



Scheduling Manager App

Quick Start Guide



VA
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Overview



The Scheduling Manager mobile application (app) allows U.S. Department of Veterans Affairs (VA) schedulers to receive and book appointment requests sent by patients through the Veteran Appointment Request (VAR) App, and securely send messages to patients who are using the VAR App.

1

Prerequisites

To use the Scheduling Manager App, you must be a VA employee with access to Veterans Health Information Systems and Technology Architecture (VistA) scheduling.

2

Getting to Know the Screen

When you log in to the Scheduling Manager App, you will see two main navigation sections of the app:

- Veteran Requests – view patients' appointment requests and send secure messages to patients who are using the VAR App
- Booking – select a clinic, date and time, and book appointment requests

NOTE: Before you can book an appointment, you must first select a specific patient appointment request in the Veteran Requests tab.

3

Viewing a Patient's Requested Appointments

When you first log in to the Scheduling Manager App, your screen will default to the Veteran Requests tab and you will see a list of appointment requests from Veterans using the VAR App that shows you:

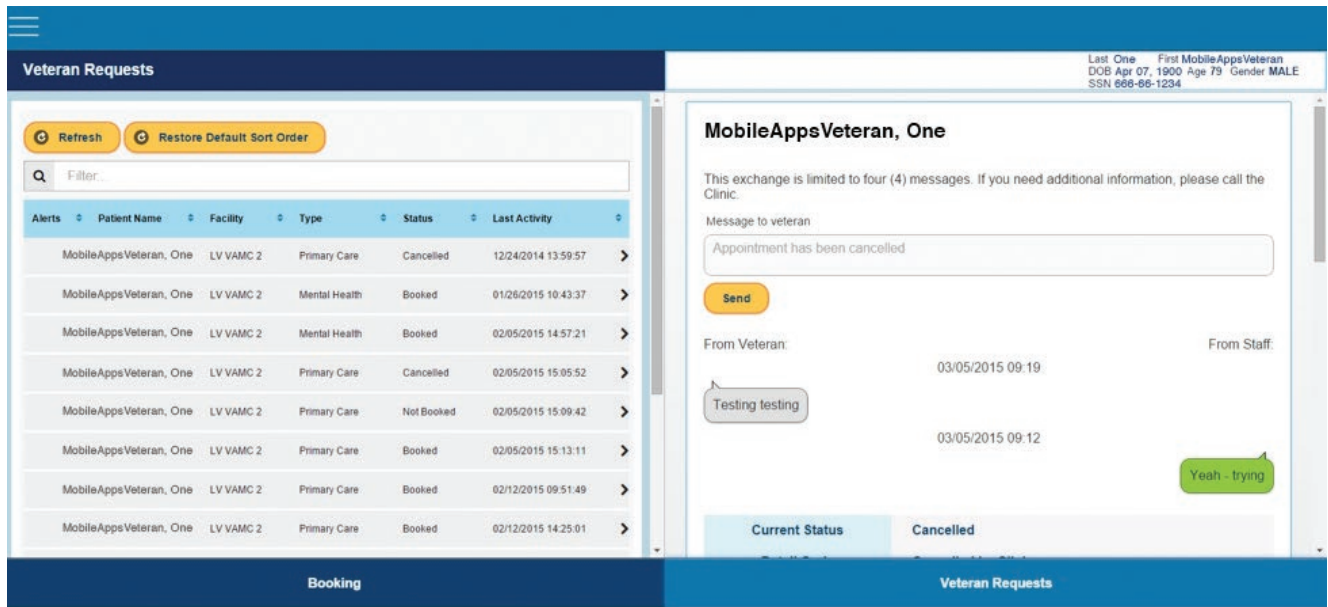
- If there is an alert on the request
- Patient's name
- Facility
- Type of appointment
- Appointment status (submitted, booked, not booked or cancelled)
- Date and time when the request was last acted upon

You can sort the appointment request list by tapping any of the column headers. (To return to seeing all appointments, tap **Restore Default Sort Order**. To view any new requests that have come in from the VAR App and see the most up-to-date list of appointment requests, tap the **Refresh** button.) To select a specific appointment, tap on the appointment within the list and the appointment details, and any messages to and from the patient about the appointment will appear in the right pane of your screen.

