



Clinical Reminders

Manager Manual

Setup & Maintenance

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Revision History

Date	Page	Change
August 2000		Description of patch PXR*1.5*1, Hep C Initiative, EPI Initiative, and Hepatitis Extract build. New report options with PXR*1.5*1 for EPI
August 2000		New Reminder Term Descriptions
Oct – March 2001		Numerous fixes and enhancements with patch PXR*1.5*2 are documented throughout; see the list of fixes and enhancements starting on page 3.
May 2001		New options on CPRS Configuration menu – Patch PXR*1.5*4
June 2001		New Menu, Reminder Sponsor Management
May-July 2001	Chapter 6	Patch 5 changes – Exchange Utility options
Sept.-Dec	Chapter 5	Patch 6 changes – Report Enhancements
January 2002	p 22; 29-31	Changes for Patch 7 - Introduction of National MST Reminder and Dialog changes; Changes to the Exchange Utility
January	3	Release Notes – summary of major changes in patches 1-7

Section I – Introduction

Overview

Version 1.5 of Clinical Reminders contains many new useful features for clinicians, as well as improved management tools for Clinical Reminders managers.

What are Clinical Reminders and what do they do for the Clinician?

- Inform clinicians when a patient is due to receive clinical activity.
- Target the location/provider that best manages the resolution clinical activity.
- Identify patients a reminder “applies” to, based on *VISTA* patient data.
- Identify what clinical activities “resolve or satisfy” the reminder.
- Summarize pertinent patient information to aid the clinician in deciding follow-up activity.
- Allow clinicians to resolve reminders through CPRS.

This manual describes how to set up clinical reminders to provide better patient care.

Related Documentation

Clinical Reminders Installation Guide

Clinical Reminders Clinician Guide

Clinical Reminders Exchange Utility Quick Reference Card

CPRS Online Help

Reminders help is included within the CPRS Help files, available from the Help menu on the CPRS GUI. Help can also be accessed on specific Reminders screens with the F1 key.

Related Web Sites

Clinical Reminders Page	http://VistA.med.va.gov/reminders
VISN 1 PCE Forum	http://vawww.med.va.gov/visn1
VISN 10 Reminders	http://vaww.dayton.med.va.gov/cprs/Clinical_Reminders/Reminders-List.htm
VISN 12 Reminders	http://vaww.visn12.med.va.gov/VISN_Programs/docs.asp?strFolder=CPRS_Documents&step=1
VISN 15 Reminders	http://152.131.71.182/CPRSPage/VISN15REMINDERS/VISN15REMINDERS.htm
Mental Health Strategic Health Care Group- Clinical Reminders	http://vaww.mentalhealth.med.va.gov/clinical_reminders.htm
VISTA University CPRS Training	http://vaww.vistau.med.va.gov/VistaU/CPRS/

New Features in Clinical Reminders V. 1.5

- Streamlines the reminder definition and the tools used to create definitions
- Includes orderable items, medications, and mental health tests as patient findings
- Includes the use of result values
- Handles complex patient cohort logic and resolution logic
- Enhances patient data displayed in the reminder Health Summary components
- Provides “Point and click” reminder resolution processing through the Notes and Consults tabs in CPRS
- Provides new tools to define dialogs for reminders that are used in “point and click” resolution processing

Clinical Reminders Release Notes

Summary of Enhancements provided in patches to Clinical Reminders 1.5

The following features have been added to the Clinical Reminders package since the release of 1.5 in June 2000. These features are described in more detail under the individual patch descriptions that follow this summary.

New national reminders

The following national reminders have been distributed, to help sites meet national mandates and guidelines:

VA-HEP C RISK ASSESSMENT
VA-NATIONAL EPI LAB EXTRACT
VA-NATIONAL EPI RX EXTRACT
VA-MST SCREENING

Reminder Exchange Utility

- Patch 5 provided a new and improved version of the exchange utility that was distributed with Clinical Reminders through PCE. The original reminder exchange allowed reminder definitions to be packed directly into host files or MailMan messages and passed to other sites. At the receiving site, the components in the packed reminder could be installed by processing the entire list.

In the new version, reminder definitions are first packed into the Exchange File (#811.8) in XML format. A packed reminder or Exchange File entry contains reminder definitions, reminder findings, and reminder dialogs. Everything that is needed by the reminder to function is included.

- Additional improvements to the exchange utility were added with patch 7, which help sites retain any mappings they have made to findings affected by new reminder components. If local findings have been mapped to terms or dialogs, the local finding mappings are retained when a new version of the term or dialog is loaded into the system. This applies to both reminders loaded as a patch and reminders loaded from mail messages. Reminder terms retain the existing mappings and add any new findings imported on the term. Dialog components retain the existing mappings and ignore the incoming mappings. You will no longer get a MailMan message telling you that a term or a dialog was skipped during the patch install.

Reminder Evaluation Changes

- The CONDITION field can now be used with all finding types
- The new field EFFECTIVE DATE was added to the FINDINGS multiple in the REMINDER TERM (#811.5) and REMINDER DEFINITION (#811.9) files. A finding with a date older than the EFFECTIVE DATE will be treated as false.
- A change was made in the calculation of the resolution date for complex resolutions. Previously, the most recent date was used. Now, if two findings are ANDed, the oldest date is used. If two findings are ORed, the most recent date is used. If the logic is complex, then the date is determined by using the above rules.

Reminder Dialog Changes

- Dialog groups and group elements may now be created, edited, copied/renamed, or deleted the same as dialogs (from the Change View action). It is no longer necessary to build component dialog elements before building the dialog group.

The GROUP ENTRY field used for dialog groups allows a new code, None or One Selection

- Changes in conjunction with CPRS to make it easier for clinicians to resolve reminders in Notes or Summaries.

- Three new options were added to the CPRS Reminder Configuration Menu:
 - New Reminder Parameters, which allows a user to modify the cover sheet reminders.
 - Default Outside Location, which allows the default outside location for reminder dialogs to be specified at user, service, division or system level.
 - Position Reminder Text at Cursor allows the position reminder note text at cursor feature to be enabled at user, service, division, or system levels.
- Users who are allowed access to the PXRМ CPRS CONFIGURATION menu are allowed to modify the new reminder cover sheet parameters from within the CPRS GUI. This feature is available from the Edit Cover Sheet Reminder List menu option, under the Action menu of the Reminder Tree dialog.
- Reminder dialogs (not reminders) can be linked to templates, so that a reminder dialog can be selected from the templates drawer (reminder-specific text will not be inserted into the note when the Finish button is pressed). This enables templates to create orders, enter encounter data, vitals, and do everything else that a reminder dialog can do.
- Two new reminders categories are available: Not Applicable & All Evaluated
- You can specify which Categories will be displayed in the reminder tree view
- You can enter Vitals Date/Time and Service Connected information with a Dialog Visit Info button
- Required prompts in dialogs are now marked with an *

Reminder Report Changes

Patch 6 provided the following enhancements, as well as several fixes:

- **New options:**
 - a. User Report Templates
PXRМ REPORT TEMPLATES (USER) allows allocation of templates to individual users.
 - b. Reminders Due Report (User)
PXRМ REMINDERS DUE (USER) allows a user to produce a reminders due report. The user can only run reports from templates allocated to them in the User Report Templates option; the new option doesn't allow users to edit or create templates or run reports without a template.
 - c. Report of Review Dates
PXRМ REVIEW DATES allows review dates up to and including a selected cutoff date to be reported for the reminder package files.

- Combined report option for multiple facilities
If a combined report is selected, a single report is printed for all facilities. The locations/clinics with the same name at different facilities are combined. Combined report and total criteria are now displayed on the report. The combined report is only available for the detailed report option. For the summary report, you can use totals to combine locations. The report also removes any duplicated patients.
- Combined report option for multiple locations.
The report by location has been changed. If more than one location, clinic group, or clinic stop is selected, the following prompt is displayed:
- Full SSN displayed
On the detailed report, you can choose to display either long or short SSN now. If long SSN is selected but a patient is also an employee, then only the short SSN is displayed. There are two fields in the #800 file that affect this:

- 1) FULL SSN - this is the default for the 'full SSN' prompt in the reports
- 2) TRUNCATE EMPLOYEE SSN - this overrides the full SSN prompt for employees

The TRUNCATE EMPLOYEE SSN field is set to Y by the install of patch 6. You can get full employee SSN by setting the value of the field to N (must be done through VA FileMan).

- Options to total summary reports with duplicates suppressed
The summary report allows totals to be printed. At the end of each facility section, a totals page is displayed. Duplicate entries are removed.
- Selection of reminder categories or reminders
The prior version of reports allowed selection of reminders individually. This version allows selection of reminder categories, individual reminders, or both. All reminders in a category are evaluated and due reminders are reported separately in the same format as reminders selected individually. On the summary report, reminders are sorted in name order.
- Option to sort inpatient reports by ward/bed
If a detailed inpatient report is run, you can choose to sort by location/bed option and the report will display the patients in ward/bed order. The default is to display patients in name order, showing the Next Appt. column in place of the Ward/Bed column.
- Delimiter separated output format
This new reports feature allows you to create condensed reports for import into spreadsheet tables.

Patch Descriptions

PXRM*1.5*1 – Hepatitis C Extract

Patch PXRM*1.5*1 was released in September 2000 as part of the Hepatitis C Extract combined build. It added new data to existing files in the Clinical Reminders V. 1.5 package. It also added one new file that temporarily stores data extracted from reminder evaluation processing. This temporary data can be used for review and data validation of data extracted to update the EPI database, based on three reminder definitions:

- VA-HEP C RISK ASSESSMENT
- VA-NATIONAL EPI LAB EXTRACT
- VA-NATIONAL EPI RX EXTRACT

The data extracted for risk assessment is based on the VA-HEP C RISK ASSESSMENT reminder definition. The data extracted from laboratory is based on the VA-NATIONAL EPI LAB EXTRACT reminder, previously distributed as VA-NATIONAL EPI DB UPDATE. Both of these reminders were first released in the Clinical Reminders V.1.5 package. A new reminder definition, VA-NATIONAL EPI RX EXTRACT, is distributed in this patch for extracting pharmacy data. These three reminder definitions provide the criteria for extracting the lab, pharmacy, and risk assessment data.

This patch also added 18 new reminder terms to the REMINDER TERM file (#811.5) and two new report options for reporting extract data.

PXRM*1.5*2 – Clinical Reminder Fixes and Enhancements

Patch 2 provides many fixes in response to NOIS, as well as several enhancements to reminder and dialog definitions. Many related changes have also been made in CPRS patch 85 that affect reminder dialog resolution through CPRS. These are described below.

1. Inquiry Option changes

- All inquiry functions were consolidated into a standard set of print templates and routines. Previously all fields in the FINDINGS multiple of the REMINDER DEFINITION (#811.9) and REMINDER TERM (#811.5) files were printed, even if they were null. Now only non-null fields will be printed. This will provide considerably shorter output.
- A bug in the taxonomy inquiry caused the ICD Operation/Procedure to be displayed incorrectly. This problem is corrected. NOIS: CIN-0900-42457, FAR-0800-40686, HUN-1000-20744, LAH-0101-60194, PHI-0101-20893, V01-0201-N0005.
- If display of the FINDINGS multiple required more than one page, there was no page breaking. Proper page breaking is now done.

2. Data dictionary changes

- A number of fields in the REMINDER TAXONOMY (#811.2) and REMINDER DEFINITION (#811.9) files were made obsolete when Clinical Reminders version 1.5 was released. These fields are deleted by this patch, as well as the associated AC and C cross references in file 811.9.
- Due to the way KIDS works, security codes were not properly set on the previously existing Clinical Reminders' files when Clinical Reminders version 1.5 was installed. The security codes are set to their proper values during the post-install.
- A VERSION field was added to CLINICAL REMINDER PARAMETERS file (#800) to store the current version number of the package. This patch will initially set the VERSION field to "1.5."
- The CONDITION field in the REMINDER TERM (#811.5) and REMINDER DEFINITION (#811.9) files was moved to a separate node. It now has a maximum length of 225 characters instead of 52. Also the new field CONDITION CASE SENSITIVE was added to the FINDINGS multiple in the same two files. When this has a value of "NO," the condition evaluation will not be case-sensitive. The default is "YES."

- The new field EFFECTIVE DATE was added to the FINDINGS multiple in the REMINDER TERM (#811.5) and REMINDER DEFINITION (#811.9) files. A finding with a date older than the EFFECTIVE DATE will be treated as false. An updated version of the VA-HEP C RISK ASSESSMENT reminder definition is included. In this definition the EFFECTIVE PERIOD of 2Y is replaced by an EFFECTIVE DATE of October 1, 1998.

3. Reminder Evaluation/Clinical Maintenance changes

- The Computed Finding VA-RACE was not returning the patient's race correctly. This was fixed. NOIS: CTX-0900-70341, WPB-0700-30774.
- Inpatient medications were not being found for drug findings. This was fixed. Drug finding evaluations were made more efficient. This also requires Outpatient Pharmacy patch PSO*7*54. NOIS: BRX-0900-12529.
- The code that calls the TIU object expansion was passing a pointer to the INSTITUTION file (#4) instead of the required HOSPITAL LOCATION file (#44). It was fixed. NOIS: FGH-0700-32788.
- When there was no match between any of the baseline age ranges and the patient's age, making the reminder N/A due to age, the output was still appearing in the Clinical Maintenance component even if IGNORE ON N/A was set. This was fixed.
- Locking of expanded taxonomies was made more robust. It no longer generates an error when it fails to get a lock. It now produces a "no lock" message. NOIS: CHA-0900-30869.
- A display of Problem List priorities (acute or chronic) was added in the Clinical Maintenance output. NOIS: UNY-0900-12325
- The wildcard form of IGNORE ON N/A was not working correctly when the reminder was N/A because the PATIENT COHORT LOGIC evaluated to false. This was fixed. NOIS: HOU-1100-72053
- A term with more than one drug finding was not always working correctly. This was fixed. NOIS: SAG-1200-40405
- A change was made in the calculation of the resolution date for complex resolutions. Previously, the most recent date was used. Now, if two findings are ANDed, the oldest date is used. If two findings are ORed, the most recent date is used. If the logic is complex, then the date is determined by using the above rules. NOIS: HIN-0900-40246, WRJ-0101-11399.

- When a health factor without a category, which is a required field, was encountered during the reminder evaluation, it caused a null subscript error. Now when a health factor without a category is encountered, a warning message will be sent to the user and the reminders mailgroup (if the mailgroup is defined). The health factor will be ignored in the reminder evaluation and the null subscript errors will be eliminated. NOIS: UNY-0900-10369
- When set, the IGNORE ON N/A field was suppressing the Summary component output in addition to the Maintenance component. It should suppress only the Maintenance component output. It now works correctly.
- The CONDITION field can now be used with all finding types. Previously, all drug findings, radiology procedures, and taxonomies would not allow the use of CONDITION because there is no value for these findings. These findings still do not return a value to test against, but there is now a standard set of variables that can be used in all CONDITIONS. These variables are:
 - PXRMAGE - patient's age
 - PXRMDOB - patient's date of birth in FileMan format
 - PXRMRACE - patient's race (this is the text from the RACE file)
 - PXRMSEX - patient's sex, in the format M^MALE or F^FEMALE
- When there was no reminder frequency, the error message “Patient does not meet any age criteria” was displayed instead of “There is no reminder frequency.” NOIS: MAC-0201-61450
- For a historical encounter, the internal entry number of the Institution file was displayed instead of the station number. A change was made to display the station number. NOIS: BUT-0201-22423.
- The format of the “Applicable” header, which groups together patients found in the patient cohort logic, was changed because it was causing some confusion. An example of how it now reads is:
 - Applicable: Due every 1 year of 50 and older within cohort.
 The words “within cohort” were added to emphasize that this age range only applies to those patients in the cohort. If the reminder is N/A, the header is suppressed.

4. Reminder List Option changes

- When doing a Reminder List, typing a ^ at a prompt caused an undefined error instead of taking the user to the previous prompt. This was fixed. NOIS: HUN-0700-21914, HUN-1100-22185, SFC-1100-60475.

5. Reminder Dialog changes

- Dialog elements with sequence numbers >100 created by generating dialogs for reminders with >20 findings couldn't be edited unless the sequence number was first changed to <100. This is corrected and additional validation is also included to prevent the entry of duplicate sequence numbers. NOIS: MIA-1100-32057, WPB-0800-30571.
- A dialog group could be entered as a dialog element within itself. The result was that stack errors were generated when running the reminder dialog containing the group multiple. The REMINDER DIALOG file (#801.41) is corrected so that a dialog group may no longer be entered as a dialog element within itself. NOIS: SLC-0800-52045 and WAS-0700-21656
- Autogenerated dialog elements for contraindicated immunizations included an additional prompt - PXRМ VISIT DATE - that was not displayed in the reminder dialog. This is corrected so that the PXRМ VISIT DATE prompt displays in the reminder dialog. NOIS: HUN-1000-21282
- Dialog elements for exams occasionally displayed a code value instead of the exam name in the encounter window of the reminder dialog. This is corrected to show the exam name. NOIS: SPO-1000-52529
- Editing dialog groups within the CV option of reminder dialogs now uses the same editor as is used for reminder dialogs. Dialog group elements may be edited, copied/renamed, or deleted. It is no longer necessary to build component dialog elements before building the dialog group. Elements may be created from within the dialog group screen. NOIS: WIC-1000-42229
- A problem was reported where the reminder categories in CPRS GUI display the wrong reminders. This is corrected. NOIS: SDC-1000-61815
- If a reminder taxonomy was created after the installation of the Clinical Reminders package, selectable codes were not generated for the taxonomy dialog. This is changed so that taxonomy dialog edit will auto-create the selectable codes if none exist. NOIS: CHA-1100-30888
- If multiple web sites were entered for a reminder and the first 30 characters of the URLs were the same, only the first of the web sites would display in the "reference information" section of the GUI. This is corrected. NOIS: MAC-1100-60409

- The GROUP ENTRY field of the REMINDER DIALOG file (#801.41) used for dialog groups is extended to allow a new code:

3 None or One Selection

- The forced value “PXRM REPEAT CONTRAINDICATED” released with the reminder package had the default value incorrectly set to “yes.” As a result, the contraindicated field in PCE was not being updated. This is corrected by setting the default value to 1.
- Dialog copy of additional prompts now allows the prompt to be changed into a forced value if the prompt updates PCE or Vitals data. NOIS HVH-1200-11111.
- Dialog edit screens now return to the selection screen from which the edit was initiated. NOIS: PUG-1200-52077
- CPRS Lookup Categories now display sub-categories in display order and show the display sequence number. NOIS: PUG-0101-50004
- The edit template for dialog groups (PXRM EDIT GROUP) now allows additional prompts for a group level finding to be excluded from progress note text. NOIS: WAS-0700-21999

6. Reminder Reports:

- The Reminders Due Report displays “See below” if future appointments exist outside of the selected location and the “Display All Future Appointments” option is being used. NOIS: FAR-1000-42813

Related NOIS

BRX-0900-12529	HUN-1000-20744	SDC-1000-61815
BUT-0201-22423	HUN-1000-21282	SFC-1100-60475
CHA-0900-30869	HUN-1000-22185	SLC-0800-52045
CHA-1100-30888	HVH-1200-11111	SPO-1000-52529
CIN-0900-42457	LAH-0101-60194	UNY-0900-10369
CTX-0900-70341	MAC-1100-60338	UNY-0900-12325
EKH-1000-42980	MAC-1100-60409	V01-0201-N0005
FAR-0800-40686	MAC-0201-61450	WAS-0700-21656
FAR-1000-42813	MIA-1100-32057	WAS-0700-21999
FGH-0700-32788	PHI-0101-20893	WIC-1000-42229
HIN-0900-40246	PUG-1200-52077	WPB-0700-30744
HOU-1100-72053	PUG-0101-50004	WPB-0800-30571
HUN-0700-21914	SAG-1200-40405	WRJ-0101-11399

PXRM*1.5*3 – Reminder Expanded Taxonomy Delete

The EXPANDED TAXONOMIES file (#811.3) may have been rebuilt incorrectly during installation of the DRG Grouper Version 18.0 software, because the install of the ICD package deleted the globals for ICD Operation/Procedure (#80) and ICD Diagnosis (#80.1). If a reminder evaluation using a taxonomy was performed at that time, the EXPANDED TAXONOMY list for that taxonomy would be rebuilt with no codes or with an incomplete set. The impact of this is that reminders that include the taxonomy as a finding item don't evaluate correctly.

This patch must be loaded if the DRG Grouper Version 18.0 software has already been loaded. If the DRG Grouper Version 18.0 software has not yet been loaded, this patch should be loaded *immediately* after the DRG Grouper globals have been loaded.

The EXPANDED TAXONOMIES file is rebuilt whenever a taxonomy is edited or one of the source files has changed since the expansion was last done. The source files are ICDO, ICD9, and ICPT.

The post-install routine in this patch deletes the entries in the EXPANDED TAXONOMIES file (811.3). The entries in the EXPANDED TAXONOMIES file will be added as reminders using the codes are evaluated, either through the use of health summaries or on the CPRS coversheet.

Related NOIS

HUN-1200-20319
PAL-1200-60270
WAS-1200-20463
WIM-1200-20088

PXRM*1.5*4 – Reminder Dialog changes for V15 CPRS

This patch works in conjunction with many changes that have been made to reminder dialog resolution in CPRS v15 to make it easier for clinicians to resolve reminders in Notes or Summaries. *See the section, CPRS Reminder Configuration, later in this manual for descriptions of the changes listed below.*

Three new options have been added to the CPRS Reminder Configuration Menu [PXRM CPRS CONFIGURATION]:

- New Reminder Parameters [PXRM NEW REMINDER PARAMETERS] allows a user to modify the ORQQPX NEW REMINDER PARAMS parameter, which controls the parameters used to store cover sheet reminders.
- Default Outside Location [PXRM DEFAULT LOCATION] allows the default outside location for reminder dialogs to be specified at user, service, division or system level.
- Position Reminder Text at Cursor [PXRM TEXT AT CURSOR] allows the position reminder note text at cursor feature to be enabled at user, service, division, or system levels.

This patch also allows PXRM MENTAL HEALTH ACTIVE and PXRM GUI REMINDERS ACTIVE parameters to be selected by service.

NOIS Messages:
PUG-1000-51088

CPRS GUI v15 Reminders Enhancements

See the section, CPRS Reminder Configuration, later in this manual for descriptions of the changes listed below.

New Cover Sheet Reminder List Option

Users who are allowed access to the PXRM CPRS CONFIGURATION menu are allowed to modify the new reminder cover sheet parameters from within the CPRS GUI. This feature is available from the Edit Cover Sheet Reminder List menu option, under the Action menu of the Reminder Tree dialog. This dialog can be accessed even when the New Reminder Parameters setting is No, allowing for the setup of reminders before actually turning them on.

Reminders entered through this dialog are stored in the ORQQPX COVER SHEET REMINDERS and ORQQPX COVER SHEET REM CLASSES parameters. Since these parameters contain coded data, it is important that these parameters are not edited directly (they should only be modified through this dialog). Note that the cover sheet reminders entered through this dialog will only be active on the cover sheet if the ORQQPX NEW REMINDER PARAMS parameter is set.

Templates

The new templating features give Reminders managers more power and flexibility for setting up different kinds of dialog screens for resolving reminders.

Reminder dialogs (not reminders) can be linked to templates, so that a reminder dialog can be selected from the templates drawer (reminder-specific text will not be inserted into the note when the Finish button is pressed). This enables templates to create orders, enter encounter data, vitals, and do everything else that a reminder dialog can do. When a template is defined as a reminder dialog type, a list of reminder dialogs contained in the TIU TEMPLATE REMINDER DIALOGS parameter is then available in the template editor that can be linked to that reminder dialog. This multiple-valued parameter can be set at the User, Service, Division, and System levels. Unlike most other parameters, this parameter is cumulative, in that reminder dialogs specified at any level can be linked to a template.

For more information about template functionality, see the demonstration on the Software Development & Design (SD&D) Clinician Desktop Project Notebook page:

http://tspr.vista.med.va.gov/warboard/ProjectDocs/ClinD_Maint/CPRSTemplating.zip

Other Changes

- Two new reminders categories are available: Not Applicable & All Evaluated
- You can specify which Categories will be displayed in the reminder tree view
- You can enter Vitals Date/Time and Service Connected information with a Dialog Visit Info button
- Required prompts in dialogs are now marked with an *
- You can use Default Outside Locations (defined in a new parameter – see previous page on patch 4 options)
- A non-proportional font is now used in reminder dialogs
- Reminder dialog-generated text can be inserted at the current cursor location rather than at the bottom of the note, if a new parameter is set (see previous page on patch 4 options)
- Visit Date Reminder Dialog Additional Prompts with a default value of 0 (zero) will not default to the current year (the year will be blank).
 - 0 - no year is initially set (forces required dates to be entered)
 - M - Month is required
 - M0 - Month is required, no year initially set
- Icon Legend – a non-modal dialog box that shows icons and their meanings can be opened and retained during a working session

PXRM*1.5*5 – Exchange Utility

The Clinical Reminders Exchange Utility provides a mechanism for exchanging reminder definitions and dialogs among sites within a VISN or throughout the VA. This exchange helps to support national and VISN-wide guidelines by standardizing the reminder definitions used. It also simplifies the process for creating reminder definitions and dialogs.

Patch 5 provides a new and improved version of the exchange utility that was distributed with Clinical Reminders through PCE. The original reminder exchange allowed reminder definitions to be packed directly into host files or MailMan messages and passed to other sites. At the receiving site, the components in the packed reminder could be installed by processing the entire list.

In the new version, reminder definitions are first packed into the Exchange File (#811.8) in XML format. A packed reminder or Exchange File entry contains reminder definitions, reminder findings, and reminder dialogs. Everything that is needed by the reminder to function is included. Whenever an installation is done, a history of the installation details is retained in the Exchange File.

Host file and MailMan messages are used to exchange packed reminders. Each host file or MailMan message may contain multiple packed reminders. At the receiving site, the incoming host file or MailMan message is loaded into the Exchange File. Each packed reminder in the host file or MailMan message creates a new entry in the Exchange File.

Exchange File entries may be selected for installation. Furthermore, components of the packed reminder may be selected individually for installation (for example, a dialog group within the reminder dialog). Whenever an installation is done, a history of the installation details is retained in the Exchange File. Reminder dialogs are installed with the disabled field set to “DISABLED IN REMINDER EXCHANGE.” Computed findings and the associated M routines are also included in the packed reminder, but may only be installed by users with programmer access.

Order dialogs (quick orders) will be treated like findings that are not transportable, for example lab tests. You will see them in the list so you will know they are used by the dialog but they will not be selectable for installation. When you install the dialog you will be given the opportunity to replace the quick order with a local one or delete it from the dialog.

Reminder File and Option Changes

1. The following fields have been added to reminder files 801.41, 811.2, 811.4, 811.5, and 811.9:
 - *Class*: The class of the entry. Entries whose class is National can't be edited.
N NATIONAL
V VISN
L LOCAL
 - *Sponsor*: The name of a group or organization that sponsors the entry. This is a pointer to a new file, 811.6, Reminder Sponsor, introduced by this patch. Sponsor also has a Class, which must match the Class of the entry that points to the Sponsor.
 - *Review date*: Determines when the entry should be reviewed to verify that it is current with the latest standards and guidelines.
 - *Edit history*: At the end of a reminder entry edit, the edit history will be prompted if the entry has changed.
2. A new field, Usage, has been added to file 811.9, Reminder Definition. Its purpose is to allow the reminder creator to specify how the reminder can be used. This is a free-text field that can contain any of the following characters:
 - C - CPRS (the reminder can be used in the CPRS GUI)
 - R - Reminder Reports (the reminder can be used in reminder reports)
 - X - Reminder Extracts (the reminder is used for data extraction)
 - * - The reminder can be used for any of the above

NOTE: Complete implementation of this functionality will require a future CPRS patch that changes the way the reminder selection tools work. You can enter these codes now, and they won't cause any problems, but they also won't have any effect until the CPRS patches are implemented.
3. A new menu, Reminder Sponsor Management, has been added that allows you to enter, edit, or list sponsors for reminder definitions.
4. Three new options have been added to the Reminder Information Only menu:
 - TRL List Reminder Terms
 - TRI Inquire about Reminder Term
 - SL List Reminder Sponsors

Reminder Dialog Changes

1. The following obsolete fields are removed:

- Exchange date
- Last edit date
- Autogenerate date

This affects inquiry screens for reminder dialogs, dialog groups, dialog elements, additional prompts, forced values, result elements, and result groups.

2. The dialog edit option has been modified to allow dialog elements to be renamed even if they are used elsewhere (NOIS: PUG-0101-50058).
3. The dialog edit process now allows optional entry of 'ORDERABLE ITEM' on dialog elements (NOIS; ASH-0501-30504).
4. The processing of "EXCLUDE FROM P/N" field on dialog groups has been modified so that this only applies to the group header text. Individual elements in the group must now be marked "EXCLUDE FROM P/N" individually using the ED option in the group edit. All existing dialogs are automatically converted by the patch install.

Other Fixes

This patch also contains fixes for some problems reported by NOIS and discovered during testing.

1. The cross-reference on the URL field of the WEB multiple of the Reminder Definition file, data element 811.9002,.01, was only 30 characters long, even though the field has a maximum length of 128. Whenever two or more entries matched through the first 30 characters, selecting the correct entry was very difficult. The cross-reference has been changed to have the full 128-character length. Now when the user is doing a selection, the full URL is seen. NOIS: PUG-0201-50190
2. A new field, CHECKBOX SEQUENCE, has been added to dialog prompts. Previously, comment fields were created by adding prompt PXR COMMENT to the dialog element. Each checkbox for the comment field then had to be created as an individual prompt and added to the dialog element. This process generated a large number of dialog components. Because it is desirable to minimize the number of dialog components being transferred in dialog exchange, a new simpler method has been created.

The PXR COMMENT prompt is copied to a new prompt (e.g. INJECTION SITE) and multiple checkboxes can be added to the prompt using the new field's CHECKBOX SEQUENCE.

Example:

CHECKBOX SEQUENCE	TEXT
1	Right Deltoid
2	Left Deltoid

The new prompt (e.g. INJECTION SITE) is then added to the dialog element. PXR COMMENT is not required on the element.

This does not affect dialogs created by the previous method.

3. The option "Do you want to edit now" after copying a reminder dialog is removed. Instead the list of dialogs for the reminder is displayed.
4. Dialogs beginning with VA- or having a national class can no longer be edited.
5. When the patient's age did not fall in any of the age ranges specified in the definition, the incorrect error message "There is no reminder frequency" was displayed in the Clinical Maintenance output. Also IGNORE ON N/A set to "A" would not suppress the Clinical Maintenance output. This has been corrected. NOIS: HUN-0401-22538.
6. If a cancelled lab result came after a completed result, the cancelled result was used, making the finding false. Now lab results will be scanned and the most recent result that is not cancelled or pending will be used. NOIS: WAS-0501-20895.
7. A bug was discovered that could cause omission of some inpatient medications for drug findings. A new field, RXTYPE, has been added to the finding multiple of file 811.5, Reminder Term, and file 811.9, Reminder Definition. This field applies only to drug findings. It allows you to choose whether the medication is inpatient, outpatient, or both. The default is both, which is consistent with the current behavior.
8. If a hard error occurred during reminder evaluation, the patient cache may have been left locked. Code was added to PXR MERRH to make sure that the patient cache gets unlocked.

Changes to the Exchange Utility – January 2002

The following changes to Reminder Exchange are included in Patch 7 (PXRМ*1.5*7, Clinical Reminders MST Functionality):

If local findings have been mapped to terms or dialogs, the local finding mappings are retained when a new version of the term or dialog is loaded into the system. This applies to both reminders loaded as a patch and reminders loaded from mail messages.

Reminder terms retain the existing mappings and add any new findings imported on the term. Dialog components retain the existing mappings and ignore the incoming mappings.

You will no longer get a MailMan message telling you that a term or a dialog was skipped during the patch install.

PXRM*1.5*6 Reminder Reports

The patch contains fixes and minor enhancements to the Reminder Reports menu, including options that allow allocation of report templates to individual users, and a new report of review dates for reminder package files.

Enhancements

1. Combined report option for multiple facilities (E3R - 15489)
2. Combined report option for multiple locations.
3. Full SSN displayed (E3R – 15490)
4. Options to total summary reports with duplicates suppressed (E3R – 15489)
5. Selection of reminder categories or reminders (E3R – 15489)
6. Allow allocation of report templates to individual users (E3R – 15492)
7. Option to sort inpatient reports by ward/bed (E3R – 14847)
8. Delimiter separated output format (E3R – 15489)
9. Report of Review Dates

Fixes

1. Mandatory changes for mailman patch XM*117
2. Fix for occasional crashes in long reports.
BRX-1000-12842
TAM-0101-32041
MAC-0201-60752
3. Fix for allocation errors in large team reports.
MAC-0201-60753
DAY-0101-42348
4. Re-release of corrected reminder taxonomy VA-BREAST TUMOR. Duplicate codes are removed.
TAM-0901-30568

Details of Enhancements

1. Combined Report for Multiple Facilities

If more than one facility is selected, the following prompt is displayed:

```
Select FACILITY: SALT LAKE CITY//                660
Select another FACILITY: 550 DANVILLE, IL        550
Select another FACILITY:
Combined report for all facilities : N//Y
```

If a combined report is selected, a single report is printed for all facilities. The locations/clinics with the same name at different facilities are combined. Combined report and total criteria are now displayed on the report. The combined report is only available for the detailed report option. For the summary report, you can use totals to combine locations. The report also removes any duplicated patients.

2. Combined Report for Multiple Locations

The report by location has been changed. If more than one location, clinic group, or clinic stop is selected, the following prompt is displayed:

```
Determine encounter counts for: HS// Selected Hospital Locations

LOCATION: GENERAL MEDICINE      ANDERSON,CURTIS
Select another LOCATION: ONCOLOGY      ANDERSON,CURTIS
Select another LOCATION:

Combined report for all Locations : N//Y
```

If a combined location report is selected, a single report is printed for all selected locations within a facility. Conversely, the reports for all locations may now be split by location. The option to run a combined location report is available in the combined facility report if locations with more than one name are selected.

3. Full SSN displayed

On the detailed report, you can choose to display either long or short SSN now.

```
Print full SSN: N// y YES
```

If long SSN is selected but a patient is also an employee, then only the short SSN is displayed.

A new field 'FULL SSN' was created in file #800 and is installed by this patch as value N. This is the default for the Reminder Due Report. If required, this can be modified to N if short SSN is the norm for a site. Patients who are employees (based on patient type #391 or patient eligibility #361 in the PATIENT file) will display the short SSN even if the full SSN display is selected. There is a new parameter in parameter file #800, which may be changed to allow the full SSN to display. The parameter name is TRUNCATE EMPLOYEE SSN and is set to Y(es) at install.

4. Option to Print Totals

The summary report allows totals to be printed for the **summary report**. The following prompt is displayed after reminder selection:

```
Select one of the following:
  N      Normal report
  R      Report with additional totals
  T      Totals only report
REPORT TOTALS: N//
```

At the end of each facility section, a totals page is displayed. Duplicate entries are removed.

5. Selection of Reminder Categories

The prior version of reports allowed selection of reminders individually. This version allows selection of reminder categories, individual reminders, or both. The following prompts are displayed:

```
TYPE OF REPORT: S// <Enter> ummary
Select a REMINDER CATEGORY:  DIABETIC REMINDERS
...OK? Yes// <Enter>   (Yes)
Select another REMINDER CATEGORY: <Enter>
Select individual REMINDER:  AGETEST REMINDER
```

All reminders in a category are evaluated and due reminders are reported separately in the same format as reminders selected individually. On the summary report, reminders are sorted in name order.

6. Allocation of Report Templates to Users

A new menu option, PXRM REPORT TEMPLATES (USER), has been created, to allow allocation of templates to individual users. A new menu option, PXR M REMINDERS DUE (USER), was created, which allows a user to produce a reminders due report. The user can only run reports from templates allocated to them in the PXR M REPORT TEMPLATES (USER) option; the new option doesn't allow users to edit or create templates or run reports without a template.

```
Select Reminder Managers Menu Option: RP  Reminder Reports

  D      Reminders Due Report
  R      Reminders Due Report (User)          [PXR M REMINDERS DUE (USER)]
  U      User Report Templates              [PXR M REPORT TEMPLATES (USER)]
  T      Extract EPI Totals
  L      Extract EPI List by Finding and SSN
  V      Review Date Report
```

7. Option to Sort Inpatient Reports by Ward/Bed

If a detailed inpatient report is run, the following prompts are displayed:

```

TYPE OF REPORT: S// D Detailed
Display All Future Appointments: N// <Enter> O
Sort by Inpatient Location/Bed: N//Y

```

If the sort by location/bed option is selected, the report will display the patients in ward/bed order. Note that the default is to display patients in name order, showing the Next Appt. column in place of the Ward/Bed column.

Example:

```

Clinical Reminders Due Report - Detailed Report
Facility: TAMPA, FL 673
Reminders due 6/28/2001 - 7N for CURRENT INPATIENTS
report -Pneumovax Due: 4 patients have reminder due

```

		Date Due	Last Done	Ward/Bed
		-----	-----	-----
1	KXXXXX,DXXXX (XXX-XX-XXXX)	DUE NOW	N/A	A - 1
2	MXXXXXX,FRANK JR (XXX-XX-XXXX)	DUE NOW	N/A	A - 2
3	PXXXXXX,BART A (XXX-XX-XXXX)	DUE NOW	N/A	A - 3
4	WXXXXXXXXX,LOUIS (XXX-XXXXXX)	DUE NOW	N/A	Unspecified

```

Report run on 19 patients.
Applicable to 16 patients.

End of the report.

```

8. Delimiter Separated Output Format

This new reports feature allows you to create condensed reports for import into spreadsheet tables. Headings are suppressed. The option allows a delimiter character to be specified (similar to the EXCEL option Data/Get External Data/Import Text):

```

Print Delimiter Separated output only: N// y YES
Select one of the following:
    C      Comma
    M      Semicolon
    S      Space
    T      Tab
    U      Up arrow
Specify REPORT DELIMITER CHARACTER: U//<Enter> p arrow
DEVICE: HOME// <Enter> ANYWHERE Right Margin: 80// <Enter>

TITLE:COMBINED REPORT TEMPLAT^TEMPLATE:ELY/SLC/ISC ADVA
START:12/26/2000^END:12/21/2001^RUN:12/21/2001 12:12:59 pm
^^INDIVIDUAL LOCATIONS ONLY

0^ISC-SLC-A4 6023_CARDIOLOGY^^

```

```

1^Enter pain score vitals/measurement^0^0^CARDIOLOGY
2^Advanced Directives Education^46^41^CARDIOLOGY
3^Pain Assessment^0^0^CARDIOLOGY
0^PATIENTS^47^^CARDIOLOGY

0^ISC-SLC-A4 6023_DIABETIC EDUCATION-INDIV-MOD B^^
1^Enter pain score vitals/measurement^0^0^DIABETIC EDUCATION-INDIV-MOD B
2^Advanced Directives Education^21^19^DIABETIC EDUCATION-INDIV-MOD B
3^Pain Assessment^0^0^DIABETIC EDUCATION-INDIV-MOD B
0^PATIENTS^21^^DIABETIC EDUCATION-INDIV-MOD B

0^ISC-SLC-A4 6023_GENERAL MEDICINE^^
1^Enter pain score vitals/measurement^0^0^GENERAL MEDICINE
2^Advanced Directives Education^26^23^GENERAL MEDICINE
3^Pain Assessment^0^0^GENERAL MEDICINE
0^PATIENTS^26^^GENERAL MEDICINE

End of the report. Press ENTER/RETURN to continue...

```

The above example is a summary report with totals for two individual OE/RR teams. Report headings are suppressed, but for each section of the report, there are 0 prefixed records indicating the team name and the total patients. On the detailed report, the applicable total is also included.

9. Report of Review Dates

A new report option, PXR REVIEW DATES, has been added to the reports menu. This allows review dates up to and including a selected cutoff date to be reported for the reminder package files.

```

Select Reminder Managers Menu Option: RP Reminder Reports

  D      Reminders Due Report
  R      Reminders Due Report (User)
  U      User Report Templates
  T      Extract EPI Totals
  L      Extract EPI List by Finding and SSN
  V    Review Date Report                                [PXR REVIEW DATES]

Select Reminder Reports Option: V Review Date Report

  Select one of the following:

      C      Computed Finding
      D      Reminder Dialog
      R      Reminder Definition
      T      Reminder Taxonomy

Select File to Review: R// <Enter> eminder Definition

Enter Review Cutoff Date: Jun 28, 2001//JUN 30, 2001

```

DEVICE: <Enter> ANYWHERE Right Margin: 80//<Enter>

REMINDERS TO REVIEW (up to Jun 30, 2001) JUN 28,2001 14:21 PAGE 1
NAME REVIEW DATE

JG DIABETIC EYE EXAM MAY 3,2000
SLC CANCER SCREEN MAY 1,2001
TEST EXCHANGE CHANGES MAY 2,2001
TEST EXCHANGE (NEW) MAY 2,2001
JG-CHOLESTEROL SCREEN (F) JUN 12,2001

PXRM*1.5*7 Clinical Reminders MST Functionality

This patch provides new functionality for Clinical Reminders that will help sites meet the mandate to collect Military Sexual Trauma (MST) data.

For background information on MST and detailed installation and setup instructions, see the Installation and Setup Guide for this patch.

This patch exports a new reminder definition, VA-MST SCREENING, and the findings used by the definition. The findings include

- Three reminder terms:
MST DECLINES REPORT
MST NEGATIVE REPORT
MST POSITIVE REPORT

- Two computed findings:
VA-MST STATUS
VA-VETERAN

- Four health factors:
MST CATEGORY
MST DECLINES TO ANSWER
MST NO DOES NOT REPORT
MST YES REPORTS

- One reminder dialog:
VA-MST SCREENING

The reminder dialog has three elements that update PCE with health factor findings, MST NO DOES NOT REPORT, MST YES REPORTS and MST DECLINES TO ANSWER. Individual elements in the reminder dialog may be modified to use local findings.

As of version 17 of the CPRS GUI, patch OR*3.0*116, you will be able to capture data directly to the MST HISTORY file, #29.11, using this reminder dialog.

If your site is already capturing MST data via health factors, education topics, or exams, functionality in this patch will help you synchronize this data with the data in the MST HISTORY file, #29.11.

This patch adds a new option to the Reminder Managers Menu called Reminders MST Synchronization Management. There are two options on this menu: one for doing the synchronization (Reminders MST Synchronization), and one for checking on the synchronization (Reminders MST Synchronization Report).

The VA-MST SCREENING reminder has dual sponsorship. This patch changes the REMINDER SPONSOR file (#811.6) and the Sponsor management tools to accommodate this. A Sponsor for an individual item may consist of a list of associated sponsors. Fields to store contact information (name, phone number, etc.) are now available in the REMINDER SPONSOR file.

An enhancement to dialog edit is also included in this patch. If a reminder dialog or dialog group is deleted within the Reminder Dialog option, any components of the dialog that are not used elsewhere will be listed and the option given to delete all these components.

Changes to Reminder Exchange

If local findings have been mapped to terms or dialogs, the local finding mappings are retained when a new version of the term or dialog is loaded into the system. This applies to both reminders loaded as a patch and reminders loaded from mail messages.

Reminder terms retain the existing mappings and add any new findings imported on the term. Dialog components retain the existing mappings and ignore the incoming mappings.

You will no longer get a MailMan message telling you that a term or a dialog was skipped during the patch install.

Additional fixes

In addition to support for MST, this patch provides fixes to some problems raised on NOIS messages.

1. In some cases error messages were being sent to the user even if a mail group to receive the errors was defined. Now they won't receive these error messages. NOIS FAR-0701-40609.
2. An undefined variable error sometimes occurred when using the Exchange Utility to install a Reminder Sponsor or a Mental Health Instrument finding, which was fixed by this patch. NOISes HIN-0901-40428 and DEN-0901-52465.
3. When adding 3 months to the date 10/01/2001 the result came back as 13/1/2001. This problem is fixed by this patch. NOIS ALB-1001-50136, HIN-1101-41689, MAC-1001-60088.

4. In the Exchange Utility, if you selected the IA (install all) action and did a quit, then returned to the IA, it would immediately quit. This problem is fixed by this patch. NOIS HIN-1101-41310.

NOIS Messages:

=====

ALB-1001-50136
DEN-0901-52465
DAY-1001-40760
FAR-0701-40609
HIN-0901-40428
HIN-1101-41310
HIN-1101-41689
ISA-1101-10704
MAC-1001-60088
UNY-1001-12245

CPRS GUI v16 Reminders Enhancements

The following changes in CPRS can affect Reminders usage through CPRS.

CPRS EXTENSIONS / COM OBJECTS

You can now link external applications to CPRS without changing the CPRS GUI source code. These applications are known as COM objects (COM is a Microsoft acronym for Component Object Model). This allows vendors and sites to create GUI tools that execute when specific events occur within CPRS. These events are: selecting a patient, accepting an order, and using a template. The specific rules for creating external applications are available in Appendix F of the *CPRS Technical Manual*.

COM objects must be installed on a workstation before they can be used. Further, details about COM objects must be entered in the OE/RR COM OBJECTS file (#101.15) before CPRS can use them.

Linking COM Objects to Templates

In order to assign COM objects to events in CPRS, changes have been made to the template file. Users who are allowed to edit shared templates can link COM objects to templates. These templates will appear with a special icon indicating that they are linked to an external application (the icon legend has been updated accordingly). When a template linked to a COM object is used, the associated COM object will be called, and the text returned from the COM object will be scanned for template fields. If a regular template is used, text from the COM object will be inserted into the template. This functionality can be used to link commercial note writing tools to CPRS.

TEMPLATES / TITLES / REASONS FOR REQUEST

Three special template root folders, Document Titles, Consult Reasons for Request, and Procedure Reasons for Request have been added in this release. These new root folders appear at the same level as the Shared Templates root folder. These folders are only visible to users who can edit shared templates and who are also members of the user class specified in the EDITOR CLASS field (#.07) (template file #8927) of each of these special folders (initially set to the CLINICAL COORDINATOR user class).

Templates contained in these folders can be linked to document titles, consult reasons for request (by service), or procedure reasons for request (by procedure). This allows CPRS to automatically use a template (boilerplates, dialogs, reminder dialogs, and COM Objects) when a document title is selected or a consult or procedure order is placed (including quick orders). ***However, reminder dialogs that are linked to templates can only be associated with document titles that are used on the Notes or Consuls tabs.***

CPRS GUI v17 Reminders Enhancements

CPRS GUI Version 17 (OR*3*116) includes mandated changes for the Co-Pay project. The changes will allow collection of exemptions (such as service connection, ionizing radiation, agent orange, etc.) with medication orders. The information will be collected at the time the orders are signed to minimize the impact on ordering providers. In addition, changes for Military Sexual Trauma (MST) are included. PXR*1.5*7 will interface with the CPRS MST features to populate the national MST History File.

Clinical Reminders and CPRS

See the *Clinical Reminders Clinician Guide* for more detailed descriptions of processing reminders in CPRS.

Clinicians now have many more interactive capabilities in using Clinical Reminders through the CPRS GUI. They first view reminders on the Cover Sheet. A snapshot view of procedures or actions that are due can be seen. Clinicians can take action on reminders from the Notes and Consults tabs. They can easily record information that “resolves” the reminder by checking off one of many resolution choices.

New Clinical Reminder Files Supporting GUI Processing

To enable the above capabilities, the Clinical Reminders package has been redesigned and enhanced with new files and parameters. These require setup by coordinators and technical staff at the medical centers, to allow maximum flexibility and local applicability.

Reminder Categories

- Allows flexible grouping of reminders
- Provides lists of reminders for selection based on a new Reminder Category parameter
- Useful for reporting

Reminder Finding Parameters

- Used to autogenerate reminder dialog for finding items in a reminder definition
- Allows sites to define which default parameters to use for each finding type and resolution status, such as prefix and suffix text to use to create sentences for the progress note
- Additional prompts to ask when the sentence is checked off

Reminder Dialog

- Stores the reminder dialog set that is used by the CPRS GUI to process a reminder
- Stores dialog sentences for finding items from the reminder definition, and their additional prompts
- Populated by autogeneration tools for a reminder
- Allows coordinators to define their own dialogs and modify autogenerated dialog entries for reminder resolution.

Clinical Reminder Statuses

When you look at the reminder output in CPRS and in Health Summaries, you will see a reminder status. The status is determined by evaluation of the PATIENT COHORT LOGIC and/or RESOLUTION LOGIC. These logic strings in turn depend on the other fields in the reminder definition, which are stored in the REMINDER DEFINITION file #811.9. The descriptions in the table below explain what each of the possible statuses mean.

Status	Description
DONE	When the final frequency for a reminder is 99Y (99 years), it is done once in a lifetime. When reminders with this frequency are resolved, they have the special status of DONE.
DUE NOW	There are two conditions that can make a reminder DUE NOW. The first is when the reminder has never been resolved in the past. The second is when the reminder has been resolved in the past but the amount of time specified by the final REMINDER FREQUENCY has been met or exceeded. For example, if the reminder was last resolved 18 months ago and the frequency is one year, the reminder is DUE NOW. If the frequency was 2 years, the status would be RESOLVED.
DUE SOON	The field DO IN ADVANCE TIME FRAME is used to let a reminder become due earlier than the date determined, by adding the frequency to the date when the reminder was last resolved. For example, if the frequency is 1Y (one year) and the DO IN ADVANCE TIME FRAME is 1M (one month), the reminder would have a status of DUE SOON beginning 11 months after it was last resolved. After one year has passed, the status would be DUE.
ERROR	This status is returned when there is an error that prevents the reminder from being properly evaluated. Depending upon how a site chooses to set things up, a MailMan message containing details of the error will be sent either to a mailgroup or the user. The error will also be put into the error trap.
N/A	A reminder is N/A (non-applicable) if the patient is not in the cohort or group of patients to which this reminder applies. The PATIENT COHORT LOGIC provides a precise description of the cohort. Examples of Findings that can be used to determine the cohort include sex, age, and diagnosis. The remaining resolution statuses apply only to reminders that are applicable.
NEVER	This status applies only to reminders that are resolved by an immunization. Immunizations can be marked as contraindicated in the V IMMUNIZATION file. When this is the case, the reminder will have the status of NEVER.
RESOLVED	A reminder is given a status of RESOLVED when all the criteria in the RESOLUTION LOGIC have been met and the amount of time specified by the reminder frequency has not passed. The criteria can be simple, such as having an immunization, or complex, such as an order for an inhaler and inhaler use education.

Section II – Implementing Clinical Reminders

Introduction

Implementing Clinical Reminders at your site is an ongoing process. Clinical and management groups need to evaluate the needs of your site. They should review and prioritize the clinical guidelines that need to be implemented at your site. The clinical reminders your site uses will probably change over time. For example, a new clinical guideline may require one or more new clinical reminders. When a reminder becomes outdated, it may be inactivated.

- Clinical Reminders Version 1.5 must be installed at your site.
- The basic **VISTA** infrastructure needs to be in place. Clinical Reminders searches for information relevant to the patient in data created by other **VISTA** packages. These packages include Mental Health, Lab, Order Entry, Patient Care Encounter (PCE), Pharmacy, PIMS, Radiology, and Vitals. The reminders can be displayed using the **VISTA** packages Health Summary, AICS, or CPRS.
- Determine the needs of your site – review and prioritize the clinical guidelines that need to be implemented at your site
- Once you have determined there is a need for a particular clinical reminder, create and test a reminder definition.
- To use a reminder, you must set it up to be available in the appropriate application. You may want it on a health summary for a specific clinic or on the CPRS GUI cover sheet for particular users. Several parameters must be set for those applications.
- If reminders will be resolved through Progress or Consults Notes in CPRS, you will need to create dialogs and link them to reminders.

Chapter 1: Defining Clinical Reminders

Overview

The Reminder Definition file has been simplified in Clinical Reminders V. 1.5, so that the target finding, health factor, computed findings and taxonomies are now all grouped together under a single “findings” multiple. Existing reminders are converted to the new format automatically when Version 1.5 is installed.

The reminder edit process has been modified to display all existing findings and then allow selection of findings by finding type. For existing reminders, it is no longer necessary to step through the entire reminder definition to make a change to an individual field. For the selected reminder, a sub-menu is displayed that allows selection of specific fields in the reminder definition for editing.

Defining a Working Clinical Reminder

There are two parts to creating a working clinical reminder.

- *Reminder definition:* This describes the patients the reminder applies to, how often it is given, and what resolves or satisfies the reminder.
- *Process Issues:* The process issues include who will use the reminder and how the data will be captured. The process issues are extremely important; if they are not worked out, the reminder will never function as intended, even if the definition is correct.

Steps to Define a Working Reminder

These are the basic steps for defining a reminder. More detailed instructions for creating reminders and dialogs are provided in chapters that follow.

1. Write the reminder definition in a narrative form that clearly describes what you want the reminder to do.

Use the reminder narrative to identify patient data you need and how to capture it. Determine what characteristics the reminder will have (make a list). Which patients will the reminder be applicable for: age ranges, sex, diagnoses, etc. What satisfies the reminder and what makes it not applicable: diagnoses, lab results, x-rays, education, etc.

Reminders provide answers to the basic questions:

- WHO (findings and patient cohort logic)
- WHAT resolves the reminder (findings and resolution logic)
- WHAT supporting information (findings that are not patient cohort and not resolution logic)
- WHEN (frequency)
- WHERE this reminder will likely be resolved (location/provider)

Example: Diabetic Eye Exam

Diabetic patients should have a diabetic eye exam done yearly.

2. Review existing reminders to see if there is an existing reminder that is close to what you need.
List Reminder Definitions, Reminder Definition Management Menu
Inquire about a Reminder Definition, Reminder Definition Management Menu
3. Create new findings if they are required. For example, you may need exams or health factors.
Option: PCE Table Maintenance on Other Supporting Menus
4. Copy the existing reminder and edit it to meet your needs, or define a new reminder.
Copy Reminder Definition or *Add/Edit Reminder Definition*, Reminder Definition Management Menu
5. Test your reminder definition by evaluating the reminder for test patients. You should have patients who are in the cohort and who are not in the cohort. For patients who are in the cohort, you should have some who have the reminder resolved and some who do not.
Options: Test Reminder on the Reminder Management Menu, Health Summary Coordinator's Menu; *Clinical Maintenance* in CPRS;

6. Create a reminder dialog (following instructions in the Reminder Dialog section of this manual), if desired, for resolving the reminder in CPRS.
7. Once you are certain the reminder works as intended, set it up in one or more of the following applications:
 - a. Add it to a health summary
 - b. Add it to an encounter form
 - c. Within CPRS :
 1. Add it to the CPRS GUI Cover Sheet Reminders List
 2. Add it to CPRS Lookup Categories

Using Clinical Reminders and Clinical Reminder Dialogs in the CPRS GUI requires certain parameters to be set; for example: **CPRS Lookup Categories, GUI Resolution parameter, and Mental Health dialog resolution parameter.**

Options: Health Summary Coordinator's Menu, CPRS Reminder Configuration menu

Steps 1 - 3 are described in this chapter. Steps 5 – 7 are described in succeeding chapters.

See Appendix A for a checklist and an example of defining a reminder and creating a dialog.

Detailed Steps To Define A Working Reminder

The following pages show examples of performing the steps for defining a reminder using the options on the Reminder Definition Manager menu.

Step 1. Write the definition in narrative format.

Diabetic patients should have a diabetic eye exam done yearly.

Step 2. Review existing reminders, using the List Reminder Definitions and Inquire About Reminder Item options.

List Reminder Definitions (RL)

This option prints a summary of reminder definitions. You can limit the list by several criteria: all reminders, all national reminders, all local reminders, print name, or .01 name.

