



Virtual Care Manager

User Manual



U.S. Department of Veterans Affairs
Veterans Health Administration
Office of Connected Care

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User Manual

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Overview

The Virtual Care Manager mobile application (app) allows U.S. Department of Veterans Affairs (VA) schedulers and clinicians to view, create and start video appointments with patients. Additionally, the app provides access to the Custom Data View and Personal Preferences Applets.

This app is available for iOS, Android and Windows operating systems, and is supported by these Internet browsers:

1. Internet Explorer 10 and higher
2. Safari 7 and higher
3. Firefox 24 and higher
4. Google Chrome 30 and higher

This user manual provides an in-depth, step-by-step guide for using the Virtual Care Manager app.

The Basics

Prerequisites

To use the Virtual Care Manager app, you must have a GFE laptop or desktop with a camera and microphone or a GFE iPad with a PIV waiver. Your patient will need a laptop or desktop with a camera and microphone or any smart phone or tablet. You need to verify that both you and your patient have a proper device prior to booking a video appointment. You can use Patient Viewer on your GFE desktop to book the Video Appointment, but both you and your patient must use a device with a camera and microphone to conduct the video appointment.

Logging in

Access the Virtual Care Manager app > You will arrive at the Single Sign-On Internal (SSOi) Login Screen > Tap **Sign In with VA PIV Card** > Follow the normal process for logging in with a VA PIV Card.

NOTE: Instructions to link your PIV credentials to your VistA account(s) can be found here: <https://mvitkssoi.iam.va.gov/imdquiWeb/provManagedUserLMA.do>

Accessing the VA Launchpad

Tap the four-line menu icon in the upper left corner > A slide-out menu will appear > Tap **Exit** > Tap **Launchpad** from the pop-up window that appears.

Logging out

Tap the four-line menu icon in the upper left corner > A slide-out menu will appear > Tap **Exit** > Tap **Logout** from the pop-up window that appears.

Understanding and switching to Staff View and Patient Context View

You will have two options for viewing information in the Virtual Care Manager app:

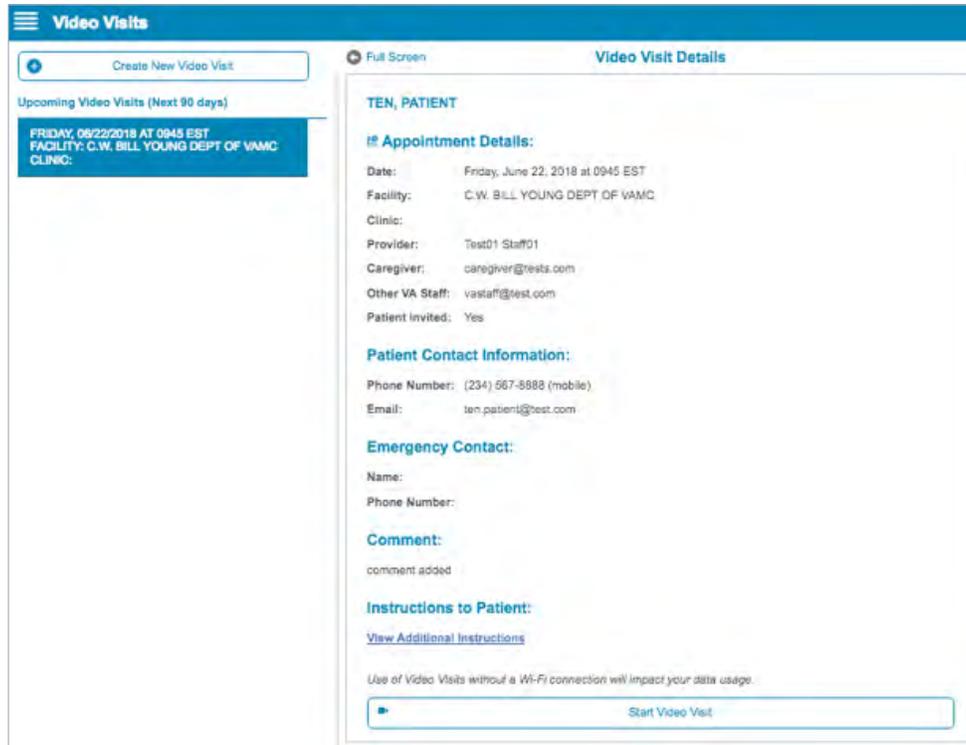
- Patient Context View – View upcoming video visit self-reported health information from apps such as Mobile Kidney for a specific patient. You can create and start video visits as well as access the Custom Data View.
- Staff View – View your upcoming video visits, as well as schedule unenrolled Veteran video visits such as in an emergency situation or someone not at your VA Medical Center (VAMC).

