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# INTRODUCTION/OVERVIEW

This document is a User's Guide for the Online Scheduling software tool that provides you, the Vocational Rehabilitation Counselor (VRC), with the steps necessary to operate the online scheduling tool located on the <http://www.VetSuccess.gov> webpage. This tool should help reduce the time spent on the phone with Veterans to establish counselor appointment times. With this tool you define your available appointment times that your Veterans can choose from when they go online and make an appointment request through the tool. This User's Guide will also show you the steps necessary to accept or reject counseling appointment sessions submitted by a Veteran. Caveat, the Counselor/Veteran names and emails are fictitious accounts and used in this training material for reference only.

# HOW TO LOG IN

This section contains a series of screen captures showing you the 5 steps necessary to log in and access the Symplicity Online Scheduling tool.

## Getting Started – Homepage and logging in

Home - VetSuccess: In Transition | At Work | On Campus | At Home | In the Community | For the V - Windows Internet Explorer

http://www.vetsuccess.gov/

**STEP 1:**  
Enter <http://www.vetsuccess.gov> in your browser.

VetSuccess Tips

**JOB APPLICATION TIPS**  
Learn how to make a good impressions with successfully completed Job Applications.  
Job Applications | Sample Employment Application Form | More Tips

**INTERVIEW TIPS**  
Receive tips and suggestions that lead to successful job interviews.  
Common Questions | What to Do When it's Done | More Tips

**RESUME & COVER LETTER TIPS**  
Learn how to write the best resume and cover letter for any position.  
What is a Resume? | What is a Cover Letter? | More Tips

Interested in applying for VetSuccess services?

- Apply Online or print an application to apply in person at your local VetSuccess Office.
- Find the VetSuccess Office closest to you.
- National VetSuccess Employment Coordinators list

CONNECT WITH VA!

Blog Facebook Twitter Flickr Youtube

Need more information about VocRehab and VR&E? | **VA Staff Log-in**

**eBenefits**  
My Gateway to Benefit Information

**VA for VETS**  
YOUR GATEWAY TO VA CAREERS

**National Resource Directory**  
www.nationalresourcedirectory.gov

Done

Internet 100%

# Logging in with Pilot Provided UserID and Password

The screenshot shows a Windows Internet Explorer browser window displaying the VA CSM login page. The browser's address bar shows the URL <https://va-csm.symlicity.com/manager/>. The page header includes the logo for VETSUCCESS.GOV and the text 'CAREER SERVICES MANAGER powered by symlicity'. The main content area features three input fields: 'E-mail Address', 'Password', and a 'Login' button. Each field and the button are circled in red. Three callout boxes provide instructions: 'STEP 3: Enter your VA email address.' points to the email field, 'STEP 4: Enter your password provided.' points to the password field, and 'STEP 5: Left mouse click 'Login'.' points to the login button. A larger callout box at the bottom left contains a note about email notifications for pending schedule requests.

The previous step will bring you to a new web page to login and enter the online appointment scheduling tool.

**STEP 3:**  
Enter your VA email address.

**STEP 4:**  
Enter your password provided.

**STEP 5:**  
Left mouse click 'Login'.

**NOTE:**  
All Veterans that have submitted a Pending schedule request since your last login will receive an email that their appointment request has been received immediately after you have logged in.

# **HOW TO REGISTER/BUILD VETERAN ACCOUNTS**

This section contains a series of screen captures showing you the 31 steps necessary to build new accounts for participating Veterans, assign them to you as a VRC, and provide them Use Appointment user rights to enable them usage of the scheduling tool.

# Register/Build a Veteran Account

The screenshot shows the VetSuccess.gov website in a Windows Internet Explorer browser window. The address bar contains the URL <http://www.vetsuccess.gov/>, which is circled in red. A red-bordered box on the left contains the following text:

**STEP 1:**  
Close all existing VetSuccess.gov windows. In a new browser window, enter <http://www.vetsuccess.gov/>.

The website content includes a navigation menu with 'Additional Resources', 'VA, VR&E, and VetSuccess', 'News', and 'For Employers'. Below this are buttons for 'BROWSE VETSUCCESS JOBS' and 'JOB TOOLS & TIPS'. The main content area is divided into three sections: 'VETSUCCESS NEWS' with two news items, 'YOUR JOB SEARCH STARTS HERE!' with a play button, and 'MEMBER LOGIN'. The 'MEMBER LOGIN' section has a 'SUBMIT' button and a link 'No Login? Register for a free account', which is circled in red. A second red-bordered box at the bottom right contains the following text:

**STEP 2:**  
Left mouse click on 'Register for a free account'.

The Windows taskbar at the bottom shows the Start button, several open applications (VRCTraining, OnlineSchedVRCTrng, Home - VetSuccess, Draft Deliverables), and the system tray with the time 6:57 PM.

# Register/Build a Veteran Account

What type of user are you? | VA CSM - Windows Internet Explorer

https://va-csm.symlicity.com/

File Edit View Favorites Tools Help

What type of user are you? | VA CSM

WELCOME TO  
VETSUCCESS.GOV

eBenefits  
My Gateway to Benefit Information

software by symlicity™

What type of user are you?

Veteran

Employer

**STEP 3:  
Left mouse click on 'Veteran'.**

Career Services Management

Simplicity Privacy Policy

Internet 100% 6:59 PM

# Register/Build a Veteran Account

The screenshot shows a web browser window displaying the VETSUCCESS.GOV website. The page is titled "Sign in" and features a "Register" button circled in red. A red box highlights the instruction: "STEP 4: Left mouse click on 'Register'". The page includes a "Privacy Policy" section and a "Log In" section with fields for "Username" and "Password".

**STEP 4:**  
Left mouse click on 'Register'.

# Register/Build a Veteran Account

Register | VA CSM - Windows Internet Explorer

https://va-csm.simplicity.com/students/index.php?signin\_tab=2

File Edit View Favorites Tools Help

Register | VA CSM

WELCOME TO VETSUCCESS.GOV

eBenefits My Gateway to Benefit Information

Register

Sign in Forgot my password Register

Veteran Registration

Full Name\*: Enter your full name (first mi last)  
new 7 window

First: new

MI: 7

Last: window

Email\*:

Submit

STEP 5:  
Enter the Veterans full name and hit the TAB key.  
This will auto-populate the three names fields.

STEP 6:  
Enter the Veterans email address.

STEP 7:  
Left mouse click on 'Submit'.

Done

start OnlineSchedVRCTrng ... Register | VA CSM - ...

Internet 75%

7:06 PM

# Register/Build a Veteran Account

Register | VA CSM - Windows Internet Explorer

https://va-csm.symphlicity.com/students/index.php?signin\_tab=2

File Edit View Favorites Tools Help

Register | VA CSM

WELCOME TO VETSUCCESS.GOV

Register

Sign in Forgot my password Register

Your registration has been received. An email will shortly be sent to your email to verify validity of your email address. Your email address must be verified in order to access the system.

Career Services Management System [Symphlicity Privacy Policy](#)

**STEP 8:  
Close the browser window completely.**

Done Internet 75% 7:08 PM

# Register/Build a Veteran Account

The screenshot shows the VetSuccess website in a Windows Internet Explorer browser window. The address bar contains the URL <http://www.vetsuccess.gov/>, which is circled in red. A red-bordered box on the left contains the text: **STEP 9:** In a new browser window, enter <http://www.vetsuccess.gov/>. The website content includes a login form with fields for Username and Password, and a 'SUBMIT' button. Below the login form is a 'VetSuccess Tips' section with sub-sections for Job Application Tips, Interview Tips, and Resume & Cover Letter Tips. At the bottom of the page, there is a 'VA Staff Log-in' link, which is also circled in red. A second red-bordered box on the right contains the text: **STEP 10:** Left mouse click on 'VA Staff Log In'. The browser's taskbar at the bottom shows the Start button and several open applications, including 'OnlineSchedVRCTrng ...' and 'Home - VetSuccess: I...'. The system tray shows the time as 7:10 PM.

# Register/Build a Veteran Account

The screenshot shows a Windows Internet Explorer browser window displaying the VA CSM login page. The page header includes the VETSUCCESS.GOV logo and the text 'CAREER SERVICES MANAGER powered by simplicity'. The main content area contains three input fields: 'E-mail Address', 'Password', and a 'Login' button. Three red boxes with white text provide instructions for each field:

- STEP 11:** Enter your VA email address.
- STEP 12:** Enter your password provided.
- STEP 13:** Left mouse click 'Login'.

The browser's address bar shows the URL <https://va-csm.simplicity.com/manager/>. The Windows taskbar at the bottom shows the Start button and several open applications, including 'OnlineSchedVRCTrng ...', 'Home - VetSuccess: I...', and 'VA CSM - Windows In...'. The system tray on the right shows the Internet icon, a volume icon, and the time 7:12 PM.