Example: List Reminder Definitions by National Reminders

NOTE: All the reminder definitions between the first one and Diabetic Eye Exam are deleted from this example, for brevity's sake.

```
RL      List Reminder Definitions
RI      Inquire about Reminder Definition
RE      Add/Edit Reminder Definition
RC      Copy Reminder Definition
RA      Activate/Inactivate Reminders
Select Reminder Definition Management Option: RL List Reminder Definitions
List all reminders? Y// NO
List all local reminders? Y// NO
List only reminders starting with (prefix)? VA-// <Enter>
List Active (A), Inactive (I), Both (B)? B//<Enter> oth
Sort list by Name (N), Print Name (P)? N//<Enter> ame (.01)

A reminder list will be created using the following criteria:
List all reminders? NO
List all local reminders? NO
List only reminders starting with (prefix)? VA-
List Active (A), Inactive (I), Both (B)? Both
Sort list by Name (N), Print Name (P)? Name (.01)

Is this correct? Y// <Enter>ES
DEVICE: <Enter> ANYWHERE      Right Margin: 80// <Enter>
```

List Reminder Definitions, cont'd

REMINDER DEFINITION LIST	MAR 2,2000 10:21	PAGE 1

Name:	VA-*BREAST CANCER SCREEN	
Print Name:	Breast Cancer Screen	
Class:	NATIONAL	
Sponsor:		
Review Date:		
Usage:	CPRS	
Priority:		
Reminder Description:	Mammogram should be given every 2 years to female patients, ages 50-69.	
	The "VA-*Breast Cancer Screen" reminder is based on the following "Breast Cancer Detection" guidelines specified in the VHA HANDBOOK 1101.8, APPENDIX A.	
	Target Condition: Early detection of breast cancer.	
	Target Group: All women ages 50-69.	
	Recommendation: All women ages 50-69 should receive a mammogram every two years.	
	Goals for FY2000: At least 60% of women ages 50-69 have received a mammogram within the preceding two years.	
Findings:	Finding Item: VA-MAMMOGRAM/SCREEN (FI(1)=TX(16))	
	Finding Item: INACTIVATE BREAST CANCER SCREE (FI(2)=HF(42))	
	Finding Item: ACTIVATE BREAST CANCER SCREEN (FI(3)=HF(43))	
Default PATIENT COHORT LOGIC to see if the Reminder applies to a patient:	(SEX)&(AGE)&'FI(2)	
Expanded Patient Cohort Logic:	(SEX)&(AGE)&'FI(INACTIVATE BREAST CANCER SCREEN)	
Default RESOLUTION LOGIC defines findings which can resolve the Reminder:	FI(1)	
Expanded Resolution Logic:	FI(VA-MAMMOGRAM/SCREEN)	

.		
.		
.		

Name:	VA-DIABETIC EYE EXAM	
Print Name:	Diabetic Eye Exam	
Priority:		

List Reminder Definitions, cont'd

Reminder Description:

Patients with the VA-DIABETES taxonomy should have a diabetic eye exam done yearly.

Findings:

Finding Item: DIABETIC EYE EXAM (FI(1)=EX(3))

Finding Item: VA-DIABETES (FI(2)=TX(28))

Default PATIENT COHORT LOGIC to see if the Reminder applies to a patient:

(SEX)&(AGE)&FI(2)

Expanded Patient Cohort Logic:

(SEX)&(AGE)&FI(VA-DIABETES)

Default RESOLUTION LOGIC defines findings that resolve the Reminder:

FI(1)

Expanded Resolution Logic:

FI(DIABETIC EYE EXAM)

^

Inquire About Reminder Item (RI)

After reviewing reminder definitions with the List Reminder Definitions, you can select a specific reminder to see all the details.

NOTE: As a result of changes in Patch 2, only the fields in the findings multiple that have entries (non-null) will be printed.

```
Select Reminder Definition Management Option: RI Inquire about Reminder Definition
Select Reminder Definition: VA-DIABETIC EYE EXAM
DEVICE: <Enter> ANYWHERE Right Margin: 80// <Enter>
```

```
REMINDER DEFINITION INQUIRY                               Jun 21, 2001 11:06:10 am Page 1
-----
VA-DIABETIC EYE EXAM                                     No. 17
-----
Print Name:                                             Diabetic Eye Exam
Class:                                                 NATIONAL
Sponsor:
Review Date:
Usage:                                                 CPRS
Related VA-* Reminder:
Reminder Dialog:
Priority:

Reminder Description:
  Patients with the VA-DIABETES taxonomy should have a diabetic eye exam
  done yearly.

Technical Description:
  This reminder is based on the Diabetic Eye Exam reminder from the New
  York VAMC which was designed to meet the guidelines defined by the PACT
  panel. Additional input came from the Saginaw VAMC.

Edit History:

Baseline Frequency:
  Do In Advance Time Frame: Do if DUE within 1 month
  Sex Specific:
  Ignore on N/A:
  Frequency for Age Range: 0Y - Not Indicated for all ages
  Match Text:
  No Match Text:

Findings:

  Finding Item: DIABETIC EYE EXAM (FI(1)=EX(3))
```

Inquire about Reminder Definition, cont'd

```
Finding Type: EXAM
Use in Resolution Logic: OR

Finding Item: VA-DIABETES (FI(2)=TX(28))
Finding Type: REMINDER TAXONOMY
Match Frequency/Age: 1 year for all ages
Use in Patient Cohort Logic: AND
Found Text: Diabetic eye exam required annually for all
             diabetic patients. with HTN.
Not Found Text: No history of diabetes on file.

General Patient Cohort Found Text:

General Patient Cohort Not Found Text:

General Resolution Found Text:

General Resolution Not Found Text:

Default PATIENT COHORT LOGIC to see if the Reminder applies to a patient:
(SEX)&(AGE)&FI(2)

Expanded Patient Cohort Logic:
(SEX)&(AGE)&FI(VA-DIABETES)

Default RESOLUTION LOGIC defines findings that resolve the Reminder:
FI(1)

Expanded Resolution Logic:
FI(DIABETIC EYE EXAM)

Web Sites:
```

Step 3. Copy the reminder you wish to use as a basis for your local reminder, and edit it as necessary. Use either the Copy Reminder Definition or Add/Edit Reminder Definition option.

Copy Reminder Definition (RC)

This option allows you to copy an existing reminder definition into a new reminder definition in the REMINDER DEFINITION file (#811.9). The original reminder definition to be copied is selected first. You will then be prompted for a new unique name. Once a new name is defined for the new reminder definition, the new reminder definition can be edited.

Several predefined reminder definitions were distributed with the PCE package, based on the Ambulatory Care EP Preventative Health Maintenance Guidelines. Nationally distributed reminder definitions items all have a "VA-" prefix. VA- for Ambulatory Care EP reminders and VA-* for National Center for Health Promotion reminders.

Sites may change anything in a local reminder definition to meet their needs. Findings at each site may require modification to represent local use of clinical data. Multiple findings can be entered.

NOTE: The reminder edit process has been modified so that all existing findings are displayed first and then you can select findings by finding type. For existing reminders, it is no longer necessary to step through the entire reminder definition to make a change to an individual field. For the selected reminder, a sub-menu is displayed that allows selection of specific fields in the reminder definition for edit.

Copy Reminder Definition Example

NOTE: See page 33 for descriptions of each of the prompts (fields).

```
Select Reminder Definition Management Option: RC Copy Reminder Definition

Select the reminder item to copy: VA-DIABETIC EYE EXAM
PLEASE ENTER A UNIQUE NAME: JG-DIABETIC EYE EXAM
The original reminder VA-DIABETIC EYE EXAM has been copied into JG-DIABETIC EYE
EXAM.
Do you want to edit it now? YES
  Select one of the following:
    A      All reminder details
    G      General
    B      Baseline Frequency
    F      Findings
    L      Logic
    D      Reminder Dialog
    W      Web Addresses
Select section to edit: All reminder details
```

Copy Reminder Definition, cont'd

NAME: JG-DIABETIC EYE EXAM Replace

PRINT NAME: Diabetic Eye Exam// <Enter>

Class: NATIONAL

Sponsor: <Enter>

Review Date: <Enter>

Usage: C//

RELATED REMINDER GUIDELINE: <Enter>

INACTIVE FLAG: <Enter>

REMINDER DESCRIPTION:

- 1>Patients with the VA-DIABETES taxonomy should have a diabetic eye exam
- 2>done yearly.

EDIT Option: <Enter>

TECHNICAL DESCRIPTION:

- 1>This reminder is based on the Diabetic Eye Exam reminder from the New
- 2>York VAMC which was designed to meet the guidelines defined by the PACT
- 3>panel. Additional input came from the Saginaw VAMC.

EDIT Option: <Enter>

PRIORITY: 3

Baseline Frequency

DO IN ADVANCE TIME FRAME: 1M// <Enter>

SEX SPECIFIC: <Enter>

IGNORE ON N/A: <Enter>

Baseline frequency age range set

Select REMINDER FREQUENCY: 0Y// <Enter>

REMINDER FREQUENCY: 0Y// <Enter>

MINIMUM AGE: <Enter>

MAXIMUM AGE: <Enter>

AGE MATCH TEXT:

1><Enter>

AGE NO MATCH TEXT:

1><Enter>

Select REMINDER FREQUENCY: <Enter>

Findings

Choose from:

EX DIABETIC EYE EXAM

TX VA-DIABETES

Select FINDING: TX.VA-DIABETES _____

Searching for a REMINDER TAXONOMY, (p
VA-DIABETES Diabetic diagnosis codes
...OK? Yes// <Enter> (Yes)

NOTE: When editing findings in a reminder definition or term, you can save time by giving an exact specification of the name of the finding by using the abbreviation, followed by a period, then the finding name. This tells FileMan exactly where to find it and avoids long searches. See page 36 for a list of abbreviations for findings types.

Copy Reminder Definition, cont'd

```
FINDING ITEM: VA-DIABETES// <Enter>
MINIMUM AGE: <Enter>
MAXIMUM AGE: <Enter>
REMINDER FREQUENCY: 1Y// <Enter>
RANK FREQUENCY: <Enter>
USE IN RESOLUTION LOGIC: <Enter>
USE IN PATIENT COHORT LOGIC: AND// <Enter>
EFFECTIVE PERIOD: <Enter>
EFFECTIVE DATE: <Enter>
USE INACTIVE PROBLEMS: <Enter>
CONDITION: <Enter>
CONDITION CASE SENSITIVE: <Enter>
FOUND TEXT:
  1>Diabetic eye exam required annually for all diabetic patients.
  2>with HTN.
EDIT Option: <Enter>
NOT FOUND TEXT:
  1>No history of diabetes on file.
EDIT Option: <Enter>
Select FINDING: <Enter>

Patient Cohort and Resolution Logic
CUSTOMIZED PATIENT COHORT LOGIC (OPTIONAL): (SEX)&(AGE)&FI(SLC DIABETES)GENERAL
PATIENT COHORT FOUND TEXT:
  1><Enter>
GENERAL PATIENT COHORT NOT FOUND TEXT:
  1><Enter>
CUSTOMIZED RESOLUTION LOGIC (OPTIONAL): <Enter>
GENERAL RESOLUTION FOUND TEXT:
  1><Enter>
GENERAL RESOLUTION NOT FOUND TEXT:
  1><Enter>

Reminder Dialog
LINKED REMINDER DIALOG: <Enter>

Web Addresses for Reminder Information
Select URL: <Enter>

  Select one of the following:
    A      All reminder details
    G      General
    B      Baseline Frequency
    F      Findings
    L      Logic
    D      Reminder Dialog
    W      Web Addresses

Select section to edit: <Enter>
Select Reminder Management Option: <Enter>
```

Add/Edit Reminder Definition

You can define a reminder through this option or through the Copy Reminder Definition, as described on preceding pages.

The reminder edit process has been modified so that all existing findings are displayed first and then you can select findings by finding type. For existing reminders, it is no longer necessary to step through the entire reminder definition to make a change to an individual field. For the selected reminder, a sub-menu is displayed that allows selection of specific fields in the reminder definition for edit.

Editing part of the reminder definition.

This is an example of editing Logic.

```
Select Reminder Definition Management Option: RE Add/Edit Reminder
Definition
Select Reminder Definition: JG-DIABETIC EYE EXAM
  Select one of the following:
    A      All reminder details
    G      General
    B      Baseline Frequency
    F      Findings
    L      Logic
    D      Reminder Dialog
    W      Web Addresses

Select section to edit: Logic

Patient Cohort and Resolution Logic
CUSTOMIZED PATIENT COHORT LOGIC (OPTIONAL): (SEX)&(AGE)&FI(SLC
DIABETES)
GENERAL PATIENT COHORT FOUND TEXT:
  1> <Enter>
GENERAL PATIENT COHORT NOT FOUND TEXT:
  1><Enter>
CUSTOMIZED RESOLUTION LOGIC (OPTIONAL): FI(DIABETIC EYE EXAM)
GENERAL RESOLUTION FOUND TEXT:
  1><Enter>
GENERAL RESOLUTION NOT FOUND TEXT:
  1><Enter>
```

Reminder Definition Fields

Name	Description
NAME	This field is the name of a clinical reminder definition. Nationally distributed reminder definition names are prefixed with "VA -". The VA -prefixed reminder definitions cannot be altered by a site, but may be inactivated so they will not be selectable.
PRINT NAME	This is the name that is used when the results of a reminder evaluation are displayed.
CLASS	This is the class of definition. National definitions cannot be edited or created by sites.. N NATIONAL V VISN L LOCAL
SPONSOR	This is the name of a group or organization that sponsors the reminder.
REVIEW DATE	The review date is used to determine when the definition should be reviewed to verify that it is current with the latest standards and guidelines.
EDIT HISTORY	If changes were made, the date and the name of the user making the changes will be inserted automatically. You can optionally type in a description of the changes made during the editing session.
USAGE	This field allows the reminder creator to specify how the reminder can be used. This is a free text field that can contain any combination of the following characters: C - CPRS (the reminder can be used in the CPRS GUI) R - Reminder Reports (the reminder can be used in reminder reports) X - Reminder Extracts (the reminder is used for data extraction) * - The reminder can be used for any of the above NOTE: To enter more than one code, type the codes with no spaces or punctuation between them.
RELATED REMINDER GUIDELINE	If this local reminder replaces an NCHP related reminder, then identify the related NCHP reminder here. The National Center for Health Promotion (NCHP) has identified reminders that must be tracked at local facilities and reported on to Congress. The reminders that address the NCHP reminders are prefixed with "VA -*". These reminders may be used in the Health Summary Components, or replaced by a local reminder that also satisfies the NCHP guideline.
INACTIVE FLAG	Reminders that are inactive will not be evaluated. The Clinical Maintenance component will return a message stating the reminder is inactive and the date when it was made inactive. Other applications that use reminders may use this flag to determine if a reminder can be selected for inclusion.
REMINDER DESCRIPTION	This is a description of the clinical purpose of the reminder.
TECHNICAL DESCRIPTION	This is a description of how the reminder works.
PRIORITY	The reminder priority is used by the CPRS GUI for sorting purposes.
DO IN ADVANCE TIME FRAME	This field is used to let a reminder become due earlier than the date determined by adding the frequency to the date when the reminder was last resolved. For example, if the frequency is 1Y (one year) and the DO IN ADVANCE TIME FRAME is 1M (one month) the reminder would have a status of "DUE SOON" 11 months after it was last resolved. After one year has passed the STATUS would be "DUE."

Reminder Definition Fields, cont'd

Name	Description
SEX SPECIFIC	This field is used to make a reminder sex-specific. If an "F" is entered, the reminder applies only to females. If an "M" is entered, the reminder applies only to males. If it is left blank, then the reminder is applicable to either sex.
IGNORE ON N/A	<p>This field allows the user to stop reminders from being printed in the Clinical Maintenance component if the reminder is N/A. This is a free-text field that can contain any combination of the following codes:</p> <p>Code Description</p> <p>A N/A due to not meeting age criteria.</p> <p>I N/A due to inactive reminder.</p> <p>R N/A due to the wrong race.</p> <p>S N/A due to the wrong sex.</p> <p>* N/A for any reason.</p>
FREQUENCY AGE RANGE SET	<p>The Frequency Age Range set is a multiple that allows you to define different frequencies for different non-overlapping age ranges. The fields in this multiple are:</p> <p>REMINDER FREQUENCY: This is the frequency to give the reminder. It is input as nD, nM, or nY, where D stands for days, M for months, Y for years, and n is a number. Thus, for a reminder that is to be given once a year, the values 365D, 12M, or 1Y would all work. If a reminder is only to be given once in a lifetime, use a frequency of 99Y.</p> <p>MINIMUM AGE: This field specifies the minimum age for defining an age range associated with a frequency. Leave it blank if there is no minimum age.</p> <p>MAXIMUM AGE: This field specifies the maximum age for defining an age range associated with a frequency. Leave it blank if there is no maximum age.</p> <p>AGE MATCH TEXT: This text will be displayed in the Clinical Maintenance component if the patient's age falls in the age range.</p> <p>AGE NO MATCH TEXT: This text will be displayed in the Clinical Maintenance component if the patient's age does not fall in the age range.</p>
FINDING	The Findings multiple is documented later in this chapter.

Name	Description
CUSTOMIZED PATIENT COHORT LOGIC	<p>(Optional)</p> <p>This field may be used to define a customized Boolean logic string that defines how and what findings in a reminder should be used to determine if the reminder applies to the patient. The customized logic is used when the USE IN PATIENT COHORT LOGIC fields associated with each finding do not provide the ability to create the required logic string. (e.g., grouping various findings within parenthesis)</p> <p>Tip: Before defining the Boolean string, review the default logic defined in the DEFAULT PATIENT COHORT LOGIC field using the reminder inquiry option.</p>
GENERAL PATIENT COHORT FOUND TEXT	This text is displayed in the Clinical Maintenance component if the patient is in the cohort and the reminder is applicable.
GENERAL PATIENT COHORT NOT FOUND TEXT	This text will be displayed in the Clinical Maintenance component if the patient is not in the cohort and the reminder is not applicable.
CUSTOMIZED RESOLUTION LOGIC	<p>(Previously USE IN DATE DUE CALC)</p> <p>This field may be used to define a customized Boolean logic string that defines how and what reminder findings should be used to determine if the reminder has been resolved. The customized logic is used when the USE IN RESOLUTION LOGIC fields associated with each finding do not provide the ability to create the required logic string. (e.g., grouping various findings within parenthesis)</p> <p>Tip: Before defining the Boolean string, review the default logic defined in the DEFAULT RESOLUTION LOGIC field using the reminder inquiry option.</p> <p>Boolean Operators AND (&), AND NOT (&'), OR (!), OR NOT (!')</p> <p>The package uses these to build the logic strings Example FI(1)&(FI(3)!FI(7))</p>
GENERAL RESOLUTION FOUND TEXT	This text will be displayed in the Clinical Maintenance component if the reminder has been resolved.
GENERAL RESOLUTION NOT FOUND TEXT	This text will be displayed in the Clinical Maintenance component if the reminder has not been resolved.
LINKED REMINDER DIALOG	This is the Reminder Dialog that will be used when the reminder is processed in the CPRS GUI.
WEB SITES	This multiple contains Web site(s) for information related to this reminder. When processing a reminder in the CPRS GUI you will be able to launch a browser and visit the Web site.
Select URL	This is the URL for the web site.
WEB SITE TITLE	This is the web site title that is used by the CPRS GUI. It will appear after a right-click, allowing you to select the web site.
WEB SITE DESCRIPTION	This field contains a description of the Web site.

Reminder Findings

Findings are the heart of the reminder definition. Findings have three functions in reminder definitions:

- To select the applicable patient population (Patient Cohort Logic),
- To resolve the reminder (Resolution Logic), and
- For informational purposes.

Findings Types

Finding Type	Source File Number	Abbreviation
Drug	50	DR
Education Topic	9999999.09	ED
Exam	9999999.15	EX
Health Factor	9999999.64	HF
Immunization	9999999.14	IM
Laboratory Test	60	LT
Mental Health Instrument	601	MH
Orderable Item	101.43	UI
Radiology Procedure	71	RP
Reminder Computed Finding	811.4	CF
Reminder Taxonomy	811.2	TX
Reminder Term	811.5	RT
Skin Test	9999999.28	ST
VA Drug Class	50.605	DC
VA Generic	50.6	DG
Vital Measurement	120.51	VM

 **TIP:** When editing findings in a reminder definition or term, you can save time by giving an exact specification of the name of the finding by using the abbreviation. This tells FileMan exactly where to find it and avoids long searches.

Example

For finding: VA-DIABETES taxonomy
Enter: TX.VA-DIABETES

Reminder Findings, cont'd

Drug –Drugs are found in the DRUG file #50. Drug information for a patient is obtained using a Pharmacy API. The date of a drug finding corresponds to the last day the patient has the drug. Therefore, these findings may have a date that is in the future. For outpatient drugs, the finding date is determined by taking the last release date and adding the day's supply. For inpatient drugs, the finding date is the stop date. If no date can be found the finding will be false. The date calculation is identical for all three of the drug-related findings: Drug, Drug Class, and VA Generic.

In many cases, you will want to use either the EFFECTIVE PERIOD or EFFECTIVE DATE with drug findings. For example:

- If you want to know if the patient had the drug within the last 45 days, you would use an EFFECTIVE PERIOD of "45D."
- If you want to know if the patient had taken the drug on or since October 1, 1998, use an EFFECTIVE DATE of October 1, 1998.
- If you want to know if the patient is on the drug today, use an EFFECTIVE PERIOD of "0D."
- If you want to know if the patient has ever taken the drug, then you would leave both the EFFECTIVE PERIOD and EFFECTIVE DATE blank.

STATUS is not used in evaluating drug findings, since it does not accurately reflect when the patient was actually taking the drug. For informational purposes, STATUS will be displayed on the Clinical Maintenance output for drug findings.

Education Topic – Education topics are found in the EDUCATION TOPICS file #9999999.09. Results for individual patients are found in the V PATIENT ED file #9000010.16. The value used for the CONDITION is LEVEL OF UNDERSTANDING. Possible values are:

- '1' FOR POOR;
- '2' FOR FAIR;
- '3' FOR GOOD;
- '4' FOR GROUP-NO ASSESSMENT;
- '5' FOR REFUSED

If you want to allow only those educations where the LEVEL OF UNDERSTANDING is GOOD to be true, the CONDITION field would be I V=3.

Exam – Exams are found in the EXAM file #9999999.15. Results for individual patients are found in the V EXAM file #9000010.13. The value used for the CONDITION is the RESULT. Possible values are:

- 'A' FOR ABNORMAL
- 'N' FOR NORMAL

Reminder Findings, cont'd

If you want only those exams where the RESULT is NORMAL to be true, the CONDITION field would be I V="N".

Health Factor – Health factors are found in the HEALTH FACTOR file #9999999.64. Results for individual patients are found in the V HEALTH FACTOR file #9000010.23. The value used for the CONDITION is LEVEL/SEVERITY. Possible values are:

'M' FOR MINIMAL

'MO' FOR MODERATE

'H' FOR HEAVY/SEVERE

If you want only those health factors whose LEVEL/SEVERITY is HEAVY/SEVERE to be true, then the CONDITION field would be I V="H".

Health Factors have a field called ENTRY TYPE. There are two possible values for this field: CATEGORY and FACTOR. Each factor health factor must belong to a category. This provides a way to group health factors. Examples of categories are alcohol use, breast cancer, and tobacco. When reminders are evaluated, if there is more than one health factor from a category in the definition, only the most recent health factor in the category can be true. This has several uses. One is to activate and inactive a reminder for a patient. You can use the inactivate health factor in the PATIENT COHORT LOGIC with a value of AND NOT. This will make it so any patient who has the inactivate health factor will be excluded from the cohort. When you need to reactivate the reminder for the patient, give the patient the activate health factor. Since it is more recent than the inactivate health factor and they are in the same category, it will take precedence and the inactivate health factor will be treated as false. Smoking is another example. If the patient is currently a smoker, the patient can be given a current smoker health factor. Reminders that apply only to smokers would use the current smoker health factor in the PATIENT COHORT LOGIC with a value of AND. If the patient quits smoking, he can be given a health factor of non-smoker. Since smoker and non-smoker are in the same category, the reminders for smokers will no longer apply to the patient.

When health factors are mapped to a Term, the categorization is done only for the health factors in the Term. The Term factors are not combined with health factors in the definition for the categorization.

The field WITHIN CATEGORY RANK will let you change this behavior. See that section for a description of how to use it.

Reminder Findings, cont'd

Only those Health Factors with an ENTRY TYPE of FACTOR can be used in reminder definitions. However, when you create a packed reminder definition using the reminder Exchange Utility, each factor health factor and its category health factor are included. This is done so that a receiving site can install the factor health factors used in the reminder definition. Factor health factors cannot be installed if their category health factor does not exist first. Category health factors should be installed before factor health factors.

Immunization – Immunizations are found in the IMMUNIZATION file #9999999.14. Results for individual patients are found in the V IMMUNIZATION file #9000010.11. The value used for the CONDITION is the SERIES. Possible values are:

- 'P' FOR PARTIALLY COMPLETE
- 'C' FOR COMPLETE
- 'B' FOR BOOSTER
- '1' FOR SERIES 1
- '2' FOR SERIES 2
- '3' FOR SERIES 3
- '4' FOR SERIES 4
- '5' FOR SERIES 5
- '6' FOR SERIES 6
- '7' FOR SERIES 7
- '8' FOR SERIES 8

Laboratory Test – Laboratory tests are found in the LABORATORY TEST file #60. Data for a test in the LABORATORY TEST file and a selected patient is found using a Lab API. Note that only individual tests in the chemistry/hematology node can be used for Clinical Reminders. The value for the CONDITION is the result returned by the lab test. The normal range of values and the units will be a function of the particular test.

Mental Health Instrument – Mental Health Instruments are found in the MENTAL HEALTH INSTRUMENT file #601. Data for a test in the MENTAL HEALTH INSTRUMENT file and a selected patient is found using a Mental Health API. The value for the CONDITION is the result returned by the Mental Health test. The normal range of values and the units will be a function of the particular test. When the user enters answers to a mental health test, the answers are automatically passed to the Mental Health package to calculate a result, which may be referenced as SCORE. For example, CAGE test has a SCORE from 1-4 and GAF has a SCORE from 1-99.

For most Mental Health tests, progress note text can be automatically generated that summarizes or includes the results (SCORE). Default text is distributed in the REMINDER DIALOG file # 801.41 for sites to use for each Mental Health test processed in the reminder resolution process. This text may be copied and modified to reflect the site's preferences for text. The default text is defined in Mental Health Result Dialog Elements.

Reminder Findings, cont'd

The reminder manager must add the Result Dialog Elements to the MH Instrument tests Dialog Element RESULT GROUP/ELEMENT field. This result dialog may define further processing to conditionally generate progress note text based on the SCORE.

Orderable Item – Orderable Items are found in the ORDERABLE ITEMS file #101.43. Data for an orderable item and a selected patient are found using an OE/RR API. If there are orders for the orderable item with a status of ACTIVE or PENDING, the finding will be true unless it has expired due to the EFFECTIVE PERIOD or EFFECTIVE DATE. The date used is the START DATE. If no ACTIVE or PENDING orders are found, then the one with the most recent date is used; however, by default, the finding will be false. You will need to use the CONDITION field to make findings that do not have a status of ACTIVE or PENDING true. The value for the CONDITION is the order status.

Possible order statuses are found in the ORDER STATUS file #100.01. These are:

discontinued	complete	hold
flagged	pending	active
expired	scheduled	partial results
delayed	unreleased	renewed
discontinued/edit	cancelled	lapsed
no status		

OE/RR displays these as lower-case and that is how the API returns them; ***therefore the CONDITION field must use lower-case***. For example if you want orders whose status is complete, then the CONDITION field should be I V="complete." Note: You can set the field CONDITION CASE SENSITIVE to NO to make the CONDITION not case-sensitive.

Radiology Procedure – Radiology procedures are found in the RAD/NUC MED PROCEDURES file #71. Data for a radiology procedure and a selected patient is found using a Radiology API. The status can be one of the following: CANCELLED, COMPLETED, IN PROGRESS, or NONE. Procedures with a status of CANCELLED or NONE are not used. Only COMPLETED procedures can cause the finding to be true. If there is an IN PROGRESS procedure that is more recent than a COMPLETED one, or there is no COMPLETED procedure, information about the IN PROGRESS procedure is displayed in the Clinical Maintenance component.

Reminder Findings, cont'd

Reminder Computed Findings – Reminder Computed Findings are found in the COMPUTED FINDINGS file #811.4. Computed findings provide the ability to create custom findings for situations when none of the standard findings will work.

See the section on Computed Findings later in this chapter for more details.

Exported computed findings

COMPUTED FINDING	VALUE	CONDITION Examples
VA-BMI	Patient's body mass index	I V>26
VA-DATE OF BIRTH	Patient's date of birth in FileMan format: 1/1/45 is represented as 2450101	I V>2450000 represents patients born 1945 and later.
VA-DATE OF DEATH	Patient's date of death in FileMan format. This will have a value only if the patient is deceased.	I V>2450101
VA-PRIMARY CARE PROVIDER	Patient's primary care provider. This is the name field from file #200, the NEW PERSON file.	
VA-PRIMARY CARE TEAM	Patient's primary care team. This is the name field from file #404.51, the TEAM file. If no primary care team has been assigned this will be null.	
VA-RACE	Patient's race. This will correspond to one of the entries in the name field of file #10, the RACE file. These will be in the form RACE.	I V["BLACK" Note: this would find all entries in the RACE file containing "BLACK."

NOTE: If there is no provider or no team, the finding will be false. If there is a provider or a team, you can use the Condition to screen for a specific one. Where there is a provider, the value for the Condition will be the .01 field from file 200. In other words, it will be the spelled out name.

Here is what an entry looks like:

```
^VA(200,15,0) = GREEN,JOANN^jg^XK[tv-sjm6l@syUndDU>^@^^^^^^^^^^^^^14
```

For the team, it will be the .01 from the team file.

Example:

```
^SCTM(404.51,85,0) = PRIMARY^801-588-2121^2^^1^1^6028^500^^0^0^0^0
```

If you want to find patients who do not have a primary provider, then test for the finding being false. The Use in Patient Cohort Logic should be AND NOT and the Condition should be removed.

Reminder Taxonomy – Reminder taxonomies are found in the REMINDER TAXONOMY file #811.2. Reminder taxonomies provide a convenient way to group coded values and give them a name. For example, the VA-DIABETES taxonomy contains a list of diabetes diagnoses.

A taxonomy can contain ICD0, ICD9, and CPT codes. The codes are entered as a low value and a high value. These pairs are automatically expanded into a set that contains the low value, the high value, and every code in between. Clinical Reminders searches in a number of places for code matches. For ICD9 codes, it looks in V POV, PROBLEM LIST, and PTF. For CPT codes, it looks in V CPT and Radiology. For ICD0 codes, it looks in PTF.

There are two dates associated with ICD9 diagnoses found in PROBLEM LIST. There is the date entered and the date last modified. The PRIORITY field is used to determine if a problem is chronic or acute. If the problem is chronic, Clinical Reminders will use today's date in its date calculations; otherwise it will use the date last modified. Problems that are "chronic" can never expire. Note that it only uses active problems unless the field USE INACTIVE PROBLEMS is yes.

The following are fields that can be specified for each taxonomy finding:

USE INACTIVE PROBLEMS – Normally, Problem List problems that are marked as inactive are ignored during the reminder evaluation. If you want them to be used, give this field a value of "YES."

PATIENT DATA SOURCE specifies where to search for patient data. It is a string of comma-separated key words. The keywords and their meanings are:

KEYWORD	MEANING
IN	Search in the inpatient data file PTF
INDXLS	Search in PTF for DXLS only
INPR	Search in PTF for principal diagnosis only
EN	Search encounter (PCE) data
ENPR	Search PCE data for primary diagnosis only
PL	Search for Problem List diagnosis only
RA	Search in Radiology for radiology CPT codes.

You may use any combination of these keywords. An example is EN,RA. This would cause the search to be made in V CPT and Radiology for CPT codes. If PATIENT DATA SOURCE is left blank, the search is made in all the possible sources.

See the section later in this chapter that describes Reminder Taxonomy options.

Reminder Findings, cont'd

Reminder Term – Reminder Terms are found in file #811.5. Reminder Terms provide a way to define a general term, for example diabetes diagnosis, which can be mapped to specific findings. A Reminder Term must be mapped to at least one finding before it can be used for reminder evaluation. A Reminder Term can be mapped to more than one finding. Reminder Terms can be mapped to any of the findings, except Reminder Terms, that can be used in a Reminder Definition.

Each node of the findings multiple in a term has the following fields: EFFECTIVE PERIOD, USE INACTIVE PROBLEMS, WITHIN CATEGORY RANK, CONDITION, MH SCALE, and RXTYPE. These fields work exactly the same as the fields with the same names in the findings multiple of the reminder definition. If one of these fields is specified at the definition findings level, where the term is the finding, then each finding in the term will inherit the value. If the field is specified at the finding level of the term, then it will take precedence and replace what has been specified at the definition level.

See the section later in this chapter that describes Reminder Term options.

Skin Test – Skin Tests are found in the SKIN TEST file #9999999.28. Results for individual patients are found in the V SKIN TEST file #9000010.12. The value used for CONDITION is RESULTS. Possible values are:

- 'P' FOR POSITIVE
- 'N' FOR NEGATIVE
- 'D' FOR DOUBTFUL
- 'O' FOR NO TAKE

If you want only those findings to be true for skin tests whose results are positive, the CONDITION would be I V="P".

VA Drug Class – VA Drug Class entries are found in the VA DRUG CLASS file #50.605. An entry from the VA Drug Class file points to one or more entries in the Drug file. Each of the corresponding entries in the Drug file is processed as described in the Drug section. The information displayed in the Clinical Maintenance component includes the VA Drug Class and the particular drug that was found.

VA Generic – VA Generic entries are found in the VA GENERIC file #50.6. (This was formerly called the National Drug file.) An entry from the VA Generic file points to one or more entries in the Drug file. Each of the corresponding entries in the Drug file is processed as described in the Drug section. The information displayed in the Clinical Maintenance component includes the VA Generic name and the particular drug that was found.

Reminder Findings, cont'd

Vital Measurement – Vital Measurement entries are found in the GMRV VITAL MEASUREMENT file #120.5. A Vitals API is used to obtain the information for a selected measurement and patient. The value for the CONDITION is RATE, which is the value of the measurement. If you are going to use a CONDITION with this finding, you need to be familiar with how the Vitals package returns the Rate data. For example, if the vital sign is weight, the Rate will be a number that is the weight in pounds. If the vital sign is blood pressure, the rate will have the form systolic/diastolic. If you want the finding to be true only for systolic pressures greater than 140, then the CONDITION would be I \$P(V,"/",1)>140. If you want it to be true for diastolic pressures greater than 90, the CONDITION would be I \$P(V,"/",2)>90. Finally, if you want it to be true for systolic pressures greater than 140 and diastolic pressures greater than 90, the CONDITION would be I (\$P(V,"/",1)>140)&(\$P(V,"/",2)>90).

Findings Fields

There are a number of fields in the Findings multiple that control how each Finding is used in the reminder evaluation process. Each of these fields is described in detail below. Note that each field is optional. If it is not present, the finding will not be used for the purpose of the field.

MINIMUM AGE, MAXIMUM AGE, and FREQUENCY – These are treated as a set that we can call a frequency age range set. If a finding is true then the frequency age range set will override the baseline frequency age range set. This is used when a finding should override the baseline. For example, a patient with a particular health factor needs to get the reminder at an earlier age than normal and it should be done more frequently.

RANK FREQUENCY – If more than one finding that has a frequency age range set is true, then how do we decide which frequency age range set to use? That is the purpose of the RANK FREQUENCY. The frequency age range set from the finding with the highest RANK FREQUENCY will be used. In the absence of RANK FREQUENCY, the frequency age range set that will cause the reminder to be given the most often will be used. RANK FREQUENCY is a numerical value with 1 being the highest.

Reminder Findings, cont'd

USE IN RESOLUTION LOGIC – This field specifies how a finding is used in resolving a reminder. It is a set of codes that can contain the Mumps Boolean operators and their negations. The operators are ! (OR), & (AND), !' (OR NOT), and &' (AND NOT). If a particular finding must be true in order for the reminder to be resolved, then you would use an AND in this field. If the finding is one of a number of findings that will resolve a reminder, then you would use an OR. For those cases where this mechanism does not allow you to describe the exact logical combination of findings you require, you can input the logic directly in the CUSTOM RESOLUTION LOGIC field.

USE IN PATIENT COHORT LOGIC – This field specifies how a finding is used in selecting the applicable patient population; i.e., the patient cohort. It is a set of codes that works exactly like the USE IN RESOLUTION LOGIC. For those cases where this mechanism does not allow you to describe the exact logical combination of findings you require, you can input the logic directly in the CUSTOM PATIENT COHORT LOGIC field.

EFFECTIVE PERIOD – This field lets you give a finding a finite lifetime. It is input in the standard time format of nD, nM, nY, where n is a number and D stands for days, M for months, and Y for years. Thus, to give a finding a lifetime of two years, you would input 2Y. If today's date is greater than the date of the finding plus the EFFECTIVE period, then the finding will be false. When this field is left blank, the finding will never expire.

EFFECTIVE DATE – The function of this field is similar to EFFECTIVE PERIOD only instead of specifying an amount of time a specific date is given. If the date of the finding is older than the EFFECTIVE DATE the finding will be false.

USE INACTIVE PROBLEMS – This field applies only to taxonomies containing ICD 9 diagnoses. If the diagnosis is found in the PROBLEM LIST and it is inactive, then the finding cannot be true unless this field is set to YES.

WITHIN CATEGORY RANK – This field applies only to health factors. In order to understand how it works, you need to understand how health factors work in the reminder evaluation process. If you are not clear about this, see the Health Factor section. The default is to use only the most recent Health factor within a category. A problem can arise if there are two or more Health factors within a category and they both have the same date. (This can happen if both Health factors are given during the same encounter.) When the dates are the same, the Health factor with the highest WITHIN CATEGORY RANK will be used. This is a numerical value like RANK FREQUENCY with 1 being the highest rank.

Reminder Findings, cont'd

In some cases, you may want to have a Health factor treated as an individual finding, suppressing the category behavior. To do this, use the special value of 0 for the WITHIN CATEGORY RANK.

CONDITION – Many types of findings have associated values. For example, for Education Topics, the value is Level of Understanding; for Vital Measurement, it is the value of the measurement. More specific information can be found in the detailed section for each finding type. The CONDITION field can be used to make the finding true or false depending on the value of the finding. The contents of this field are a single line of Mumps code that should evaluate to true or false. If the code evaluates to true, then the finding is true; if it evaluates to false, then the finding is false. The CONDITION value for each finding type is given in the following table.

PXRM*1.5*2: The CONDITION field now has a maximum length of 225.

CONDITION CASE SENSITIVE. When this field is set to "NO" then the CONDITION will not be case-sensitive. The default is case-sensitive.

Finding Type	Value
Drug	None
Education Topic	Level of Understanding
Exam	Result
Health Factor	Level/severity
Immunization	Series
Laboratory Test	Value
Mental Health Instrument	Raw score
Orderable Item	Status
Radiology Procedure	None
Reminder Computed Finding	Determined by the programmer
Reminder Taxonomy	None
Skin Test	Results
VA Drug Class	None
VA Generic	None
Vital Measurement	Rate

Reminder Findings, cont'd

In addition to the values for type of finding shown in the above table, the following variables can be used in any CONDITION:

PXRMAGE - patient's age

PXRMDOB - patient's date of birth in FileMan format

PXRMRACE - patient's race (this is the text from the RACE file)

PXRMSEX - patient's sex, in the format M^MALE or F^FEMALE

The use of these variables is very similar to how you use the V variable. For example, if you want the finding to apply only to patients who are 65 and younger, the CONDITION is I PXRMAGE'>65 (in English if AGE is not greater than 65). You can combine these new variables and the V in a CONDITION. Let's say we want a finding that is true for all patients whose BMI>25, were born before 1955, and whose race is Asian. Our finding is the BMI finding, so the CONDITION is (I V>25)&(PXRMDOB<2550101)&(PXRMRACE["ASIAN").

When using PXMRSEX in a CONDITION, you can use it a number of ways.

Examples:

I \$P(PXRMSEX,"^",1)="M" I \$P(PXRMSEX,"^",2)="MALE" I PXRMSEX["FE"

I \$P(PXRMSEX,"^",1)="F" I \$P(PXRMSEX,"^",2)="FEMALE" I PXRMSEX["FE"

The first set selects male patients while the second set selects female patients.

Reminder Findings Condition Table

Some examples of simple CONDITIONS are shown in the following table:

Finding Type	Results File	Result Fields that can be used in CONDITION	Data example	CONDITION field example
Drug (50)		NONE – but you can use EFFECTIVE PERIOD of 0D, 0M, OR 0Y in the reminder definition to restrict view to current medications only		
Education Topic (999999.09)	V PATIENT ED (9000010.06)	LEVEL OF UNDERSTANDING	1 for Poor 2 for Fair 3 for Good 4 for Group-no Assessment 5 for Refused	IV=1 IV=2 IV=3 IV=4 IV=5
Exam (999999.15)	V EXAM (9000010.13)	RESULT	A for Abnormal N for Normal	IV="A" IV="N"
Health Factor (999999.64)	V HEALTH FACTOR (9000010.23)	LEVEL/SEVERITY	M for Minimal MO for Moderate H for Heavy/Severe	IV="M" IV="MO" IV="H"
Immunization (999999.14)	V IMMUNIZATION (9000010.11)	SERIES	P for Partially Complete C for Complete B for Booster 1 for Series 1 2 for Series 2 3 for Series 3 4 for Series 4 5 for Series 5 6 for Series 6 7 for Series 7 8 for Series 8	IV="P" IV="C" IV="B" IV=1 IV=2 IV=3 IV=4 IV=5 IV=6 IV=7 IV=8
Laboratory Test (60)	LAB RESULTS in "CH" node	Number returned from the Lab API as the lab result	180	IV>130
Mental health Instrument (601)		RAW SCORE from API based on a scale	3 (CAGE)	IV>2
Orderable Item (101.43)				

MH Scale – This is applicable only to Mental Health Instrument findings. The scale can be selected by scale number or scale name.

Reminder Findings, cont'd

RXTYPE - This field is a set of codes that applies only to drug findings. It can be used to make the finding so it will use only inpatient or only outpatient drugs. If this field is empty, it will use both. The possible values are:

- B BOTH
- I INPATIENT
- O OUTPATIENT

FOUND TEXT – This is a word-processing field. The contents of this field will be displayed in the Clinical Maintenance component whenever the finding is found (true).

NOT FOUND TEXT – This is a word-processing field. The contents of this field will be displayed in the Clinical Maintenance component whenever the finding is not found (false).

Both FOUND TEXT and NOT FOUND TEXT can contain TIU objects.

Exported Reminders

A set of reminder definitions is distributed with the package. You can use them as examples and templates for creating your own reminders to meet local needs. As described earlier in this chapter, this is done by first copying the VA- reminder definition to a local definition and then editing the local definition. If the VA- reminder *does* meet your local needs, you can use it directly.

NOTE: The VA-* prefix indicates that the reminder was approved by the National Center for Health Promotion (NCHP). The VA- prefixed reminders were approved by the Ambulatory Care Expert Panel (now defunct).

```
VA-*BREAST CANCER SCREEN
VA-*CERVICAL CANCER SCREEN
VA-*CHOLESTEROL SCREEN (F)
VA-*CHOLESTEROL SCREEN (M)
VA-*COLORECTAL CANCER SCREEN (FOBT)
VA-*COLORECTAL CANCER SCREEN (SIG.)
VA-*FITNESS AND EXERCISE SCREEN
VA-*HYPERTENSION SCREEN
VA-*INFLUENZA IMMUNIZATION
VA-*PNEUMOCOCCAL VACCINE
VA-*PROBLEM DRINKING SCREEN
VA-*SEATBELT AND ACCIDENT SCREEN
VA-*TETANUS DIPHTHERIA IMMUNIZATION
VA-*TOBACCO USE SCREEN
VA-*WEIGHT AND NUTRITION SCREEN
VA-ADVANCED DIRECTIVES EDUCATION
VA-ALCOHOL ABUSE EDUCATION
VA-BLOOD PRESSURE CHECK
VA-BREAST EXAM
VA-BREAST SELF EXAM EDUCATION
VA-DIABETIC EYE EXAM
VA-DIABETIC FOOT CARE ED.
VA-DIABETIC FOOT EXAM
VA-DIGITAL RECTAL (PROSTATE) EXAM
VA-EXERCISE EDUCATION
VA-FECAL OCCULT BLOOD TEST
VA-FLEXISIGMOIDOSCOPY
VA-HEP C RISK ASSESSMENT
VA-INFLUENZA VACCINE
VA-MAMMOGRAM
VA-NATIONAL EPI LAB EXTRACT
VA-NATIONAL EPI RX EXTRACT
VA-NUTRITION/OBESITY EDUCATION
VA-PAP SMEAR
VA-PNEUMOVAX
VA-PPD
VA-PSA
VA-SEATBELT EDUCATION
VA-TOBACCO EDUCATION
VA-WEIGHT
```

Reminder Taxonomies

Taxonomies are coded data that use ICD or CPT codes. Reminder taxonomies provide a convenient way to group coded values and give them a name. For example, the VA-DIABETES taxonomy contains a list of diabetes diagnoses. Options on the Taxonomy Management Menu let you view and edit taxonomy definitions.

Taxonomy Management Menu

Synonym	Option	Option Name	Description
TL	List Taxonomy Definitions	PXRM TAXONOMY LIST	Use this option to get a summary of all the taxonomies on your system. It shows the name of the taxonomy and the low and high codes for each of the possible code types.
TI	Inquire about Taxonomy Item	PXRM TAXONOMY INQUIRY	This option provides a detailed report of a Taxonomy item's definition, with a list of all the ICD0, ICD9, and CPT codes included in the taxonomy.
TE	Edit Taxonomy Item	PXRM TAXONOMY EDIT	This option is used to edit Reminder Taxonomy Item definitions.
TC	Copy Taxonomy Item	PXRM TAXONOMY COPY	This option allows the user to copy an existing taxonomy definition into a new taxonomy entry in the REMINDER TAXONOMY file (#811.2).

Taxonomy Fields

NAME	DESCRIPTION
NAME	This is the name of the taxonomy. It must be unique. Nationally distributed taxonomies start with "VA-".
BRIEF DESCRIPTION	This is a brief description of what the taxonomy represents. This may be used to further define the intended use of this taxonomy.
CLASS	This is the class of the entry. Entries whose class is National cannot be edited or created by sites. N NATIONAL V VISN L LOCAL
SPONSOR	This is the name of a group or organization that sponsors the taxonomy.
REVIEW DATE	The review date is used to determine when the entry should be reviewed to verify that it is current with the latest standards and guidelines.
EDIT HISTORY	If changes were made, the date and the name of the user making the changes will be inserted automatically. You can optionally type in a description of the changes made during the editing session.
PATIENT DATA SOURCE	Specifies where to search for patient data. It is a string of comma-separated key words.
USE INACTIVE PROBLEMS	Applies only to searches in Problem List. Normally inactive problems are not used. However when this field is set to YES, then both active and inactive problems are used. This field works just like the field with the same name that can be specified for a reminder definition finding or a reminder term finding. If this field is defined in the taxonomy, it will take precedence over the value of the corresponding field at the term or definition level.
INACTIVE FLAG	Enter "1" to inactivate the taxonomy. This flag is set to ACTIVE in the distribution. As part of the installation, each site should review the taxonomy definitions and inactivate those that do not meet the site's needs. If desired, a site can copy a distributed taxonomy, using the taxonomy copy option, to a local version and edit it to meet the site's needs. If a taxonomy is inactive, it cannot be selected as a finding in a reminder definition.
ICD0 Range of Coded Values (multiple)	This multiple is used to define ranges of ICD0 coded values that constitute taxonomy entries. A range is defined by a low and high value that is inclusive. The low and high values are actual codes from the source file, not internal entry numbers.
ICD9 Range of Coded Values (multiple)	This multiple is used to define ranges of ICD9 coded values that constitute taxonomy entries. A range is defined by a low and high value that is inclusive. The low and high values are actual codes from the source file, not internal entry numbers.
CPT Range of Coded Values	This multiple is used to define ranges of CPT coded values that constitute taxonomy entries. A range is defined by a low and a high value that are inclusive. The low and high values are actual codes from the source file, not internal entry numbers.

Reminder Taxonomies, cont'd

PATIENT DATA SOURCE specifies where to search for patient data. It is a string of comma-separated key words. The keywords and their meanings are:

KEYWORD	MEANING
IN	Search in the inpatient data file PTF
INDXLS	Search in PTF for DXLS only
INPR	Search in PTF for principal diagnosis only
EN	Search encounter (PCE) data
ENPR	Search PCE data for primary diagnosis only
PL	Search for Problem List diagnosis only
RA	Search in Radiology for radiology CPT codes.

You may use any combination of these keywords. An example is EN,RA. This would cause the search to be made in V CPT and Radiology for CPT codes. If PATIENT DATA SOURCE is left blank, the search is made in all the possible sources.

List Taxonomy Definitions (TL)

Use this option to get a summary of all the taxonomies on your system. It shows the name of the taxonomy and the low and high codes for each of the possible code types.

```

Select Taxonomy Management Option: TL List Taxonomy Definitions
DEVICE: <Enter> ANYWHERE Right Margin: 80//<Enter>
REMINDER TAXONOMY LIST
      ICD9 RANGE      ICD0 RANGE      CPT RANGE
NAME  LOW    HIGH    LOW    HIGH    LOW    HIGH
-----
FTEST1
      100.9    100.9    99.52    99.52
PAIN TAXONOMY
      388.71    388.72                62350    62351
      719.40    719.49                90783    90784
      724.1     724.1
      789.00    789.09
      724.2     724.2
      926.11    926.11
      724.5     724.5
PROBTEST 1
      311.     311.                90724    90724
  
```

List Taxonomy Definitions, cont'd

PROBTEST 2				
495.2	495.2			
Pain - Lower Back				
388.71	388.72	62350	62351	
719.40	719.49	90783	90784	
724.1	724.1			
789.00	789.09			
724.2	724.2			
926.11	926.11			
724.5	724.5			
RADTAX				
		76091	76091	
		71030	71030	
SL ALCOHOL ABUSE				
291.0	291.9			
303.00	303.93			
305.00	305.03			
571.0	571.3			
760.71	760.71			
790.3	790.3			
980.0	980.0			
357.5	357.5			
425.5	425.5			
535.3	535.31			
V11.3	V11.3			

Inquire about Taxonomy Item (TI)

Use this option to get the details of a single taxonomy.

```
Select Taxonomy Management Option: TI Inquire about Taxonomy Item
Select Reminder Taxonomy: VA-PNEUMOCOCCAL VACCINE Pneumococcal vaccine codes
...OK? Yes// <Enter> (Yes)
DEVICE: <Enter> ANYWHERE Right Margin: 80// <Enter>
REMINDER TAXONOMY INQUIRY Apr 05, 2000 12:04:15 pm Page 1
-----
NUMBER: 25
VA-PNEUMOCOCCAL VACCINE
-----
Brief Description:
Pneumococcal vaccine codes
Class: NATIONAL
Sponsor:
Review Date:
Edit History:
Patient Data Source:
Use Inactive Problems:
ICD9 Codes:
Range V06.6-V06.6
Code ICD Diagnosis
----
V06.6 PROPY VACC STREP PNEU&FLU
ICD0 Codes:
Range 99.55-99.55
Code ICD Operation/Procedure
----
99.55 VACCINATION NEC
Range 99.59-99.59
Code ICD Operation/Procedure
----
99.59 VACCINATION/INNOCULA NEC
```

Inquire about Taxonomy Item, cont'd

CPT Codes:

Range G0009-G0009

Code	CPT Short Name
-----	-----
G0009	Admin pneumococcal vaccine

Range 90732-90732

Code	CPT Short Name
-----	-----
90732	PNEUMOCOCCAL VACCINE, ADULT

Select Reminder Taxonomy: <Enter>

Edit Taxonomy Item (TE)

Use this option to edit a single taxonomy definition.

```
Select Taxonomy Management Option: TE Edit Taxonomy Item

Select Reminder Taxonomy Item:  SLC DIABETES      SLC DIABETES CODES

General Taxonomy Data
NAME: SLC DIABETES// <Enter>
BRIEF DESCRIPTION: SLC DIABETES CODES// <Enter>

CLASS:   LOCAL
SOURCE:
REVIEW DATE:

PATIENT DATA SOURCE: ?
      Answer must be 1-40 characters in length.

This is a list of comma separated patient data sources.
You may use any combination of valid entries.
Valid entries are:
  IN - inpatient from PTF
  INDXLS - inpatient DXLS diagnosis only
  INPR - inpatient primary diagnosis only
  EN - encounter PCE data
  ENPR - encounter PCE data primary diagnosis only
  PL - Problem List
  RA - radiology CPT only

PATIENT DATA SOURCE: PL
USE INACTIVE PROBLEMS: <Enter>
INACTIVE FLAG: <Enter>

ICD0 Range of Coded Values
Select ICD0 LOW CODED VALUE: <Enter>

ICD9 Range of Coded Values
Select ICD9 LOW CODED VALUE: 391.8// <Enter>
  ICD9 LOW CODED VALUE: 391.8//<Enter>
  ICD9 HIGH CODED VALUE: 391.8// <Enter>
Select ICD9 LOW CODED VALUE: <Enter>

CPT Range of Coded Values
Select CPT LOW CODED VALUE: 10060// <Enter>
  CPT LOW CODED VALUE: 10060// <Enter>
  CPT HIGH CODED VALUE: 10060// <Enter>
Select CPT LOW CODED VALUE: <Enter>

Select Reminder Taxonomy Item: <Enter>
```

Copy Taxonomy Item (TC)

Use this option to copy an existing taxonomy definition into a new entry in the REMINDER TAXONOMY file (#811.2). Once the taxonomy has been copied, you have the option of editing it.

```
Select Taxonomy Management Option: TC Copy Taxonomy Item

Select the taxonomy item to copy: VA-ALCOHOL ABUSE      Alcohol abuse codes
PLEASE ENTER A UNIQUE NAME: SL ALCOHOL ABUSE

The original taxonomy VA-ALCOHOL ABUSE has been copied into SL ALCOHOL ABUSE.
Do you want to edit it now? YES

General Taxonomy Data
.
.
.
```

If you choose to edit the taxonomy you've copied, you will see the same prompts as in Edit Taxonomy Item, described on the previous page.

Reminder Terms

A reminder term provides a way to group findings under a single name, just as a taxonomy lets you group a set of codes under a single name. Each term has a findings multiple that is just like the findings multiple in the reminder definition. The list of possible findings in a term is the same as in a definition except that a term cannot have another term as a finding.

When a term is evaluated, the entire list of findings is evaluated and the most recent true finding is used for the value of the term. If none of the findings are true, then the term is false.

A term's Class can be:

National (N)

VISN (V)

Local (L)

These options will be useful in the future for national guidelines/reporting. The Reminder Term functionality will allow you to map local or VISN-level findings to national terms.

Reminder Term Management Options

Synonym	Option	Option Name	Description
TL	List Reminder Terms	PXRM TERM LIST	This option allows a user to display a list of reminder terms that have been defined.
TI	Inquire about Reminder Term	PXRM TERM INQUIRY	This option allows a user to display the contents of a reminder term in an easy-to-read format.
TE	Reminder Term Edit	PXRM TERM EDIT	This option is used to edit reminder terms. NOTE: Name the reminder terms using all capital letters because the names are case sensitive.
TC	Copy Reminder Term	PXRM TERM COPY	This option allows a user to copy an existing reminder term into a new one. The new term must have a unique name.

List Reminder Terms (TL)

This option is used to give a brief listing of reminder terms.

```
Select Reminder Term Management Option: TL List Reminder Terms
DEVICE: <Enter> ANYWHERE      Right Margin: 80// <Enter>
REMINDER TERM LIST                                MAY  8,2001  12:33    PAGE 1
-----
DECLINED HEP C RISK ASSESSMENT
  Class:      National
  Date Created: APR 24,2000
  Sponsor:    INFECTIOUS DISEASES PROGRAM OFFICE, VAHQ
  Review Date:
  Description: This term represents patient declined or refused to have
               the Hepatitis C Risk Assessment.  Add any health factors or
               other finding items that your local site uses to represent
               this term.
  Findings:   DECLINED HEP C RISK ASSESSMENT

HEP C VIRUS ANTIBODY NEGATIVE
  Class:      National
  Date Created: MAY  4,2000
  Sponsor:    INFECTIOUS DISEASES PROGRAM OFFICE, VAHQ
  Description: This term represents positive test results on laboratory
               tests for Hepatitis C virus antibody.  Add the local
               hepatitis C virus antibody laboratory tests as findings for
               this term.  Include the CONDITION field to check for the
               negative result value.
  Findings:

HEP C VIRUS ANTIBODY POSITIVE
  Class:      National
  Date Created: MAY 4,2000
  Sponsor:    INFECTIOUS DISEASES PROGRAM OFFICE, VAHQ
  Description: This term represents positive test results on laboratory
               tests for Hepatitis C virus antibody.  Add the local
               hepatitis C virus antibody laboratory tests as findings for
               this term.  Include the CONDITION field to check for the
               positive result value.
  Findings:

HEPATITIS C INFECTION
  Class:      National
  Date Created: MAY 4,2000
  Sponsor:    INFECTIOUS DISEASES PROGRAM OFFICE, VAHQ
  Description: This term represents patient diagnosed with Hepatitis C
               infection.
  Findings:   VA-HEPATITIS C INFECTION
```

List Reminder Terms, cont'd

NO RISK FACTORS FOR HEP C

Class: National
Date Created: APR 24,2000
Sponsor: INFECTIOUS DISEASES PROGRAM OFFICE, VAHQ
Description: This term represents patient findings that indicate the patient has no risk factors related to Hepatitis C. Add any health factors or other finding items that your local site uses to represent this term.
Findings: NO RISK FACTORS FOR HEP C

PREVIOUSLY ASSESSED HEP C RISK

Class: National
Date Created: APR 24,2000
Sponsor: INFECTIOUS DISEASES PROGRAM OFFICE, VAHQ
Description: This term is available for patients who have previously had an assessment completed at an institution outside the VA system, at another VA site, or from historic records on site that may be unavailable in the current Vista/CPRS system (i.e. archived electronic information, or information contained within a paper chart not in the computer system).

