



Virtual Care Manager

Version 3.0

User Guide

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User Guide

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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)
 - Colleagues
 - VistA clinic(s)
 - Create, edit, and join Video Visits.
- **My VA Images:** View photo, video, and telederm requests to patients.
- **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 a patient's appointments (video, phone, in-person). Create, edit, and join Video Visits.
- **My VA Images:** Request patients submit photo or videos to providers.
- **Documents:** Progress Notes, Discharge Summaries, Radiology notes, and Surgery notes
- **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.
- **Patient Generated Vitals & Health Data:** View Patient-specific Power BI dashboard for multiple health measures
- **Diabetes Dashboard:** View Patient-specific Power BI dashboard for Diabetes measures

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** icon with the gear icon on the right side of the top bar, to see the drop-down menu for Preferences, VistA Site, and About VCM. Select the **Help** button with the question mark on the right side of the top bar for options for assistance, what to do in case of an emergency, and for Additional Information. All items in the toolbar are available from My Workspace, Patient Care, Clinical Dashboard, and Configuration tabs.

2.1 Preferences

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

2.1.1 Contact Info

The information on the **Contact Info** 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.

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. If you select to receive text, you must enter a cell phone number.

2.1.3 Colleagues

The Colleagues tab allows the user to include colleague names, emails, and phone numbers. Colleague emails will be used to fetch appointments from the **My Workspace – Schedule tab**.

Select the **Add Colleague** button to easily add up to 20 other healthcare providers with whom you most frequently collaborate to easily include them in Video Visits.

2.1.3.1 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 -> Colleagues** and then enters the colleague contact information.
2. Now, the provider should be able to see all the other colleagues' Video Visits in **My Workspace**. They will be combined with the additional provider's own visits but in the details, the additional provider will see the provider's name for the one scheduled.
3. If 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.

2.1.4 Clinics for Schedules

The **Clinics for Schedules** tab allow you to link your user information profile with the profiles of up to thirty 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 criterion.
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.

2.1.5 Note VCM Templates

From **Note VCM Templates** in **Preferences**, a VCM user can create, view, and edit Templates to use when adding instructions while creating a request, adding comments back to patients on completed or submitted requests and when creating a Note to CPRS for My VA Images submissions.

There are 3 types of VCM templates the user can create – Instructions Templates, Comment to Patient Templates, and Progress Note Templates. The templates are displayed by type in the Templates tab. The dropdowns allowing these templates to be selected, are filtered by type and display only templates of a single type.

To create a Note Template, select **Create New Template**. In the **Add Template** modal, enter a **Template Title** and **Template Body** and select the Template Type. Click **Add Template** when done to create the new template. Users can also get to the Add Template modal directly from the dropdowns, allowing the users to select templates.

An existing Note Template can be edited or deleted by selecting the **View/Edit/Delete** link for that Note Template. With the View/Edit/Delete Template modal open, the VCM user can update the Type, Title, and/or Body of the Template and the select **Save Template** to save the changes. The user can also select the **Trashcan** icon to delete a Note Template. Users can also navigate to the View/Edit/Delete Template modal directly from the dropdowns that allow the users to select templates.

Note: Note Templates are unique to the VCM user.

2.1.6 Navigation

From **Preferences**, a VCM user can select where to start in the application when they launch it. The Navigation tab offers the option to open VCM in My Workspace, Patient Care, Clinical Dashboards, or Configuration. Using the dropdown fields, the user can also select the default display once they are in **My Workspace** or **Patient Care** (regardless of whether either of these are their navigation default at sign-in). The defaults are **My Workspace** for sign-in navigation and for **Schedule** to display within My Workspace.

After selecting a VCM tab, the user can select the menu option from that tab. They can then set their menu preference for the unselected tab. After closing and re-starting VCM, the selected tab and menu options will become the defaults for the user.

2.2 VistA Site

Hovering over **VistA Site** from Settings displays the VistA Site into which you are currently authenticated.

2.3 About VCM

The **About** modal displays the current VCM Version and a brief summary of the features available in 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. The external applications available are Annie, Secure Messaging, and VVC Now.

4. Feedback UI

The **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

The **Patient Care** area of VCM 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)*.

The VA.gov profile is the source for the patient's 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 **Patient 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 help you quickly identify patients with recent health data submissions, a Patient-Generated Health Data (PGHD) badge will appear in the search results. This badge is displayed next to the patient's Last 4 of SSN for any patient who has submitted PGHD within the last 24 months. This allows the user to identify patients with recent submissions without needing to open their individual records.

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. If the patient is deceased, **Status: Deceased** will be displayed upon patient profile expansion.
4. 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.