When you first log into the app, your screen will default to the Patient Context View, with the last patient viewed selected. A pop-up Select Patient box will appear, asking you to confirm that you would like to view the most recent patient > Tap **OK** (or the **X** in the upper right corner) to close the pop-up Select Patient box and access the Patient Context screen.

To switch to the Staff View at any time, tap the folder icon with two arrows surrounding it in the upper right corner. You can switch back to the Patient Context View by tapping the icon again. The Patient Context View has a light blue background while the Staff View has a dark blue background, to help you distinguish between the two at a glance.

Patient Context View

View a patient's upcoming video visits and self-entered custom data and create and start video visits. If you are in the Staff View (dark blue background), tap the folder icon with two arrows in the upper right corner to switch to the Patient Context View (light blue background).



Searching for a patient

From the **Patient Context View**, tap the magnifying glass icon in the upper left corner > A Patient Search pop-up box will appear > Search by tapping one of the four tabs at the top of the Search pop-up box:

- **Patient** – Begin typing either a patient's (1) last name, (2) last name and first name, (3) first initial of last name and last four digits of the social security number (with no spaces) or (4) full social security number > A drop-down list of matching patients will appear > Tap the patient whose information you would like to view.
- **Clinic** – Under the Appointment Date heading, either (1) tap **Use Current Date** to choose today's date or (2) tap the button with the date in a MM/DD/YYYY format > A pop-up box will appear > Scroll to select a past month, date and year (**NOTE:** You cannot choose a future date) > Tap **Set** to choose a date, or **X** to close the pop-up box and not select a date. Under the Clinic heading, begin typing in the name of a clinic > A drop-down list of clinics will appear > Tap the clinic you would like to select > A drop-down list of patients with appointments for the selected day at the selected clinic will appear > Tap the patient whose information you would like to view. If you would like to filter the patient list, under the Patient heading that appears, begin typing in the name of a patient.
- **Ward** (inpatient unit) – Begin typing in the name of a ward > A drop-down list of patients currently admitted to the ward will appear > Tap the patient whose information you would like to view. After you have selected a ward, you can further narrow down the list by typing a patient's name in the Filter Patient List bar.

- **Last 20** – A drop-down list of the last 20 patients you selected will appear > Tap the patient whose information you would like to view.

After tapping the name of the patient whose information you would like to view, a pop-up Select Patient box with the patient's overview information will appear > Tap **Select Patient** (or the **X** in the upper right corner to close without selecting) > You will go to the patient's screen with the slide-out menu where you can tap on one of the categories of health care information you would like to view.

Viewing a Veteran's upcoming video appointments

From the **Patient Context View**, make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > You will see all video visit appointments for the patient, which are scheduled within the next 90 days on the left pane of your screen > Tap a visit, and additional details of that visit including date, time, provider, clinic, facility, provider entered comments and any additional instructions selected or entered by the provider will appear in the right pane of your screen. Tap **View Additional Instructions** to see any additional instructions. In the future, all additional instructions will be viewable by the Veteran in VA Online Scheduling, and pre-crafted messages will also be sent in the email with the video visit link.

Creating a new video visit

Schedule a video visit with a patient in Virtual Care Manager and an email with a link to participate will be sent to the Veteran. The video visit may be scheduled to start anywhere from the 15-minute increment prior to the current time to 90 days in advance. From the Patient Context View, make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > Tap **Create New Video Visit**, and a form to create a new video visit will appear in the right pane of your screen.

