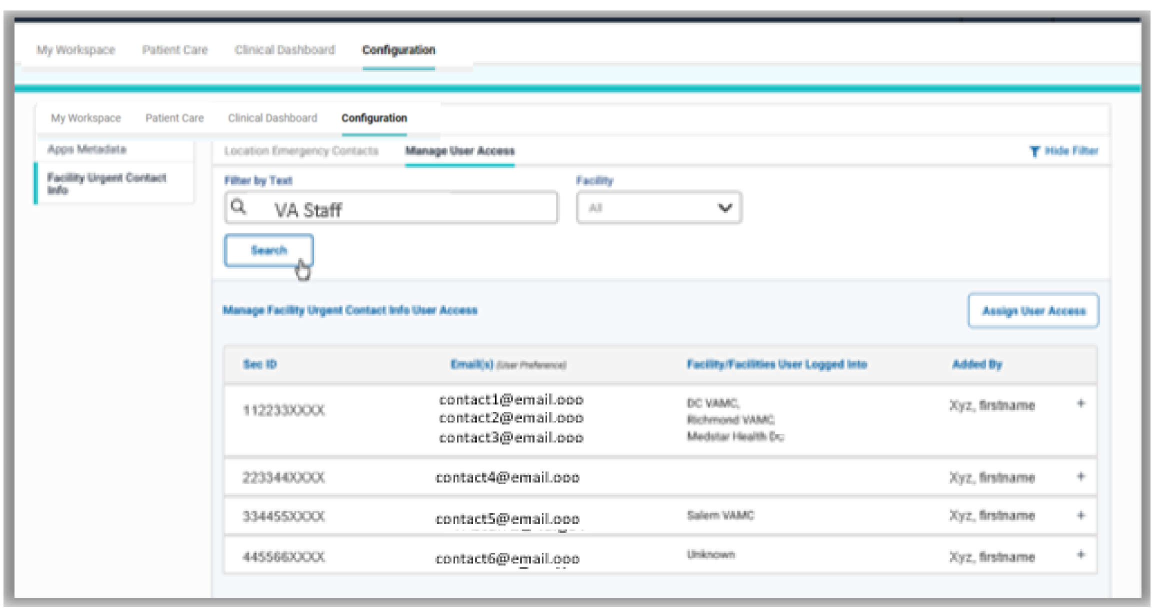


7.2.2.2 Use filters to identify specific users:

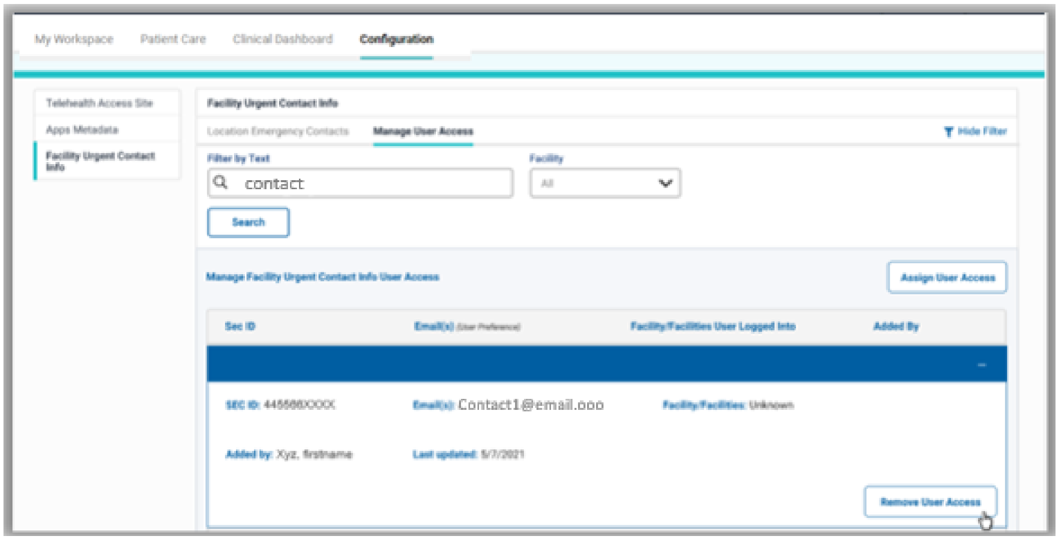
Once “Show Filter” is selected, two filters display: “Filter by Text” and “Facility”. One or both fields may be used to narrow the list of results (see image below).