If the patient is deceased, a **Deceased Patient** modal displays to inform the user of the Deceased Date and requires the user to confirm to proceed.

Upon confirmation, if the patient record is restricted, a **Warning - Restricted Record** modal is displayed 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 help you quickly identify patients with recent health data submissions, a Patient-Generated Health Data (**PGHD**) badge will appear in the search results. This badge is displayed next to the Patient Name for any patient who has submitted PGHD within the last 24 months, allowing you to quickly identify them without opening their individual records.

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’s name, expand the record to confirm the identified patient by selecting the “+”, or “**plus-sign**” to the right of their name.
4. If the patient is deceased, a status of Deceased will be displayed upon patient profile expansion.
5. 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 help you quickly identify patients with recent health data submissions, a Patient-Generated Health Data (**PGHD**) badge will appear in the search results. This badge is displayed next to the **Patient Name** for any patient who has submitted PGHD within the last 24 months, allowing you to quickly identify them without opening their individual records.

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’s name, expand the record to confirm the identified patient by selecting the “+” to the right of their name.
3. If the patient is deceased, a status of **Deceased** will be displayed upon patient profile expansion.

4. 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.

5. 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, age/gender, SSN, and deceased status are fully displayed in this modal for all patients.

If a patient has had a Video Visit within the past two years, a badge displays with the patient information at the top of the page. If the patient has any government-furnished equipment (GFE), 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.

If a patient has had an ATLAS Appointment within the past two years, a badge displays with the patient information at the top of the page. Hovering over the badge will provide more context for the user.

If the user has an active secure messaging account in My HealthVet, an MHV icon displays. Hovering over the icon displays MHV icon usage. Selecting the icon opens a modal with further information about Secure Messaging.

If the user has a VA-loaned iPad, an icon displays in the header bar. Hovering over the icon displays text that the user has a VA-loaned iPad. Selecting the icon opens a modal with details about the iPad issued to the Patient.

If the user has VA-issued peripheral devices an icon displays in the header bar. Hovering over the icon displays that information. Selecting the icon opens a modal that lists all VA-issued peripheral devices for that Patient.

If the user has VA login access with ID.me or Login.gov, an icon displays in the header bar indicating ID.me or Login.gov or both; hovering over the icon displays that information.

5.2 Patient Header Information

5.2.1 Badges

When a patient has been selected, badges relevant to that patient display below the patient's name. Hovering over a badge will display text explaining the badge. If a badge has a dotted line below the text, selecting that badge will open a modal. Badges that may be displayed as follows:

- MHV Access – Patient has access to Secure Messaging
- Video Visit – Patient has had a Video Visit scheduled within the past 24 months
- ATLAS - Patient has had an ATLAS appointment scheduled within the past 24 months

- PGHD – Indicates the patient has submitted Patient-Generated Health Data (PGHD) within the past 24 months. This badge is displayed on the **Patient Search** results list (see Section 5.1) and in the **Patient Header** after a patient is selected.
- Loaned iPad – Patient has a VA-issued iPad
- Peripherals – Patient has VA-issued peripheral devices
- ID.me/Login.gov - Patient has veteran login access with either ID.me or Login.gov or both.

5.2.2 Patient Header

Information in the Patient Header section includes Date of Birth, Age/Gender, a masked SSN, and Deceased Status. Select the Patient header area to display the full SSN and patient address and phone number.

5.3 Appointments

5.3.1 Upcoming Appointments

Scheduled appointments for a patient can be viewed within their Appointments tab. Appointments displayed include Video to Home, Video to VA Location, ATLAS, Store and Forward, Telephone, and In-Person.

Appointment Icons displayed in the List View:

- Video Camera – appointment is Video to Home or ATLAS
- Double Video – appointment is Video to VA Location
- Telephone – appointment is by telephone
- Two People – appointment is In Person

Clinic stop codes can also determine the icon displayed for an appointment. Stop-Codes can identify a clinic as being:

- Provider-centric for Video to VA Location
- Patient-centric for Video to VA Location
- Store and Forward
- Video to Home

If the Video Camera or Double Video icons are solid colors then there is an associated VMR for that Video Visit. If the Video Camera or Double Video icons are hollow outlines then there is no associated VMR for the Video Visit.

5.3.1.1 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 Appointment Details.

Full appointment information can be viewed in **Details View**.

5.3.1.2 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.

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

If the appointment type is an ATLAS appointment, then the ATLAS Site POC information will be included within the Appointment Details View.

A double camera icon in Details View indicates that the appointment type is Telehealth Video to VA Location and both the Provider and Patient Clinics are listed.

5.3.1.3 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.