# Register/Build a Veteran Account

The screenshot shows the VA CSM website interface. The left sidebar contains a navigation menu with the following items: Home, Announcements, Calendar, Contacts, Professional Network, Employers, Survey, Veterans, Counseling, Placements, Job Postings, Events, Resume Book, Quick View Reports, Resume Builder, Publications, Reporting, Document Library, Tools (circled in red), and My Account. The main content area is titled 'CSM Staff Home' and features several sections: 'ANNOUNCEMENTS' with a sub-section for the 'Army Wounded Warrior Program (AW2)', 'Marine Corps Wounded Warrior Regiment', and 'Navy Safe Harbor'; 'PENDING ACTIONS SUMMARY' with a table of counts for 'New Employer Registrations' (285), 'New Information Session Request' (0), and 'Assigned to Me / All Pending Appointments' (0/0); 'CSM STATISTICS' as of 6:57 PM with counts for 'Registered Employers' (2903), 'Registered Employer Contacts' (3756), 'Registered Veterans' (137312), 'Veterans resumes viewable to employers' (16331), 'Veterans resumes not viewable to employers' (996), 'Job Postings' (2828), and 'Scheduled Information Sessions' (0); and 'SHORTCUTS' with links to create new contacts, employers, veterans, jobs, information sessions, and workshops. A calendar for May 2012 is also visible. A red box highlights the text: **STEP 14:**  
**Left mouse click 'Tools'.**

# Register/Build a Veteran Account

VA CSM - Windows Internet Explorer

https://va-csm.symlicity.com/manager/?s=tools&ss=usersgroups&\_lsl=1

VETSUCCESS.GOV CAREER SERVICES MANAGER powered by symlicity

Tuesday, May 22, 2012 | 7:14 pm | Lyron Blum-Evitts Logout

Home Announcements Calendar Contacts Professional Network Employers Survey Veterans Counseling Placements Job Postings Events Resume Book Quick View Reports Resume Builder Publications Reporting Document Library Tools Users/Groups Picklists Quicklinks Import Data

CSM Staff Users/Groups back

Users Groups

Keywords searches user name and email address

Apply Search Clear Save Defaults

+ Add New Items 1-20 of 1419 Showing 20 per page Page 1

Full Name	Email	User Rights/Groups	Last Modified
A. Fernando Mattos	alberto.mattos@va.gov	Administrator (super user) St. Petersburg RO 317: Administrator (No Tools)	12/01/2007 03:20:00 pm
A.J. FELDMAN	Arnold.Feldman1@va.gov	Announcements (Create), Announcements (Edit), Contacts (Account/Password Management), Contacts (Create), Contacts (Edit), Login As Employer, Employers (Create), Employers (Edit), Non-OCR Postings (Approve), Non-OCR Postings (Create), Non-OCR Postings (Edit), Non-OCR Postings (View), OCR Position Assignments (Approve), OCR Positions (Edit), Resume Books (Create), Resume Books (Edit), Administrator (No Tools), Veteran (Account/Password Management), Veterans (Create), Veteran (Edit), Veteran Activity (Create/Edit), Login As Veteran, Veteran Profile (Edit) Wichita RO 452: Administrator (No Tools)	10/28/2009 08:43:00 am
aaron hackwith	aaron.hackwith@va.gov	Counseling / Advising - Mine Only, Counseling / Advising - Full Access, Administrator (No Tools) Seattle RO 346: Administrator (super user), Administrator (No Tools)	08/20/2009 10:39:00 am
Aaron Pugh	Aaron.pugh@va.gov	Announcements (Create), Announcements (Edit), Contacts (Account/Password Management), Contacts (Create), Contacts (Edit), Contacts (Bulk Mail), Contact Invoices (Create), Contact Invoices (Edit), Login As Employer, Employers (Create), Employers (Edit), Staff Events (Create), Staff Events (Edit), Non-OCR Postings (Approve), Non-OCR Postings (Create), Non-OCR Postings (Edit), Non-OCR Postings (View), OCR Position Assignments (Approve), OCR Positions (Edit), Resume Books (Create), Resume Books (Edit), Administrator (super user), Administrator (No Tools), Veteran (Account/Password Management), Veterans (Create), Veteran (Edit), Veteran Activity (Create/Edit), Login As Veteran, Veteran Profile (Edit) Denver RO 339: Administrator (No Tools)	12/07/2009 11:44:00 am
		Administrator (super user)	04/03/2008 01:12:00 pm
		Announcements (Create), Announcements (Edit), Contacts (Account/Password Management), Contacts (Create), Contacts (Edit), Contact Invoices (Create), Counseling / Advising - Mine Only, Counseling / Advising g, Counseling / Advising - Full Access, Counseling / Advising - View Only, Login As Employer, Employers (Create), Employers (Edit), Staff Events (Create), Staff Events (Edit), Non-OCR Postings (Approve), Non-OCR Postings (Create), Non-OCR Postings (Edit), Non-OCR Postings (View), Reports (manage), Reports (run), Resume Books (Create), Resume Books (Edit), Administrator (No Tools), Veteran (Account/Password Management), Veteran Coops (Create/Edit), Veterans (Create), Veteran (Edit), Veteran Activity (Create/Edit), Login As Veteran, Veteran Profile (Edit)	05/17/2011 08:24:00 am
		Administrator (super user)	07/20/2009

STEP 15:  
Left mouse click  
'Users/Groups'.

Internet 75% 7:14 PM

# Register/Build a Veteran Account

The screenshot shows the VA CSM web application interface. The browser title is "VA CSM - Windows Internet Explorer" and the URL is "https://va-csm.symplicity.com/manager/index.php". The page header includes "VETSUCCESS.GOV CAREER SERVICES MANAGER powered by symplicity". The left sidebar contains a navigation menu with items like Home, Announcements, Calendar, Contacts, etc. The main content area is titled "CSM Staff Users/Groups" and has a search bar with the text "thomas" entered. Below the search bar are buttons for "Apply Search", "Clear", and "Save Defaults". A table below shows search results, with the first entry "George Thomas" highlighted. Three red boxes with white text provide instructions: Step 16 points to the search bar, Step 17 points to the "Apply Search" button, and Step 18 points to the name "George Thomas" in the search results table.

**STEP 16:**  
Enter characters of YOUR name. The more the better to minimize the number of entries coming back from the search.

**STEP 17:**  
Left mouse click 'Apply Search'.

**STEP 18:**  
Left mouse click on your name.

# Register/Build a Veteran Account

VA CSM - Windows Internet Explorer

https://va-csm.symplicity.com/manager/index.php?section=counseling

File Edit View Favorites Tools Help

VA CSM

VETSUCCESS.GOV  
CAREER SERVICES MANAGER powered by symplicity

Tuesday, May 22, 2012 | 7:18 pm | Lyrone Blum-Evitts Logout

CSM Staff Users/Groups back

Users Counseling Groups

Keywords searches user name and email address

Apply Search Clear Save Def

+ Add New Items 1-9 of 9

Showing 20 per page | Page 1

Last	First	Email	Options
accounts	sample	sample@me.com	Remove Student
account	ken		Remove Student
Adams	Wanda		Remove Student
Harvey	George		Remove Student
Neal	Lou		Remove Student
Neal	Louis		Remove Student
Tests			Remove Student
Thomas			Remove Student
Thomas			Remove Student

Home Announcements Calendar Contacts Professional Network Employers Survey Veterans Counseling Placements Job Postings Events Resume Book Quick View Reports Resume Builder Publications Reporting Document Library Tools Emails Users/Groups System Settings Picklists Quicklinks Import Data

Internet 75% 7:19 PM

start OnlineSchedVRCTrng ... Home - VetSuccess: I... VA CSM - Windows In...

A list of Veterans currently assigned to you in the Symplicity tool will appear.

Email address' of Veterans assigned to you

STEP 19:  
Left mouse click on '+Add New'.

# Register/Build a Veteran Account

The screenshot shows the VA CSM website interface. The browser window title is "VA CSM - Windows Internet Explorer". The address bar shows the URL: <https://va-csm.symplicity.com/manager/index.php?cmode=form&cid=>. The page header includes the "VET SUCCESS.GOV" logo and "CAREER SERVICES MANAGER" text. The main content area is titled "CSM Staff Users/Groups" and has tabs for "Users", "Counseling", and "Groups". Under the "Counseling" tab, there is a "Choose Student" section with a "Student:" label and a dropdown menu currently showing "[select]". To the right of the dropdown is a "Go" button. Both the dropdown menu and the "Go" button are circled in red. A red-bordered text box on the right contains the following text:

**STEP 20: Enter characters of the Veterans name in the box immediately left of the 'Go' button. The more the better to minimize the number of entries coming back from the search.**

Below this, another red-bordered text box contains the following text:

**STEP 21: Left mouse click on 'Go'.**

The Windows taskbar at the bottom shows the Start button, several open applications, and the system tray with the time 7:20 PM.

# Register/Build a Veteran Account

The screenshot shows the VA CSM website interface. The browser title is "VA CSM - Windows Internet Explorer" and the URL is "https://va-csm.symlicity.com/manager/index.php?cmode=form&cid=". The page header includes the "VETSUCCESS.GOV" logo and "CAREER SERVICES MANAGER powered by symlicity". The main content area is titled "CSM Staff Users/Groups" and has tabs for "Users", "Counseling", and "Groups". Under the "Users" tab, there is a "Choose Student" section with a "Student:" label and a dropdown menu. The dropdown menu is currently open, showing a list of matches, with the top item "new 7 window" circled in red. Below the dropdown menu is a "Submit" button, also circled in red. A red box with white text next to the dropdown menu reads: "STEP 22: Select your Veteran from the list of matches to your search input." Another red box with white text next to the "Submit" button reads: "STEP 23: Left mouse click 'Submit'." The left sidebar contains a navigation menu with items like Home, Announcements, Calendar, Contacts, Professional Network, Employers, Survey, Veterans, Counseling, Placements, Job Postings, Events, Resume Book, Quick View Reports, Resume Builder, Publications, Reporting, Document Library, Tools, Emails, Users/Groups, System Settings, Picklists, Quicklinks, and Import Data. The "Users/Groups" item is highlighted. The bottom of the page shows the Windows taskbar with the Start button and several open applications.

# Register/Build a Veteran Account

The screenshot shows the VA CSM interface in Internet Explorer. The browser address bar displays <https://va-csm.simplicity.com/manager/index.php?>. The page title is "VA CSM". The main content area is titled "VETSUCCESS.GOV CAREER SERVICES MANAGER" and "powered by simplicity". The user is logged in as "Lyron Blum-Evitts" on Tuesday, May 22, 2012, at 7:23 pm. The "Users" tab is selected, and the "Counseling" sub-tab is active. A search bar is present with the text "Keywords: searches user name and email address." Below the search bar are buttons for "Apply Search", "Clear", and "Save Defaults". A table lists staff users with columns for "Last", "First", "Email", and "Options". The "newwindow7@gmail.com" entry is circled in red. A text box points to the email column, and a red-bordered box contains instructions for the veteran.

