# 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.

1. Add or verify your contact information in the **Contact Info** section.
2. 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.
3. Choose additional clinics if needed.
4. 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

Title: Virtual Care Manager
Version: 2.1.4

The Virtual Care Manager app provides the capability for clinicians to create, manage, and join Video Appointments for Veterans.

Additional Information
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.

![Virtual Care Manager screen with External Apps and Feedback UI buttons]

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.

![Virtual Care Manager screen with Feedback UI button]
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.

2. Scroll through the results to find the name, expand the record to confirm the identified patient by selecting the “+” or “plus-sign” to the right of their name.

3. Confirm by using the **Select button** with their name.
5.1.2 Clinic Search

The default view on the Clinic search screen displays the most recent clinics in a list on the left.

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

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

To search for a patient by Ward:

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

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

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

5.2.1 Upcoming Appointments
Scheduled appointments for a patient can be viewed within their Appointments tab.

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 Appointment Details View
In the Appointment Details, there are appointment management buttons, such as a Resend Notification button for updates to appointments, a Start button for Video Visits, and a Cancel Appointment button.
5.2.1.3 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).

5.2.1.4 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.
Choose the name from the list and it will be added to the appointment as the care provider.

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

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.

3. Add or verify your contact information.
4. Indicate whether it will be an ATLAS appointment. The option will default to No.
5. Set the date, time, and duration of the appointment.
6. Once all required appointment details have been added, select the Create Video Visit button to complete scheduling.

7. 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.

2. Indicate who is creating the appointment. The visit information form will default to the Yes radio-button, meaning the appointment is for you, the provider. If you are not the provider, you will choose the No radio-button to create the appointment for someone else.

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

4. 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.

5. 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.

6. Choose the desired date, and verify it appears as intended.
7. Select the Create Video Visit button, then confirm creation of the appointment when prompted by selecting the Yes, Create button.
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)
2. Select the **Resend Invite/Edit Email** button for the Resend Video Appointment Information modal to appear.

3. 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.
4. On the email editing screen, verify whether the updated email should become the default record for all future Video Visits.
5. Select the **Send** button once the contact information is complete.

5.2.5 **Guests**

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

![VA Staff Invitation Form](image1)

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”.

![Additional Instructions Form](image2)
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

### Schedule Filters

1. Set the date range Filter using the From and To fields, and then select the **Update** button for upcoming scheduled appointments to appear.

2. Narrow the results down further by using My Email Preferences or Clinics filters, by checking or unchecking the checkboxes for each choice, and selecting the **Update** button again to modify the scheduled appointments shown.

3. Select an appointment from the results listed below the search filters, to view the Scheduled Appointment Details modal.
6.1.2 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.

6.1.3 **Create New Group Video Visit**

To create a new Group Video Visit appointment:

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

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

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

5. Add or verify your contact information.

6. Set the date, time, and duration of the appointment.
7. Create a group by adding the Group Name.
8. Establish the group membership by selecting the **Add Veteran** button to reveal the search field.

9. Begin typing all or part of the **patient’s last name** or **Social Security Number (SSN)** (SSN search with or without dashes, OR the “Last Init + SSN Last 4” (e.g., S1234)) in the search field. A drop-down selection list will populate using that criteria.

10. Scroll to search through the results and make a choice or enter more characters to refine the options available. Choose the patient from the list to add them to the group.
11. In the Add Veteran modal, verify the patient information appears as intended. Provide an Email and contact Phone number.

12. Modify the patient email by selecting the **Edit Email** button.
13. 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.
14. Select the **Create Video Visit** button to create a new appointment for the group displayed.

![Create Appointment](image)

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

![Appointment Scheduled](image)
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.
6.2 Managing Group Participant List
The group appointment video visit summary view provides the choices to Add Veterans to the group appointment, or to Resend Appointment Invitations to attendees.

1. Select the **Add Veteran** button to access the patient search form.
2. Begin typing all or part of the **patient’s last name** or **Social Security Number (SSN)** (SSN search with or without dashes, OR the “Last Init + SSN Last 4” (e.g., S1234)) in the search field.
3. A drop-down menu will appear, generated by the characters typed in the search field. Enter more characters to narrow the search.

4. Scroll through the results to find the name, select it, and then select the Update Group button to view the Add Veteran contact information modal.
5. Add, verify, or adjust contact information as needed, then select the Add Veteran button to add the Veteran to the appointment. The name will be added to the list on the appointment details screen.

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.

![Group Appointment Details](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.
2. Follow the steps in Section 4.1.3 Create New Group Video Visit.
6.4.3 Cancel Appointment
To cancel a group appointment:

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

![Cancel Appointment Modal](image)

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)

![Appointment Details View](image)
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.

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

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

5. Verify and adjust emails of other participants, if needed.
Schedule Manage Video Visit. The user can select the check box to resend to all veterans in the group.

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

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

### 6.4.5 Remove Group Video Visit Attendees

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

### 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