5.3.1.4 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.

5.3.1.5 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).

If the patient in context is deceased, the user will not be able to **Start Video Visit**.

5.3.1.6 Cancel Appointment

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

1. If the patient is deceased, the user can proceed to **Cancel Appointment**, option is only available for **Single Veteran Appointments**.
2. While on the details screen for an appointment, select the **Cancel Appointment** button at the bottom of the screen.

3. A confirmation modal will appear, giving you the opportunity to stop the cancelation before proceeding. Select the **Yes, Continue** button to proceed.

5.3.2 Create New Video Visit

1. On the Patient information screen, select the **Create Video Visit** button to schedule a new Video Visit.
2. If the patient is deceased, the user cannot create a Video Visit.
3. 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.
4. 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.*

Creating 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.
- a. 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.
- b. Choose the name from the list and it will be added to the appointment as the care provider.
- c. If the name is not found, enter the First Name, Last Name and Email address for the care provider manually.
- d. 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.

5. Add or verify your contact information.
6. Indicate whether it will be an ATLAS appointment; the option will default to **No**.
7. Set the date, time, and duration of the appointment.
8. 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.

9. Verify that the patient has agreed to receive messages about appointments by checking the box.
10. Selecting the **i** icon will open a modal explaining the messages the patient will receive.
11. 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 unless the Veteran has a GFE device.

If the patient profile has an international phone number, then it will display as a read-only option. A new phone number can be entered if needed.

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 besides the provider must be included to create the Video Visit.

12. 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 **Appointment Scheduled** confirmation displays once the user has selected **Confirm** and the Video Visits are created.

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.

5.3.2.1 Bypassing VVC Login for VA Loan Devices (GFE/VALD)

For Veterans using a VA-issued Government-Furnished Equipment (GFE) device, also known as a VA Loaned Device (VALD), VCM offers a streamlined entry process for Veterans attending video visits on VA-furnished equipment (GFE/VALD). When enabled, this feature bypasses the standard VA Video Connect (VVC) login screen, placing the Veteran directly into the virtual waiting room to await their provider without the need to enter their name or location.

This option is only available when creating an appointment if the following conditions are met:

- The Veteran has a GFE/VALD device associated with their profile.
- The VCM User selects **None** for both the **Patient Email** and **Patient Phone Number** fields during appointment creation.

Once these conditions are met, a new checkbox will appear below the contact information fields:

Allow Patient to bypass VVC Login (Veteran Name and Current Location)

Selecting this checkbox enables the bypass feature for this specific appointment. The setting is not saved for future appointments and must be selected each time it is needed.

Important:

- **Provider Responsibility:** When this feature is enabled, the Veteran will join the video session without entering their name or current location. As the meeting host, you are responsible for verbally confirming the Veteran's identity and their current physical location during the session for your records and for e911 purposes.
- **How the Veteran Must Join:** This bypass functionality is designed to work **only** when the Veteran joins from their VALD application. If a Veteran accesses the appointment using a link from an email or SMS message, they will still be prompted to enter their name and location as usual.

Note: For an enhanced Veteran experience, this bypass feature can work in combination with the **Allow one (1) click join when opening app** setting within the Veteran's VALD application. When both settings are enabled, the VALD app will automatically launch the Veteran directly into the VVC waiting room if it is the only appointment starting within 15 minutes or is already active.

To see a quick reminder about this feature, select the info icon **(i)** next to the checkbox; a pop-up modal will appear with the following information:

Info on Use of Vald Bypass of VVC Login

This feature is intended for Limited Use. If selected, Veterans can join the VA Video Connect session from their VA Loaned Device application without entering their Name or Current Location. The meeting host must request and add this information during the session.

5.3.3 Creating New ATLAS Appointments

1. On the **Appointments** screen, select the **Create New Appointment** button to schedule a new Video Visit.
2. If the patient is deceased, the user cannot create a new appointment.
3. 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.
4. Indicate it will be an ATLAS appointment by choosing the **Yes** radio button. The system will default to the **No** radio button.

5. If the patient has had an ATLAS appointment 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.
6. If the patient has NOT had an ATLAS appointment 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

7. 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.
8. 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.

9. Choose the desired date and verify it appears as intended.
10. 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.

5.3.4 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. If the patient is deceased, the user cannot **Resend Invite/Edit Email** but can remove the patient from a group appointment.
3. Select the **Resend Invite/Edit Email** button for the Resend Video Appointment Information modal to appear.
4. 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.

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

5.3.5 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 five guests can be invited.

5.3.6 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 five Additional VA staff can be invited.

5.3.7 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 PII/PHI 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 PII/PHI**, opening the modal, 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**.