Last	First	Email	Options
accounts	sample		Remove Student
account	ken		Remove Student
Adams	Wanda		Remove Student
Harvey	George		Remove Student
Neal	Lou		Remove Student
Neal	Louis		Remove Student
Tests	Suzie		Remove Student
Thomas	George		Remove Student
Thomas	Harvey		Remove Student
newwindow	new	newwindow7@gmail.com	Remove Student

Email address' of Veterans assigned to you

The Veteran should now show up in the list of Veterans assigned to you in the Simplicity tool.

# Register/Build a Veteran Account

**STEP 24:**  
**Left mouse click 'Veterans'.**

	Last	First	Employment Track	Station/RO#	Email	Case Status	resume	Status	Logins	Email Verified
<input type="checkbox"/>	A	david			<a href="mailto:dmhd4ic@yahoo.com">dmhd4ic@yahoo.com</a>			(disabled)	0	✘
<input type="checkbox"/>	A	Mark		320- Nashville, TN	<a href="mailto:mark_bussell@us.army.mil">mark_bussell@us.army.mil</a>				2	✔
<input type="checkbox"/>	A	tamara			<a href="mailto:tamara.a.taylor@us.army.mil">tamara.a.taylor@us.army.mil</a>				n/a	✔
<input type="checkbox"/>	A	Vince			<a href="mailto:vaspricick@cessana.textron.com">vaspricick@cessana.textron.com</a>				1	✔
<input type="checkbox"/>	A.Martin	Stacy,			<a href="mailto:stacy_martin24@yahoo.com">stacy_martin24@yahoo.com</a>			(disabled)	0	✘
<input type="checkbox"/>	A.Wall	Sharon		307- Buffalo, NY	<a href="mailto:saw_@wall@yahoo.com">saw_@wall@yahoo.com</a>				2	✔
<input type="checkbox"/>	A	Bulotovich,			<a href="mailto:patrick.bulotovich@us.army.mil">patrick.bulotovich@us.army.mil</a>			(disabled)	0	✘
<input type="checkbox"/>	A	Negron-Santiago		355- San Juan, PR	<a href="mailto:negronrafael@hotmail.com">negronrafael@hotmail.com</a>				3	✔

# Register/Build a Veteran Account

The screenshot shows the VA CSM website in Internet Explorer. The page title is "VA CSM - Windows Internet Explorer" and the URL is "https://va-csm.symlicity.com/manager/index.php". The website header includes "VETSUCCESS.GOV CAREER SERVICES MANAGER" and a date "Tuesday, May 22, 2012 | 7:26 pm | Lyrion Blum-Evitts". The main content area is titled "Veterans" and features a search box with the text "Keywords searches veteran name and email address". Below the search box is an "Apply Search" button. A table of search results is displayed, with columns for "Last", "Case Status", "resume", "Status", "Logins", and "Email Verified". The table contains several rows of data, including names like "Aderhold", "Ashwood", "Higgins", "Mays", and "Watson".

**STEP 25:** Enter characters of the Veterans name in the search box. The more the better to minimize the number of entries coming back from the search.

**STEP 26:** Left mouse click 'Apply Search'.

**STEP 27:** Left mouse click the Last name of the Veteran you just entered.

Last	Case Status	resume	Status	Logins	Email Verified
Aderhold	319- Columbia, SC			1	✓
Ashwood				0	✗
Higgins	339- Denver, CO			1	✓
Mays			(disabled)	0	✗
Watson			(disabled)	0	✗
window			(disabled)	0	✗

# Register/Build a Veteran Account

The screenshot shows the VA CSM (Veteran Career Services Manager) interface in a Windows Internet Explorer browser. The browser address bar shows the URL: <https://va-csm.symplicity.com/manager/index.php?subtab=account>. The page header includes the VETSUCCESS.GOV logo and the text "CAREER SERVICES MANAGER powered by symplicity". The date and time are "Tuesday, May 22, 2012 | 7:28 pm" and the user is logged in as "Lyron Blum-Evitts".

The main content area is titled "new 7 window" and has several tabs: "Core", "Professional Network", "Documents", "Counseling", "Employment", "Activity", and "Login As". The "Account" sub-tab is highlighted with a red circle. Below the tabs, there are buttons for "Submit", "Save", and "Cancel".

The "Authentication" section contains the following fields:

- Account Disabled\*
- Account Blocked\* (with a note: "Selecting 'yes' here will prevent veteran from participating in any recruitment activities" and radio buttons for "Unblocked", "Blocked", and "Soft Block")
- Account expires on (with a date input field)
- User Rights (with a note: "These rights determine which modules the veteran can use. If none selected, veteran will have all rights.")

The "User Rights" section has several checkboxes, with "Use Appointments" checked and circled in red:

- View Personal/Academic Profile
- Edit Personal/Academic Profile
- Upload Documents
- Participate In Opt-In Resu...
- View Employers
- Use Jobs
- Use ProNet
- Use Placements
- Use Events
- Use Calendar
- Use Appointments

Two red boxes with white text provide instructions:

- STEP 28:** Left mouse click the 'Account' sub-tab.
- STEP 29:** Left mouse click the 'Use Appointments' check box.

The Windows taskbar at the bottom shows the Start button, several open applications, and the system tray with the time "7:29 PM".

# Register/Build a Veteran Account

VA CSM - Windows Internet Explorer

https://va-csm.symplicity.com/manager/index.php?subtab=account

File Edit View Favorites Tools Help

VA CSM

Account Disabled\*  
Selecting 'yes' here will allow login of the veteran.  
 Yes  No

Account Blocked\*  
Selecting 'yes' here will prevent veteran from participating in any recruitment activities.  
 Unblocked  Blocked  Soft Block

Account expires on

User Rights  
These rights determine which modules the veteran can use. If none selected, veteran will have all rights.  
 View Personal/Academic Profile  
 Edit Personal/Academic Profile  
 Upload Documents  
 Participate In Opt-In Resume Book  
 View Employers  
 Use Jobs  
 Use ProNet  
 Use Placements  
 Use Events  
 Use Calendar  
 Use Appointments

Password  
Assign Password: Enter a new password here.

Verify Password  
Verify Assigned Password: Re-enter the password to verify, then click SAVE or SUBMIT when done.

Reset Password

Simplify Interface

**STEP 30:  
Left mouse click the 'Submit'  
button.**

# Register/Build a Veteran Account

The screenshot shows the VA CSM website interface. The browser title is "VA CSM - Windows Internet Explorer" and the address bar shows "https://va-csm.simplicity.com/manager/index.php?mode=list&". The page header includes the "VETSUCCESS.GOV" logo and the text "CAREER SERVICES MANAGER powered by simplicity". The user is logged in as "Lyrion Blum" on "Tuesday, May 22, 2012 | 7:32 pm". A "Logout" button is circled in red in the top right corner. A red box highlights the text "STEP 31: Left mouse click the 'Logout' button." The main content area is titled "Veterans" and contains a search bar with the keyword "window". Below the search bar is a table with 6 columns: Last, First, Employment Track, Station/RO#, Email, Case Status, resume, Status, Logins, and Email Verified. The table lists 6 veterans, with the last one named "window" having a status of "(disabled)".

**STEP 31:**  
Left mouse click the  
'Logout' button.

	Last	First	Employment Track	Station/RO#	Email	Case Status	resume	Status	Logins	Email Verified
<input type="checkbox"/>	Agerhold	Ronald		319- Columbia, SC	r.window@yahoo.com				1	✓
<input type="checkbox"/>	Ashwood	Johnny			wood_3@windowslive.com				0	✗
<input type="checkbox"/>	Higgins	Michael		339- Denver, CO	a_simpvcleanwindow@gmail.com				1	✓
<input type="checkbox"/>	Mays	Ronald			ronald.mays@windowslive.com			(disabled)	0	✗
<input type="checkbox"/>	Watson	Paul			pate-toop@windowslive.com			(disabled)	0	✗
<input type="checkbox"/>	window	new			newwindow7@gmail.com			(disabled)	0	✗

# **HOW TO SETUP AVAILABLE APPOINTMENT TIMES FOR THE FIRST WEEK**

This section contains a series of screen captures showing you the 12 steps necessary to establish the available appointment START TIMES in the Online Scheduling Calendar tool for the first week of your participation in the pilot. This is a ONE TIME TASK for this pilot.

# Setting up your Counselor Account

**STEP 1:**  
**Left mouse click 'Counseling'.**

**ANNOUNCEMENTS**  
**NRD WIDGET**  
**National Resource Directory (NRD)**

The National Resource Directory (NRD) is the leading online resource that connects wounded, ill and injured service members, veterans, their families and care providers to the information, services and support they need. It offers quick and easy access to a full range of medical and non-medical programs and services, including medical care, mental health care, substance abuse treatment, and more. The NRD also provides information on the benefits, services and support available to veterans and their families through state and local agencies and veterans service organizations.

The NRD has worked hand-in-hand with Google and leading national job boards to provide a Veteran Job Search capability that will enable Veteran job seekers to search based on keyword, location, or Military Occupational Code (MOC). Using the MOC field, job seekers will be able to further customize their search criteria based on the Civilian Equivalents attributed to their MOC. The National Resource Directory has also developed a job widget that enables any website to easily embed a veteran targeted job search into their own site.

The National Resource Directory (NRD) is proud to support this important job search service for our Veterans. By integrating information technology and data from several Federal Agencies and the private sector in a reusable widget the NRD shows the power of collaboration, innovation, and the use of "light technology" and shared solutions to bring relevant services to our Veterans.

