# User Guide

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1. Overview
Virtual Care Manager enables clinicians to create, view, and join video visits. With Virtual Care Manager, it is easy to invite Veterans’ family or caregivers, as well as additional VA staff, to video visits.

2. Settings
Select the Settings button with the gear icon on the right side of the toolbar, to see the drop-down menu for Preferences, Help and information About VCM.

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

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

New users will need to enter contact information for the first time. Returning or existing users will have some information already included. That information should be verified to take advantage of new information options available in the current version of VCM has been captured.

Add or verify your contact information in the Contact Info section.
Select the **Add Colleague** button to easily add up to five other healthcare providers with whom you most frequently collaborate to easily include them in Video Visits.

### 2.1.2 Notifications

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

**Note:** You can opt out of receiving notifications by choosing the **No** radio-button, but all new appointments will result in an initial email notification, confirming the appointment creation.
2.1.3 Clinics for Schedules
The Clinics for Schedules tab allows you to link your user information profile with the profiles of up to ten of the healthcare provider clinics you communicate with most frequently.

1. Select the **Add Clinic** button to reveal the search field. Begin typing and a drop-down selection list will populate using that criteria.
2. Scroll to search through the results and make a choice or enter more characters to refine the options available. Choose the healthcare clinic from the list to add it to the tab.
Choose additional clinics if needed. Quickly revise your list of added clinics by selecting the “X” on the right side of the clinic name to remove it.

2.2 Help

If you need assistance with the Virtual Care Manager App, dial 1-866-651-3180 to speak with an Office of Connected Care Help Desk (OCCHD) Representative. The OCCHD is available 24 hours a day, 7 days a week. For TTY assistance, dial 711. You may also receive 24/7 assistance by visiting the OCCHD Portal at ochdsupport.ironbow.com. For mobile app training, please visit mobile.va.gov/appstore, and search for the Virtual Care Manager App to access training materials.

Emergencies

If you feel that your information may have been compromised, contact your local VA facility to obtain the contact information for your Privacy Officer. To identify your local VA facility, visit VA’s Facility Locator https://www.va.gov/find-locations/. Note that you should never use this app in an emergency situation. If you encounter an emergency, call your local medical center or dial 911.

Additional Information
2.3  About VCM

The Virtual Care Manager (VCM) app enhances clinical care for VA clinicians and schedulers by integrating telehealth and digital health solutions.

Clinicians can:
- view their entire schedule, including in-clinic and telehealth appointments, all in one place
- create, manage, and join video appointments for Veterans
- access 911 services at a Veteran's location
- view patient-generated health data (PGHD) from apps and devices, including vital signs, physiologic data from connected devices and sensors, and laboratory values in context with EHR results

Schedulers are provided an easy search capability to support creating video appointments for clinicians across their facility.

3.  External Apps

Select External Apps to launch other VA applications from Virtual Care Manager. These applications will open in a separate browser tab or window. In VCM 2.1 the applications available are Annie and Image Viewing.
4. Feedback UI

Feedback UI button is available just below the header bar in VCM from both My Workspace and Patient Care. The link to the Feedback UI application gives users an opportunity to provide comments about VCM. Selecting the Feedback UI button causes the Feedback UI application to open in a new tab or window.
5. Patient Care Tab
This tab is the Patient Care area of VCM, which provides information related to the selected patient.

**Note:** To create an appointment for a patient, they must be in the current VistA. Otherwise, refer to Section 4.1.2 Create New Video Visit for a Single Veteran (Email Only).

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

- Name
- Clinic
- Ward

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

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.

Confirm by using the **Select** button with their name.
5.1.2 Clinic Search
The default view on the Clinic search screen displays the most recent clinics in a list on the left. Clinic Search is not available for future dates. To search for a patient in Clinic, the date range must be on or earlier than the current date.

To search for a patient by Clinic:

1. Begin typing the **clinic name**. Results will appear on the right side of the screen, generated by your search criteria.
2. Search by Clinic does not support future dates.

Scroll through the results to find the patient name, expand the record to confirm the identified patient by selecting the “+”, or “plus-sign” to the right of their name. Confirm by using the **Select** button with their name.
5.1.3 Ward Search

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

To search for a patient by Ward:

1. Begin typing the **ward name**. Results will appear on the right side of the screen, generated by your search criteria. Scroll through the results to find the patient name, expand the record to confirm the identified patient by selecting the “+”, or “**plus-sign**” to the right of their name. 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.

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

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

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

5.2.1.1 Appointment Filter
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. Select an appointment from the results to view the Appointment Details.

5.2.1.2 Patient Participant Badge
If a patient has had a Video Visit within the past 2 years, a badge displays with the patient information at the top of the page.

5.2.1.3 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. Traditional and Telephone appointments cannot be managed from VCM.
5.2.1.4 Start a Video Visit
To initiate a video visit, select the Start Video Visit button. This will direct you to the VVC application (Web or iOS, depending on your device type).