- **Filter by Text:** In this field, all or part of the user's email address may be entered to narrow the list of results. Partial entries may include all or part of the user's name, as it appears in their email address. In the examples in the image above, partial results could include "VA Staff", "staff" or "staff1". The more specific or unique the term entered in the filter is, the more the list results will be narrowed.
- **Filter by Facility:** The filtered results can be further narrowed by selecting one of the facilities that the user is known to log into. If the first letter of the facility name is known, it can be entered into the dropdown field to jump to facilities starting with that same letter to facilitate the selection from the dropdown menu. Otherwise, you may scroll through the facility results.



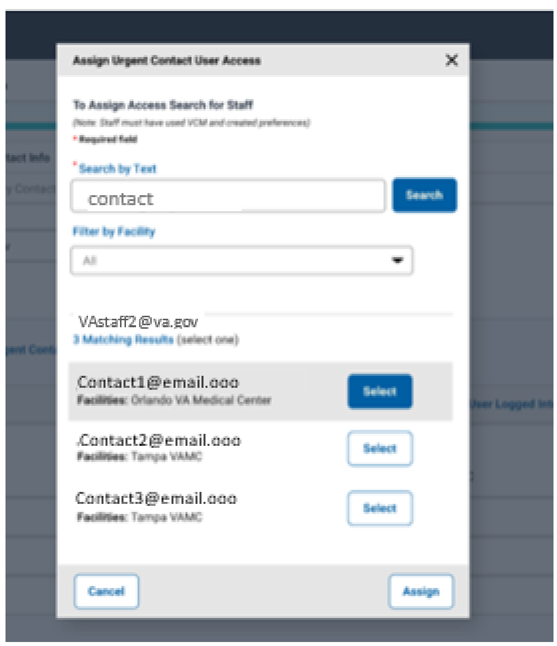
Select any staff member in the list and select the plus sign to expand the staff member's information for more details (see image below), including last date information was updated, and to take additional actions described in detail under "Remove Access" below.



7.2.2.3 Add user access to Location Emergency Contacts:

As seen in the images above, the “Assign User Access” button is displayed in “Manage User Access” regardless of whether the filter is shown or hidden. Selecting “Assign User Access” opens a modal with the ability to “Search by Text” and/or “Filter by Facility” to identify the staff member for which access will be granted to “Location Emergency Contacts” (see image below):

Search by Text: In this required field, all or part of the user’s email address may be entered to search for the staff member in need of access. Partial entries may include all or part of the user’s name, as it appears in their email address. The more specific or unique the term entered in the search field is, the more the list results will be narrowed.