5.4 My VA Images

My VA Images allows the creation of single or recurring photo, video or telederm requests to a Veteran, and allows the VCM user to search for Requests that have already been sent to Veterans. The Veteran will use the MVAI (My VA Images) application to respond to these photo and video requests.

Select **Create New Request** to create a new Request for the Veteran/patient in context. Options include Photo, Video and Telederm requests. If not restricted, the VCM user has the option to create a **Telederm Request**. 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

5.4.2.1 Creating a Telederm Request for a Patient.

5.4.1 Using the Filters to Search for Requests

Selecting the **My VA Images** menu in VCM will open a list view displaying existing requests for the patient in context and a panel with multiple filter options to support the search for a previously created Request. The list view can be sorted by the request start date or the images received date. Selecting “Show/Hide Filter” allows the user to collapse or display the filters. Filters include date range of the request, status, type (photo, video or telederm), the option to display created by me, unread comments, or service/specialty, as well as the option to filter by keyword to further narrow the search. All filters are optional but selecting several filters may help narrow the search.

To set a customized filter that retrieves 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.

5.4.1.1 Viewing Requests From Other Facilities

In VCM Patient Care tab after a patient is put into context, My VA Images will retrieve all the requests for the patient irrespective of the facility it was created in. As a VCM user, a provider will be able to view any request created for a patient across facilities. A facility dropdown is available in the My VA Images Patient Care filters, which lists all the facilities the patient has requests for. The list view can be filtered by facility to view requests for one or more facilities.

A request created on another facility can only be viewed. No action can be taken on these requests at this time.

My VA Images under the My Workspace tab will display only requests within the logged in facility.

5.4.2 Viewing the Request Details for a Selected Request

Selecting the **My VA Images** menu will open a list view displaying existing requests for the patient in context. Clicking on an item in the list view will open the details of the request. The details view displays the request information including the request type, request date range, facility, specialty, category, subject, instructions to patient, assigned providers, any responses received including thumbnails of the images received. The images table displays any patient entered comments about the images and the image captured date. Clicking on the thumbnails will open the images in a new tab and allow for scrolling between the multiple images.

On completed requests, the details view will also display any comments sent to the patient by the provider on request completion or as a follow-up note.

5.4.3 Creating Requests for a Patient

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 **Teledermatology** (restricted use). A modal will display alerting the user of the option to select another responsible party for a request. This allows the user to create a request on someone else’s behalf.

Users must enter the required fields 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 patient's email address will display by default. If the patient has agreed to receive SMS/text messages also, the checkbox verifying this should be checked. If available, the patient phone number will be displayed. This number can be edited when creating the Request and can be saved to the patient's contact information if the check box indicating that is selected. If the patient profile has an international phone number, then it will display as a read-only option. A new phone number can be entered if needed.

The **Request Creator** will display the authenticated VCM user, and the responsible party will default to the same VCM user also. Responsible Party can be changed using the **Change** button.

The service/specialty for the request must be selected. This will default to the last value saved by the VCM user when creating a request.

Other VA Staff may be added using the **Add VA Staff** button. 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 back to the Veteran's submitted request. The responsible party cannot be the same as the ARP.

After entering the ARP email there are required options to select a category and subject for the image request. The options for subject are determined by the category. The user can select **Other** for category and subject and enter custom information.; this information will be visible to the Veteran.

After selecting a category and subject, it is required to complete **Instructions to Patient**. This will also be displayed to the Veteran to assist them in completing the image request. VCM users can create templates for instructions that are repeatedly used and can select one or more of these templates to populate the instructions field.

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

Once the request has been created, a confirmation message and the details of the request created will display. Actions are available on the details page, including the option to **Discontinue the Request**. A request can only be discontinued if the Veteran has not started responding before the request expires.

5.4.3.1 Creating a Telederm Request for a Patient

When creating a request, non-restricted users can choose the **Teledermatology** option to create a Telederm request. The VCM user would need to indicate if the request is for an **Established Problem** or a **New Problem**. The selection of Established or New Problem determines the questions that the Veteran user will be required to answer before submitting the Request. Selecting New Problem will

allow the VCM 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.

For Telederm requests, the VCM user must select one or multiple body parts indicating what the patient should submit images of. This occurs for both **New** and **Established Problem**.

A **Reason for Request** is also required to be entered for a Telederm Request. VCM users can create templates for instructions that are repeatedly used and can select one or more of these templates to populate the Reason for Request/ Special Instructions field.

As with the other request types, once the required information has been completed, the user is prompted with a confirmation modal to clear or create the Request.