5.2.1.5 Cancel Appointment
**Note:** Cancelation is not available for clinic-based and store-and-forward appointments

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

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

2. Indicate who is creating the appointment. The visit information form will default to the Yes radio-button, meaning the appointment is for you, the provider.

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

![Create Video Visit](image)

**a)** Type in the search field and a drop-down will populate based on the characters entered.

![Create Video Visit](image)

**b)** If the characters entered include a typo or for any other reason do not match a name in the system, an error note will appear in the drop-down; adjust as needed to find the correct name.
c) Choose the name from the list and it will be added to the appointment as the care provider.

d) If the name is not found, enter the First Name, Last Name and Email address for the care provider manually.

e) **At this time, continue to one of the following sections** to complete creation of the new appointment:

- If you are creating a Video Visit for one participant, continue to **Step 3** and the following steps in this section, to complete creation of the appointment.
- If you are creating a Video Visit for a Single Veteran (Email Only), return to **Step 5** in **Section 6.1.2 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 6.1.3 Create New Group Video Visit**, to complete creation of the appointment.

Add or verify your contact information.
Indicate whether it will be an ATLAS appointment. The option will default to **No**.
Set the date, time, and duration of the appointment.
The Patient is invited by default. If the appointment is to be held with a Caregiver or other VA Staff, the Patient may not be included. At least one participant beside the Provider must be included to create the video visit.

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.
5.2.3 Create New ATLAS Appointment

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

   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.

   Indicate it will be an ATLAS appointment by choosing the Yes radio-button. The system will default to the No radio-button.
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.
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.

Choose the desired date, and verify it appears as intended.
Select the Create Video Visit button, then confirm creation of the appointment when prompted by selecting the Yes, Create button.

ATLAS Site 1
123 Main Street, Anywhere VA 22222
5.2.4 Resend Video Appointment Information

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

1. Access the Appointment Details view for a patient. (see Section 3.2.1 Upcoming Appointments for more information about navigating to the screen)
Select the **Resend Invite/Edit Email** button for the Resend Video Appointment Information modal to appear.

2. Verify the email displayed, and revise it as needed by selecting the **Edit Email** button.

**Note:** Any saved modifications to the email 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.
3. On the email editing screen, verify whether the updated email should become the default record for all future Video Visits. Select the Send button once the contact information is complete.

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

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

5.2.7 Additional Instructions

Additional Instructions are optional and will be included in the email Notification and Reminders to the Veteran. Additional Instructions have been pre-screened for PII/PHI. Options for Additional Instructions include “Video Visit Preparation” and “Medication Review”.

![Add VA Staff](image)
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

1. Set the date range Filter using the From and To fields, and then select the Update button for upcoming scheduled appointments to appear.
2. Narrow the results down further by using My Email Preferences or Clinics filters, by checking or unchecking the checkboxes for each choice, and selecting the Update button again to modify the scheduled appointments shown.
3. Select an appointment from the results listed below the search filters, to view the Scheduled Appointment Details modal.
6.1.2 Schedule List View
Scheduled appointments for the Provider can be viewed within their Schedule tab. Appointments displayed include TeleHealth, Traditional (In Person), and Telephone.

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

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.

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. If you know the patient is not in the VistA facility, select to Add Manually directly by selecting the radio button, and then enter the patient information.

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

### 6.1.4 Create New Group Video Visit

To create a new Group Video Visit appointment:

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

2. Select the **Create Video Visit** button, and the entry form modal will appear.
3. Select the Group Video radio-button in the Type of Video Visit field.

4. Indicate who is creating the appointment. The visit information form will default to the Yes radio-button, meaning the appointment is for you, the provider.

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

Add or verify your contact information.

Set the date, time, and duration of the appointment.

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

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.
In the Add Veteran modal, verify the patient information appears as intended. Provide an Email and contact Phone number.

Modify the patient email by selecting the **Edit Email** button.
If the email being modified for this group appointment is only needed one time, proceed with adding them to the group by selecting the Add Veteran button. Otherwise, select the checkbox to Update email of record for future Video Visits, if this will be the preferred method of contact going forward.

Select the Create Video Visit button to create a new appointment for the group displayed.
In the Create Appointment modal, confirm by selecting the Yes, Create button. The appointment confirmation modal will display.

If the date of the Video Visit just created is outside the currently filtered Date Range, an alert toast displays at the top right of the page.
<table>
<thead>
<tr>
<th>Schedule</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>e911</td>
<td></td>
</tr>
</tbody>
</table>

**Virtual Care Manager**

**My Workspace**
- Patient Care

**Schedule**

**DATE RANGE**

- From: 08/24/2020
- To: 08/24/2020

[Update]
6.2 Managing Group Participant List

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

1. Select the **Add Veteran** button to access the patient search form. 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 menu will appear, generated by the characters typed in the search field. Enter more characters to narrow the search.

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.
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.

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

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

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

![Details View Image]

6.4.2 Copy Appointment (Create Additional Appointment)

To create a new appointment based on an existing group:

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

Follow the steps in Section 4.1.3 Create New Group Video Visit.
6.4.3 Cancel Appointment
To cancel a group appointment:

2. While on the details screen for the appointment, select the **Cancel** 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.