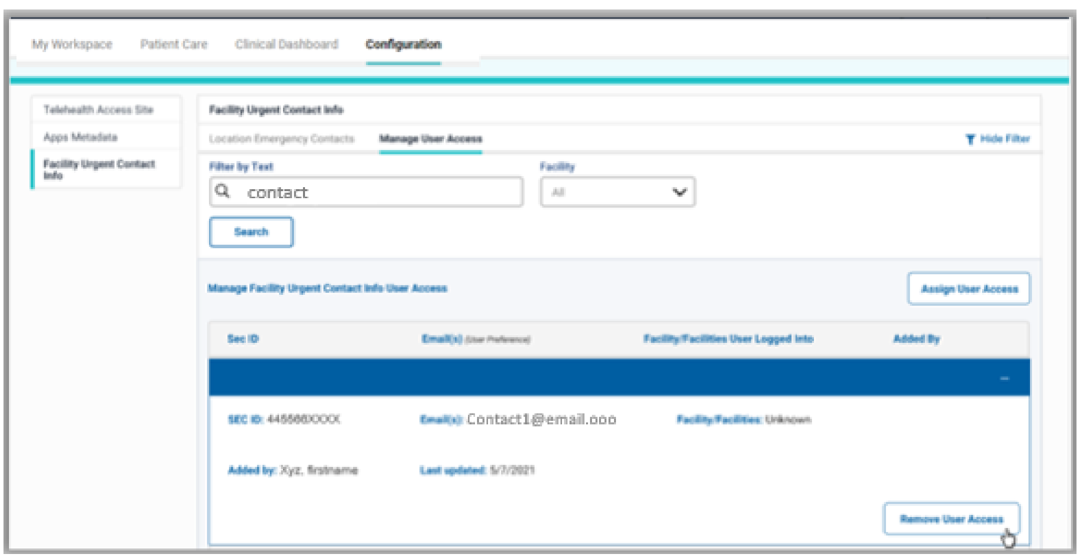
- **Filter by Facility:** Filter by Facility is not required, but search results may be further narrowed by selecting one of the facilities that the user is known to log into. If the first letter of the facility name is known, it can be entered into the dropdown field to jump to facilities starting with that same letter to facilitate the selection from the dropdown menu. Otherwise, you may scroll through the facility results.

Upon selecting the "Search" button, matching results will appear. If the optional facility filter is not applied, the same user may appear multiple times if he/she logs into multiple facilities. In the example below, this all-facilities search for "VA Staff" produced a result for the desired staff member with a unique name. The "Select" button next to the staff's name is clicked and selecting "Assign" will then assign access to the selected staff for "Location Emergency Contacts". If a staff member appears in the search multiple times due to affiliations with multiple VHA facilities, their name will appear in multiple rows in the search results. If the staff member is assigned as a Support User, their name will stop appearing in the search results only if all of their facility profiles have been assigned. Once a Support User is granted access to Location Emergency Contacts, they will have access at all facilities/for all facility logins, but they may continue to show up in search results if they are affiliated with multiple facilities and not all of their profiles were selected when assigning access.

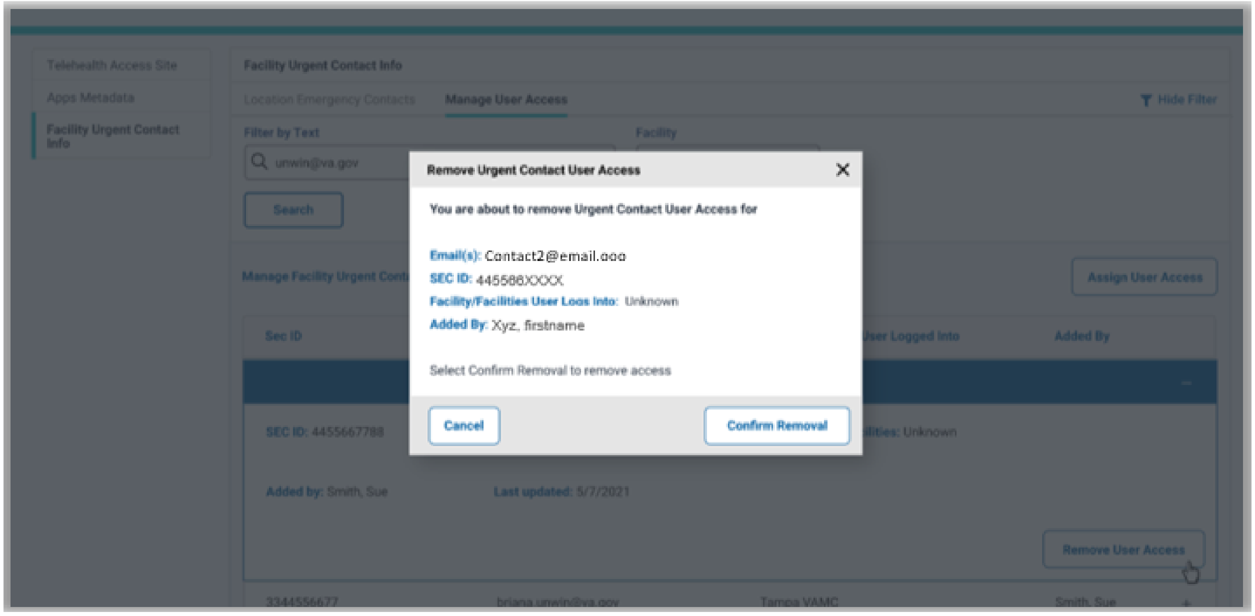
7.2.2.4 Remove staff access to Location Emergency Contacts:

To remove the access of any staff member previously granted access, from the "Manage User Access" main tab, select "Show Filter" and apply the "Filter by Text" and/or "Facility" filter options to search for the desired staff (see item #2 above).

Once the staff member is identified, select the plus sign next to his/her name to expand the details on the staff member and display the option to "Remove User Access" (see image below).

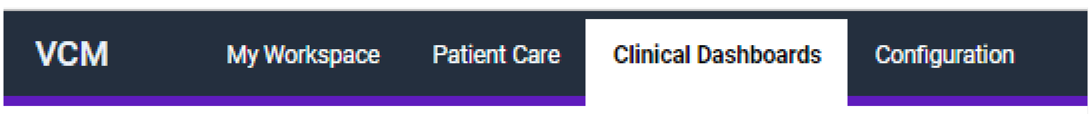


Once "Remove User Access" is selected, you will be prompted to review the information on the staff member and confirm removal of the staff member's access to "Location Emergency Contacts" by selecting the "Confirm Removal" button, bottom right (see image below). If you'd like to maintain access for the staff member, select "Cancel" instead.



8. Clinical Dashboards

The Clinical Dashboard Tab in Virtual Care Manager provides users with access to clinical condition-specific dashboards for use by care providers. The data represented in these dashboards comes from the VA's Corporate Data Warehouse (CDW) and from patient-generated health data (PGH) that Veterans have chosen to share with the VA through various means.