This term is primarily used to resolve the National Hepatitis C Risk Assessment Clinical Reminder. However, if the patient has had a previous positive test, previous positive diagnosis for hepatitis C disease that has been verified, but that the computer algorithm did not capture, use one of this terms findings (health factor, education topic,...) to resolve the Clinical Reminder. Further, you will be given the opportunity to place a Free text comment on where and when this previous assessment occurred and what criteria (i.e. lab test, diagnosis) were used. For example, if you choose this option, you could then type into the free text section ("Previous positive Hepatitis C antibody test at St. X hospital in Local City, State on March 2000").

Findings: PREV POSITIVE TEST FOR HEP C

RISK FACTOR FOR HEPATITIS C

Class: National
Date Created: APR 24,2000
Sponsor: INFECTIOUS DISEASES PROGRAM OFFICE, VAHQ
Description: This term represents findings that indicate the patient has risk factors for Hepatitis C. Add any health factors or other finding items that your local site uses to represent this term.
Findings: RISK FACTOR FOR HEPATITIS C

Inquire about Reminder Term (TI)

This option lets you display the contents of a reminder term in an easy-to-read format.

```
Select Reminder Term Management Option: TI Inquire about Reminder Term
Select Reminder Term: HBs Ab positive NATIONAL
...OK? Yes// <Enter> (Yes)

DEVICE: <Enter> ANYWHERE Right Margin: 80// <Enter>
```

```
REMINDER TERM INQUIRY Jun 22, 2001 8:56:32 am Page 1
```

```
-----
HBs Ab positive No.24
-----
```

```
Class: NATIONAL
Sponsor: INFECTIOUS DISEASES PROGRAM OFFICE, VAHQ
Date Created: MAY 31,2000
Review Date:
```

Description:

This term represents reminder tests for Hepatitis B surface antibody positive.

Enter findings from the laboratory test file that are used locally to represent this term. Use the condition field to clearly identify the positive results. e.g., I (V["positive"]!(V="+"))

In order for the VHA to do surveillance for Hepatitis B, the Infectious Disease Program Office is looking for laboratory evidence of infection with hepatitis B. This laboratory evidence of infection includes the standard serological marker of the presence of Hepatitis B surface antibody.

Edit History:

```
Edit Date: SEP 1,2000 Edit By:
Edit Comments:
```

Findings:

```
Select Reminder Term:
```

Reminder Term Edit (TE)

You can edit terms or add new ones with this option. If the term is National, you can enter new Findings Items, but can't edit other fields. You can edit any fields for VISN or Local terms.

Reminder Term Edit Example

Mapping the local term, HEP B SURFACE Ag, to the National term, HBs

```
Select Reminder Term Management Option: TE Reminder Term Edit
Select Reminder Term: HBs
    ...OK? Yes// <Enter> (Yes)

Select FINDING ITEM: HEP B SURFACE Ag ←
    FINDING ITEM: HEP B SURFACE Ag// <Enter>
    EFFECTIVE PERIOD: <Enter>
    USE INACTIVE PROBLEMS: YES
    WITHIN CATEGORY RANK: <Enter>
    CONDITION: I (V["POS"]!(V="+"))
    MH SCALE: <Enter>
Select FINDING ITEM: <Enter>
Select Reminder Term: <Enter>
```

This is the local finding that is mapped to the national term, HBs

Copy Reminder Term (TC)

This option lets you copy an existing reminder term into a new one. The new term must have a unique name.

```
Select Reminder Term Management Option: TC Copy Reminder Term
Select the reminder term to copy: EDUTERM
  Reminder term to copy: EDUTERM
    ...OK? Yes// <Enter> (Yes)
PLEASE ENTER A UNIQUE NAME: SLC EDUTERM
The original reminder term EDUTERM has been copied into SLC EDUTERM.
Do you want to edit it now? YES
NAME: SLC EDUTERM// <Enter>
.
.
.
```

If you choose to edit the copied term, the sequence of prompts is the same as those shown under Reminder Term Edit, shown on the previous pages.

Exported Reminder Terms

ALANINE AMINO (ALT) (SGPT)	NATIONAL
BILIRUBIN	NATIONAL
DECLINED HEP C RISK ASSESSMENT	NATIONAL
HAV Ab positive	NATIONAL
HAV IgG positive	NATIONAL
HAV IgM Ab positive	NATIONAL
HBc Ab IgM positive	NATIONAL
HBe Ag positive	NATIONAL
HBs Ab positive	NATIONAL
HBs Ag positive	NATIONAL
HEP C VIRUS ANTIBODY NEGATIVE	NATIONAL
HEP C VIRUS ANTIBODY POSITIVE	NATIONAL
HEPATITIS C INFECTION	NATIONAL
INTERFERON ALFA-2A	NATIONAL
INTERFERON ALFA-2B	NATIONAL
INTERFERON ALFA-2B/RIBAVIRIN	NATIONAL
INTERFERON ALFA-3N	NATIONAL
INTERFERON ALFACON-1	NATIONAL
INTERFERON BETA-1A	NATIONAL
INTERFERON BETA-1B	NATIONAL
NO RISK FACTORS FOR HEP C	NATIONAL
PREVIOUSLY ASSESSED HEP C RISK	NATIONAL
RIBAVIRIN	NATIONAL
RISK FACTOR FOR HEPATITIS C	NATIONAL
TRANSFERASE (AST) (SGOT)	NATIONAL

Computed Findings

When none of the standard finding types will work, sites can create a computed finding.

A computed finding is an M routine that takes a standard set of arguments. The computed finding must be entered into the REMINDER COMPUTED FINDING file #811.4 before it can be used as a finding in a reminder definition.

NOTE: Only programmers who have "@" access can actually write the routine and enter it into the REMINDER COMPUTED FINDINGS file. Once it is in the file, Reminders Managers can use the computed finding in reminder definitions.

A number of computed findings are distributed by the Clinical Reminders package. All of them were written to be used with the CONDITION field. This will allow you to create findings that are very specific. For example, using the BMI computed finding you can create a finding this is true only for patients with a BMI that is greater than or equal to 25. You can use these as examples as you start to create your own computed findings.

Steps to Create a Computed finding

1. Write an M routine.

The routine takes the following arguments: (DFN, TEST, DATE, VALUE, TEXT). DFN is the patient id and will be set when the computed finding routine is called. The following variables should be set by the computed finding routine.

- TEST is the logical value of the FINDING. Set to 1 for true and 0 for false.
- DATE is the date of the finding in FileMan format. Set it to null if the finding is false.
- VALUE is a value for the finding to be used by the CONDITION field. Setting this is optional.
- TEXT is text to be displayed in the Clinical Maintenance output. Setting this is optional.

Whenever you create a computed finding, make sure that you “new” all the variables you use, to avoid strange side effects.

Computed Findings, cont'd

2. Enter your computed finding into the Reminders package.

Use the option Reminder Computed Finding Edit (CFE) on the Computed Findings menu to enter/register your computed finding, which makes an entry in the REMINDER COMPUTED FINDINGS file (#811.4).

File #811.4 contains a combination of nationally distributed and local entries. Nationally distributed entry names are prefixed with VA-. Local entry names can't start with VA-.

Complete each of these four fields:

NAME (.01 field) - this is the name of the computed finding. When a computed finding is added as a finding to a reminder definition, it is done using NAME. For example, type CF.VA-BMI to add the exported VA-BMI computed finding to your reminder definition.

ROUTINE (.02 field) - this is the name of the MUMPS routine.

ENTRY POINT (.03 field) - this is the entry point in the MUMPS routine (the line tag at which that finding begins).

PRINT NAME (.04 field) - this will be displayed on the Clinical Maintenance component as the name of the computed finding. If it is blank, NAME will be used.

Example

```
Select Reminder Computed Finding Management Option: cfe Reminder Computed
Finding Edit

Select Reminder Computed Finding: AJEY TEST COMPUTED FINDING
...OK? Yes// <Enter> (Yes)

NAME: AJEY TEST COMPUTED FINDING Replace <Enter>
ROUTINE: AJEYRM01
ENTRY POINT: TEST
PRINT NAME: Test Computed Finding
DESCRIPTION:
  1>
CLASS: LOCAL//
SPONSOR:
REVIEW DATE:
```

3. Placing the finding into your reminder

Now that the finding is created and entered/registered, you may use it just like any other finding would be used. The prefix for adding it to the list of findings is CF. and you can choose whether it belongs to the patient cohort logic or the resolution logic. Simply keep in mind what it means to have your finding TRUE or FALSE. Here is an example of using the GMRA finding to identify patients that have no allergy assessment data on their electronic chart. This method uses the scenario that it is DUE for all patients (no specific cohort logic), and RESOLVED by a TRUE computed finding (patient *has* data in ART package).

The (short) version of setting it up is captured here.

```
Select FINDING: CF.AJEY ALLERGY ASSESSMENT
Searching for a REMINDER COMPUTED FINDING, (pointed-to by FINDING ITEM)
  AJEY ALLERGY ASSESSMENT
  ...OK? Yes// (Yes)
FINDING ITEM: AJEY ALLERGY ASSESSMENT//
USE IN RESOLUTION LOGIC: AND//
USE IN PATIENT COHORT LOGIC:
FOUND TEXT:
There is allergy assessment data on file in the ART package of VistA for
this patient.
NOT FOUND TEXT:
There is no allergy assessment on file in the ART package of VistA for
this patient.
```

Example: Test for whether patient is an inpatient

- If you want it to be true, set TEST to 1.
- Set the DATE="" when TEST=0 and set DATE to the date of the finding when TEST=1
- Set VALUE to a value that can be tested against in the CONDITION field.
- TEXT just goes back as additional info in the Clinical Maintenance view.

So, if you made one that was testing for whether or not your patient was an inpatient, it might look like this:

```
INP (DFN,TEST,DATE,VALUE,TEXT) ;
  N VAIN
  D INP^VADPT
  I +$P(VAIN(7),"^") S TEST=1,DATE=$P(VAIN(7),"^")
  E S TEST=0,DATE=""
  D KVA^VADPT
  Q
```

See the [Hines Computed Findings website](#) for further information about computed findings. Also look in SHOP,ALL and on the [Clinical Reminders website](#) for examples.

Reminder Computed Findings Menu

The options on this menu provide tools for managing computed findings used in clinical reminders.

Synonym	Option	Option Name	Description
CFL	Reminder Computed Finding List	PXRM COMPUTED FINDING LIST	This option lists the computed findings that are defined at a site.
CFE	Reminder Computed Finding Edit	PXRM COMPUTED FINDING EDIT	This option provides for editing of computed finding entries in the REMINDER COMPUTED FINDINGS file. To use this option, you must have programmer access.

Reminder Computed Finding List (CFL)

```

Select Reminder Computed Finding Management Option: CFL Reminder Computed Finding
List
DEVICE: <Enter> ANYWHERE      Right Margin: 80// <Enter>
      Computed Finding List                JUN 19,2001  14:42    PAGE 1
-----
Name: Calculate BMI>27                Print Name: Calculate BMI>27
Entry Point: OBESE                    Routine: PXRMOBES
Class: LOCAL                          Sponsor:
Review Date:
Name: FIRST CF ENTRY TEST            Print Name: FIRST CF ENTRY
Entry Point: TAG                      Routine: ROUTINE
Class: LOCAL                          Sponsor:
Review Date: JUN 19,2001

Name: NCG MST                        Print Name: MST
Entry Point: MST                      Routine: AFRREM
Class: LOCAL                          Sponsor:
Review Date:

Name: SECOND CF DESCRIPTION          Print Name: SECOND CF DESCRIPTION
Entry Point: TAG                      Routine: ROUTINE1
Class: LOCAL                          Sponsor:
Review Date:

```

Computed Findings, cont'd

Name: VA-BMI	Print Name: BMI
Entry Point: BMI	Routine: PXRMBMI
Class: NATIONAL	Sponsor:
Review Date:	
Name: VA-DATE OF BIRTH	Print Name: Date of Birth
Entry Point: DOB	Routine: PXRMPDEM
Class: NATIONAL	Sponsor:
Review Date:	
Name: VA-DATE OF DEATH	Print Name: Date of Death
Entry Point: DOD	Routine: PXRMPDEM
Class: NATIONAL	Sponsor:
Review Date:	
Name: VA-PRIMARY CARE PROVIDER	Print Name: PCMM Primary Care Provider
Entry Point: PROVIDER	Routine: PXRMPDPCIN
Class: NATIONAL	Sponsor:
Review Date:	
Name: VA-PRIMARY CARE TEAM	Print Name: PCMM Primary Care Team
Entry Point: TEAM	Routine: PXRMPDPCIN
Class: NATIONAL	Sponsor:
Review Date:	
Name: VA-RACE	Print Name: Race
Entry Point: RACE	Routine: PXRMPDEM
Class: NATIONAL	Sponsor:
Review Date:	
Press RETURN to continue...	
CFL	Reminder Computed Finding List
CFE	Reminder Computed Finding Edit
Select Reminder Computed Finding Management Option:	

Reminder Computed Finding Edit (CFE)

This option lets you enter or edit computed findings in your system. In this example, a sponsor and review date are added to an existing computed finding.

```
Select Reminder Computed Finding Management Option: CFE Reminder Computed Finding
Edit

Select Reminder Computed Finding: Calculate BMI>27 LOCAL
    ...OK? Yes// <Enter> (Yes)

NAME: Calculate BMI>27// <Enter>
ROUTINE: PXRMOBES// <Enter>
ENTRY POINT: OBESE// <Enter>
PRINT NAME: Calculate BMI>27// <Enter>
DESCRIPTION:
    1>
CLASS: LOCAL// <Enter>
SPONSOR: Guidelines Committee
REVIEW DATE: T+90

Select Reminder Computed Finding:<Enter>
```

Reminder Sponsor Management

Your site can designate a group or organization as a sponsor of reminders and reminder components that you use in your VISN or site. This allows clinicians and coordinators to be aware of the derivation and basis for any reminder definition being used at your site.

The Reminder Sponsor Management menu contains three options to let you add, edit, or display reminder sponsors.

Abbr	Option	Option Name	Description
SE	Edit Reminder Sponsor	PXRM SPONSOR EDIT	The option allows for editing of Reminder Sponsors.
SL	List Reminder Sponsors	PXRM SPONSOR LIST	This option is used to get a list of Reminder Sponsors.
SI	Reminder Sponsor Inquiry	PXRM SPONSOR INQUIRY	This option is used to do a reminder sponsor inquiry.

List Reminder Sponsors (LS)

This option is used to get a list of the Reminder Sponsors at your site.

```
Select Reminder Sponsor Management Option: SL List Reminder Sponsors
DEVICE: ANYWHERE Right Margin: 80//
REMINDER SPONSOR LIST JUN 8,2001 10:41 PAGE 1
NAME CLASS
-----
A NEW SPONSOR VISN
Performance Measures Committee VISN
Guidelines committee LOCAL
INFECTIOUS DISEASES PROGRAM OFFICE, VAHQ NATIONAL
NEW REMIND LOCAL
PJH NATIONAL
SLC OIFO DEVELOPMENT NATIONAL
```

Reminder Sponsor Inquiry

```
Select Reminder Sponsor Management Option: SI Reminder Sponsor Inquiry
Select Reminder Sponsor: Women Veterans Health Program          NATIONAL
DEVICE: ANYWHERE      Right Margin: 80//
REMINDER SPONSOR INQUIRY                                     Aug 31, 2001 11:37:43 am Page 1
-----
```

NUMBER: 12

```
Name: Women Veterans Health Program
Class: NATIONAL
Contact Information:
Associated Sponsors:

Select Reminder Sponsor:
```

Edit Reminder Sponsor

This option lets you edit existing reminder sponsors for your site or VISN or to enter new reminder sponsors. This is the name of a group or organization that sponsors reminder components.

NOTE: Once a Sponsor is in use, it cannot be edited.

Example

```
Select Reminder Sponsor Management Option: se Edit Reminder Sponsor

Select Reminder Sponsor: HOSPITAL COMMITTEE
  Are you adding 'HOSPITAL COMMITTEE' as
    a new REMINDER SPONSOR (the 9TH)? No// Y (Yes)
  REMINDER SPONSOR CLASS: L LOCAL
Checking usage ...
NAME: HOSPITAL COMMITTEE// <Enter>
CLASS: LOCAL// <Enter> _____
Select Reminder Sponsor: <Enter>
```

The Class of the Sponsor must match the Class of the entry that points to the Sponsor.

Chapter 2: Testing Reminder Definitions

Reminder Test Option

Before a new or modified reminder is put into production, it should be thoroughly tested. The Reminder Test option provides a convenient tool that can be used as an aid in setting up new reminders and tracking down problems with existing ones. It lets you run a reminder without going through CPRS or Health Summary.

The output from this option provides a view of the internal workings of the clinical reminders software and allows you to see what happened as the reminder was evaluated. Errors and warnings that are not always seen on the Health Summary are displayed here. When setting up a reminder, it's a good idea to have test patients with known clinical data such as examinations, immunizations, ICDs, CPTs, etc., that are pertinent to the reminder being developed. Using this option to run the reminder for test patients allows you to see if the reminder operates as expected.

You should have patients who are in the cohort and who are not in the cohort. For patients who are in the cohort, you should have some who have the reminder resolved and some who do not.

It is very useful to have the output from the Reminder Inquiry option available when using the test option. Here is the inquiry for the VA-DIABETIC EYE EXAM.

```
REMINDER DEFINITION INQUIRY                               Feb 22, 2001 11:18:56 am Page 1
-----
VA-DIABETIC EYE EXAM                                     No. 17
-----
Print Name:                                             Diabetic Eye Exam
Class:                                                 NATIONAL
Sponsor:
Review Date:
Usage:                                                 CPRS
Related VA-* Reminder:
Reminder Dialog:
Priority:
Reminder Description:
    Patients with the VA-DIABETES taxonomy should have a diabetic eye exam
    done yearly.
```

Testing Reminder Definitions, cont'd

Technical Description:

This reminder is based on the Diabetic Eye Exam reminder from the New York VAMC which was designed to meet the guidelines defined by the PACT panel. Additional input came from the Saginaw VAMC.

Baseline Frequency:

Do In Advance Time Frame: Do if DUE within 1 month
Sex Specific:
Ignore on N/A:
Frequency for Age Range: 0Y - Not Indicated for all ages
Match Text:
No Match Text:

Findings:

Finding Item: DIABETIC EYE EXAM (FI(1)=EX(3))
Finding Type: EXAM
Use in Resolution Logic: OR

Finding Item: VA-DIABETES (FI(2)=TX(28))
Finding Type: REMINDER TAXONOMY
Match Frequency/Age: 1 year for all ages
Found Text: Diabetic eye exam required annually for all
diabetic patients. with HTN.
Not Found Text: No history of diabetes on file.

Use in Patient Cohort Logic: AND

General Patient Cohort Found Text:

General Patient Cohort Not Found Text:

General Resolution Found Text:

General Resolution Not Found Text:

Default PATIENT COHORT LOGIC to see if the Reminder applies to a patient:
(SEX)&(AGE)&FI(2)

Expanded Patient Cohort Logic:
(SEX)&(AGE)&FI(VA-DIABETES)

Default RESOLUTION LOGIC defines findings that resolve the Reminder:
FI(1)

Expanded Resolution Logic:
FI(DIABETIC EYE EXAM)

Web Sites:

Testing Reminder Definitions, cont'd

Test option output for this reminder

```
Select Reminder Managers Menu Option: RT Reminder Test
Select Patient: BABBITT,THEODORE          5-19-46      448668832      YES      SC V
ETERAN
Enrollment Priority:                      Category: IN PROCESS      End Date:

Select Reminder: VA-DIABETIC EYE EXAM
The elements of the FIEV array are:
FIEV(1)=1
FIEV(1,"DATE")=3010110E
FIEV(1,"FINDING")=3;AUTTEXAM(
FIEV(1,"RESULT")=
FIEV(1,"SOURCE")=129;AUPNVXAM(
FIEV(1,"VALUE")=
FIEV(1,"VIEN")=4647
FIEV(2)=1
FIEV(2,"CODEP")=851
FIEV(2,"DATE")=3000317.08
FIEV(2,"FINDING")=28;PXD(811.2,
FIEV(2,"SOURCE")=2082;AUPNVPOV
FIEV(2,"VIEN")=3787
FIEV("DFN")=54
FIEV("PATIENT AGE")=48

The elements of the ^TMP(PXR MID,$J) array are:
^TMP(PXR MID,$J,17,"EXAM DIABETIC EYE EXAM")=01/10/2001 (E) Exam: DIABETIC EYE EX
AM
^TMP(PXR MID,$J,17,"FINDING 2_FOUNDB")=Diabetic eye exam required annually for al
l diabetic patients. with
^TMP(PXR MID,$J,17,"FINDING 2_FOUNDC")=HTN.
^TMP(PXR MID,$J,17,"ICD9VPOV 250.01","CODE")=250.01
^TMP(PXR MID,$J,17,"ICD9VPOV 250.01","DATE")=3000317.08
^TMP(PXR MID,$J,17,"ICD9VPOV 250.01","DIAG")=DIABETES MELLI W/O COMP TYP I
^TMP(PXR MID,$J,17,"ICD9VPOV 250.01","PN")=DIABETES MELLITUS WITHOUT MENTION OF C
OMPLICATION; TYPE 1 (IDDM) (JUVENILE TYPE), NOT STATED AS UNCONTROLLED
^TMP(PXR MID,$J,17,"PATIENT COHORT LOGIC")=1^(SEX)&(AGE)&FI(2)^(1)&(1)&1
^TMP(PXR MID,$J,17,"REMINDER NAME")=Diabetic Eye Exam
^TMP(PXR MID,$J,17,"RESOLUTION LOGIC")=1^(0)!FI(1)^(0)!1
^TMP(PXR MID,$J,17,"zFREQARNG")=Due every 1 year for all ages

The elements of the ^TMP("PXRHM",$J) array are:
^TMP("PXRHM",$J,17,"Diabetic Eye Exam")=RESOLVED^3020110^3010110
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",1)=
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",2)=Applicable: Due every 1 year for
all ages within cohort.
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",3)=03/17/2000 Encounter Diagnosis:
250.01 DIABETES MELLI W/O COMP TYP I
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",4)= Prov. Narr. - DIABETES MELLITU
S WITHOUT MENTION OF COMPLICATION;
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",5)=TYPE 1 (IDDM) (JUVENILE TYPE), N
OT STATED AS UNCONTROLLED
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",6)=Diabetic eye exam required
```

Testing Reminder Definitions, cont'd

```
annually for all diabetic patients. with
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",7)=HTN.
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",8)=
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",9)=Resolution: Last done 01/10/2001
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",10)=01/10/2001 (E) Exam: DIABETIC EYE
EXAM
```

There are three sections in this output. We will go through them individually.

The first section is the FIEV array, which corresponds to the findings in the reminder definition. If we look back at our definition inquiry, we see there are two findings in this reminder.

1. the exam DIABETIC EYE EXAM
2. the taxonomy VA-DIABETES.

The entries in FIEV(1) show us what was found for the eye exam:

The elements of the FIEV array are:	
FIEV(1)=1	The 1 tells us the finding is true. A 0 would mean it is false.
FIEV(1,"DATE")=3010110E	The date of the finding in FileMan format. The E means it's historical.
FIEV(1,"FINDING")=3;AUTTEXAM(FIEV(1,"RESULT")=	The finding is entry 3 in the Exam File.
FIEV(1,"SOURCE")=129;AUPNVXAM(FIEV(1,"VALUE")=	The patient data came from the V Exam file and is entry 129.
FIEV(1,"VIEN")=4647	The entry in the Visit File is 4647.

The entries in FIEV(2) show us what was found for the taxonomy:

<pre>FIEV(2)=1</pre>	<pre>FIEV(2,"CODEP")=851</pre>	<pre>FIEV(2,"DATE")=3000317.08</pre>	<pre>FIEV(2,"FINDING")=28;PXD(811.2,</pre>	<pre>FIEV(2,"SOURCE")=2082;AUPNVPOV</pre>	<pre>FIEV(2,"VIEN")=3787</pre>	<pre>FIEV("DFN")=54</pre>	<pre>FIEV("PATIENT AGE")=48</pre>
							<p>The ICD9 code is entry 851 in the ICD9 File.</p>
							<p>The taxonomy is entry 28.</p>
							<p>The patient data is entry 2082 in the V POV file.</p>
							<p>The patient's DFN is 54.</p>
							<p>The patient's age is 48.</p>

The next section gives us additional information:

The elements of the ^TMP(PXR MID,\$J) array are:

^TMP(PXR MID,\$J,17,"EXAM DIABETIC EYE EXAM")=01/10/2001 (E) Exam: DIABETIC EYE EX

AM

^TMP(PXR MID,\$J,17,"FINDING 2_FOUNDB")=Diabetic eye exam required annually for all diabetic patients. with

^TMP(PXR MID,\$J,17,"FINDING 2_FOUNDC")=HTN.

^TMP(PXR MID,\$J,17,"ICD9VPOV 250.01","CODE")=250.01

^TMP(PXR MID,\$J,17,"ICD9VPOV 250.01","DATE")=3000317.08

^TMP(PXR MID,\$J,17,"ICD9VPOV 250.01","DIAG")=DIABETES MELLI W/O COMP TYP I

^TMP(PXR MID,\$J,17,"ICD9VPOV 250.01","PN")=DIABETES MELLITUS WITHOUT MENTION OF C
OMPLICATION; TYPE 1 (IDDM) (JUVENILE TYPE), NOT STATED AS UNCONTROLLED

^TMP(PXR MID,\$J,17,"PATIENT COHORT LOGIC")=1^(SEX)&(AGE)&FI(2)^(1)&(1)&1

,17,"REMINDER NAME")=Diabetic Eye Exam

^TMP(PXR MID,\$J,17,"RESOLUTION LOGIC")=1^(0)!FI(1)^(0)!1

^TMP(PXR MID,\$J,17,"zFREQARNG")=Due every 1 year for all ages

The date of the exam in a standard format.

Age range found text.

The ICD9 code 250.01 was found in the V POV File.

The diagnosis and provider narrative.

The patient cohort logic evaluated to true.

This is what each of the logic elements evaluated to. 1 is true and 0 is false,

Resolution Logic in the same format as the Patient Cohort Logic.

Final frequency and age range.

The actual Patient Cohort Logic. It matches what you see in the inquiry.

The final section shows the Clinical Maintenance information that is returned to the calling application, for example Health Summary or CPRS:

The elements of the ^TMP("PXRHM",\$J) array are:

```
^TMP("PXRHM",$J,17,"Diabetic Eye Exam")=RESOLVED^3020110^3010110
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",1)=
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",2)=Applicable: Due every 1 year for
all ages within cohort.
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",3)=03/17/2000 Encounter Diagnosis:
250.01 DIABETES MELLI W/O COMP TYP I
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",4)= Prov. Narr. - DIABETES MELLITU
S WITHOUT MENTION OF COMPLICATION;
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",5)=TYPE 1 (IDDM) (JUVENILE TYPE), N
OT STATED AS UNCONTROLLED
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",6)=Diabetic eye exam required annua
lly for all diabetic patients. with
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",7)=HTN.
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",8)=
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",9)=Resolution: Last done 01/10/2001
^TMP("PXRHM",$J,17,"Diabetic Eye Exam","TXT",10)=01/10/2001 (E) Exam: DIABETIC EYE
EXAM
```

This is the status, the due date, and the last done date. The rest of the lines are in their final format.

Testing in Health Summary

The following are steps for testing reminders in Health Summary:

1. Activate Clinical Reminders components in the Health Summary Component file. Create a Health Summary Type for testing new reminders being defined.
2. Add the Maintenance and Reminder components to the reminder Health Summary Type.
3. Select the reminder definition(s) to be tested in the selection items prompt from Clinical Maintenance and Clinical Reminder components.
4. If you can't select the clinical reminder components for the Health Summary, the components must be enabled for use, and the "Rebuild Ad Hoc Health Summary Type" option must be run.
5. Use the Print Health Summary Menu, "Patient Health Summary" option to begin testing the component for individual patients.
6. Find patients with data in **VISTA** that should match the reminder definitions, as well as some that won't have data matches.
7. Assess the reminder results: Are the age range and frequency evaluation working? Are the target findings found, taxonomy findings found, and health factors found presenting the actual data found for patients that you know may have some results? When there is no data found, are the no-match comments being displayed (if defined)? Are pertinent negative alterations of the age and frequency criteria working as expected based on taxonomy or health factor findings?
8. Use the Print Health Summary Menu, "Hospital Location Health Summary" option to print the reminders for a clinic, based on a recently passed date range, or next week's date range. Did the Health Summary print run to completion without any errors?

Reminder Evaluation in CPRS

Clinical Reminders Managers or clinicians can use the Reminder evaluation utility that's available in the CPRS GUI to test reminders and dialogs as they are created.

HINT: Keeping one or more terminal emulator (e.g., KEA) screens open with the List Manager Reminder Management menu, along with an open CPRS window, is an effective way to work as you are creating working reminders and dialogs, to ensure that your definitions are appropriate. You can use both the Evaluate Reminder and Refresh options on the Action (or right-click) menu to see the effects of your changes.

There are two forms of the Reminder Evaluation option, for use before and after processing reminders.

1. Evaluate Reminder

Before you process a reminder, you can select this option to see if specific reminders in the Other Category folder should be Applicable or should be Due for the selected patient.

For example, in a diabetic clinic, you might see a patient around flu season and evaluate the flu shot reminder in the other category to see if a flu shot is needed.

To evaluate reminders, right-click in a tree view (from the Reminders Button or Drawer) and select Evaluate Reminder

2. Evaluate Processed Reminders

After you have processed a reminder, you can use this option to see if your actions during the encounter satisfied the reminder.

Satisfying a reminder may require more than you originally think. You may want to evaluate the reminders after you have processed them to make sure you have satisfied the reminder.

NOTE: PCE data may take a few minutes to be correctly recorded. Please wait a few minutes after processing a reminder before evaluating it again to ensure that it was satisfied.

To evaluate processed reminders, choose Action in the Available Reminders window, and then click on Evaluate Processed Reminders.

Chapter 3: Activating Clinical Reminders in CPRS

Once you are certain the reminder works as intended, activate the reminder and set it up in one or more of the following applications:

- Add it to a health summary
 - Add it to an encounter form
 - Activate CPRS parameters:
 1. Add it to the CPRS GUI Cover Sheet Reminder List
- OR Activate the New Reminders Parameters
2. Add it to CPRS Lookup Categories
 3. Activate the GUI Resolution parameter
 4. Activate the Mental Health dialog resolution parameter
 5. Set Default Outside Location
 6. Set Position Reminder Text at Cursor

NOTE:

Activate/Inactivate Reminders (RA)

Use this option to make individual reminders active or inactive in CPRS, Health Summary, and Encounter Forms.

```
Select Reminder Management Option: RA Activate/Inactivate Reminders
Select REMINDER DEFINITION NAME: ??
Answer with REMINDER DEFINITION NAME, or REMINDER TYPE, or
PRINT NAME
Choose from:
CHOLESTEROL SCREEN (F)
LOCAL FOBT
VA-*BREAST CANCER SCREEN
VA-*CERVICAL CANCER SCREEN
VA-*CHOLESTEROL SCREEN (F)
VA-*CHOLESTEROL SCREEN (M)
VA-*COLORECTAL CANCER SCREEN (
VA-*COLORECTAL CANCER SCREEN (
VA-*FITNESS AND EXERCISE SCREE
VA-*HYPERTENSION SCREEN
VA-*INFLUENZA IMMUNIZATION
VA-*PNEUMOCOCCAL VACCINE
VA-*PROBLEM DRINKING SCREEN
Select REMINDER DEFINITION NAME: CHOLESTEROL SCREEN (F)
INACTIVE FLAG: ?
Enter "1" to inactivate the reminder item.
Choose from:
1 INACTIVE
INACTIVE FLAG: 1
```

CPRS Reminder Configuration Menu [PXRМ CPRS CONFIGURATION]

The options to maintain reminder categories and to implement reminders within CPRS are on this menu.

Synonym	Option	Option Name	Description
CA	Add/Edit Reminder Categories	PXRМ CATEGORY EDIT/INQUIRE	A reminder category may contain a list of reminders and/or other sub-categories. Use this option to edit the list.
CL	CPRS Lookup Categories	PXRМ CPRS LOOKUP CATEGORIES	Reminder Categories to be displayed in the Other Categories folder of the note tab are entered here.
CS	CPRS Cover Sheet Reminder List	PXRМ CPRS COVER SHEET LIST	Use this option to enter reminders that will be displayed on the CPRS cover sheet if the New Reminders Parameter is NOT set to Yes.
PN	Progress Note Headers	PXRМ PN HEADER	The header inserted into the progress note when processing a reminder may be modified for user, location, or service. The default header is Clinical Reminders Activity.
MH	Mental Health Dialogs Active	PXRМ MENTAL HEALTH ACTIVE	This option allows a user to modify the "Mental Health Dialogs Active" CPRS parameter. You can activate Mental Health reminder resolution processing at a user, service, division, or system level. When activated for one of these levels, mental health tests can be performed in a reminder dialog.
RA	Reminder GUI Resolution Active	PXRМ GUI REMINDERS ACTIVE	This option allows a user to modify the "Reminders Active" CPRS parameter. You can activate GUI reminder resolution processing at a user, service, division, or system level. When activated for one of these levels, a reminders drawer is available on the notes tab for selecting and processing reminders.
DL	Default Outside Location	PXRМ DEFAULT LOCATION	Allows the default outside location for reminder dialogs to be specified at user, service, division or system level.
PT	Position Reminder Text at Cursor	PXRМ TEXT AT CURSOR	Allows the position reminder note text at cursor feature to be enabled at user, service, division or system level.
NP	New Reminder Parameters	PXRМ NEW REMINDER PARAMETERS	This option allows a user to modify the ORQQPX NEW REMINDER PARAMS parameter, which controls which parameters are used to store cover sheet reminders. If the New Reminders Parameter is set to Yes, you don't need to use PXRМ CPRS COVER SHEET LIST above.

Add/Edit Reminder Categories (CA)

Reminder categories are maintained with this option. A category defines a group of reminders and may include other sub-categories. To activate categories so that they appear in the reminders window in CPRS (under Other Categories), use the option CPRS Lookup Categories.

The first screen in this option displays the existing reminder categories:

<u>Selection List</u>		Aug 18, 1999 15:04:41	Page: 1 of 1
Reminder Categories			
<u>Item Reminder Category</u>			
1	DIABETES CLINIC REMINDERS		
2	WEIGHT AND NUTRITION		
+ + Next Screen - Prev Screen ?? More Actions >>>			
AD	Add	PT	List/Print All
QU	Quit		
Select Item: Quit//			

Actions

- AD** Add a new reminder category.
- PT** List or print all reminder categories
- QU** Return to menu
- #** Enter the item number to be edited.

Add/Edit Reminder Categories cont'd

If you select a reminder category, a description and related reminders are displayed. You can then edit the category

Edit List	Apr 18, 2000 15:04:41	Page: 1 of 1
Reminder Category Name: SLC DEMO CATEGORY		
Category Description: This is the text for that summarizes what this category represents. A category may contain reminders and/or a number of sub-categories.		
Sequence: 1	Reminder: SLC CANCER SCREEN	
Sequence: 2	Reminder: SLC DIABETIC EYE EXAM	
Sequence: 3	Reminder: SLC LIFE STYLE EDUCATION	
Sequence: 4	Reminder: SLC PNEUMOCOCCAL VACCINE	
Sequence: 90	Reminder: SLC DIABETIC FOOT CARE ED	
Sequence: 99	Reminder: MHTEST	
Sub-category: SUBSTANCE ABUSE		Sequence: 3
Sequence: 1	Reminder: TOBACCO EDUCATION	
Sequence: 2	Reminder: TOBACCO USE SCREEN	
Sequence: 3	Reminder: VA-*PROBLEM DRINKING SCREEN	
+ + Next Screen - Prev Screen ?? More Actions >>>		
ED	Edit	INQ Inquiry/Print QU Quit
Select Action: Quit// ED		

Actions

- ED** Edit/Delete this reminder category
- INQ** List or print this reminder category
- QU** Return to previous screen.

CPRS Lookup Categories (CL)

Enter the Reminder Categories that you wish to be displayed on the reminder tree section of the note tab. These will appear in the "Other Categories" folder.

```
Select CPRS Reminder Configuration Menu Option: CL CPRS Lookup Categories
```

```
Reminder Categories for Lookup may be set for the following:
```

1	User	USR	[choose from NEW PERSON]
2	Location	LOC	[choose from HOSPITAL LOCATION]
3	Service	SRV	[choose from SERVICE/SECTION]
4	Division	DIV	[ISC SALT LAKE]
5	System	SYS	[DEVCUR.ISC-SLC.VA.GOV]

```
Enter selection: 1 User NEW PERSON
```

```
Select NEW PERSON NAME: GREEN, JON jg
```

```
----- Setting Reminder Categories for Lookup for User: GREEN, JON -----
```

```
Select Display Sequence: ?
```

Display Sequence	Value
1	SUBSTANCE ABUSE
5	HEPATITIS C
10	WEIGHT AND NUTRITION
15	SLC REMINDER CATEGORY
20	Usability Test Reminders

```
Select Display Sequence: 25
```

```
Are you adding 25 as a new Display Sequence? Yes//<Enter> YES
```

```
Display Sequence: 25// <Enter> 25
```

```
Reminder Category: ??
```

```
Choose from:
```

- Acute Pain
- Cancer Pain
- Chronic Pain
- HEPATITIS C
- JEREMY'S REMINDER CATEGORY
- Pain Management
- SLC REMINDER CATEGORY
- SUBSTANCE ABUSE
- USH POLICY
- Usability Test Reminders
- WEIGHT AND NUTRITION

```
Reminder Category: JON'S REMINDER CATEGORY
```

```
...OK? Yes// <Enter> (Yes)
```

```
Select Display Sequence: <Enter>
```

CPRS Cover Sheet Reminder List (CS)

Use this option to enter reminders that will be displayed on the CPRS cover sheet if the New Reminder Parameter option is set to No. If the New Reminders Parameter is set to Yes (ORQQPX NEW REMINDER PARAMS), you don't need to use this option.

```
Select CPRS Reminder Configuration Menu Option: CS CPRS Cover Sheet Reminder List

Clinical Reminders for Search may be set for the following:

    1  User          USR    [choose from NEW PERSON]
    2  Location      LOC    [choose from HOSPITAL LOCATION]
    3  Service       SRV    [choose from SERVICE/SECTION]
    4  Division      DIV    [ISC SALT LAKE]
    5  System        SYS    [DEVCUR.ISC-SLC.VA.GOV]

Enter selection: 1 User NEW PERSON
Select NEW PERSON NAME: green,JON      jg

----- Setting Clinical Reminders for Search for User: GREEN,JON -----
Select Display Sequence: ?

    Display Sequence      Value
    -----
    1                     VA-DIABETIC FOOT CARE ED.
    2                     VA-TOBACCO EDUCATION
    5                     VA-*PNEUMOCOCCAL VACCINE
    10                    VA-INFLUENZA VACCINE
    15                    VA-*BREAST CANCER SCREEN
    25                    TOBACCO USE SCREEN
    30                    VA-*CHOLESTEROL SCREEN (M)
    35                    VA-*COLORECTAL CANCER SCREEN (FOBT)
    40                    VA-*HYPERTENSION SCREEN

Select Display Sequence: 20
Display Sequence: 20// <Enter> 20
Clinical Reminder: MENTAL HEALTH TESTS
Select Display Sequence: <Enter>
```

Progress Note Headers (PN)

The header inserted into the progress note when processing a reminder may be modified for user, location, or service. The default header is Clinical Reminders Activity.

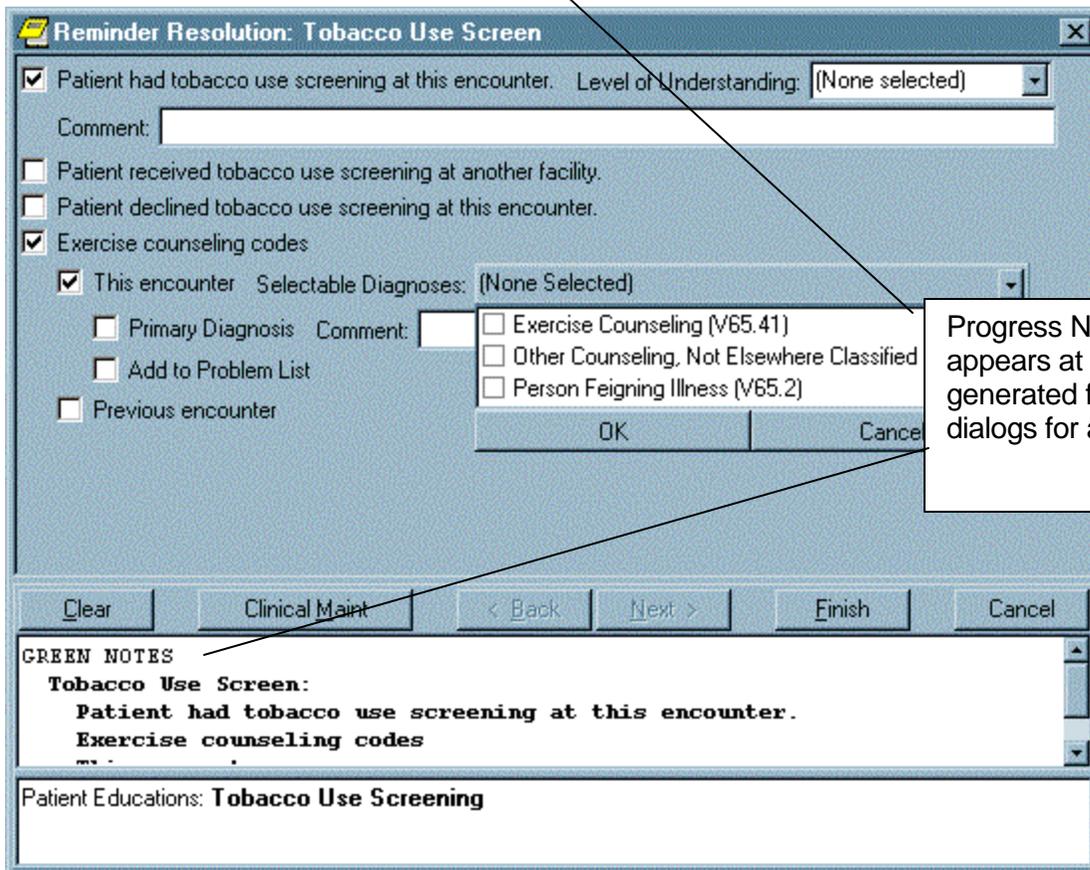
```
Select CPRS Reminder Configuration Menu Option: PN Progress Note Headers
Progress Note Header may be set for the following:
  1  User          USR    [choose from NEW PERSON]
  2  Location      LOC    [choose from HOSPITAL LOCATION]
  3  Service       SRV    [choose from SERVICE/SECTION]
  4  Division      DIV    [REGION 5]
  5  System        SYS    [DEVCUR.ISC-SLC.VA.GOV]
  6  Package       PKG    [CLINICAL REMINDERS]

Enter selection: 1 User NEW PERSON
Select NEW PERSON NAME: GREEN, JON    jg

----- Setting Progress Note Header for User: GREEN, JON -----
PROGRESS NOTE HEADER: ?

This response can be free text.

PROGRESS NOTE HEADER: GREEN NOTES
```



Mental Health Mental Health Dialogs Active [PXR M MENTAL HEALTH ACTIVE]

This option lets you modify the "Mental Health Active" CPRS parameter. You can activate mental health dialogs for reminder resolution processing at a user, service, division, or system level. When activated, mental health tests in a reminder dialog can be performed.

```
Select CPRS Reminder Configuration Option: MH  Mental Health Dialogs Active
```

```
Mental Health Active may be set for the following:
```

- | | | | |
|---|----------|-----|-------------------------------|
| 1 | User | USR | [choose from NEW PERSON] |
| 2 | Service | SRV | [choose from SERVICE/SECTION] |
| 3 | Division | DIV | [choose from INSTITUTION] |
| 4 | System | SYS | [DEVCUR.ISC-SLC.VA.GOV] |

```
Enter selection: 1  User  NEW PERSON
```

```
Select NEW PERSON NAME:  GRIN,JO  jg
```

```
----- Setting Mental Health Active  for User: GRIN,JO -----  
MENTAL HEALTH ACTIVE: YES// <Enter>
```

- | | |
|----|----------------------------------|
| CA | Add/Edit Reminder Categories |
| CL | CPRS Lookup Categories |
| CS | CPRS Cover Sheet Reminder List |
| MH | Mental Health Dialogs Active |
| PN | Progress Note Headers |
| RA | Reminder GUI Resolution Active |
| DL | Default Outside Location |
| PT | Position Reminder Text at Cursor |
| NP | New Reminder Parameters |

```
You have PENDING ALERTS
```

```
Enter "VA  VIEW ALERTS  to review alerts
```

```
Select CPRS Reminder Configuration Option: <Enter>
```

Reminder GUI Resolution Active (RA)

This option lets you activate GUI reminder resolution processing at a user, service, division, or system level. When activated, a reminders drawer is available on the notes tab for selecting and processing reminders.

```
Select CPRS Reminder Configuration Menu Option: RA Reminder GUI Resolution Active

Reminders Active may be set for the following:

    1  User          USR    [choose from NEW PERSON]
    2  Service       SRV    [choose from SERVICE/SECTION]
    3  Division      DIV    [choose from INSTITUTION]
    4  System        SYS    [DEVCUR.ISC-SLC.VA.GOV]

Enter selection: 1 User    NEW PERSON
Select NEW PERSON NAME: GREEN, JON    jg

----- Setting Reminders Active for User: GREEN, JON -----
REMINDERS ACTIVE: YES// <Enter>
```

Default Outside Location

Within portions of a reminder dialog where historical encounter information is entered, a new parameter, ORQQPX DEFAULT LOCATIONS, can be set up to define default outside locations for the PXRМ OUTSIDE LOCATION prompt. Each free-text entry in this multi-valued parameter will appear at the top of the list of locations in the drop-down list in CPRS. If a number is entered as the free text value, CPRS will attempt to locate an entry in the Institution file (#4) with the same internal entry number.

Example

```
Select CPRS Reminder Configuration Option: dl Default Outside Location
Default Outside Locations may be set for the following:
  1 User          USR    [choose from NEW PERSON]
  3 Service       SRV    [choose from SERVICE/SECTION]
  4 Division      DIV    [choose from INSTITUTION]
  5 System        SYS    [DEVCUR.ISC-SLC.VA.GOV]
  6 Package       PKG    [ORDER ENTRY/RESULTS REPORTING]
Enter selection: 1 User NEW PERSON
Select NEW PERSON NAME: GRIN,JON jg
----- Setting Default Outside Locations for User: GREEN,JOANN -----
Select Display Sequence: 1

Display Sequence: 1// 1
Outside Location (Text or Pointer): 663
Select Display Sequence: 2
Are you adding 2 as a new Display Sequence? Yes// <Enter> YES

Display Sequence: 2// <Enter>
Outside Location (Text or Pointer): Local Pharmacy

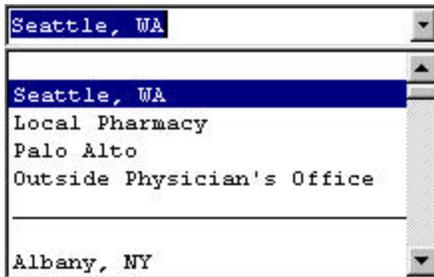
Select Display Sequence: 3
Are you adding 3 as a new Display Sequence? Yes// <Enter> YES
Display Sequence: 3// <Enter> 3
Outside Location (Text or Pointer): 640

Select Display Sequence: 4
Are you adding 4 as a new Display Sequence? Yes// <Enter> YES
Display Sequence: 4// <Enter> 4
Outside Location (Text or Pointer): Outside Physician's Office
Select Display Sequence: ???

Display Sequence          Value
-----
1                          663
2                          Local Pharmacy
3                          640
4                          Outside Physician's Office
```

Default Outside Location, cont'd

Default Location as it appears in CPRS:



Note that Seattle, WA and Palo Alto are entries in the institution file with internal entry numbers of 663 and 640, respectively.

Position Reminder Text at Cursor

The default behavior of reminder dialogs is to insert any text generated by the reminder dialog at the bottom of the current note. When the ORQQPX REMINDER TEXT AT CURSOR parameter is set, text will be inserted at the current cursor location.

```
Select CPRS Reminder Configuration Option: PT Position Reminder Text at Cursor
```

```
Position Reminder Text at Cursor may be set for the following:
```

1	User	USR	[choose from NEW PERSON]
3	Service	SRV	[choose from SERVICE/SECTION]
4	Division	DIV	[choose from INSTITUTION]
5	System	SYS	[DEVCUR.ISC-SLC.VA.GOV]

```
Enter selection: 1 User NEW PERSON
```

```
Select NEW PERSON NAME: <Enter> GRIN,JON jg
```

```
----- Setting Position Reminder Text at Cursor for User: GREEN,JOANN -----
```

```
REMINDER TEXT AT CURSOR: ?
```

```
Insert Reminder Dialog Generated Text at Cursor Location.
```

```
Select one of the following:
```

0	NO
1	YES

```
REMINDER TEXT AT CURSOR: YES
```

New Reminder Parameters

This option lets you activate a new parameter (ORQQPX NEW REMINDER PARAMS) for editing cover sheet reminders.

Cover Sheet Reminder List Edit

You can change the reminders list that appears on the Cover Sheet from three places:

- Action Menu in Available Reminders window
- Options under Tools Menu
- CPRS Cover Sheet Reminder List on the CPRS Reminder Configuration Menus Option (this option is described previously in this section of the Manager Manual.)

If you click on the Reminders button on the CPRS Cover Sheet, the Available Reminders window opens. You can select the Action menu, and then select Edit Cover Sheet Reminders List. You can also reach this same option from the Tools menu on the Cover Sheet, then selecting Options, and then Reminders.

Activating ORQQPX NEW REMINDER PARAMS) determines which of two dialogs you will see, *Clinical Reminders on Cover Sheet* or *Clinical Reminders and Reminder Categories Displayed on Cover Sheet*. Instructions for using these dialogs are given following a description of the New Reminder Parameters option.

New Reminder Parameters Example

```
Select CPRS Reminder Configuration Option: NP New Reminder Parameters

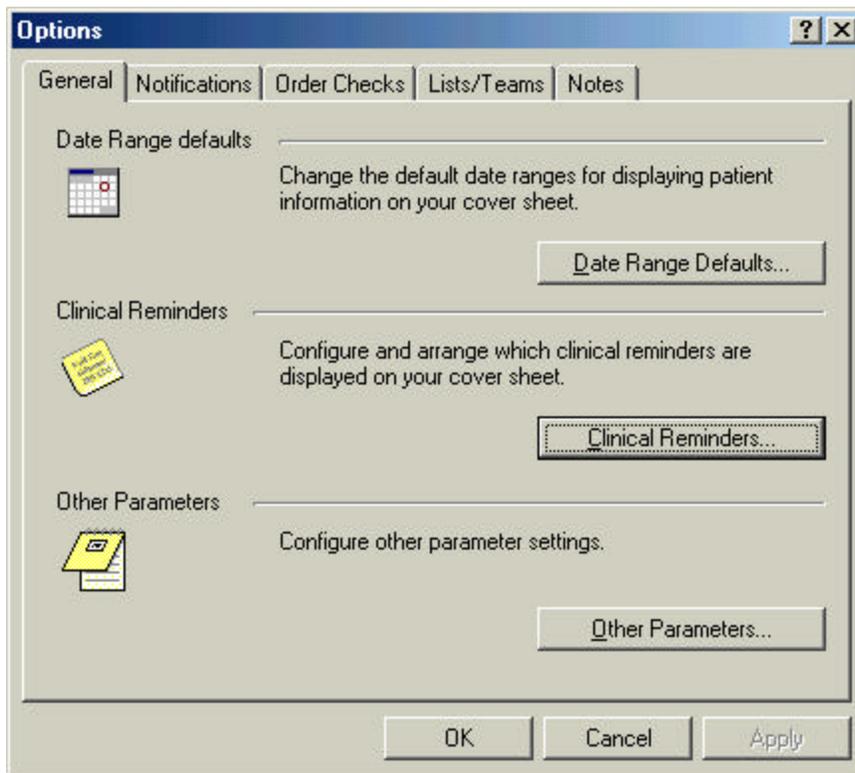
Use New Reminder Parameters may be set for the following:
  1  User          USR    [choose from NEW PERSON]
  2  Service       SRV    [choose from SERVICE/SECTION]
  3  Division      DIV    [choose from INSTITUTION]
  4  System        SYS    [DEVCUR.ISC-SLC.VA.GOV]
  5  Package       PKG    [ORDER ENTRY/RESULTS REPORTING]

Enter selection: 1 User    NEW PERSON
Select NEW PERSON NAME: GREEN,JOANN    jg

----- Setting Use New Reminder Parameters for User: GREEN,JOANN -----

USE NEW REMINDER PARAMS: YES
```

Options under the Tools Menu



Click on Clinical Reminders to configure reminders or to arrange which clinical reminders are displayed on the Cover Sheet.

A parameter setting determines which of two dialogs you will see:

- Clinical Reminders on Cover Sheet
- Clinical Reminders and Reminder Categories Displayed on Cover Sheet

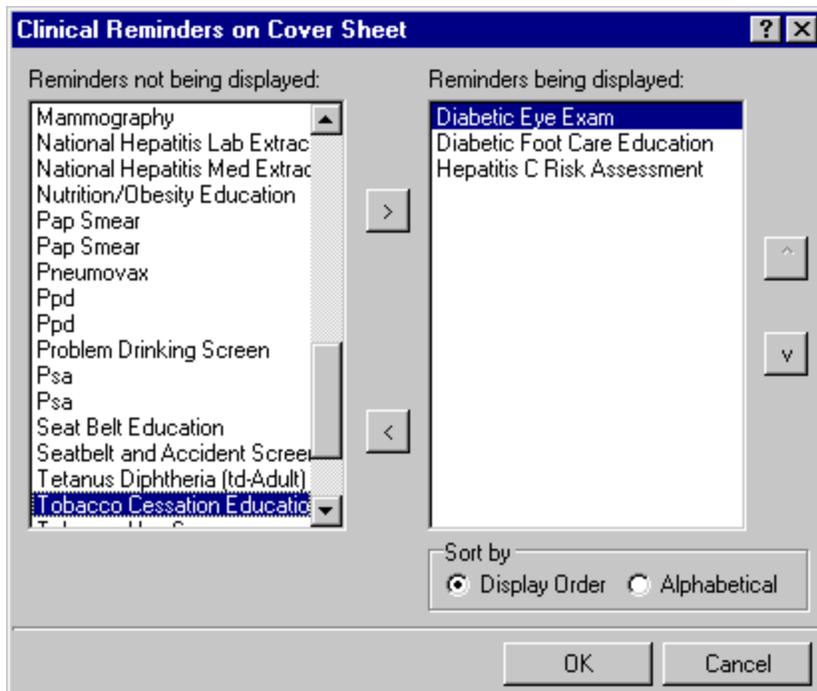
Your Clinical Coordinator sets the reminders parameter.

Clinical Reminders on Cover Sheet

From the dialog, highlight an item in the **Reminders not being displayed** field and then click the Add arrow ">" to add it to the **Reminders being displayed** field. You may hold down the Control key and select more than one reminder at a time. When you have all of the desired reminders in the **Reminders being displayed** field, you may highlight a reminder and use the up and down buttons on the right side of the dialog to change the order in which the reminders will be displayed on the Cover Sheet.

Sort by

Select Display Order to display the reminders in the order that you choose. Click Alphabetical to have the reminders displayed in alphabetic order.