A confirmation and details will display once the Request has been created. The VCM user has the option to discontinue the request as indicated in the above section.

5.4.4 Completing a Photo, Video or Telederm Request

Once a Request is created and images/video have been provided by the patient, a provider/ VCM user is required to complete the request and can optionally write a note to the EHR with a comment back to the patient. The actions available on a request that has images/video received from a patient, include the option to **Complete the Request by Creating a Note to the EHR** or **Complete the Request without a Note to the EHR**.

5.4.4.1 Completing a Request by creating a Note to the EHR

If **Complete by Creating a Note to the EHR** is selected, the user can review the images and send a note to the EHR by completing the required fields needed to create the note (required fields are designated with a red asterisk). The request details and responses from the patient are included in the progress note body of the note being created. All images are attached by default to the note, but the VCM user has the option to remove any of the images that do not need to be included.

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

The user must electronically sign the note to submit the note to the EHR. Once signed and submitted, the note is created in the EHR, and the images are uploaded to VistA Imaging.

A comment is required to complete a request with a note. The comment added for the patient would be visible in MVAI and an email is sent to the patient indicating that the request was completed and/or has feedback from their provider. VCM users can create templates with comments that are repeatedly used and can select one or more of these templates to populate the comments field.

5.4.4.2 Completing a Request without a Note

If **Complete without Note to the EHR** is selected, the VCM user can complete the request without creating a note to the EHR. The user can review the images and has the option to send a comment back to the patient. The user would need to acknowledge that the comments would not be sent to the EHR to continue with completing the request.

5.4.4.3 Follow-up on a completed request

Once a request has been completed, a VCM user can create additional notes for the request and send additional comments to the patient. The actions available are **Create a Note to the EHR (w/ or w/o comment)** or **Comment to Patient (no Note to the EHR)**. To send a comment to the patient without a note to the EHR, the user must acknowledge by checking the **Acknowledgement** checkbox that comments will not be added to the EHR.

5.4.4.4 Follow-up on a non-completed request

Once images have been received from the Veteran, the VCM users being either the responsible party or additional providers must complete the request within seven days of receipt. Failure to complete the request within the timeframe will trigger reminders to the providers on days 9, 16 and 23 if not completed by the dates. The reminders that are sent on days 16 and 23 are additionally sent to the ARP.

5.4.5 Expired Requests

If a request has not been submitted by the Veteran by midnight of the day after the end date on the request, the request is marked as **Expired**. An email is sent to the Veteran a day before the last day to remind them to submit their images. Once a request is marked as **Expired**, the request will be closed for the Veteran and will not be able to be completed. The VCM user will have an option to **Resend the Request**. If the VCM user chooses to resend the request, a copy of the request is created and the user can select new start and end dates and make any other necessary updates to the request before resending.

5.4.6 Handling Requests for Deceased Patients

If the patient put into context is a deceased patient, **My VA Images** will allow for limited options. The VCM user will not be able to create a request for a deceased patient. A request previously created can be discontinued irrespective of whether the patient had started responding to the request or not. The actions on a request with images received from the patient or a completed request will be limited to creating a note to the EHR to complete the request.

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.

5.5 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.

Once a specific type of document is selected, a list of reports available appears in **List View**. 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 word or term will display in List View for the selected timeframe.

5.5.1 Progress Notes

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

5.5.2 Discharge Summaries

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

5.5.3 Radiology

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

5.5.4 Surgery

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

5.6 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 HealthVet, 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.

5.6.1 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 a table. **Graph View** can be selected from the graph icon at the top right of the **Measure** section.

5.6.1.1 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: Patient Generated Data (PGD) 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.

5.6.2 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.

5.6.2.1 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.

5.6.3 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.

5.6.3.1 Chem/Hem 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.

5.6.4 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.

5.6.4.1 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.

5.6.5 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.

5.6.5.1 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.

5.7 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** are selected, the condition graphs options are displayed 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.

5.7.1 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. 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.

5.7.2 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.

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.

5.7.3 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.

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.

5.7.4 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. The y-axis on the left measures activity in minutes, while the y-axis on the right measures heart rate in beats per minute.

5.7.5 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.

5.7.6 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. 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.

5.8 Diabetes Dashboard

The Diabetes Dashboard opens a PowerBI report that will display available Diabetes data for the selected patient.

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

Scheduled appointments can be viewed within the **Schedule** tab based on the user's preference emails, clinics, and colleagues. Appointments displayed include Video to Home, Video to VA Location, ATLAS, Store and Forward, Telephone, and In-Person.

If the appointment is Video to Home or ATLAS, a video camera icon displays in the list view. If the appointment is Video to VA Location, then a double video icon displays. If the appointment is Telephone, then a telephone icon will display. If the appointment is In-Person, then a two-person icon will display.