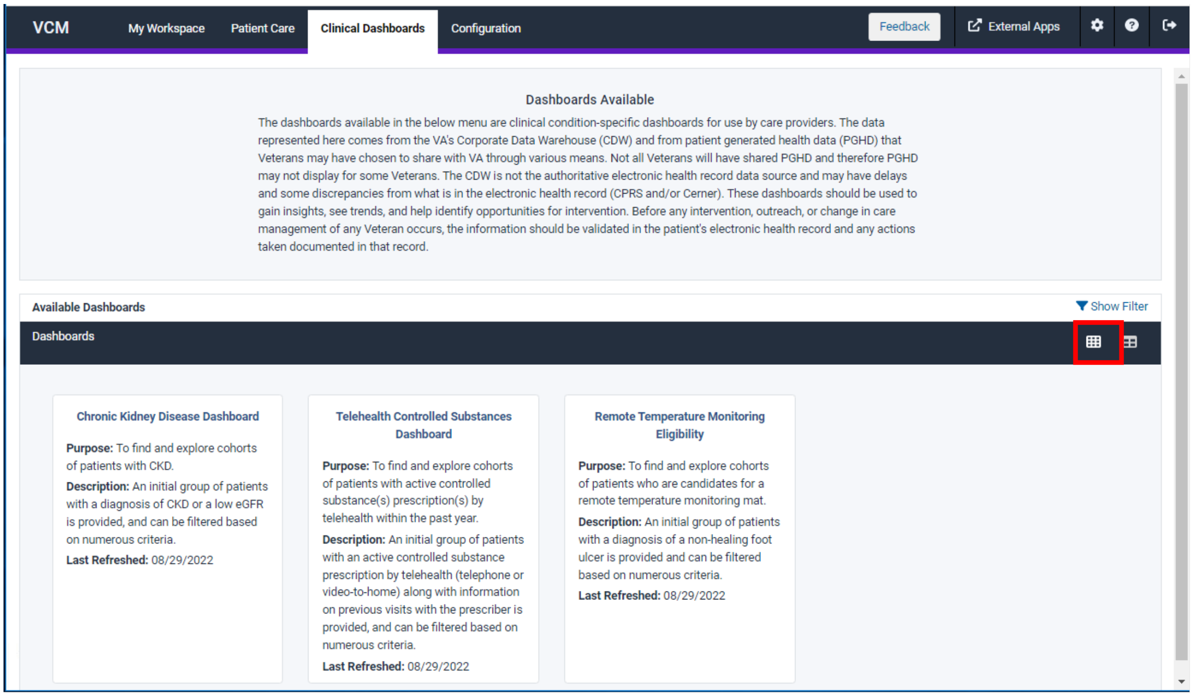


8.1 Available Dashboards

Within the Clinical Dashboards Tab, users will have a view of all available clinical dashboards. Available clinical dashboards may be displayed in **Tile View** or **List View**, depending on the user's preference and selection. Both **Tile** and **List View** display the name, purpose, and brief description of each Clinical Dashboard, as well as the date that the dashboard data was last refreshed.

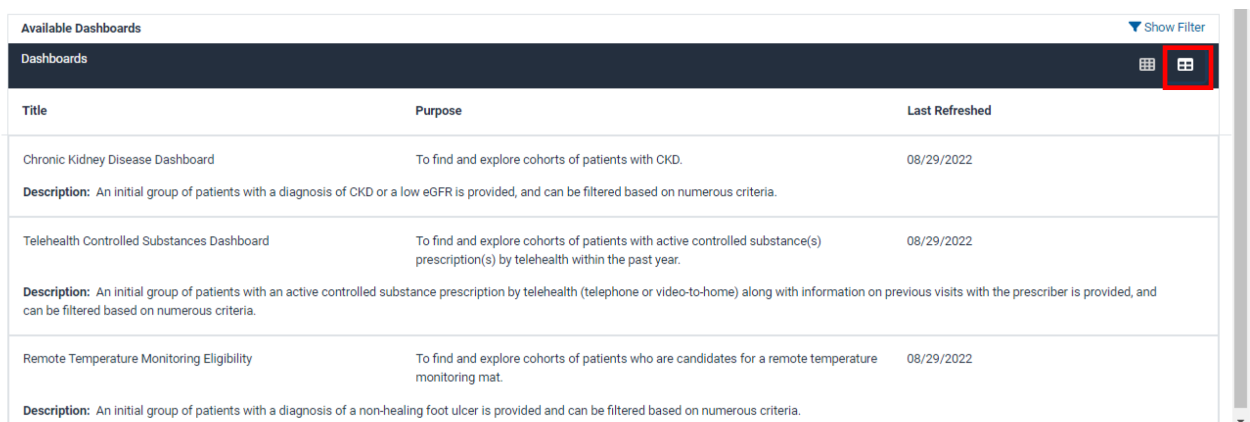
8.1.1 Tile View of Available Dashboards

The user may select the option to display available dashboards in **Tile View**, as shown in the image below. The display defaults to **Tile View**.