**PENDING ACTIONS SUMMARY**

<a href="#">New Employer Registrations</a>	7
<a href="#">New Information Session Request</a>	0
<a href="#">Assigned to Me / All Pending Appointments</a>	0/0

**CSM STATISTICS AS OF 10:36 AM**

Registered Employers	2681
Registered Employer Contacts	3492
Registered Veterans	126557
Veterans resumes viewable to employers	14188
Veterans resumes not viewable to employers	954
Job Postings	2029
Scheduled Information Sessions	0

Calendar: March 2012

26	27	28	29	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

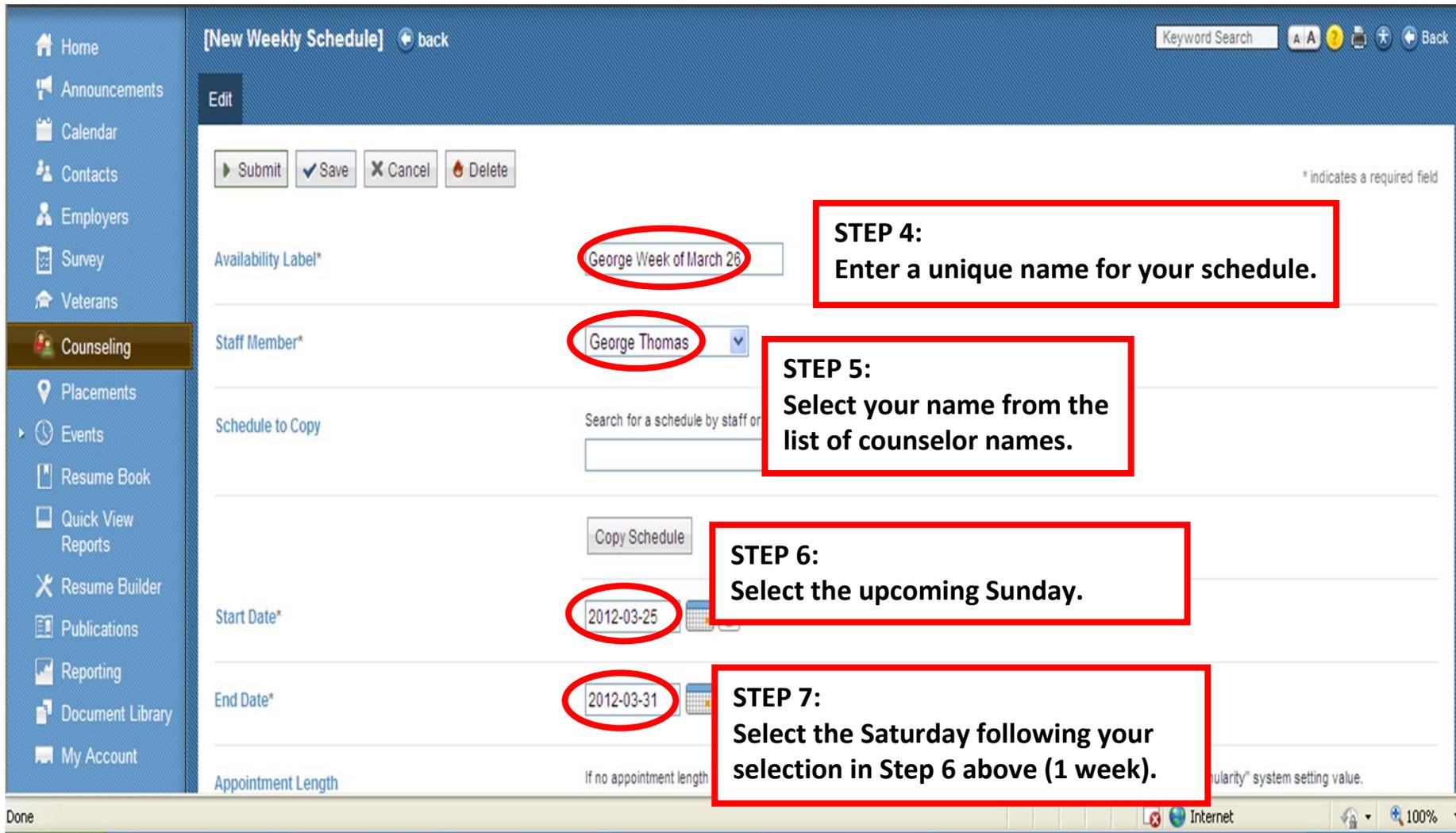
# Building your Appointment Availability Schedule

The screenshot displays the VETSUCCESS.GOV Career Services Manager interface. The top navigation bar includes the logo, the text "VETSUCCESS.GOV CAREER SERVICES MANAGER powered by simplicity", the date "Wednesday, March 28, 2012 | 11:09 am | George Thomas", and a "Logout" button. The left sidebar contains a menu with items like Home, Announcements, Calendar, Contacts, Employers, Survey, Veterans, Counseling (highlighted), Placements, Events, Resume Book, Quick View Reports, Resume Builder, Publications, Reporting, Document Library, and My Account. The main content area is titled "Career Counseling" and features tabs for "Appointments", "Pending Appointments", "Archived Appointments", "Counseling Availability" (circled in red), and "All Students". Below these tabs are sub-tabs for "Weekly Availability" and "Events/Conflicts", and "Active Schedules" and "Historic Schedules". A search form includes a "Label" input field, a "Staff" dropdown menu, and buttons for "Apply Search", "Clear", and "Save Defaults". A yellow warning banner states "No records found." At the bottom of the sidebar, the "+ Add New" button is circled in red. A red-bordered text box in the upper right of the main area provides instructions for Step 2, and another red-bordered text box in the lower right provides instructions for Step 3.

**STEP 2:**  
Left mouse click 'Counseling Availability' tab to build your schedule of availability on a day by day basis.

**STEP 3:**  
Left mouse click '+ Add New' to build a schedule identifying day to day windows of availability that a Veteran can request as **START TIME's** for a counseling session.

# Assigning Label and dates for first week's schedule



[New Weekly Schedule] back

Keyword Search

Home  
Announcements  
Calendar  
Contacts  
Employers  
Survey  
Veterans  
Counseling  
Placements  
Events  
Resume Book  
Quick View Reports  
Resume Builder  
Publications  
Reporting  
Document Library  
My Account

Edit

Submit Save Cancel Delete

\* indicates a required field

Availability Label\* George Week of March 26

Staff Member\* George Thomas

Schedule to Copy Search for a schedule by staff or

Copy Schedule

Start Date\* 2012-03-25

End Date\* 2012-03-31

Appointment Length If no appointment length

Internet 100%

STEP 4:  
Enter a unique name for your schedule.

STEP 5:  
Select your name from the list of counselor names.

STEP 6:  
Select the upcoming Sunday.

STEP 7:  
Select the Saturday following your selection in Step 6 above (1 week).

# Setup allowable appointment lengths and 'on the hour' start times

Resume Book

Quick View Reports

Resume Builder

Publications

Reporting

Document Library

My Account

Users Online

- (6) Students
- (1) Employers
- (1) Manager

Training

- User Guide
- Videos

Support

- Symplificy CARES
- Submit Issue
- Send Email

Call Help Desk: 1-703-373-7040

Hours: Mon-Fri 9am-8pm ET (except holidays)

Copy Schedule

Start Date\* 2012-03-25

End Date\* 2012-03-31

Appointment Length

If no appointment length is selected, the system defaults the appointment length to the "Specify Counseling Session Granularity" system setting value.

[Select] clear

- 60
- 30

**STEP 8:**  
Select appointment lengths of 30 and 60 minutes ONLY. (Requires two actions to select both).

Meeting Start Options (per hour)

Select possible appointment start times. If none are selected, the start time will be the start time selected in the timespan windows.

[Select] clear

- :30
- :00

**STEP 9:**  
Select appointment start times of 00 and 30 ONLY. (Requires two actions to select both).

Done

Internet

100%

# Skip over selection of types (you receive all by default)

(1) Manager

Training

- User Guide
- Videos

Support

- Simplicity CARES
- Submit Issue
- Send Email

Call Help Desk: 1-703-373-7040

Hours: Mon-Fri 9am-8pm ET (except holidays)

Meeting Start Options (per hour)

Select possible appointment start times. If none are selected, the start time will be the start time selected in the timespan windows.

[Select] [clear]

- :30
- :00

Type(s)

These types determine which counseling type the counselor is available for. If none selected, counselor will be available for all types.

- 5 Track Employment
- Application
- Employment Orientation
- Triage for Track Selection
- Entitlement Determination
- Independent Living
- Job Ready Service
- Rapid Access
- Re-Employment
- Self Employment

**NOTE:**  
**Do NOT select any counseling type(s), all types will be available by default.**

Monday Tuesday Wednesday Thursday Friday Saturday Sunday

8:00 am 8:00 am 8:00 am 8:00 am 8:00 am 8:00 am 8:00 am

Done Internet 100%

# Establish Available Appointment START times for each day of week

## IMPORTANT !!!

Remember, if you wish to end your day at say 4:30, your last appointment available time needs to be 3:30.