Clinic stop codes can also determine the icon displayed for an appointment. Stop Codes can identify a clinic as being provider-centric or patient-centric for Video to VA Location, as a Store and Forward, or as a Video to Home.

If there is a camera icon, or the double cameras, where the top camera is filled in, this indicates there is a VMR associated with that visit. If the cameras icons are outlines only there is no associated VMR.

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 further by using My Email Preferences, Appointment Type, Clinics, or Colleagues filters to modify the scheduled appointments shown.
3. Select an appointment from the results listed 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 will display.

For Video Visits, 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: 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 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 is displayed 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/>

If the patient profile has an international phone number then it will display as a read-only option. A new phone number can be entered if needed.
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.
11. Once all required appointment details have been added, select the **Create Video Visit** button to complete scheduling.

6.1.3.1 Bypassing VVC Login for VA Loan Devices (GFE/VALD)

For Veterans using a VA-issued Government-Furnished Equipment (GFE) device, also known as a VA Loaned Device (VALD), VCM offers a streamlined entry process for Veterans attending video visits on VA-furnished equipment (GFE/VALD). When enabled, this feature bypasses the standard VA Video Connect (VVC) login screen, placing the Veteran directly into the virtual waiting room to await their provider.

This option is only available when creating an appointment if the following conditions are met:

- The Veteran has a GFE/VALD device associated with their profile.
- The VCM User selects **None** for both the **Patient Email** and **Patient Phone Number** fields during appointment creation.

Once these conditions are met, a new checkbox will appear below the contact information fields:

Allow Patient to bypass VVC Login (Veteran Name and Current Location)

Selecting this checkbox enables the bypass feature for this specific appointment. The setting is not saved for future appointments and must be selected each time it is needed.

Important:

- **Provider Responsibility:** When this feature is enabled, the Veteran will join the video session without entering their name or current location. As the meeting host, you are responsible for verbally confirming the Veteran's identity and their current physical location during the session for your records and for e911 purposes.
- **How the Veteran Must Join:** This bypass functionality is designed to work **only** when the Veteran joins from their VALD application. If a Veteran accesses the appointment using a link from an email or SMS message, they will still be prompted to enter their name and location as usual.

Note: For an enhanced Veteran experience, this bypass feature can work in combination with the **'Allow one (1) click join when opening app'** setting within the Veteran's VALD application. When both settings are enabled, the VALD app will automatically launch the Veteran directly into the VVC waiting room if it is the only appointment starting within 15 minutes or is already active.

To see a quick reminder about this feature, select the info icon **(i)** next to the checkbox; a pop-up modal will appear with the following information:

INFO ON USE OF VALD BYPASS OF VVC LOGIN

This feature is intended for Limited Use. If selected, Veterans can join the VA Video Connect session from their VA Loaned Device application without entering their Name or Current Location. The meeting host must request and add this information during the session.

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 **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 criterion.
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 **Confirm** 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.

6.1.5 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.

6.1.6 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.

6.1.7 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 for a single Veteran. Up to 16 Additional VA Staff can be invited for a Group.

6.1.8 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.

6.1.9 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*.

6.1.10 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, Cancel** button to proceed.

6.1.11 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 creation 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.

6.1.12 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.

6.1.13 Handling Appointments for Deceased Patients

If the patient is a deceased patient, My Workspace Schedule will allow for limited options. The VCM user will not be able to create a Video Visit for a deceased patient. An upcoming single-Video Visit will display **Status: Deceased** under the patient's name in the Video Visit details. The VCM user will not be able to **Add, Resend Invite, or Edit Email** of a deceased Veteran to a previously scheduled appointment. In addition, the user cannot **Add VA Staff** or **Start Video Visit** of an upcoming individual appointment. The user can **Remove** the deceased patient from an appointment or **Cancel** the invite for a Single Veteran Appointments. Deceased Veteran cannot be added to a Group Veteran Appointment. In the **Add Veteran** modal the deceased status will display and the Veteran will not be added to the group. Deceased Veteran already in a Group Veteran Appointment, if you elect to **Edit** their contact info, Edit button previously in line with the Veterans name will be disabled. The Veterans name will also display "Status: Deceased". The Open Patient Record will display deceased status on the patient confirmation modal.

6.2 My VA Images

My VA Images 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 Created by Me, 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"**.

6.3 My VCM Notes

My VCM Notes are draft notes that have been started in VCM but have not been signed and sent to the EHR. These notes will not appear in the patient's EHR until they are signed. For each note in queue created to complete a request, 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.