Confirm or update the following fields in the Create New Video Visit form:

- **Date** – Tap the current date, and type in the date in the form MM/DD/YYYY for which you would like to schedule the video visit.
- **Time** – Tap the blank field next to the date > A pop-up box to select the hour and minute will appear > Scroll to the hour and minute (00, 15, 30 or 45) for which you would like to schedule the video visit > Tap **Set**. To schedule an immediate video visit, tap the quarter hour before the current time, and the video visit can start right away (e.g., If it is 10:31 AM, a user can schedule an appointment for 10:30 AM).
- **Duration** – The default duration for a video visit is 20 minutes. To change the duration, tap the field under Duration, and a drop-down menu will appear > Tap one of the following, 15 minutes, 20 minutes or 30 minutes. The video visit link lasts for 12 hours, and the video visit will not be interrupted if it runs over this time.
- **Provider Email** – To edit, tap the Provider Email field, and type in your email address. **NOTE:** Your email address is not shared with the patient.
- **Provider Phone** – To edit, tap the Provider Phone field, and type in your phone number. **NOTE:** Your phone number is not shared with the patient.
- **Patient Email** – To edit, tap the Patient Email field, and type in the patient's email address.

- **Patient Phone and Phone Type** – To edit, tap the Patient Phone field, and type in the patient’s phone number > Tap the Phone Type field and a drop-down menu will appear > Tap either **Mobile, Home, Work** or **Fax**.
- Patient – To include the patient, tap the check-box next to Invite Patient and enter the Veteran’s email if not already populated.
- Caregiver – Type in the Caregiver’s email.
- Other participating VA staff – Type in the email of any other VA staff you would like to include in the video visit.
- Comments – Type in any comments (up to 250 characters) you would like to include, and which will only be viewable by VA staff.
- Patient Instructions - To include instructions to the patient, tap the circle next to Yes, and tap one of the following:
 - **Medication Review** > A pre-populated message will appear in a text field below, which cannot be modified. This will be sent with the video visit invitation email.
 - **Video Visit Preparation** > A pre-populated message will appear in a text field below, which cannot be modified. This will be sent with the video visit invitation email.
 - **Other** > A blank text field will appear > Type in the instructions you would like to send to the Veteran (up to 1,000 characters). **NOTE:** Due to the potential of including Personally Identifiable Information (PII), the message in Other will not be sent with the video visit invitation email.

In the future, all additional instructions will be viewable by the Veteran in VA Online Scheduling, and pre-crafted messages will also be sent in the email with the video visit link.

If you do not have any instructions for the patient, tap the circle next to No.

Tap **Create** or tap **Cancel** to leave without scheduling a video visit > Once finished, a pop-up Appointment Scheduled box will appear showing all appointment details > Tap **OK** to proceed to the **Patient Context View** screen. The newly created appointment will be selected, and the details will be visible on the right pane of your screen.