- Application
- Employment Orientation
- Triage for Track Selection
- Entitlement Determination
- Independent Living
- Job Ready Service
- Rapid Access
- Re-Employment
- Self Employment

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
8:00 am	8:00 am	8:00 am	8:00 am	8:00 am	8:00 am
8:30 am	8:30 am	8:30 am	8:30 am	8:30 am	8:30 am
9:00 am	9:00 am	9:00 am	9:00 am	9:00 am	9:00 am
9:30 am	9:30 am	9:30 am	9:30 am	9:30 am	9:30 am
10:00 am	10:00 am	10:00 am	10:00 am	10:00 am	10:00 am
10:30 am	10:30 am	10:30 am	10:30 am	10:30 am	10:30 am
11:00 am	11:00 am	11:00 am	11:00 am	11:00 am	11:00 am
11:30 am	11:30 am	11:30 am	11:30 am	11:30 am	11:30 am
12:00 pm	12:00 pm	12:00 pm	12:00 pm	12:00 pm	12:00 pm
12:30 pm	12:30 pm	12:30 pm	12:30 pm	12:30 pm	12:30 pm
1:00 pm	1:00 pm	1:00 pm	1:00 pm	1:00 pm	1:00 pm
1:30 pm	1:30 pm	1:30 pm	1:30 pm	1:30 pm	1:30 pm
2:00 pm	2:00 pm	2:00 pm	2:00 pm	2:00 pm	2:00 pm
2:30 pm	2:30 pm	2:30 pm	2:30 pm	2:30 pm	2:30 pm
3:00 pm	3:00 pm	3:00 pm	3:00 pm	3:00 pm	3:00 pm
3:30 pm	3:30 pm	3:30 pm	3:30 pm	3:30 pm	3:30 pm
4:00 pm	4:00 pm	4:00 pm	4:00 pm	4:00 pm	4:00 pm
4:30 pm	4:30 pm	4:30 pm	4:30 pm	4:30 pm	4:30 pm

## STEP 10:

While holding the 'Ctrl' key down, left mouse click on each of the times that you wish to be made allowable as a **START TIME** for a counseling session. Your selections will be seen highlighted in blue. If necessary, again, while holding the 'Ctrl' key down, you can left mouse click on any highlighted blue time to deselect that time. Perform for each work day for the week.

## STEP 11:

Left mouse click 'Submit' for your selections to be accepted.

# Verify First Week's Schedule has been built

The screenshot shows the Career Services Manager interface. The left sidebar contains navigation options: Home, Announcements, Calendar, Contacts, Employers, Survey, Veterans, Counseling (highlighted), Placements, Events, Resume Book, Quick View Reports, Resume Builder, Publications, Reporting, Document Library, and My Account. The main content area is titled 'Career Counseling' and has tabs for Appointments, Pending Appointments, Archived Appointments, Counseling Availability (selected), and All Students. Under 'Counseling Availability', there are sub-tabs for Weekly Availability (selected) and Events/Conflicts. Below these are tabs for Active Schedules (selected) and Historic Schedules. A search form includes a 'Label' input field, a 'Staff' dropdown menu, and buttons for 'Apply Search', 'Clear', and 'Save Defaults'. Below the search form is a '+ Add New' button and 'Items 1-1 of 1'. A table displays the schedule with columns: Label, Staff Members, Start Date, and End Date. The first row shows 'George Week of March 26', 'George Thomas', 'Mar 25, 2012', and 'Mar 31, 2012'. The label 'George Week of March 26' is circled in red. Below the table is another '+ Add New' button and 'Items 1-1 of 1'. A 'Showing 20' dropdown is visible on the right side of the table. A red box highlights the table row and contains the following text:

**STEP 12:**  
Left mouse click on the label of the weekly schedule you just built and saved (In this case, George Week of March 26).

# HOW TO SETUP APPOINTMENT TIMES FOR ADDITIONAL WEEKS

This section contains a series of screen captures showing you the 9 steps necessary to establish the available appointment START TIMES in the Online Scheduling Calendar tool for the remaining weeks of your participation in the pilot.

# Building Schedules for Additional Weeks

Weekly Schedule: "George Week of March 26" back

Keyword Search A A ? [Icons] Back

Edit

Submit Save Cancel Delete

\* indicates a required field

Availability Label\* George Week of March 26

Staff Member\* George Thomas

Schedule to Copy

Search for a schedule by staff or label

george

George Week of March 26 (George Thomas)

Copy Schedule

Start Date\* 2012-03-25 [Calendar Icon] [Clear Icon]

End Date\* 2012-03-31 [Calendar Icon] [Clear Icon]

Appointment Length

If no appointment length is selected, the system defaults the appointment length to the "Specify Counseling Session Granularity" system setting value.

Done Internet 100%

**STEP 1:**

Begin typing in the name of the label of your previously saved schedule. Left mouse click on the desired selection.

**STEP 2:**

Left mouse click on the 'Copy Schedule' button.

# Building Schedules for Additional Weeks

The screenshot shows a web-based scheduling interface. On the left is a navigation sidebar with categories like 'Resume Builder', 'Publications', 'Reporting', 'Document Library', 'My Account', 'Users Online', 'Training', and 'Support'. The main content area has several sections: 'Start Date\*' and 'End Date\*' with calendar icons and date pickers; 'Appointment Length' with a dropdown menu and a list of options (60, 30); 'Meeting Start Options (per hour)' with a list of time slots (:00, :30); and 'Type(s)' with a list of counseling types. Two red circles highlight the date pickers for 'Start Date\*' (2012-04-01) and 'End Date\*' (2012-04-07). A red-bordered box contains the text: 'STEP 3: Edit the Start date and End Date to identify a new week.' Another red-bordered box contains the text: 'NOTE: The 'Appointment Length', 'Meeting Start Options', and 'Type(s)' remain as is. Do NOT adjust these items.'

**STEP 3:**  
Edit the Start date and End Date to identify a new week.

**NOTE:**  
The 'Appointment Length', 'Meeting Start Options', and 'Type(s)' remain as is. Do NOT adjust these items.

# Building Schedules for Additional Weeks

CAREER SERVICES MANAGER powered by symphony

Weekly Schedule: "George Week of April 1" back

Keyword Search A A ? Back

Edit

Submit Save Cancel Delete

\* indicates a required field

Availability Label\*

Staff Member\*

Schedule to Copy

Search for a schedule by staff or label

Copy Schedule

Start Date\*

End Date\*

Appointment Length

If no appointment length is selected, the system defaults the appointment length to the "Specify Counseling Session Granularity" system setting value.

Done Internet 100%

# Building Schedules for Additional Weeks

## IMPORTANT !!!

Remember, if you wish to end your day at say 4:30, your last appointment available time needs to be 3:30.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
8:00 am	8:00 am	8:00 am	8:00 am	8:00 am	8:00 am	8:00 am	8:00 am
8:30 am	8:30 am	8:30 am	8:30 am	8:30 am	8:30 am	8:30 am	8:30 am
9:00 am	9:00 am	9:00 am	9:00 am	9:00 am	9:00 am	9:00 am	9:00 am
9:30 am	9:30 am	9:30 am	9:30 am	9:30 am	9:30 am	9:30 am	9:30 am
10:00 am	10:00 am	10:00 am	10:00 am	10:00 am	10:00 am	10:00 am	10:00 am
10:30 am	10:30 am	10:30 am	10:30 am	10:30 am	10:30 am	10:30 am	10:30 am
11:00 am	11:00 am	11:00 am	11:00 am	11:00 am	11:00 am	11:00 am	11:00 am
11:30 am	11:30 am	11:30 am	11:30 am	11:30 am	11:30 am	11:30 am	11:30 am
12:00 pm	12:00 pm	12:00 pm	12:00 pm	12:00 pm	12:00 pm	12:00 pm	12:00 pm
12:30 pm	12:30 pm	12:30 pm	12:30 pm	12:30 pm	12:30 pm	12:30 pm	12:30 pm
1:00 pm	1:00 pm	1:00 pm	1:00 pm	1:00 pm	1:00 pm	1:00 pm	1:00 pm
1:30 pm	1:30 pm	1:30 pm	1:30 pm	1:30 pm	1:30 pm	1:30 pm	1:30 pm
2:00 pm	2:00 pm	2:00 pm	2:00 pm	2:00 pm	2:00 pm	2:00 pm	2:00 pm
2:30 pm	2:30 pm	2:30 pm	2:30 pm	2:30 pm	2:30 pm	2:30 pm	2:30 pm
3:00 pm	3:00 pm	3:00 pm	3:00 pm	3:00 pm	3:00 pm	3:00 pm	3:00 pm
3:30 pm	3:30 pm	3:30 pm	3:30 pm	3:30 pm	3:30 pm	3:30 pm	3:30 pm
4:00 pm	4:00 pm	4:00 pm	4:00 pm	4:00 pm	4:00 pm	4:00 pm	4:00 pm
4:30 pm	4:30 pm	4:30 pm	4:30 pm	4:30 pm	4:30 pm	4:30 pm	4:30 pm

Application  
 Employment Orientation  
 Triage for Track Selection  
 Entitlement Determination  
 Independent Living  
 Job Ready Service  
 Rapid Access  
 Re-Employment  
 Self Employment

Submit Save Cancel Delete

Internet 100%

## STEP 5:

The Selected times will be as you had set them in the week you copied from. While holding the 'Ctrl' key down, Left mouse click to adjust your available START TIME's for counseling sessions as necessary. Your selections will be seen highlighted in blue. If necessary, again, while holding the 'Ctrl' key down, you can Left mouse click on any highlighted blue time to deselect that time.

## STEP 6:

Left mouse click the 'Save' button.

# Building Schedules for Additional Weeks

**Step 7:**  
Repeat Steps 1-6 to build a new weekly schedule for each week of the pilot.

**Step 8:**  
After the last week's schedule has been built, Left mouse click on the 'Cancel' button to return back to the 'Counseling Availability' tab.

