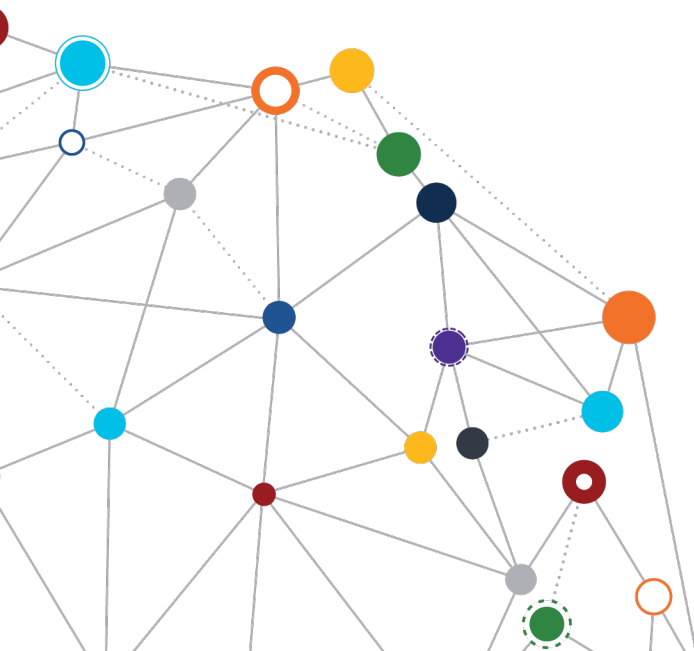




VSE For Clinical Staff User Guide

Version – 1.28



VA



U.S. Department of Veterans Affairs
Office of Information and Technology
Enterprise Program Management Office



Revision History

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1 Introduction

The Department of Veterans Affairs (VA) Veterans Health Information Systems and Technology Architecture (VistA) Scheduling Enhancement for Clinical Staff (VSECS) module is a VA-internal web application that allows clinical staff to track patient appointments from check-in, through the clinic workflow, and to a completed appointment.

1.1 Purpose

The Veterans Health Administration (VHA) Office of Integrated Veteran Care (IVC) requested VSE for Clinical Staff, a new web application to improve the overall Veteran check-in experience and reduce operating costs for VHA.

1.2 Overview

VSECS is a VA-internal web application that allows staff at VA clinics to manage appointment workflow at a clinic or set of clinics. Users can customize the application to display daily appointments for a specific group of clinics and save multiple personal clinic lists. Users can also view and update appointments by workflow status. Refer to [System Summary](#) for a more detailed description of VSE for Clinical Staff functionality.

1.3 Disclaimers

1.3.1 Software Disclaimers

This software was developed at the Department of Veterans Affairs (VA) by employees of the Federal Government in the course of their official duties. Pursuant to Title 17 Section 105 of the United States Code this software is not subject to copyright protection and is in the public domain. VA assumes no responsibility whatsoever for its use by other parties and makes no guarantees, expressed or implied, about its quality, reliability, or any other characteristic. We would appreciate acknowledgment if the software is used. This software can be redistributed and/or modified freely if any derivative works bear some notice that they are derived from it, and any modified versions bear some notice that they have been modified.

1.3.2 Documentation Disclaimers

The appearance of external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Website or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are consistent with the stated purpose of the VA.

1.4 Project References

1.4.1 Information

The VSECS points of contact (POCs) include:

- » OIT ESE - Scheduling Support

- » IVC – I&T PCI Technical POCs – REDACTED
- » Scheduling Technical Director – REDACTED
- » IVC - Innovation and Technology Division Business/Product Owner/Director – REDACTED
- » IVC - Innovation and Technology Division Program Manager – REDACTED
- » IVC - Innovation and Technology PCI Subject Matter Expert (SME) – REDACTED

VSECS Resources

- » [VA Software Document Library \(VDL\)](#)

1.4.2 Help Desk

Refer to [Section 6](#) for additional information.

2 System Summary

VSE for Clinic Staff is a web-based, cloud-hosted application that assists with accessing and managing appointment workflow at a clinic or set of clinics. It consists of three primary functions: Daily Appointment List, Daily Workflow List, and Clinic List Management. The Daily Appointment List tracks appointments for all the clinics available under the Clinic List. The Daily Workflow List shows the current workflow status a patient is in and allows the user to track and change the status of the workflow. The Clinic List Management allows clinicians to group clinics into one manageable list.

3 User Access Levels

VSE for Clinical Staff is accessible to any VA network user who has a Personal Identity Verification (PIV) card and Identity and Access Management (IAM) account provisioned to a VistA station.

- Schedulers are required to have the SDECRPC Menu Option. All scheduling personnel should already have the menu option.
- Non-Schedulers, Nurses, and Providers are required to have SDECRPC Menu Option and SDECVIEW Key.
- Users needing access to the Queue Management tab must have SD SUPERVISOR Key assigned to them.
- Users must have SECONDARY MENU OPTIONS: VIAB WEB SERVICES OPTION to utilize patient search for queuing.

4 Getting Started

To access the VSE for Clinical Staff application, the user follows these initial process steps:

4.1 Logging Into VSE For Clinical Staff

1. To access VSECS, open either the Chrome or Edge browser and copy this hyperlink (REDACTED) into the address bar.
2. A Login window displays; click “sign in with VA PIV Card” to sign in using your PIV.

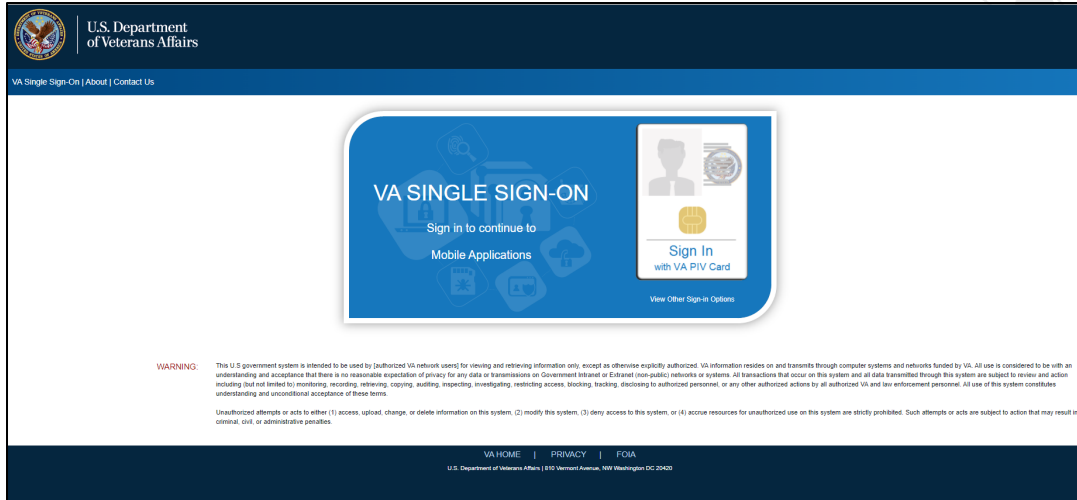


Figure 1: Single Sign-On Internal (SSOi) Login.

3. If login validation is successful, the VSE for Clinical Staff home page will be displayed.



Figure 2: VSECS Home Page.

5 Using the Application

This section describes VSECS functions inside the Daily appointment list, Daily workflow list, and Clinic list management, and how to use these tools to create, edit, view, and track patient workflow status.

5.1 Clinic List Management

5.1.1 Create New Clinic List

Creating a Clinic List allows the clinicians to group clinics into one manageable list. The Clinic List drop-down will display in alphabetical order, with the default Clinic List at the top. If you have not created a Clinic List, the appointment list view and Workflow List will not be accessible. After successfully logging into VSECS, follow the steps below to create a new Clinic List:

1. From the VSECS home page left navigation, click on Clinic List Management. If you have not created a Clinic List before it will redirect you to the Create Clinic List page, [Figure 4: Create a Clinic List](#), to create a Clinic List. If you have created a Clinic List before, the Clinic List Management page displays with the list of Clinics as shown on [Figure 3: Clinic List Management](#).
2. From the Clinic List Management page, click on Create New Clinic List and the Create Clinic List page will be displayed as shown on [Figure 4: Create a Clinic List](#).

Name	Station Id	Actions
Testing test	902	Edit Delete
Aaaaa	902	Edit Delete
Best	902	Edit Delete
Chance	902	Edit Delete

Figure 3: Clinic List Management.

VSE for Clinical Staff

Create Clinic List

Select Facility
Choose a Facility

Clinic List Name
Enter Name

Default Clinic List

Add Clinics

Search... Search...

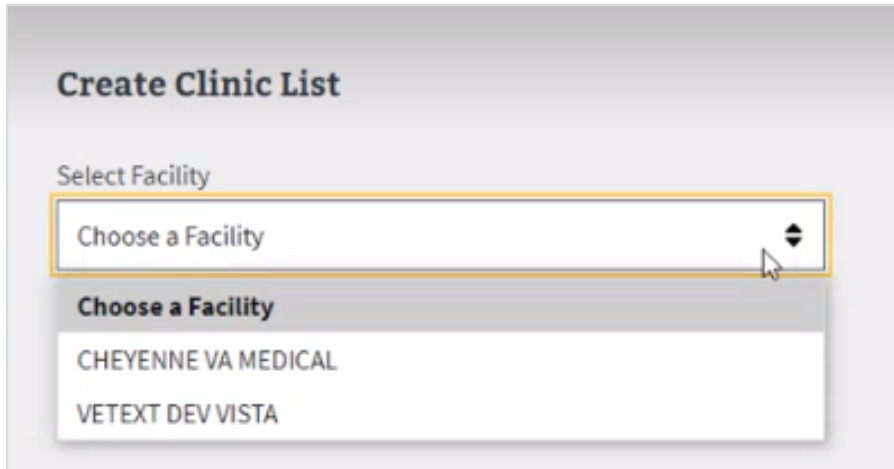
>> > < <<

Create Back to List

Figure 4: Create A Clinic List.

3. On the Create Clinic List Page:

- a. From the top, click on the Select Facility drop-down menu to choose a facility. The clinics under that facility will be populated inside the Add Clinics multi-text box on the bottom left corner.



Create Clinic List

Select Facility

Choose a Facility

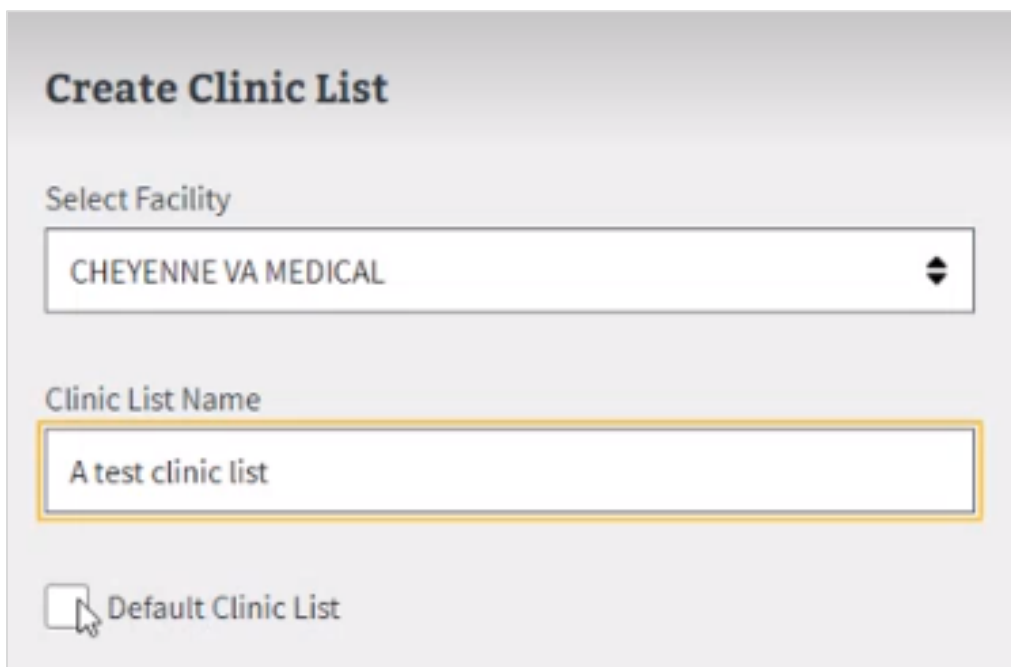
Choose a Facility

CHEYENNE VA MEDICAL

VETEXT DEV VISTA

Figure 5: Create Clinic List: Choosing A Facility.

- b. Enter a name for your Clinic List. If this is your first time creating a Clinic List, it will automatically become the default Clinic List. Select the Default Clinic List check box to set the new Clinic List as your default Clinic List. Note: There can only be one Default Clinic List.



Create Clinic List

Select Facility

CHEYENNE VA MEDICAL

Clinic List Name

A test clinic list

Default Clinic List

Figure 6: Create Clinic List: Setting A Clinic List As Default.

- c. Type in the search bar to narrow down the Clinic List as shown below.

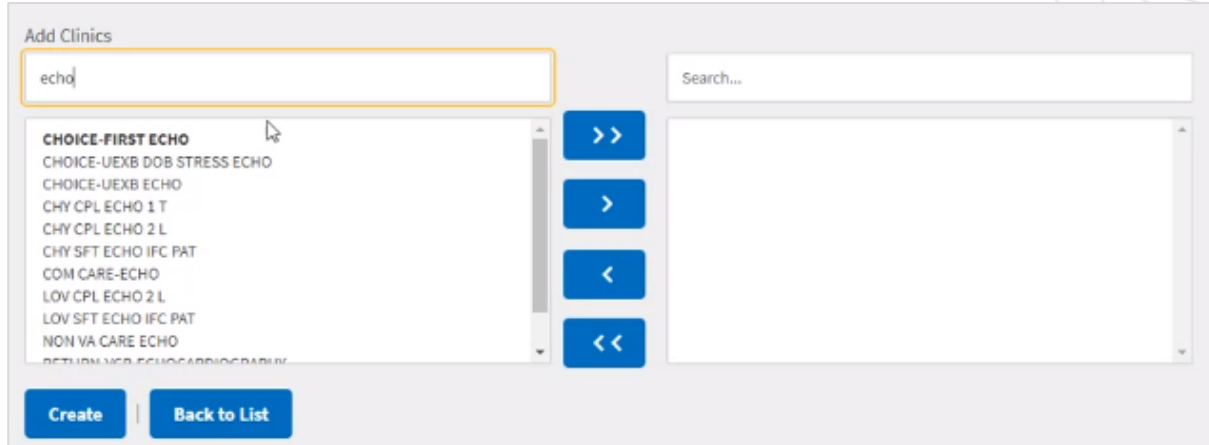


Figure 7: Create Clinic List: Searching For Clinics.