Clinical Reminders and Reminder Categories Displayed on Cover Sheet

This advanced dialog provides more management capabilities than the first dialog. The dialog consists mainly of three large list areas.

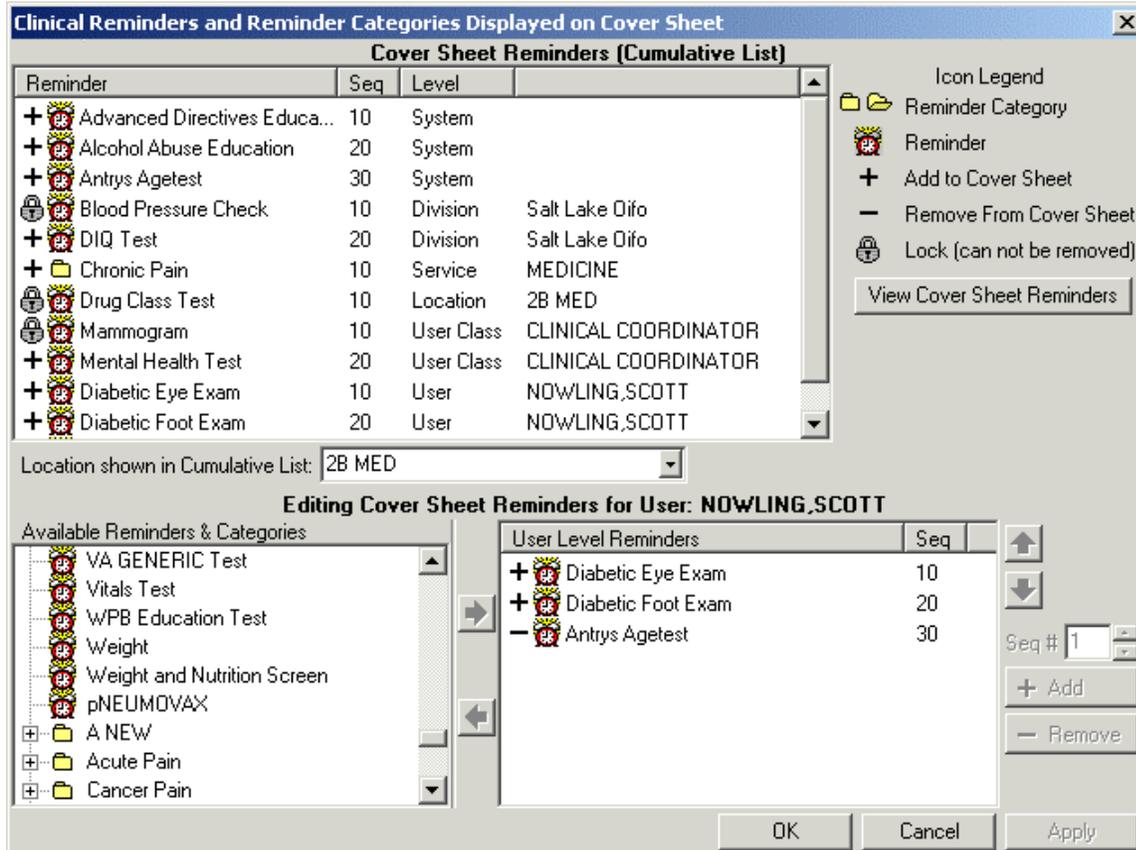
- *Cover Sheet Reminders (Cumulative List)* displays selected information on the Reminders that will be displayed on the Cover Sheet.
- *Available Reminders & Categories* lists all available Reminders and serves as a selection list.
- *User Level Reminders* displays the Reminders that you have added to or removed from the cumulative list.

You may sort the Reminders in *Cover Sheet Reminders (Cumulative List)* by clicking on any of the column headers. Click on the Seq (Sequence) column header to view the Reminders in the order in which they will be displayed on your cover Sheet.

Icon Legend

An icon legend is displayed to the right of *Cover Sheet Reminders (Cumulative List)*.

- Folder icon represents a group of Reminders
- Red alarm clock represents an individual Reminder.
- Plus sign in the first column means a reminder has been added to the list
- Minus sign in the first column means a reminder has been removed from the list
- Padlock icon means you can't remove reminder (mandatory)



Cover Sheet Reminders (Cumulative List)

The Level column of the Cover Sheet Reminders (Cumulative List) field displays the originating authority of the Reminder, which can include System, Division, Location, User Class, and User. Reminders on this list that display a small gray padlock icon at the beginning of the line cannot be removed. These Reminders are mandatory. The Seq (Sequence) column defines the order in which the Reminders will be displayed on the Cover Sheet. If there are two or more Reminders with the same sequence number, the Reminders will be listed by level (System, Division, Service, Location, User class, User).

Location shown in Cumulative List

Click on this drop-down box and select a location. The Reminders assigned to that location appear on the Cumulative List.

Available Reminders & Categories

This area displays all of the Reminders and Categories available to the user. Categories are groups of related Reminders that can be added as a group. Individual reminders within a category can be removed from the User Level Reminders field. Highlight a Reminder or Category from the field and click the right arrow to add them to the User Level Reminders field.

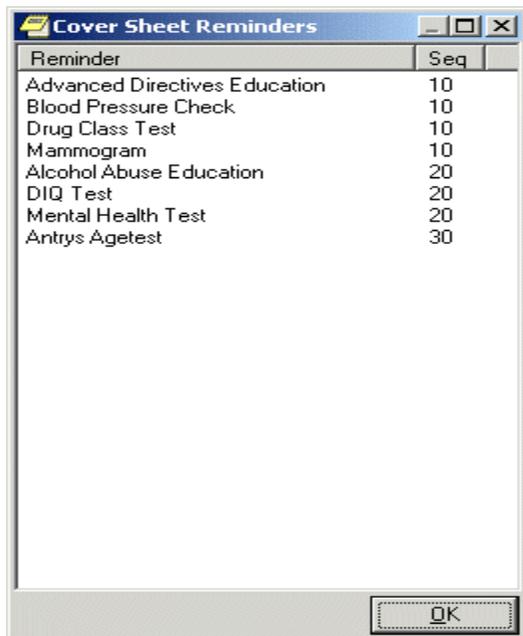
User Level Reminders

This area displays all of the Reminders selected by the user.

- To add a Reminder to your User Level Reminders, highlight the desired Reminder in the Available Reminders & Categories field and click the right arrow button.
- To delete a Reminder from your User Level Reminders field, highlight the Reminder in the User Level Reminders field and click the left arrow.
- To determine the order in which the Reminders will be displayed on the Cover Sheet, change the Reminder's Sequence number. For example, to place a Reminder at the top of the Reminders list, assign it a number less than 10.
- To change the order of User Level Reminders, highlight Reminders and click the up arrow or down arrow until the desired order is achieved.
- To remove any or all non-mandatory Reminders assigned at any level, add the Reminder to your User Level and then click the Remove button.

Cover Sheet Reminders

Once you have the Cumulative List as you want it, click **View Cover Sheet Reminders** to view how the reminders will be displayed on your Cover Sheet for the specified locations.



The screenshot shows a window titled "Cover Sheet Reminders" with a table of reminders. The table has two columns: "Reminder" and "Seq". The reminders listed are: Advanced Directives Education (Seq 10), Blood Pressure Check (Seq 10), Drug Class Test (Seq 10), Mammogram (Seq 10), Alcohol Abuse Education (Seq 20), DIQ Test (Seq 20), Mental Health Test (Seq 20), and Antrys Agetest (Seq 30). An "OK" button is located at the bottom right of the window.

Reminder	Seq
Advanced Directives Education	10
Blood Pressure Check	10
Drug Class Test	10
Mammogram	10
Alcohol Abuse Education	20
DIQ Test	20
Mental Health Test	20
Antrys Agetest	30

After you have made all of the desired changes to the Reminders that will be displayed on the Cover Sheet, click OK.

Setting up Clinical Reminders Components in Health Summary

Reminder items are added to health summary selection components for a given health summary type. When the health summary type is run, the Clinical Reminders software evaluates the patient's data and returns the results to the health summary for display.

Use options on the Health Summary Coordinator's Menu (on the Other Supporting Menus on the Clinical Reminders Manager Menu) to add Reminders components.

Health Summary Reminder Components

Reminders Due: An **abbreviated** component indicating only **what is due now**.

Example of *Reminder Due* as displayed on a health summary:

	--STATUS--	--DUE DATE--	--LAST DONE--
Advanced Directives Education	DUE NOW	DUE NOW	unknown
Alcohol Abuse Education	DUE NOW	DUE NOW	unknown

Reminder Summary: This component provides the status (Due Now, Due Soon, Resolved), next due date, and the last done date.

Example of *Reminder Summary* as displayed on a health summary:

	--STATUS--	--DUE DATE--	--LAST DONE--
Mammogram	RESOLVED	03/01/2000	10/01/1998
Pap Smear	DUE NOW	DUE NOW	unknown
Diabetic Eye Exam	DUE NOW	DUE NOW	10/01/1999

Reminder Maintenance: This component provides:

- Details about what was found from searching the VistA clinical data.
- Text related to the findings found or not found (as defined in the reminder). This includes taxonomies (ICD or CPT codes), health factors, and test results related to the reminder and computed findings (e.g., Body Mass Index).
- Final frequency and age range used for the reminder.

NOTE: Statuses include "DUE SOON," to allow you to process a reminder in advance, if convenient.

Example of Reminder Maintenance as displayed on a health summary:

----- CM - Reminder Maintenance -----			
	--STATUS--	--DUE DATE--	--LAST DONE--
Fecal Occult Blood Test	DUE NOW	DUE NOW	unknown
Applicable: Due every 1 year for ages 50 and older. No HX of colorectal cancer on file - presumed no HX.			
Health Factor Test	DUE NOW	DUE NOW	unknown
Applicable: Due every 1 year for ages 40 to 60. Baseline set to 1Y for 40-60.			

Chapter 4: Creating Reminder Dialogs

A Reminder dialog is a list of checkbox items that have been defined as potential actions to satisfy a reminder. The dialogs appear in a dialog box in the CPRS GUI when specific reminders are selected.

Reminder dialogs must be defined and linked to reminders before clinicians can resolve reminders through CPRS. Dialogs can be automatically generated from a reminder definition or created manually.

Example: A Reminder Dialog in CPRS

Reminder Resolution: Influenza Immunization

Influenza Vaccine given today.

Influenza vaccine is contraindicated.

You MUST complete both items:

Patient indicates a history of contraindication to influenza vaccine.
Comment:

Check here to enter allergy in patient's chart.

Patient indicated influenza vaccine was received within the past year.

Patient declined Influenza vaccine at this visit.

Clear Clinical Maint < Back Next > Finish Cancel

CLINICAL REMINDER ACTIVITY
Influenza Immunization:
Influenza vaccine is contraindicated.

Health Factors: **INACTIVATE INFLUENZA IMMUNIZATION**

Dialog Creation Process

When you create your dialog, make a plan. Consider the following:

- What kinds of actions do you want to record
(or in the terms of dialogs, what sentences do you want answered and how)?
- Do you want the dialog elements to satisfy the reminders?
- Do you want the dialog to trigger another reminder?

You can either autogenerate a dialog from a reminder definition or you can build the dialog manually. Each method has benefits and drawbacks.

Autogenerating Dialogs

Autogeneration creates dialog elements for all reminder findings using the dialog parameter files. Any unwanted autogenerated elements may be deleted and new elements/groups created manually.

Benefits of Autogeneration

The benefit of this is that the dialog is automatically linked to a reminder and has elements for all reminder findings. Dialog elements are created automatically with all the appropriate prompts.

Drawbacks of Autogeneration

The dialog includes all the dialog elements for all the reminder findings. Therefore, you will need to review the elements and remove any of these that you do not want.

Benefits of Manual Generation

You won't have lots of unwanted autogenerated prompts to clean up.

Drawbacks of Manual Generation

- You need to link the dialog to the reminder in a separate step.
- You have to have a naming convention.
- You have to know what dialog prompts to associate with the finding item (by referring to the General Finding Type Parameters).

Descriptions of both methods are shown later in this section.

For examples of dialogs created by sites, see the Clinical Reminders web page:

<http://vista.med.va.gov/reminders>

Steps to Manually Create a Dialog

1. Create the Dialog and add Dialog Elements.
 - Use the Reminder Dialog (DI) option on the Reminder Dialog Management menu.
 - Select the Change View (CV) action and then select D for Dialog.
2. Link the Dialog to the Reminder
 - Use Add/Edit Reminder Definition on the Reminder Definition Management menu.
 - Select the reminder, then select Reminder Dialog (D), then enter the name of your dialog.

Or

 - Use the Reminder Dialogs (DI) option on the Reminder Dialog Management menu
 - Select a reminder, then select the Linked Reminders action
3. Check the dialog in the CPRS GUI
4. Create a dialog group, if desired. See instructions later in this manual.
5. Add the dialog elements to the dialog group.
6. Add the dialog group to the reminder dialog, using the Reminder dialog (DI) option.
7. Check the dialog in the CPRS GUI

Steps to create the SLC Pneumococcal Vaccine Dialog by Autogeneration

The following description demonstrates how to create a dialog by autogenerating one from the reminder definition, using the dialog parameters distributed with the reminder package.

Autogeneration works as follows:

- a. When you select the action Autogenerate Dialog in the Reminder Dialog option, you are prompted, “GENERATE DIALOG AUTOMATICALLY?”
- b. If you respond yes, then for each finding item on the reminder, the REMINDER FINDING TYPE PARAMETER file #801.45 is checked to see if there are any “enabled” resolution statuses for the finding type.
- c. If an enabled resolution status exists, a dialog element (sentence) is added to the reminder dialog with sentences generated from the finding name, concatenated with prefix and suffix text.

Example: *Patient received Pneumo-vac at this encounter*

Patient received and *at this encounter* are the prefix and suffix Resolution Status text that is already in the file.

Step 1.

Decide which elements will appear in the reminder dialog. For example:

- Patient received pneumo-vac at this encounter.
- Patient indicates a history of contraindication pneumo-vac.
- Pneumococcal vaccine codes
- Patient Refuses Pneumococcal Vaccine
- Patient Refuses All Immunizations

The first three Elements will satisfy the reminder. The last two will make the reminder not applicable.

Elements may be added that don't affect the reminder. Such elements may have findings or may be text-only elements for display on the dialog screen or inclusion in the progress note.

Step 2:

Use the following Dialog Parameters options on the Reminder Dialog Management Menu to make sure all the elements are present and appropriately enabled or disabled. These are described on the next page.

- Health Factor Resolutions
- Finding Type Parameters
- Taxonomy Dialog Parameters (optional)

Creating a reminder dialog by autogeneration, cont'd

Health Factor Resolutions

A set of national codes is distributed with the reminder package:

- Done
- Done Elsewhere
- Contraindicated
- Patient Refused
- Ordered
- Other

Health Factor Resolutions must be entered for all the health factors on the reminder that should be included in the dialog. The AD option includes an action to select a reminder and then pass through all health factors in the reminder, allocating resolution statuses if needed.

Health factors are normally given the resolution status of OTHER.

Finding Type Parameters

The finding type parameters are distributed with the reminder package. These are the rules used to generate dialog elements (sentences) from the reminder definition. Different rules apply to different finding types. Immunizations generate three sentences for each finding:

- Immunization done
- Immunization done elsewhere
- Immunization contraindicated

Disable the finding parameters for the elements not required (in this case DONE ELSEWHERE) so that the dialog autogeneration will not include these sentences in the reminder dialog.

Taxonomy Dialog Parameters

Taxonomy dialog parameters contain lists of selectable procedure and diagnosis codes for each taxonomy. Installation of the Clinical Reminders package puts all codes in the taxonomy into the selectable list. The selectable codes may be modified, if required.

A dialog element for a taxonomy finding automatically includes multiple prompts:

- Taxonomy header
- Current Diagnosis/Procedure
- Historical Diagnosis/Procedure

The taxonomy dialog parameters contain the text for these prompts, which can be modified, if required, for individual taxonomies. Taxonomy dialog parameters can also be modified when editing the reminder dialog after the autogeneration has been run.

Creating a reminder dialog by autogeneration, cont'd

Step 3:

Use the Reminder Dialog option to autogenerate the dialog.

- a. Select DI from the Reminder Dialog Management Menu. A screen of reminders is displayed.
- b. Select the VA- *Pneumococcal Vaccine reminder.
- c. Use the AD action to autogenerate a reminder dialog with the same name as the reminder.
- d. Make sure that the dialog is enabled (answer YES to the "ENABLE DIALOG" prompt).
- e. Add, delete, change, or re-sequence dialog elements as required.
- f. Modify progress note text, if required.

Step 4:

Add the reminder to CPRS and set parameters for using reminder dialogs in CPRS. On the CPRS Reminder Configuration Menu, do the following steps, as needed:

- a. Add the reminder to the CPRS Cover Sheet List for the appropriate level. The reminder will appear on the cover sheet if due or in the reminder drawer if due or applicable.
- b. **OR** create a reminder category containing the reminder and add the reminder category to the CPRS Lookup Categories at the appropriate level.
- c. Activate dialogs with the Reminder GUI Resolution Active and Mental Health Dialogs Active options.
- d. Set a Default Outside Location.
- e. Turn on the parameter to position reminder text, using the Reminder Text at Cursor option.
- f. Activate New Reminder Parameters
Activating ORQQPX NEW REMINDER PARAMS determines which of two dialogs you will see, *Clinical Reminders on Cover Sheet* or *Clinical Reminders and Reminder Categories Displayed on Cover Sheet*.

Parameters can be set at the user, service, division, or system level. For testing purposes, it is probably best to set up reminders and categories at the user level.

Reminder Dialog Management Options

The options on the Reminder Dialog Management menu allow you to create and edit dialogs and to maintain the parameters used by CPRS for reminder dialog processing.

Synonym	Option	Option Name	Description
DP	Dialog Parameters	PXRM DIALOG PARAMETERS	This menu allows maintenance of parameters used in dialog generation.
DI	Reminder Dialogs	PXRM DIALOG/ COMPONENT EDIT	Dialog file entries may be created or amended with this option.

Dialog Parameters (DP)

Before you can create dialogs, the entries in the Dialog Parameters must be appropriate for the dialog you are creating. Although the autogeneration process inserts pre-defined elements from entries in the dialog parameters files, these may not all be appropriate for a specific dialog. Therefore, you should review these dialog parameters and edit them, as necessary.

Synonym	Option	Option Name	Description
RS	Reminder Resolution Statuses	PXRM RESOLUTION EDIT/INQ	This option lists the hierarchy of resolution status values used by CPRS.
HR	Health Factor Resolutions	PXRM HEALTH FACTOR RESOLUTIONS	For each health factor, one or more resolution statuses may be selected. When generating a reminder dialog for a reminder with a health factor finding, dialog items will only be generated for the resolution statuses selected.
FP	General Finding Type Parameters	PXRM PARAMETER EDIT/INQUIRE	This option lists the finding parameters used by Create Dialog from Reminder Definition.
FI	Finding Item Parameters	PXRM FINDING ITEM	If a reminder finding item will always be resolved by the same sentence (dialog element) or set of sentences (dialog group), an entry should be made in the finding item parameter file linking the reminder finding item to the dialog element or group. When a reminder dialog is generated, it will include the sentences defined in this file instead of generating a dialog using the FINDING TYPE PARAMETERS file.
TD	Taxonomy Dialog Parameters	PXRM DIALOG	The dialog for a taxonomy finding is created from the fields in this option each time the

			reminder dialog is passed to CPRS or viewed through the reminder dialog option.
--	--	--	---

Reminder Resolution Statuses (RS)

Reminder resolution statuses are maintained using this option. A national set of resolution statuses is released with the reminder package. Local resolution statuses may be defined, but must be linked to a national status.

The first screen in this option displays the existing resolution statuses:

Selection List	May 05, 2000 15:15:26	Page: 1 of 1
Reminder Resolution Status		
<u>1</u>		
Item	Reminder Resolution Status	National/Local
1	CONTRAINDICATED	NATIONAL
2	DONE AT ENCOUNTER	NATIONAL
3	DONE ELSEWHERE (HISTORICAL)	NATIONAL
4	INACTIVATE	NATIONAL
5	INFORMATIONAL	NATIONAL
6	LOCAL	LOCAL
7	ORDERED	NATIONAL
8	OTHER	NATIONAL
9	OTHER - DUE TO CLINICIAN DECISION	LOCAL
10	OTHER - DUE TO COHORT AGE	LOCAL
11	PATIENT REFUSED	NATIONAL
+ + Next Screen - Prev Screen ?? More Actions >>>		
AD	Add	PT List/Print All QU Quit
Select Item: Quit//		

AD Add a new local resolution status

Selection List	May 05, 2000 12:11:25	Page: 1 of 1
Reminder Resolution Status		
Item	Reminder Resolution Status	National/Local
1	CONTRAINDICATED	NATIONAL
2	DONE AT ENCOUNTER	NATIONAL
3	DONE ELSEWHERE (HISTORICAL)	NATIONAL
4	ORDERED	NATIONAL
5	OTHER	NATIONAL
6	PATIENT REFUSED	NATIONAL
+ + Next Screen - Prev Screen ?? More Actions >>>		
AD	Add	PT List/Print All QU Quit
Select Item: Quit// AD Add		

ED Edit resolution status

When you select a specific resolution status (for example, #6 in the list above), details of that status are displayed. You can then perform any of the actions listed below on that status. National statuses may not be added or deleted. Column headings are used in Reminder Activity Reports. Local statuses must be mapped to a national status.

Edit List	May 05, 2000 12:18:05	Page:	1 of 1		
Reminder Resolution Status Name: OTHER - DUE TO LIFE EXPECTANCY					
Resolution Status: OTHER - DUE TO LIFE EXPECTANCY					
Resolution Status Description Other due to life expectancy.					
Related National Status: OTHER					
Abbreviated name: OTHER - LIFE EXPECT					
Report Column Headings: OTHER - LIFE EXPECT					
Inactive Flag:					
+ + Next Screen - Prev Screen ?? More Actions >>>					
ED	Edit	INQ	Inquiry/Print	QU	Quit
Select Action: Quit// ED					

Edit List	May 05, 2000 12:18:05	Page:	1 of 1		
REMINDER RESOLUTION STATUS NAME: OTHER-DUE TO LIFE EXPECTANCY					
Resolution Status: OTHER-DUE TO LIFE EXPECTANCY					
Resolution Status Description Other due to life expectancy					
Related National Status: OTHER					
Abbreviated name: OTHER - LIFE EXPECT					
Report Column Headings: OTHER - LIFE EXPECT					
Inactive Flag:					
+ + Next Screen - Prev Screen ?? More Actions >>>					
ED	Edit	INQ	Inquiry/Print	QU	Quit
Select Action: Quit// ED Edit					
NAME: OTHER-DUE TO LIFE EXPECTANCY Replace <Enter>					
DESCRIPTION:					
1>Other due to life expectancy					
EDIT Option: <Enter>					
ABBREVIATED NAME: OTHER - LIFE EXPECT// <Enter>					
REPORT COLUMN HEADING: OTHER - LIFE EXPECT// OTHER - LIFE EXPECT with OTHER - LIFE EXP. <Enter>					
INACTIVE FLAG: <Enter>					

Health Factor Resolutions, cont'd

When you select a health factor resolution by number, an edit screen appears that displays the related resolution statuses and lets you edit or delete them. A health factor may be associated with more than one resolution status.

Edit List	May 05, 2000 15:50:41	Page:	1 of 1		
Health Factor Resolution Name: PAIN MGMT HF(660003)					
<u>Resolution Statuses</u>					
OTHER					
+ + Next Screen - Prev Screen ?? More Actions >>>					
ED	Edit	INQ	Inquiry/Print	QU	Quit
Select Action: Quit//					

Allocating Resolution Statuses for all Health Factors on a reminder

The option HR Health Factor Resolutions allows selection of reminders:

Selection List		May 05, 2000 10:14:51	Page:	1 of	2
Health Factor Resolutions					
Item	Health Factors	Resolution Status			
1	ACTIVATE TOBACCO USE SCREEN	OTHER			
2	ALCOHOL USE	OTHER			
3	BINGE DRINKING	OTHER			
4	CURRENT NON-SMOKER	OTHER			
5	CURRENT SMOKER	OTHER			
6	CURRENTLY PREGNANT	OTHER			
7	DRINKING ALONE	OTHER			
8	FAMILY HX OF ALCOHOL ABUSE	OTHER			
9	INACTIVATE BREAST CANCER SCREEN	OTHER			
10	INACTIVATE EXERCISE SCREEN	OTHER			
11	INACTIVATE FOBT CANCER SCREEN	OTHER			
12	INACTIVATE PNEUMOCOCCAL VACCINE	OTHER			
13	LIFETIME NON-SMOKER	OTHER			
14	LIFETIME NON-TOBACCO USER	OTHER			
15	NO RISK FACTORS FOR HEP C	DONE AT ENCOUNTER			
16	NUTRITION	OTHER			
+ + Next Screen - Prev Screen ?? More Actions >>>					
AD	Add	PT	List/Print All	QU	Quit
Select Item: Next Screen// AD Add					

```

Select one of the following:

      I      Individual Health Factor
      A      All Health Factors for a Selected Reminder

SELECTION OPTION: I// All Health Factors for a Selected Reminder

SELECT REMINDER: TOBACCO USE SCREEN

HEALTH FACTORS: <Enter>

ACTIVATE TOBACCO USE SCREEN (Resolution defined)
INACTIVATE TOBACCO USE SCREEN

MODIFY resolution status for ACTIVATE TOBACCO USE SCREEN: N//<Enter> 0
ADD resolution status for INACTIVATE TOBACCO USE SCREEN: N// YES
NAME: INACTIVATE TOBACCO USE SCREEN// <Enter>
Select RESOLUTION STATUS: OTHER
      ...OK? Yes// <Enter> (Yes)

Select RESOLUTION STATUS: <Enter>

```

General Finding Type Parameters (FP)

This option allows display of the REMINDER FINDING TYPE PARAMETER file #801.45 used in generating reminder dialogs. There is limited edit on this file to allow customization of prefix and suffix text. Parameters may also be disabled if not required at your site.

The file is structured by finding type and within that resolution status. Reminder dialog generated will include a sentence (dialog element) for each resolution type enabled in the finding type parameter file. The sentence text is constructed as prefix_finding item name_suffix. Health factors are treated slightly differently. Health factors are linked to resolution statuses by the Health Factor Resolutions option. For reminders with health factors, sentences are only generated if there is a resolution mapping AND an enabled finding type parameter.

The first screen in this option displays the finding types held in this file:

Selection List		May 05, 2000 16:06:40	Page: 1 of 1
Finding Type Parameters			
Item	Finding Type	Parameter	
1	PROCEDURE		
2	EDUCATION TOPIC		
3	EXAM		
4	HEALTH FACTOR		
5	IMMUNIZATION		
6	ORDERABLE ITEM		
7	DIAGNOSIS		
8	SKIN TEST		
9	VITAL MEASUREMENT		
+ + Next Screen - Prev Screen ?? More Actions >>>			
PT	List All	QU	Quit
Select Item: Quit//			

When you select an item from this screen, all of the finding type parameters for the finding type selected are displayed. The reminder dialog generation process uses this file to create dialog as follows:

For each finding item on the reminder, the REMINDER FINDING TYPE PARAMETER file is checked to see if there are any “enabled” resolution statuses for the finding type. If an enabled resolution status exists, then a dialog element (sentence) is added to the reminder dialog with sentence text generated from the finding name concatenated with prefix and suffix text

Example: *Patient had ALCOHOL USE education at this encounter*

General Finding Type Parameters, cont'd

Clicking on the checkbox displayed with this sentence in CPRS causes the finding item (from the original reminder definition) to be posted to this patient's record.

Additional prompts are also added to the dialog element as specified in the finding type parameter file.

Note: Dialog elements created by reminder dialog generation are given a standard name based on the finding type, finding name, and resolution status (from the REMINDER FINDING TYPE PARAMETER file)

Example: ED ALCOHOL USE DONE ELSEWHERE

The dialog elements created are shared by reminder dialogs for reminders with the same finding item.

The example below is the finding type parameter for education findings

<u>Resolution Status</u>	<u>Prefix//Suffix & Prompts/Values/Actions</u>	<u>Status</u>
1 DONE AT ENCOUNTER	Patient had/ /at this encounter 1] PXR COMMENT 2] PXR LOU (EDUCATION)	Enabled
2 DONE ELSEWHERE (HISTORICAL)	Patient indicated/ /was received outside the VA 1] PXR COMMENT 2] PXR VISIT DATE 3] PXR OUTSIDE LOCATION	Disabled
3 PATIENT REFUSED	Patient declined/ /at this encounter 1] PXR REFUSED (forced value) 2] PXR COMMENT	Disabled

+ + Next Screen - Prev Screen ?? More Actions >>>

INQ Inquiry/Print QU Quit

Select number of Resolution Status to Edit: Quit//

General Finding Type Parameters, cont'd

If a number is entered to select a resolution status, the following fields can be edited:

```
ED - EDIT FINDING TYPE PARAMETER

Finding Type Parameter Name: ED - EDUCATION TOPIC
RESOLUTION STATUS : DONE AT ENCOUNTER
DISABLE RESOLUTION STATUS: DISABLED// <Enter>
PREFIX TEXT: Patient had// <Enter>
SUFFIX TEXT: at this encounter// <Enter>
Select ADDITIONAL PROMPTS: PXRM LOU (EDUCATION)// <Enter>
  DISABLE ADDITIONAL PROMPT: <Enter>
  OVERRIDE PROMPT CAPTION: <Enter>
  START NEW LINE: <Enter>
  EXCLUDE FROM PN TEXT: <Enter>
  REQUIRED: <Enter>
```

Finding Item Parameters (FI)

This file allows reminder finding items to be linked to a specific dialog element (i.e. sentence and prompts) or a group of dialog elements. The reminder dialog generated for a reminder with a finding item entry in this file will include the dialog element or dialog group specified in this file instead of creating a dialog using the REMINDER FINDING TYPE PARAMETER file

The first screen in this option displays the finding items held in this file:

Selection List		May 05, 2000 10:35:36	Page:	1 of 1
Finding Item Parameters				
Item	Finding Item Type & Name	Dialog Group/Element	Status	
1	HF-ED SUBSTANCE ABUSE (OVERRIDE)	ED SUBSTANCE ABUSE REFUSED	Enabled	
2	HF-ALCOHOL	ALCOHOL DIALOG GROUP	Disabled	
+ + Next Screen - Prev Screen ?? More Actions >>>				
AD	Add	PT	List/Print All	QU Quit
Select Item: Quit//				

When you select a specific finding item parameter, details of the selected finding item parameter are displayed. You can then edit:

Edit List		May 05, 2000 10:48:25	Page:	1 of 1
Finding Item Parameter Name: ALCOHOL (ENABLED)				
Finding Type: HF(6)		Finding Item: ALCOHOL		
Dialog Group: ALCOHOL DIALOG GROUP (ENABLED)				
1) Dialog Element: HF BINGE DRINKING OTHER (ENABLED)				
Dialog Text: Binge drinking				
Additional Prompts: PXR COMMENT				
2) Dialog Element: HF DRINKING ALONE OTHER (ENABLED)				
Dialog Text: Drinking alone				
Additional Prompts: PXR COMMENT				
+ + Next Screen - Prev Screen ?? More Actions >>>				
ED	Edit	INQ	Inquiry/Print	QU Quit
Select Action: Quit//				

In the example above, the dialog elements have been previously generated automatically as part of another reminder dialog. A dialog group (ALCOHOL DIALOG GROUP) has then been created in Dialog Edit using these existing dialog elements. Finally an entry has been created in the finding item parameter to link HF(6) to the dialog group.

Taxonomy Dialog Edit (TD)

Dialogs for reminders with taxonomy findings are created from the REMINDER TAXONOMY file #811.2 as the dialog is passed to CPRS. This option maintains the fields used by this type of dialog. Changes made to a taxonomy dialog are immediately effective on reminder dialogs including the taxonomy finding item.

The first screen in this option displays all taxonomies:

Selection	List	May 05, 2000 11:14:48	Page: 1 of 3
Taxonomy Dialog			
<hr/>			
	Item Reminder Taxonomy		
	1 FTEST1		
	2 PAIN TAXONOMY		
	3 PROBTEST 1		
	4 PROBTEST 2		
	5 RADIOLOGY TAXONOMY		
	6 SLC DIABETES		
	7 SLC-Ear Mites		
	8 VA-ALCOHOL ABUSE		
	9 VA-ALCOHOLISM SCREENING		
	10 VA-BREAST TUMOR		
	11 VA-CERVICAL CA/ABNORMAL PAP		
	12 VA-CERVICAL CANCER SCREEN		
	13 VA-CHOLESTEROL		
	14 VA-COLORECTAL CA		
	15 VA-COLORECTAL CANCER SCREEN		
<hr/>			
+ + Next Screen - Prev Screen ?? More Actions >>>			
PT List All QU Quit			
Select Item: Next Screen//			

Taxonomy Dialog Edit, cont'd

If you select one of the items above, the dialog for the selected taxonomy is displayed:

Edit List		May 05, 2000 11:17:16	Page: 1 of 1
Taxonomy Name: SLC DIABETES			
Taxonomy Dialog			
1	Taxonomy header prompt		
1.1	Diagnosis this encounter		
	Selectable codes:	100.9 LEPTOSPIROSIS, UNSPECIFIED	
		391.8 MODIFIED TEXT	
1.2	Historical Diagnosis		
	Selectable codes:	100.9 LEPTOSPIROSIS, UNSPECIFIED	
		391.8 MODIFIED TEXT	
1.3	Current Procedure		
	Selectable codes:	10060 DRAINAGE OF SKIN ABSCESS	
		76091 MAMMOGRAM, BOTH BREASTS	
+ + Next Screen - Prev Screen ?? More Actions >>>			
ED	Edit	INQ Inquiry/Print	QU Quit
Select Action: Quit// Edit			
Dialog Text Fields			
DIALOG HEADER TEXT: Patient is diabetic//			
CURRENT VISIT DX DIALOG HDR: Diabetes diagnosis at this encounter			
Replace			
HISTORICAL VISIT DX DIALOG HDR: Previously diagnosed diabetic			
Replace			
CURRENT VISIT PR DIALOG HDR: Current Procedure//			
HISTORICAL VISIT PR DIALOG HDR: Historical Procedure			
Replace			
Dialog Selectable codes			
Select SELECTABLE DIAGNOSIS: 391.8//			
SELECTABLE DIAGNOSIS: 391.8//			
DISPLAY TEXT:			
DISABLED:			
Select SELECTABLE DIAGNOSIS:			
Select SELECTABLE PROCEDURE: 76091//			
SELECTABLE PROCEDURE: 76091//			
DISPLAY TEXT:			
DISABLED:			
Select SELECTABLE PROCEDURE:			
Dialog Generation Parameters			
GENERATE DIALOG DX PARAMETER:			
GENERATE DIALOG PR PARAMETER:			

All selectable codes for the taxonomy are preloaded at implementation. Codes not required may be disabled. The display text for the diagnosis/procedure may also be modified if the standard text for the code is not acceptable. If the taxonomy has only a few codes, then by setting the Generate Dialog DX/PR parameters, it is possible to create a dialog with individual sentences for each code. The sentences (dialog elements) are created from the REMINDER FINDING TYPE PARAMETER file (CPT/POV).

Reminder Dialogs (DI)

Use this option to create and edit Dialog file entries. When you first select the option, all of the available reminders at your facility are listed, with linked dialogs, if they exist, and dialog statuses. You can select a reminder by name or number and then perform actions on that reminder, or you can select the action CV Change View, which will allow you to autogenerate dialogs, and add dialog elements or groups, etc.

Select Reminder Dialog Management Option: DI Reminder Dialogs			
Dialog List		May 22, 2000 09:56:23	Page: 1 of 7
REMINDER VIEW (ALL REMINDERS BY NAME)			
Item	Reminder Name	Linked Dialog Name &	Dialog Status
1	AGETEST	AGETEST	Disabled
2	BLOOD PRESSURE CHECK		
3	DGENTEST		
4	EDUTEST	EDUTEST	
5	HEPATITIS C ASSESSMENT	HEPATITIS C ASSESSMENT	
6	JG BREAST CANCER SCREEN	JG BREAST CANCER SCREEN	
7	MENTAL HEALTH TESTS	MENTAL HEALTH TESTS	Disabled
8	Pain Assessment PS>=4		
9	SLC PNEUMOCOCCAL VACCINE	SLC PNEUMOCOCCAL VACCINE	
10	VA-*BREAST CANCER SCREEN		
+ + Next Screen - Prev Screen ?? More Actions >>>			
AR	All reminders	LR	Linked Reminders QU Quit
CV	Change View	RN	Name/Print Name
Select Item: Next Screen// CV			

Actions

- AR** All Reminders. All reminders are displayed.
- CV** Change view to see and select other reminder dialog types such as elements, forced values, and groups. Once a particular type has been selected, you can work with it..
- LR** Linked Reminders. Many dialogs may be generated from a reminder but the reminder may only be linked to one dialog for use in CPRS. This option allows that link to be changed.
*LR displays **ONLY** reminders that are linked to dialogs*
- RN** Name/Print Name. Toggle reminder name and reminder print name.
- QU** Return to previous screen.
- #** Enter the item number to be edited. Allows selection of a reminder dialog for editing.

Reminder Dialogs, cont'd

Notes:

- Reminder dialogs are linked to reminders by a field (REMINDER DIALOG) on the reminder definition. The reminder dialog may be used in CPRS if the reminder is due, applicable, or contained within a reminder category.
- A reminder dialog contains sentences (dialog elements) and/or groups of sentences (dialog groups) that are related to the reminder findings.
- Dialog groups can contain one or more sentences (dialog elements).
- Each sentence (dialog element) may have a number of additional prompts (e.g. date, location) or forced values (values that are automatically stuffed into a field, such as TIU Objects).
- New reminder dialogs can be created using the action AD – Autogenerate Reminder Dialog. This action appears after you select a reminder.
- The reminder dialog may be created manually or autogenerated from the reminder definition.
- The edit options allow changes to the selected reminder dialog. Keep in mind that dialog elements and prompts may be used in more than one reminder dialog. Changing one reminder dialog may affect others.

Reminder Dialog Types

If you select Change View (CV), dialog types are displayed. Use the CV action to switch between dialog types. Possible dialog types are:

D	Reminder Dialogs
E	Dialog Elements
F	Forced Values
G	Dialog Groups
P	Additional Prompts
R	Reminders
RG	Result Group (Mental Health)
RE	Result Element (Mental Health)

Reminder Dialog Fields

Prompt	Description
NAME	This is the name of the dialog entry. Reminder dialog entries will default to the name of the reminder for ease in identifying the reminder dialog entry. Dialog elements that are auto-generated use the following naming convention: Finding type prefix _Name from finding file __Resolution Status. Your site may want to create special namespacing for dialog entries that you create locally.
SOURCE REMINDER	This identifies which reminder definition is associated with this "Reminder Dialog" entry. "Reminder Dialog" type entries are the only entries that require this field.
DISABLE	This field disables use of this dialog when it contains text. The text should be a short message explaining why use of this dialog has been disabled, as it will be displayed if this dialog is selected.
TYPE	This field defines what type of dialog component this entry is. The type determines the processing that can occur with this entry.
CAPTION	The caption is used for prompt, dialog group, and reminder components. When a prompt has a caption defined, this is the text that should be used whenever the prompt is asked (e.g., Comment:). A dialog group can use the caption field to specify a header to use on a box around the group of dialog elements. The reminder dialog component can use the caption to specify a header to use on a box around the dialog elements for a reminder.
BOX	This flag will be used to determine whether the components will be presented to the user in a box. If the caption field is defined, it will appear as header text within in the top line of the box.
NUMBER OF INDENTS	This is the number of indents that should be made before presenting the group's components/elements. Indent is used only for dialog groups. (optional)
SHARE COMMON PROMPTS	This field is used only for a dialog group where different dialog elements have common prompts. Prompts will be shared for all dialog element unless otherwise selected.
GROUP ENTRY	Used for dialog groups only. 1 indicates that only one element in the dialog group may be selected. 2 indicates that one or more elements must be selected. 3 indicates that either none or one selection is required. 0 or null indicates no selection required.
COMPONENTS (Multiple) SEQUENCE	This field contains the components that are used to process a reminder. Generally the components relate to the TYPE of entry in the REMINDER DIALOG file: Reminder dialogs have dialog group or dialog element components. Dialog groups have a combination of dialog element components. Dialog elements have prompt and forced value components. This field specifies the order in which this item will be displayed or processed. (multiple field).

Dialog Fields, cont'd

Prompt	Description
<p>ITEM</p> <p>OVERRIDE PROMPT CAPTION</p> <p>START NEW LINE</p> <p>EXCLUDE FROM PN TEXT</p> <p>REQUIRED</p>	<p>This field points to a dialog which is subordinate to this dialog. NOTE: The parent dialog menu or one of its ancestors may not be entered as an item.</p> <p>This text will override the caption for this component in the reminder dialog, when the component is a prompt. When the text is blank, the caption from the prompt entry will be used.</p> <p>This flag is used to allow the user to have some control of the display of prompts related to a dialog element.</p> <p>This flag is used to control whether or not a component will be excluded from the progress note text when the component is acted upon. Additional prompt must be checked (defaults to not required).</p>
RESOLUTION TYPE	This field contains what type of resolution is represented by this dialog entry.
FINDING TYPE	<p>If an additional prompt is restricted to use with only one type of finding item, this field contains the mnemonic of the finding type. The mnemonics allowed are:</p> <p>CPT Procedure</p> <p>ED Education Topic</p> <p>EX Exam</p> <p>HF Health Factor</p> <p>IM Immunization</p> <p>OI Orderable Item</p> <p>POV Diagnosis (ICD9)</p> <p>ST Skin Test</p> <p>VM Vital Measurement</p>
FINDING ITEM	This field contains the finding item represented by this dialog entry.
ORDERABLE ITEM	Orderable item from the reminder definition.
ADDITIONAL FINDINGS	If additional finding items should be posted if the dialog is checked, then they should be entered in this field. The field is relevant to both dialog element and dialog group type records.
DEFAULT VALUE	This is the default value for an additional prompt.
FORCED VALUE	This is the value that will be used for a forced value type dialog.
EXCLUDE FROM PROGRESS NOTE	This field indicates that the question text of the dialog element will be excluded from the progress note. (optional).
PROMPT CAPTION	This is the caption that will be used for this prompt. This caption can be overridden by the OVERRIDE PROMPT CAPTION field in the ITEMS multiple, which can be more specific for the instance of the prompt.
DIALOG/PROGRESS NOTE TEXT	This field is only required if the text on the progress note differs from the dialog text.

Dialog Fields, cont'd

Prompt	Description
ALTERNATE PROGRESS NOTE TEXT	This field is used to define alternate text to add to the progress note when the progress note text needs to be different from the dialog text. (e.g., Dialog/ Progress Note Text displayed is "Place Influenza Order," but the Alternate Progress Note Text is "Ordered Influenza Vaccine at this encounter."). If there is no text in this field the dialog text will be added to the progress note.
CHECKBOX SEQUENCE	Comment prompts (with a GUI Process ID of COM) may have a number of checkboxes associated with the comment prompt.
GUI PROCESS ID	Additional prompts and forced values that update PCE should have a GUI Process ID. If an additional prompt or forced value is created by copying one of the PXR prompts the GUI Process ID field will automatically be populated by the copy process.
HIDE/SHOWGROUP	Used for dialog groups. 1 indicates that the group will be hidden until checked; 0 indicates that the group will be displayed.
SUPPRESS CHECKBOX	If the field is set to SUPPRESS the dialog element or group header will be displayed without a checkbox. Otherwise the WP text will be presented with a checkbox.
INDENT PROGRESS NOTE TEXT	In a dialog group the dialog questions may be indented. This field allows the progress note text to be indented also.
RESULT CONDITION	CANT BE ALTERED EXCEPT BY PROGRAMMER.
EXCLUDE MH TEST FROM PN TEXT	This flag is used to control whether or not a mental health instrument questions will be excluded from the progress note text when the component is acted upon.
RESULT GROUP/ELEMENT	The result group or element is called on completion of a dialog and allows additional findings or progress note text to be added conditionally. Standard result groups for mental health tests are released with the package.
CLASS	This is the class of definition. National definitions cannot be edited. N NATIONAL V VISN L LOCAL
SPONSOR	This is the name of a group or organization that sponsors the reminder.
REVIEW DATE	The review date is used to determine when the definition should be reviewed to verify that it is current with the latest standards and guidelines.
EDIT HISTORY	If changes were made the date and the name of the user making the changes will be inserted automatically. You can optionally type in a description of the changes made during the editing session.

Edit/Delete Dialog

NOTE: The dialog edit option has been modified to allow dialog elements to be renamed even if they are used elsewhere.

Select Reminder by Number

If you enter a number for a reminder listed above, all dialogs for the selected reminder are displayed:

Dialog Selection List			May 03, 2000 10:54:16	Page: 1 of 1
REMINDER NAME: EDUTEST				
Item	Dialog Name	Latest Update	Linked Reminders	
This reminder is linked to dialog:				
1	EDUTEST1	Dec 30, 1999	EDUTEST	
Other dialogs generated from this reminder:				
2	EDUTEST	Dec 23, 1999	*NONE*	
3	EDUTEST2	Dec 24, 1999	*NONE*	
+ + Next Screen - Prev Screen ?? More Actions >>>				
AD	Autogenerate Dialog	QU	Quit	
LR	Link Reminder			
Select Item: Quit//				

Actions

AD Autogenerate Dialog. Allows a new reminder dialog to be generated from the reminder definition or for an existing dialog to be re-created.

LR Link Reminders. Many dialogs may be generated from a reminder, but the reminder may only be linked to one dialog for use in CPRS. This option allows that link to be changed.

QU Return to previous screen.

Enter the item number to be edited. Allows selection of a reminder dialog for editing.

Selecting AD to Autogenerate Dialog gives the following prompts:

```
GENERATE DIALOG AUTOMATICALLY: Y//  
ENTER A UNIQUE DIALOG NAME: EDUTEST//  
LINK DIALOG TO REMINDER: YES//  
ENABLE DIALOG: NO//  
REPLACE ANY EXISTING DIALOG ELEMENTS? NO//
```

If the reminder is not linked to a dialog, the default is to create a reminder dialog with the same name as the reminder and link the reminder to the new reminder dialog. The default is to set the dialog status to disabled so that it will not be immediately active in CPRS. If an existing dialog name is chosen, the option is given to overwrite the existing reminder dialog.

Dialog Edit, cont'd

Select Item

If you select a dialog item in the above screen, details of the dialog are displayed:

Sequence	Dialog Details	Disabled
1	Dialog element: ED SUBSTANCE ABUSE DONE Resolution: DONE AT ENCOUNTER Finding type: EDUCATION TOPIC Finding item: VA-SUBSTANCE ABUSE [ED(1)] Additional prompts: PXRМ LEVEL OF UNDERSTANDING PXRМ COMMENT PXRМ ADD TO PROBLEM LIST	PJH 1/26
2	Dialog element: ED SUBSTANCE ABUSE DONE ELSEWHERE Resolution: DONE ELSEWHERE (HISTORICAL) Finding type: EDUCATION TOPIC Finding item: VA-SUBSTANCE ABUSE [ED(1)] Additional prompts: PXRМ VISIT DATE PXRМ COMMENT PXRМ OUTSIDE LOCATION	

+	+ Next Screen	- Prev Screen	?? More Actions	>>>	
CO	Copy Dialog	DT	Dialog Text	RI	Reminder Inquiry
DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit
DP	Progress Note Text	INQ	Inquiry/Print		

Select Element: Next Screen// 1

Individual dialog elements may now be edited by selecting the sequence number of the element. If the dialog element is for a taxonomy finding, the taxonomy dialog can be modified from this screen.

If the dialog element is used in other reminder dialogs, these are listed before the element is edited. If the element is in use elsewhere, it cannot be deleted.

NOTE: The dialog edit option has been modified to allow dialog elements to be renamed even if they are used elsewhere.

Dialog Edit, cont'd

To customize a dialog element for the selected reminder dialog only, a copy of the selected dialog element can be made, as follows:

```
CURRENT DIALOG ELEMENT NAME: ED SUBSTANCE ABUSE DONE

      Select one of the following:
      E          Edit
      R          Copy and Replace current element
      D          Delete element from this dialog
Select Dialog Element Action: E// R Copy and Replace current element
REPLACE/COPY 'ED SUBSTANCE ABUSE DONE' Y//<Enter> ES
ENTER A UNIQUE NAME: ED SUBSTANCE ABUSE DONE (1) Replace
Completed copy of 'ED SUBSTANCE ABUSE DONE'
into 'ED SUBSTANCE ABUSE DONE (1)'
Replaced element'ED SUBSTANCE ABUSE DONE'
with 'ED SUBSTANCE ABUSE DONE (1)'
on this dialog.
Do you want to edit now Y// <Enter>
```

Deleting a dialog line by sequence number

```
Dialog Edit List          Feb 14, 2000 11:51:17          Page: 1 of 1
REMINDER DIALOG NAME: AGETEST (DISABLED - DISABLED AT AUTOGENERATE)

Sequence      Dialog Text
-----
10            TEXT LINE

+      + Next Screen  - Prev Screen  ?? More Actions      >>>
CO  Copy Dialog      DT  Dialog Text      RI  Reminder Inquiry
DD  Detailed Display  ED  Edit/Delete Dialog  QU  Quit
DP  Progress Note Text  INQ Inquiry/Print
Select Sequence: Quit// 10
```

```
CURRENT DIALOG ELEMENT NAME: SPECIAL FOR ADDITION TEST

      Select one of the following:

      E          Edit
      R          Copy and Replace current element
      D          Delete element from this dialog

Select Dialog Element Action: E// D Delete element from this dialog
```

Dialog Edit, cont'd

Adding a sequence number and creating a new dialog element

If no elements exist, enter a sequence number to create a new element.

Dialog Selection List		Feb 14, 2000 11:51:25		Page: 1 of 1	
REMINDER DIALOG NAME: AGETEST (DISABLED - DISABLED AT AUTOGENERATE)					
Sequence	Dialog Text				
<hr/>					
+ + Next Screen - Prev Screen ?? More Actions >>>					
CO	Copy Dialog	DT	Dialog Text	RI	Reminder Inquiry
DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit
DP	Progress Note Text	INQ	Inquiry/Print		
Select Sequence: Quit// 1					

```
ARE YOU ADDING 1 AS A NEW SEQUENCE NUMBER: N// Y YES

Select new DIALOG ELEMENT: INFO TOBACCO USER
  Are you adding 'INFO TOBACCO USER' as
  a new REMINDER DIALOG? No// Y (Yes)
  REMINDER DIALOG TYPE: E dialog element
CURRENT DIALOG ELEMENT NAME: INFO TOBACCO USER
Used by: AGETEST (Current Reminder Dialog)

DISABLE:
CLASS: L LOCAL
SPONSOR: <Enter>
REVIEW DATE: <Enter>
RESOLUTION TYPE:
ORDERABLE ITEM: <Enter>
FINDING ITEM:
DIALOG/PROGRESS NOTE TEXT:
  No existing text
  Edit? NO// YES

==[ WRAP ]==[ INSERT ]===== < DIALOG WORD PROCESSING >===== [ <PF1>H=Help ]=====
TOBACCO USER LINE OF TEXT

<=====T=====T=====T=====T=====T=====T=====T=====T=====T>=====

ALTERNATE PROGRESS NOTE TEXT:
  No existing text
  Edit? NO// <Enter>
EXCLUDE FROM PROGRESS NOTE: <Enter>
SUPPRESS CHECKBOX: <Enter>
Select SEQUENCE: <Enter>
```

Adding a new sequence number with an existing dialog element

Dialog Selection List		Feb 14, 2000 11:52:26	Page: 1 of 0																							
REMINDER DIALOG NAME: AGETEST (DISABLED - DISABLED AT AUTOGENERATE)																										
Sequence	Dialog Text																									
1	TOBACCO USER LINE OF TEXT																									
<table border="0"> <tr> <td>+</td> <td>+ Next Screen</td> <td>- Prev Screen</td> <td>?? More Actions</td> <td>>>></td> </tr> <tr> <td>CO</td> <td>Copy Dialog</td> <td>DT</td> <td>Dialog Text</td> <td>RI</td> <td>Reminder Inquiry</td> </tr> <tr> <td>DD</td> <td>Detailed Display</td> <td>ED</td> <td>Edit/Delete Dialog</td> <td>QU</td> <td>Quit</td> </tr> <tr> <td>DP</td> <td>Progress Note Text</td> <td>INQ</td> <td>Inquiry/Print</td> <td colspan="2"></td> </tr> </table>				+	+ Next Screen	- Prev Screen	?? More Actions	>>>	CO	Copy Dialog	DT	Dialog Text	RI	Reminder Inquiry	DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit	DP	Progress Note Text	INQ	Inquiry/Print		
+	+ Next Screen	- Prev Screen	?? More Actions	>>>																						
CO	Copy Dialog	DT	Dialog Text	RI	Reminder Inquiry																					
DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit																					
DP	Progress Note Text	INQ	Inquiry/Print																							
Select Sequence: Quit// 10																										

ARE YOU ADDING 10 AS A NEW SEQUENCE NUMBER: N// **YES**

Select new DIALOG ELEMENT: **SP**

1	SP EXERCISE COUNSELING	dialog element
2	SP EXERCISE COUNSELING PRIOR	dialog element
3	SPECIAL	dialog element
4	SPECIAL ELEMANT FOR THIS DIALOG ONLY	dialog element
5	SPECIAL FOR ADDITION TEST	dialog element

Press <RETURN> to see more, '^' to exit this list, OR
 CHOOSE 1-5: 1 SP EXERCISE COUNSELING dialog element

Dialog Selection List		Feb 14, 2000 11:52:42	Page: 1 of 1																							
REMINDER DIALOG NAME: AGETEST (DISABLED - DISABLED AT AUTOGENERATE)																										
Sequence	Dialog Text																									
1	TOBACCO USER LINE OF TEXT																									
10	Patient was given exercise counseling Primary Diagnosis Comment: Add to Problem List																									
<table border="0"> <tr> <td>+</td> <td>+ Next Screen</td> <td>- Prev Screen</td> <td>?? More Actions</td> <td>>>></td> </tr> <tr> <td>CO</td> <td>Copy Dialog</td> <td>DT</td> <td>Dialog Text</td> <td>RI</td> <td>Reminder Inquiry</td> </tr> <tr> <td>DD</td> <td>Detailed Display</td> <td>ED</td> <td>Edit/Delete Dialog</td> <td>QU</td> <td>Quit</td> </tr> <tr> <td>DP</td> <td>Progress Note Text</td> <td>INQ</td> <td>Inquiry/Print</td> <td colspan="2"></td> </tr> </table>				+	+ Next Screen	- Prev Screen	?? More Actions	>>>	CO	Copy Dialog	DT	Dialog Text	RI	Reminder Inquiry	DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit	DP	Progress Note Text	INQ	Inquiry/Print		
+	+ Next Screen	- Prev Screen	?? More Actions	>>>																						
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DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit																					
DP	Progress Note Text	INQ	Inquiry/Print																							
Select Sequence: Quit//																										

NOTE: If you have the same CPT code entered from multiple reminders, they are all still being entered just once for the encounter, and that one entry can't have multiple values for its PCE comment field. The ability to add text only prompts should be coming in v15 of CPRS.