# Setup's Complete, You are Ready to Receive Appointments

The screenshot shows the VA CSM Career Counseling interface. The left sidebar contains navigation options such as Home, Announcements, Calendar, Contacts, Employers, Survey, Veterans, Counseling (highlighted), Placements, Events, Resume Book, Quick View Reports, Resume Builder, Publications, Reporting, Document Library, My Account, and Users Online. The main content area is titled 'Career Counseling' and includes tabs for Appointments, Pending Appointments, Archived Appointments, Counseling Availability (selected), and All Students. Under 'Counseling Availability', there are sub-tabs for Weekly Availability and Events/Conflicts. Below these are sections for Active Schedules and Historic Schedules. A search area includes a 'Label' input field, a 'Staff' input field, and an 'Apply Search' button. A table displays the following data:

Label	Staff	Start Date	End Date
<a href="#">George Week of April 1</a>	George Thomas	Apr 01, 2012	Apr 07, 2012
<a href="#">George Week of April 15</a>	George Thomas	Apr 15, 2012	Apr 21, 2012
<a href="#">George Week of April 8</a>	George Thomas	Apr 08, 2012	Apr 14, 2012
<a href="#">George Week of March 25</a>	George Thomas	Mar 25, 2012	Mar 31, 2012

A red box highlights the text: **Step 9: Verify all of your weekly schedules appear. You are now ready to receive counseling appointments.** A red circle highlights the 'Label' column header and the first four rows of the table.

# HOW TO ACCEPT PENDING APPOINTMENTS YOU HAVE WITH VETERANS

This section contains a series of screen captures showing you the 4 steps necessary to accept pending appointments in the Online Scheduling tool with participating Veterans.

**IT IS RECOMMENDED THAT YOU PERFORM THIS SECTION  
AT LEAST ONCE EVERY DAY. DON'T RELY ON AUTOMATED EMAILS TO  
NOTIFY YOU OF PENDING APPOINTMENTS.**

# Accepting Pending Appointments made by Veterans

The screenshot shows the 'Career Counseling' interface. The 'Pending Appointments' tab is selected and circled in red. Below it, a table lists appointments. The 'Edit' button for the first appointment is circled in red, while the 'View' button is crossed out with a red 'X'. Two text boxes provide instructions: 'Step 1: Left mouse click the 'Pending Appointments' tab.' and 'Step 2: Left mouse click the 'Edit' button. Do NOT select the 'View' button.'

Options	Last Name	First Name	Counseling Type	Student Comments
<input type="checkbox"/> <del>View</del> <input checked="" type="checkbox"/> Edit	Neal	Lou	Application	

**Note:**

For each appointment request made by a Veteran you should receive an email titled 'Appointment Request Received' with content similar to the following:

Tuesday, June 05, 2012, 09:15 pm

You have received a request for a counseling appointment from the VetSuccess.gov online scheduling tool.

Time: 10:00 am on June 7, 2012

Veteran: Joe Sample

Appointment Type: Entitlement Determination

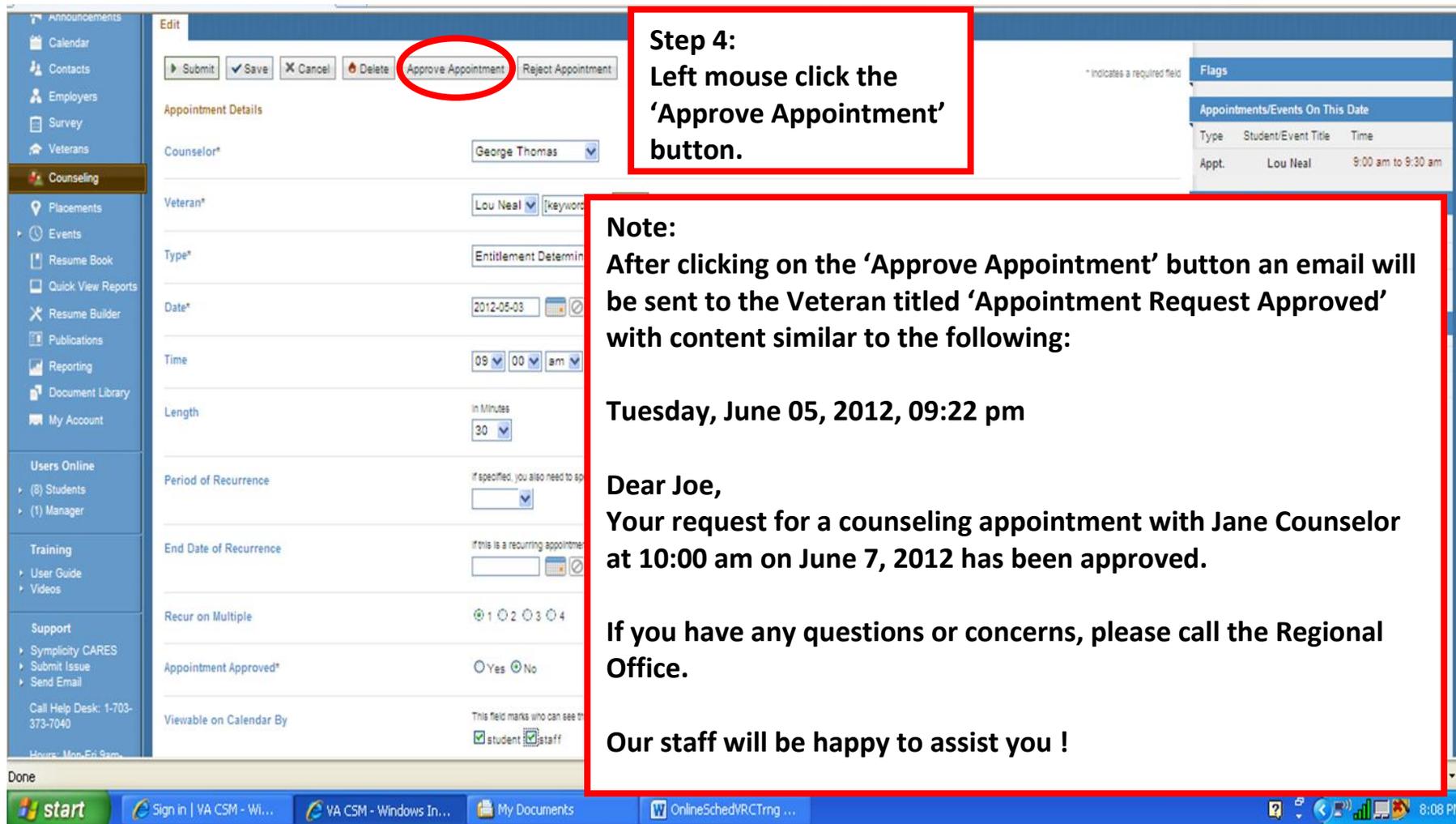
Please go to: <https://va-csm.symlicity.com/manager/>

to accept or decline the appointment.

# Accepting Pending Appointments made by Veterans

**Step 3:**  
It is **IMPORTANT** that you select the 'student' and 'staff' check boxes for the 'Viewable on Calendar By' BEFORE you select 'Approve Appointment'. If you do not select these options, the appointment will not show up on the Veteran's Online Scheduling calendar.

# Accepting Appointments made by Veterans



The screenshot displays the 'Edit' form for an appointment. The 'Approve Appointment' button is circled in red. The form fields include: Counselor\* (George Thomas), Veteran\* (Lou Neal), Type\* (Entitlement Determination), Date\* (2012-06-03), Time (09:00 am), Length (30 minutes), Period of Recurrence, End Date of Recurrence, Recur on Multiple (1-4), Appointment Approved\* (Yes/No), and Viewable on Calendar By (student, staff).

**Step 4:**  
Left mouse click the 'Approve Appointment' button.

**Note:**  
After clicking on the 'Approve Appointment' button an email will be sent to the Veteran titled 'Appointment Request Approved' with content similar to the following:

**Tuesday, June 05, 2012, 09:22 pm**

**Dear Joe,**  
**Your request for a counseling appointment with Jane Counselor at 10:00 am on June 7, 2012 has been approved.**