- d. The final step before creating the list is to add the clinics to your list. Select the list of clinics from left side and use the buttons to move the selection or everything across to the right. You can only add up to 50 clinics to your new list. Finally, click on the Create button to create the new Clinic List.

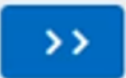


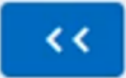
Button	Description
	Adds all the clinics on the left to the right side of the Clinic List.
	Adds selected clinics on the left to the right side of the Clinic List.
	Removes selected clinics from the right side of the Clinic List to the left.
	Removes all clinics from the right side of the Clinic List to the left.

Figure 8: Create Clinic List Actions.

Create Clinic List

Select Facility
CHEYENNE VA MEDICAL

Clinic List Name
A test clinic list

Default Clinic List

Add Clinics

echo

Search...

CHOICE-FIRST ECHO
CHOICE-UEXB DOB STRESS ECHO
CHOICE-UEXB ECHO
CHY CPL ECHO 1 T
CHY CPL ECHO 2 L
CHY SFT ECHO IFC PAT
COM CARE-ECHO
LOV CPL ECHO 2 L
LOV SFT ECHO IFC PAT
NON VA CARE ECHO
RETURN UEXB ECHOCARDIOGRAM

Create Back to List

Figure 9: Create Clinic List: Adding Clinics To The New Clinic List.

5.1.2 Edit/Delete Personal Clinic List

Once a Clinic List has been created, it can be edited by adding or removing clinics from the List.

To edit a personal Clinic List:

1. Navigate to the Clinic List Management Page to see a list of personal Clinic Lists.

Name	Station Id	Actions
OCTO-CHY16-Clerk	442	Edit Delete
123	442	Edit Delete
123 test test test	442	Edit Delete
A test clinic list	442	Edit Delete
Aaa	442	Edit Delete
Acute Care List 123	442	Edit Delete
BJ CHY0016 TEST 3	442	Edit Delete

Figure 10: Clinic List Management Page.

2. Click the Edit button of the personal Clinic List you want to edit to display the Edit Clinic List Page. After making the changes, click the Save List button to save the changes to the personal Clinic List. Click the Back to List button to exit the Edit Clinic Page without making any changes to the Facility or Clinic Name of the list. **NOTE:** When moving the clinics from the left to the right side of the Clinic List it automatically saves the changes.

Edit Clinic List: Cheyenne VA Medical

Facility
CHY0025

Clinic List Name
Cheyenne VA Medical

Default Clinic List

Search Clinics

Search...

00-DOCUMENTATION-NO WORKLOAD-X
1 SLOT 30 VL
1 SLOT FL10
1 SLOT VL10
1566 AFTERNOON TEST CLINIC
1566 DOCTOR TEST CLINIC
1566 EMERGENCY TEST CLINIC
1566 REGULAR TEST CLINIC
ARC PC TEAM1

Search...

SEL FL30
SEL VL15
SEL VL30

Save List | Back to List

Figure 11: Editing A Clinic List.

- To delete a Clinic List, from the Clinic List Management Page, click the Delete button of a personal Clinic List. The Delete Clinic List Page displays asking if you want to delete the list. Click either the Delete List button or the Back To List button to cancel the action. **NOTE:** Your default personal Clinic List can't be deleted; the Delete button is always disabled for that list.

Delete Clinic List

Do you really want to delete the clinic list: test 2 !ff#\$\$?

Delete List | Back To List

Figure 12: Delete A Clinic List.

5.1.3 Validating User Access To VistA Instances

VSECS will validate a user’s clinic list access upon app load. Clinics that the user no longer has access to will be removed from the drop-down on the Daily Appointment List and Daily Workflow List. Additionally, the clinics the user no longer has access to will only be able to be deleted within the Clinic List Management page to indicate the user no longer has access to that clinic as shown below.

VSE for Clinical Staff

Clinic List Management

Clinics Lists

Create New Clinic List

Name	Station Id	Actions
Cheyenne VA Medical	902	ⓘ Edit Delete
<small>You do not have access to the Vista instance that this list is associated with. If you believe this is in error, contact your local Vista administrator</small>		
Test	902	ⓘ Edit Delete

Figure 13: Example Of A User With No Access To The Clinic List.

5.2 Daily Appointment List

Once the clinic list is created, it will show up in the Daily Appointment List for the clinical staff to view and track.

5.2.1 Sorting

The Daily Appointment List displays all the appointments for that day for all the clinics you have under the Clinic List. It tracks patient attributes like Current Check-In Step, Pre-Check-In status, E-Check-In status, Demographics, and Insurance indicators.

Use the drop-down button to select a different Clinic List to see the clinics and appointments under those clinics. The up and down arrows next to the column headers allow you to sort based on the type of column.

Note: The insurance column on the Daily Appointment List will not show for MANILA-RO Station ID 358.

Appt Time, Check-In Time, Clinic, Patient, Current Check-In Steps, Pre-Check-In, and eCheck-In Sort Buttons

Flag Legend Button

Refresh Appointment List Button

Print Button

Appt Time	Check-In Time	Clinic	Patient	DOB	Current Check-In Step	Pre-Check-In	eCheck-In	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
10:00	✗ Not Checked in	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[f] [b] [c]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
09:30	✗ Not Checked in	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
09:00	✗ Not Checked in	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]

Figure 14: The Sorting Buttons Available On The Daily Appointment List.

5.2.2 Filtering

Filtering is enabled in the Daily Appointment List for the Check-In Time, Patient, Current Check-In Step, Pre-Check-In Step, eCheck-In, Demographics, and Insurance columns. Columns with four or more filters allow users to select or deselect filter options when needed.

Check-in Time, Patient, Current Check-In Step, Pre-Check-In, eCheck-In, Demographics, and Insurance Filter Buttons

Select Checked In Filters

- Not Checked-in
- Checked-in
- Checked-Out

Appt Time	Check-In Time	Clinic	Patient	DOB	Current Check-In Step	Pre-Check-In	eCheck-In	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
10:00	✗ Not Checked in	CHY ACUTE CARE 1	TEST,CHU				✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[f] [b] [c]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEA				✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEA				✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
09:30	✗ Not Checked in	SEL FL30	SEL_FLAGS				✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
09:00	✗ Not Checked in	SEL VL15	SEL_MED P				✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
14:00	✗ Not Checked in	SEL VL30	SEL_PATIE				✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]
08:00	✗ Not Checked in	SEL FL30	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[f] [b] [c]

Figure 15: The Filtering Buttons Available On The Daily Appointment List.

5.2.2.1 Check-In Time Filtering

By clicking on the Check-In Time filter button on the right side of the column, users can filter by Not Checked-In, Checked-In, and Checked Out in the Daily Appointment List.

Daily Appointment List

Select Clinic List: CHY0025

3 checked in of 17 | 1 eCheck-ins | 2 Pre-Check-ins

Appointment data is no older than: Dec 29 2023 1:14:00 PM

Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-ins	eCheck-ins	Demographics	Insurance	Actions
08:00	✓ Checked In at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[i] [d]
11:00	✓ Checked In at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEA	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
13:00	✓ Checked In at 12:59	CHY ACUTE CARE 1	TEST,CLEA	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
09:00	✗ Not Checked In	SEL VL15	SEL_MED P	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
14:00	✗ Not Checked In	SEL VL30	SEL_PATIE				✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
08:00	✗ Not Checked In	SEL FL30	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]

Figure 16: Check-In Time Column With Pop-Up Showing Filtering Options On The Daily Appointment List.

5.2.2.2 Filtering In Patient Column

The Patient column of the Daily Appointment List allows users to filter by searching a patient's name.

Daily Appointment List

Select Clinic List: CHY0025

3 checked in of 17 | 1 eCheck-ins | 2 Pre-Check-ins

Appointment data is no older than: Dec 29 2023 1:14:00 PM

Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-ins	eCheck-ins	Demographics	Insurance	Actions
08:00	✓ Checked In at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[i] [d]
11:00	✓ Checked In at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
13:00	✓ Checked In at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]
09:00	✗ Not Checked In	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [d]

Figure 17: Patient Column With Filter Button Highlighted On The Daily Appointment List.

5.2.2.3 Filtering of Current Check-In Step Column

The Current Check-In Step column of the Daily Appointment List allows users to filter patients by their check in step.



Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-in	eCheck-in	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[Filter] [Refresh]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:00	✗ Not Checked In	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]

Figure 18: Current Check-In Step Column With Filter Button On Daily Appointment List.

5.2.2.4 Pre-Check-In Filter

The Pre-Check-In column of the Daily Appointment List includes a filter to allow users to filter patients by their pre-check-in status.

Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-in	eCheck-in	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[Filter] [Refresh]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:00	✗ Not Checked In	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]

Figure 19: Pre-Check-In filter button On The Daily Appointment List.

5.2.2.5 eCheck-In Filter

The eCheck-In column of the Daily Appointment List also includes a filter to allow users to filter patients by their echeck-in status.



VSE for Clinical Staff

Daily Appointment List

Select Clinic List: CHY0025

3 checked in of 17 | 1 eCheck-ins | 2 Pre-Check-ins

Appointment data is no older than: Dec 29 2023 1:14:00 PM

Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-in	eCheck-in	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[Filter] [Refresh]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:00	✗ Not Checked In	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]

Figure 20: eCheck-In Filter Button On The Daily Appointment List.

5.2.2.6 Demographics Filter

The Demographics column of the Daily Appointment List allows users to filter patients by demographics.

VSE for Clinical Staff

Daily Appointment List

Select Clinic List: CHY0025

3 checked in of 17 | 1 eCheck-ins | 2 Pre-Check-ins

Appointment data is no older than: Dec 29 2023 1:14:00 PM

Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-in	eCheck-in	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[Filter] [Refresh]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:00	✗ Not Checked In	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]

Figure 21: Demographics Filter Button On The Daily Appointment List.

5.2.2.7 Insurance Filter

The Insurance column of the Daily Appointment List allows users to filter patients' insurance status.



Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-ins	eCheck-ins	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[Filter] [Refresh]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:00	✗ Not Checked In	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]

Figure 22: Insurance Filter Button On The Daily Appointment List.

5.2.3 Flag Legend Button

A Flag Legend button will be displayed on Appointments in the Daily Appointment List. The information shown when clicking on that button is explained in the [Fugitive Felon, National/Local, and Restricted Record Flags section](#) of this document.

Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-ins	eCheck-ins	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[Filter] [Refresh]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]
09:00	✗ Not Checked In	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Filter] [Refresh]

Figure 23: Flag Legend Button On The Daily Appointment List Page.

5.2.4 Refresh Button

A Refresh Appointment List Button is included on the Daily Appointment List as a convenience for the users. Clicking that button engages the page to refresh.



Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-in	eCheck-in	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[Print] [Refresh]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
09:00	✗ Not Checked In	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]

Figure 24: Refresh Appointment List Button On The Daily Appointment List Page.

5.2.5 Printing The Daily Appointment List

To print your Daily Appointment List, click the Print button on the right corner of the Daily Appointment List table and you will be able to save the Daily Appointment List in PDF format.

Pre-Check-in	eCheck-in	Demographics	Insurance	Actions
✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[Print] [Refresh]
✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
✓ PRE-CHECK-IN COMPLETE	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]
✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[Print] [Refresh]

Figure 25: Printing The Daily Appointment List In PDF Format.



AppointmentList.pdf

Daily Appointment List

No Date Than: Aug 18 2022 4:15:09 PM

Appt Time	Check-In	Clinic	Patient	DOB	Current Check-In Step	Pre-Check-In	eCheck-In	Demographics	Insurance
08:00	Not Checked In	DEMO ONE	DEMO.TWO	1962-04-26	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification
08:30	Not Checked In	DEMO ONE	DEMO.ONE	1978-07-29	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification
10:30	Not Checked In	DEMO ONE	DEMO.ONE	1978-07-29	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification
11:00	Not Checked In	DEMO ONE	VSE,BEHAVIORAL	1966-07-21	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification
13:00	Not Checked In	DEMO ONE	DEMO.TWO	1962-04-26	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification
13:30	Not Checked In	DEMO ONE	VSE,FUGITIVE FELON	1967-08-10	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification
14:00	Not Checked In	DEMO ONE	VSE,TWO	1982-01-01	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification
15:30	Not Checked In	DEMO ONE	DEMO.TWO	1962-04-26	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification
08:00	Not Checked In	DEMO TWO	DEMO.ONE	1978-07-29	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification
09:30	Not Checked In	DEMO TWO	DEMO.TWO	1962-04-26	No Check-In Steps Started	PRE-CHECK-IN NOT STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification

Page 1 of 3

Figure 26: Printed PDF Format Of The Daily Appointment List.

5.2.6 Check In And Check Out Status Logic

The Daily Appointment List will show if an appointment has been checked in and if an appointment has been fully checked out. Appointments that were checked in and checked out will display both statuses and times.

VSE for Clinical Staff

Daily Appointment List

Select Clinic List: CHY0025

3 checked in of 17 | 1 eCheck-ins | 2 Pre-Check-ins

Appointment data is no older than: Dec 29 2023 11:14:00 PM

Appt Time	Check-In Time	Clinic	Patient	DOB	Current Check-In Steps	Pre-Check-ins	eCheck-ins	Demographics	Insurance	Actions
08:00	✓ Checked In at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b]
10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[i] [b]
11:00	✓ Checked In at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b]
13:00	✓ Checked In at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b]
09:30	✗ Not Checked In	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b]
09:00	✗ Not Checked In	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b]

Figure 27: Daily Appointment List With The New Check In And Check Out Logic.