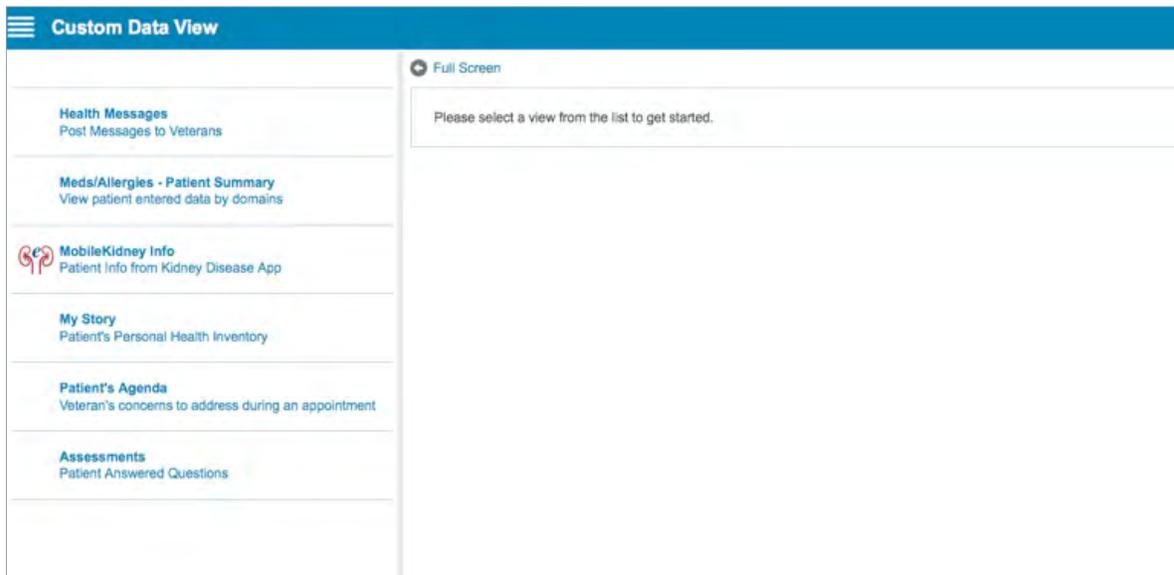
Starting a video from a patient record

From the **Patient Context View**, make sure you have a patient selected, and then tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > You will see all video visit appointments for the patient, which are scheduled within the next 90 days on the left pane of your screen > Tap the visit you would like to begin, and additional details of that visit will appear in the right pane of your screen > Tap **Start Video Visit** > You will leave the Virtual Care Manager app and the video visit will start in your browser or in the VA Video Connect app (learn more about the VA Video Connect app by visiting mobile.va.gov/app/va-video-connect).

Custom Data View

The Custom Data View Applet allows you to see views of the selected Veteran's Self-Entered Data (SED). The applet provides custom views using data from various data sources, including views combining data from different sources. The below sections provide instructions for viewing and working with the main Custom Data View features for the six custom data views available as of March 2018 (i.e., Health Messages; Meds/Allergies – Patient Summary; MobileKidney Info; MyStory; Patient's Agenda; Assessments). Additional custom data views may be added in the future.

For additional information on the Custom Data View Applet, see the built-in User Guide. To access the built-in User Guide, tap the four-line menu icon in the upper left corner of the screen > A slide-out menu will appear > Tap **About** > A pop-up About box will appear > Tap **Additional Information**, and a built-in User Guide will appear > Tap the four-line menu icon in the upper left of the pop-up User Guides box > A slide-out menu will appear > Tap **Custom Data View**.



Viewing and posting health messages

If a Veteran has opted in to receive health message posts in the MyVA Health Journal app, you can view and post health messages. From the **Patient Context View**, make sure you have a patient selected, and then tap the four-line menu icon in the upper left corner of the screen > A slide-out menu will appear > Tap **Custom Data View** > Tap **Health Messages**, and if the patient has chosen to receive health messages, you will see a list of health messages, including the author of the message and the date it was posted. If the patient has not chosen to receive health messages, you will see an “Important: Patient currently not accepting health messages” notification.

You may filter messages by the following:

- **Date** – Tap the date next to Start Date and End Date, and enter the dates in the form MM/DD/YYYY, or tap the date from the pop-up calendar that appears.
- **Keyword** – Type in the keyword you would like to search for. Tap **Update Results**, and the data that meets the specified filter criteria will appear.

To post a message, tap **Post Message** and type in the message (250 characters maximum). Tap **Post Message** to make the message available to the patient, or tap the **X** to close and not post the message.

Viewing medications and allergies

View patient-entered medication and allergy data. From the Patient Context View, make sure you have a patient selected, and then tap the four-line menu icon in the upper left corner of the screen > A slide-out menu will appear > Tap **Custom Data View** > Tap **Meds/Allergies – Patient Summary** > Patient-entered medications with an active status or with either no end date or end dates less than 90 days prior to current date will appear, along with patient-entered allergies > Tap **Expand All** to view details of the medications and allergies, or **Collapse All** to hide the details > You can view only medications or allergies by tapping the checkmark next to either Medications or Allergies and tapping **Update Results**.

Viewing MobileKidney Info

View patient-entered data from the MobileKidney App. From the **Patient Context View**, make sure you have a patient selected, and then tap the four-line menu icon in the upper left corner of the screen > A slide-out menu will appear > Tap **Custom Data View** > Tap **Mobile Kidney Info**, and data the Veteran entered into their Mobile Kidney App will be displayed > To filter the data by date, tap the date next to Start Date and End Date, and enter the dates in the form MM/DD/YYYY, or tap the date from the pop-up calendar that appears > Tap **Update Results**, and the data that meets the specified filter criteria will appear > Tap **Expand All** to view data details, or **Collapse All** to hide the details > A note icon will display if the patient has recorded a note entry > Tap the note to view the details > The MobileKidney App data will default to a table view > To view the data as a graph, tap **Graph**, and to return to the table view, tap **Table**.