**If you have any questions or concerns, please call the Regional Office.**

**Our staff will be happy to assist you !**

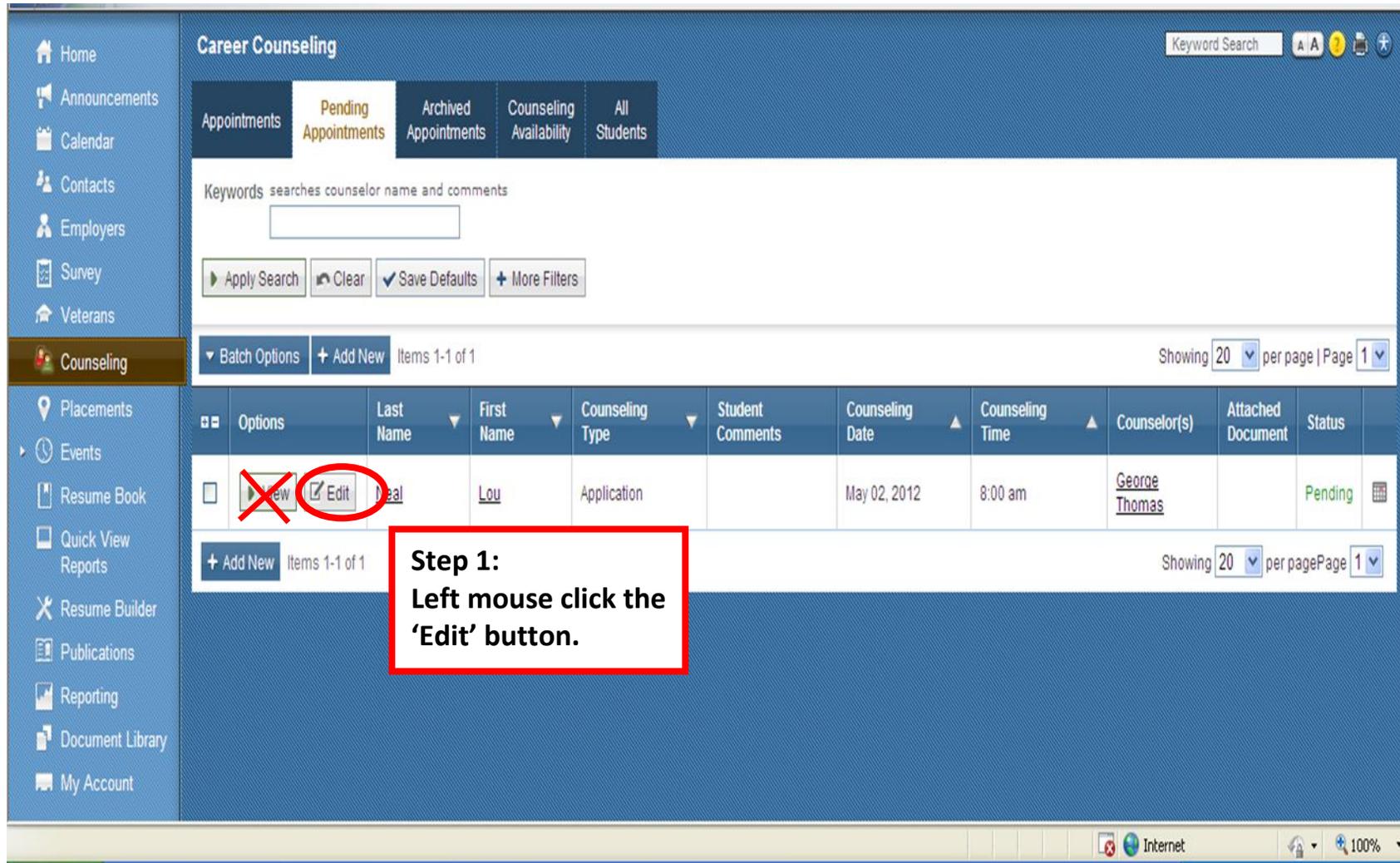
# HOW TO CANCEL PENDING APPOINTMENTS YOU HAVE WITH VETERANS

This section contains a series of screen captures showing you the 4 steps necessary to cancel pending appointments in the Online Scheduling tool with participating Veterans.

NOTE: It is best to select this option rather than changing the day or time of a pending appointment from a Veteran. This is due to the email that is sent to the Veteran is very similar to what they receive if the appointment is accepted as is. The email could easily cause a misunderstanding of the day/time.

**Rather than make changes to a Veteran's request, cancel the current request and have the Veteran submit a new appointment request.**

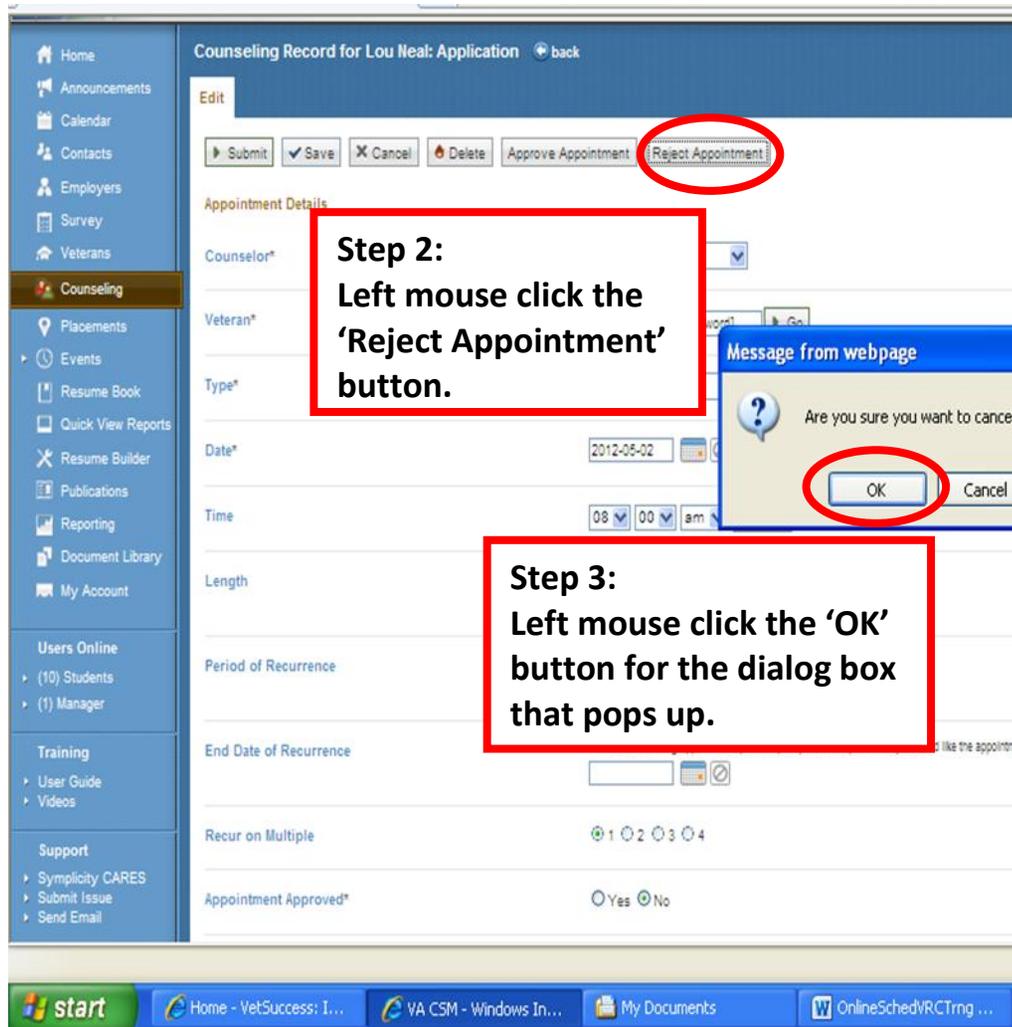
# Cancelling Pending Appointments made by Veterans



The screenshot displays the 'Career Counseling' interface. The 'Pending Appointments' tab is selected. A search bar is present with the text 'Keywords searches counselor name and comments'. Below the search bar are buttons for 'Apply Search', 'Clear', 'Save Defaults', and 'More Filters'. The main content area shows a table with the following columns: Options, Last Name, First Name, Counseling Type, Student Comments, Counseling Date, Counseling Time, Counselor(s), Attached Document, and Status. A single row is visible with the following data: [checkbox], [X] New, [Edit], Deal, Lou, Application, May 02, 2012, 8:00 am, George Thomas, [document icon], Pending. A red box highlights the 'Edit' button, and a text box below it reads: 'Step 1: Left mouse click the 'Edit' button.'

Options	Last Name	First Name	Counseling Type	Student Comments	Counseling Date	Counseling Time	Counselor(s)	Attached Document	Status
<input type="checkbox"/>	Deal	Lou	Application		May 02, 2012	8:00 am	George Thomas		Pending

# Cancelling Pending Appointments made by Veterans



The screenshot displays the 'Counseling Record for Lou Neal: Application' page. The 'Reject Appointment' button is circled in red. A dialog box titled 'Message from webpage' is open, asking 'Are you sure you want to cancel', with the 'OK' button also circled in red. The appointment details show a date of 2012-05-02 and a time of 08:00 am.

**Step 2:**  
Left mouse click the 'Reject Appointment' button.

**Step 3:**  
Left mouse click the 'OK' button for the dialog box that pops up.

**Note:**  
After clicking on the 'OK' button an email will be sent to the Veteran titled 'Appointment Request Declined' with content similar to the following:

Tuesday, June 05, 2012, 09:25 pm

Dear Lou,  
We regret to inform you that your appointment request to meet with Jane Counselor at 10:00 am on June 7, 2012 cannot be accommodated at this time.

Please select a new time or call the Regional Office.

Our staff will be happy to assist you.

We look forward to working with you !