10:00	✗ Not Checked In	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[i] [b]
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Figure 28: Not Checked In.



13:00	✓ Checked In at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	% B
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Figure 29: Checked In But Not Checked Out.

13:00	✓ Checked In at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	% B
-------	-----------------------	------------------	--------------	------------	---------------------------	----------------------------	--------------------------	----------------	----------------------	-----

Figure 30: Checked Out With Act Req.

08:00	✓ Checked In at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	% B
-------	---	------------------	--------------	------------	---------------------------	----------------------------	--------------------------	----------------	----------------------	-----

Figure 31: Completely Checked Out.

13:00	✓ Checked In ✗ Checked Out at 14:12	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-In Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	% B
-------	--	------------------	--------------	------------	---------------------------	----------------------------	--------------------------	----------------	----------------------	-----

Figure 32: Completely Checked Out But Never Checked In.

5.3 Daily Workflow List

The Daily Workflow List Page shows a patient’s current workflow status and allows users to track and change the status of the workflow.

5.3.1 Sorting

Appointments can be sorted based on Patient Name, Clinic, Appointment Time, Check-In Time, and Workflow Status. Sorting is done by simply clicking the up and down arrows.

Daily Workflow List

Select Clinic List:

0 checked in of 23 | 0 eCheck-Ins | 0 Pre-Check-Ins

Workflow list data no older than: Aug 19 2022 11:37:00 AM

Patient	DOB	Clinic	Appointment time	Check-In Time	Workflow Status	Memo	Actions
SEL_PATIENT ONE	1956-06-20	SEL FL30	08:00	✗ Not Checked In	Select New Workflow Step		% B
DEMO,ONE	1978-07-29	DEMO TWO	08:00	✗ Not Checked In	Needs Clerk		% B
DEMO,TWO	1962-04-26	DEMO ONE	08:00	✗ Not Checked In	Select New Workflow Step		% B
SEL_TWO INPATIENT	1952-08-27	SEL FL30	08:30	✗ Not Checked In	Select New Workflow Step		% B
DEMO,ONE	1978-07-29	DEMO ONE	08:30	✗ Not Checked In	Select New Workflow Step		% B

Figure 33: Sorting A Daily Workflow List.

5.3.2 Filtering

Filtering is enabled in the Daily Workflow List on the Patient, Check-In Time, and Workflow Status columns. Columns with four or more filters allow users to select or deselect filter options when needed.

Daily Workflow List

Select Clinic List:

0 checked in of 23 | 0 eCheck-Ins | 0 Pre-Check-Ins

Workflow list data no older than: Aug 19 2022 11:37:00 AM

Patient	DOB	Clinic	Appointment time	Check-In Time	Workflow Status	Memo	Actions
SEL_PATIENT ONE	1956-06-20	SEL FL30	08:00	✗ Not Checked In	Select New Workflow Step		% B
DEMO,ONE	1978-07-29	DEMO TWO	08:00	✗ Not Checked In	Needs Clerk		% B
DEMO,TWO	1962-04-26	DEMO ONE	08:00	✗ Not Checked In	Select New Workflow Step		% B
SEL_TWO INPATIENT	1952-08-27	SEL FL30	08:30	✗ Not Checked In	Select New Workflow Step		% B
DEMO,ONE	1978-07-29	DEMO ONE	08:30	✗ Not Checked In	Select New Workflow Step		% B

Figure 34: Filtering A Daily Workflow List.

5.3.2.1 Filtering In Patient Column

The Patient column of the Daily Workflow List allows users to filter by searching a patient's name.



Patient	DOB	Clinic	Appointment time	Check-In Time	Workflow Status	Memo	Actions
TEST,CLEANUP	1960-09-20	CHY ACUTE CARE 1	15:00	✓Checked In at 15:00	Select New Workflow Step	+	% D B
DEMO,PI ONE	1961-10-05	CHY ACUTE CARE 1	10:00	✓Checked In at 10:00	Select New Workflow Step	+	% D B
TEST,CLEANUP	1960-09-20	CHY ACUTE CARE 1	08:00	✓Checked In at 08:00 ✗Checked Out at 10:15	Select New Workflow Step	+	% D B
SEL_SEN MED INPATIENT	1952-08-27	SEL VL30	11:01	✗Not Checked In	Select New Workflow Step	+	% D B M
SEL_PATIENT TWO	1982-02-27	SEL VL30	14:00	✗Not Checked In	Select New Workflow Step	+	% D B
SEL_MED PATIENT	1956-06-20	SEL VL15	09:00	✗Not Checked In	Select New Workflow Step	+	% D B M
SEL_ONE INPATIENT	1968-12-04	SEL VL15	11:00	✗Not Checked In	Select New Workflow Step	+	% D B
SEL_SEN MED INPATIENT	1952-08-27	SEL VL15	13:00	✗Not Checked In	Select New Workflow Step	+	% D B

Figure 35: Patient Column With Filter Button Highlighted On The Daily Workflow List.

5.3.2.2 Check-In Time Filter

The Check-In Time column of the Daily Workflow List allows users to filter by clicking on the button on the right in that column. A pop-up box will display to let users filter by Not Checked-In, Checked-In, and Checked-Out.

Patient	DOB	Clinic	Appointment time	Check-In Time	Workflow Status	Memo	Actions
SEL_SEN MED INPATIENT	1952-08-27	SEL VL30	11:01	✗Not Checked In	Select New Workflow Step	+	% D B M
SEL_PATIENT TWO	1982-02-27	SEL VL30	14:00	✗Not Checked In	Needs Clerk	+	% D B
SEL_MED PATIENT	1956-06-20	SEL VL15	09:00	✗Not Checked In	Select New Workflow Step	+	% D B
SEL_ONE INPATIENT	1968-12-04	SEL VL15	11:00	✗Not Checked In	Select New Workflow Step	+	% D B
SEL_SEN MED INPATIENT	1952-08-27	SEL VL15	13:00	✗Not Checked In	Select New Workflow Step	+	% D B
SEL_PATIENT TWO	1982-02-27	SEL VL15	15:00	✗Not Checked In	Select New Workflow Step	+	% D B

Figure 36: Check-In Time Filter Engaged Showing A Pop-Up Box On A Daily Workflow List.

5.3.2.3 Workflow Status Filter

Records can be filtered based on the current workflow status. Click the Workflow Status Filter button on the right side of the Workflow Status column to display the workflow Filter modal window. From the modal window, users can filter their work list by workflow status by selecting the check boxes next to the workflow statuses.



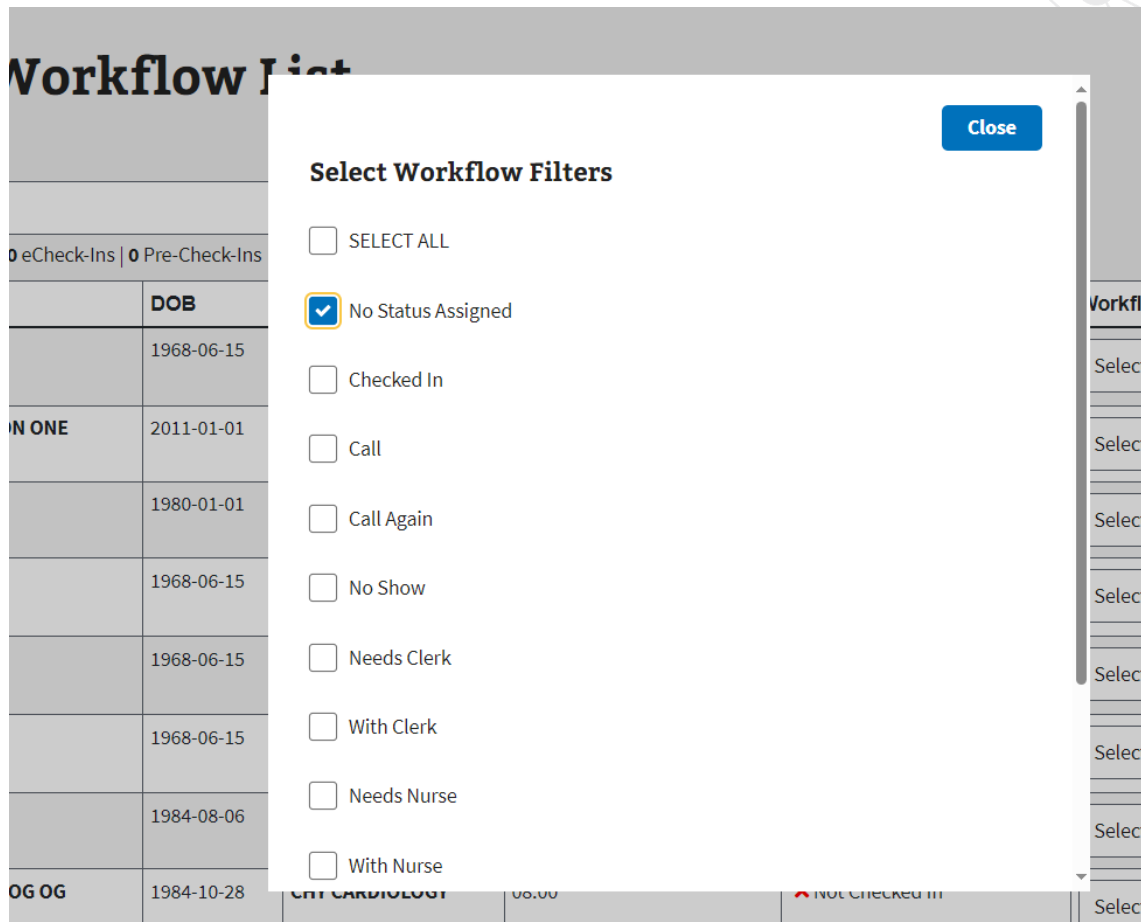


Figure 37: Image Displaying Choices To Filter On Workflow Statuses.

5.3.2.4 Enable Select/Deselect All Functions For Filters With Over Three Options

A Select All option has been added to column filters that have more than three filter options to choose from.

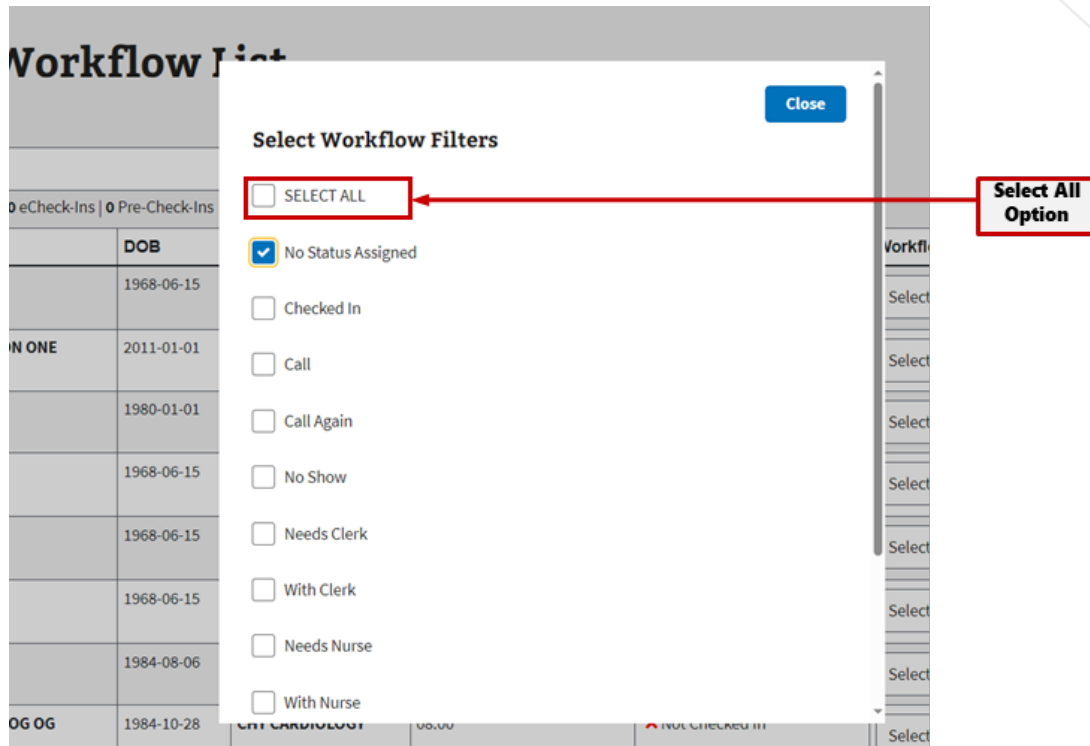


Figure 38: Image Displaying The Select All Option Under Select Workflow Filters.

5.3.3 Flag Legend Button

A Flag Legend button will be displayed on Appointments in the Daily Workflow List. Information shown when clicking on that button is explained in the [Fugitive Felon, National/Local, and Restricted Record Flags section](#) of this document.

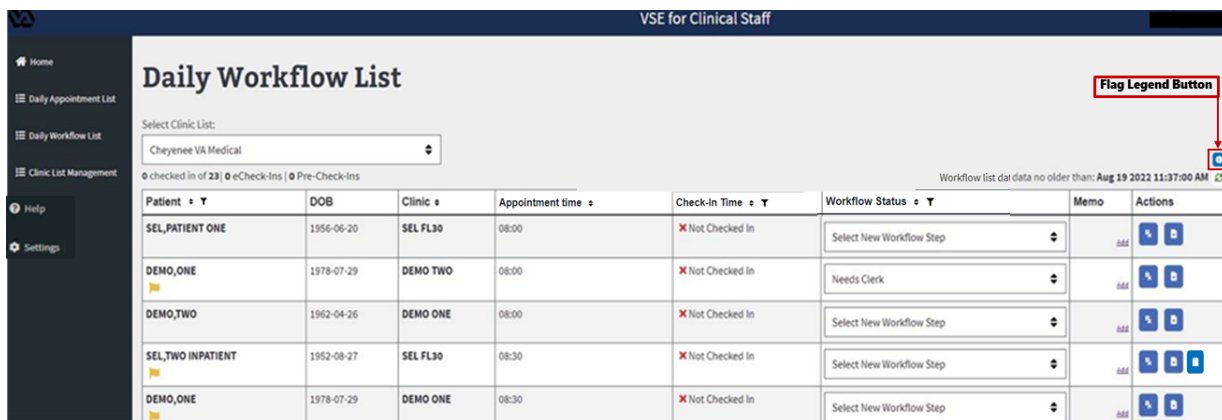


Figure 39: Flag Legend Button On The Daily Workflow List.