Dialog Groups

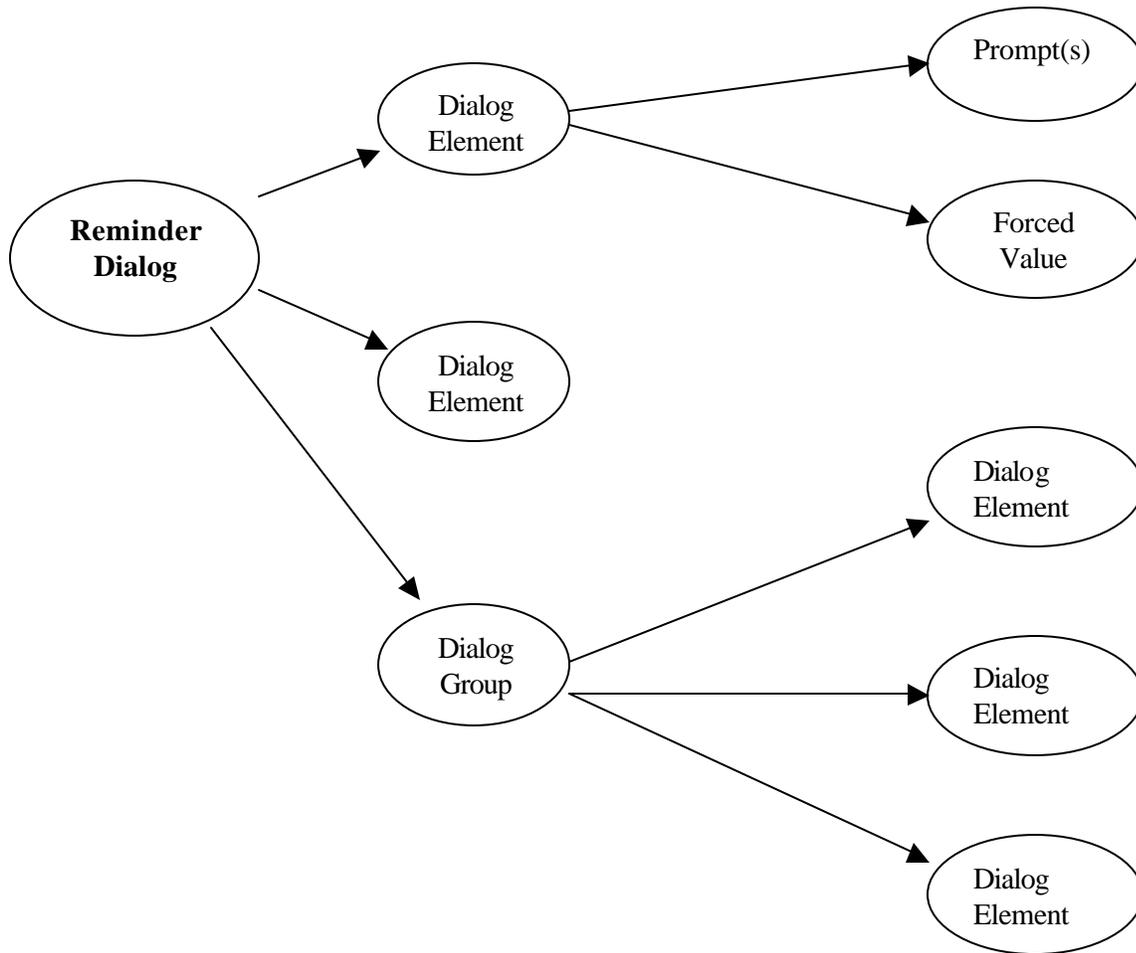
For more complicated dialogs, you can group sentences within a dialog element, using a dialog group. Dialog groups also enable you to prohibit the selection of more than one element. Dialog groups may also contain other dialog groups.

This is an example of a reminder dialog containing a single dialog group

The screenshot shows a window titled "Reminder Resolution:" with a close button (X) in the top right corner. The main content area contains a checked checkbox for "Diabetic foot care education at this encounter." followed by a "Level of Understanding:" dropdown menu set to "Good". Below this is a "Questionnaire" section with five items, each with a checkbox: "The importance of daily foot care was reviewed" (checked), "The patient understands that the loss of sensation leads to calluses which can break down, form ulcers and may lead to gangrene and amputation." (checked), "The patient understands the importance of daily foot hygiene. (Warm (NOT HOT) bathing of the feet, complete drying and complete inspection)." (checked), "The patient understands the importance of clean, non-restrictive socks/stockings and well fitting shoes." (unchecked), and "The patient understands the importance of immediate follow up on any foot injuries or ulcers." (unchecked). A callout box labeled "Prompt for group" points to the "Diabetic foot care education at this encounter." text. Another callout labeled "Dialog group text with finding of education topic **Diabetic Foot Care**" points to the entire questionnaire section. A third callout labeled "Group Caption" points to the "Questionnaire" header. Below the questionnaire are five buttons: "Clear", "Clinical Maint", "< Back", "Next >", and "Finish". A callout labeled "Dialog elements within group. Each dialog element may have specific findings" points to these buttons. At the bottom of the window, there is a text area containing the following text: "CLINICAL REMINDER ACTIVITY", "Diabetic foot care education at this encounter.", "Level of Understanding: Good", "The importance of daily foot care was reviewed", "The patient understands that the loss of sensation leads to calluses which can break down, form ulcers and may lead to gangrene and amputation.", "The patient understands the importance of daily foot hygiene. (Warm (NOT HOT) bathing of the feet, complete drying and complete inspection).", and "Patient Educations: **Diabetes Foot Care**".

Structure of a dialog group

A dialog group is similar to a dialog element, but may also contain a list of dialog elements or other dialog groups:



Dialog Group fields

Prompt	Description
DISABLE	Dialog will not be displayed in CPRS if there is anything in this field.
RESOLUTION TYPE	Used for future reporting.
FINDING ITEM	Finding item to be posted to PCE, orders, or mental health tests, if the group is checked (optional).
GROUP CAPTION	Text to appear as box caption if there is a box round the group (not included in P/N) (optional).
PUT A BOX AROUND THE GROUP	A box will be drawn around the elements in the group - defaults to no box.
SHARE COMMON PROMPTS	If elements in the group have a common additional prompt (e.g., comment) this will be displayed only once. (optional)
MULTIPLE SELECTION	Enter 1 for one selection only. Enter 2 for one or more. Enter 3 for none or one selection. Enter 0 for no selection required. 1 ONE SELECTION ONLY 2 ONE OR MORE SELECTIONS 3 NONE OR ONE SELECTION 0 NO SELECTION REQUIRED
HIDE/SHOW GROUP	Hide the group elements until the group checkbox is checked - defaults to show.
GROUP HEADER DIALOG TEXT	Text for the group checkbox (this will be added to the Progress Note).
GROUP HEADER P/N TEXT	Text for the P/N if this differs from the field above. (optional)
EXCLUDE FROM PROGRESS NOTE	Exclude the group header text from the P/N. (optional) NOTE: This now only applies to the group header text. Individual elements in the group must now be marked EXCLUDE FROM P/N individually using the ED option in the group edit.
SUPPRESS CHECKBOX	Display group header with no checkbox - defaults to do not suppress.
NUMBER OF INDENTS	Number of indents for elements in the group. (optional)
INDENT PROGRESS NOTE TEXT	Indent P/N the same as the dialog - defaults to no indent. (optional)
ADDITIONAL FINDINGS	Additional finding items to be posted to PCE, orders, or mental health tests, when the dialog group checkbox is checked. (optional)
SEQUENCE	Display sequence number and dialog elements (multiple field).

Steps to build a dialog group

When editing dialog groups from the Change View action of reminder dialogs, you now use the same editor as that used for reminder dialogs. Dialog group elements may be edited, copied/renamed, or deleted. It is no longer necessary to build component dialog elements before building the dialog group. Elements may be created from within the dialog group screen.

To build a reminder dialog containing a group, first build the dialog group, and then add it to the reminder dialog.

1. Decide which dialog elements will appear in the dialog group.
2. In the Reminder Dialog (DI) option, select the Change View (CV) action.
3. Choose G for Groups,
4. Enter AD to add a new dialog group.
5. Enter G for Group dialog type.
6. Use a prefix in the group name that distinguishes it from other dialog elements (e.g. GP).
7. Enter the parameters for the group (text, caption text, box, hide etc). If the group has a finding item then enter any additional prompts or forced values.
8. For each dialog element in the group, enter a sequence number and the dialog element name. If the dialog element is new, it may be created within this screen.

Adding a Dialog Group to a Reminder Dialog

1. To include the dialog group in a reminder dialog, use the Reminder Dialog (DI) option and enter the dialog group in the same manner as a dialog element.
2. Dialog and Progress note text and group parameters for the dialog group are displayed and can be edited from the DI Reminder Dialog option.
3. Test the reminder dialog within the GUI.
4. If individual dialog elements within the dialog group need modifying, use the Change View (CV) action and select E for Element to list and edit dialog elements.

Example: HEP C RISK ASSESSMENT

The reminder VA-HEP C RISK ASSESSMENT has risk terms/health factors that are mutually exclusive. You can create a dialog group and determine the dialog elements for the health factors.

HF PREV POSITIVE TEST FOR HEP C OTHER
HF RISK FACTOR FOR HEPATITIS C OTHER
HF NO RISK FACTORS FOR HEP C OTHER
HF DECLINED HEP C RISK ASSESSMENT OTHER

1. Choose the Reminder Dialog (DI) option to manually create a dialog group.
2. Choose the Change View (CV) action.
3. Choose G for Groups.
4. Choose AD to add a new dialog group. Use some prefix in the group name to distinguish it from other dialog elements (e.g. GP HEP C RISKS).

5. Enter the following parameters for the group (leaving all other fields blank):

GROUP CAPTION: **RISK FACTORS**
BOX ROUND GROUP: **YES**
MULTIPLE SELECTION: **ONE SELECTION ONLY**
SUPPRESS CHECKBOX: **SUPPRESS**

6. For each dialog element, enter a sequence number and the dialog element name.

<u>Seq.</u>	<u>Element</u>
1	HF PREV POSITIVE TEST FOR HEP C OTHER
2	HF RISK FACTOR FOR HEPATITIS C OTHER
3	HF NO RISK FACTORS FOR HEP C OTHER
4	HF DECLINED HEP C RISK ASSESSMENT OTHER

Dialog groups can be entered into a reminder dialog in the same way as a dialog element.

7. Using the DI Reminder Dialog option, remove the HF dialog elements from the VA-HEP C RISK ASSESSMENT dialog.
8. Then add group GP HEP C RISKS as a new sequence.

Reminder Resolution: Hepatitis C Risk Assessment

RISK FACTORS

- Patient known to have tested positive for C virus antibody or hepatitis C virus.
- Patient has risk factor(s) for hepatitis c.
- Patient indicates no risk factor(s) for hepatitis C.
- Patient had declined hep c risk assessment recorded.
- Hepatitis C diagnosis

Clear Clinical Maint < Back Next > Finish Cancel

<No encounter information entered>

Including a Dialog Group in Reminder Dialog Autogeneration

For a single finding item on the reminder definition, a number of standard dialog elements are created by the autogeneration, depending on the finding type parameters within the DP Dialog Parameters menu.

For example, generating a reminder dialog for a reminder with diabetic foot care education as a finding would create three standard dialog elements:

ED DIABETES FOOT CARE DONE
ED DIABETES FOOT CARE DONE ELSEWHERE
ED DIABETES FOOT CARE REFUSED

When reminder dialogs are generated for other reminders with this finding item, the reminder dialog created will use these same standard elements.

If a dialog group should always be used for a reminder finding item in dialog autogeneration (instead of the standard dialog elements), then the dialog group can be entered in the option Finding Item Parameters for the finding item. The dialog group will then be inserted into the generated reminder dialog instead of the standard dialog elements.

Editing Elements in the Group

This is a new method (with patch PXR*1.5*2) that allows groups to be edited in the same manner as reminder dialogs, by sequence number. Note that this does not change the way dialog groups can be edited from the reminder dialog screen.

1. Select the CV action, and then select List dialog groups. The following screen appears (unchanged). Select a dialog group (#1).

Item	Dialog Name	Dialog type	Status
1	A NEW DIALOG GROUP	Dialog Group	
2	ATS ADVANCED	Dialog Group	
3	ATS GROUP	Dialog Group	
4	ATS TOBACCO	Dialog Group	
5	Antry's Diabetic Exam Group	Dialog Group	
6	EC PNEUMO DONE	Dialog Group	
7	ED ADVANCED DIRECTIVES DONE	Dialog Group	
8	GP DEMO GROUP	Dialog Group	
9	GP DIABETIC FOOT	Dialog Group	

+ Next Screen		- Prev Screen		?? More Actions		>>>	
AD	Add	CV	Change View	INQ	Inquiry/Print		
CO	Copy Dialog	PT	List/Print All	QU	Quit		

Select Item: Next Screen// 1

2. Select DT display to see group information at the top and group element information below:

Sequence	Dialog Text
	This is a new group using the dialog group edit function [no caption for this group]
	Comment: Date: [NO BOX, NO SUPPRESS, SHOW, ONE ONLY]
1	Diabetic foot exam

+ Next Screen		- Prev Screen		?? More Actions		>>>	
CO	Copy Dialog Group	DP	Progress Note Text	ED	Edit/Delete Group		
DD	Detailed Display	DT	Dialog Text	QU	Quit		

Select Sequence: Quit// dd Detailed Display

Group text and caption

Group additional prompts

Other group fields

Group dialog elements

5. New elements may be added to the group by entering a new sequence number, just as with reminder dialogs. Existing elements may be selected by sequence number and edited, copied, or deleted from the dialog:

```

Dialog Edit List          Oct 31, 2000 09:27:52          Page: 1 of 1
DIALOG GROUP NAME: A NEW DIALOG GROUP

 Sequence      Dialog Details                                     Disabled
-----
 Finding type: HEALTH FACTOR
 Finding item: HEAVY DRINKER (3 OR MORE/DAY) [HF(17)]
 Additional prompts: PXRМ COMMENT
                   PXRМ VISIT DATE

 1             Dialog element: SP DIABETIC FOOT
 Resolution: DONE AT ENCOUNTER
 Finding type: EXAM
 Finding item: DIABETIC FOOT CHECK [EX(27)]

+       + Next Screen  - Prev Screen  ?? More Actions  >>>
CO  Copy Dialog Group  DP  Progress Note Text  ED  Edit/Delete Group
DD  Detailed Display   DT  Dialog Text         QU  Quit
Select Sequence: Quit// 10
ARE YOU ADDING 10 AS A NEW SEQUENCE NUMBER: N// y YES

Select new DIALOG ELEMENT:  ED DIABETES FOOT CARE REFUSED  dialog element
...OK? Yes// <Enter> (Yes)

```

```

Dialog Edit List          Oct 31, 2000 09:27:57          Page: 1 of 2
DIALOG GROUP NAME: A NEW DIALOG GROUP

 Sequence      Dialog Details                                     Disabled
-----
 Finding type: HEALTH FACTOR
 Finding item: HEAVY DRINKER (3 OR MORE/DAY) [HF(17)]
 Additional prompts: PXRМ COMMENT
                   PXRМ VISIT DATE

 1             Dialog element: SP DIABETIC FOOT
 Resolution: DONE AT ENCOUNTER
 Finding type: EXAM
 Finding item: DIABETIC FOOT CHECK [EX(27)]

10          Dialog element: ED DIABETES FOOT CARE REFUSED
 Resolution: PATIENT REFUSED
 Finding type: EDUCATION TOPIC
 Finding item: VA-DIABETES FOOT CARE [ED(359)]
 Additional prompts: PXRМ REFUSED (forced value)
                   PXRМ COMMENT

+       + Next Screen  - Prev Screen  ?? More Actions  >>>
CO  Copy Dialog Group  DP  Progress Note Text  ED  Edit/Delete Group
DD  Detailed Display   DT  Dialog Text         QU  Quit
Select Sequence: Next Screen// 1

```

```
CURRENT DIALOG ELEMENT NAME: SP DIABETIC FOOT
```

```
Select one of the following:
```

```
E      Edit  
C      Copy and Replace current element  
D      Delete element from this dialog
```

```
Select Dialog Element Action: E//
```

NOTE: If a dialog group has findings at the group level (as in the above example), the additional prompts/forced values for the group are entered via ED Edit/Delete Group. *Only dialog elements and dialog groups may be entered by sequence number.*

The dialog edit process now allows optional entry of 'ORDERABLE ITEM' on dialog elements.

Different Dialog and Progress Note Text

If you wish to have the progress note text different from the dialog text, you can use the action DD, Progress Note Text to create separate text. This is useful when the dialog text doesn't make sense in the context of a Progress Note. For example, if you would like the display to the user to have a prompt for "Enter Order for PPD," but would like the text that appears in the progress note to say "PPD Ordered," this feature will allow you to do that.

An optional field, ALTERNATEPROGRESS NOTE TEXT, should be entered if you wish to have the progress note text different from the dialog text. If this field is not entered, the dialog text will be entered into the progress note.

Text formatting

When the Result Dialog progress note text is entered into the word processing field, you have some control over the way the text is displayed in the CPRS GUI. To have the text appear in the GUI as it is in the word-processing lines, each line needs to start with a space. Lines that begin with text will be treated as if they can be wrapped or appended to the previous line, while the word processing lines will be treated as if they are "line mode" text (i.e., without word wrap) if there is a blank at the beginning of the line. Keep in mind the number of characters that will be available to print the line. Remember that CPRS uses indentations defined in the dialogs. If the line mode text ends up longer than the screen can display, the remaining text will be displayed on the next line by itself. The text will not be wrapped and concatenated with the next line's text as long as the next line starts with a space. Blank lines may be included to further format lines. A blank line will be treated as starting with a space.

Dialog Edit List		Feb 04, 2000 15:37:20		Page: 1 of 2	
REMINDER DIALOG NAME: 571 SECOND TEST (DISABLED - DISABLED AT AUTOGENERATE)					
Sequence	Dialog Text				
2	Education done previously. Date: Comment:				
3	Declined. PXRМ REFUSED (forced value) Comment:				
4	Advanced directives education done. Level of Understanding: Comment:				
5	Education outside the VA. Date: Comment:				
+ + Next Screen		- Prev Screen		?? More Actions	
CO	Copy Dialog	DT	Dialog Text	RI	Reminder Inquiry
DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit
DP	Progress Note Text	INQ	Inquiry/Print		
Select Sequence: Next Screen//DP					

Text formatting, cont'd

DIALOG/PROGRESS NOTE TEXT: <Enter>

Patient received advanced directive screening education outside the VA.

Edit? NO// <Enter>

ALTERNATE PROGRESS NOTE TEXT:

Education done previously.

Edit? NO// <Enter>

EXCLUDE FROM PROGRESS NOTE: <Enter>

SUPPRESS CHECKBOX: <Enter>

Select ADDITIONAL FINDINGS: ?

You may enter a new ADDITIONAL FINDINGS, if you wish
Enter additional finding items for this dialog element.
Enter one of the following:

ED.EntryName to select a EDUCATION TOPICS
IM.EntryName to select a IMMUNIZATIONS
ST.EntryName to select a SKIN TEST
EX.EntryName to select a EXAM
HF.EntryName to select a HEALTH FACTORS
CPT.EntryName to select a PROCEDURE
ICD9.EntryName to select a ICD9 DIAGNOSIS
VM.EntryName to select a VITAL TYPE
Q.EntryName to select a ORDER DIALOG

To see the entries in any particular file type <Prefix.??>

Select ADDITIONAL FINDINGS: <Enter>

RESULT GROUP/ELEMENT: ??

The result group or element is called on completion of a dialog and allows
additional findings or progress note text to be added conditionally.
Standard result groups for mental health tests are released with the
package.

Choose from:

AIMS RESULT ELEMENT 1 result element
AIMS RESULT GROUP result group
AIMS RESULT GROUP result group
AUDC RESULT ELEMENT 1 result elementSelect SEQUENCE: 2// <Enter>
SEQUENCE: 2// <Enter>
ADDITIONAL PROMPT/FORCED VALUE: PXRM COMMENT// <Enter>
OVERRIDE PROMPT CAPTION: <Enter>
START NEW LINE: <Enter>
EXCLUDE FROM PN TEXT: <Enter>
REQUIRED

Creating Comments from dialog elements

You can use prompt elements to build a comment, as shown in the following example:

NOTE: This can also be done by the new method of copying PXRМ COMMENT and adding checkbox sequences, as described on page 149.

The Colorectal Cancer element for this dialog has (site-specific) additional prompts. These are included in the comment box when checked.

Reminder Resolution: SLC Cancer Screen

Colorectal Cancer Screening was performed.
 not enlarged slightly enlarged moderately enlarged very enlarged
 non tender tender
 non modular modular
 smooth

Comment: Slightly enlarged, non tender, modular

Clear Clinical Maint < Back Next > Finish Cancel

CLINICAL REMINDER ACTIVITY
SLC Cancer Screen:
Colorectal Cancer Screening was performed.
Comment: Slightly enlarged, non tender, modular

Procedures: Colon CA screen;barium enema

Dialog element for colorectal cancer

```
Dialog Name: JM COLORECTAL CANCER SCREENING
CURRENT DIALOG ELEMENT/GROUP NAME: JM COLORECTAL CANCER SCREENING
Used by: JM DIALOG FOR DIABETIC EXAM (Reminder Dialog)
DISABLE: <Enter>
CLASS: L LOCAL
SPONSOR: <Enter>
REVIEW DATE: <Enter>
RESOLUTION TYPE: <Enter>
ORDERABLE ITEM: <Enter>
FINDING ITEM: G0106// <Enter>
DIALOG/PROGRESS NOTE TEXT:
Colorectal Cancer Screening
  Edit? NO// <Enter>
ALTERNATE PROGRESS NOTE TEXT:
  No existing text
  Edit? NO// <Enter>
EXCLUDE FROM PROGRESS NOTE: <Enter>
SUPPRESS CHECKBOX: <Enter>
Select ADDITIONAL FINDINGS: <Enter>
RESULT GROUP/ELEMENT: <Enter>
Select SEQUENCE: 16// ?
  Answer with COMPONENTS SEQUENCE, or ITEM
Choose from:
  1 JM NOT ENLARGED
  2 JM SLIGHTLY ENLARGED
  4 JM MODERATELY ENLARGED
  5 JM VERY ENLARGED
  10 JM NON TENDER
  11 JM TENDER
  15 JM NON MODULAR
  16 JM MODULAR
  50 PXR COMMENT
```

Note that the additional prompts for the element consist of a standard PXR COMMENT prompt and several local prompts. The prompt caption is the text that is added to the comment box. Create the local prompts from the CV option:

```
Select Item: Next Screen// cv Change View
  Select one of the following:
    D Reminder Dialogs
    E Dialog Elements
    F Forced Values
    G Dialog Groups
    P Additional Prompts
    R Reminders
    RG Result Group (Mental Health)
    RE Result Element (Mental Health)
TYPE OF VIEW: R// p Additional Prompts
```

Creating Comments from dialog elements, cont'd

Selection List		Mar 15, 2000 11:50:40		Page: 1 of 2	
DIALOG VIEW (ADDITIONAL PROMPTS)					
Item	Dialog Name	Dialog type		Status	
1	JM ADD TO PROBLEM LIST	Additional Prompt		Disabled	
2	JM LEVEL OF SEVERITY	Additional Prompt			
3	JM MODERATELY ENLARGED	Additional Prompt			
4	JM MODULAR	Additional Prompt			
5	JM NON MODULAR	Additional Prompt			
6	JM NON TENDER	Additional Prompt			
7	JM NOT ENLARGED	Additional Prompt			
8	JM SLIGHTLY ENLARGED	Additional Prompt			
9	JM TENDER	Additional Prompt			
10	JM TEST PROMPT	Additional Prompt			
11	JM VERY ENLARGED	Additional Prompt			
12	PXRM ADD TO PROBLEM LIST	Additional Prompt			
13	PXRM COMMENT	Additional Prompt			
14	PXRM CONTRAINDICATED	Additional Prompt			
15	PXRM LEVEL OF SEVERITY	Additional Prompt			
16	PXRM LEVEL OF UNDERSTANDING	Additional Prompt			
+ + Next Screen - Prev Screen ?? More Actions >>>					
AD	Add	CV	Change View	INQ	Inquiry/Print
CO	Copy Dialog	PT	List/Print All	QU	Quit
Select Item: Next Screen// 4					

Dialog Name: **JM MODULAR**

CURRENT DIALOG ELEMENT/GROUP NAME: **JM MODULAR**

Used by: JM COLORECTAL CANCER SCREENING (Dialog Element)

DISABLE Prompt: **<Enter>**

PROMPT CAPTION: modular// **<Enter>**

EXCLUDE FROM PROGRESS NOTE: **<Enter>**

DEFAULT VALUE: **<Enter>**

RESTRICTED TO FINDING TYPE: **<Enter>**

Comment Prompts

Reminder dialog with dialog group, dialog elements, and comment prompts:

Dialog Edit List		Nov 01, 2000 11:34:20	Page: 1 of 2
REMINDER DIALOG NAME: PJH TEST PATCH 2			
Sequence	Dialog Details		Disabled
5	Dialog element: LEARNING NEEDS ELEMENT Finding type: HEALTH FACTOR Finding item: LEARNING NEEDS ASSESSMENT [HF(4)] Additional prompts: PXRМ COMMENT ABILITY GOOD PROMPT ABILITY FAIR PROMPT ABILITY POOR PROMPT READINESS GOOD PROMPT READINESS POOR PROMPT	—————	Local prompts
10	Dialog element: SP SPACER		
15	Dialog group: LEARNING NEEDS GROUP Dialog elements: 1 PXRМ COMMENT 5 ABILITY GOOD 10 ABILITY FAIR 15 ABILITY POOR 20 READINESS GOOD	—————	Dialog Elements
+ + Next Screen - Prev Screen ?? More Actions >>>			
CO	Copy Dialog	DT	Dialog Text
DD	Detailed Display	ED	Edit/Delete Dialog
DP	Progress Note Text	INQ	Inquiry/Print
RI Reminder Inquiry			
QU Quit			
Select Sequence: Next Screen//			

Details of the dialog group

CURRENT DIALOG ELEMENT/GROUP NAME: LEARNING NEEDS GROUP
Used by: PJH TEST PATCH 2 (Current Reminder Dialog)
DISABLE:
CLASS: L LOCAL
SPONSOR: <Enter>
REVIEW DATE: <Enter>
RESOLUTION TYPE: DONE AT ENCOUNTER// <Enter>
ORDERABLE ITEM: <Enter>
FINDING ITEM: LEARNING NEEDS ASSESSMENT// <Enter>
GROUP CAPTION:
PUT A BOX AROUND THE GROUP: YES// <Enter>
SHARE COMMON PROMPTS: <Enter>
MULTIPLE SELECTION: <Enter>
HIDE/SHOW GROUP: SHOW// <Enter>
GROUP HEADER DIALOG TEXT: <Enter>
LEARNING NEEDS ASSESSMENT
Edit? NO// <Enter>
GROUP HEADER ALTERNATE P/N TEXT:
No existing text
Edit? NO// <Enter>

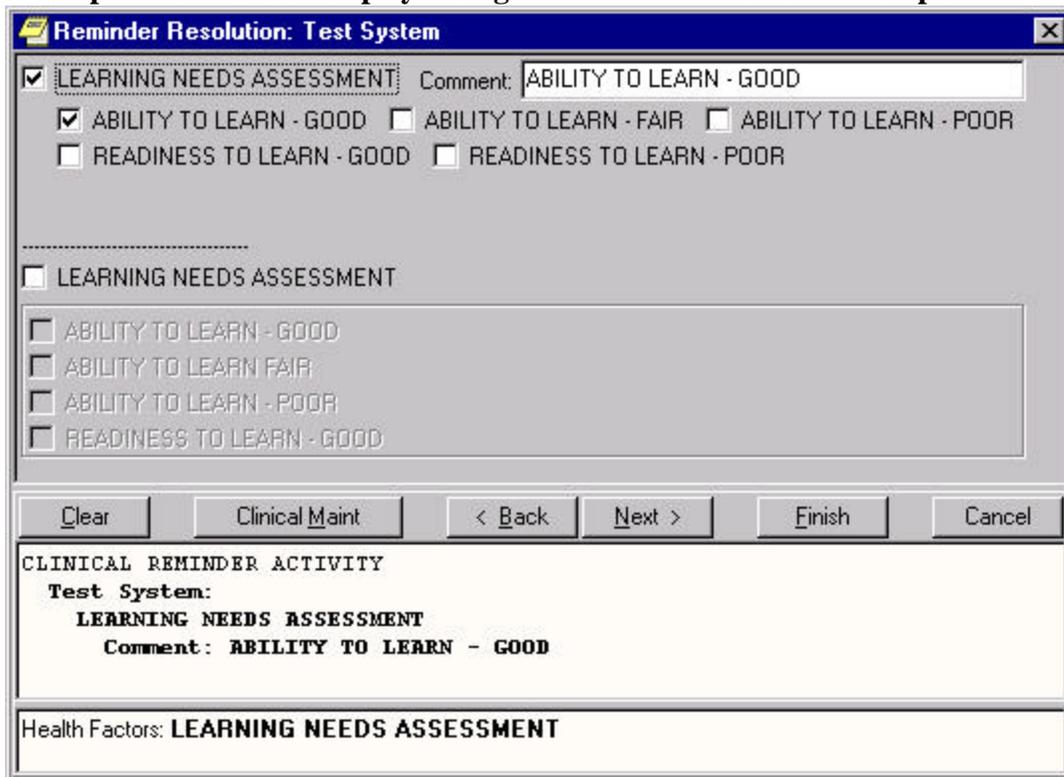
```

EXCLUDE FROM PROGRESS NOTE: <Enter>
SUPPRESS CHECKBOX: <Enter>
NUMBER OF INDENTS: <Enter>
INDENT PROGRESS NOTE TEXT: <Enter>
Select ADDITIONAL FINDINGS: <Enter>
Select SEQUENCE: ?
    Answer with COMPONENTS SEQUENCE, or ITEM
    Choose from:
    1      PXR COMMENT
    5      ABILITY GOOD
    10     ABILITY FAIR
    15     ABILITY POOR
    20     READINESS GOOD

```

NOTE: This can also be done by the new method of copying PXR COMMENT and adding checkbox sequences, as described on page 149.

Example of CPRS GUI display Dialog Element with Additional Prompts



Example of Dialog Group with Dialog Elements in CPRS GUI

Reminder Resolution: Test System

LEARNING NEEDS ASSESSMENT

LEARNING NEEDS ASSESSMENT Comment:

ABILITY TO LEARN - GOOD

ABILITY TO LEARN FAIR

ABILITY TO LEARN - POOR

READINESS TO LEARN - GOOD

Clear Clinical Maint < Back Next > Finish Cancel

CLINICAL REMINDER ACTIVITY
Test System:
LEARNING NEEDS ASSESSMENT

Health Factors: **LEARNING NEEDS ASSESSMENT**

NOTE: If you have the same CPT code entered from multiple reminders, they are all still being entered just once for the encounter, and that one entry can't have multiple values for its PCE comment field. The ability to add text only prompts should be coming in v15 of CPRS.

See NOIS "EKH-1000-42980, Additional Prompts Overwriting Each Other."

Changing a Dialog Element into a Dialog Group

Dialog elements can be changed into groups, using Edit/Delete Dialog (ED).

```

Dialog Selection List           Mar 03, 2000 10:02:04           Page: 1 of 2
REMINDER DIALOG NAME: 571 TEST
Sequence      Dialog Text
-----
 5           Patient had advanced directive screening education at this encoun
             Level of Understanding:
             Comment:
10           Patient had tobacco use screening education at this encounter.
             Level of Understanding:
             Comment:
             Questionnaire
10.3         Barrier to learning.

+      + Next Screen  - Prev Screen  ?? More Actions  >>>
CO  Copy Dialog      DT  Dialog Text      RI  Reminder Inquiry
DD  Detailed Display  ED  Edit/Delete Dialog  QU  Quit
DP  Progress Note Text  INQ  Inquiry/Print

Select Sequence: Next Screen// 15
-----
CURRENT DIALOG ELEMENT NAME: VM BP DONE

Select one of the following:

    E      Edit
    C      Copy and Replace current element
    D      Delete element from this dialog

Select Dialog Element Action: E// e Edit
Dialog Element Type: E// g Group
Dialog element changed to a dialog group
CURRENT DIALOG ELEMENT/GROUP NAME: VM BP DONE
etc...

```

The diagram shows two callout boxes with arrows pointing to specific fields in the dialog list:

- A box labeled "No caption for this group" has an arrow pointing to the "Comment:" field of sequence 5.
- A box labeled "Group caption" has an arrow pointing to the "Questionnaire" field of sequence 10.

Result Dialogs

Result dialogs contain progress note text that is added to a progress note, based on the results of dialog processing. (In the first release of Clinical Reminders V. 1.5, only Mental Health Instrument results can be used.)

Some reminder definitions will have Finding Items for MH Instruments. When dialog entries are generated for these reminders, a dialog element will be created for each MH Instrument finding. If a site doesn't want to see mental health instrument questions and answers added into the progress note, they can control whether to include the questions and answers by answering Yes to the EXCLUDE MH TEST FROM PN TEXT field in the dialog element.

```
EXCLUDE MH TEST FROM PN TEXT 0;14 SET
      '1' FOR YES;
      '0' FOR NO;
HELP-PROMPT:  Enter Y to stop test questions and answers from being
              added to the note text.
DESCRIPTION:  This flag is used to control whether or not
              mental health test questions and answers will be excluded
              from the progress note text when the test is taken.
```

When the user enters answers to a mental health instrument, the answers are automatically passed to the Mental Health package to calculate a result, which may be referenced as SCORE. For example, CAGE test has a SCORE from 1-4 and GAF has a SCORE from 1-99.

For most Mental Health tests, progress note text can be automatically generated that summarizes or includes the results (SCORE). Default text is distributed in the REMINDER DIALOG file #801.41 for sites to use for each Mental Health instrument processed in the reminder resolution process. This text may be copied and modified to reflect the site's preferences for text. The default text is defined in Mental Health Result Dialog Elements. The reminder manager must add the Result Dialog Elements to the MH Instruments Dialog Element RESULT GROUP/ ELEMENT field. This result dialog may define further processing to conditionally generate progress note text based on the SCORE.

The Result Dialog Elements provide a number of fields for flexible use of progress note text.

RESULT CONDITION: Enter M code which, when evaluated to 1, would generate the progress note text and create finding entries defined in the RESULT DIALOG ELEMENT. Currently, The logic can only use the value stored in an M local variable called SCORE.

ALTERNATE PROGRESS NOTE TEXT: Enter the word processing text to add to the progress note. Use a blank space in the first character of a line when you want the line to be printed as it appears in the text. The "|" (vertical bar) may be used around the M variable SCORE to include the score within the text (MH Tests only). Response values may be included in the text for the AIMS test only, and limited to the variables specified in the default AIMS text.

Example of one of the CAGE Result Dialog Elements distributed with the package:

NAME: CAGE RESULT ELEMENT 1 Replace <Enter>
RESULT CONDITION: I SCORE<2// <Enter>
ALTERNATE PROGRESS NOTE TEXT: <Enter>
An alcohol screening test (CAGE) was negative (score=|SCORE|).

Mental Health Test Dialogs, cont'd

This is the Inquiry/Print for result group ZUNG:

```
Select Item: Quit// I Inquiry/Print
Select Dialog Definition: PXRZ ZUNG RESULT GROUP      result group
...OK? Yes// <Enter> (Yes)

DEVICE: <Enter> ANYWHERE      Right Margin: 80// <Enter>
REMINDER DIALOG INQUIRY      Apr 14, 2000 10:17:35 am Page 1
-----
NUMBER: 207
Name: PXRZ ZUNG RESULT GROUP
Type: result group
Exclude from PN:

GROUP COMPONENTS:

Sequence: 1
Result Element: ZUNG RESULT ELEMENT 1
Element Condition: I SCORE<33
Element text:
A mood disorder screening test (ZUNG) was in the low range (score =
|SCORE|).

Sequence: 2
Result Element: ZUNG RESULT ELEMENT 2
Element Condition: I (SCORE>32)&(SCORE<51)
Element text:
A mood disorder screening test (ZUNG) was in the medium range (score =
|SCORE|).

Sequence: 3
Result Element: ZUNG RESULT ELEMENT 3
Element Condition: I SCORE>50
Element text:
A mood disorder screening test (ZUNG) was in the high range (score =
|SCORE|).
```

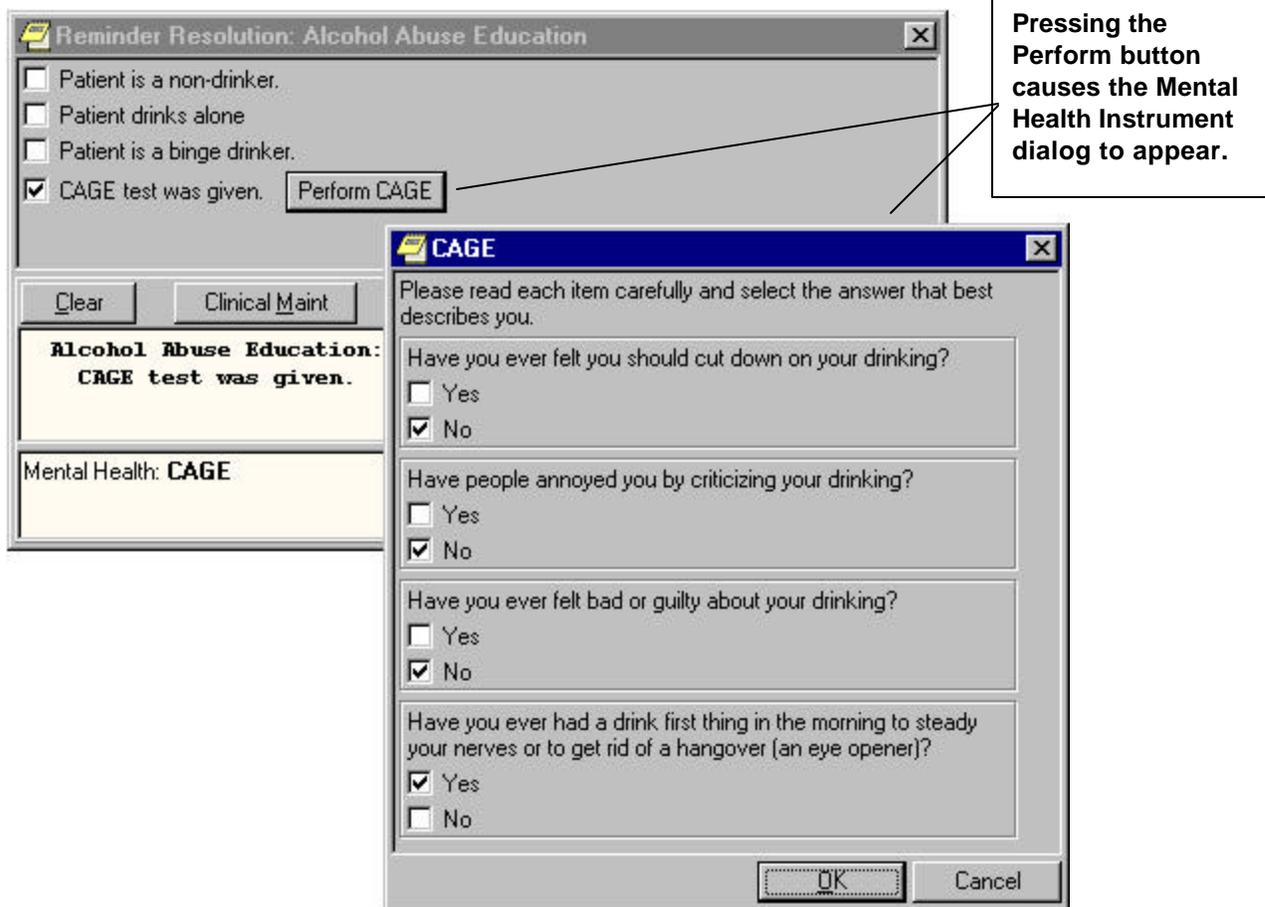
If the test results in a score of 66, then a progress note entry is created including the actual score:
“A mood disorder screening test (ZUNG) was in the high range (score = 66)”

Action CV within Reminder Dialogs allows result groups and result elements to be modified. The position of the score in the progress note text is defined by a |SCORE| marker in the result element.

NOTE: |SCORE| works like TIU Objects, by retrieving and inserting the score in place of the marker.

Mental Health Test Dialogs, cont'd

Example of giving a Mental Health Instrument:



After the test questions have been answered, result text for the test is entered into the progress note

Reminder Resolution: Alcohol Abuse Education

Patient is a non-drinker.
 Patient drinks alone
 Patient is a binge drinker.
 CAGE test was given. **Perform CAGE**

Clear Clinical Maint < Back Next > Finish Cancel

Alcohol Abuse Education:
CAGE test was given.
An alcohol screening test (CAGE) was negative (score=1).

Mental Health: CAGE

Mental Health
Result Text

TIU Objects

TIU objects may be embedded in the dialog sentence text, dialog progress note text, or the result progress note text (Mental Health).

The TIU object name should be included in the word processing text in the format *|object|*. For example, the dialog element sentence or progress note text would look like this:

Patient |PATIENT NAME| had smoking cessation education at this visit.

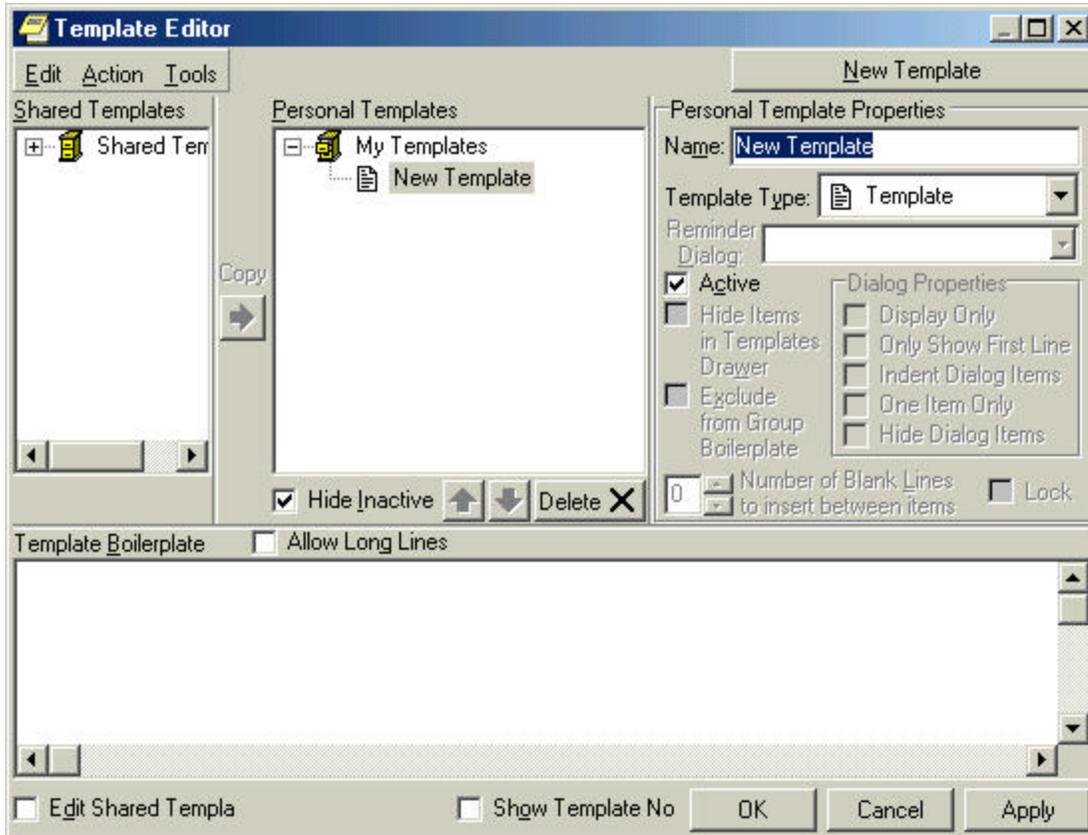
Note that the TIU object will not include any data input via the current dialog. This is not posted until the dialog processing is finished.

Creating Reminder Dialog Templates

Templates can be linked to Reminder dialogs. This allows you to use templates to place orders, enter PCE information, and enter vitals and mental health data.

Steps to create a Reminder Dialog:

1. On the Notes, Consults, or D/C Summ tab, bring up the Template Editor by selecting Options | Create New Template.



2. In the Name field under Personal Template Properties, type in a name for the new template. Follow the template name requirements*. You should also make the name descriptive of the content for ease of use.
3. Click on the drop-down button in the Template Type field and select Reminder Dialog.
4. Click on the drop-down button in the Dialog field and select the Reminder Dialog desired.

5. Place the template where you want it in the tree view.
 - a. Click the plus sign next to an item to see the objects under it.
 - b. Drag-and-drop the template to where you want it in the tree. (Or use arrows below the personal templates tree view.)

6. To save the template, click Apply. To save and exit the editor, click OK.

NOTE: You don't have to click Apply after each template, but it is recommended because if you click Cancel, you will lose all changes you have made since the last time you clicked Apply or OK.

Only Reminder Dialogs that are listed in the TIU Reminder Dialogs parameter can be linked to templates. If there are no Reminder Dialogs in this parameter, the Reminder Dialog template type will not be available.

***Template Name Requirements**

The template you are creating is automatically called "New Template," and you must rename it. Template names must begin with a letter or a number, be between 3 and 30 characters in length (including spaces), and can't be named "New Template." Give the template a meaningful name to help you remember its contents and to allow searching for the first word in the name.

Example: Autogenerating Dialog For Pneumococcal Vaccine Reminder

In the following pages, we describe how to create the dialog shown below.

SLC Pneumococcal Vaccine dialog as it appears in CPRS

Immunization

Taxonomy

Health Factors

IMMUNIZATION

Patient received pneumo-vac at this encounter.

Series: (None selected) Contraindicated

Reaction: (None selected)

Comment:

Patient indicates a history of contraindication pneumo-vac.

PRIOR IMMUNIZATION

Pneumococcal vaccine codes

OTHER

Patient refuses pneumococcal vaccine at this visit.

Patient refuses all immunizations.

Clear Clinical Maint < Back Next > Finish Cancel

CLINICAL REMINDER ACTIVITY

SLC Pneumovax:

Patient received pneumo-vac at this encounter.

1. Select the option DI Reminder Dialog from the Dialog Management menu:

```
Select Reminder Managers Menu Option: DM Reminder Dialog Management

    DP    Dialog Parameters ...
    DI    Reminder Dialogs
Select Reminder Dialog Management Option: DI Reminder Dialogs
```

Dialog List		Mar 22, 2001 09:56:23	Page: 1 of 7
REMINDER VIEW (ALL REMINDERS BY NAME)			
Item	Reminder Name	Linked Dialog Name &	Dialog Status
1	AGETEST	AGETEST	Disabled
2	BLOOD PRESSURE CHECK		

Example: Autogenerating Dialog For Pneumococcal Vaccine Reminder, cont'd

3. Edit the generated dialog, if necessary.

Dialog Selection List Feb 10, 2001 12:22:29 Page: 1 of 1
 REMINDER NAME: SLC PNEUMOCOCCAL VACCINE

Item	Dialog Name	Latest Update	Linked Reminders
1	SLC PNEUMOCOCCAL VACCINE	Feb 10, 2000	SLC PNEUMOCOCCAL VACCINE

This reminder is linked to dialog:

1 SLC PNEUMOCOCCAL VACCINE Feb 10, 2000 SLC PNEUMOCOCCAL VACCINE

+ + Next Screen - Prev Screen ?? More Actions >>>

AD Autogenerate Dialog QU Quit
 LR Link Reminder
 Select Item: Quit// 1

Dialog Edit List Feb 10, 2000 12:22:31 Page: 1 of 4
 REMINDER DIALOG NAME: SLC PNEUMOCOCCAL VACCINE

Sequence	Dialog Text
5	Patient received pneumo-vac at this encounter. Series: Contraindicated Reaction: Comment:
10	Patient indicates a history of contraindication pneumo-vac. Series: PXRМ CONTRAINDICATED (forced value) Reaction:
15	Pneumococcal vaccine codes
15.1	Prior Diagnosis for Pneumococcal Vaccine Selectable codes: V06.6 PROPHYLACTIC VACCINE AGAINST STREPTOCOCC

+ + Next Screen - Prev Screen ?? More Actions

CO Copy Dialog DT Dialog Text RI Reminder Inquiry
 DD Detailed Display ED Edit/Delete Dialog QU Quit
 DP Progress Note Text INQ Inquiry/Print

Select Sequence: Next Screen// 1

Enter a new sequence number to add a new element, as described on the next page.

Editing Dialog For Pneumococcal Vaccine—Add a new element

4. To add a new element, enter a new sequence number:

CO	Copy Dialog	DT	Dialog Text	RI	Reminder Inquiry
DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit
DP	Progress Note Text	INQ	Inquiry/Print		

Select Sequence: Next Screen// 1

5. Add the name of the new element, then respond to prompts about the element:

```
ARE YOU ADDING 1 AS A NEW SEQUENCE NUMBER: N// <Enter> YES
Select new DIALOG ELEMENT: SP IMM TEXT ONLY
  Are you adding 'SP IMM TEXT ONLY' as a new REMINDER DIALOG? No// Y (Yes)
  REMINDER DIALOG TYPE: E dialog element
CURRENT DIALOG ELEMENT/GROUP NAME: SP IMM TEXT ONLY
Used by: SLC PNEUMOCOCCAL VACCINE (Current Reminder Dialog)
DISABLE: <Enter>
Class: NATIONAL
Sponsor:
Review Date:
Edit History:
RESOLUTION TYPE: <Enter>
FINDING ITEM: <Enter>
DIALOG/PROGRESS NOTE TEXT:
  No existing text
  Edit? NO// YES
[WRAP]=[ INSERT ]=<DIALOG WORD PROCESSING>=[<PF1>H=Help]=IMMUNIZATIONS
<=====T=====T=====T=====T=====T=====T=====T=====T=====T=====
ALTERNATE PROGRESS NOTE TEXT:
  No existing text
  Edit? NO//<Enter>
EXCLUDE FROM PROGRESS NOTE: <Enter>
SUPPRESS CHECKBOX: 1 SUPPRESS
RESULT GROUP/ELEMENT: <Enter>
Select ADDITIONAL FINDINGS: <Enter>
ALTERNATE PROGRESS NOTE TEXT:
  No existing text
  Edit? NO// <Enter>
EXCLUDE FROM PROGRESS NOTE: <Enter>
SUPPRESS CHECKBOX: <Enter>
Select SEQUENCE: <Enter>
```

Editing Dialog For Pneumococcal Vaccine—Add a new element, cont'd

Dialog Edit List		Mar 15, 2000 13:10:23		Page: 1 of 4	
REMINDER DIALOG NAME: SLC PNEUMOCOCCAL VACCINE					
Sequence	Dialog Text				
1	IMMUNIZATIONS				
5	Patient received pneumo-vac at this encounter. Series: Contraindicated Reaction: Comment:				
10	Patient indicated pneumo-vac was received outside the VA. Contraindicated Date: Location: Comment:				
+ + Next Screen - Prev Screen ?? More Actions >>>					
CO	Copy Dialog	DT	Dialog Text	RI	Reminder Inquiry
DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit
DP	Progress Note Text	INQ	Inquiry/Print		
Select Sequence: Next Screen//					

6. Use the Reminder Dialogs option to remove elements from the dialog:

Dialog Edit List		Mar 15, 2000 13:16:03		Page: 1 of 4	
REMINDER DIALOG NAME: SLC PNEUMOCOCCAL VACCINE					
Sequence	Dialog Text				
1	IMMUNIZATIONS				
5	Patient received pneumo-vac at this encounter. Series: Contraindicated Reaction: Comment:				
10	Patient indicated pneumo-vac was received outside the VA. Contraindicated Date: Location: Comment:				
+ + Next Screen - Prev Screen ?? More Actions >>>					
CO	Copy Dialog	DT	Dialog Text	RI	Reminder Inquiry
DD	Detailed Display	ED	Edit/Delete Dialog	QU	Quit
DP	Progress Note Text	INQ	Inquiry/Print		
Select Sequence: Next Screen// 10					
CURRENT DIALOG ELEMENT NAME: IM PNEUMO-VAC DONE ELSEWHERE					
Select one of the following:					
	E	Edit			
	C	Copy and Replace current element			
	D	Delete element from this dialog			
Select Dialog Element Action: E// d Delete element from this dialog					

SLC PNEUMOCOCCAL VACCINE Reminder

NUMBER: 660062

SLC PNEUMOCOCCAL VACCINE

Print name: SLC Pneumovax
Class: NATIONAL
Sponsor:
Review Date:
Edit History:
Related VA-* Reminder: VA-*PNEUMOCOCCAL VACCINE
Reminder Dialog: SLC PNEUMOCOCCAL VACCINE
Priority: LOW

Reminder Description:

This "VA-*PNEUMOCOCCAL VACCINE" reminder is defined based on the following "Pneumococcal Vaccine" guidelines specified in the VHA HANDBOOK 1101.8, APPENDIX A.

Target Condition: Pneumococcal pneumonia.

Target Group: Outpatients age 65 and older.

Recommendation: All persons age 65 and older should receive one vaccination with pneumococcal vaccine in their lifetime.

Goal for FY 2000: 80% of individuals 65 and older have received pneumococcal vaccine.

Technical Description:

If this reminder is not going to be used at your facility, the INACTIVE FLAG should be set to inactive.

This reminder represents the minimum criteria for checking if the pneumococcal vaccine has been given to the patient.

The Ambulatory Care EP recommends a variation on this reminder represented in the "VA-PNEUMOVAX" reminder, which includes a check for diagnoses documented for the patient that would indicate the pneumococcal vaccine should be given to the patient regardless of the patients age.

Please review both of these reminder definitions, choose one of them to use. If local modifications need to be made, copy the preferred reminder to a new reminder and make your reminder modifications.

Baseline Frequency:

Do In Advance Time Frame: Do if DUE within 3 months
Sex Specific:
Ignore on N/A:

Frequency for Age Range: 99Y - Once for ages 65 and older
Match Text: Pneumovax due once for patients 65 and over.
No Match Text:

SLC PNEUMOCOCCAL VACCINE Reminder, cont'd

```
Findings:
    Finding Item:  PNEUMOCOCCAL (FI(1)=IM(19))
    Finding Type:  IMMUNIZATION
    Match Frequency/Age:  No change in frequency on match
    Use in Resolution Logic:  OR
    Finding Item:  VA-PNEUMOCOCCAL VACCINE (FI(2)=TX(25))
    Finding Type:  REMINDER TAXONOMY
    Match Frequency/Age:  No change in frequency on match
    Use in Resolution Logic:  OR
    Finding Item:  PATIENT REFUSES PNEUMOCOCCAL VACCINE
(FI(3)=HF(660022))
    Finding Type:  HEALTH FACTOR
    Match Frequency/Age:  No change in frequency on match
Use in Patient Cohort Logic:  AND NOT
    Finding Item:  PATIENT REFUSES ALL IMMUNIZATIONS (FI(4)=HF(660023))
    Finding Type:  HEALTH FACTOR
    Match Frequency/Age:  No change in frequency on match
Use in Patient Cohort Logic:  AND NOT
Default PATIENT COHORT LOGIC to see if the Reminder applies to a patient:
    (SEX)&(AGE)&'FI(3)&'FI(4)
Expanded Patient Cohort Logic:
    (SEX)&(AGE)&'FI(PATIENT REFUSES PNEUMOCOCCAL VACCINE)&'
    FI(PATIENT REFUSES ALL IMMUNIZATIONS)
Default RESOLUTION LOGIC defines findings which can resolve the Reminder:
    FI(1)!FI(2)
Expanded Resolution Logic:
FI(PNEUMOCOCCAL)!FI(VA-PNEUMOCOCCAL VACCINE)
```

Example of a dialog element

```
Dialog Name:  IM PNEUMO-VAC DONE
CURRENT DIALOG ELEMENT/GROUP NAME:  IM PNEUMO-VAC DONE
Used by:  VA-*PNEUMOCOCCAL VACCINE (Reminder Dialog)
          SLC PNEUMOCOCCAL VACCINE (Reminder Dialog)
DISABLE:  <Enter>
CLASS:  L  LOCAL
SPONSOR:  <Enter>
REVIEW DATE:  <Enter>
RESOLUTION TYPE:  DONE AT ENCOUNTER// <Enter>
ORDERABLE ITEM:  <Enter>
FINDING ITEM:  PNEUMOCOCCAL// <Enter>
DIALOG/PROGRESS NOTE TEXT:
Patient received pneumo-vac at this encounter.

    Edit? NO// <Enter>
ALTERNATE PROGRESS NOTE TEXT:
    No existing text
    Edit? NO// <Enter>
EXCLUDE FROM PROGRESS NOTE:  <Enter>
SUPPRESS CHECKBOX:  <Enter>
Select ADDITIONAL FINDINGS:  <Enter>
RESULT GROUP/ELEMENT:  <Enter>
Select SEQUENCE:  4// ?
    Answer with COMPONENTS SEQUENCE, or ITEM
```

SLC PNEUMOCOCCAL VACCINE Reminder, cont'd

Choose from:

- 1 PXRMSERIES
- 2 PXRMSERIES CONTRAINDICATED
- 3 PXRMSERIES REACTION
- 4 PXRMSERIES COMMENT

You may enter a new COMPONENTS, if you wish

Type a Number between .1 and 999.9, 1 Decimal Digit

Select SEQUENCE: 4// 1 PXRMSERIES

SEQUENCE: 1// <Enter>

PROMPT/FORCED VALUE: PXRMSERIES// <Enter>

OVERRIDE PROMPT CAPTION: <Enter>

START NEW LINE: YES//<Enter>

EXCLUDE FROM PN TEXT: <Enter>

REQUIRED: <Enter>

Select SEQUENCE: <Enter>

Example of Taxonomy Dialog

Dialog element: TX PNEUMOCOCCAL VACCINE CODES

Dialog Text Fields

DIALOG HEADER TEXT: <Enter>

CURRENT DIAGNOSIS DIALOG TEXT: Current Diagnosis for Pneumococcal Vaccine

Replace <Enter>

PREVIOUS DIAGNOSIS DIALOG TEXT: Prior Diagnosis for Pneumococcal Vaccine

Replace <Enter>

CURRENT PROCEDURE DIALOG TEXT: Current Procedure// <Enter>

PREVIOUS PROCEDURE DIALOG TEXT: Prior Procedure// <Enter>

Dialog Selectable codes

Select SELECTABLE DIAGNOSIS: V06.6//<Enter>

SELECTABLE DIAGNOSIS: V06.6// <Enter>

DISPLAY TEXT: <Enter>

DISABLED: <Enter>

Select SELECTABLE DIAGNOSIS: <Enter>

Select SELECTABLE PROCEDURE: G0009//<Enter>

SELECTABLE PROCEDURE: G0009//<Enter>

DISPLAY TEXT: <Enter>

DISABLED: <Enter>

Select SELECTABLE PROCEDURE: <Enter>

Dialog Generation Parameters

GENERATE DIALOG DX PARAMETER: <Enter>

GENERATE DIALOG PR PARAMETER: <Enter>

Alternate Dialog For Pneumococcal Vaccine

Reminder Resolution: Pneumococcal vaccine (pneumovax)

ORDER PNEUMOCOCCAL IMMUNIZATION:

- Order for pneumococcal vaccine placed.
- Order for influenza vaccine entered.