# Cancelling Pending Appointments made by Veterans

**Step 4:**  
Left mouse click the  
'Cancel' button to return to  
the Counseling main menu.

**Appointment Details**

Counselor\*

Veteran\*

Type\* Self Employment

Date\* 2012-05-14

Time 09:30 am

Length 30 In Minutes

Period of Recurrence

End Date of Recurrence

Recur on Multiple 1 2 3 4

**Administrative Info**

Created Date Sun, May 6, 2012, 3:09 pm

Last Modified Sun, May 6, 2012, 6:31 pm

Modified By George Thomas

Walk-in Appointment? -

**Veteran Information**

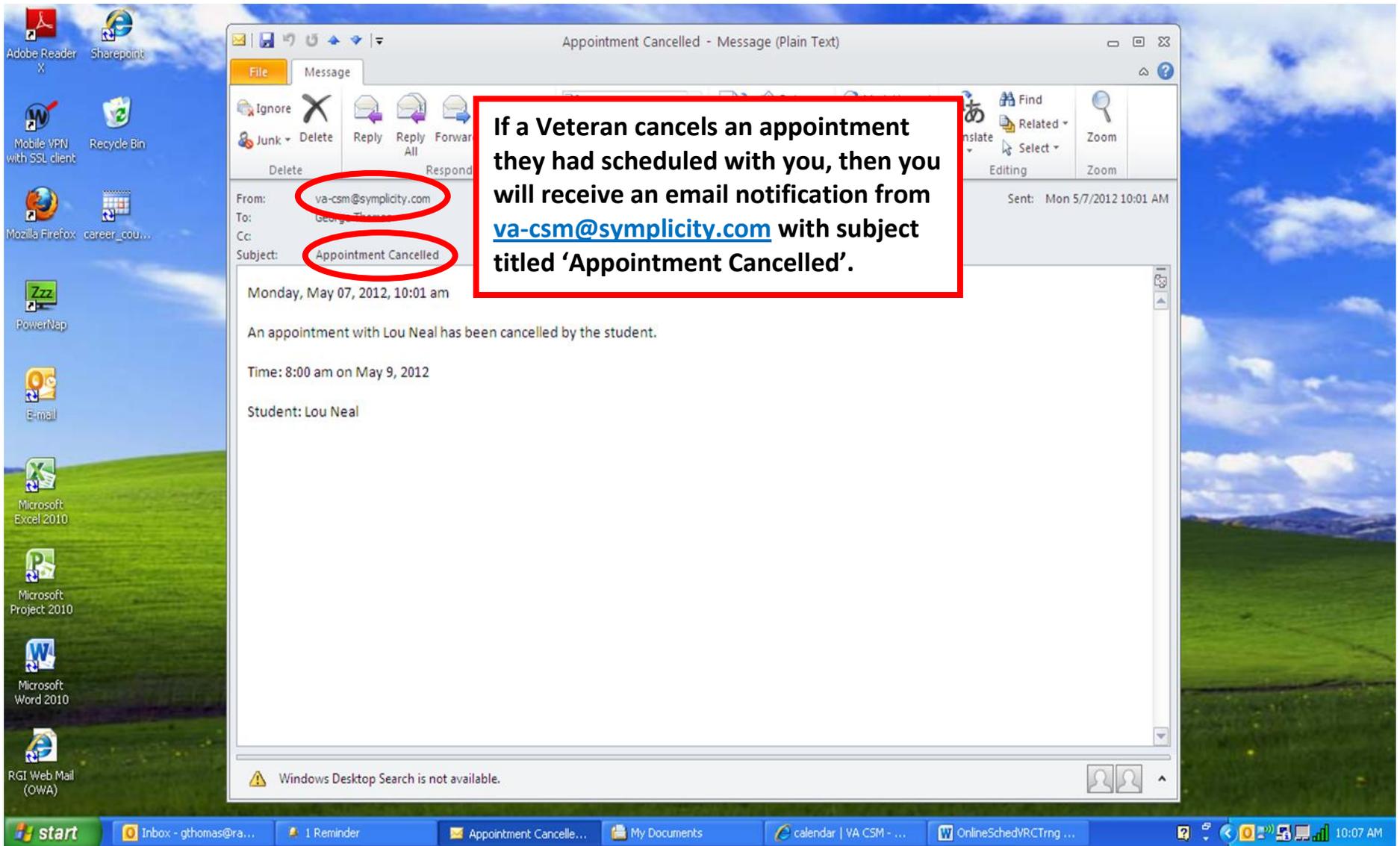
Fullname Lou Neal

Email george.gls.thomas@gmail.com

# **RECEIVING A CANCELLED APPOINTMENT FROM A VETERAN**

This section contains a screen capture showing you the email notification you will receive if a Veteran cancels an appointment with you in the Online Scheduling tool.

# Receiving a Cancelled Appointment from a Veteran



# HOW TO VIEW PARTICIPATING VETERANS

This section contains a screen capture showing you the 2 steps necessary to view your assigned Veterans that will be participating in the Online Scheduling tool with you.

# View Your Participating Veterans

The screenshot shows the 'Career Counseling' interface. The 'All Students' tab is highlighted in a red circle. Below the search bar, a table lists participating veterans. The 'Last' and 'First' columns are also highlighted in red circles. The table contains the following data:

	Last	First	Email
<input type="checkbox"/>	<a href="#">Debug</a>	Student	<a href="mailto:ldavies@svmplicity.com">ldavies@svmplicity.com</a>
<input type="checkbox"/>	<a href="#">Harvey</a>	George	<a href="mailto:gharvey@ravagroupintl.com">gharvey@ravagroupintl.com</a>
<input type="checkbox"/>	<a href="#">Harvey</a>	Thomas	<a href="mailto:tharvey@ravagroupintl.com">tharvey@ravagroupintl.com</a>
<input type="checkbox"/>	<a href="#">Neal</a>	Louis	<a href="mailto:ln Neal@ravagroupintl.com">ln Neal@ravagroupintl.com</a>
<input type="checkbox"/>	<a href="#">Thomas</a>	George	<a href="mailto:tgeorge@ravagroupintl.com">tgeorge@ravagroupintl.com</a>

Step 1: Left mouse click on the 'All Students' tab and you should see a list of all of your Veterans that have been signed up to participate in this pilot.

Step 2: You can Left mouse click on 'Last' or 'First' to sort by whichever of the two fields you prefer. Additional Left mouse clicks in the same field will alternate the sorting order between Ascending and Descending.

# **HOW TO VIEW APPROVED/PENDING/ARCHIVED APPOINTMENTS YOU HAVE WITH VETERANS**

This section contains a series of screen captures showing you the 5 steps necessary to view approved, pending, or archived appointments in the Online Scheduling tool with participating Veterans.

# Viewing Approved Appointments with Veterans from Counseling Page

The screenshot displays the 'Career Counseling' web application. The left sidebar contains navigation links: Home, Announcements, Calendar, Contacts, Employers, Survey, Veterans, Counseling (highlighted), Placements, Events, Resume Book, Quick View Reports, Resume Builder, Publications, Reporting, Document Library, and My Account. The main content area is titled 'Career Counseling' and features a 'Keyword Search' box. Below the search box are tabs for 'Appointments', 'Pending Appointments', 'Archived Appointments', 'Counseling Availability', and 'All Students'. The 'Appointments' tab is circled in red. A red-bordered box contains the text: 'Step 1: Left mouse click on 'Appointments' to view your list of approved appointments with participating Veterans seen here as a running list.' Below this, there is a search input field with 'Keywords searches counselo' and buttons for 'Apply Search' and 'Clear'. A status bar indicates 'Items 1-2 of 2 (4 items selected) Please remember to uncheck the selections after using batch options' and 'Showing 20 per page | Page 1'. The main table lists appointments with columns: Options, Last Name, First Name, Counseling Type, Notes, Counseling Date, Counseling Time, Counselor(s), Attached Document, and Status. Two rows are visible, both with a status of 'Approved'. The first row is for a student named Harvey George with an 'Application' counseling type on Apr 16, 2012 at 8:00 am, counseled by George Thomas. The second row is for a student named Harvey George with an 'Employment Orientation' counseling type on Apr 17, 2012 at 9:00 am, also counseled by George Thomas. At the bottom of the table, there is an 'Add New' button and 'Items 1-2 of 2' and 'Showing 20 per page Page 1'.

Options	Last Name	First Name	Counseling Type	Notes	Counseling Date	Counseling Time	Counselor(s)	Attached Document	Status
<input type="checkbox"/> View Edit	Harvey	George	Application		Apr 16, 2012	8:00 am	George Thomas		Approved
<input type="checkbox"/> View Edit	Harvey	George	Employment Orientation		Apr 17, 2012	9:00 am	George Thomas		Approved

# Viewing Approved Appointments with Veterans from Calendar Page

The screenshot displays a web application interface for viewing appointments. On the left is a navigation menu with items like Home, Announcements, Calendar, Contacts, etc. The main area shows a 'week view' for the week of April 16-22, 2012. Two red boxes highlight the 'Calendar' menu item and the 'Day View'/'Week View' tabs. A third red box highlights the navigation arrows above the calendar grid. The calendar shows an appointment for George Harvey on Monday, April 16, from 8:00 AM to 9:00 AM, and another on Tuesday, April 17, from 9:00 AM to 9:30 AM. A 'jump to' dropdown is visible above the calendar grid.

**Step 1:**  
Your list of approved appointments can also be viewed by a Left mouse click on 'Calendar' in the left column, then Left mouse click on 'Day View' or 'Week View' tab.

**Step 2:**  
Left mouse click on the arrows below to find the date(s) you are interested in.

Mon	Tue	Wed	Thu	Fri	Sat	Sun
			01	02	03	04
05	06	07	08	09	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Mon	Tue	Wed	Thu	Fri	Sat	Sun
						01
02	03	04	05	06	07	08
09	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

# Viewing Pending Appointments with Veterans

**Step 1:**  
Left mouse click the 'Pending Appointments' tab to see the list of appointments submitted from participating Veterans waiting your approval/disapproval below. It is **IMPORTANT** that you check this daily as this is your only notification of a request for an appointment. This tool sends no email to you for a counseling session request initiated by a Veteran.

Options	Last Name	First Name	Counseling Type	Student Comments	Counseling Date	Counseling Time	Counselor(s)	Attached Document	Status
<input type="checkbox"/> View Edit	Neal	Louis	Application		Apr 19, 2012	11:00 am	George Thomas		Pending

**Note:**  
If a pending appointment is not accepted or rejected before the date and time of the appointment, then the appointment rolls over to the 'Archived Appointments' list. See the next slide.

# Viewing Archived Appointments with Veterans

**Step 1:**  
Left mouse click the 'Archived Appointments' tab to see the list of appointments that have been cancelled or for which the date/time has passed.

Options	Last Name	First Name	Counseling Type	Notes	Counseling Date	Counseling Time	Counselor(s)	Attached Document	Status
<input type="checkbox"/> View Edit	Neal	Louis	Application		Apr 19, 2012	11:00 am	George Thomas		Appointment Past
<input type="checkbox"/> View Edit	Harvey	George	Employment Orientation		Apr 17, 2012	9:00 am	George Thomas		Appointment Past
<input type="checkbox"/> View Edit	Thomas	Harvey	Entitlement Determination		Apr 17, 2012	9:00 am	George Thomas		Cancelled
<input type="checkbox"/> View Edit	Harvey	George	Application		Apr 16, 2012	8:00 am	George Thomas		Appointment Past
<input type="checkbox"/> View Edit	Thomas	Harvey	Application		Apr 03, 2012	1:00 pm	George Thomas		Appointment Past