5.3.4 Refresh Button

A Refresh Appointment List Button is included on the Daily Workflow List as a convenience for the users. Clicking that button engages the page to refresh.

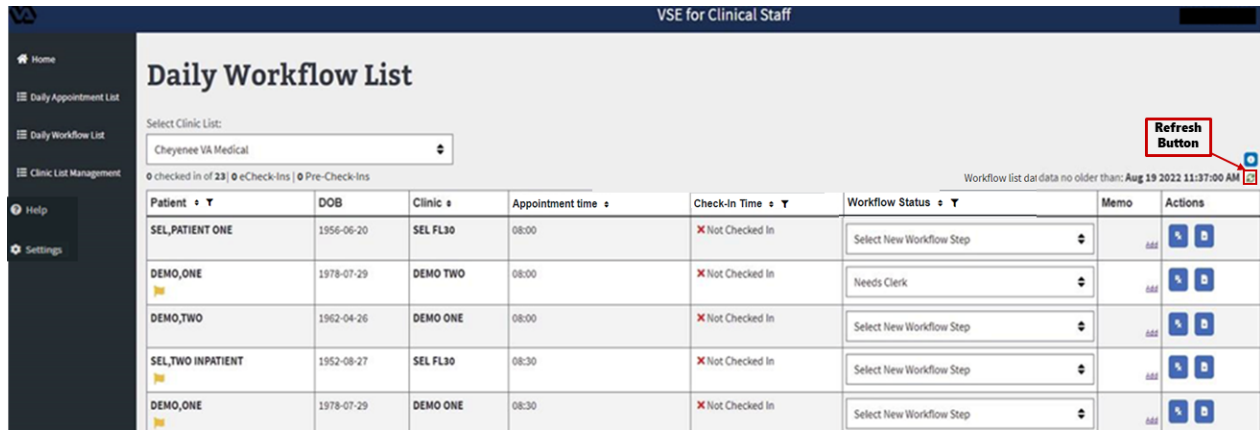


Figure 40: Refresh Button On The Daily Workflow List.

5.3.5 Change A Workflow Status

To change a patient’s workflow status, from the Workflow Status column, click the drop-down arrow and select the new step. A pop-up page displays asking to confirm the changes. Click Accept and the workflow status will be updated.

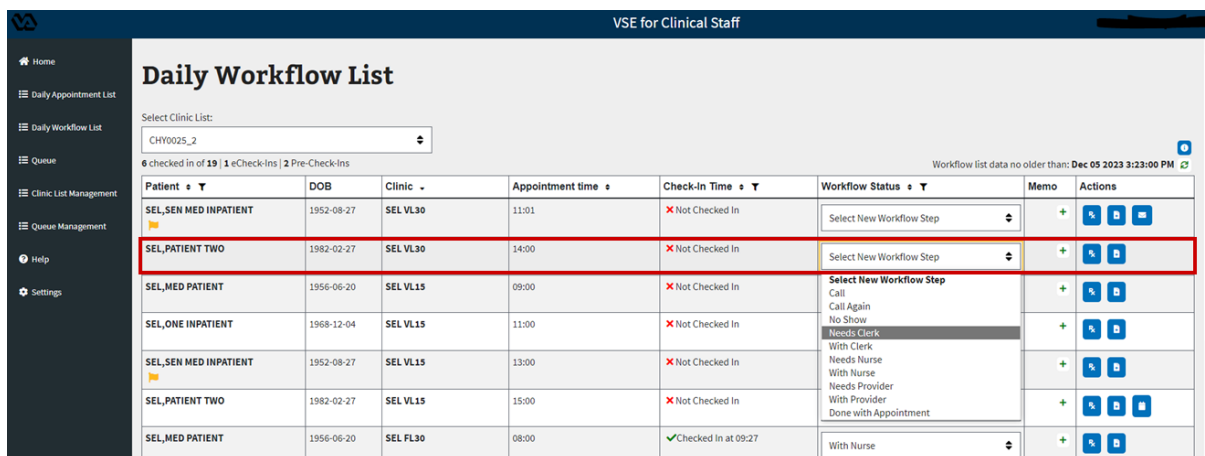


Figure 41: Daily Workflow List – Select New Workflow Step.



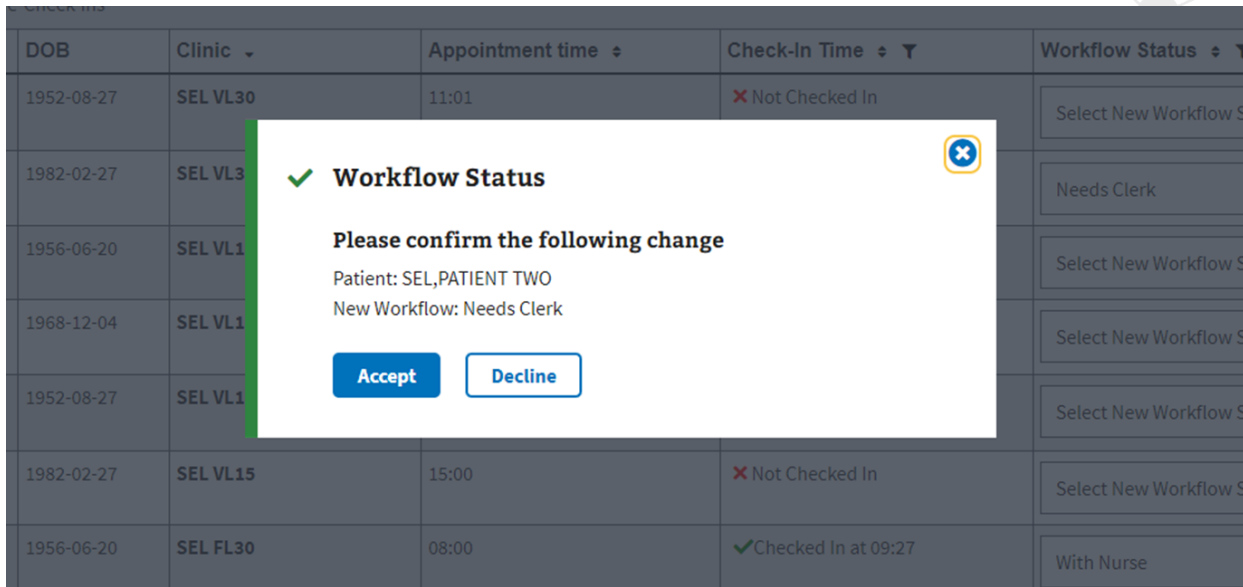


Figure 42: Confirming A Workflow Status Change To “Needs Clerk.”

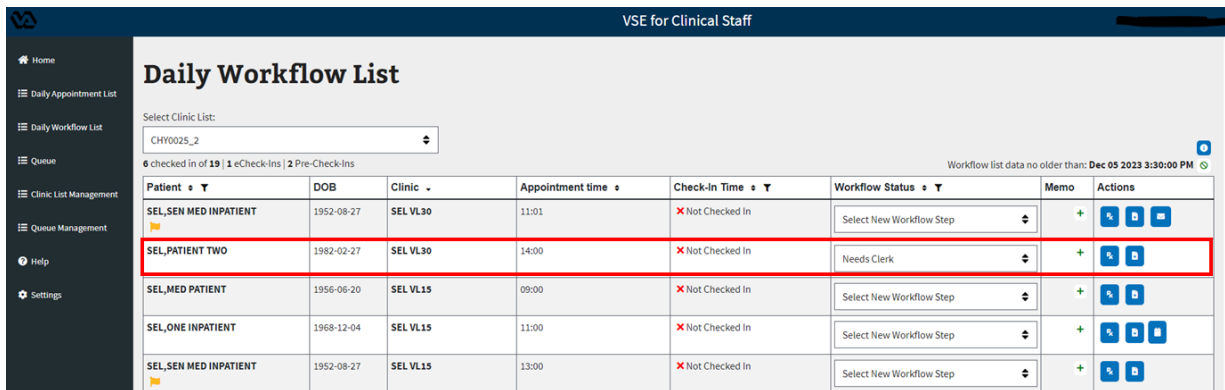


Figure 43: Daily Workflow List – New Workflow Status “Needs Clerk.”

5.3.6 Alert Notifications

Whenever a change to the Daily Workflow List occurs, an alert notification will be displayed on the taskbar. Even if the VSECS application is in the background, the alert notification still pops up on the taskbar informing the staff of the changes. Changes that trigger an alert include a new appointment in the list or workflow status change.

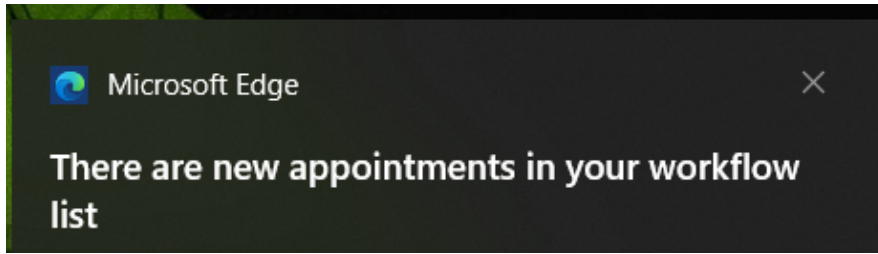


Figure 44: VSECS Alert Notification.

Similarly, if anything changes on the Daily Workflow List the affected row will be highlighted.

Patient	DOB	Clinic	Appointment time	Check-in Time	Workflow Status	Memo	Actions
SEL_PATIENT ONE	1956-06-20	SEL FL30	08:00	✗ Not Checked In	Select New Workflow Step		add % B
DEMO_ONE	1978-07-29	DEMO TWO	08:00	✗ Not Checked In	Needs Clerk		add % B
DEMO_TWO	1962-04-26	DEMO ONE	08:00	✗ Not Checked In	Select New Workflow Step		add % B
SEL_TWO INPATIENT	1952-08-27	SEL FL30	08:30	✗ Not Checked In	Select New Workflow Step		add % B
DEMO_ONE	1978-07-29	DEMO ONE	08:30	✗ Not Checked In	Select New Workflow Step		add % B
SEL_PATIENT ONE	1956-06-20	SEL VL15	09:00	✗ Not Checked In	Select New Workflow Step		add % B

Figure 45: Patient On The Second Row Highlighted To Notify There Was A Recent Change To The Record.

5.3.6.1 Disable Notifications For Updated Appointments

The below toggle has been added to the Settings page to let users disable all Windows notifications and alerts for updated appointments.



Figure 46: Disable Window Alert/Notifications On Setting Page.

5.3.7 Memo Column

5.3.7.1 Adding A Memo

Users can add a memo to a specific appointment by selecting “Add” under the Memo column for that appointment.

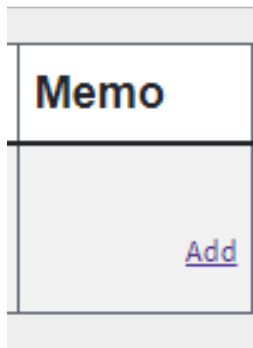


Figure 47: Memo Column.

A pop-up will appear for the Memo to be entered. The user can type in a memo and select “Add Memo.”

Note: There is a 100-character max for memos.

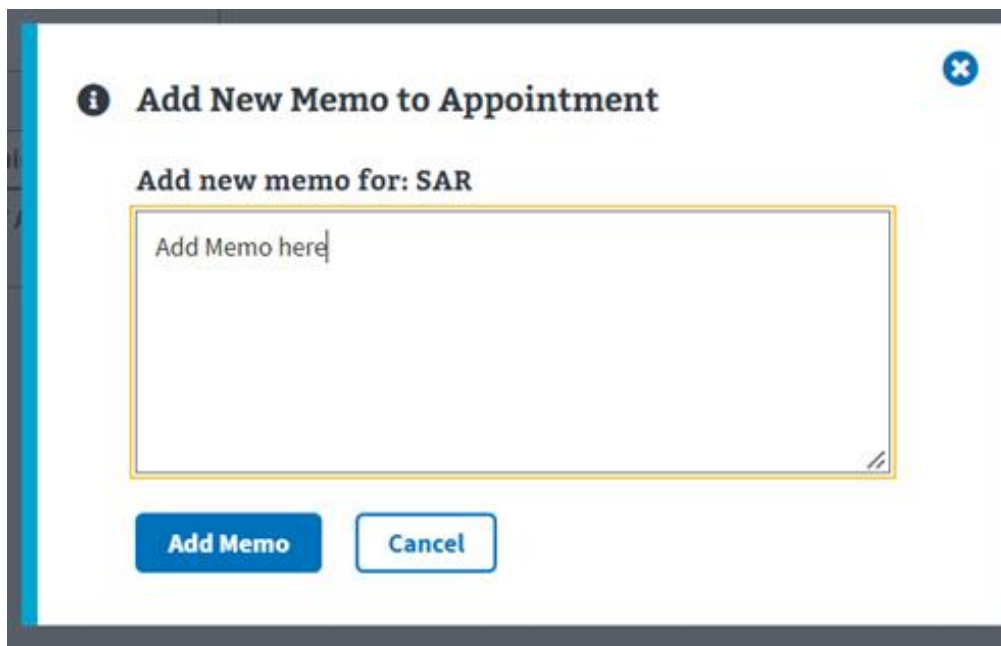


Figure 48: Adding the New Memo To The Appointment.