The 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 words.

Once the patient's draft note has been found, the patient's name 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. If a patient is deceased, a **Deceased** status will be displayed on the **Notifications** details page and on **Open Patient Record**.

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**.

If you select and open the patient record of a deceased patient, a Deceased Patient" modal should be displayed confirming that the patient passed away on <Month DD, YYYY> with the option to confirm if you wish to continue. 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 trashcan 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 the EHR** is available. Selecting this option displays the **Save Note to the EHR** 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.

6.4 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.

6.4.1 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 and 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”.

The user can identify the same VHA facility as before, and add 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. If the user filtered by VISN 10 alone they will be able to scroll through multiple results in VISN 10, until they find the “Piquette Street VA Clinic”.

If the station code is known, **Search by Station ID** may be used to find a facility. If 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.

6.4.2 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 click on the solid star. The outline star indicates that the location is not a favorite.

6.4.3 Facility Not Set Up

If the location that is the subject of the search is not set up with the facility contact information, basic address information will display at left 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.

6.4.4 Facility Is Set Up

When a facility is set up with **Facility Contact Information** 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.

6.5 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!

NOTE: Do not store the Emergency Call Relay Center number as this number is subject to change.

6.5.1 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 the 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**.

6.5.2 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. **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.
3. Using a landline telephone or mobile phone, call the phone number displayed to connect directly to 911 at the patient's location.
4. If the 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.

6.5.3 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 usage 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.

6.5.4 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

7. 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.

7.1 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.

7.1.1 Tile View of Available Dashboards

The user may select the option to display available dashboards in **Tile View**. The display defaults to **Tile View**.

7.1.2 List View of Available Dashboards

The user may select the option to display available dashboards in **List View**.

7.1.3 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**. 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.

7.2 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.

8. 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).

8.1 ATLAS Support

The ATLAS Support menu option allows the user 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).

8.1.1 Sites

All ATLAS Sites will be displayed 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.

8.1.1.1 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.

8.1.1.2 Create New ATLAS Site

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

Note: Required fields are listed as follows: Site ID, Site Name, Time Zone, Map Coordinates (longitude/latitude), Physical Street Address (including State or U.S. Territory or Philippines) and others.

When the **Physical Site Address** is entered for a site, the **Use Address to Populate Long/Lat** button will become enabled. Users can select the longitude and latitude mapping coordinates that will automatically populate in their respective fields.

The **VA Location (Station Code)** section will then be enabled to select a VAMC (default will be 100 miles from ATLAS site address) in order to associate it with the ATLAS Site. Selecting a VAMC or VA facility will return details and the user can save and close the modal.

Upon saving and closing, the modal will close and the VAMC or VA facility will then be listed as a read-only text associated VA Location to that ATLAS site.

Selecting **Edit** will then display the modal again (default 100 miles from ATLAS site address) for the user to modify if necessary.

Upon site creation, save the station code or SiteID which will then automatically populate the ATLAS post session survey URL parameters to append the SiteID at the end of the URL. This will be used to

accurately record Veteran feedback after they have completed their VVC session at an ATLAS Site and have provided feedback within the ATLAS post session survey form.

The remaining Site information includes **Site Contact Information**, **Site Status**, **Dates the Site will be Closed**, and **Number of ATLAS Rooms at Site**.

- a. For the section labeled **Site Contact Information**, the **Site Point of Contact (POC)** section is used to add and manage POCs for the ATLAS Site. This section allows for the inclusion of multiple POCs whether they are VA or Non-VA contacts.

Features and Functionality:

- i. **Add POC:**

A button located directly underneath the "Point(s) of Contact for this ATLAS Site" section label. Enables users to add a new POC by clicking the "Add POC" button.

- ii. **Add POC Modal:**

Upon selection of the **Add POC** button, a modal titled **Add Atlas Site Point of Contact** will display. Required fields are indicated with a text display in the upper right corner of the modal.

- iii. **POC Types:**

Users can add primary, secondary, and other VA/Non-VA POCs to ensure comprehensive contact information is available.

- iv. **View, Edit, and Delete POCs:**

The **Site Contact (POC)** section allows users to view POC information in a table view. Users can also edit or delete existing POCs as needed.

- v. **Error Validation and Rules:**

The system includes error validation rules to ensure that all required fields are completed correctly when adding or editing POCs. Specific error messages and validation rules will be displayed if there are any issues with the entered information.

- b. **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 will indicate that the site will be open for that date removed.
- c. 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; users can select the X icon to remove the date added if desired.
 - iv. If the 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.
- d. 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 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**. Users 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).
- e. 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).