4

Messaging a Patient

To message a patient about an appointment, you must first tap the appointment that is the topic of your conversation. The appointment details and any past messages will appear in the right pane of your screen. Type your comments (up to 100 characters) in the Message to Veteran box, and then tap **Send**. **NOTE:** A conversation is limited to four total exchanges, and messages should not be used to inform patients that appointments have been cancelled.

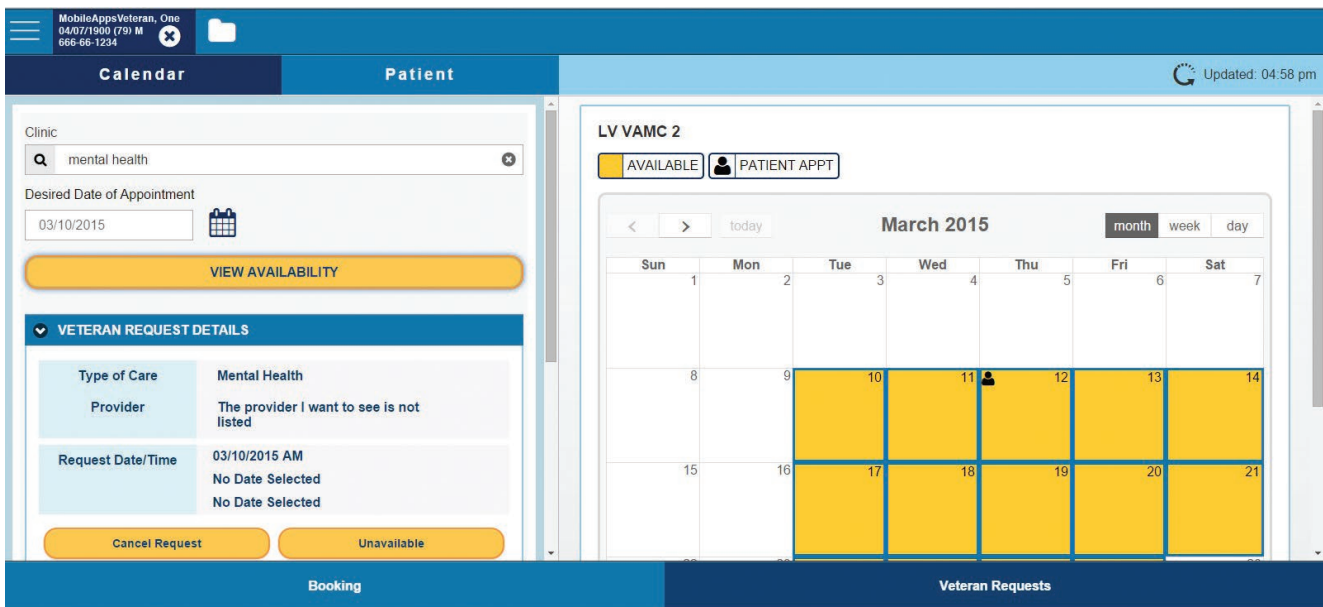


5

Booking an Appointment

Under the Veterans Requests tab, tap the specific Submitted appointment request you would like to book so that its details appear in the right pane of your screen. Tap the **Process Request** button to go to the Booking tab. Your screen will default to the Calendar view. Begin typing a type of clinic into the Clinic search bar and a drop-down list of available clinics will appear. Tap a type of clinic (**NOTE:** Because Veterans can only request primary care and mental health appointments through the VAR App, be sure to select an appropriate clinic), then tap the calendar icon under the Desired Date of Appointment, and a pop-up calendar window will appear. Scroll to choose your desired month, date and year, and tap **Set** to save your desired date.