The Memo will show up in the Memo column of the related appointment with a timestamp and the initials of the user who entered the memo.





Memo	Actions
08:08 JS Add Memo Here Add	 
Add	 

Figure 49: The New Memo Will Show Under The "Memo" Column.

5.3.7.2 Adding Multiple Memos To An Appointment

Multiple memos can be added to the appointment. A user can repeat the process to add an additional memo. When there is more than one memo on an appointment, a new option will appear in the column named "More." Only the most recent memo will show on the Daily Workflow list.





Memo	Actions
08:10 JS This is an additional memo More Add	 
Add	 

Figure 50: Additional Memos Can Be Added By Clicking The "Add" Button.

If a user selects more, a pop-up will appear to show all memos for that appointment.

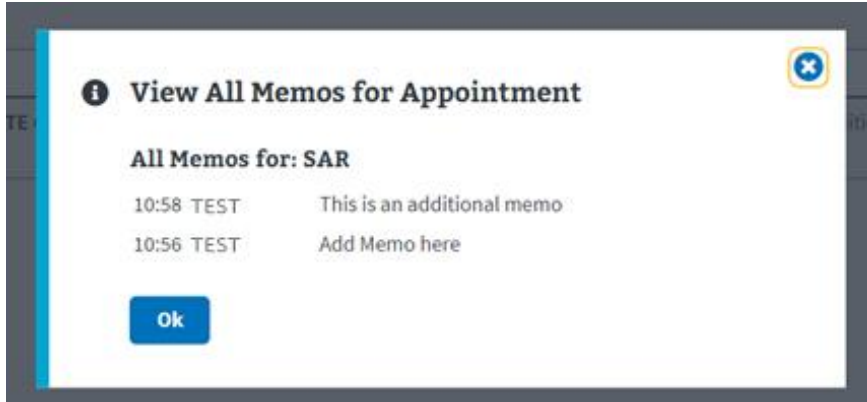


Figure 51: Click The "More" Button Under The Memo Column To View All The Memos For The Appointment.

5.3.8 Check In And Check Out Status Logic

The Daily Workflow List will show if an appointment has been checked in and if an appointment has been fully checked out. Appointments that were checked in and checked out will display both statuses and times.

Patient	DOB	Clinic	Appointment time	Check-In Time	Workflow Status	Memo	Actions
TEST,CLEANUP	1960-09-20	CHY ACUTE CARE 1	15:00	✓Checked In at 15:00	Select New Workflow Step	+	% B
DEMO,PI ONE	1961-10-05	CHY ACUTE CARE 1	10:00	✓Checked In at 10:00	Select New Workflow Step	+	% B
TEST,CLEANUP	1960-09-20	CHY ACUTE CARE 1	08:00	✓Checked In at 08:00 ✗Checked Out at 10:15	Select New Workflow Step	+	% B
SEL_SEN MED INPATIENT	1952-08-27	SEL VL30	11:01	✗Not Checked In	Select New Workflow Step	+	% B M
SEL_PATIENT TWO	1982-02-27	SEL VL30	14:00	✗Not Checked In	Select New Workflow Step	+	% B
SEL_MED PATIENT	1956-06-20	SEL VL15	09:00	✗Not Checked In	Select New Workflow Step	+	% B
SEL_ONE INPATIENT	1968-12-04	SEL VL15	11:00	✗Not Checked In	Select New Workflow Step	+	% B
SEL_SEN MED INPATIENT	1952-08-27	SEL VL15	13:00	✗Not Checked In	Select New Workflow Step	+	% B

Figure 52: Daily Workflow List With The New Check In And Check Out Logic.

5.4 Queues

VSE for Clinical Staff Queuing functionality allows users to add Veterans to a queue regardless of whether they are in the VA system and where they do not have an appointment, so they can request services based on their arrival time.

5.4.1 Queue Management

Users that have SD SUPERVISOR Key assigned to them will have the Queue Management tab within VSECS. Select Queue Management to create a queue.

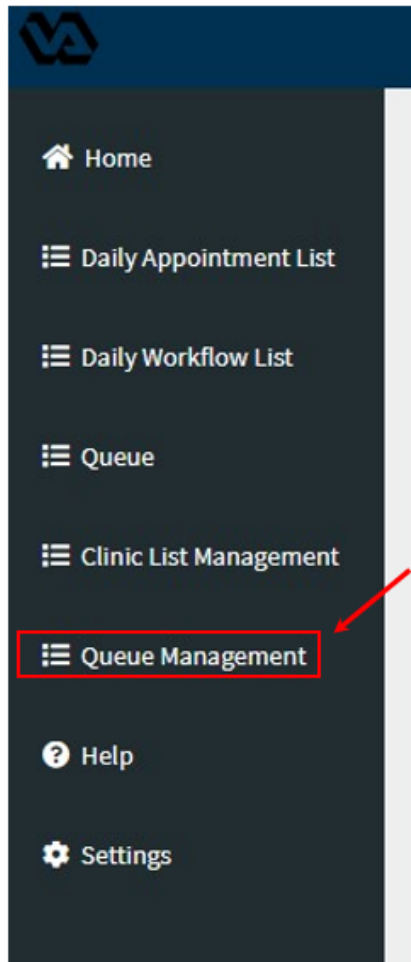


Figure 53: Queue Management Tab.

From the Queue Management page, a user with SD SUPERVISOR Key can create queues, or view, edit, and delete existing queues.

Queue Management

Queues

Create New Queue

Station Id	Name	Actions
983	Chyshr Test Queue	Edit Delete
983	LOUISVILLE TEST 123	Edit Delete

Figure 54: Queue Management Page.

5.4.1.1 Creating Queues

- Select “Create New Queue” on the Queue Management page.
- From the drop-down, select the applicable facility.
- Type in a name for the queue.
- Select “Create.”

Note: Queue names must be greater than 3 characters, but less than 50.

Home

Daily Appointment List

Daily Workflow List

Queue

Clinic List Management

Queue Management

Help

Settings

Create Queue

Select Facility

Choose a Facility

Queue Name

Enter Name

Create | Back to List

Figure 55: Create Queue Page.

Note: Users will be unable to create a duplicate queue from the Queue Management tab. If a user attempts to create a Queue with the same name as another they will see the below message.

The screenshot shows a 'Create Queue' form with the following elements:

- Select Facility:** A dropdown menu with 'CHY0025 (902)' selected.
- Queue Name:** A text input field containing 'Test'.
- Error Message:** A red-bordered box containing the text: "A queue with this name already exists or has existed in the last 30 days".
- Buttons:** 'Create' and 'Back to List' buttons.

Figure 56: Unable To Create A Duplicate Message.

5.4.1.2 Editing Queues

- Select "Edit" under the Actions column of the queue.

The screenshot shows the 'Queue Management' interface with a table of queues. The table has three columns: Station Id, Name, and Actions. There are five rows of data, each with an 'Edit' and 'Delete' button in the Actions column.

Station Id	Name	Actions
983	Chyshr Test Queue	Edit Delete
983	LOUISVILLE TEST 123	Edit Delete
983	Lexington 123	Edit Delete
983	123TEST	Edit Delete
983	123TEST_123	Edit Delete

Figure 57: Editing Queue Management.

- Update the Queue Name as desired.
- Select “Update.”

Update Queue

Facility
Site #902

Queue Name
CHY0025

Update | **Back to List**

Figure 58: Update Queue Page.

5.4.1.3 Deleting Queues

- Select “Delete” under the Actions column of the queue.

Queue Management

Queues

Create New Queue

Station Id	Name	Actions
983	Chyshr Test Queue	Edit Delete
983	LOUISVILLE TEST 123	Edit Delete
983	Lexington 123	Edit Delete
983	123TEST	Edit Delete
983	123TEST_123	Edit Delete

Figure 59: Deleting Queue Management.

- Select “Delete Queue.”

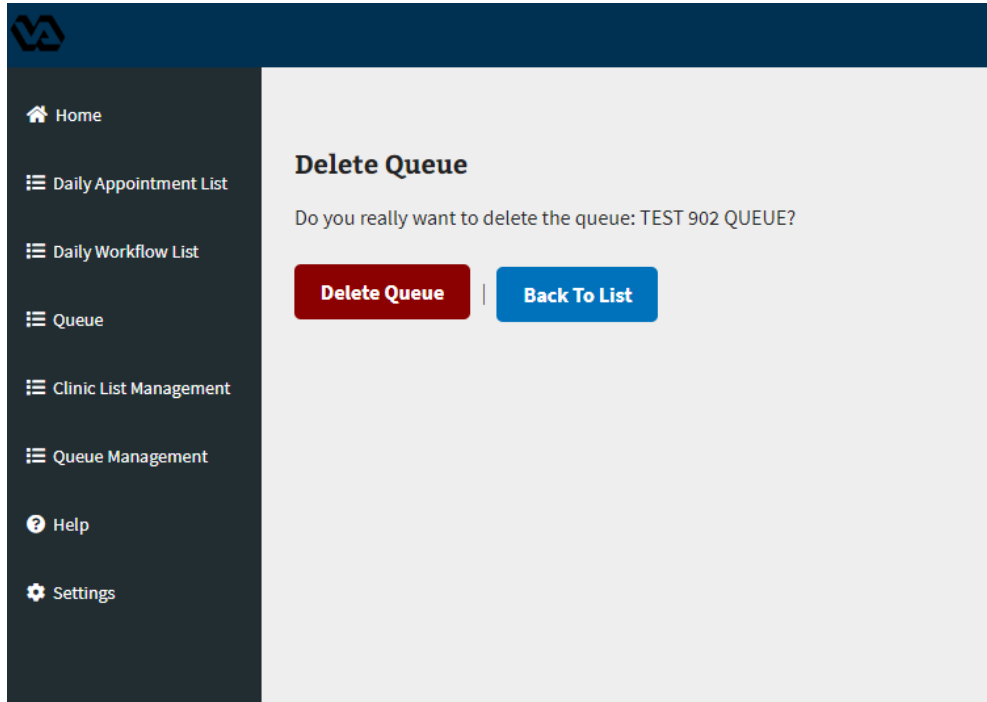


Figure 60: Delete Queue Pop-Up.

Note: A queue can only be deleted if it does not have patients assigned to it, or if the patients that are assigned to the queue are all in a complete status. If a user attempts to delete a queue where these requirements are not met, they will receive the below notice.

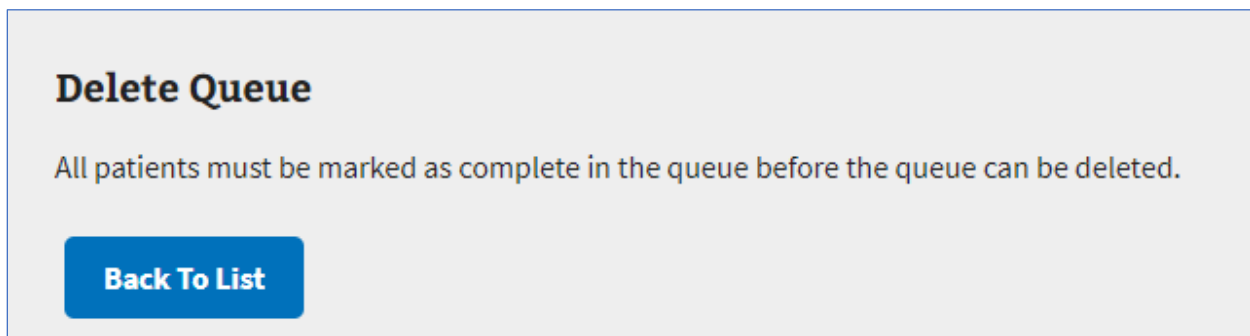


Figure 61: Delete Queue Pop-Up If Requirements Not Met.

5.4.2 Utilizing Queues

All VSECS users have access to the Queue tab.

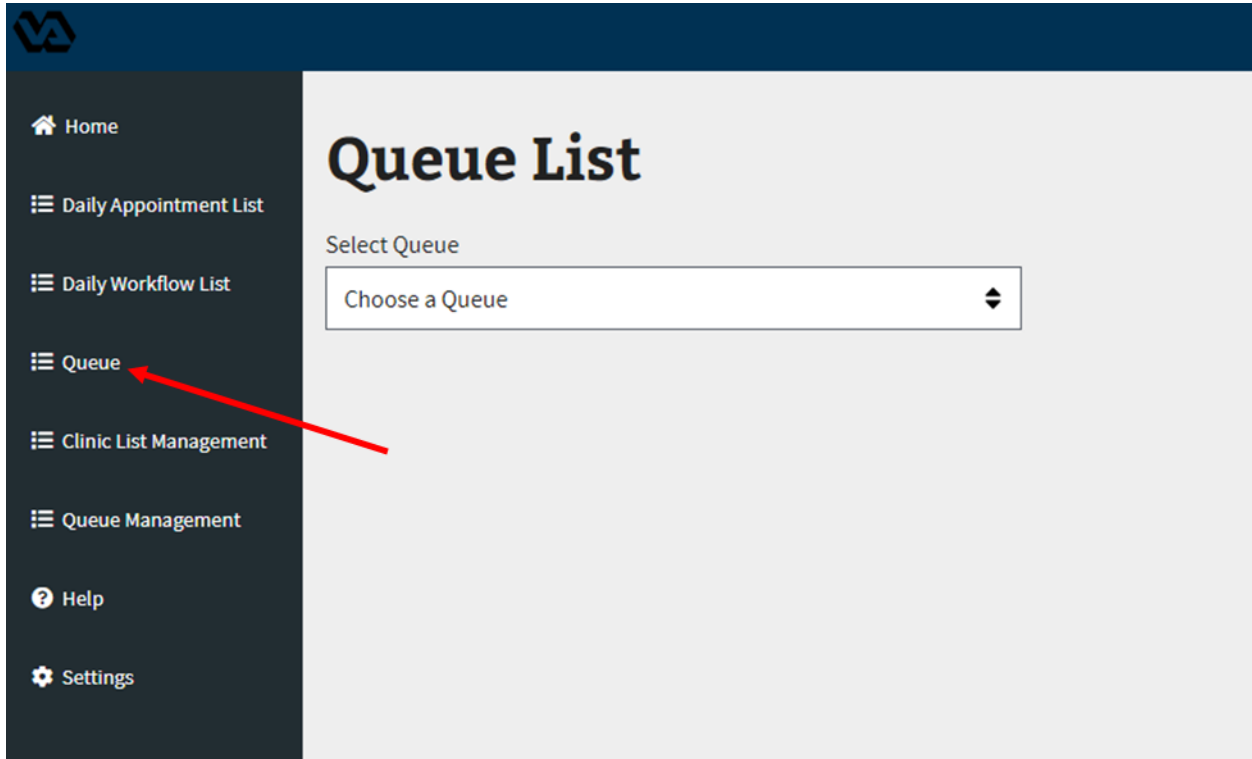


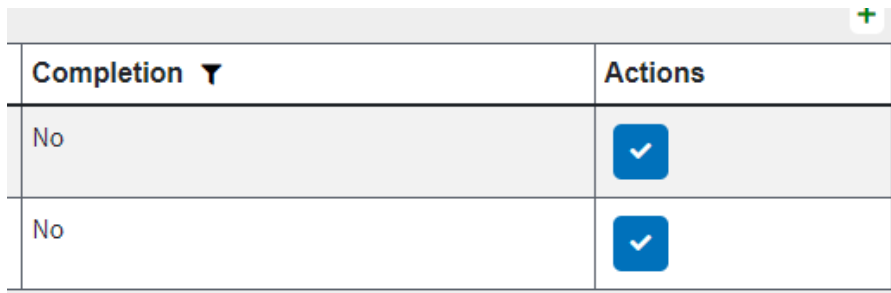
Figure 62: Queue List Page.