PRIOR IMMUNIZATION:

- Patient indicated that the pneumococcal vaccine was received previously.

Date/Time: 1997 ... Location: East Orange, NJ

Comment:

REFUSAL/CONTRAINDICATION:

- Patient indicates a history of contraindication to pneumococcal vaccination.
- Pt. has an acute illness. Vaccinations will be delayed until recovery from this illness.
- Patient has a life expectancy of less than 3 months. Evaluation and treatment may not be useful at this time.
- Patient refuses pneumococcal immunization.
- Patient refuses all immunizations at this time.

Clear < Back Next > Finish Cancel

Pneumococcal vaccine (pneumovax):
Patient indicated that the pneumococcal vaccine was received previously.
Location: East Orange, NJ

Immunizations: **PNEUMO-VAC (Historical)**

Chapter 5: Reminder Reports

Clinical Reminder reports can be used for summary and detailed level information about patients' reminders due and satisfied. Reminder Reports also provide reports that clinical coordinators can use to review data extracted based on reminder definitions.

Patch PXR*1.5*6 Reminder Reports

The patch contains enhancements and fixes to the Reminder Reports menu. New options have been added that allow allocation of report templates (for the Reminders Due report) to individual users. A new report of review dates for reminder package files is also added.

Enhancements

1. Combined report option for multiple facilities (E3R - 15489)
2. Combined report for multiple locations
3. Full SSN can be displayed (E3R – 15490)
4. Options to total summary reports with duplicates suppressed (E3R – 15489)
5. Selection of reminder categories or reminders added (E3R – 15489)
6. Allow allocation of report templates to individual users (E3R – 15492)
7. Option to sort inpatient reports by ward/bed (E3R – 14847)
8. Delimiter separated output format (E3R – 15489)
9. Report of Review Dates

Fixes

1. Mandatory changes for mailman patch XM*117
2. Fix for occasional crashes in long reports.
BRX-1000-12842
TAM-0101-32041
MAC-0201-60752
3. Fix for allocation errors in large team reports.
MAC-0201-60753
DAY-0101-42348
4. Re-release of corrected reminder taxonomy VA-BREAST TUMOR. Duplicate codes are removed.
TAM-0901-30568

Reminder Reports Menu

Syn.	Name	Option Name	Description
D	Reminders Due Report	PXRM REMINDERS DUE	For a selected reminder the report lists any reminders that are currently due.
R	Reminders Due Report (User)	PXRM REMINDERS DUE (USER)	Reminders Due Reports may be run from any report template allocated to this user.
U	User Report Templates	PXRM REPORT TEMPLATE (USER)	This option allows you to modify the PXRM REPORT TEMPLATE (USER) parameter. This parameter defines which reminder report templates are available to a restricted user.
T	Extract EPI Totals	PXRM EXTRACT EPI TOTALS	This option is used to summarize total counts for each type of finding item that was extracted for the target date range of the LREPI extract option run.
L	Extract EPI List by Finding and SSN	PXRM EXTRACT EPI FINDING LIST	This option allows you to print extract results stored in the Reminder Extract Summary file (810.3). Extracted data is listed by finding item and social security number. The finding items are loaded into the Reminder Extract Summary file when one of the following options is run: LREPI ENHANCE MANUAL RUN or LREPI NIGHTLY TASK
V	Report of Review Date	PXRM REVIEW DATES	The Review Date Report may be run for the following files: <ul style="list-style-type: none"> Computed Findings Reminder Definition Reminder Dialogs Reminder Taxonomies A cutoff date may be entered and all review dates prior or equal to that date in the file selected are reported.

Reminders Due Report

For a selected reminder, the report lists any reminders that are *due on the evaluation date selected*. Note: this cannot be a past date. Reports can be created by the following criteria:

- Individual Patient
- Hospital Location (all patients with encounters)
- OE/RR Team (all patients in team)
- PCMM Provider (all practitioner patients)
- PCMM Team (all patients in team)

A summary report displays totals of how many patients of those selected have reminders due or applicable. The summary report may include several reminders.

A detailed report displays patients with reminders due in alphabetical order. The report displays for each patient the date the reminder is due, the date the reminder was last done and next appointment date. The detailed report also (optionally) lists all future appointments. Detailed reports for Location or Provider may also (optionally) be sorted by next appointment date.

The DETAILED report is for one reminder only.

Reports by Hospital Location, Provider or Team print a separate report for each Hospital Location, Provider or Team selected.

The report by Hospital Location for inpatient ward locations allows reporting for either current inpatients or admissions within a selected date range.

Enhancements to Reminders Due Report with PXR*1.5*6

1. Combined Report for Multiple Facilities

If more than one facility is selected, the following prompt is displayed:

```
Select FACILITY: SALT LAKE CITY//                               660
Select another FACILITY: 550 DANVILLE, IL                    550
Select another FACILITY:
Combined report for all facilities : N//Y
```

If a combined report is selected, a single report is printed for all facilities. The locations/clinics with the same name at different facilities are combined. The report also removes any duplicated patients.

2. Combined Report for Multiple Locations

The report by location has been changed. If more than one location, clinic group, or clinic stop is selected, the following prompt is displayed:

```
Determine encounter counts for: HS// <Enter> Selected Hospital Locations

LOCATION: GENERAL MEDICINE          ANDERSON,CURTIS
Select another LOCATION: ONCOLOGY  ANDERSON,CURTIS
Select another LOCATION:

Combined report for all Locations : N//Y
```

If a combined location report is selected, a single report is printed for all selected locations within a facility. Conversely, the reports for all locations may now be split by location. The option to run a combined location report is available in the combined facility report if locations with more than one name are selected. This applies to the Detailed report only. (For the summary report, use totals to combine locations.)

3. Full SSN displayed

On the detailed report, you can choose to display either long or short SSN now.

```
Print full SSN: N// y YES
```

If long SSN is selected but a patient is also an employee, then only the short SSN is displayed. There are two fields in the #800 file that affect this:

- 1) FULL SSN - this is the default for the 'full SSN' prompt in the reports
- 2) TRUNCATE EMPLOYEE SSN - this overrides the full SSN prompt for employees

The TRUNCATE EMPLOYEE SSN field is set to Y by the install of patch 6. You can get full employee SSN by setting the value of the field to N if short SSN is the norm for a site. Patients who are employees (based on patient type #391 or patient eligibility #361 in the PATIENT file) will display the short SSN even if the full SSN display is selected.

The only way to modify this field is via VA FileMan

```
Select OPTION: ENTER OR EDIT FILE ENTRIES

INPUT TO WHAT FILE: CLINICAL REMINDER PARAMETERS
EDIT WHICH FIELD: ALL// TRUNCATE EMPLOYEE SSN
THEN EDIT FIELD: <Enter>

Select CLINICAL REMINDER PARAMETERS ONE: 1
...OK? Yes// <Enter> (Yes)
TRUNCATE EMPLOYEE SSN: YES// <Enter>
```

4. Option to Print Totals

The summary report now allows totals to be printed. The following prompt is displayed after reminder selection:

```
Select one of the following:
  N      Normal report
  R      Report with additional totals
  T      Totals only report
REPORT TOTALS: N// <Enter>
```

At the end of each facility section, a totals page is displayed. Duplicate entries are removed

5. Selection of Reminder Categories

The prior version of reports allowed selection of reminders individually. This version allows selection of reminder categories, individual reminders, or both. The following prompts are displayed:

```
TYPE OF REPORT: S// <Enter> ummary
Select a REMINDER CATEGORY:  DIABETIC REMINDERS
    ...OK? Yes//<Enter>  (Yes)
Select another REMINDER CATEGORY: <Enter>
Select individual REMINDER:  AGETEST REMINDER
```

All reminders in a category are evaluated and due reminders are reported separately in the same format as reminders selected individually. On the summary report, reminders are sorted in name order. The detailed report can only report on one reminder. If a category is selected for a detailed report the report will only include the first reminder in the category.

6. Allocation of Report Templates to Users

A new menu option, PXRMR REPORT TEMPLATES (USER), has been created, to allow allocation of templates to individual users. A new menu option, PXRMR REMINDERS DUE (USER), was created, which allows a user to produce a reminders due report. The user can only run reports from templates allocated to them in the PXRMR REPORT TEMPLATES (USER) option; the new option doesn't allow users to edit or create templates or run reports without a template.

```
Select Reminder Managers Menu Option: RP  Reminder Reports

  D      Reminders Due Report
  R      Reminders Due Report (User)      [PXRMR REMINDERS DUE (USER)]
  U      User Report Templates           [PXRMR REPORT TEMPLATES (USER)]
  T      Extract EPI Totals
  L      Extract EPI List by Finding and SSN
  V      Review Date Report
```

7. Option to Sort Inpatient Reports by Ward/Bed

If a detailed inpatient report is run, the following prompts are displayed:

```
TYPE OF REPORT: S// D Detailed
Display All Future Appointments: N// <Enter>O
Sort by Inpatient Location/Bed: N//Y
```

If the sort by location/bed option is selected, the report will display the patients in ward/bed order. Note that the default is to display patients in name order, showing the Next Appt. column in place of the Ward/Bed column.

Example:

```
                Clinical Reminders Due Report - Detailed Report
Facility: TAMPA, FL 673
Reminders due 6/28/2001 - 7N for CURRENT INPATIENTS
report -Pneumovax Due: 4 patients have reminder due

                Date Due      Last Done      Ward/Bed
                -----      -
1      KXXXXX,DXXXX (XXX-XX-XXXX)      DUE NOW      N/A      A - 1
2      MXXXXXX,FRANK JR (XXX-XX-XXXX)      DUE NOW      N/A      A - 2
3      PXXXXXX,BART A (XXX-XX-XXXX)      DUE NOW      N/A      A - 3
4      WXXXXXXXXX,LOUIS (XXX-XXXXXX)      DUE NOW      N/A      Unspecified

Report run on 19 patients.
Applicable to 16 patients.

End of the report.
```

8. Delimiter Separated Output Format

This new reports feature allows you to create condensed reports for import into spreadsheet tables. Headings are suppressed. The option allows a delimiter character to be specified (similar to the EXCEL option Data/Get External Data/Import Text):

```
Print Delimiter Separated output only: N// y YES
  Select one of the following:
    C      Comma
    M      Semicolon
    S      Space
    T      Tab
    U      Up arrow
Specify REPORT DELIMITER CHARACTER: U//<Enter> p arrow
DEVICE: HOME// <Enter> ANYWHERE   Right Margin: 80// <Enter>

TITLE:COMBINED REPORT TEMPLAT^TEMPLATE:ELY/SLC/ISC ADVA
START:12/26/2000^END:12/21/2001^RUN:12/21/2001 12:12:59 pm
^^INDIVIDUAL LOCATIONS ONLY

0^ISC-SLC-A4  6023_CARDIOLOGY^^
1^Enter pain score vitals/measurement^0^0^CARDIOLOGY
2^Advanced Directives Education^46^41^CARDIOLOGY
3^Pain Assessment^0^0^CARDIOLOGY
0^PATIENTS^47^^CARDIOLOGY

0^ISC-SLC-A4  6023_DIABETIC EDUCATION-INDIV-MOD B^^
1^Enter pain score vitals/measurement^0^0^DIABETIC EDUCATION-INDIV-MOD B
2^Advanced Directives Education^21^19^DIABETIC EDUCATION-INDIV-MOD B
3^Pain Assessment^0^0^DIABETIC EDUCATION-INDIV-MOD B
0^PATIENTS^21^^DIABETIC EDUCATION-INDIV-MOD B

0^ISC-SLC-A4  6023_GENERAL MEDICINE^^
1^Enter pain score vitals/measurement^0^0^GENERAL MEDICINE
2^Advanced Directives Education^26^23^GENERAL MEDICINE
3^Pain Assessment^0^0^GENERAL MEDICINE
0^PATIENTS^26^^GENERAL MEDICINE

End of the report. Press ENTER/RETURN to continue...
```

The above example is a summary report with totals for two individual OE/RR teams. Report headings are suppressed, but for each section of the report, there are 0 prefixed records indicating the team name and the total patients. On the detailed report, the applicable total is also included.

9. Report of Review Dates

A new report option, PXRMR REVIEW DATES, has been added to the reports menu. This allows review dates up to and including a selected cutoff date to be reported for the reminder package files.

```
Select Reminder Managers Menu Option: RP Reminder Reports

  D      Reminders Due Report
  R      Reminders Due Report (User)
  U      User Report Templates
  T      Extract EPI Totals
  L      Extract EPI List by Finding and SSN
  V      Review Date Report                                [PXRMR REVIEW DATES]

Select Reminder Reports Option: V Review Date Report

  Select one of the following:

      C      Computed Finding
      D      Reminder Dialog
      R      Reminder Definition
      T      Reminder Taxonomy

Select File to Review: R// <Enter> eminder Definition

Enter Review Cutoff Date: Jun 28, 2001//JUN 30, 2001
DEVICE: <Enter> ANYWHERE      Right Margin: 80//<Enter>

REMINDERS TO REVIEW (up to Jun 30, 2001)      JUN 28,2001  14:21      PAGE 1
NAME                                             REVIEW DATE
-----
JG DIABETIC EYE EXAM                          MAY  3,2000
SLC CANCER SCREEN                             MAY  1,2001
TEST EXCHANGE CHANGES                        MAY  2,2001
TEST EXCHANGE (NEW)                           MAY  2,2001
JG-CHOLESTEROL SCREEN (F)                    JUN 12,2001
```

Examples of Reminders Due Report

Summary Report by PCMM Provider

The total number of reminders due for patients allocated to a provider within PCMM can be reported. Note that the summary report may be run for several reminders, the detailed report only for one. *A future date may be entered if a report of reminders becoming due is required.* Today is the default date.

```
Select Reminder Reports Option: D Reminders Due Report
Select an existing REPORT TEMPLATE or return to continue: <Enter>
  Select one of the following:
    I      Individual Patient
    L      Location
    O      OE/RR Team
    P      PCMM Provider
    T      PCMM Team
PATIENT SAMPLE: L// PCMM Provider

Select PROVIDER: DEAN, TAN          TD
Select another PROVIDER:
  Select one of the following:
    P      Primary care assigned patients only
    A      All patients on list

PRIMARY CARE ONLY OR ALL: P// All patients on list
Enter EFFECTIVE DUE DATE: JAN 20, 2000//<Enter>  (JAN 20, 2000)
  Select one of the following:
    D      Detailed
    S      Summary
TYPE OF REPORT: S// Summary

Select a REMINDER CATEGORY: WOMEN'S HEALTH
  REMINDER CATEGORY: WOMEN'S HEALTH// <Enter>
  DISPLAY ORDER: 1//<Enter>
Select another REMINDER CATEGORY: <Enter>

Select REMINDER: MAMMOGRAM
```

Summary Report by PCMM Provider, cont'd

```

Select another REMINDER: VA-BLOOD PRESSURE CHECK
Select another REMINDER: <Enter>
Create a new report template: N// <Enter>
Print Delimiter Separated output only: N// 0

DEVICE: HOME// <Enter> ALPHA

Evaluating reminders done

```

```

Jan 20, 2000 5:09:08 pm Page 1

Clinical Reminders Due Report - Summary Report
Report Criteria:
Patient Sample: PCMM Provider
PCMM Provider: DEAN,TAN
All/Primary: All patients on list
Effective Due Date : 1/20/2000
Date run: 1/20/2000 5:06:54 pm

```

```

Enter RETURN to continue or '^' to exit:

Jan 20, 2000 5:09:11 pm Page 2

Clinical Reminders Due Report - Summary Report for 1/20/2000
# Patients with Reminders
Applicable Due
-----
1 Mammogram 0 0
2 Weight 8 6
3 Blood Pressure Check 8 7

Report run on 8 patients.

End of the report. Press ENTER/RETURN to continue...

```

The column Reminder Applicable excludes patients (e.g. dead or non-diabetic) for whom the selected reminders are not required. Excluded patients are included in the Report Run on total.

Detailed report by PCMM Provider (Next Appointment only)

This option reports details of patients with reminders due for patients allocated to a provider within PCMM. This example report displays only the next appointment for each patient. The option to display all future appointments for the patient is explained in the example report (c) Individual Patients.

```
Select Reminder Reports Option: D Reminders Due Report

Select an existing REPORT TEMPLATE or return to continue: <Enter>
  Select one of the following:
    I      Individual Patient
    L      Location
    O      OE/RR Team
    P      PCMM Provider
    T      PCMM Team
PATIENT SAMPLE: L// PCMM Provider

Select PROVIDER:   DEAN,TAN      TD
Select another PROVIDER:

  Select one of the following:
    P      Primary care assigned patients only
    A      All patients on list

PRIMARY CARE ONLY OR ALL: P// All patients on list
Enter EFFECTIVE DUE DATE: Jan 20, 2000// <Enter> (JAN 20, 2000)

  Select one of the following:
    D      Detailed
    S      Summary
TYPE OF REPORT: S// Detailed

Display All Future Appointments: N//<Enter> 0

Print full SSN: N// NO

Sort by Next Appointment date: N//<Enter> 0

Select REMINDER:VA-BLOOD PRESSURE CHECK

Create a new report template: N//<Enter> 0

Print Delimiter Separated output only: N// 0

DEVICE: HOME// <Enter> ANYWHERE      Right Margin: 80//

Evaluating reminders done
```

Detailed Report by Provider, cont'd

Jan 20, 2000 5:17:29 pm Page 1

Clinical Reminders Due Report - Detailed Report

Report Criteria:

Patient Sample: PCMM Provider
PCMM Provider: DEAN,TAN
Reminder: VA-BLOOD PRESSURE CHECK
Appointments: Next Appointment only
All/Primary: All patients on list
Effective Due Date : 1/20/2000
Date run: 1/20/2000 5:16:32 pm

Enter RETURN to continue or '^' to exit:

Jan 20, 2000 5:17:32 pm Page 2

Clinical Reminders Due Report - Detailed Report for 1/20/2000

Blood Pressure Check: 7 patients have reminder due

		Date Due	Last Done	Next Appt
		-----	-----	-----
1	DINARO,MUCHO (3779)	8/28/1998	8/27/1998	None
2	ESSTEPON,GLORD (3234)	1/20/2000	N/A	None
3	HOLMES,SHERLOCK (5377)	1/20/2000	N/A	None
4	HOOD,ROBIN (2591P)	8/19/1999	8/18/1999	None
5	MARLEY,JACOB (5678)	9/4/1998	9/3/1998	None
6	TEST,KEVIN (5734)	2/3/1999	2/3/1997	None
7	TRAT,JACK (2342)	1/20/2000	N/A	None

Report run on 8 patients.
Applicable to 8 patients.

End of the report. Press ENTER/RETURN to continue...

Detailed Report by Individual Patient (All Future Appointments)

All future appointments for each patient can be reported on the detailed report. This example is of a detailed report for Individual Patients.

```

                                Jan 20, 2000 5:00:40 pm Page 2

                    Clinical Reminders Due Report - Detailed Report for 1/20/2000

Weight:  2 patients have reminder due

                                Date Due      Last Done      Next Appt
                                -----      -
1      ESSTEPON, GLORD (3234)      1/20/2000      N/A            None
2      TEST, KEVIN (5734)          2/3/1999       2/3/1997       None

Report run on 8 patients.
Applicable to 8 patients.

End of the report. Press ENTER/RETURN to continue...

```

Summary Report by Location

The report by hospital Location evaluates reminders due for patients attending the selected hospital Location within a range of dates. If a prior date range is selected, then all patients with encounters are selected. If a future date range is selected, then patients with appointments for the location are selected.

The reports for *selected* hospital locations list reminders due for each location separately. The report for *all* locations reports reminders due for all locations combined.

Hospital Location, Clinic Group or Clinic Stop code can be selected.

Reminders *due on the effective due date* are reported.

```
Select Reminder Reports Option: D Reminders Due Report
Select an existing REPORT TEMPLATE or return to continue: <Enter>
  Select one of the following:
    I      Individual Patient
    L      Location
    O      OE/RR Team
    P      PCMM Provider
    T      PCMM Team
PATIENT SAMPLE: L// <Enter> Location
Select FACILITY: SALT LAKE CITY// <Enter>                660
Select another FACILITY: 660GC
Select another FACILITY: <Enter>
Combined report for all facilities : N//<Enter> YES
  Select one of the following:
    HA     All Outpatient Locations
    HAI    All Inpatient Locations
    HS     Selected Hospital Locations
    CA     All Clinic Stops (with encounters)
    CS     Selected Clinic Stops
    GS     Selected Clinic Groups
Determine encounter counts for: HS// HA All Outpatient Locations
  Select one of the following:
    P      Previous Encounters
    F      Future Appointments
```

Summary Report by Location, cont'd

PREVIOUS ENCOUNTERS OR FUTURE APPOINTMENTS: P//<Enter> revious Encounters

Enter ENCOUNTER BEGINNING DATE: **T-360** (DEC 18, 2000)

Enter ENCOUNTER ENDING DATE: **T** (DEC 18, 2001)

Enter EFFECTIVE DUE DATE: Aug 01, 2001// <Enter> (AUG 01, 2001)

Select SERVICE CATEGORIES: AI// <Enter>

Select one of the following:

D Detailed

S Summary

TYPE OF REPORT: S// <Enter> ummary

Select a REMINDER CATEGORY: **Pain Management Reminder Dialogs**

...OK? Yes// <Enter> (Yes)

Select another REMINDER CATEGORY: **Pain Management Category**

Select another REMINDER CATEGORY: <Enter>

Select individual REMINDER: **PAIN ASSESSMENT** LOCAL

Select another REMINDER: **A A SG PAIN HISTORY** LOCAL

Select another REMINDER: **A A SG PAIN ASSESSMENT** LOCAL

Select another REMINDER: **A A SG PAIN SCREENING** LOCAL

Select another REMINDER: <Enter>

Create a new report template: N//<Enter> **O**

Combined report for all Facilities : N// YES

Enter ENCOUNTER BEGINNING DATE: **T-365** (DEC 18, 2000)

Enter ENCOUNTER ENDING DATE: **T** (DEC 18, 2001)

Enter EFFECTIVE DUE DATE: Dec 06, 2001// (DEC 06, 2001)

Print Delimiter Separated output only: N// **O**

DEVICE: HOME// <Enter> ANYWHERE Right Margin: 80// <Enter>

Sorting Encounters \

Evaluating Reminders done

Summary Report by Location, cont'd

Dec 18, 2001 2:17:17 pm Page 1

Clinical Reminders Due Report - Summary Report

Report Criteria:

Patient Sample: Location
Location: All Outpatient Locations (Prior Encounters)
Reminder Category: Pain Management Reminder Dialogs
RM Pain Management Category
Individual Reminder: PAIN ASSESSMENT
A A SG PAIN HISTORY
A A SG PAIN ASSESSMENT
A A SG PAIN SCREENING
Date Range: 12/6/2000 to 12/6/2001
Effective Due Date : 12/6/2001
Date run: 12/6/2001 2:12:28 pm
Combined report: Individual locations plus Overall Total
Summary report: All outpatient locations
Service categories: AI
A - AMBULATORY
I - IN HOSPITAL

Enter RETURN to continue or '^' to exit:

Dec 18, 2001 2:17:23 pm Page 2

Clinical Reminders Due Report - Summary Report

Combined Report: SALT LAKE CITY (660), SALT LAKE OIFO (5000)

Reminders due 12/18/2001 - All Locations for 12/18/2000 to 12/18/2001

	# Patients with Reminders	
	Applicable	Due
	-----	---
1 Pain Assessment	1	1
2 PAIN HISTORY	0	0
3 PAIN ASSESSMENT	8	8
4 PAIN SCREENING**	8	2

Report run on 4 patients.

End of the report. Press ENTER/RETURN to continue...

Reminder Report Templates

The selection criteria used for a Reminders Due report may be saved into a report template file (with a user-specified identifier) as the report is being run. When running the Reminders Due report, you may select from existing templates and run a new report using the parameters from the selected template. The prompts for date range and sort order are displayed, but all other parameters are taken from the previous report. If a print template is selected, you are prompted (before running the report) to edit the template and/or to copy to a new template.

Creating a new template

This is an example of creating a new template for the Reminders Due report:

```
Select Reminder Reports Option: D Reminders Due Report
Select an existing REPORT TEMPLATE or return to continue: <Enter>
  Select one of the following:
    I      Individual Patient
    L      Location
    O      OE/RR Team
    P      PCMM Provider
    T      PCMM Team

PATIENT SAMPLE: L// PCMM Provider
Select PROVIDER: GO,JO  jg
Select PROVIDER: MALMROSE, CARY  cm
Select another PROVIDER: <Enter>

  Select one of the following:
    P      Primary care assigned patients only
    A      All patients on list

PRIMARY CARE ONLY OR ALL: P// All patients on list

Enter EFFECTIVE DUE DATE: Dec 18, 2001// <Enter>  (DEC 18, 2001)

  Select one of the following:
    D      Detailed
    S      Summary

TYPE OF REPORT: S// <Enter> ummary

Select a REMINDER CATEGORY: JG REPORTS
...OK? Yes// <Enter>  (Yes)
```

Select another REMINDER CATEGORY: <Enter>

Select individual REMINDER: **PAIN**

- 1 PAIN ASSESSMENT LOCAL
- 2 PAIN HISTORY LOCAL
- 3 PAIN ASSESSMENT A A SG PAIN ASSESSMENT LOCAL
- 4 PAIN SCREENING VA-PAIN SCREENING LOCAL

CHOOSE 1-4: **4** VA-PAIN SCREENING LOCAL

Select another REMINDER: **PAIN ASSESSMENT**

- 1 PAIN ASSESSMENT LOCAL
- 2 PAIN ASSESSMENT A A SG PAIN ASSESSMENT LOCAL

CHOOSE 1-2: **2** A A SG PAIN ASSESSMENT LOCAL

Create a new report template: N// **YES**

STORE REPORT LOGIC IN TEMPLATE NAME: **JG PAIN REPORTS**

Are you adding 'JG PAIN REPORTS' as
a new REMINDER REPORT TEMPLATE (the 48TH)? No// **Y** (Yes)

REMINDER REPORT TEMPLATE TITLE: **Dr. Go's Pain Reports**

Changes to template 'JG PAIN REPORTS' have been saved

Enter EFFECTIVE DUE DATE: Dec 18, 2001// (DEC 18, 2001)

Select one of the following:

- I Individual Providers only
- R Individual Providers plus Totals by Facility
- T Totals by Facility only

REPORT TOTALS: I// R Individual Providers plus Totals by Facility

Print Delimiter Separated output only: N// <Enter>0

DEVICE: HOME//<Enter> ANYWHERE Right Margin: 80// <Enter>

Done

Evaluating reminders |

Clinical Reminders Due Report - Summary Report

Report Criteria:

Report Title: Dr. Go's Pain Reports
 Patient Sample: PCMM Provider
 PCMM Provider: GREEN,JOANN
 MALMROSE,CARY
 Reminder Category: JG REPORTS
 Individual Reminder: VA-PAIN SCREENING
 A A SG PAIN ASSESSMENT
 All/Primary: All patients on list
 Effective Due Date: 12/18/2001
 Date run: 12/18/2001 11:11:16 am
 Template Name: JG PAIN REPORTS
 Summary report: Individual Providers plus Totals by Facility

Enter RETURN to continue or '^' to exit:

Clinical Reminders Due Report - Summary Report

Reminders due for MALMROSE,CARY for 12/18/2001

		# Patients with Reminders	
		Applicable	Due
		-----	---
1	MST Screening	5	2
2	Breast Cancer Screen	1	1
3	Breast Cancer Screen	1	1
4	Mammogram	1	1
5	ITC 2001 Mammogram Example	1	1
6	MST Screening (Exams)	5	2
7	Enter pain score vitals/measurement	0	0
8	PAIN SCREENING	4	4
9	IHD Lipid Profile	1	0
10	Hypertension Screen	5	1
11	IHD Elevated LDL	0	0
12	Anticoagulant use-CHF and A-FIB	0	0
13	NUR ALCOHOL USE SCREEN (CAGE)	5	5
14	NUR SEATBELT AND ACCIDENT AVOIDANCE	5	5

Enter RETURN to continue or '^' to exit:

Clinical Reminders Due Report - Summary Report

Reminders due for MALMROSE,CARY for 12/18/2001

		# Patients with Reminders	
		Applicable	Due
		-----	---
15	Unvested Patients	5	0
16	PAIN ASSESSMENT	5	5

Report run on 5 patients.

Enter RETURN to continue or '^' to exit:

Clinical Reminders Due Report - Summary Report

TOTAL REPORT for 12/18/2001

		# Patients with Reminders	
		Applicable	Due
		-----	---
1	MST Screening	5	2
2	Breast Cancer Screen	1	1
3	Breast Cancer Screen	1	1
4	Mammogram	1	1
5	ITC 2001 Mammogram Example	1	1
6	MST Screening (Exams)	5	2
7	Enter pain score vitals/measurement	0	0
8	PAIN SCREENING	4	4
9	IHD Lipid Profile	1	0
10	Hypertension Screen	5	1
11	IHD Elevated LDL	0	0
12	Anticoagulant use-CHF and A-FIB	0	0
13	NUR ALCOHOL USE SCREEN (CAGE)	5	5
14	NUR SEATBELT AND ACCIDENT AVOIDANCE	5	5

Enter RETURN to continue or '^' to exit:

Clinical Reminders Due Report - Summary Report

TOTAL REPORT for 12/18/2001

		# Patients with Reminders	
		Applicable	Due
		-----	---
15	Unvested Patients	5	0
16	PAIN ASSESSMENT	5	5

Report run on 5 patients.

Using an Existing Template

This is an example of using an existing template for the Reminders Due report:

```
Reminders Due Report
Select an existing REPORT TEMPLATE or return to continue: pROV/DEAN Due Patients
for DEAN
      Report Title:      Due Patients for DEAN
      Report Type:      Detailed Report
      Patient Sample:   PCMM Provider
      PCMM Provider:    DEAB,TAN
      Reminder:        VA-SEAT BELT EDUCATION
      All/Primary:     All patients on list
      Template Name:   PROVDEAN
      Date last run:   MAR 22, 1999@11:44:01
WANT TO EDIT 'PROVDEAN' TEMPLATE: N//<Enter> O
Enter DUE EFFECTIVE DATE: Feb 1, 2001// <Enter> (FEB 1, 2001)
DEVICE: HOME// <Enter> ALPHA

Evaluating reminders done
```

Editing/Copying an Existing Template

This is an example of editing an existing template. Here an additional reminder is added to the report and the report is made into a summary report:

```
WANT TO EDIT 'PROVDEAN' TEMPLATE: N// YES
TEMPLATE NAME: PROVDEAN// <Enter>
TITLE: Due Patients for DEAN//<Enter>
PATIENT SAMPLE: Provider// <Enter>
REPORT TYPE: Detailed Report//Summary Report
Select PROVIDER: DEAN,TAN// <Enter>
PRIMARY CARE ONLY OR ALL: All patients// <Enter>
Select REMINDER CATEGORY: <Enter>
Select REMINDER: VA-SEAT BELT EDUCATION// VA-WEIGHT
  DISPLAY ORDER: 2
Select REMINDER:
      Report Title:      Due Patients for DEAN
      Report Type:      Summary Report
      Patient Sample:   PCMM Provider
      PCMM Provider:    DEAN,TAN
      Reminder:         VA-SEAT BELT EDUCATION
                       VA-WEIGHT
      All/Primary:      All patients on list
      Template Name:    PROVDEAN
      Date last run:    MAR 22, 1999@11:44:01

STORE REPORT LOGIC IN TEMPLATE NAME:  PROVDEAN// DEANSUM
A new template DEANSUM has been created
```

Note that when new reminders are added, it is possible to select the display order. Changes made are re-displayed before filing. The changes may be saved to the existing template (by pressing <Enter>) or copied to a new template name (with a new template title as above).

Allocation of Report Templates to Users

A new menu option PXRMR REMINDERS DUE (USER) was created that allows a user to produce a reminders due report. Another option, PXRMR REPORT TEMPLATES (USER), was created to allow allocation of templates to individual users. Users can only run reports from templates allocated to them in the PXRMR REPORT TEMPLATES (USER).

NOTE: The new option doesn't allow users to edit or create templates. Users may not run reports without a template.

The new options are on the Reminder Reports menu:

```
Select Reminder Managers Menu Option: RP  Reminder Reports
  D      Reminders Due Report
  R      Reminders Due Report (User)          [PXRMR REMINDERS DUE (USER)]
  U      User Report Templates                [PXRMR REPORT TEMPLATES (USER)]
  T      Extract EPI Totals
  L      Extract EPI List by Finding and SSN
  V      Review Date Report
```

Reminders Due Report (User) [PXRMR REMINDERS DUE (USER)]

Reminders Due Reports may be run from any report template allocated to a user.

The User Report Templates option allows you to define which reminder report templates are available to a restricted user.

```
Select Reminder Reports Option: r  Reminders Due Report (User)

Select REPORT TEMPLATE: roscoe      ROSCOE
...OK? Yes// <Enter>  (Yes)

Report Title:      ROSCOE
Report Type:       Detailed Report
Patient Sample:    Individual Patients
Individual Patients: ANDERSON,H C
                   BUFFET,PHOEBE
Reminder:          1  SLC CANCER SCREEN
Template Name:     roscoe
Date last run:     FEB 03, 2000@06:34:46

Enter EFFECTIVE DUE DATE: Aug 01, 2001//  (AUG 01, 2001)
Display All Future Appointments: N// y  YES
DEVICE: HOME//    ANYWHERE    Right Margin: 80//
Evaluating reminders done
```



```
Sequence: 1// <Enter> 1
Reminder Report Template: ?
Answer with REMINDER REPORT TEMPLATE NAME
Do you want the entire 33-Entry REMINDER REPORT TEMPLATE List? Y (Yes)
Choose from:
AGE TEST          SATISFIED REPORT
WEIGHT           DEFA/WEIGHT
jgtest           HEP C
pain1           pain 1 report
roscoe          ROSCOE
Reminder Report Template: jgtest          HEP C
...OK? Yes// <Enter> (Yes)

Select Sequence: 2
Are you adding 2 as a new Sequence? Yes// <Enter> YES

Sequence: 2// <Enter> 2
Reminder Report Template: pain1          pain 1 report
...OK? Yes// (Yes)

Select Sequence: <Enter>

Select Reminder Reports Option: <Enter>
```

Extract EPI Totals

This option is used to summarize total counts for each type of finding item that was extracted for the target date range of the LREPI extract option run. The Lab EPI extract name follows the convention: LREPI YY/MM MMDDYY, where the YY/MM is the year and month from the date range specified by the LREPI extract option that created the extract. MMDDYY is the month, day and year that the extract was run. The prefix of LREPI identifies the extract as the result of LREPI extract options (manual or automatic run for the LREPI Lab Search/Extract Protocol).

At the START WITH NAME prompt, enter "LREPI YY/MM", with the year and month's data to be reported. At the GO TO NAME prompt, enter LREPI YY/MMz. If there have been multiple runs for the target month, you can narrow the report criteria by adding the MMDDYY (month, day, year the report was run) to the START WITH NAME and GO TO NAME.

```
Select Reminder Reports Option: T Extract EPI Totals
START WITH NAME: FIRST// LREPI 00/05
GO TO NAME: LAST// LREPI 00/05z
DEVICE: ANYWHERE Right Margin: 80//
```

```
REMINDER EPI EXTRACT TOTALS AUG 1,2000 00:31 PAGE 1
-----
```

```
LREPI 00/05 061600 Extract Date Range: MAY 1,2000-MAY 31,2000
Extract Date: JUN 16,2000 01:34
```

```
Total Patients Evaluated: 78
Total Patients with Findings: 51
```

Totals by Finding Item	Finding Count	Unique Patient Count
INTERFERON BETA-1A (AVONEX) 30	3	2
RIBAVIRIN/INTERFERON 1200/3 PE	5	3
RIBAVIRIN/INTERFERON 600/3 PEN	1	1
RIBAVIRIN/INTERFERON 1000/3 PE	2	2
RIBAVIRIN 200MG CAP (VA 44-4-0	1	1
INTERFERON ALPHA-2B INJ (VA 44	1	1
HEP C ANTIBODY	30	30
TOT. BILIRUBIN	21	21
AST	33	33
ALT	33	33
VA-HEPATITIS C INFECTION	18	18

Extract EPI List by Finding and SSN

This option allows you to print extract results stored in the Reminder Extract Summary file (810.3). Extracted data is listed by finding item and social security number. The finding items are loaded into the Reminder Extract Summary file when one of the following options is run:

LREPI ENHANCE MANUAL RUN Lab Search/Extract Manual Run (Enhanced)

LREPI NIGHTLY TASK Lab Search/Extract Nightly Task

```
Select Reminder Reports Option: L Extract EPI List by Finding and SSN
START WITH NAME: FIRST// LREPI 00/05
GO TO NAME: LAST// LREPI 00/05z
DEVICE: ANYWHERE Right Margin: 80//
```

```
LREPI 00/05 062300 Date Range: MAY 1,2000 TO MAY 31,2000
Extract Date: JUL 23,2000 16:12
```

```
Total Patients Evaluated: 374
Patients with Findings : 339
```

Finding	SSN	Patient	Enctr Type	Date
ALT	145-59-4281	HLUKXRU,LYSEXYN	Outpatient	5/12/00
	155-55-2063	HLNYHT,CLZHT JL	Outpatient	5/24/00
	182-39-1314	HLCIHUL,AHXYLUI	Outpatient	5/15/00
	184-68-9784	TEXZWXY,AHTADH	Outpatient	5/13/00
	202-17-5419	HLLAAHU,JELUAHT	Outpatient	5/22/00
	203-07-7909	LLJHN,HIPLUI	Outpatient	5/11/99
	203-27-2835	KLAHAA,TLZRHA C	Outpatient	5/23/00
	203-59-7487	YXRYF,FHYH L	Outpatient	5/30/00
	203-69-0200	WHLQHU,JHJDA	Outpatient	4/12/00
	204-37-2492	WHAJE,PLASHU	Outpatient	5/21/00
	204-68-3181	PUXWEHSS,TXA U	Outpatient	5/8/00
	204-68-4002	DDYBHALBHU,TRH	Outpatient	5/4/00
	204-86-6120	DXYLERH,SEXZLT	Outpatient	5/19/00
	204-87-2592	HHLSHU,ALYDH CX	Outpatient	5/31/00
	204-97-5515	MJFULP,PLASHU U	Outpatient	3/25/98
	205-28-3620	MLJB,LYSEXYN U	Outpatient	5/1/00
	205-28-4747	BRYFHU,UXKHUS C	Outpatient	1/28/00
	205-37-3844	LLBH,YLSELYDHA	Outpatient	5/4/00
	205-49-8892	DDQX,SEXZLT C	Outpatient	12/29/99
	205-57-8086	ITXZH,PDAADLZ G	Outpatient	5/26/00
	205-89-9389	DHQLRFY,JALUHY	Outpatient	5/20/00
	205-89-9841	WLFYHU,UXKHUS	Outpatient	5/23/00

etc.

Report of Review Dates

A new report option, PXRMR REVIEW DATES, has been added to the reports menu. This allows review dates up to and including a selected cutoff date to be reported for the reminder package files. You can create review date reports for Computed Findings, Reminder Dialogs, Reminder Definitions, or Reminder Taxonomies.

Select Reminder Managers Menu Option: **RP** Reminder Reports

D	Reminders Due Report	
R	Reminders Due Report (User)	
U	User Report Templates	
T	Extract EPI Totals	
L	Extract EPI List by Finding and SSN	
V	Review Date Report	[PXRMR REVIEW DATES]

Select Reminder Reports Option: **V** Review Date Report

Select one of the following:

C	Computed Finding
D	Reminder Dialog
R	Reminder Definition
T	Reminder Taxonomy

Select File to Review: **R**// eminder Definition

Enter Review Cutoff Date: Jun 28, 2001//**JUN 30, 2001**

DEVICE: ANYWHERE Right Margin: 80//

REMINDERS TO REVIEW (up to Jun 30, 2001) JUN 28,2001 14:21 PAGE 1
NAME REVIEW DATE

JG DIABETIC EYE EXAM	MAY 3,2000
SLC CANCER SCREEN	MAY 1,2001
TEST EXCHANGE CHANGES	MAY 2,2001
TEST EXCHANGE (NEW)	MAY 2,2001
JG-CHOLESTEROL SCREEN (F)	JUN 12,2001

Chapter 6: Reminder Exchange Utility

The Clinical Reminders Exchange Utility provides a mechanism for sharing reminder definitions and dialogs among sites throughout the VA or among sites within a VISN. Exchanging reminders helps to simplify reminder and dialog creation. It also helps to promote standardization of reminders based on local, VISN-wide, and national guidelines.

An effective way to use the Exchange Utility is through VISN web sites. With the Exchange Utility, you can put a set of “packed reminders” into a host file, and the host file can be posted on a web site for download. Once the host file is on the site’s system, the Exchange Utility can load the host file into the site’s Exchange File (#811.8). After the host file is loaded into the Exchange File, the packed reminders can be installed.

Overview Of New Reminder Exchange

Reminder Exchange allows the exchange of clinical reminders and reminder dialogs

- From test account to production
- Between sites
- Within VISN’s
- National Reminders

Terminology

Exchange File (#811.8): Stores entries of packed reminders and dialogs with their components

Think of it as a “ZIP” file that contains:

- All Reminder information
- All Dialog information

The default file extension is .PRD (Packed Reminder Definition).

Packed reminders can be exchanged through VistA MailMan or as a HOST file.

VistA MailMan

MailMan allows users to send the packed reminder via a VistA mail message. When sites are collaborating on development of new reminders and dialogs, messages may be sent between sites for loading into the Clinical Reminders Exchange File (#811.8).

HOST file

Often the domains for MailMan transmission for test accounts are closed. In this case, a host file is used to transport the packed reminders. When a host file is created, it is initially stored on the Mumps server. (Host file is the terminology used in Kernel.) Typically, you would generate a host

file for use on a web site. The Host File will have to be moved from the Mumps server to the web server. Once it is on the web server, it can be downloaded using a web browser. This will initially put it on your PC. Then it will have to be moved from the PC to the Mumps server, at which point it can be loaded into the Exchange File (#811.8).

Technical Overview

In the new reminder exchange utility, reminder definitions are first packed into the Exchange File (#811.8) in XML format. Host file or MailMan messages can then be created from the Exchange File for distribution to other sites. Each host file or MailMan message may contain several packed reminders. When the receiving site loads a host file or MailMan message into its Exchange File, all the packed reminders in the host file or MailMan message are put into the Exchange File. Different versions of the same packed reminder may be stored in the Exchange File. They are differentiated by the Date Packed.

All the components used in the reminder definition and dialog are included. Whenever an installation is done, a history of the installation details is retained in the Exchange File.

Reminder dialogs are installed with the disabled field set to “DISABLED IN REMINDER EXCHANGE.” (When you edit the dialog, one of the fields is DISABLE. If this field contains any text, then the dialog is disabled. To enable it, delete the text.)

NOTE: Changes to Reminder Exchange made in Patch 7:

If local findings have been mapped to terms or dialogs, the local finding mappings are retained when a new version of the term or dialog is loaded into the system. This applies to both reminders loaded as a patch and reminders loaded from mail messages.

Reminder terms retain the existing mappings and add any new findings imported on the term. Dialog components retain the existing mappings and ignore the incoming mappings.

You will no longer get a MailMan message telling you that a term or a dialog was skipped during the patch install.

Steps to Use Reminder Exchange

Summary of Steps

Detailed steps are provided in the following pages.

Export Steps

Step	Action
1. Decide which reminder to pack	LR – List Reminder Descriptions and RI – Reminder Inquiry
2. Put the reminder into the Exchange File – this packs it	CFE – Create File Entry
3. Export the reminder(s)	CHF – Create Host File or CMM – Create MailMan Message

Import Steps

Step	Action
1. Import the reminder(s) into your Exchange File	LHF – Load Host File or LMM – Load MailMan Message
2. Install the reminder	IFE – Install File Entry
3. Review what you have done	IH – Installation History
4. Remove entries from your Exchange File when they are no longer needed	DFE – Delete File Entry

Reminder Exchange Main Screen [PXRM REMINDER EXCHANGE]

When you select Reminder Exchange from the Reminder Managers Menu, the Clinical Reminder Exchange main screen opens, which contains a list of current Exchange File entries in your system (if any) and all the options (actions) to create and delete Exchange File entries, to load them into host files and MailMan messages for export, and to import packed reminders from incoming host files and MailMan messages.

List Reminder Definitions and Reminder Definition Inquiry are also included so that you can review reminders before loading them into the Exchange File.

```
Reminder Managers Menu [PXRM MANAGERS MENU]

CF    Reminder Computed Finding Management ... [PXRM CF MANAGEMENT]
RM    Reminder Definition Management ... [PXRM REMINDER MANAGEMENT]
SM    Reminder Sponsor Management ... [PXRM SPONSOR MANAGEMENT]
TXM   Reminder Taxonomy Management ... [PXRM TAXONOMY MANAGEMENT]
TRM   Reminder Term Management ... [PXRM TERM MANAGEMENT]
RX    Reminder Exchange [PXRM REMINDER EXCHANGE]
RT    Reminder Test [PXRM REMINDER TEST]
OS    Other Supporting Menus ... [PXRM OTHER SUPPORTING MENUS]
INFO  Reminder Information Only Menu ... [PXRM INFO ONLY]
DM    Reminder Dialog Management ... [PXRM DIALOG MANAGEMENT]
CP    CPRS Reminder Configuration ... [PXRM CPRS CONFIGURATION]
RP    Reminder Reports ... [PXRM REMINDER REPORTS]

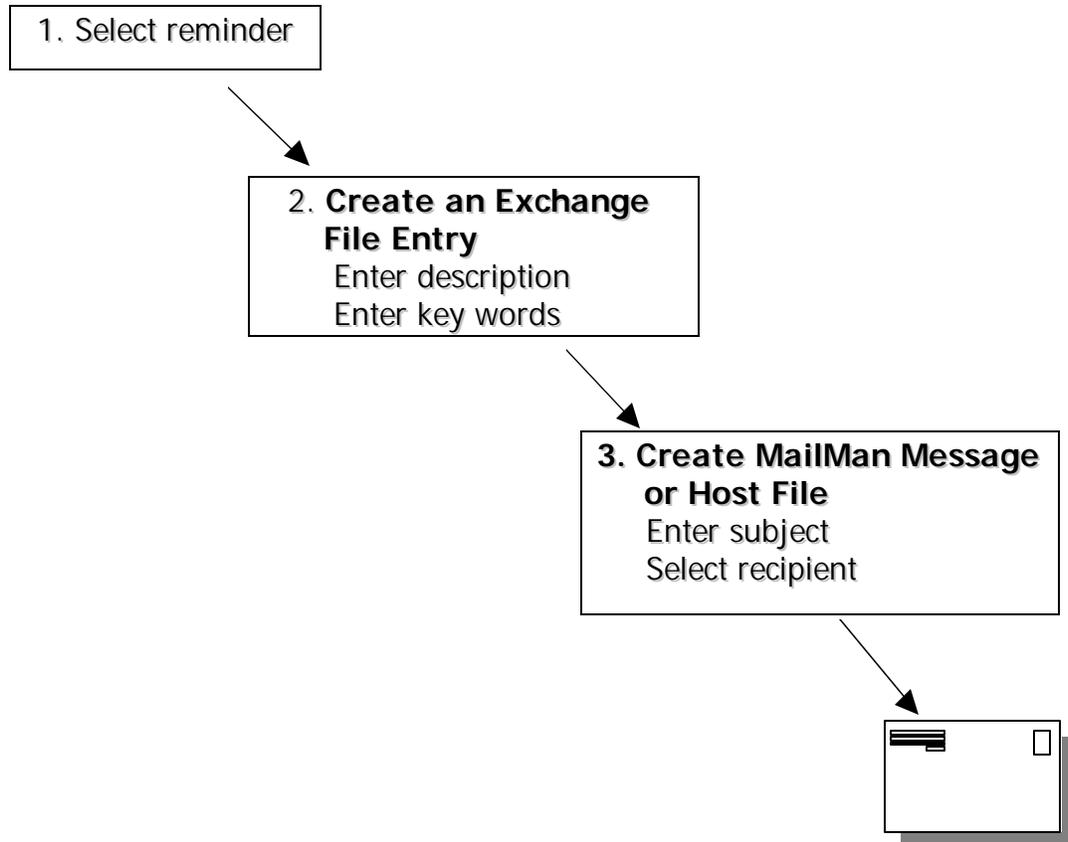
Select Reminder Managers Menu Option: RX Reminder Exchange
```

```
Clinical Reminder Exchange    Apr 02, 2001@11:21:47    Page: 1 of 1
Exchange File Entries.
```

Entry	Source	Date Packed
+ Next Screen - Prev Screen ?? More Actions		
CFE Create Exchange File Entry	IH	Installation History
CHF Create Host File	LHF	Load Host File
CMM Create MailMan Message	LMM	Load MailMan Message
DFE Delete Exchange File Entry	LR	List Reminder Definitions
IFE Install Exchange File Entry	RI	Reminder Definition Inquiry

A: Steps to Export Reminders

Export Steps



Detailed Steps to Export Reminders

1. Select a Reminder that you want to exchange. Review all of your local reminders with the action LR, then review a specific reminder definition using RI.

Clinical Reminder Exchange		Jul 23, 2001@10:33:26		Page: 1 of 2	
Exchange File Entries.					
Entry	Source		Date Packed		
<p>+ + Next Screen - Prev Screen ?? More Actions</p>					
CHF	Create Host File	LHF	Load Host File		
CMM	Create MailMan Message	LMM	Load MailMan Message		
DFE	Delete Exchange File Entry	LR	List Reminder Definitions		
IFE	Install Exchange File Entry	RI	Reminder Definition Inquiry		
Select Action: Next Screen// RI Reminder Definition Inquiry					
Select Reminder Definition: JG-DIABETIC EYE EXAM LOCAL					

JG-DIABETIC EYE EXAM	No. 660078

Print Name:	Diabetic Eye Exam
Class:	LOCAL
Sponsor:	
Review Date:	
Usage:	CPRS
Related VA-* Reminder:	
Reminder Dialog:	
Priority:	
Reminder Description:	Patients with the VA-DIABETES taxonomy should have a diabetic eye exam done yearly.
Technical Description:	This reminder is based on the Diabetic Eye Exam reminder from the New York VAMC which was designed to meet the guidelines defined by the PACT panel. Additional input came from the Saginaw VAMC.
Edit History:	
Baseline Frequency:	Do In Advance Time Frame: Do if DUE within 1 month
	Sex Specific:
	Ignore on N/A:
	Frequency for Age Range: 0Y - Not Indicated for all ages
	Match Text:
	No Match Text:
Findings:	Finding Item: DIABETIC EYE EXAM (FI(1)=EX(3))
	Finding Type: EXAM
	Use in Resolution Logic: OR
	Finding Item: VA-DIABETES (FI(2)=TX(28))
	Finding Type: REMINDER TAXONOMY
	Match Frequency/Age: 1 year for all ages
	<i>Etc.</i>

2. Create Exchange File Entry

Use the action CFE – Create Exchange File Entry to create and load a packed reminder into the Exchange File (#811.8). This allows selection of a reminder and entry of a description and keywords to be stored in the Exchange File. The description will be initialized with the description from the reminder definition. You may edit it as necessary.

Clinical Reminder Exchange		Apr 02, 2001@11:21:47	Page: 1 of 1
Exchange File Entries.			
Entry	Source	Date Packed	
1 BLOOD PRESSURE CHECK	HART@SALT LAKE	03/28/2001@13:12:26	
2 SLC PNEUMOCOCCAL VACCINE	BART@SALT LAKE	03/29/2001@11:55:11	
3 VA-*CHOLESTEROL SCREEN (M)	MART@SALT LAKE	03/27/2001@14:59:42	
4 VA-ADVANCED DIRECTIVES EDUC	WART@SALT LAKE	03/27/2001@14:54:24	
5 VA-HEP C RISK ASSESSMENT	START@SALT LAKE	03/27/2001@14:56:13	
+ Next Screen - Prev Screen ?? More Actions			
CFE Create Exchange File Entry	IH	Installation History	
CHF Create Host File	LHF	Load Host File	
CMM Create MailMan Message	LMM	Load MailMan Message	
DFE Delete Exchange File Entry	LR	List Reminder Definitions	
IFE Install Exchange File Entry	RI	Reminder Definition Inquiry	
Select Action: Quit// CFE Exchange File Entry Creation			

```
Select Reminder Definition to save: JG DIABETIC EYE EXAM LOCAL
Enter a description of the reminder you are packing.
  1>Patients with the VA-DIABETES taxonomy should have a diabetic eye exam
  2>done yearly.
EDIT Option: <Enter>
Enter keywords or phrases to help index the reminder you are packing.
Separate the keywords or phrases on each line with commas.
Diabetes, Eye, Exam
  2><Enter>
EDIT Option: <Enter>
Packing the reminder ...
```

Create Exchange File Entry, cont'd

Clinical Reminder Exchange		May 03, 2001@11:21:51	Page: 1 of 1
Packed reminder for JG DIABETIC EYE EXAM was saved in Exchange File.			
Entry	Source	Date Packed	
1 AGETEST	HARTLEY@SALT LAKE OE	04/27/2001@13:16:19	
2 JG DIABETIC EYE EXAM	GREEN@SALT LAKE OE	05/03/2001@11:21:01	
3 TEST EXCHANGE CHANGES	HARTLEY@SALT LAKE OE	05/02/2001@15:45:55	
+ Next Screen - Prev Screen ?? More Actions			
CFE	Create Exchange File Entry	IH	Installation History
CHF	Create Host File	LHF	Load Host File
CMM	Create MailMan Message	LMM	Load MailMan Message
DFE	Delete Exchange File Entry	LR	List Reminder Definitions
IFE	Install Exchange File Entry	RI	Reminder Definition Inquiry
Select Action: Quit// <Enter>			

3a. CHF-Create Host File

Use this action to create a host file containing selected entries from the Exchange File (#811.8). A host file is any file that is stored in your site's local "host" directory or system. A complete host file consists of a path, file name, and extension. A path consists of a device and directory name. The default extension is PRD (Packed Reminder Definition). Your default path is determined by your system manager. You should contact your IRM to learn how host files work at your site.

Examples of valid paths:

VMS USER\$:[SPOOL]

CACHE T:\TEMP

Clinical Reminder Exchange		Apr 02, 2001@11:21:47	Page: 1 of 1
Exchange File Entries.			
Entry	Source	Date Packed	
1 BLOOD PRESSURE CHECK	HART@SALT LAKE	03/28/2001@13:12:26	
2 SLC PNEUMOCOCCAL VACCINE	BART@SALT LAKE	03/29/2001@11:55:11	
3 VA-*CHOLESTEROL SCREEN (M)	MART@SALT LAKE	03/27/2001@14:59:42	
4 VA-ADVANCED DIRECTIVES EDUC	WART@SALT LAKE	03/27/2001@14:54:24	
5 VA-HEP C RISK ASSESSMENT	START@SALT LAKE	03/27/2001@14:56:13	
+ Next Screen - Prev Screen ?? More Actions			
CFE	Create Exchange File Entry	IH	Installation History
CHF	Create Host File	LHF	Load Host File
CMM	Create MailMan Message	LMM	Load MailMan Message
DFE	Delete Exchange File Entry	LR	List Reminder Definitions
IFE	Install Exchange File Entry	RI	Reminder Definition Inquiry
Select Action: Quit// CHF			
Select Entry(s): (1-5): 2			

Create Host File, cont'd

Enter a path: USER\$:[SPOOL]// ?