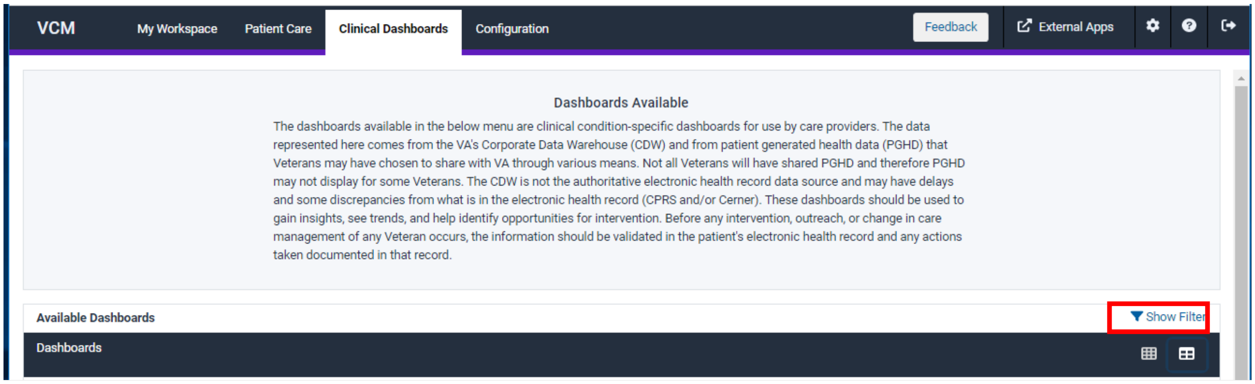
8.1.2 List View of Available Dashboards

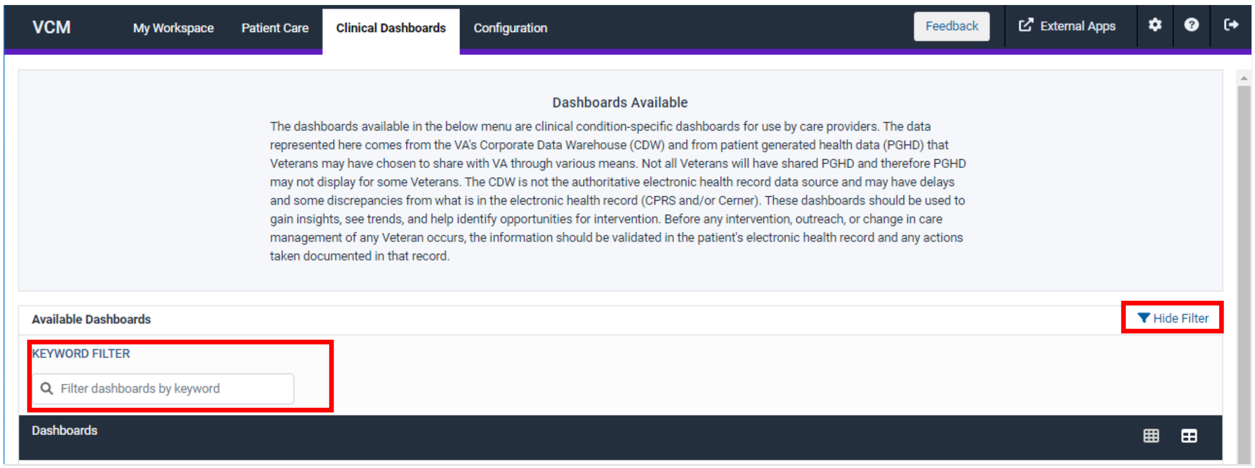
The user may select the option to display available dashboards in **List View**, as shown in the image below.



8.1.3 Searching for Desired Clinical Dashboard

When searching for a specific Clinical Dashboard within Available Dashboards, the user may find that the desired Clinical Dashboard is visible within the Tile View or List View. If the desired Clinical Dashboard is not easily found, the user may select **Show Filter** to display the **Keyword Filter** (see images below). By entering any word that is found in the title or the description of the desired report, the dashboard option(s) containing the keyword(s) searched for will display for user selection.





8.2 Opening a Clinical Dashboard for View

To open the desired Clinical Dashboard from **Tile View**, the user may click anywhere on the tile of the desired dashboard and the dashboard will open in a new browser. To open the desired Clinical Dashboard from **List View**, the user may click anywhere within the row where the desired dashboard is listed and the dashboard will open in a new browser.