- From the Queue tab, select the applicable queue from the drop-down.
- Veterans in that Queue will appear.

Order	Arrival Time	Appointment Type	Patient	Memo	Completion	Actions
1	13:01	Queue	TEST, TEST	13:02 JS This is a test memo Add	No	<input checked="" type="checkbox"/>
2	13:01	Queue	TEST2, TEST	Add	No	<input checked="" type="checkbox"/>
3	13:02	Queue	TEST3, TEST	13:02 JS Multiple Memos Test More Add	No	<input checked="" type="checkbox"/>

Figure 63: Queue List Search Results.

- Users can select the check under Actions to mark the encounter as complete.



Completion ▾	Actions
No	<input checked="" type="checkbox"/>
No	<input checked="" type="checkbox"/>

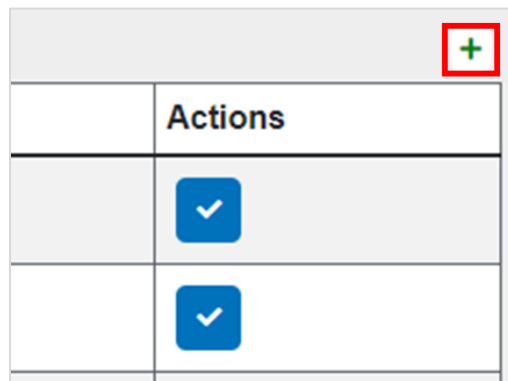
Figure 64: Action Items Check Icon.

- Once selected, the note under “Completion” will say “Yes,” and the check mark will be replaced with an undo button. The undo button is designed to reset the appointment status to not complete.



Completion ▾	Actions
Yes	<input type="button" value="↶"/>
No	<input checked="" type="checkbox"/>

Figure 65: Completion Change.



Actions
<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>

Figure 66: Adding A Veteran to Queue.

- Use the Patient Search to add a Veteran who is already in the VA System.

Note: Users must have SECONDARY MENU OPTIONS: VIAB WEB SERVICES OPTION to utilize patient search.

- For Veterans not in the VA System, users can manually type the Veteran's name to add them to the queue.

Add Patient to Queue

Patient Search

Search:

Name / SSN / Last initial + Last 4 SSN...

Valid Search Criteria

- Last Name (3+ Letters)
- Last Name, (2+ Letters and a comma if the patient's last name only contains 2 letters)
- Last Name,First Name (No space after First Name)
- Last Name, First Name (Space after comma)
- ,First Name (For patients without a last name)
- 9 Digit Social Security Number (no dashes)
- Last initial + Last 4 SSN

Note: Only the first 10 records will be shown

Or Manually Enter Patient

Name:

Manually type patient name

Cancel

Figure 67: Patient Search Lookup.

- If manually entered, select the icon to the right of the text box to add the Veteran to the queue.

Add Patient to Queue

Patient Search

Search:

Name / SSN / Last initial + Last 4 SSN...

Valid Search Criteria

- Last Name (3+ Letters)
- Last Name, (2+ Letters and a comma if the patient's last name only contains 2 letters)
- Last Name, First Name (No space after First Name)
- Last Name, First Name (Space after comma)
- ,First Name (For patients without a last name)
- 9 Digit Social Security Number (no dashes)
- Last initial + Last 4 SSN

Note: Only the first 10 records will be shown

Or Manually Enter Patient

Name:

Manually type patient name

Cancel

Figure 68: Manually Entering.

5.4.3 Queue List Memos

A column for memos has been added to the Queue List page. The memo functionality mirrors the memo functionality that is currently in production on the Daily Workflow List.

Users can select “Add” in the memo column of the patient they need to add a memo. Once selected, the user will be presented with the below pop-up where they can type in the memo.

Add New Memo to Queue

Add new memo for: TEST, TEST

Add a New Memo (100 characters max)

Add Memo Cancel

Figure 69: Add New Memo To Queue Pop-Up.

Select “Add Memo” and the page will refresh with the memo added.

Queue List

Select Queue
Test Queue 1

Order	Arrival Time	Appointment Type	Patient	Memo	Completion	Actions
1	13:01	Queue	TEST, TEST	13:02 JS This is a test memo <small>Add</small>	No	<input checked="" type="checkbox"/>
2	13:01	Queue	TEST2, TEST	<small>Add</small>	No	<input checked="" type="checkbox"/>
3	13:02	Queue	TEST3, TEST	13:02 JS Multiple Memos Test <small>More Add</small>	No	<input checked="" type="checkbox"/>

Figure 70: Queue List With Added Memo Column.

The most recent memo will appear if multiple memos are added to the same patient. However, there will be a “More” button. If a user needs to see all memos for a patient, they can select More, and the memos will display in a pop-up as shown below.

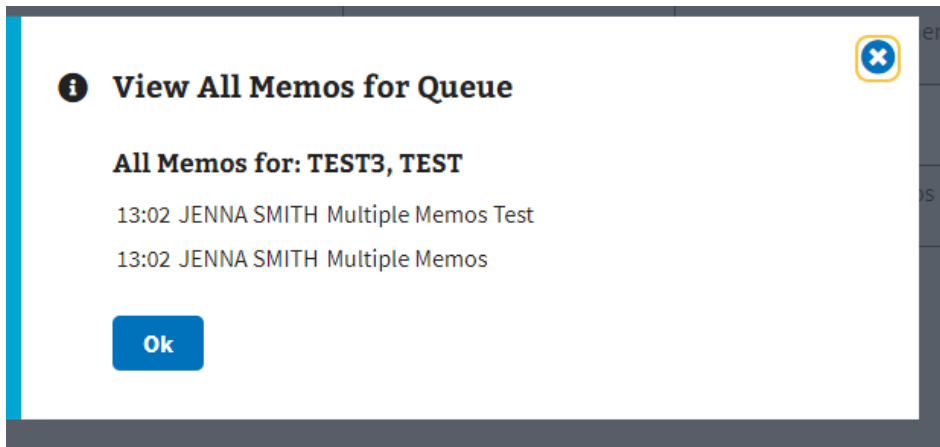


Figure 71: View All Memos For Queue Pop-Up.

5.5 Action Column Icons

5.5.1 Viewing Current Day Appointments

VSECS gives users the ability to view whether a patient has multiple appointments for the current day, across all clinics.

VSE for Clinical Staff

Daily Appointment List

Select Clinic List: CHY0025

3 checked in of 17 | 1 eCheck-ins | 2 Pre-Check-ins

Appointment data is no older than: Dec 29 2023 1:14:00 PM

Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-ins	eCheck-ins	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]
10:00	✗ Not Checked in	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[i] [b] [m]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]
09:30	✗ Not Checked in	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]
09:00	✗ Not Checked in	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]

Figure 72: Image Displaying The Current Day Appointments Button.

5.5.2 Viewing Medications List

VSECS gives users the ability to view the list of medications associated with the patient. This functionality is available on both the Daily Appointment List and Daily Workflow List.

To view the patient's Medications List:

1. Go to the Daily Appointment List/Daily Workflow List, from the Action column, click on the Medications button displayed on the left side of the Actions column.

VSE for Clinical Staff

Daily Appointment List

Select Clinic List: CHY0025

3 checked in of 17 | 1 eCheck-ins | 2 Pre-Check-ins

Appointment data is no older than: Dec 29 2023 1:14:00 PM

Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-ins	eCheck-ins	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]
10:00	✗ Not Checked in	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[i] [b] [m]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]
09:30	✗ Not Checked in	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]
09:00	✗ Not Checked in	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[i] [b] [m]

Figure 73: Medications Button.

2. If the record is sensitive, a Sensitive Record pop-up page displays asking if you want to proceed with viewing the Medication List. Click "Yes" to view the Medications List record or click "No" to go back to the Daily Appointment or Workflow List.



Figure 74: Sensitive Record Pop-Up Page.

3. The Medications List page displays with the list of the patient’s medications.

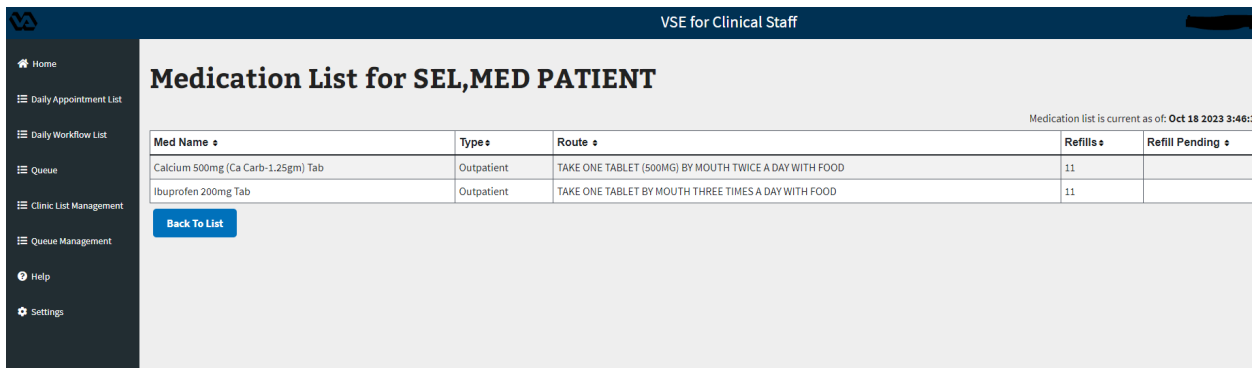


Figure 75: Medication List Page.

5.5.3 Printing Pre-Visit Summary

This VSECS functionality allows the staff members the ability to print or save a PDF format of the Pre-Visit Summary for a patient to ensure patients are informed before their appointment. This functionality is available on both the Daily Appointment List and Daily Workflow List.

To print/save the patient’s Pre-Visit Summary,

1. Go to the Daily Appointment List/Daily Workflow List, from the Action column, click on the Pre-Visit Summary button displayed on the right side of the Actions column.

Appt Time	Check-in Time	Clinic	Patient	DOB	Current Check-in Steps	Pre-Check-in	eCheck-in	Demographics	Insurance	Actions
08:00	✓ Checked in at 08:00 ✗ Checked Out at 09:25	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[View] [Print]
10:00	✗ Not Checked in	CHY ACUTE CARE 1	TEST,CHUCK	1970-12-23	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✓ Verified	[View] [Print]
11:00	✓ Checked in at 10:45 ✗ Checked Out at 12:30	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[View] [Print]
13:00	✓ Checked in at 12:59	CHY ACUTE CARE 1	TEST,CLEANUP	1960-09-20	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[View] [Print]
09:30	✗ Not Checked in	SEL FL30	SEL_FLAGS PATIENT	1979-01-21	No Check-in Steps Started	✗ PRE-CHECK-IN NOT STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[View] [Print]
09:00	✗ Not Checked in	SEL VL15	SEL_MED PATIENT	1956-06-20	PRE-CHECK-IN STARTED	⚠ PRE-CHECK-IN STARTED	✗ E-CHECK-IN NOT STARTED	✗ Needs Update	✗ Needs Verification	[View] [Print]

Figure 76: Pre-Visit Summary Button.

2. If the record is sensitive, a Sensitive Pre-Visit Summary Record pop-up page displays asking if you want to proceed with viewing the Pre-Visit Summary record. Click “Yes” to view the Pre-Visit Summary record or click “No” to go back to the Daily Appointment or Workflow List.

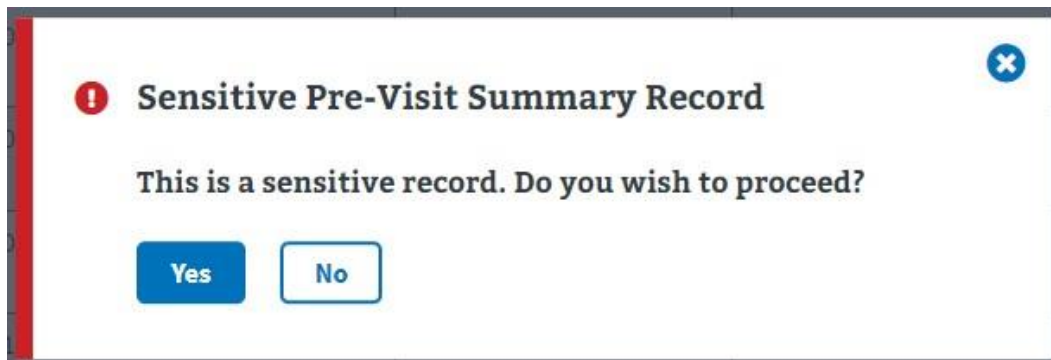


Figure 77: Sensitive Pre-Visit Summary Record Pop-Up Page.