A host file is a file in your host system.

A complete host file consists of a path, file name, and extension

A path consists of a device and directory name.

The default extension is prd (Packed Reminder Definiton).

The default path is USER\$:[SPOOL]

Enter a path: USER\$:[SPOOL]// <Enter>

Enter a file name: ?

A file name has the format NAME.EXTENSION, the default extension is PRD

Therefore if you type in FILE for the file name, the host file will be

USER\$:[SPOOL]FILE.PRD

Enter a file name: **DiabeticEye**

Will save reminder to host file USER\$:[SPOOL]DiabeticEye.PRD?: Y//<Enter> ES

3b. CMM-Create MailMan Message

Use this action to create a MailMan Message containing selected entries from the Exchange File (#811.8).

Clinical Reminder Exchange		Apr 02, 2001@11:21:47	Page: 1 of 1
Exchange File Entries.			
Entry	Source	Date Packed	
1 BLOOD PRESSURE CHECK	HART@SALT LAKE	03/28/2001@13:12:26	
2 SLC PNEUMOCOCCAL VACCINE	BART@SALT LAKE	03/29/2001@11:55:11	
3 VA-*CHOLESTEROL SCREEN (M)	MART@SALT LAKE	03/27/2001@14:59:42	
4 VA-ADVANCED DIRECTIVES EDUC	WART@SALT LAKE	03/27/2001@14:54:24	
5 VA-HEP C RISK ASSESSMENT	START@SALT LAKE	03/27/2001@14:56:13	
+ Next Screen - Prev Screen ?? More Actions			
CFE Create Exchange File Entry	IH	Installation History	
CHF Create Host File	LHF	Load Host File	
CMM Create MailMan Message	LMM	Load MailMan Message	
DFE Delete Exchange File Entry	LR	List Reminder Definitions	
IFE Install Exchange File Entry	RI	Reminder Definition Inquiry	
Select Action: Quit// cmm MailMan Message Creation			

NOTE: The number of reminders you can send via a MailMan message is limited to the mailman parameters set locally for the number of lines in a message. Please check with your IRM for the number of lines allowed.

Create MailMan Message, cont'd

```
Select Entry(s): (1-5): 2
Enter a subject: [Enter a description of the Mail Message.]
Forward mail to: ?

Enter the recipient(s) of this message in any of the following formats:

Lastname,first           for a user at this site
Lastname,first@REMOTE-SITE for a user at another site
  (note: DUZ may be used, instead of Lastname,first for local or remote users)
G.<group-name>           for a mail group
D.<device-name>         for a device
*                         for a limited broadcast or broadcast to all users
                          (must be Postmaster or XMSTAR key holder)

Prefix any user address with 'I:' to send Information only.
                          'C:' to send Carbon Copy.
                          'L:' to send Later.
                          '-' to delete it.

Enter:
G.?                       for a list of mail groups
D.?                       for a list of devices

Enter '??' for detailed help.

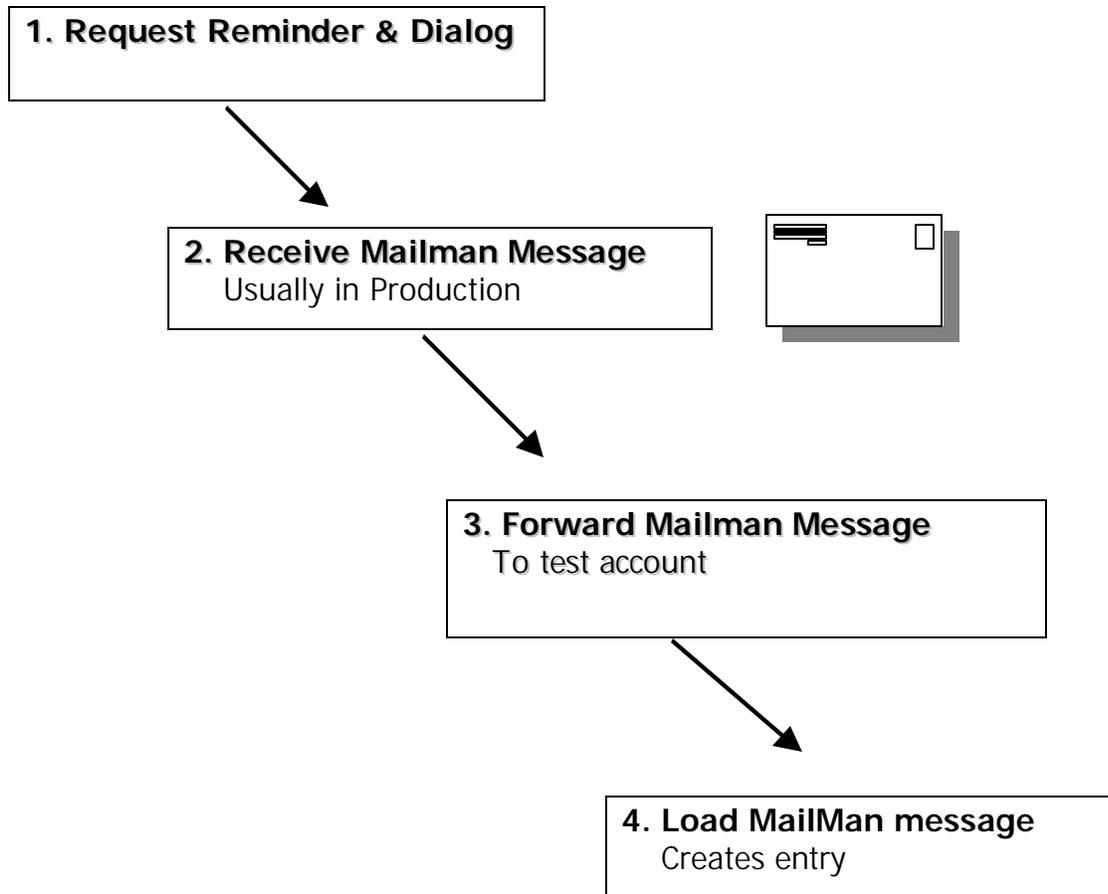
Forward mail to: [Enter a user or Mail Group.]
Select basket to send to: IN//
And Forward to:
```

```
Clinical Reminder Exchange    May 03, 2001@11:27:25    Page: 1 of 1
Successfully stored entries in message 43035.
```

	<u>Entry</u>	<u>Source</u>	<u>Date Packed</u>
1	AGETEST	HARTLEY@SALT LAKE OE	04/27/2001@13:16:19
2	JG DIABETIC EYE EXAM	GREEN@SALT LAKE OE	05/03/2001@11:21:01
4	VA-BREAST EXAM	REDINGTON@SALT LAKE OE	04/19/2001@10:03:13

```
+ Next Screen  - Prev Screen  ?? More Actions
CFE Create Exchange File Entry  IH  Installation History
CHF Create Host File            LHF Load Host File
CMM Create MailMan Message      LMM Load MailMan Message
DFE Delete Exchange File Entry  LR  List Reminder Definitions
IFE Install Exchange File Entry  RI  Reminder Definition Inquiry
Select Action: Quit//
```

B. Steps to Import Reminders



1a. LHF – Load Host File

This action lets you load a host file containing packed reminder definitions into your local Exchange File (#811.8).

NOTE: Programmer access may be required to upload local host files, depending on how local file protections are set).

Clinical Reminder Exchange		Apr 02, 2001@11:21:47	Page: 1 of 1
Exchange File Entries.			
Entry	Source	Date Packed	
1	BLOOD PRESSURE CHECK	HART@SALT LAKE	03/28/2001@13:12:26
2	SLC PNEUMOCOCCAL VACCINE	BART@SALT LAKE	03/29/2001@11:55:11
3	VA-*CHOLESTEROL SCREEN (M)	MART@SALT LAKE	03/27/2001@14:59:42
4	VA-ADVANCED DIRECTIVES EDUC	WART@SALT LAKE	03/27/2001@14:54:24
5	VA-HEP C RISK ASSESSMENT	START@SALT LAKE	03/27/2001@14:56:13
+ Next Screen - Prev Screen ?? More Actions			
CFE	Create Exchange File Entry	IH	Installation History
CHF	Create Host File	LHF	Load Host File
CMM	Create MailMan Message	LMM	Load MailMan Message
DFE	Delete Exchange File Entry	LR	List Reminder Definitions
IFE	Install Exchange File Entry	RI	Reminder Definition Inquiry
Select Action: Quit// lhf Load Host File			
Enter a path: USER\$:[SPOOL]//			
The following PRD files were found in USER\$:[SPOOL]			
DIABETICEYE.PRD;1			
Enter a file name: DIABETICEYE.PRD			
Loading host file USER\$:[SPOOL]DIABETICEYE.PRD			
Select Action: Quit// - -			

Clinical Reminder Exchange		Jul 23, 2001@11:17:42	Page: 1 of 2
Host file USER\$:[SPOOL]DIABETICEYE.PRD successfully loaded.			
+ Next Screen - Prev Screen ?? More Actions			
CFE	Create Exchange File Entry	IH	Installation History
CHF	Create Host File	LHF	Load Host File
CMM	Create MailMan Message	LMM	Load MailMan Message
DFE	Delete Exchange File Entry	LR	List Reminder Definitions
IFE	Install Exchange File Entry	RI	Reminder Definition Inquiry
Select Action: Next Screen//			

1b. LHF – Load MailMan Message

This option lets you load a MailMan message containing packed reminder definitions into your site's Exchange File (811.8).

Clinical Reminder Exchange		Jul 23, 2001@11:40:01		Page: 1 of 2	
Entry		Source		Date Packed	
+ + Next Screen - Prev Screen ?? More Actions					
CFE	Create Exchange File Entry	IH	Installation History		
CHF	Create Host File	LHF	Load Host File		
CMM	Create MailMan Message	LMM	Load MailMan Message		
DFE	Delete Exchange File Entry	LR	List Reminder Definitions		
IFE	Install Exchange File Entry	RI	Reminder Definition Inquiry		
Select Action: Next Screen// lmm Load MailMan Message					
1	CREX: diabetic eye exam				
	GREEN,JOANN JUL 23, 2001@11:39:51				
2	CREX: pain screening				
	GREEN,JOANN JUL 23, 2001@11:37:59				
CHOOSE 1-2: 1 CREX: diabetic eye exam					
	GREEN,JOANN JUL 23, 2001@11:39:51				
Loading MailMan message number 44024					

2. Installing Reminders from the Exchange File

The action IFE allows a reminder definition to be selected for installation from the Exchange File (#811.8). Details of the exchange file entry are displayed. Reminder findings are displayed (grouped by type), followed by the reminder dialog and finally the reminder definition. All or individual components may be selected for installation.

Exchange Entry Components		Jan 26, 2001@12:21:39		Page: 1 of 3	
Component		Category		Exists	
Reminder:	SMOKING CESSATION EDUCATION				
Source:	HART,PETE at SALT LAKE OEX				
Date Packed:	01/26/2001@09:38				
Description:	FINAL VERSION FROM SALT LAKE				
Keywords:	SMOKING				

Install Exchange File Entries, cont'd

Components:		
EDUCATION TOPICS		
1	VA-ADVANCED DIRECTIVES SCREENING	X
2	VA-ADVANCED DIRECTIVES	X
GMRV VITAL TYPE		
3	BLOOD PRESSURE	X
HEALTH FACTORS		
4	REMINDER FACTORS	X
5	HEPATITIS C	X
6	ACTIVATE PNEUMOCOCCAL VACCINE	X
7	PREV POSITIVE TEST FOR HEP C	X
MH INSTRUMENT		
8	CAGE	X
9	DOM80	X
10	AIMS	X
REMINDER TERM		
11	TERMTEST6	X
REMINDER DIALOG		
12	SMOKING CESSATION EDUCATION	X
REMINDER DEFINITION		
13	SMOKING CESSATION EDUCATION	X
+ Enter ?? for more actions		
IA	Install all Components	IS Install Selected Component
Select Action: Next Screen//		

The 'Exists' column indicates if the component exists on the system already. The 'Category' column applies to health factors to indicate whether or not the health factor defines a category. If it does, it must be installed before any health factors that belong to that category.

NOTE: Some findings, such as lab tests, are not transportable. These findings will be in the component list, as they are used by the definition or dialog, but you will not be able to select them for installation. Non-selectable findings will not have a number. When you install a definition or a dialog that uses a non-transportable finding, you will be prompted to enter a replacement. If it is a lab test, enter the name of the equivalent lab test at your site. The replacement item must match the finding type. A lab test cannot be replaced with anything but a lab test.

If a component is selected for installation, it may be installed without change, or copied to a new name. When installing reminder definitions or dialogs, if a component contained within the definition or dialog is missing from your system, you will be prompted to supply a replacement.

Install Exchange File Entries, cont'd

CAUTION: Before starting an installation, you should examine the list of components in the packed reminder and determine which ones already exist on your system. You should decide what you are going to do with each component and have a plan of action before proceeding with the installation.

```
REMINDER TERM entry TERMTEST6 already EXISTS, what do you want to do?
```

```
Select one of the following:
```

- C Create a new entry by copying to a new name
- I Install or Overwrite the current entry
- P Replace with another existing entry
- Q Quit the install
- S Skip, do not install this entry

```
Enter response: S// C reate a new entry by copying to a new name
```

3a. Installing a Reminder Dialog

If a reminder dialog is selected for installation, details of the dialog are displayed on an additional screen. The entire dialog may be installed or individual components of the dialog (e.g. dialog groups or sub-groups).

Dialog Components		Jan 26, 2001@12:38:51	Page:	1 of	1
Packed reminder dialog: SMOKING CESSATION EDUCATION					
Item	Seq.	Dialog Summary	Type	Exists	
1	1	HF ACTIVATE PNEUMOCOCCAL VACCINE DONE ELSEWHERE	element	X	
2	2	MH AIMS	element	X	
3	3	VM BLOOD PRESSURE DONE	element	X	
4		SMOKING CESSATION EDUCATION	dialog	X	
+ Next Screen - Prev Screen ?? More Actions					
DD	Dialog Details	DT	Dialog Text	IS	Install Selected
DF	Dialog Findings	DU	Dialog Usage	QU	Quit
DS	Dialog Summary	IA	Install All		
Select Action: Quit//					

NOTE: Order dialogs (quick orders) will be treated like findings that are not transportable, such as lab tests. They will appear in the list, as they are used by the dialog; however, they will not be selectable for installation. When you install the dialog, you will be given the opportunity to replace the quick order with a local one or to delete it from the dialog.

Installing a Reminder Dialog, cont'd

Other views may be selected:

DD Dialog Details – displays dialog summary plus any PXRМ type additional prompts.

DF Dialog Findings – displays the findings associated with each dialog component and if the finding already exists on the system.

DT Dialog Text – displays the dialog question text for each component. This gives a preview of how the dialog will display in CPRS.

DU Dialog Usage – displays any other existing reminder dialogs using these components.

The reminder dialog or dialog component may be installed from any view in the same manner as other reminder components. Dialog components may be installed or copied to a new name.

3b. Quick Install of Reminder Dialogs

If the reminder dialog and all components are new (or exist already), you can use a quick install option. If only some of the components exist, you will be stepped through them individually. Note that if a dialog is installed without the reminder definition, the option is given to link the dialog to an existing reminder.

Dialog Components		Jan 26, 2001@12:52:05		Page: 1 of 1	
Packed reminder dialog: DEMO REMINDER - SIMPLE					
Item	Seq.	Dialog Summary	Type	Exists	
1		DEMO REMINDER - SIMPLE	dialog		
2	5	IM HEP A DONE	element		
3	10	IM HEP A DONE ELSEWHERE	element		
4	15	IM HEP A CONTRA	element		
+ Next Screen - Prev Screen ?? More Actions					
DD	Dialog Details	DT	Dialog Text	IS	Install Selected
DF	Dialog Findings	DU	Dialog Usage	QU	Quit
DS	Dialog Summary	IA	Install All		
Select Action: Quit// IA Install All					
All dialog components for DEMO REMINDER - SIMPLE are new.					
Install reminder dialog without making any changes: Y// ES					
Reminder Dialog DEMO REMINDER - SIMPLE is not linked to a reminder.					
Select Reminder to Link: LOCAL HEP A IMMUNIZATION					

Installing a Reminder Dialog, cont'd

Dialog Components		Jan 26, 2001@12:52:05	Page: 1 of 1		
Packed reminder dialog: DEMO REMINDER - SIMPLE					
DEMO REMINDER - SIMPLE (reminder dialog) installed from exchange file.					
Item	Seq.	Dialog Summary	Type Exists		
1		DEMO REMINDER - SIMPLE	dialog		
2	5	IM HEP A DONE	element		
3	10	IM HEP A DONE ELSEWHERE	element		
4	15	IM HEP A CONTRA	element		
+ Next Screen - Prev Screen ?? More Actions					
DD	Dialog Details	DT	Dialog Text	IS	Install Selected
DF	Dialog Findings	DU	Dialog Usage	QU	Quit
DS	Dialog Summary	IA	Install All		
Select Action: Quit//					

NOTE: Changes to Reminder Exchange made in Patch 7:

If local findings have been mapped to terms or dialogs, the local finding mappings are retained when a new version of the term or dialog is loaded into the system. This applies to both reminders loaded as a patch and reminders loaded from mail messages.

Reminder terms retain the existing mappings and add any new findings imported on the term. Dialog components retain the existing mappings and ignore the incoming mappings.

You will no longer get a MailMan message telling you that a term or a dialog was skipped during the patch install.

4. IH – Installation History

Use this option to review the installation of an imported reminder.

Clinical Reminder Exchange		Jul 23, 2001@11:27:15	Page:	1 of 2
Exchange File Entries.				
	Entry	Source	Date Packed	
1	A NEW REMINDER	HARTLEY@SALT LAKE OE	06/18/2001@11:50:40	
2	A**A SG PAIN SCREENING	GREEN@SALT LAKE OE	07/23/2001@10:55:23	
4	AIMS	CORRIGAN@TAMPA, FL	06/04/2001@13:55:59	
+ + Next Screen - Prev Screen ?? More Actions				
CFE	Create Exchange File Entry	IH	Installation History	
CHF	Create Host File	LHF	Load Host File	
CMM	Create MailMan Message	LMM	Load MailMan Message	
DFE	Delete Exchange File Entry	LR	List Reminder Definitions	
IFE	Install Exchange File Entry	RI	Reminder Definition Inquiry	
Select Action: Next Screen// IH Installation History				
Select Entry(s): (1-4): 2				

Installation History, cont'd

Installation History		Jul 23, 2001@11:27:27	Page: 1 of 1
Entry	Source	Date Packed	
A**A SG PAIN SCREENING	GREEN@SALT LAKE OE	07/23/2001@10:55:23	
Installation Date	Installed By		
-----	-----		
1 07/23/2001@10:58:48	GREEN,JOANN		
Enter ?? for more actions			
DH	Delete Install History	ID	Installation Details
Select Action: Quit// ID Installation Details			
A**A SG PAIN SCREENING	07/23/2001@10:55:23	07/23/2001@10:58:48	
Component	Action	New Name	
EDUCATION TOPICS			
1	MANAGING PAIN	S	
HEALTH FACTORS			
2	REMINDER FACTORS	S	
3	Pain New Category	S	
4	PAIN PATIENT DECLINED TO REPORT PAIN	S	
5	PATIENT UNABLE TO REPORT PAIN SCORE	S	
6	PAIN PATIENT REPORTS NEW PAIN	S	
7	PATIENT REPORTS NEW PAIN	S	
8	HF.SG PATIENT NEEDS PAIN ASSESSMENT	S	
TIU TEMPLATE FIELD			
9	SUSAN OLD/NEW	S	
Installation Detail		Jul 23, 2001@11:27:39	Page: 2 of 2
+	Entry	Date Packed	Date Installed
REMINDER DEFINITION			
10	A**A SG PAIN SCREENING	S	
Enter ?? for more actions			
Select Action:Quit//			

7. Delete Exchange File Entry

Use this option to delete selected entries from the Exchange File (811.9).

```
Select Reminder Managers Menu Option: RX Reminder Exchange

Clinical Reminder Exchange   Jun 21, 2001@12:09:19   Page:   1 of   3
Exchange File Entries.
```

Entry	Source	Date Packed
1 A NEW REMINDER	HARTLEY@SALT LAKE OE	06/18/2001@11:50:40
2 AIMS	CORRIGAN@TAMPA, FL	06/04/2001@13:55:59
3 DRUGTEST	REDINGTON@SALT LAKE OE	06/18/2001@10:25:32
4 HIV HEPATITIS A SEROLOGIC T	SUNDARAM@VAMC PALO AL	06/19/2001@15:00:30
5 ITC2000 MAMMOGRAM	HARTLEY@SALT LAKE OE	06/19/2001@15:25:03
6 JG DIABETIC EYE EXAM	GREEN@SALT LAKE OE	06/08/2001@11:17:26
7 MINI-MENTAL STATE EXAM (MMS	CORRIGAN@TAMPA, FL	05/16/2001@23:00:36
8 OTC & NON-VA MEDICATION	CORRIGAN@TAMPA, FL	05/17/2001@22:46:37

```

+ Next Screen - Prev Screen ?? More Actions
CFE Create Exchange File Entry      IH  Installation History
CHF Create Host File                 LHF Load Host File
CMM Create MailMan Message           LMM Load MailMan Message
DFE Delete Exchange File Entry       LR  List Reminder Definitions
IFE Install Exchange File Entry       RI  Reminder Definition Inquiry
Select Action: Next Screen// DFE Delete Exchange File Entry
Select Entry(s): (1-10): 6
```

```
Clinical Reminder Exchange   Jun 21, 2001@12:09:47   Page:   1 of   3
Deleted 1 Exchange File entry.
```

Entry	Source	Date Packed
1 A NEW REMINDER	HARTLEY@SALT LAKE OE	06/18/2001@11:50:40
2 AIMS	CORRIGAN@TAMPA, FL	06/04/2001@13:55:59
3 DRUGTEST	REDINGTON@SALT LAKE OE	06/18/2001@10:25:32
4 HIV HEPATITIS A SEROLOGIC T	SUNDARAM@VAMC PALO AL	06/19/2001@15:00:30
5 ITC2000 MAMMOGRAM	HARTLEY@SALT LAKE OE	06/19/2001@15:25:03
6 MINI-MENTAL STATE EXAM (MMS	CORRIGAN@TAMPA, FL	05/16/2001@23:00:36
7 OTC & NON-VA MEDICATION	CORRIGAN@TAMPA, FL	05/17/2001@22:46:37
8 PJH CANCER SCREEN	HARTLEY@SALT LAKE OE	05/18/2001@11:08:39

```

+ Next Screen - Prev Screen ?? More Actions
CFE Create Exchange File Entry      IH  Installation History
CHF Create Host File                 LHF Load Host File
CMM Create MailMan Message           LMM Load MailMan Message
DFE Delete Exchange File Entry       LR  List Reminder Definitions
IFE Install Exchange File Entry       RI  Reminder Definition Inquiry
Select Action: Next Screen//
```

NOTE: This does not delete the Host file or MailMan message from the VISTA system. If the Host file or MailMan message are not needed any more, you must delete these separately.

Tips for exchanging reminders

- Try at least one simple one first – and check the dialog!
- A Category for a health factor must exist to install the health factor.
- To use your own finding in a reminder you are importing, use the SKIP option. Then when the reminder is installed, you will be prompted for the finding to use in the reminder.
- Review local findings carefully.
- Allow dedicated time.
- Review the findings (terms, taxonomies).
- Document in your reminders what your intent and logic were in making it.
- Remember: When you import a reminder, it is YOURS.
- Some sites have Web pages set up for review – use the web before requesting reminders.
- Test!

Section III – Supplementary Material

Glossary

FAQs, Hints, and Troubleshooting

Appendix A: Checklist for defining Reminder Definition and Dialog

Appendix B: Clinical Reminder Menus

Appendix C: Reminder Definition Feedback Loop Diagram

Index

Glossary

- Applicable** In order for a reminder to be applicable, the Patient Cohort Logic must evaluate to true for the patient. In other words, when the Patient Cohort Logic is true, the patient is in the cohort and the reminder is applicable.
- Autogenerate** Autogeneration is a tool for creating reminder dialogs from the reminder definition. It automatically adds dialog elements (sentences) to a reminder dialog for each finding on the reminder, with sentence text generated from the finding name. Appropriate parameters in the Dialog Parameters files that contain the prefix (e.g., *Patient received*) and suffix text (e.g., *at this encounter*) must be completed before autogeneration can work. Example of autogenerated element: *Patient received Tobacco Use Education at this encounter*
- Computed Findings** A custom MUMPS routine used to find some specific patient characteristic. Computed findings are used when none of the standard findings will work. Sites can create their own computed findings
- Dialog** A dialog is a list of items/actions/sentences that can be used to collect patient data and create Progress Note text. By clicking on checkboxes, you can indicate what actions were taken during an encounter. These dialog items are based on guidelines at your site and how your Reminder Managers define the reminders and dialogs.
- A dialog is an entry in the Reminder Dialog file. The entry may be a dialog element, a dialog group, an additional prompt, a result element, or a result group. These are defined below:
- Dialog element* A dialog element is defined primarily to represent sentences to display in the CPRS window with a check box. When the user checks the sentence off, the FINDING ITEM in the dialog element and the ADDITIONAL FINDINGS will be added to the list of PCE updates, orders, and mental health tests. The updates won't occur on the CPRS GUI until the user clicks on the FINISH button. Dialog elements may have components added to them.

Glossary, cont'd

<i>Dialog Element, contd</i>	Autogenerated components are based on the additional prompts defined in the Finding Type Parameters. Once a dialog element is autogenerated, the sites can modify it. Dialog elements may also be instructional text or a header. The FINDING ITEM and components are not defined in dialog elements.
<i>Dialog group</i>	Dialog groups are similar to menu options. They group dialog elements and dialog groups within its component multiple. The dialog group can be defined with a finding item and checkbox. The components in the group can be hidden from the CPRS GUI window until the dialog group is checked off.
<i>Prompt</i>	A prompt is defined for PCE prompts or as locally created comment checkboxes. The prompts do not have any components within them. PXR- prefixed prompts are distributed in this file with the Clinical Reminder package.
<i>Result element</i>	A result element contains special logic that uses information entered during the resolution process to create a sentence to add to the progress note. The special logic contains a CONDITION that, when true, will use the ALTERNATE PROGRESS NOTE TEXT field to update the progress note. A separate result element is used for each separate sentence needed. The result element is only used with mental health test finding items. Default result elements are distributed for common mental health tests, prefixed with PXR and the mental health test name. Sites may copy them and modify their local versions as needed.
<i>Result group</i>	A result group contains all of the result elements that need to be checked to create sentences for one mental health test finding. The dialog element for the test will have its RESULT GROUP/ ELEMENT field defined with the result group. Default result groups for mental health tests are distributed with the Clinical Reminders package. Sites may copy them and modify their local versions as needed.
Drawer	Drawers are what we call the buttons on the Notes tab for Templates, Reminders, and Encounters. After you begin a new note, you will see the Reminders button or “drawer.” Click to open the drawer and see a tree view of reminders that are due, applicable, and other reminders.

Glossary, cont'd

Findings	Data from VISTA packages (Lab, Mental Health, PCE, Pharmacy, Radiology, Vitals, etc., and Computed Findings) are called Findings. Findings are used to define the Patient Cohort Logic and Resolution Logic and to provide relevant clinical information.
Finding type	This refers to the source of the finding, such as the files for Drugs, Education Topics, Exams, Health Factors, Immunizations, Laboratory Tests, Mental Health Instruments, Orderable Items, Radiology Procedures, Reminder Computed Findings, Reminder Taxonomies, Reminder Terms, Skin Tests, VA Drug Class, VA Generic, and Vital Measurements.
Folders:	
<i>All Evaluated</i>	This folder contains all reminders that have been evaluated.
<i>Due</i>	This folder contains reminders that are due.
<i>Applicable</i>	This folder contains reminders that are applicable but not due.
<i>Not Applicable</i>	This folder contains reminders that are not applicable.
<i>Other Categories</i>	This folder contains Reminder Categories if they have been created at your site. Categories group together related reminders, to make processing more efficient. Each Category will have its own folder within the Other Categories folder.
Forced Value	Values that are automatically stuffed into dialogs. Two forced values are included in this release, PXRМ REFUSED and PXRМ REPEAT CONTRAINDICATED. The effect of a forced value is to automatically fill the PCE education “refused” field. These don't display on the dialog, but are built into the dialog when the autogenerate runs.
Health Factors	Patient information that can't be coded, such as Alcohol Use, Binge Drinking, Current Non-Smoker, Current Smoker, Currently Pregnant, Family Hx of Alcohol Abuse, Lifetime Non-Smoker, No Risk Factors For Hep C, etc.

Glossary, cont'd

Patient Cohort	A group of patients that meet the defined criteria (Patient Cohort Logic) for a reminder. In other words, if the reminder is applicable, the patient is in the cohort.
Patient Cohort Logic	This is the logic that specifies how findings are used to select the applicable patient population; i.e., the patient cohort. It is based on Mumps Boolean operators and their negations. The operators are: ' (OR), & (AND), !' (OR NOT), and &' (AND NOT).
Reminder Categories	A category defines a group of reminders and may include other sub-categories. Categories appear in the Other folder in the Notes and Consults tabs of the CPRS GUI.
Resolution Logic	Resolution logic specifies how findings are used in resolving a reminder. It is based on Mumps Boolean operators and their negations. The operators are: ' (OR), & (AND), !' (OR NOT), and &' (AND NOT)
Resolve, Reminders Resolution	Recording or taking action that satisfies a reminder. For example, if a reminder exists for influenza immunization, giving a flu vaccine satisfies or resolves that reminder. Likewise, ordering lab tests or drugs or giving patient education can resolve a reminder.
Taxonomies	Coded data such as diagnoses or procedures with ICD or CPT codes. Reminder taxonomies provide a convenient way to group coded values and give them a name. For example, the VA-DIABETES taxonomy contains a list of diabetes diagnoses.
Term	Reminder terms provide a way to define a general term, for example diabetes diagnosis, which can be linked to specific findings.
Tree View	A hierarchical view of reminder categories, with reminders listed underneath. This view is visible when you press the Reminders button or when the reminders drawer is open. It shows the reminders divided into the Due, Applicable, and Other categories.

Icon Definitions

CPRS uses two parameter lists of reminders, one for evaluation (the ORQQPX SEARCH ITEMS parameter) and one for the "Other" section of the tree (the PXRМ CPRS LOOKUP CATEGORIES parameter). The CPRS GUI combines these two lists into one tree view.

Icon	Description
	Red, ringing alarm clock means that a reminder is due. When present in the reminders button, reminders from the ORQQPX SEARCH ITEMS parameter have been evaluated, and there is at least one reminder due.
	Blue, non-ringing alarm clock means that a reminder is not due, but applicable. When present in the reminders button, reminders from the ORQQPX SEARCH ITEMS parameter have been evaluated, none of them evaluated to due, but at least one of them has been evaluated as applicable.
	Wall clock means that a reminder is not applicable. When present in the reminders button, reminders from the ORQQPX SEARCH ITEMS parameter have been evaluated, none of them evaluated to due or applicable, but reminders have been evaluated as not applicable that were found in the PXRМ CPRS LOOKUP CATEGORIES parameter.
	Question mark means that a reminder's status of due, applicable or not applicable has yet to be evaluated. When present on the reminders button, no available reminders have been evaluated. This typically happens when reminders in the ORQQPX SEARCH ITEMS parameter are not defined or have not yet been evaluated.
	Present only on the reminders button, a grayed-out alarm clock means that reminders from the ORQQPX SEARCH ITEMS parameter have been evaluated, none of them evaluated to due or applicable, and no reminders were found in the PXRМ CPRS LOOKUP CATEGORIES parameter.
	Present only in the reminders tree, a dialog icon is displayed in the lower right hand corner of a clock icon when there is a reminder dialog associated with that reminder.
	Present only in the reminders tree, a dialog icon, with a check mark over the dialog, is displayed in the lower right hand corner of a clock icon after the reminder dialog associated with that reminder has been processed. When these reminders are re-evaluated, the check mark is removed.

FAQs (Frequently Asked Questions)

General

Reminder Definition

Computed Findings

Reminder Dialogs

Mental Health Reminder Dialogs

Reminder Reports

General Questions

Q: What do we need to do to get started with the new Clinical Reminders application?

A: Some of the recommended steps:

1. Identify leaders; form a steering committee; get administrative support
2. Implement gradually
3. Use the report options to identify needs
4. Customize the list of reminders that are displayed for users in the CPRS GUI, making sure they see only reminders that are relevant for them.

Q: How can we avoid overwhelming clinicians with too many reminders?

A: As stated above, implement gradually. The following steps can help:

1. Prioritize reminders
2. Share responsibility
3. Use the report options to help balance the workload within a team

Q: What do clinicians need to learn to use the new Clinical Reminders functionality?

A: The most important things to learn will be related to a change in workflow. It will be important to coordinate orders that are placed through reminder dialogs with nurses and clerks. You can work with your CACs and teams to share the responsibility for reminders so that no individual is overwhelmed with reminders. Learning to use reports correctly, to produce meaningful data, will be essential.

FAQs, cont'd

Q: What is the difference between the exported Clinical Reminders that have an asterisk (*). e.g. VA-*SEAT BELT AND ACCIDENT SCREEN and those that only have VA-; e.g., VA-SEAT BELT EDUCATION

A: The asterisk (*) identifies the reminders related to the National Center for Health Promotion. They were created based on the 13 issues identified by the National Center for Health Promotion in Handbook 1101.8.

(Most of the other reminders beginning with VA- were created with input by the "Ambulatory Care Expert Panel" which no longer exists.)

However, that handbook has been replaced by Handbook 1120.2 ("HEALTH PROMOTION AND DISEASE PREVENTION PROGRAM"). You can retrieve a copy from:

<http://vaww.va.gov/publ/direc/health/handbook/1120-2hk.doc>

Q: Are the reminders our site has already defined compatible with the new Clinical Reminders v.1.5 package?

A: Yes, a conversion utility is run when the package is installed that converts your reminders to the new file structure. Be sure to follow the instructions in the Installation Guide to set a few important parameters.

Q: Can you set up a user to have no reminders on the cover sheet?

A: Make sure ORQQPX NEW REMINDER PARAMS is set to NO for the specific user. Create a dummy reminder that always evaluates as Not Applicable. Then add just that reminder to the ORQQPX SEARCH ITEMS parameter, at the user level.

FAQs, cont'd

Q: I have a user whose reminders are not showing. The due now shows, but when she goes into the dialog, she sees a blank screen. She is the only person this is happening to.

Before she went on leave two weeks ago, the program worked fine, but now she is back and it is not working. I tried to refresh her parameters, to no avail.

A: We just figured it out. Just in case any of you ever have the same problem, the user had moved her lower margin to the top of the screen.

A2: This is a Windows problem. We have providers who work on several PCs. If they are on a high-resolution screen and move one of the margins to the edge and log off, the setting remains. If they log onto a low-resolution screen, they won't even be able to see that margin. This is true with the GUI, Explorer, etc.

Reminder Definition Questions

Q: We are having a problem at our facility with diabetic reminders showing up on patients who do not have diabetes. A little research has shown that the reminder is working correctly, but an incorrect diagnosis had been entered into the patient's record in the past. I found one case where the patient had an elevated glucose level and the provider had diagnosed borderline diabetes. Either the provider checked diabetes on the encounter form or a coder had used a diabetes code incorrectly.

How are other facilities handling this problem?

A1: The fastest solution I've heard of is to create a Health Factor for "past diagnosis of diabetes not applicable", and then use it in the patient cohort logic to skip any patient for whom that HF has been recorded.

A 2: On a case-by-case basis. When the provider who marked the encounter form or problem list is contacted to determine if the diabetes designation was in error, the problem list or specific encounter is edited as appropriate. As billing may be involved, MCCF is also contacted.

A3: We send the problems to a coding mail group. They follow and make any need corrections to the encounter.

A4: We use a health factor, INACTIVATE DIABETIC REMINDERS, to get around this problem.

FAQs, cont'd

A5: Tampa uses:

1. Diabetes Taxonomy that only uses outpatient and problem list codes to define the cohort (to eliminate errors from Inpatient coding)

```
DIABETES CODES - OUTPT      Diabetes- Outpt codes

General Taxonomy Data
NAME: DIABETES CODES - OUTPT
BRIEF DESCRIPTION: Diabetes- Outpt codes
PATIENT DATA SOURCE: EN,PL//
USE INACTIVE PROBLEMS:
INACTIVE FLAG:

ICD0 Range of Coded Values
Select ICD0 LOW CODED VALUE:

ICD9 Range of Coded Values
Select ICD9 LOW CODED VALUE: 250.00//
  ICD9 LOW CODED VALUE: 250.00//
  ICD9 HIGH CODED VALUE: 250.93//
```

2. Health Factor: INACTIVATE DIABETES REMINDERS. (effective period set at 6M for this finding in the reminder)

3. Reminder Dialog with instructions to contact coder for database correction. If the database is not corrected, the 6M effective period for the finding item INACTIVATE DIABETES REMINDERS expires and the diabetes reminders will again appear.

A6: If you enter something into the effective date in the taxonomy finding field, it should correct this problem. We use 1 year or 6 months and it seems to be working fine.

A7: When we find problems with wrong diagnosis or codes entered either the CAC, one of the physicians or the RNP who assist with the Clinical Reminders will make the correction to the code. We are very fortunate here because the RNP that assist us has years of experience with the coding process. Her name is Vickie Ramsey, I'm sure she would be of great assistance to you if needed.

A8: Two ways to deal with it (in addition to improving quality of data capture):

- 1) Have identification of diabetics depend upon drugs and diagnoses in Problem List and Discharge Diagnoses (I distributed the example in a message in Forum (Subj: A1C reminder with edited cohort logic 12 Dec 00 12:48 207 lines).

FAQs, cont'd

Customized PATIENT COHORT LOGIC to see if the Reminder applies to a patient:
(SEX)&(AGE)&'FI(7)&(FI(8)!FI(16)!FI(13)!FI(15)!FI(12))

2. Capture "NOT DIABETIC" Health Factor to ignore diagnoses and tweak effective periods.

I favor the first and getting clinicians to clean up Problem List.

We have the electronic problem lists on line (for almost two yrs) and I set the reminder to only look at problem lists and the ptf file. Usually the incorrect dx was being put in from the encounter form or by clerks during checkout

Q: Has anyone figured out a way to set up a clinical reminder so that it keeps coming up until it has been done 3x in a one-year period? This is the EPRP requirement for tobacco cessation counseling. We could set it for every 3-4 months but the patient could potentially come in 2x in a month and then not again for a year. Thanks in advance for any ideas.

A: I made four separate reminders. The reason for four was that the requirement is the next three visits. I feel it would be wrong to not counsel the patient with the screening, thus that is the first time and the next three would satisfy the requirement.

A2: We made three health factors: tobacco counseling 1, tobacco counseling 2, and tobacco counseling 3. Resolution logic is (1&2&3).

A3: Ours is set up so that it is always due for patients who continue to smoke or have recently quit. That way, the patient will be asked about tobacco use and offered enrollment in a cessation program if still using, or encouraged to remain abstinent if they have quit. Hopefully with more encouragement, we will be more successful.

Q: Reminder turned off by a progress note entry

I would like an easy way to have a reminder turned off by a progress note entry. I have some forum messages that refer to the website, I did that but it looks like some heavy computer entry. What I want is just a simple set-up if possible.

A: Please see the Computed Findings section of this FAQs section.

FAQs, cont'd

Q: I have put together a reminder for CPAP/BIPAP -- they want to see the patients every year for evaluation of equipment, to see if the patient is using the equipment correctly and also to re-evaluate the patient need for the equipment.

Two problems:

- 1) My finding items: For CPAP is E0601 For BIPAP - I am being told to use VA123. The problem is that I cannot enter the VA123.
- 2) I had it set with just the E0601 and got everyone in the data base needing the assessment. I then placed the following:

```
CUSTOMIZED PATIENT COHORT LOGIC (OPTIONAL): (SEX)&'(AGE)!FI(1)
// (SEX)&'(AGE)!FI(1) ---- I got no reminders showing
```

then:

```
CUSTOMIZED PATIENT COHORT LOGIC (OPTIONAL): (SEX)&(AGE)!FI(1)
// (SEX)&(AGE)!FI(1) ---- I got everyone needing the assessment
```

Does anyone have any ideas?

A1: Looks like the cohort was trying to find patients who have a sex, and no age or FI. Seems like that is doomed to fail.

A2: And the second string looks like you are looking for a cohort that has a SEX and AGE OR FI(1) - seems like that would pick up EVERYone with the right sex and age.

Q2: How would you set it up? Keep in mind that if I do not include the sex and age part, it does not work.

A3: If the cohort can be defined by a specific code or finding, then the logic should be SEX & AGE & (FINDING).

FAQs, cont'd

Q: This education reminder will not load on the cover sheet; my other ones have. The cover sheet shows the ? mark, not evaluated. From previous NOIS reports, the cohort logic is a problem, but I don't know how to troubleshoot that.

```
PSA ED-ASH                               No. 637009
Print Name:                               Prostate Screening Education
Related VA-* Reminder:
Reminder Dialog:                           PSA ED-ASH

-----
Baseline Frequency:
Do In Advance Time Frame: Do if DUE within 3 months
    Sex Specific: MALE
    Ignore on N/A: SA
    Frequency for Age Range: 1 year for ages 50 to 72
    Match Text:
    No Match Text:
Findings:
    Finding Item: LIFE EXPECTANCY < 6 MONTHS (FI(2)=HF(637121))
    Finding Type: HEALTH FACTOR
    Found Text: Documented life expectancy less than 6
months, excludes patient from performance measures.
    Rank Frequency: 1
    Use in Resolution Logic: OR
    Effective Period: 1Y
    Finding Item: VA-RACE (FI(3)=CF(6))
    Finding Type: REMINDER COMPUTED FINDING
    Match Frequency/Age: 1 year for ages 40 to 72
    Use in Patient Cohort Logic: AND
    Condition: I V["BLACK"
    Finding Item: PROSTATE CA EDUCATION (FI(4)=ED(637012))
    Finding Type: EDUCATION TOPIC
    Found Text: Documentation, pros and cons (risks and
benefits) of screening for prostate cancer were discussed with the
patient. The patient was given the opportunity to ask questions and
verbalized understanding of this information.
    Use in Resolution Logic: AND
    Finding Item: PROSTATE SPECIFIC AG(PSA)
(FI(5)=LT(1413))
    Finding Type: LABORATORY TEST
    Not Found Text: Date of last PSA not on file. Please order test or
document through an historical encounter.
    Use in Resolution Logic: OR
    Finding Item: PROSTATE CA (FI(6)=TX(637035))
    Finding Type: REMINDER TAXONOMY
    Use in Patient Cohort Logic: AND NOT
    Finding Item: PREVENTION CARE INDEX (FI(7)=TX(637040))
    Finding Type: REMINDER TAXONOMY
```

FAQs, cont'd

```
Use in Patient Cohort Logic:  AND NOT
Default PATIENT COHORT LOGIC to see if the Reminder applies to a patient:
    (SEX)&(AGE)&FI(3)&'FI(6)&'FI(7)
Expanded Patient Cohort Logic:
    (SEX)&(AGE)&FI(VA-RACE)&'FI(PROSTATE CA)&'FI(PREVENTION CARE INDEX)
Default RESOLUTION LOGIC defines findings which can resolve the Reminder:
    FI(2)&FI(4)!FI(5)
Expanded Resolution Logic:
    FI(LIFE EXPECTANCY < 6 MONTHS)&FI(PROSTATE CA EDUCATION)!
    FI(PROSTATE SPECIFIC AG(PSA))
```

A: Take the computed finding for race out of the cohort logic. Also, in the resolution logic, use OR instead of AND.

```
Replace    FI(2)&FI(4)!FI(5)
With      FI(2)!FI(4)!FI(5)
```

Q: I cannot tell from the manual what the correct syntax is for using PXRMSSEX in the condition field.

I have tried:

```
I PXRMSSEX=F^FEMALE
I PXRMSSEXF^FEMALE
I PXRMSSEX="F^FEMALE"
I PXRMSSEX="FEMALE"
```

etc.

I can get it to work with I PXRMSSEX["F"] but this is not ideal and doing a male is not as easy. What is the correct way to write the expression?

A: When using PXRMSSEX in a CONDITION, you can use it a number of ways.

Examples:

```
I $(PXRMSSEX,"^",1)="M"  I $(PXRMSSEX,"^",2)="MALE"  I PXRMSSEX["FE"]
I $(PXRMSSEX,"^",1)="F"  I $(PXRMSSEX,"^",2)="FEMALE"  I PXRMSSEX["FE"]
```

The first set selects male patients while the second set selects female patients.

FAQs, cont'd

Q: Before patch 5 was installed, we had the problem of using a dialog element with a prompt that is a copy of PXRMR VISIT DATE, and neither the date or location prompt was displayed. After the fix in patch 5, setting the default to "M" works - the month is required. However, when setting the default to "0M" - the month is no longer required. The year is blanked out as expected with the "0" in the default field when it is there alone or with the "M".

```
Prompt NAME: DATE PROMPT FOR MONTH Replace
DISABLE Prompt:
CLASS: LOCAL//
SPONSOR:
REVIEW DATE:
PROMPT CAPTION: Date://
EXCLUDE FROM PROGRESS NOTE:
DEFAULT VALUE: 0M// M
Select CHECKBOX SEQUENCE:
Input your edit comments.
Edit? NO//
```

A: Try M0 instead of 0M. With the default set to "M0", the month is required and the year is blank.

Computed Findings

Q: Has anyone developed a reminder that will search for a blank allergy field?

A: Hines uses one that requires this computed finding:

```
GMRA(DFN,TEST,DATE,VALUE,TEXT) ;;RETURN DATA ABOUT ENTRIES IN ART
PACKAGE
    N AJEY
    S AJEY=$$NKA^GMRANKA(DFN)
    S TEST=0,DATE=""
    I AJEY="" S TEST=1, DATE=DT
    Q
```

This finding will return TRUE if there is *any* data in the PATIENT ALLERGIES file. The way we use it is a reminder that is due for all patients, and satisfied if this returns true. That way, anyone DUE for the reminder has no data in the file at all.

FAQs, cont'd

A2: We took this one step further at Northern California. We used the computed finding from Cyndi McCracken at West Palm to create a reminder if there was no allergy info entered and we made a dialog for it that takes the user to the allergy/ADR entry dialog so that they can enter allergy information.

Q: Has anyone created a PPD reminder that picks up LTC patients and employees in the cohort logic? I'm guessing that I will need computed findings created for each category. Does anyone have these?

A: We have used a computed finding to identify the patients in long-term care. Note, however, that the way Hines has identified their long-term care patients, we are only able to reliably do this by specific ward names. This means that while the methods will work for you, the particulars of the computed finding will need to be re-programmed for your site's LTC ward names, or some other mechanism.

Techie section:

"ECC" and "RCF" are the names of our long term WARD LOCATIONS. Other sites may be able to use treating specialty or other designation to uniquely identify a LTC patient.

```
NHCU(DFN,TEST,DATE,VALUE,TEXT) ;LOCAL TO HINES - IS PATIENT IN NHCU?  
N VAIN  
D INP^VADPT  
S TEST=0,DATE=DT  
I $P(VAIN(4),"^",2) ["ECC" S TEST=1  
I $P(VAIN(4),"^",2) ["RCF" S TEST=1  
Q
```

A2: We have a computed finding to find employees, which starts out in the PATIENT file, then uses the SSN x-ref to jump over to the new person file and paid employee file. We exclude certain factors from the entries in the last two files until we have active employees who are not med students or contract employees. The reminders come due on these employees during their birth month and remain due until a PPD has been done.

Then we generate a mail message to a chief's mailgroup on the first of each month which lists, by service, the employees who have BD's that month. Additionally, we generate an individual bulletin to each employee on the list reminding them of PPD due.

Q: Reminder turned off by a progress note entry

I would like an easy way to have a reminder turned off by a progress note entry. What I want is just a simple setup if possible.

A: VISN1 created a VISN-wide reminder for AIMS testing. One of the FINDINGS is a title of a Progress Note. Here's the FINDING info:

```
Select one of the following:
  A      All reminder details
  G      General
  B      Baseline Frequency
  F      Findings
  L      Logic
  D      Reminder Dialog
  W      Web Addresses
Select section to edit: f Findings
Findings
Choose from:
CF      WRJ-TITLE
DC      CN700
DC      CN701
DC      CN709
HF      ACTIVATE AIMS
HF      WRJ-REFUSES AIMS TEST
MH      AIMS
TX      WRJ-SCHIZOPHRENIA
Select FINDING: cf.wrj-title
      Searching for a REMINDER COMPUTED FINDING, (pointed-to by FINDING
ITEM)
      WRJ-TITLE      LOCAL
      ...OK? Yes//      (Yes)
FINDING ITEM: WRJ-TITLE//
MINIMUM AGE:
MAXIMUM AGE:
REMINDER FREQUENCY: 6M//
RANK FREQUENCY:
USE IN RESOLUTION LOGIC: OR//
USE IN PATIENT COHORT LOGIC:
EFFECTIVE PERIOD:
EFFECTIVE DATE:
CONDITION: I V["AIMS/MHBSS (T)" Replace <--- Here is how and where to
stick in your title!

CONDITION CASE SENSITIVE:
FOUND TEXT:
AIMS EXAMINATION PN on file.
  Edit? NO//
NOT FOUND TEXT:
No AIMS examination PN found.
  Edit? NO//
```

Reminder Dialog Questions

Q: If I build a reminder dialog by autogeneration, can I also build additional dialogs to go along with that?

A: Once a reminder dialog is autogenerated, you can change or add dialog elements. The dialog elements don't need to be related to the reminder or exist as findings on the reminder.

So if you want an additional Health Factor on a dialog, you create a dialog element for the Health Factor (assuming one doesn't exist already) and then add it to the dialog

Q: If orders are included in dialogs and I check these (in the Notes tab in CPRS), are the orders actually placed, or is this just recording the intention to order something?

A: The order is actually placed, just as if you had ordered through the Orders tab. If the order is set up as a quick order, it will go through immediately (when you click the Finish button); if it's not a quick order, further questions will be asked to complete the order. The order will still need to be signed.

Q: Has anyone seen this? We have used ORQQX, the Clinical Reminders for Search parameter, to turn on the Depression and PTSD reminders at the User level for a particular user--actually a CAC. When she opens the Cover Sheet, she does not see the box with the big question mark and ringing alarm clock. When she selects a patient, she still does not get the clock box, but the GUI tells her that the reminder is being retrieved in the background. Then the reminder shows as DUE in the reminders box. She goes to the Notes Tab, starts a new note, but the Reminder Drawer is not there. The Template drawer and Encounter drawer are there, but no Reminder Drawer. All of these work fine for me. What have we missed? Is there another parameter that needs to be set? Many thanks.

A: Make sure the parameter, PXRMM GUI REMINDERS ACTIVE is set to yes, by system.

FAQs, cont'd

Q: I have two questions about Clinical Reminders.

1. We are trying to set up the Diabetic Foot Screen to require the clinician to answer with one element in each of 3 groups. I set up a group that includes three other groups. For example Foot Sensations group has 2 elements:

Sensations intact.

Sensations deficit.

Once the box for Foot Sensations has been opened, the reminder cannot be finished without one of the elements checked. The other two have been set up the same way.

5	You must select one item under each of the following: Foot Sensations, Skin Lesions or Pedal Pulses [no caption for this group]
5.1	Foot Sensations Sensations intact. Sensations deficit.
5.2	Skin Lesions Skin lesions present. No skin lesions.
5.3	Pedal Pulses Pedal pulse intact. Pedal pulse deficit.

What I want to do with the dialog is to have it so that the clinician cannot finish the reminder if he/she does not select one element in each of the 3. The only options I can find are :

1	ONE SELECTION ONLY
2	ONE OR MORE SELECTIONS
0	NO SELECTION REQUIRED

Is there another way to do this?

Q2. When a number of reminders are finished at one clinical visit, by using the "NEXT" button, we have had some of them still show as active even though the note shows they were finished and even though the reminder shows a resolution date under Clinical Maintenance. We haven't been able to get a handle on this because it is inconsistent. Some patients will have their reminders resolved. Have any of you had this problem and if so, what did you do about?

FAQs, cont'd

A: Here are the steps you must take to force a response to each question/area:

*Two key things to set are **SHOW** group and **SUPPRESS** checkbox for each of the subgroups (i.e. the exam question groups) see example below

```
DISABLE:
RESOLUTION TYPE:
FINDING ITEM:
GROUP CAPTION:
PUT A BOX AROUND THE GROUP:
SHARE COMMON PROMPTS:
MULTIPLE SELECTION: ONE SELECTION ONLY//
HIDE/SHOW GROUP: SHOW// <----- (this must be set to SHOW)
GROUP HEADER DIALOG TEXT:
PEDAL PULSES: (includes palpation of dorsalis and posterior tibial pulses
and signs/symptoms of vascular compromise like pain, pallor parathesia or
paralysis)

    Edit? NO//
GROUP HEADER ALTERNATE P/N TEXT:
    No existing text
    Edit? NO//
EXCLUDE FROM PROGRESS NOTE:
SUPPRESS CHECKBOX: SUPPRESS// <---- (this must be set to SUPPRESS)
NUMBER OF INDENTS: 2//
INDENT PROGRESS NOTE TEXT:
Select ADDITIONAL FINDINGS:
Select SEQUENCE: 2// ?
    Answer with COMPONENTS SEQUENCE, or ITEM
    Choose from:
    1     DAY PEDAL NORMAL
    2     DAY PEDAL ABNORMAL
```

A2: Try creating three different "groups" for that reminder. Each one can be set to require clicking one, or more boxes (per group).

FAQs, cont'd

Q: Has anyone created a Progress Note title to pull into a Health Summary record of outside medications and procedures? If so, what title do you suggest and how to make it work most effectively to include the data required by IM7.4?

A: Tampa is approaching this through Reminder Dialogs. I have been actively using these dialogs for about a month in my Primary care clinic. It is much easier to use the dialogs within my usual Ambulatory Care note title than it is to have to start a second note. Another advantage of using reminder dialogs: you will be capturing info that can be used to satisfy other reminders

1) Health factors for "S/P Total colectomy" and "S/P hysterectomy" can be used in the appropriate cancer screening reminders. (these are set up with resolution status "Other" since it is a condition: once you are S/P total colectomy you are always S/P Total colectomy. The date of the procedure indicated by typing date into comments rather than using a resolution status of "Done Elsewhere" and using drop down date.

2) Although HF for individual meds are not included in Outside Med dialog, the following HF were included: Outside ACE Inhibitor, Outside ASA and Outside Beta Blocker - for the IHD reminders.

NOTE: See Tampa's reminder dialog on the Reminders web page under Examples.

FAQs, cont'd

A2: We created a Progress Note Title "Outside Medications" under the DOCUMENT CLASS Clinical Warning. Clinician can then view on CWAD DISPLAY. Then created h/s called PHARMACY MEDS AND OUTSIDE MEDS and added it as a health summary on the reports tab. HS included the RXOP component and SPN COMPONENT with 3 occurrence limits. The dilemma is getting the clinician to enter a separate note, however, due to the benefits of this information for meds and herbs outside VA, clinicians are taking the time to add. Some are appending the original title instead of adding a new one. We probably need to look at that and ensure that this is okay, but it is better than what we had. Our second brainstorm was to add it as a problem to the problem list OUTSIDE MEDICATIONS (DEFAULTS TO 799.9 CODE) AND THE CLINICIAN CAN ADD comment each time med is changed or added.

Q: Can you include a reminder dialog as part of a group template or dialog template?

A: No. Reminder dialogs are stand-alone.

Q: When using the CV option of reminders dialog, we are finding that it indicates "elements may be created from within the dialog group screen" and we have been unable to enter a new element. We receive the following message and are not given the option to create a new element:

```
DIALOG ELEMENT: ?? *****
This field points to a dialog which is subordinate to this dialog.
NOTE: The parent dialog menu or one of its ancestors may not be entered
as an item.
```

A: Go into the CV option and select groups. Select the new group and use the ED option to edit. When you get to sequence prompt, type ?. If there are sequence numbers with no element names, delete them.