Viewing lifestyle information

View the patient’s answers regarding his/her personal health. Make sure you have a patient selected, and then tap the four-line menu icon in the upper left corner of the screen > A slide-out menu will appear > Tap **Custom Data View** > Tap **My Story**, and the following information regarding the Veteran will appear:

- **Personal Values** - Lists the questions and answers regarding the patient’s values, including what matters in his/her life and what brings the patient joy and happiness.
- **Assessment** - Lists the patient’s answers to the personal health assessment based on well-being, self-care and professional care. You may view the assessments as either a graph (by tapping **Graph** from the table view) or a table (by tapping **Table** from the graph view).
- **Reflections** - Lists the question and corresponding answer regarding the patient’s vision for his/her best possible health.
- **Active Goals** - Displays all the patient’s active health goals.

Viewing patient's agenda

View information related to a patient's concerns to be addressed during an appointment and any comments following the visit. Make sure you have a patient selected, and then tap the four-line menu icon in the upper left corner of the screen > A slide-out menu will appear > Tap **Custom Data View** > Tap **Patient's Agenda**, and the patient's agenda will be displayed > You can filter agenda items in three ways:

- **Date** – Either tap the date next to Start Date and End Date, and enter the dates in the form MM/DD/YYYY, or tap the date from the pop-up calendar that appears.
- **Text** – Tap the blank Filter List bar, and type in what you would like to search for.
- **Status** – Tap the check-box next to Scheduled, Desired, Cancelled or Completed.

Tap **Update Results**, and the patient's agenda items will update based on the filters > Tap an agenda item to view details including pre-visit questions and the patient's corresponding answers as well as the patient's notes regarding the completed visit, if applicable.

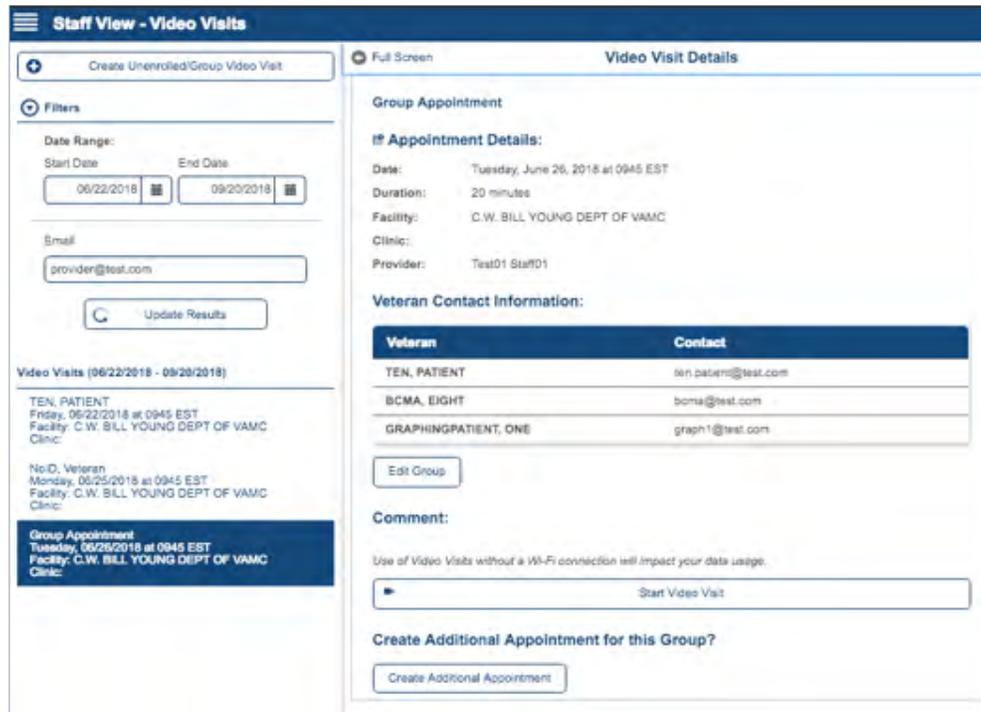
Viewing Veteran self-assessments

View Veteran self-assessments taken by Veterans. Make sure you have a patient selected, and then tap the four-line menu icon in the upper left corner of the screen > A slide-out menu will appear > Tap **Custom Data View** > Tap **Assessments**, and the patient's assessments will be displayed > You can filter assessments in the following ways:

- **Date** – Either tap the date next to Start Date and End Date, and enter the dates in the form MM/DD/YYYY, or tap the date from the pop-up calendar that appears.
- **Text** – Tap the blank Filter List bar, and type in what you would like to search for. Tap **Update Results**, and patient's assessments will update based on the filters > Tap an assessment to view details including health status assessment, hospital admission care assessment and outpatient care assessment.

Staff View

View your upcoming video visit appointments, start videos, create visits and edit personal preferences. If you are in the **Patient Context View** (light blue background), tap the folder icon with two arrows in the upper right corner to switch to the Staff View (dark blue background).



Viewing your upcoming and past video visits

From the **Staff View**, tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > You will see all of your upcoming video visit appointments for the next 90 days on the right pane of your screen > You can filter assessments in the following ways:

- **Date** – Either tap the date next to Start Date and End Date, and enter the dates in the form MM/DD/YYYY, or tap the date from the pop-up calendar that appears. To view a history of your video visits, select a past start date > Tap **Update Results**.
- **Email** – Type in the email you want to search for > Tap **Update Results**.

Tap a video visit to see additional details including date and time, facility, provider, attendees and any comments made by a provider about the video visit. From the appointment details screen you can:

- **Edit the attendees** – Tap **Edit Group** > Type in the email address of the person you would like to add, or delete the email of the person who you like to remove from the video visit.
- **Start the video visit** – Tap **Start Video Visit**. The VA Video Connect App will open to begin the visit. See the Starting a video section of the user manual for more information about starting a video visit.
- **Create an additional appointment** – Tap **Create Additional Appointment** > Enter the date, time and duration of the video visit. See the Creating a new video visit section of the user manual for additional details on creating a new video visit.

Starting a video

From the **Staff View**, tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > You will see all video visit appointments for the patient which are scheduled within the next 90 days on the right pane of your screen > Tap the visit you would like to begin, and additional details of that visit will appear in the right pane of your screen > Tap **Start Video Visit** > You will leave the Virtual Care Manager app and the video visit will start in your browser or in the VA Video Connect app (learn more about the VA Video Connect app by visiting mobile.va.gov/app/va-video-connect).



Creating an unenrolled Veteran video visit

To create an unenrolled Veteran video visit, such as in an emergency situation or someone not at your VAMC, from the **Staff View**, tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > Tap **Create Unenrolled/Group Video Visit** > Tap the circle next to Unenrolled Veteran > Tap either the date next to Start Date and End Date, and enter the dates in the form MM/DD/YYYY, or tap the date from the pop-up calendar. The video visit may be scheduled to start anywhere from the 15-minute increment prior to the current time to 90 days in advance > To change the duration (default is 20min), tap the field under Duration, and a drop-down menu will appear > Tap 15, 20 or 30 minutes > Verify your email address and phone number > Type in the unenrolled Veteran's email, phone number, phone type and first and last names > In the Comments field, type in any comments you have about the video visit (up to 250 characters), and which will only be viewable by VA staff > Tap **Create** to schedule the meeting and send out the invitations by email, or tap **Cancel** to exit without creating the video visit.

Creating a group Veteran video visit

From the **Staff View**, tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Video Visit** > Tap **Create Unenrolled/Group Video Visit** > Tap the circle next to Group of Veterans > Tap either the date next to Start Date and End Date, and enter the dates in the form MM/DD/YYYY, or tap the date from the pop-up calendar > To change the duration (default is 20min), tap the field under Duration, and a drop-down menu will appear > Tap 15, 20 or 30 minutes > Verify your email address and phone number > To add Veterans, tap **Edit Group** and a pop-up Group Veteran search will appear > In the Add Veteran field, type in the name or SSN of one Veteran you are adding > Tap **Update** > A list of Veterans matching your search will appear > Tap the Veteran you would like to add to the video visit. You may include up to 10 Veterans in the video visit, but at least one is required. A Veteran that is already added to the group video visit will not appear in further searches, and you will not be able to add VA staff > In the Comments field, type in any comments you have about the video visit (up to 250 characters), and which will only be viewable by VA staff > Tap **Create** to schedule the meeting and send out the invitations by email, or tap **Cancel** to exit without creating the video visit. You may return and edit the group video visit at any time by selecting the video visit and editing the date, time duration and participants as you would normally.