3. The Pre-Visit Summary Page is displayed on your default browser in a separate tab in PDF format where it can either be printed or saved.

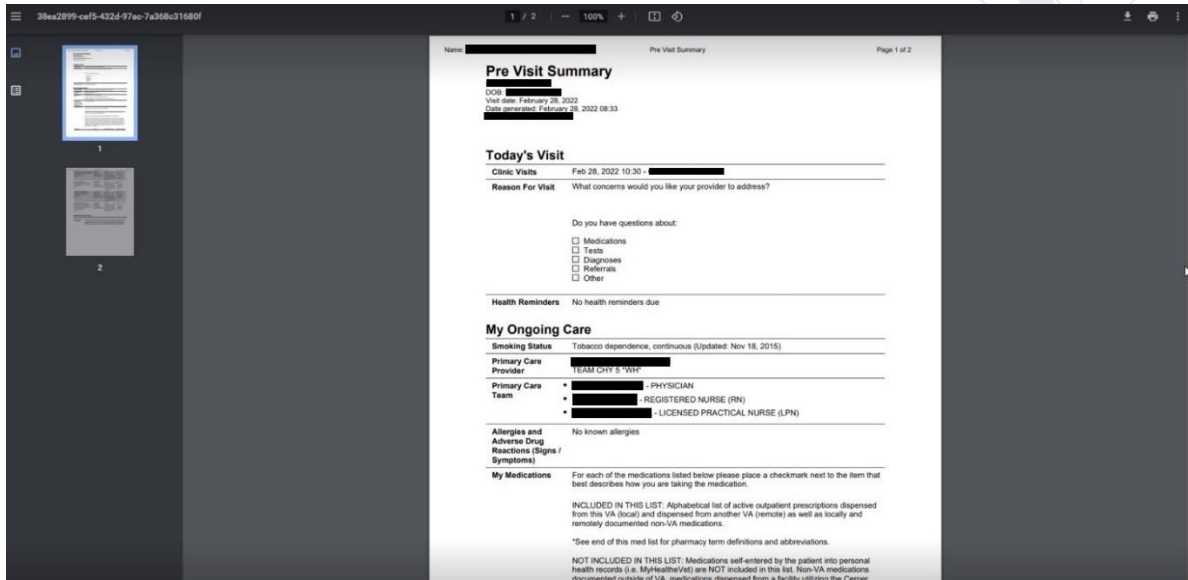


Figure 78: Patient's Pre-Visit Summary.

5.6 Messaging

On the Daily Workflow and Daily Appointment lists, patients who have started the eCheck-in process meet the criteria for messaging and will have a message icon under the Actions column within their appointment row.



Appt Time	Check-In Time	Clinic	Patient	DOB	Current Check-In Steps	Pre-Check-In	eCheck-In	Demographics	Insurance	Actions
11:01	Not Checked In	SEL VL30	SEL, SEN MED INPATIENT	1952-08-27	E-CHECK-IN STARTED	PRE-CHECK-IN NOT STARTED	E-CHECK-IN STARTED	Up-To-Date	Needs Verification	
14:00	Not Checked In	SEL VL30	SEL, PATIENT TWO	1982-02-27	PRE-CHECK-IN STARTED	PRE-CHECK-IN STARTED	E-CHECK-IN NOT STARTED	Needs Update	Needs Verification	

Figure 79: Image Showing The Added Message Icon Under The Actions Column.

When the message icon is selected for an appointment, a messaging page will then load for the patient in context. The Messages page includes the option to send the patient a message and displays messages that have previously been sent.

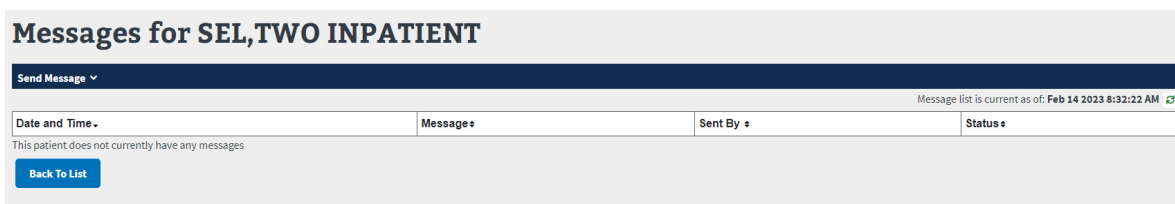
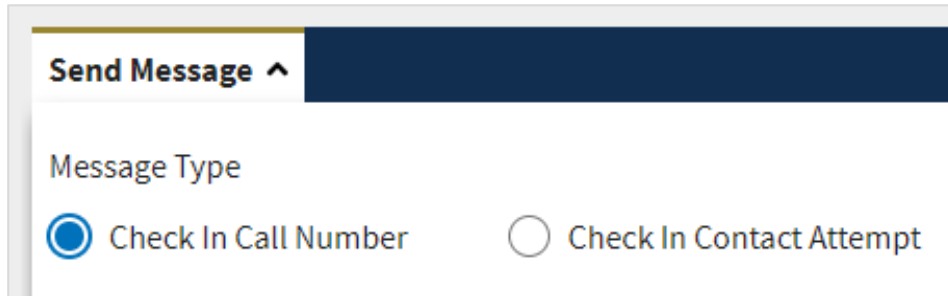


Figure 80: Message Page.

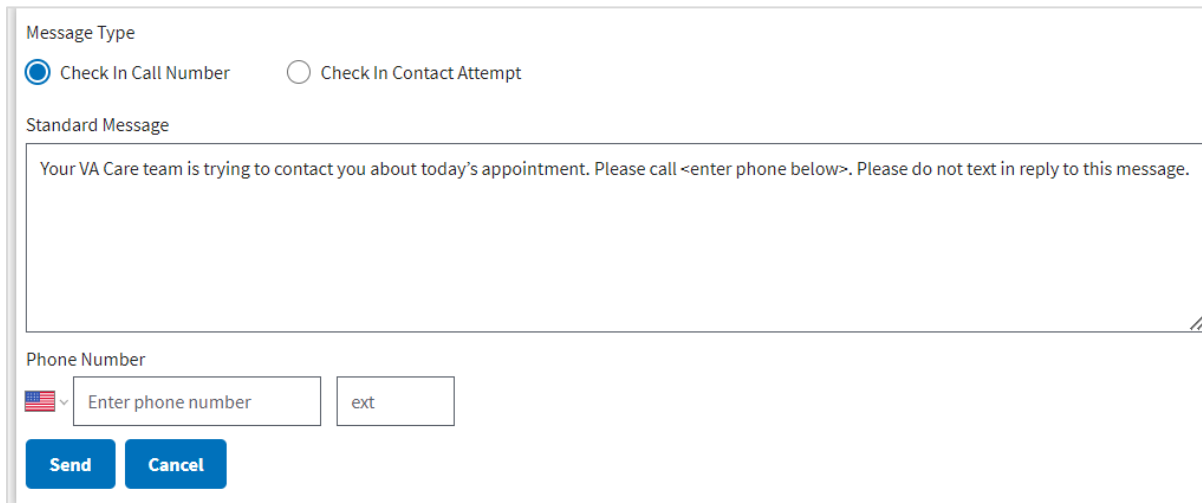
To send a message, the user will click the drop-down by Send Message. The drop-down will include two message types that can be sent to the patient: Check In Call Number or Check In Contact Attempt.



The screenshot shows a 'Send Message' button with a dropdown arrow. The dropdown menu is open, displaying the title 'Message Type' and two radio button options: 'Check In Call Number' (which is selected) and 'Check In Contact Attempt'.

Figure 81: Send Message Drop-down Showing Check In Call Number Or Check In Contract Attempt.

Each message type has a text template pre-populated in the Standard Message field. Below is an example of the default message for each message type.



The screenshot shows the 'Check In Call Number' message form. It includes a 'Message Type' section with 'Check In Call Number' selected. Below is a 'Standard Message' text area containing the pre-populated text: 'Your VA Care team is trying to contact you about today's appointment. Please call <enter phone below>. Please do not text in reply to this message.' At the bottom, there is a 'Phone Number' section with a country selector (USA), an 'Enter phone number' input field, an 'ext' input field, and 'Send' and 'Cancel' buttons.

Figure 82: Check In Call Number With Default Message.

Message Type

Check In Call Number Check In Contact Attempt

Standard Message

Please call your VA Care team at <enter phone below> after returning from lab or x-ray. Please do not text in reply to this message.

Phone Number

Figure 83: Check In Contact Attempt With Default Message.

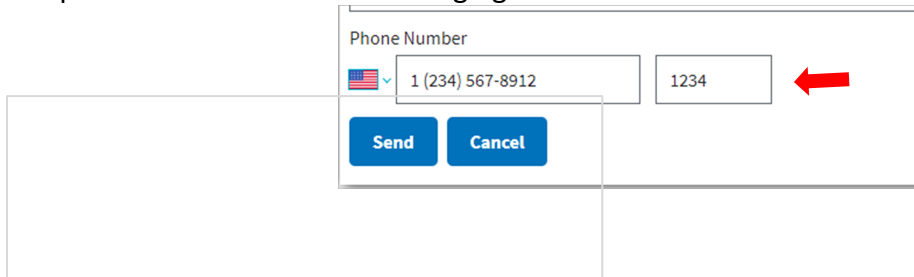
The user will need to fill in the appropriate phone number in the Phone Number field under the Standard Message. This will insert the phone number into the text of the message. The standard message field cannot be edited.

The phone number field for Messaging includes a drop-down for country to account for international numbers.

Taiwan
Tajikistan
Tanzania
Thailand
Timor-Leste
Togo
Tokelau
Tonga
Trinidad and Tobago
Tristan da Cunha
Tunisia
Turkey
Turkmenistan
Turks and Caicos Islands
Tuvalu
Uganda
Ukraine
United Arab Emirates
United Kingdom
United States

Figure 84: Image Showing A Drop-Down For Countries To Account For International Numbers.

The phone number field for Messaging also includes a field for extensions.



The screenshot shows a 'Phone Number' dialog box. It features a dropdown menu with a US flag icon, a text input field containing '1 (234) 567-8912', and a separate text input field for extensions containing '1234'. A red arrow points to the extension field. Below the input fields are 'Send' and 'Cancel' buttons.

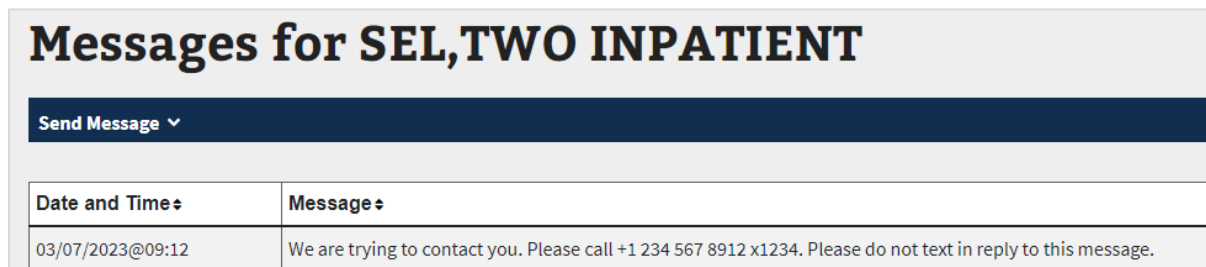
Figure 85: Image Showing A Field For Phone Number Extensions.

Once the phone number has been entered in the phone number field, the user can hit the “Send” icon on the bottom left. The user will receive a confirmation pop-up when the message has been successfully sent.



Figure 86: Confirmation Pop-Up When The Message Has Been Successfully Sent.

Once the message has been successfully sent, the Messages page will display the message details once refreshed.



The screenshot shows the 'Messages for SEL,TWO INPATIENT' page. At the top is a 'Send Message' dropdown menu. Below it is a table with two columns: 'Date and Time' and 'Message'.

Date and Time	Message
03/07/2023@09:12	We are trying to contact you. Please call +1 234 567 8912 x1234. Please do not text in reply to this message.

Figure 87: Messages Page Displaying The Message Details Once Refreshed Screenshot.

5.7 Fugitive Felon, National/Local, And Restricted Record Flags

Fugitive Felon, Local/National, and Restricted Record Flags will be displayed on Appointments in Daily Appointment List and Daily Workflow List. Hover your mouse over the flag icon below the patient's name to see the type of flag the icon represents or click on an information symbol located on the right-hand side of the Daily Appointment List and Daily Workflow List. When selected, a pop-up appears with legend information regarding the flags as shown below.

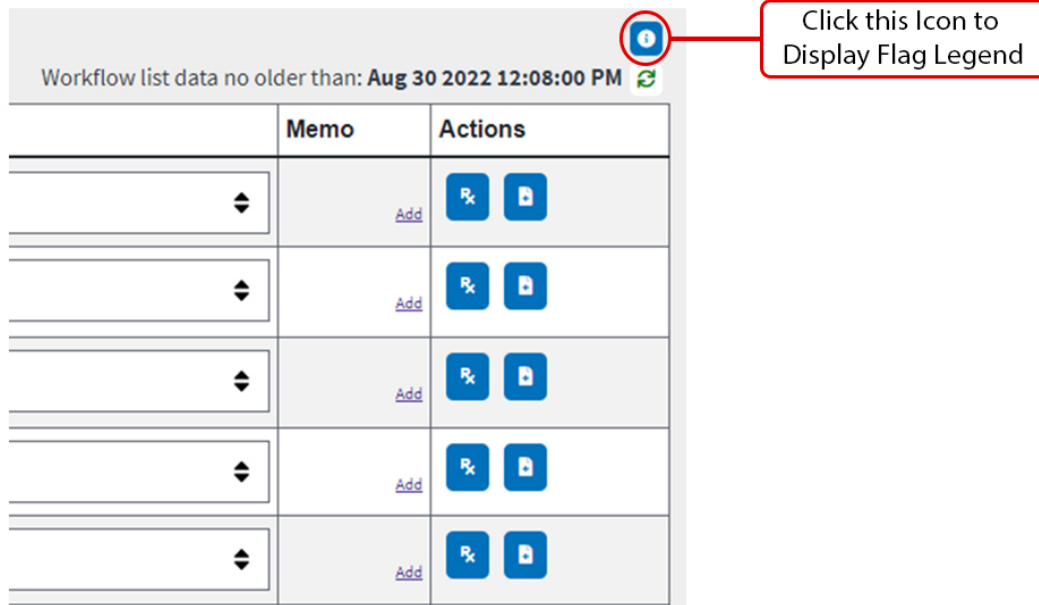


Figure 88: Information Icon To Display Flag Legend.