Tap **View Availability**, and a calendar will appear in the right pane of your screen. Available dates will be highlighted in yellow. (You can change how you view availability by tapping the **month**, **week** or **day** tabs next to the month.) If you are viewing the calendar as monthly or weekly, tap on a date you would like to book. Tap a time frame for the appointment, and a Book Appointment pop-up window will appear. You will see the patient and appointment details, indicate the Purpose and Appointment Type, and if desired, type any comments into the Notes box. Tap **Book Appointment**, and you will go to a confirmation screen that says your appointment is successfully booked.



6

Canceling a Patient's Appointment Request

After you have selected a Submitted appointment request in the Veterans Requests tab, you will go to the Booking tab, where your screen will default to the Calendar view. Tap the **Cancel Request** button in the left pane underneath the appointment request details and a Cancel Appointment Request pop-up window will appear. Tap either **Veteran Request** or **Clinic** to indicate who is cancelling the request, and then tap **Save** to submit the cancellation. You will go to a screen confirming that the appointment request has been officially cancelled. **NOTE:** This cancels the request only. Scheduled Appointments must be cancelled through the Future Appointment list under the Booking tab.

7

Viewing a Patients' Future Appointments

Tap the **Patient** tab at the top of the Booking tab to view information about the patient whose appointment request you have selected. You will see a Future Appointments tab on the left pane of your screen with a drop-down list appear that shows the date, provider name and clinic/specialty of the patient's future appointments. Tap the specific future appointment you would like to view. The clinic and appointment details will appear in the right pane of your screen.

Cancelling a Patients' Future Appointments

Tap the **Patient** tab at the top of the Booking tab to view information about the patient whose appointment request you have selected. You will see a list of the patient's future appointments. Tap the appointment you would like to cancel so that the appointment's details will appear in the right pane of your screen, and then tap the **Cancel Appointment** button. A pop-up Cancel Appointment box will appear. Fill in the relevant information about the cancelation and then tap **Cancel Appointment** to confirm.

NOTE: You can only see a patient's appointment information when you have selected one of the patient's submitted appointment requests in the Veteran Requests tab. If a patient does not have a current request with the status of "Submitted," you will not be able to view or cancel future appointments.

The screenshot shows the Scheduling Manager App interface. At the top, there is a header with the user's name 'MobileAppsVeteran, One', phone number '04071900 (79) M', and extension '666-66-1234'. Below the header, there are two tabs: 'Calendar' and 'Patient'. The 'Patient' tab is active, and the screen is updated at 03:32 pm. On the left, there is a 'FUTURE APPOINTMENTS' section with a table listing appointments. The table has columns for Date, Provider Name, and Clinic / Specialty. One appointment is listed for 03/18/2015 at MobileAppsVeteran, One, PRIMARY CARE. On the right, there is a detailed view of the selected appointment. It includes a warning: 'When in process, this request will be locked for other users.' with a 'Cancel Appointment' button. Below this, there are sections for 'Clinic Details' and 'Appointment Details'. The 'Clinic Details' section shows 'Clinic: PRIMARY CARE' and 'Ask For Check In: No'. The 'Appointment Details' section shows 'Current Status: FUTURE', 'Type: SERVICE CONNECTED', 'Date: 03/18/2015', 'Time: 09:00', 'Length: 60 mins', and 'Booking Notes: This appointment was booked from a Veteran Request.' At the bottom, there are two tabs: 'Booking' and 'Veteran Requests'.

Date	Provider Name	Clinic / Specialty
03/18/2015	MobileAppsVeteran, One	PRIMARY CARE

Clinic Details	
Clinic	PRIMARY CARE
Ask For Check In	No

Appointment Details	
Current Status	FUTURE
Type	SERVICE CONNECTED
Date	03/18/2015
Time	09:00
Length	60 mins
Booking Notes	This appointment was booked from a Veteran Request.

Help and Additional Information

Additional Training Materials for the Scheduling Manager App: More resources, such as a User Manual, Slideshow and FAQs, can be found on mobile.va.gov/training.

Help Desk Information: If you need help with the Scheduling Manager App, dial **1-855-500-2025** to speak with a VA representative. The Help Desk is open weekdays from 7 a.m. to 7 p.m. CT. For TTY assistance, dial 711.