6.4.4 Resend Video Appointment Information
To resend an invitation for a group appointment, or to adjust the attendee contact information:

1. Access the Appointment Details view for a group appointment. (see Section 4.4.1 Details View for more information)
Select the **Resend Invite/Update Email** button below the participant list, for the Resend Video Appointment Information modal to appear.

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.

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

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.

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.

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

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

### 6.4.5 Remove Group Video Visit Attendees

1. Revise the attendee list for a group video visit, by selecting the “X” on the right side of the name to remove it.
A confirmation modal will appear. Select the Yes, Continue button to complete removal of the participant.

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!**
Enter the location and address of the patient.

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

Check if Address Validated for e911

If the address entered has 911 service, then a green check mark will appear stating:

“The address you entered has been validated for e911”
Emergency Use of e911

In **Callback Phone Number**: Type your own or 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.
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.

Using a landline telephone or mobile phone, call the phone number displayed to connect directly to 911

If address pre-validation is not available, when pre-validate is selected, a general emergency number displays. Call this number to reach 911 services that will contact 911 at the patient’s location.
After Calling e911

After calling e911, submit the following information

- report use of the VCM e911 relay services by following your local facility procedures, and 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.

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

Additional Resources

Further information and guidance are available in the following documents

Virtual Care Manager App Store

VA Telehealth Services Intranet Site for Virtual Care Manager

7. Configuration Tab

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

7.1 ATLAS Support

This menu option allows the ability to view a complete list of ATLAS sites as well as the creation and maintenance of sites. The user (ATLAS Support Admin) will see the option for Sites (selected by default) and Templates.
7.1.1 Sites
All ATLAS Sites will display within the Sites tab. The user can create and maintain meta-data for all ATLAS Sites. Slot availability can be determined and applied to each site as the user is creating or modifying site details.

7.1.1.1 ATLAS Site Filters
a. The filter will default to display all ATLAS Sites that include a status of ‘Active’, ‘Inactive’, and/or ‘Archived’
b. 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.
c. Select a site from the results listed below the search filters, to view that specific site’s details view.

7.1.1.2 Create New ATLAS Site
a. Select the Create New Site button in order to create a new site and enter meta-data for that site.
b. All required fields must be satisfied in order to create the site.
   a. Required fields - Site ID, Site Name, Time Zone, Map Coordinates (longitude/latitude), Physical Street Address, Site Contact Information, Primary POC, Site Status, Is site open on Federal Holiday...?, Number of ATLAS Rooms at Site
b. 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 user can select the Use Existing Template option in order to add a table that includes pre-populated slots (referenced further down). Each table will include one row by default with the following columns:

1. 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.
2. Duration will default to 30 (minutes) and selections can be modified to either 15, 20, 30, or 60.
3. Status will default to Open. User can select Blocked from the dropdown.

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

1. 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).
c. Completing ATLAS site creation (meta-data form)
   a. 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).

TAS SITE CREATED

The following TAS Site has been created.

Site ID: WLM-VA-20151-01
Site Name: ATLAS Site

7.1.1.3 ATLAS Sites List View
The list view for ATLAS sites on the left hand panel will display the status and date range from when that site will be active until (Note: Inactive sites will not include a date range). List view will also display the name and the physical address for a given site.
7.1.1.4 ATLAS Site Details View
The details view for an ATLAS site will be in view once the site on the list view panel is selected. It will display read-only data for that given site provided by the user upon creation.

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

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

Within a site’s details view, there will be a **Slot Status Report** button. Upon selection, the slot status report will be generated to view details for that site’s slot availability on a given date. The generated date will default to today, however the user can change the date 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 as this change was made for a specific date and not for day(s) of the week in general. In addition, when slot status report is updated for slots that were not booked, and afterwards that site’s schedule was updated, then those changes will override the updates made to the slot status report (with exception to booked slots)).
7.1.2 Templates
Templates provide convenience for ease of use across sites. Templates are schedules that can be created in advance in order to apply slot availability to sites for days of the week (for a given room). Any changes to templates on this view will be available on the Sites tab when applying site slot availability for a room on specific days of the week.

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

a. Select the **Create New Template** button in order to create a new template.

b. Required fields – Template Name, Template Description, and Availability.

c. By default one row will display within the Availability table for Start Time, Duration, and Status. User can add or remove slots.
   
   a. Start Time for the slot will default to 08 00 and selections for hour/minute can be adjusted that would take up the 24 hour clock.

   b. Duration will default to 30 (minutes) and selections can be modified to either 15, 20, 30, or 60.

   c. Status will default to **Open**. User can select **Blocked** from the dropdown.

   d. Select the **Create** button when all required fields are satisfied and the template will be created. User will be redirected back to the Templates list view page upon confirming template creation.
7.1.2.3 Templates List View
The list view for templates on the left hand panel will display the template name and description.

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

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

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

h. From the **Select a Template** dropdown field, a list of templates will display to select from.
Select a template from the listing

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

Each table will include the following columns:

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

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

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

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

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

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.