To create a group video visit with the same duration and participants, select the group video visit you would like to clone > Tap **Create Additional Appointment** > Select the date and time for the new appointment > The duration and participants will auto-populate, but you may edit both as you would normally when creating a group video visit > Tap **Create**.

The screenshot shows the 'Staff View - Video Visits' interface. On the left, there's a sidebar with a menu icon and a 'Filters' section containing 'Date Range' (Start Date: 06/22/2018, End Date: 09/20/2018) and an 'Email' field (provider@test.com) with an 'Update Results' button. Below this is a 'Video Visits (06/22/2018 - 09/20/2018)' section listing two appointments: 'TEN PATIENT' and 'No ID, Veteran'. The main area is titled 'Create Unenrolled/Group Video Visit' and contains a 'Create Video Visit for' section with radio buttons for 'Unenrolled Veteran' and 'Group of Veterans' (selected). It has fields for '* Date' (06/22/2018), '* Time (EST)', and '* Duration' (20 minutes). Below is 'My Information' with fields for '* Email' (provider@test.com) and 'Phone' ((234) 557-8900). A 'Veterans' section includes a table with columns 'Veteran' and '* Contact', an 'Edit Group' button, and a 'Comments' section (viewable only by VA Staff) with a text area and '250 characters remaining'. At the bottom are 'Cancel' and 'Create' buttons.

Editing your personal preferences

From the **Staff View**, tap the menu button with a four-line icon > A slide-out menu will appear > Tap **Personal Preferences** > Update your VA email, additional email and mobile phone number > Tap the checkmark next to either Yes or No to indicate if you would like Virtual Care Manager to send you reminders on upcoming appointment. If you choose to receive appointment reminders, tap the checkbox next to Day of or five (5) minutes prior to appointment. To change the time zone from the default of Eastern, tap the bar under time zone and tap your time zone > Tap **Save** to update your preferences or **Cancel** to exit without saving your changes.

The screenshot shows the 'Personal Preferences' interface. At the top, it says 'Personal Preferences' and shows a calendar icon with 'Friday 8/22/2018 9:58'. Below is a note: 'These settings determine when you will receive reminders about your appointments. Changes to these settings will affect all appointments going forward.' There are three input fields: '* Primary Email Address (VA)' (smith@va.gov), 'Additional Email' (smith@example.com), and 'Mobile Phone (for SMS text)' ((909) 999-9999). Below these is a section 'Send me reminders on upcoming appointments' with radio buttons for 'Yes' and 'No' (selected). At the bottom right are 'Save' and 'Cancel' buttons.

Help and Additional Information

Additional Training Materials for the Virtual Care Manager app

More resources, such as a Slideshow and FAQs are available at mobile.va.gov/appstore, and search for the app to access the resources.

Help Desk Information

If you need help with the Virtual Care Manager App, dial **1-844-482-6624** to speak with a VA representative. The Help Desk is open Monday through Saturday from 7 a.m. to 7 p.m. CT. For TTY assistance, dial **711**.

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 locate your local VA facility, visit VA's Facility Locator: <http://www.va.gov/directory/guide/home.asp?isflash=1>. 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.

Appendices

Appendix #1: Project References

This app was developed according to an approved concept paper. The app was tested in a demo environment to ensure optimal functionality.

Appendix #2: Glossary

App – An application, or software program, that can be accessed through a website or mobile device and is designed to fulfill a particular purpose.

DOB – Date of birth

PII – Personally identifiable information

SSN – Social security number

VA – Department of Veterans Affairs

VA Mobile Health – An initiative that aims to improve Veterans' health by providing technologies to expand care beyond the traditional office visit and that includes the creation of secure mobile apps to leverage the popularity of wireless technologies to support Veterans, Caregivers and VA care teams. [More at: mobile.va.gov]

VistA – Veterans Health Information Systems and Technology Architecture

VS GUI – VistA Scheduling Graphical User Interface