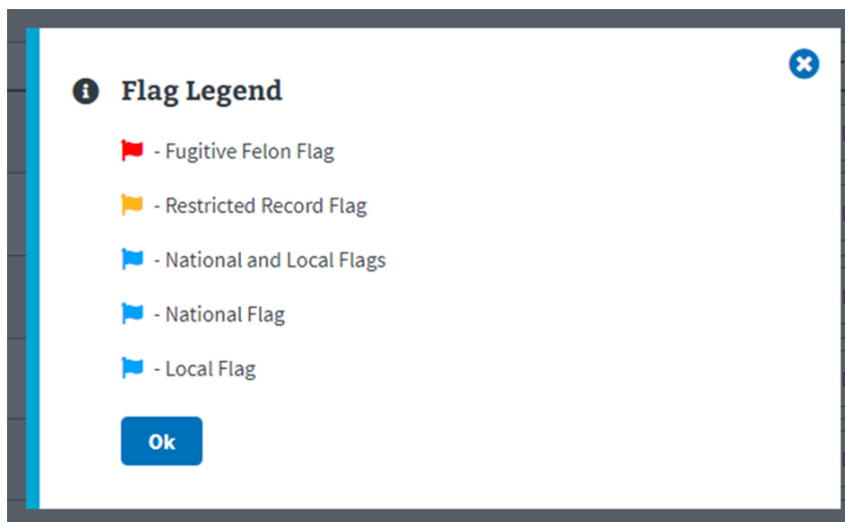


Figure 89: Flag Legend.

5.8 Displays Number Of Checked-In Appointments, Count Of eCheck-In Complete And Pre-Check-In Complete

The number of Checked-in appointments will now show on the Daily Appointment and Daily Workflow List, along with the count of eCheck-ins and Pre-Check-ins completed.

The image shows two screenshots of a web interface. The top screenshot is titled "Daily Appointment List" and features a dropdown menu labeled "Select Clinic List:" with "Test Clinic" selected. Below the dropdown, a red-bordered box contains the text "0 checked in of 22 | 1 eCheck-Ins | 2 Pre-Check-Ins". The bottom screenshot is titled "Daily Workflow List" and has an identical layout, also showing "0 checked in of 22 | 1 eCheck-Ins | 2 Pre-Check-Ins" in a red-bordered box.

Figure 90: Checked-In Appointments, eCheck-In, And Pre-Check-In Completed Indicators.

5.9 Displays Checkout Time And Indicator

The Daily Appointment List and Daily Workflow List show if an appointment has been checked out and the time of check out.

Daily Appointment List

Select Clinic List:
STATUS TEST

6 checked in of 8 | 0 eCheck-Ins | 0 Pre-Check-Ins

Appt Time	Check-In Time	Clinic	Patient
09:00	✗ Not Checked In	SQA TEST CLINIC	SQA,ATEST
09:30	✓ Checked in at 00:07	SQA TEST CLINIC	SQA,BTEST
10:00	✓ Checked in at 00:10	SQA TEST CLINIC	SQA,CTEST
10:30	✓ Checked in at 00:12	SQA TEST CLINIC	SQA,DTEST
11:00	✓ Checked in at 00:14 ✗ Checked Out at 00:15	SQA TEST CLINIC	SQA,ETEST

Daily Workflow List

Select Clinic List:
STATUS TEST

6 checked in of 8 | 0 eCheck-Ins | 0 Pre-Check-Ins

Patient	DOB	Clinic	Appointment time	Check-In Time
SQA,ATEST	1983-08-23	SQA TEST CLINIC	09:00	✗ Not Checked In
SQA,BTEST	1981-02-21	SQA TEST CLINIC	09:30	✓ Checked in at 00:07
SQA,CTEST	1959-04-03	SQA TEST CLINIC	10:00	✓ Checked In at 00:10
SQA,DTEST	1977-11-05	SQA TEST CLINIC	10:30	✓ Checked In at 00:12
SQA,ETEST	1982-02-27	SQA TEST CLINIC	11:00	✓ Checked In at 00:14 ✗ Checked Out at 00:15

Figure 91: Check-Out/Check-In Time And Indicators.

6 Troubleshooting/Help Section

For any VSECS-related issues, contact the Enterprise Service Desk (ESD) or create a ticket through ServiceNow (SNOW)/YourIT service portal and assign the ticket to the Scheduling Support assignment group.

6.1 Enhanced Error Messages

The error message logic and verbiage have been updated to provide more information for users on the issue and potential resolution and to provide a link to a knowledge base article for further troubleshooting steps.

There are three different versions of the error message depending on the error received. The verbiage for each message is consistent except for the service associated with the error, the error itself, and the proper group to address in a YourIT ticket.

Below are the three services that can be associated with these errors and an example of the message format:

- VSE-CS
- IAM Service
- Local IT

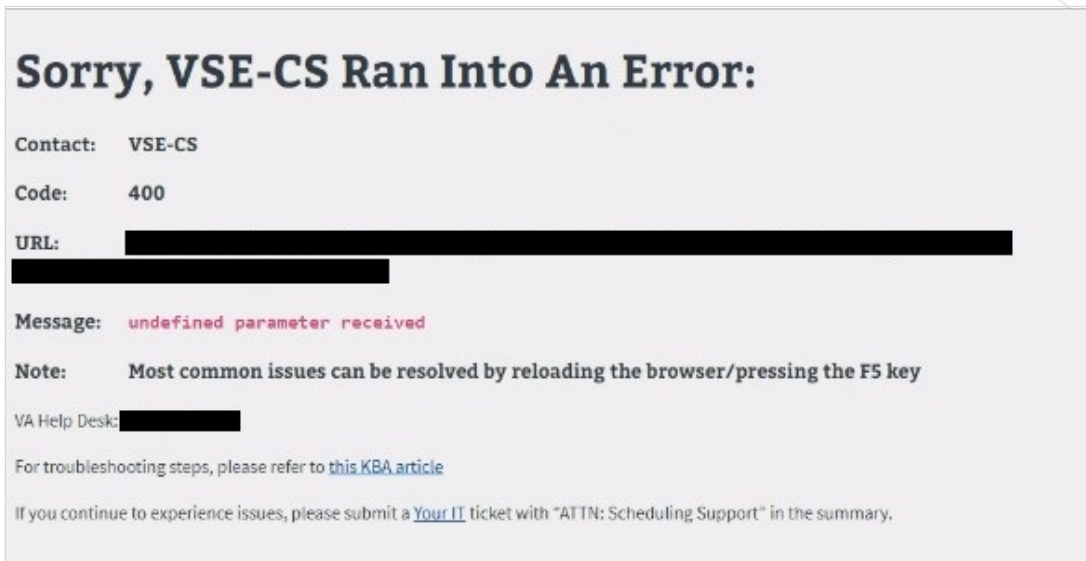


Figure 92: Enhanced Error Message.

6.2 Reset Button

The Help page now has a Reset Session button that will remove cached and stored data to help resolve errors.

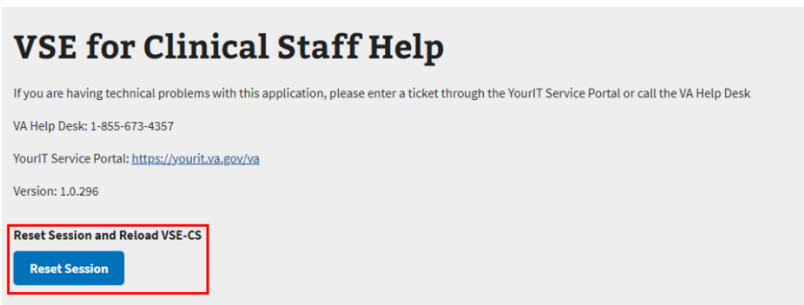


Figure 93: Reset Session And Reload VSECS.

6.3 Pop-Up Message To Ensure Users Are Running Current Version

If a user is not running the most current version of VSE-CS they will see the below notice. After selecting "Ok" the page will be refreshed and updated to the most current version.

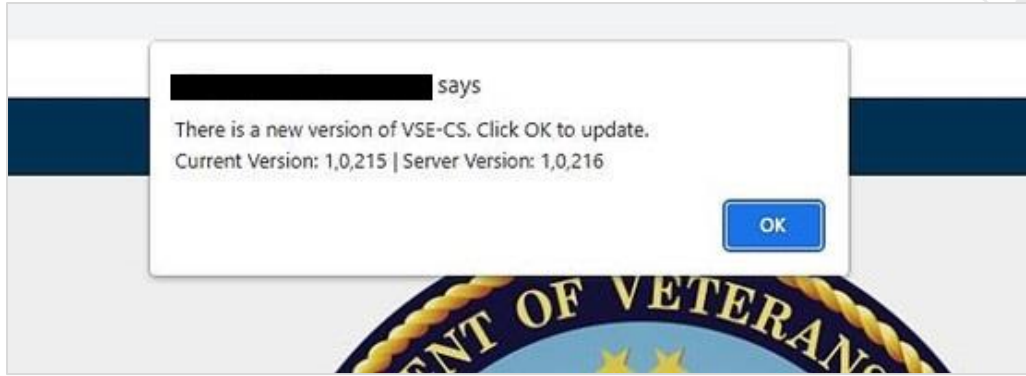


Figure 94: Pop-Up Message Informing Users They Are Not Running The Latest Version Of VSECS.

6.4 System Notifications To Users

Users can see notifications about VSECS as they are in the web application. There are two types of notifications a user can see: Show Once or Offline.

6.4.1 Show Once

The show once notification will be used to keep users informed of information about VSECS that should not stop them from using the application. The message will display as below, and the user can select OK to continue using VSECS as normal. The message will only show once unless a user clears their local cache. In this case, it will show again.

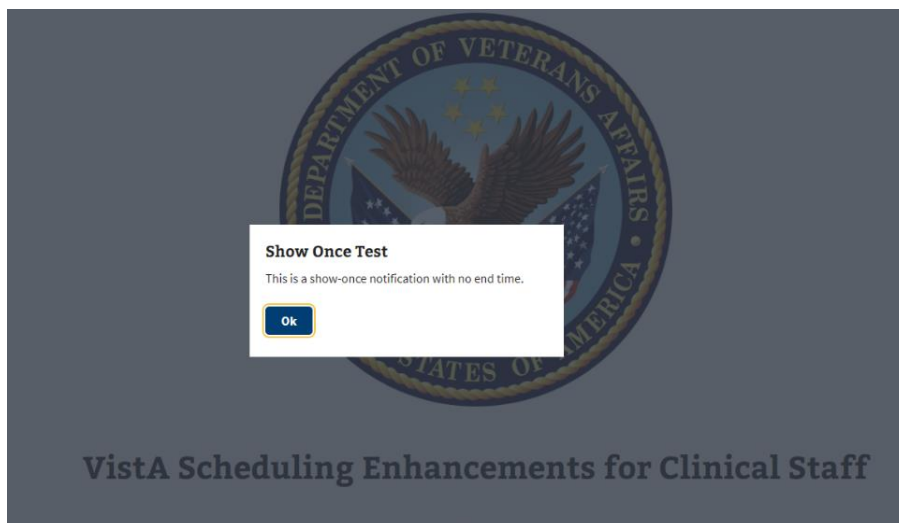


Figure 95: Image Displaying An Example Of The Show Once Notification.

6.4.2 Offline

The offline notification will be used to inform users of a degradation or a different issue that has prompted VSECS to not be available. The offline notification is persistent and will not allow the user to click out of it. When the offline notification is showing, VSECS is not available to be used.

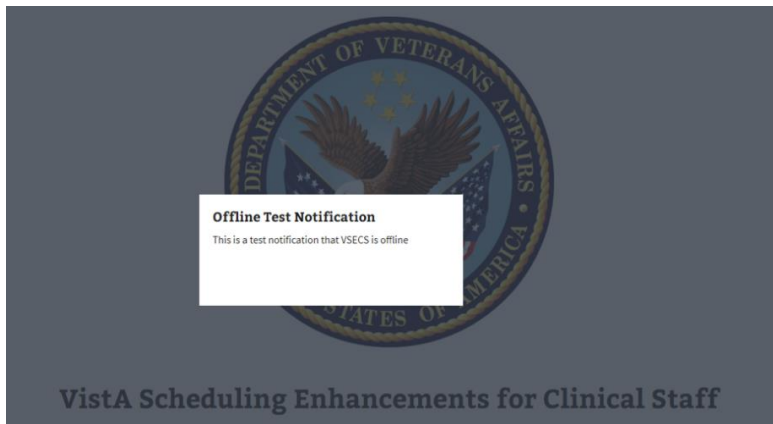


Figure 96: Image Displaying An Example Of The Offline Notification.

7 Appendix

7.1 Appendix A - Acronyms And Abbreviations

Term	Description
IAM	Identity and Access Management
PIV	Personal Identity Verification
SSOi	Single Sign-On Internal
VA	Department of Veterans Affairs
VHA	Veterans Health Administration
VistA	Veterans Health Information Systems and Technology Architecture
VS	VistA Scheduling
VSE	VistA Scheduling Enhancements
VSECS	VistA Scheduling Enhancements for Clinical Staff