8.1.1.3 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). The list view will also display the name and the physical address for a given site.

8.1.1.4 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 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 **Generate Set-Up Code** button, the set-up code will be generated AND the window for that code use will be active for 4 hours; if after 4 hours 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)

8.1.1.5 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).

8.1.1.6 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).

8.1.2 Templates

Templates provide convenience for ease of use across sites. Templates are schedules that can be created in advance 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.

8.1.2.1 Template Filters

- a. The filter will default to display all templates that were created by an ATLAS Support Admin
- b. Narrow the results 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.

8.1.2.2 Create New Template

- a. Select the **Create New Template** button to create a new template.
- b. Required fields – Template Name, Template Description, and Availability.

- c. By default, one row will be displayed within the Availability table for Start Time, Duration, and Status. Users 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**. Users 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.

8.1.2.3 Templates List View

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

8.1.2.4 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.

8.1.2.5 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)

8.1.2.6 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 list
- j. A table displays pre-populated slot information at the time the template was created. Note: Any changes to slot availability here will 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 against a 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 minutes.
 - 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.

8.1.3 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 allow 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.

8.1.3.1 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.

8.1.3.2 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 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)

8.1.4 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 individuals whom they want to provide ATLAS support capability to (whether it be a user who can have full access or 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).

8.1.4.1 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 to find an individual if necessary.

8.1.4.2 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: Primary Email (*from VCM Preferences*), Added By, and Role (i).
 - i. The **Primary Email (from VCM Preferences)** column will include only the primary email of the individual as read-only text that was provided by VCM Provider Preferences
 - 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 was provided (e.g.: Full or Limited). The column header includes an information icon (i). When selected, a modal will display 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 ATLAS Support user's SecID, Primary Email (only), Last Updated date (name of individual who had updated and date of when support user's role was updated), Added By (name of individual who had added the support user and date of when support user's role was added), and the ATLAS Support Role (Limited or Full).

8.1.4.3 Add ATLAS Support User

- a. 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 to find the individual that needs to be added.
- c. To search, text must be entered within the **Search by Text** field. Facility can also be selected 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**) to select 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.
- f. If it is not already assigned a support role, the **Select** button will be enabled.
- g. Selecting the **Assign** button will assign the individual the specified role and will be displayed within the table view.

8.1.4.4 Edit ATLAS Support User

- a. An individual from the table can also be edited or removed if necessary 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.
- d. If selecting VCM Preferences and editing the **Primary Email Address (VA)** field, then upon **Save & Close**, the modal will close, and the page will automatically refresh to show the latest updates to the email under the Primary Email column header within the ATLAS Support Manage Roles table.

8.2 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.

8.2.1 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 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. If 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

8.2.1.1 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**.

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

All filters display by default to allow the user 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: 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 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 need 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. Searching for Station Code 553 will result 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 so that action may be taken for the selected facility.

8.2.1.2 Verify the Facility Contact Information at the Selected Site

Once the selected **Facility Details** are displayed, 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.

8.2.1.3 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**. 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**.

8.2.1.4 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.

8.2.1.5 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.

8.2.1.6 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.

8.2.1.7 Facility Contact Verification Reminders

Five 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 within six 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 M=managers.

8.2.2 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 can 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: 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.

8.2.2.1 View staff with access Facility Contact Information Updates:

Manage User Access displays a list of all staff who have been assigned access 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.

8.2.2.2 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.

- **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. A search for “staff” could return results that include “VAStaff”, “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, including the last date the information was updated, and to take additional actions described in detail under **Remove Access**.

8.2.2.3 Add user access to Facility Contact Information Updates:

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**.

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. An all-facilities search for “VA Staff” will produce 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 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 their profiles were selected when assigning access.

8.2.2.4 Assign staff access to Facility Contact Information by VISN and/or Facility:

When assigning **Facility Contact Information** access to a VCM user from Manage Roles the default access is for all VISNs and all facilities.

By selecting **Edit** from the expanded user view access can be assigned to one or more VISNs using the VISN dropdown. The default is All VISNs. VISNs can be selected one at a time.

To further limit access within a VISN, below the VISN button select the dropdown option for Facilities. The default within a VISN is for all Facilities.

To limit access to fewer facilities within the VISN deselect **Select All** and then select only the Facilities to which that user should have access. The selected Facilities will display in the Facility dropdown box.

Additional VISNs and their Facilities can be selected by clicking the **Add another VISN** button. When VISN and Facility selection is complete select **Save Changes** to save the selections for the user.

The assigned VISN and facility information will then be displayed in the row for that user.

8.2.2.5 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”.

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. If you’d like to maintain access for the staff member, select **Cancel** instead.