Q: Reminders on New Patients; This is more of a process question

The nurse sees/screens the patient before the physician and processes many of the reminders.

A new patient has no diagnosis in the computer yet and is not due for many of the reminders that are triggered by diagnosis codes. The diagnosis is not entered till the clerk does the checkout, which may be done a few days later and then the pt is due. We had a pt who was diabetic and did not have any diabetes reminders processed since they didn't show up as due so this will be a deficiency on the EPRP but more importantly the pt did not receive the exam, educations etc that they should have. To be honest, the nurses had a checklist and they were doing everything on everyone and we were trying to get them to use and rely on the clinical reminders so they are not using the checklist anymore.

Anyone have any ideas?

A1: VOLPP,BRYAN D (MAC) 23 Jan 02 18:20 12 lines

This was the one reason that the groups of reminders were first developed – you can create a category of reminders for diabetes and put them under the 'OTHER' grouping. That way when a new patient comes in, a user can go to the group of reminders and run through them. Easy access even though the reminders are not 'DUE'. The groups are also useful when something gets done before it is due - I get lab results from outside sources all the time on patients whose reminder for HbA1c or lipid panel is not yet due. The easiest access to get that data in is through the 'Other Categories'.

The only other alternative that comes to mind is for the nurse to add diabetes to the problem list and then refresh the patient's data.

A2: <GABEREL.DAVID_A@LAS-VEGAS.VA.GOV> 23 Jan 2002 15:40:18 -0800 (PST)

If the nurse knows that the patient is diabetic he/she can change their view in clinical reminders to display a folder called not applicable. (In the situation you describe the diabetic reminders would actually be applicable and the only reason they're not is because a diagnosis has not yet been entered.) In this case the nurse could open the reminder from the not applicable folder and process it as usual.

1. Click on the alarm clock or question mark to open the available reminders dialog.
2. Click on view in the upper left corner of the resulting dialog box.
3. Click on the folders you would like to have available, in this case not applicable.

Now when processing reminders from the reminders drawer the folder for not applicable is available and clicking on this folder opens it. Click on the appropriate diabetic reminder to begin processing it just as if it had been showing as due.

Mental Health Reminder Dialogs

Q: Do users have to have a key to do a CAGE? The Primary Care physician who has been working with me tried to use my CAGE Reminder and got a warning message that he was not authorized to enter CAGE results.

A: You have to make mental health dialogs active for the user or Division or service under CPRS Reminder Configuration on the manager's menu:

```
Select Reminder Managers Menu Option: cp  CPRS Reminder Configuration

Select CPRS Reminder Configuration Option: mh  Mental Health Dialogs
Active

Mental Health Active may be set for the following:
  1  User          USR  [choose from NEW PERSON]
  2  Division     DIV  [choose from INSTITUTION]
  3  System       SYS  [TAMPA.VA.GOV]
```

Q: Can anyone send me examples of their GAF and AIMS reminders and dialogs?

A: See the following web sites:

<http://vaww.mentalhealth.med.va.gov/>

<http://vaww.visn1.med.va.gov/pce/>

<http://med.va.gov/reminders>

<http://152.131.71.182/CPRSPage/VISN15REMINDERS/screensofdialogs>

Reminder Reports

Q: Can we use the reports functionality “out of the box” as soon as we install V. 1.5 (or patch 63) or do we have to define reminders first?

A: Reports can be run on the National reminders that are distributed “out of the box,” but National reminders will not include local findings so the report counts will not be correct. Once local reminders are defined and tested, you will primarily run the reports based on site-specific reminders.

FAQs, cont'd

Q: We have the following two hypertension reminders -- one for pts with DX of HTN and one for diabetics. Our goal was to write a reminder that would only be resolved when the last BP measurement in VITALS was equal to or less than 130/85 for diabetics and 140/90 for patients with DX of HTN.

The problem is, now we're running reminder due reports on these and basically they're showing that NONE of the reminders was resolved. In other words, out 3150 pts, 3150 still have the reminder due--the # applicable and due are the same consistently. I find it hard to believe we haven't resolved any of them.

How do I need to change the way the reminder is written to make this not so? Is it because I make the frequency 1d?

REMINDER DEFINITION INQUIRY	Mar 07, 2001 8:45:39 am	Page 1

CTX HYPERTENSION IN DIABETES	No. 674032	

Print Name:	Hypertension in Diabetes (P)	
Related VA-* Reminder:		
Reminder Dialog:	CTX DIABETES-ELEVATED BP	
Priority:		
Reminder Description:	Blood pressure should be measured at each office visit for all veterans who have diabetes mellitus.	
	This reminder is based on guidelines outlined in the VHA Handbook 1120.2 and VHA Clinical Guidelines for Management of Patients with Diabetes Mellitus.	
	Target Condition: Coronary Artery Disease and Stroke.	
	Target Group: All veterans with diabetes mellitus.	
	Recommendation: Measure blood pressure at each office visit for all veterans who have diabetes mellitus.	
Technical Description:	This reminder is triggered by a diagnosis of diabetes mellitus and a last recorded blood pressure measure in the Vitals package of >130/85. The reminder continues to be active as long as the last blood pressure measurement is >130/85. If the patient is not diabetic, the Health Factor PT NOT DIABETIC will resolve the reminder for one year.	

FAQs, cont'd

Baseline Frequency:

Do In Advance Time Frame: Wait until actually DUE
Sex Specific:
Ignore on N/A: Frequency for Age Range:

Findings:

Finding Item: BLOOD PRESSURE (FI(1)=VM(1))
Finding Type: VITAL MEASUREMENT
Match Frequency/Age: 1 day for all ages
Found Text: BP check due every visit for diabetic patients with BP>130/85.
Use in Patient Cohort Logic: AND
Condition: I (\$P(V,"/",1)>130)!(\$P(V,"/",2)>85)

Finding Item: DIABETES (FI(2)=TX(674022))
Finding Type: REMINDER TAXONOMY
Found Text: History of diabetes on file.
Use in Patient Cohort Logic: AND
Effective Period: 2Y

Finding Item: PT NOT DIABETIC (FI(3)=HF(674185))
Finding Type: HEALTH FACTOR
Use in Resolution Logic: OR

General Patient Cohort Found Text:

General Patient Cohort Not Found Text:

General Resolution Found Text:

General Resolution Not Found Text:

Default PATIENT COHORT LOGIC to see if the Reminder applies to a patient:
(SEX)&(AGE)&FI(1)&FI(2)

Expanded Patient Cohort Logic:
(SEX)&(AGE)&FI(BLOOD PRESSURE)&FI(DIABETES)

Default RESOLUTION LOGIC defines findings that resolve the Reminder:
FI(3)

Expanded Resolution Logic:
FI(PT NOT DIABETIC)

Web Sites:

FAQs, cont'd

REMINDER DEFINITION INQUIRY Mar 07, 2001 8:52:14 am Page 1

CTX HYPERTENSION MANAGEMENT No. 674008

Print Name: Hypertension Management (P)

Related VA-* Reminder: VA-*HYPERTENSION SCREEN

Reminder Dialog: CTX BLOOD PRESSURE CHECK

Priority:

Reminder Description:

This reminder is based on guidelines outlined in the VHA Handbook 1120.2 and the VHA Pharmacologic Management of Hypertension 1996.

Target Condition: Cardiovascular disease and stroke.

Target Group: All veterans with hypertension.

Recommendation: Achieve blood pressure levels of less than 140/90 for all veterans with hypertension.

Technical Description:

This reminder is triggered for all patients with a diagnosis of hypertension (see Taxonomy HYPERTENSION CODES) except those with an active diagnosis of diabetes (see reminder HYPERTENSION IN DIABETES MELLITUS) every visit when last recorded blood pressure in the Vitals Measurement Package is greater than 140/90.

As long as the recorded BP remains greater than 140/90, the reminder remains due. It will only be resolved when the last recorded BP is less than 140/90.

Baseline Frequency:

Do In Advance Time Frame: Wait until actually DUE

Sex Specific:

Ignore on N/A:

Frequency for Age Range: 0Y - Not Indicated for all ages

Match Text:

No Match Text:

Findings:

Finding Item: BLOOD PRESSURE (FI(3)=VM(1))

Finding Type: VITAL MEASUREMENT

Match Frequency/Age: 1 day for all ages

Found Text: Patients with DX of hypertension with BP>140/90 require BP check each visit.

FAQs, cont'd

```
Use in Patient Cohort Logic: AND
                          Condition: I ($P(V,"/",1)>140)!($P(V,"/",2)>90)

                          Finding Item: DIABETES (FI(4)=TX(674022))
                          Finding Type: REMINDER TAXONOMY
Use in Patient Cohort Logic: AND NOT
                          Effective Period: 2Y

                          Finding Item: HYPERTENSION CODES (FI(5)=TX(674043))
Finding Type: REMINDER TAXONOMY
Use in Patient Cohort Logic: AND
                          Effective Period: 2Y

General Patient Cohort Found Text:

General Patient Cohort Not Found Text:

General Resolution Found Text:

General Resolution Not Found Text:

Default PATIENT COHORT LOGIC to see if the Reminder applies to a patient:
    (SEX)&(AGE)&FI(3)&'FI(4)&FI(5)

Expanded Patient Cohort Logic:
    (SEX)&(AGE)&FI(BLOOD PRESSURE)&'FI(DIABETES)&FI(HYPERTENSION CODES)

Default RESOLUTION LOGIC defines findings that resolve the Reminder:

Expanded Resolution Logic:

Web Sites:
```

A: Your reminder looks good for display of the correct information to the provider, but you need to fix your problem for the reports.

Your first reminder is due for Diabetics whose last SBP >130 or DBP >85.

The entry in the resolution logic does not do anything - if the patient's last BP is less than 131/86 then the reminder is not applicable and the resolution is not used.

So, the real question is - what is it that you want to ask/answer with a reminder report?

FAQs, cont'd

I use almost exactly the same reminder that you have for my reminder reports (without the resolution logic). However, the output in the report shows the same number in the applicable and due column - so I use this reminder to get the number of patients whose last BP was >140/85 and who have diabetes. I use a different reminder to know how many diabetics there are in the group and what I report is the % of diabetics whose last BP was elevated.

So for lines 3 and 9, the applicable and due are the same. 38/82 diabetics had their last BP elevated and 31/82 had their last HbA1c >8.0

		# Patients with Reminders	
		Applicable	Due
		-----	---
1	Diabetes - Serum Creatinine	82	7
2	Diabetes - Hemoglobin Alc	82	14
3	Diabetic with last BP>140/85	38	38
4	Diabetes - Urine Protein	82	23
5	Diabetes - Urine Microalbumin	67	23
6	Diabetic Eye Exam	82	78
7	Diabetic Foot Exams	82	40
8	Proteinuria - Not on ACE	20	6
9	Diabetic with last HbA1c >8.0	31	31
10	Lipid Profile - High Risk Patient	82	17
11	DM LDL in past year >100	57	33

Report run on 82 patients.

If you wanted the applicable column to be all diabetics and the due column to be those whose BP was high or not done, you could rewrite the reminder. cohort: sex and age and diabetes resolution: BP <130/85

Then the reminder is due for all patients who have no BP recorded or whose last value was >=130/85. (It is possible to exclude those who have no BP in the VS if you wanted to)

Troubleshooting

Instructions on how to fix a Missing Stop Date Reminder Error: Maggie Anderson, VAMC Fargo, 701-239-3700 x3103

Subj: CLINICAL REMINDER DATA PROBLEM, INPATIENT MEDICATION [#7804082]
13 Dec 01 15:03 3 lines

Warning - Pharmacy order 90U;I, for patient DFN= 15863, is missing the stop date.
This indicates a possible data problem.

```
Global ^PS(55,15863,5,90
=====
^PS(55,15863,5,90,0) = 90^3483^1^U^0^^C^^E^^3^^2940520.1426^15863^2940520
                        = .1426^^^2940527.141415
^PS(55,15863,5,90,.1) = 761^35MG
^PS(55,15863,5,90,1,0) = ^55.07P^2^2
^PS(55,15863,5,90,1,1,0) = 7332^
^PS(55,15863,5,90,1,2,0) = 7252^3
^PS(55,15863,5,90,1,"B",7252,2) =
^PS(55,15863,5,90,1,"B",7332,1) =
^PS(55,15863,5,90,2) = QD^2940521.09^^^0900^1440
^PS(55,15863,5,90,4) = ^^58^2940520.1426^^^58^^1
^PS(55,15863,5,90,9,0) = ^55.09DA^1^1
^PS(55,15863,5,90,9,1,0) = 2980520.1426^58^22530
```

Items in Red:

90 is the Order Number (this one happens to be the same number from the email but sometimes it is not), The PS node the 4th piece should be the stop date

```
Select VA FileMan Option: Enter or Edit File Entries
INPUT TO WHAT FILE: PHARMACY PATIENT//
EDIT WHICH FIELD: ALL// UNIT DOSE      (multiple)
  EDIT WHICH UNIT DOSE SUB-FIELD: ALL//
THEN EDIT FIELD:
Select PHARMACY PATIENT NAME:      PATIENT NAME REMOVED FOR PRIVACY
      (1 note )   C: 09/09/96 17:00
                  A: Known allergies
Select ORDER NUMBER: 184873// `90 90      ORAL      CONTINUOUS
ORDER NUMBER: 90//
PRIORITY:
ORIGINAL ORDER NUMBER:
PATIENT NAME: PATIENT NAME REMOVED FOR PRIVACY//
PROVIDER: ZUKOWSKI,WOJCIECH T//
Select DISPENSE DRUG: PREDNISONE 5MG TAB UD//
DISPENSE DRUG: PREDNISONE 5MG TAB UD//
UNITS PER DOSE: 3//
INACTIVE DATE:
UNITS CALLED FOR:
UNITS ACTUALLY DISPENSED:
```

```

TOTAL RETURNS:
RETURNS:
PRE-EXCHANGE UNITS:
TOTAL EXTRA UNITS DISPENSED:
EXTRA UNITS DISPENSED:
TOTAL PRE-EXCHANGE UNITS:
Select DISPENSE DRUG:
MED ROUTE: ORAL//
TYPE: UNIT DOSE//
SELF MED: NO//
HOSPITAL SUPPLIED SELF MED:
SCHEDULE TYPE: CONTINUOUS//
SPECIAL INSTRUCTIONS:
ORIGINAL WARD:
DAY LIMIT:
DOSE LIMIT: 3//
*UNITS PER DOSE:
*PRE-EXCHANGE UNITS:
COMMENTS:
  No existing text
  Edit? NO//
VERIFYING NURSE:
DATE VERIFIED BY NURSE:
VERIFYING PHARMACIST: FISKE,MARY J//
DATE VERIFIED BY PHARMACIST: MAY 20,1994@14:26//
PHYSICIAN:
DATE VERIFIED BY PHYSICIAN:
CLERK: FISKE,MARY J//
DATE ENTERED BY CLERK:
*SOLUTION:
PREVIOUS STOP DATE/TIME:
ORDER DATE: MAY 20,1994@14:26//
LOG-IN DATE: MAY 20,1994@14:26//
STATUS: EXPIRED//
Select DATE: MAY 20,1998@14:26//
  DATE: MAY 20,1998@14:26//
  USER: 58//
  ACTION: ENTERED AS ACTIVE BY PHARMACIST//
  FIELD:
  OLD DATA:
*UNITS CALLED FOR:
STOP DATE/TIME: 052494@1500 (MAY 24, 1994@15:00) >>Enter a date after discussing
with Pharmacy ADPAC. She told me in 1994 this inpatient drug had a stop date of 3
days and she stated to enter a time of 1500.

```

Redisplaying the global after the FM edit now shows the fourth piece which is the stop date:

```

=====
=====[Session 1]=====
^PS(55,15863,5,90,2) = QD^2940521.09^^2940524.15^0900^1440

```

Clinical Reminder Data Problem, Inpatient Medication

Instructions on fixing the following error (programmer access is needed):

Maggie Anderson, VAMC Fargo, 701-239-3700 x3103

Subj: CLINICAL REMINDER DATA PROBLEM, INPATIENT MEDICATION [#7933259]

15 Jan 02 09:16 4 lines

From: POSTMASTER

Warning - Pharmacy order 84U;I, for patient DFN= 23346, is missing the dispense drug.

Orderable item: Missing

This indicates a possible data problem.

Display the global by using the patient's DFN and the Pharmacy Order Number (use just the number part of 84U;I) from the above message:

```
Select Systems Manager Menu Option: programmer Options
```

```
Global ^PS(55,23346,5,84
^PS(55,23346,5,84,0) = 245143^4983^1^U^^P^^A^^^3020114.105305^23346^302
                        = 0114.105305^^245143^^3462488;1^^10^E^76U
^PS(55,23346,5,84,.2) = 3197^30ML^^R^^
^PS(55,23346,5,84,.3) = 30ML
^PS(55,23346,5,84,1,0) = ^55.07P^1^1
^PS(55,23346,5,84,1,1,0) = ^1
^PS(55,23346,5,84,1,"B",0,1) =
^PS(55,23346,5,84,2) = BID PRN^3020114.11^^3020214.15^^
^PS(55,23346,5,84,3,0) = ^55.08^0^0
.....
....
...
```

Items highlighted in red above:

245143 is the Order Number

3197 is Pharmacy Orderable Item

$\text{^PS}(55,23346,5,84,1,1,0) = \text{^1}$ (This is the problem as the first piece is missing which is the Dispense Drug)

To find the Dispense Drug:

```
Select Pharmacy Data Management Option: Orderable Item Management
```

```
Select Orderable Item Management Option: EDIT Orderable Items
```

This option enables you to edit Orderable Item names, Formulary status, drug text, Inactive Dates, and Synonyms.

At this point enter the IEN with the grave accent(`) of the Pharmacy Orderable Item shown in the global above:

```
Select PHARMACY ORDERABLE ITEM NAME: `3197  MAGNESIUM HYDROXIDE  SUSP,ORAL

Orderable Item -> MAGNESIUM HYDROXIDE
Dosage Form    -> SUSP,ORAL

List all Drugs/Additives/Solutions tied to this Orderable Item? YES//
Orderable Item ->  MAGNESIUM HYDROXIDE
Dosage Form    ->  SUSP,ORAL
Dispense Drugs:                >>>If more than one dispense drug check with Pharmacy
ADPAC
MILK OF MAGNESIA
PHILLIP'S MILK OF MAGNESIA 12 OZ    N/F
MILK OF MAGNESIA 30ML UD    >>>This is the one the Pharmacy ADPAC states to use

Are you sure you want to edit this Orderable Item? NO//
```

Now get the IEN of the dispense drug:

```
Select Systems Manager Menu Option: FM  VA FileMan

Select VA FileMan Option: Inquire to File Entries

OUTPUT FROM WHAT FILE: PHARMACY PATIENT// 50  DRUG  (5599 entries)
Select DRUG: MILK OF MAGNESIA 30ML UD  MILK OF MAGNESIA 30ML UD
F          MILK OF MAGNESIA 30ML UD
ANOTHER ONE:
STANDARD CAPTIONED OUTPUT? Yes//  (Yes)
Include COMPUTED fields:  (N/Y/R/B): NO// BOTH Computed Fields and Record Number
(IEN)
DISPLAY AUDIT TRAIL? No//  NO

NUMBER: 5135                GENERIC NAME: MILK OF MAGNESIA 30ML UD
VA CLASSIFICATION: GA108      DEA, SPECIAL HDLG: 9
```

5135 IS THE IEN FOR THIS DISPENSE DRUG WHICH IS THE MISSING PIECE IN THE GLOBAL.

The missing piece in the global needs to be edited directly in the global:

```
Select Programmer Options Option: programmer mode

VAH>W ^PS(55,23346,5,84,1,1,0)
^1
VAH>S ^PS(55,23346,5,84,1,1,0)="5135^1"

VAH>W ^PS(55,23346,5,84,1,1,0)
5135^1
```

One more example with one dispense drug:

Subj: CLINICAL REMINDER DATA PROBLEM, INPATIENT MEDICATION [#7927306]

14 Jan 02 10:22 4 lines

Warning - Pharmacy order 67U;I, for patient DFN= 63934,
is missing the dispense drug.

Orderable item: Missing

This indicates a possible data problem.

```
^PS(55,63934,5,67,0) = 240226^6972^32^U^^R^^D^^^^^3011220.154629^63934^30
                        = 11220.154629^^240226^^3011226.132037^3413267^^3^E^3
                        = 9U
^PS(55,63934,5,67,.2) = 39^2 PUFFS^^R^^
^PS(55,63934,5,67,.3) = 2 PUFFS
^PS(55,63934,5,67,1,0) = ^55.07P^1^1
^PS(55,63934,5,67,1,1,0) = ^1^^^^^^^

Select Systems Manager Menu Option: PProgrammer Options

Select Programmer Options Option: TEST an option not in your menu
Option entry to test: EDIT ORDERABLE ITEMS  PSS EDIT ORDERABLE ITEMS      Edit Or
derable Items

This option enables you to edit Orderable Item names, Formulary status, drug text, Inactive Dates,
and Synonyms.

Select PHARMACY ORDERABLE ITEM NAME: `39  ALBUTEROL  INHALANT

      Orderable Item -> ALBUTEROL
      Dosage Form    -> INHALANT

List all Drugs/Additives/Solutions tied to this Orderable Item? YES//
Orderable Item -> ALBUTEROL
      Dosage Form    -> INHALANT

Dispense Drugs:
-----
ALBUTEROL 90MCG 200D ORAL INHL

Are you sure you want to edit this Orderable Item? NO//

Select Systems Manager Menu Option: FM  VA FileMan
Select VA FileMan Option: Inquire to File Entries

OUTPUT FROM WHAT FILE: PHARMACY PATIENT// 50  DRUG  (5599 entries)
Select DRUG: ALBUTEROL 90MCG 200D ORAL INHL  ALBUTEROL 90MCG 200D ORAL INHL
F          ALBUTEROL 90MCG 200D ORAL INHL          =CONVERT TO 90 DAYS SUPPLY
ANOTHER ONE:
STANDARD CAPTIONED OUTPUT? Yes//  (Yes)
```

Include COMPUTED fields: (N/Y/R/B): NO// BOTH Computed Fields and Record Number
(IEN)

DISPLAY AUDIT TRAIL? No// NO

NUMBER: 3769

GENERIC NAME: ALBUTEROL 90MCG 200D ORAL INHL

VA CLASSIFICATION: RE102 DEA, SPECIAL HDLG: 6

MAXIMUM DOSE PER DAY: .1

Select Systems Manager Menu Option: PProgrammer Options

Select Programmer Options Option: PProgrammer mode

VAH>W ^PS(55,63934,5,67,1,1,0)

^1^^^^^^^

VAH>S ^PS(55,63934,5,67,1,1,0)="3769^1^^^^^^^"

VAH>W ^PS(55,63934,5,67,1,1,0)

3769^1^^^^^^^

Troubleshooting Health Factor Errors

You can identify health factor errors because the routine is PXRMHF. Generally there are four possible causes of errors with health factors:

1. A health factor that is a factor does not have a category.

Solution – put the factor in a category.

2. A health factor that is a category factor has been given to a patient.

Solution – remove this health factor from the patient's record.

3. There is a bad "AA" cross-reference in the V HEALTH FACTOR file.

Solution - remove the bad cross-reference.

4. There is an entry in the V HEALTH FACTOR file that points to a non-existent visit.

Solution – remove the entry.

By looking at the error trap, you can usually tell which one of these it is. If the variable CAT is null then the error is one of the first two. The variable HFIND tells you which health factor it is. By looking at this health factor you can see if it is a factor missing a category or a category health factor given to a patient. If the variable IEN is null then there is a bad "AA" cross-reference. It will be ^AUPNVPED(DFN,"AA",HFIND,INVDATA,IEN). If the variable VIEN is null then V Health Factors entry points to a non-existent visit. The entry is ^AUPNVPED(IEN).

Example:

```
$ZE= BLDPC+17^PXRMHF:1, %DSM-E-NULLSUBSCR, Null subscript
.. S ^XTMP(PXRMDFN,"HF",CAT,INVDATA,HFIND)=IEN_U_VIEN_U_DATE
Process ID: 20603564 (543176036)
APR 17, 2000 13:51:59
Username: SCHWARTZ Process Name: SCHWARTZ
UCI/VOL: [VAH,TOU] :
$ZA: 83 $ZB: 13
Current $IO: _TNA22: Current $ZIO: Host: 10.136.245.219 Port: 1881
CPU time: 3.52 Page Faults: 496
Direct I/O: 500 Buffered I/O: 1008

$ZE= BLDPC+17^PXRMHF:1, %DSM-E-NULLSUBSCR, Null subscript
Last Global Ref: ^XTMP("PXRMDFN21542","HF","")

$ECODE=,ZNULLSUBSCR,
$ESTACK=9
$ETRAPH=D ERRHDLR^PXRMEERRH
$QUIT=0
etc.
```

PCE Data Cleanup.

One important issue for reminders is the triggering of a reminder in patients to whom it should not apply because of incorrectly or inadvertently entered data in PCE. Approaches to “cleaning up” the data so that reminders (and other packages) will function correctly are discussed below.

Approach 1: Limiting how far back a reminder looks by putting a short effective period on a taxonomy finding (18 or 24 months), or by setting an effective date after which data will be assumed to be accurate

A. Advantages

1. Easy to do
2. Limits vulnerability
3. Can be used simultaneously with other approaches

B. Disadvantages

1. Reminder may not apply when appropriate to a patient that is seen infrequently

Approach 2: Adding health factors that identify an incorrect diagnosis to change the cohort (e.g., adding a Health factor of incorrect COPD diagnosis that is used with "and not" in the cohort logic).

A. Issues:

1. How long should this health factor be effective?
2. Should you run reminder reports to look for the use of this health factor and identify someone to review the incorrect diagnoses?
3. Should this be viewable in a health summary?

Approach 3: Using a consult to review the incorrect diagnoses (e.g., creating a consult service called something like “Medical Record Review” or “Encounter Diagnosis Review”). Using a dialog, this could be ordered automatically and linked to the entry of the same health factor above.

A. Advantages

1. Creates a tracking mechanism and allows use of consult printing and tracking options to monitor entry
2. Can be combined with use of a health factor, or the orderable item

B. Disadvantages

1. Creates medical record entries that may be better left out
2. Consult service may be used inappropriately, depending on what it is called and how staff are educated.

Approach 4: Creating an orderable item for “Encounter Diagnosis Review” and using it with or in place of a Health factor:

A. Advantages:

1. Less intrusive than a consult in terms of inappropriate use
2. Still trackable by FileMan and can be set to autoprint the associated order to a specific printer
3. Could use order verification options to track
4. Could be entered in tandem with a health factor using a dialog.

B. Disadvantages

1. Setup and Maintenance
2. Customized reports may be needed

Approach 5: Adding an informational line to the reminder dialog and/or reminder that asks that E-mail be generated to a specific individual or group to correct inappropriate diagnosis

A. Advantages

1. Simple
2. No chart clutter

B. Disadvantages

1. Less effective
2. Depends on willingness to send a message, which many MDs won't bother with

Boolean Logic Primer for Clinical Reminders

Thanks to Terri Murphy, Durham VAMC, 9/26/01

1. Findings are either found/present/true for a given patient at a given time, or not (0=not found, 1=found).
2. Logic statements join a series of findings together to form an equation that is overall either true or not.
3. There are four ways to join findings in this logic statement:
 - a. AND (&): $FI(1)\&FI(2)$ means that both findings 1 and 2 must be found for this overall logic statement to be true.
 - b. OR (!): $FI(1)!FI(2)$ means that if either finding 1 or finding 2 is found, then the overall logic statement is true.
 - c. AND NOT (&'): $FI(1)\&'FI(2)$ means that finding 1 must be found and also finding 2 is not found. Both of these must occur for this overall statement to be true.
 - d. OR NOT (!'): $FI(1)!'FI(2)$ means that finding 1 must be found or finding 2 is not found. If either of these occur, the overall logic statement is true.
4. There is a default way that these logic statements are formed, done by the computer, with the findings loaded into the logic statement in the order in which they are entered into the reminder definition. The computer works from left to right to work out the logic statement. This can have unintended consequences. For example, it is not always enough to give a finding an AND to be sure that this finding has to be present for the overall logic statement to be true. For example, let's say $FI(1)$ is not found (=0), $FI(2)$ is found (=1) and $FI(3)$ is found (=1).
 - a. $FI(1)\&FI(2)!FI(3)$ would be evaluated as overall true, even though $FI(1)$ which was given an AND in the logic field is not found
5. The way around this is to do customized logic, by either changing the order of the findings in the logic statement OR by adding parentheses. The computer calculates the results of things within parentheses first, then goes back and moves from left to right; so, in the example above the outcome is changed with the addition of parentheses:
 - a. $FI(1)\&(FI(2)!FI(3))$ would be evaluated as not true because finding 1 is not found. The steps the computer takes are first: $FI(2)!FI(3)=$ true, then $FI(1)\&(true)=$ not true, because finding 1 is not found. In this case, giving $FI(1)$ in the logic field worked as intended.
6. This may be overly simplistic, but the way I think of it is to have a series of AND or AND NOTs in the cohort logic (ORs or OR NOTS can be inside parentheses) and a series of ORs in the resolution logic (ANDs, AND NOTs can be inside parentheses). This works for me, but each logic statement needs to be evaluated individually.

Appendix A: Checklist for Defining a Reminder and Dialog

- 1. Write your reminder in a narrative format.
- 2. Review national exported reminders for a prototype that closely matches your narrative.
- 3. Select a national reminder, print, and review.
- 4. Review taxonomy findings (print screen captures).
- 5. Review existing Health Factors in your local system. If new ones are needed, create them.
- 6. If the reminder is an education reminder, create A “refused” Health Factor (to be used instead of the level of understanding field as “refused.” This will ensure that reports of numbers of patients receiving an education reflect those who received education and are not received because refused.)
- 7. If new taxonomies, education topics, exams, orderable items are needed, create them.
- 8. Decide if Radiology, Lab, Mental Health, Vitals, or other findings need to be included in the reminder.
- 9. Decide which findings are to be used with Cohort logic, Resolution logic, or informational (outside exams, radiology, lab, immunization, skin tests).
 - Will orders be generated if certain health factors are positive or negative?
 - Will diagnoses or procedures be generated for Problem List or encounter capture from this dialog?
 - Will other additional findings need to be captured from the dialog?
- 10. Copy the national reminder, adding in additional findings.
- 11. Add or edit Dialog Parameters, if needed.
 - Example, Health Factor Resolution Statuses
- 12. Create the dialog, using the option Reminder Dialog (DI).

Checklist, cont'd

- 13. Add the reminder to your CPRS Cover Sheet Reminder List.
- 14. Turn on the CPRS GUI parameter, CPRS Reminder Resolution Active.
- 15. Turn on the CPRS GUI parameter, Mental Health Dialogs Active, if needed.

NOTE: Steps 14 and 15 only have to be turned on once, not every time a reminder definition and a dialog are created.

- 16. Test the reminder and dialog.
 - Test in the CPRS GUI
 - Does it look the way you want it to (headers, sequence, checkboxes, comments)?
 - Check Resolution Evaluation to see if dialog elements resolve the reminder.
 - Check Clinical Maintenance.
 - Test in a health summary.
 - Use the Reminders Test option to make sure there are no errors.
- 17. Fine-tune, as necessary.

Examples:

 - Delete the dialog element for refused Education Topic to be replaced by a Health Factor.
 - Add the Health Factor-Refused dialog element.
- 18. Deploy the reminder; in other words, add it to the appropriate places:
 - User's cover sheets
 - Health Summaries
 - Reminder Reports

Example: Creating a Reminder and Dialog incorporating the Cage Questionnaire

Example: Problem Drinking Screen Reminder Dialog

(created by Kathryn Corrigan, MD, Tampa VA Medical Center)

Reminder Resolution: Problem Drinking Screen

Patient had alcohol abuse screening at this encounter.
 Patient received alcohol abuse screening previously at another facility.
 Patient refuses CAGE screening
 CAGE (Mental Health Instrument) **Perform CAGE**

Clear Clinical Maint < Back Next > Finish Cancel

CLINICAL ACTIVITY-
Problem Drinking Screen:
CAGE (Mental Health Instrument)

Diagnoses: **SCREENING FOR ALCOHOLISM**
Mental Health: **CAGE**

Setup Steps

Options for performing each step are listed. All options are on the Reminders Definition Managers Menu [PXRMMANAGEMENTMENU].

1. Review the national exported reminders to find a prototype.
Option: List Reminder Definitions on Reminder Management Menu [PXRMMANAGEMENT]
2. Select a national reminder, VA-*PROBLEM DRINKING SCREEN. Review and print it.
Option: Inquire about Reminder Definition on Reminder Management Menu

Local Reminder incorporating Cage Questionnaire, cont'd

4. Determine the list of findings required for the new reminder.
 - a) Findings required to define the COHORT LOGIC including those that can change the age range and frequency.
 - b) Findings required to define the RESOLUTION LOGIC.
 - c) Informational findings.
5. Compare this list of findings with those that already exist on your system. If some of them do not exist, you will need to create them.
6. Review taxonomy findings (print screen captures).
Option: Inquire about Taxonomy Item on Taxonomy Management Menu
7. Review existing Health Factors in local system. If new ones are needed, create them.
Option: PCE Table Maintenance on Other Supporting Menus [PXRM OTHER SUPPORTING MENUS]
8. If the reminder is an education reminder, create “refused” Health Factors (to be used instead of the level of understanding field as “refused.” This will ensure that reports of numbers of patients receiving an education reflect those who received education and not those who refused.)
Option: Dialog Parameters on Dialog Management Menu [PXRM DIALOG MANAGEMENT]
9. If new taxonomies or findings (education topics, exams, orderable items) are needed, create them.
Option: Dialog Parameters on Dialog Management Menu [PXRM DIALOG MANAGEMENT]
10. Decide if Radiology, Lab, Mental Health, Vitals, or other findings need to be included in the reminder.
11. Decide which findings are to be used with Cohort logic, Resolution logic, or informational (outside exams, radiology, lab, immunization, skin tests).
 - a. Are there orders that would be generated if certain health factors are positive or negative?

Local Reminder incorporating Cage Questionnaire, cont'd

- b. Will diagnoses or procedures be generated for Problem List or encounter capture from this dialog?
- c. Do other additional findings need to be captured from the dialog?

12. Copy the national reminder, adding in additional findings

Option: Copy Reminder Definition on Reminder Management Menu [PXRM REMINDER MANAGEMENT]

For this reminder, the following findings were added:

HF- NON DRINKER AT LEAST 1 YR (FI(6)=HF(673106)) Resolution
LIGHT DRINKER (FI(7)=HF(673003)) Informational
MODERATE DRINKER (FI(8)=HF(35)) Informational

13. Set up Health Factor Resolution Statuses.

Option: Health Factors Resolutions on the Dialog Parameters menu on the Dialog Management Menu.

14. Autogenerate the dialog.

Option: Reminder Dialog on Dialog Management Menu

10. Add the reminder to the CPRS Cover Sheet Reminder List.

Option: CPRS Cover Sheet Reminder List CPRS Reminders Configuration Menu

Local Reminder incorporating Cage Questionnaire, cont'd

11. Check the reminder dialog in CPRS.

Option: Open CPRS GUI, go to Notes tab, select New Note, and open Reminders Drawer. TPA CAGE test should appear in Due or Applicable Reminders folders. Click on the reminder. The following dialog screen opens up.

Reminder Resolution: Problem Drinking Screen

Patient had alcohol abuse screening at this encounter.
Level of Understanding: (None selected)
Comment: _____

Patient received alcohol abuse screening previously at another facility.
Date: _____ 2000
Comment: _____
Location: _____

Patient declined alcohol abuse screening at this encounter.
Comment: _____

Alcoholism screening codes
 CAGE (Mental Health Instrument)

Clear Clinical Maint < Back Next > Finish Cancel

CLINICAL ACTIVITY-
Problem Drinking Screen:

12. Turn on the GUI parameter for Mental Health Dialogs Active

Option: Mental Health Dialogs Active on CPRS Reminders Configuration Menu

13. Fine-tuning

Option: Reminder Dialog

13a. Add the additional finding of "V" code to the CAGE dialog element.

Select CV Change View, then select Dialog Elements.

13b. Remove taxonomy, since V codes were added as additional findings to the education topic.

13c. Delete dialog for refused Education Topic, to be replaced by a Health Factor.

13d. Manually add Health Factor-Refused dialog element.

Examples: Problem Drinking Screens

Note the Perform CAGE button.

Reminder Resolution: Problem Drinking Screen

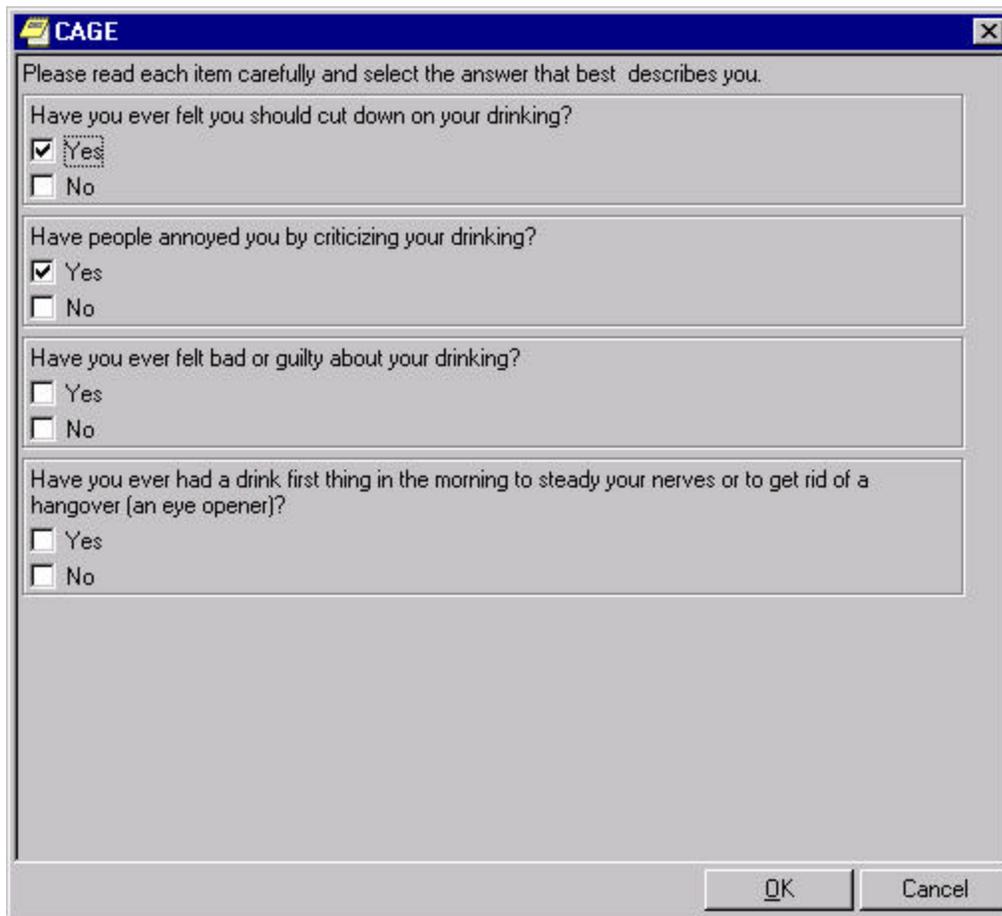
- Patient had alcohol abuse screening at this encounter.
- Patient received alcohol abuse screening previously at another facility.
- Patient refuses CAGE screening
- CAGE (Mental Health Instrument) **Perform CAGE**

Clear Clinical Maint < Back Next > Finish Cancel

CLINICAL ACTIVITY-
Problem Drinking Screen:
CAGE (Mental Health Instrument)

Diagnoses: **SCREENING FOR ALCOHOLISM**
Mental Health: **CAGE**

Example: Problem Drinking Screens – CAGE test



The image shows a software dialog box titled "CAGE". The dialog box contains the following text and options:

Please read each item carefully and select the answer that best describes you.

Have you ever felt you should cut down on your drinking?
 Yes
 No

Have people annoyed you by criticizing your drinking?
 Yes
 No

Have you ever felt bad or guilty about your drinking?
 Yes
 No

Have you ever had a drink first thing in the morning to steady your nerves or to get rid of a hangover (an eye opener)?
 Yes
 No

At the bottom right of the dialog box are two buttons: "OK" and "Cancel".

Example: Problem Drinking Screens

CAGE Results added to Progress Note

Reminder Resolution: Problem Drinking Screen

- Patient had alcohol abuse screening at this encounter.
- Patient received alcohol abuse screening previously at another facility.
- Patient refuses CAGE screening
- CAGE (Mental Health Instrument) **Perform CAGE**

Clear Clinical Maint < Back Next > Finish Cancel

CLINICAL ACTIVITY-
Problem Drinking Screen:
CAGE (Mental Health Instrument)
An alcohol screening test (CAGE) was positive (score=2)

Diagnoses: **SCREENING FOR ALCOHOLISM**
Mental Health: **CAGE**

Appendix B: Clinical Reminder Menu and Options

The options on the Clinical Reminders Management Menu help you set up and maintain Clinical Reminders.

```
Clinical Reminders Management Menu [PXRM MANAGEMENT MENU]
  CF  Reminder Computed Finding Management ... [PXRM CF MANAGEMENT]
      CRL  Computed Finding List
      CFE  Computed Finding Edit
  RM  Reminder Definition Management ... [PXRM REMINDER MANAGEMENT]
      RL  List Reminder Definitions
      RI  Inquire about Reminder Definition
      RE  Add/Edit Reminder Definition
      RC  Copy Reminder Definition
      RA  Activate/Inactivate Reminders
  SM  Reminder Sponsor Management [PXRM SPONSOR MANAGEMENT]
      SE  Enter/Edit Reminder Sponsor
      SL  List Reminder Sponsors
  TXM Reminder Taxonomy Management ... [PXRM TAXONOMY MANAGEMENT]
      TL  List Taxonomy Definitions
      TI  Inquire about Taxonomy Item
      TE  Edit Taxonomy Item
      TC  Copy Taxonomy Item
  TRM Reminder Term Management ... [PXRM TERM MANAGEMENT]
      TL  List Reminder Terms
      TI  Inquire about Reminder Term
      TE  Reminder Term Edit
      TC  Copy Reminder Term
  RX  Reminder Exchange [PXRM REMINDER EXCHANGE]
  RT  Reminder Test [PXRM REMINDER TEST]
  OS  Other Supporting Menus ... [PXRM OTHER SUPPORTING MENUS]
      TM  PCE Table Maintenance ...
      PC  PCE Coordinator Menu ...
      HS  Health Summary Coordinator's Menu ...
      EF  Print Blank Encounter Forms ...
      QO  Enter/edit quick orders
  INFO Reminder Information Only Menu ... [PXRM INFO]
      RL  List Reminder Definitions
      RI  Inquire about Reminder Definition
      TL  List Taxonomy Definitions
      TI  Inquire about Taxonomy Item
      TRL  List Reminder Terms
      TRI  Inquire about Reminder Term
      SL  List Reminder Sponsors
  DM  Reminder Dialog Management ... [PXRM DIALOG MANAGEMENT]
      DP  Dialog Parameters ...
      DI  Reminder Dialogs
```

Clinical Reminders Management Menu, cont'd

CP	CPRS Reminder Configuration [PXRМ GUI MANAGEMENT]
CA	Add/Edit Reminder Categories
CL	CPRS Lookup Categories
CS	CPRS Cover Sheet Reminder List
MH	Mental Health Dialogs Active
PN	Progress Note Headers
RA	Reminder GUI Resolution Active
DL	Default Outside Location
PT	Position Reminder Text at Cursor
NP	New Reminder Parameters
RP	Reminder Reports ... [PXRМ REMINDER REPORTS]
D	Reminders Due Report
T	Extract EPI Totals
E	Extract EPI List by Finding and SSN

Reminder Managers Menu Descriptions

Synonym	Option	Option Name	Description
CF	Reminder Computed Finding Management	PXRM CF MANAGEMENT	The options on this menu provide tools for management of reminder computed findings.
RM	Reminder Definition Management	PXRM REMINDER MANAGEMENT	The options on this menu are used for displaying, creating, editing, copying, and activating reminder definitions.
SM	Reminder Sponsor Management	PXRM SPONSOR MANAGEMENT	The options on this menu are used for displaying, creating, and editing sponsors for reminders
TXM	Taxonomy Management	PXRM TAXONOMY MANAGEMENT	The options on this menu are used for displaying, creating, editing, copying, and activating reminder taxonomies.
TRM	Reminder Term Management	PXRM TERM MANAGEMENT	Reminders can use terms as well as individual findings. The options on this menu allow you add, edit, and display reminder terms.
RX	Reminder Exchange	PXRM REMINDER EXCHANGE	This option allows sites to exchange reminder definitions via MailMan messages and host files.
RT	Reminder Test	PXRM TEST	This option lets you test your reminder definition before activating it, to ensure that it works correctly.
OS	Other Supporting Menus	PXRM OTHER SUPPORTING MENUS	The options to maintain reminder categories are in the menu Other Supporting Menus. This menu also contains menus from other packages that are related to clinical reminders, such as PCE Table Maintenance, Health Summary Coordinator's Menu, and Encounter Forms.
IN	Reminder Information Only Menu	PXRM INFO ONLY	Provides information only options for users who need information about reminders but do not need the ability to make changes.
DM	Dialog Management	PXRM DIALOG MANAGEMENT	This menu contains options for setting reminders and reminder dialogs up for the CPRS GUI.
CP	CPRS Reminder Configuration	PXRM CPRS CONFIGURATION	This menu allows for maintenance of the parameters used by CPRS for reminder processing
RP	Reminder Reports	PXRM REMINDER REPORTS	This is a menu of Clinical Reminder reports that clinicians can use for summary and detailed level information about patients' reminders that are due and satisfied.

Recommended Menu Assignment

Menu	Assignment	Purpose
Clinical Reminders Management Menu [PXRM MANAGEMENT MENU]	<ul style="list-style-type: none"> • Clinical Reminders Managers • Clinical Application Coordinators • IRM clinical reminder support staff 	Anyone who needs to define or edit reminders and dialogs. NOTE: Users who were assigned the old reminder management menu will automatically be updated to the new menu.
Other Supporting Menus [PXRM OTHER SUPPORTING MENUS]	<ul style="list-style-type: none"> • Clinical Reminders Managers • Clinical Application Coordinators • IRM clinical reminder support staff 	This menu contains menus and options from other VISTA packages, to provide easier access to related tools for setting up and maintaining clinical reminders. Use caution in assigning these menus, as they also contain options that should only be used by coordinators of those packages.
Information Only Menu [PXRM INFO]	<ul style="list-style-type: none"> • Clinicians • Quality Assurance personnel 	Anyone who needs to look up (but not define or edit) reminder information

NOTE: the Clinical Reminder Management Menu contains Other Supporting Menus, which contains the Health Summary option GMTS COORDINATOR. When making the Clinical Reminder option assignment, consider the assignment of the GMTS COORDINATOR menu option as a separate issue, leaving it or removing it from the Clinical Reminder menu as desired.

Reminder Information Only Menu

This menu contains options for users who need information about reminders, but do not need the ability to make changes. Most of the options are described previously in this manual.

Synonym	Option	Option Name	Description
RL	List Reminder Definitions	PXRM DEFINITION LIST	This option provides a brief summary of selected Clinical Reminder definitions.
RI	Inquire about Reminder Definition	PXRM DEFINITION INQUIRY	Allows a user to display a clinical reminder definition in an easy to read format.
TXL	List Taxonomy Definitions	PXRM TAXONOMY LIST	This option lists the current definitions of all the taxonomies defined in the REMINDER TAXONOMY file. The REMINDER TAXONOMY file is used to define a range of coded values from ICD Diagnosis codes, ICD Operation/ Procedures codes, and CPT codes that can be viewed as being part of a clinical category (taxonomy). Each entry has a low value and a high value. The software will search for matches on all the codes between the low and high values inclusive. If there is a match then the taxonomy finding will be true for the patient.
TXI	Inquire about Taxonomy Item	PXRM TAXONOMY INQUIRY	This option provides a detailed report of a Taxonomy item's definition, with a list of the actual ICD codes that will meet the taxonomy definition from the ICD DIAGNOSIS and ICD OPERATION/ PROCEDURE files
TRL	List Reminder Terms	PXRM TERM LIST	This option is used to give a brief listing of reminder terms.
TR	Inquire about Reminder Term	PXRM TERM INQUIRY	This option allows a user to display the contents of a reminder term in an easy to read format.
SL	List Reminder Sponsors	PXRM SPONSOR LIST	This option is used to get a list of Reminder Sponsors.

Other Supporting Menus

This menu and its options are included on the Clinical Reminders Manager Menu to provide easier access to related tools from other **VISTA** packages for setting up and maintaining clinical reminders.

Synonym	Option	Option Name	Description
TM	PCE Table Maintenance	PXTT TABLE MAINTENANCE	The options on this menu are used to add or edit the clinical terminology used to represent types of data to be collected by PCE such as Health Factors, Patient Education, Immunizations, Skin Tests, etc.
PC	PCE Coordinator Menu	PX PCE COORDINATOR MENU	This menu for PCE ADPACS includes all of the user interface options as well as the options for file maintenance.
HS	Health Summary Coordinator's Menu	GMTS COORDINATOR	<p>This menu includes options for creating Health Summaries, Health Summary Types, and the option to set parameters for nightly batch printing of Health Summaries by Location.</p> <p>NOTE: When making Clinical Reminder option assignments, consider the assignment of the GMTS COORDINATOR menu option as a separate issue, leaving it or removing it from the Clinical Reminder menu as desired.</p>
EF	Print Blank Encounter Form	IBDF PRINT BLNK ENCOUNTER FORM	This option allows the user to select a clinic, and if an encounter form is defined for use with an embossed patient card, the form will be printed.
QO	Enter/edit quick orders	ORCM QUICK ORDERS	This option lets you create or change quick orders.

Appendix C: Diagrams for Creating Reminders—Feedback Loop

Thanks to David Reagan, MD, ACOS/AC, Mountain Home VAMC, for the diagrams on the following pages.

**Feedback Loop: Does the Reminder Dialog help to answer the Clinical Question.
(Reminder Reports, User Feedback, Performance Standards, Changes in Clinical Practice)**

How can I identify my patients who need improved glycemic control?

Begin with the end in mind

What patient care issue/problem needs to be addressed? Example: Long term complications of diabetes are dependent on glycemic control, but it's hard to keep up with glycemic control for every patient.
What can be done about the issue? The best single measure of glycemic control is HgbA1c, which should be checked at least annually.
Who is at risk? Patients with diabetes of any age or any sex.
When should HgbA1c be ordered? If the patient is being seen within 3 months of the HgbA1c anniversary, ordering should be considered.

Consider the tools at hand

What tools in VISTA/CPRS can help remind a provider to accomplish annual Hemoglobin A1c screening in diabetes?
 - CPRS accesses medical information rapidly
 - Types of readily available information include previous diagnoses, laboratory results, medications orderable items
 - Ordering can be expedited by using quick orders for labs, consults and other items
 - Information that is not usually captured can be retained using Health Factors (a type of user defined

Technical terms and features: key definitions

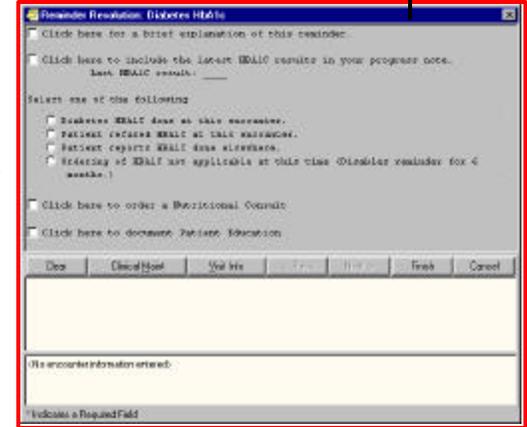
FINDINGS are used to determine the logic that is followed in - defining patients about whom we want to be reminded (**COHORT FINDINGS**)
 - locating information which shows the reminder has been taken care of (**RESOLUTION FINDINGS**)
 Examples of findings include: diagnoses (**TAXONOMIES**), lab tests, medications, vital signs,

Clinical Reminder

HF 1-DIABETES HBA1C DONE AT THIS ENCOUNTER
 HF 1-DIABETES HBA1C NON-APPLICABLE
 HF 1-DIABETES HBA1C OUTSIDE RESULTS
 HF 1-DIABETES HBA1C REFUSED
 LT HEMOGLOBIN A1C
 TX 01-Diabetes Codes

Select FINDING:
 Select one of the following:
 A All reminder details
 G General
 B Baseline Frequency
 F Findings
 L Logic

Reminder Dialog



Define the RESOLUTION logic

Specify the FINDINGS which **RESOLVE** the reminder:
 - include all medically reasonable means to resolve the reminder
 - specify how long each FINDING will resolve the reminder
 - specify the **BOOLEAN LOGIC** needed to allow the necessary FINDINGS to work together to **RESOLVE** the reminder

Define the COHORT logic

Specify the FINDING(s) which define the patient cohort:
 -each FINDING which is needed to define the patient cohort (e.g. taxonomy, lab item, medication, or other) have alternate age and/or sex requirements (e.g. PSA or colon cancer screening, mammography)
 - Specify the logic needed to allow the necessary FINDINGS to work together to select patients (age, sex and FINDINGS controlled by **BOOLEAN LOGIC**)

Define the baseline parameters

In order to make a reminder, you must specify each of the following:
 -how long prior to the time the reminder is really due do you want to be reminded that the patient is about to need the intervention (**DUE IN ADVANCE**, e.g. 3 months)
 - is the care clinical issue in this reminder age and/or sex-specific?
 - how often should the patient receive the intervention (**REMINDER FREQUENCY** e.g. HgbA1c at least

Begin with the end in mind, part II

Key features of a good dialog:
 - Resolves the reminder comprehensively & efficiently
 - Intuitive (user friendly)
 - Expedites medical decision making
 - Guides patient education
 - Presents options such as access to orders, consults...

Consider the formatting options

Dialog boxes have special features, including:
 - **ELEMENTS** can appear in any specified order
 - **RESOLUTION FINDINGS** can be grouped and tagged as required
 - **OBJECTS** can pull relevant information to the dialog
 - **HEADERS** can assist in navigation of the items
 - Other formatting options (e.g. check boxes, radio buttons, hidden text, indentation of text, template fields...)

Thoroughly TEST, then implement

- **TEST** the dialog box to be sure each element and group works properly
 - Implement the reminder for **PILOT USERS**; then evaluate reliability, validity and ease of use

Build the dialog

- Place each element and/or group in an intuitive sequence
 -**LINK** the dialog to the reminder
 -Confirm that the appearance is as desired

Create the components of the Dialog

- Build any needed **QUICK ORDERS** (for labs, consults, etc.), **OBJECTS** (e.g. for HgbA1c), **ELEMENTS** (e.g. patient refused) and template fields.
 - Create each group needed for the Dialog by associating any elements which are related

Feedback Loop: Does the Reminder Dialog help to answer the Clinical Question?

How can I identify my patients who need improved glycemic control?

Begin with the end in mind

What patient care issue/problem needs to be addressed? Example: Long-term complications of diabetes are dependent on glycemic control, but it's hard to keep up with glycemic control for every patient.

What can be done about the issue? The best single measure of glycemic control is HgbA1c, which should be checked at least annually.

Who is at risk? Patients with diabetes of any age or any sex.

When should HgbA1c be ordered? If the patient is being seen within 3 months of the HgbA1c anniversary, ordering should be considered.

What is the role of each team member in delivering the desired care? Consider documentation,



Consider the tools at hand

What tools in VISTA/CPRS can help remind a provider to accomplish annual Hemoglobin A1c screening in diabetes?

- CPRS accesses medical information rapidly
- Types of readily available information include previous diagnoses, laboratory results, medications orderable items
- Ordering can be expedited by using quick orders for labs, consults and other items
- Information that is not usually captured can be retained using Health Factors (a type of user defined information field)
- Reminder Reports provide aggregate data (e.g. workload)



Technical terms and features: key definitions

FINDINGS are used to determine the logic that is followed in - defining patients about whom we want to be reminded (**COHORT FINDINGS**)

- locating information which shows the reminder has been taken care of (**RESOLUTION FINDINGS**)

Examples of findings include: diagnoses (**TAXONOMIES**), lab tests, medications, vital signs, or

Define the baseline parameters

In order to make a reminder, you must specify each of the following:

- How long prior to the time the reminder is really due do you want to be reminded that the patient is about to need the intervention (**DUE IN ADVANCE**, e.g. 3 months)
- Is the core clinical issue in this reminder age and/or sex-specific?
- How often should the patient receive the intervention? (**REMINDER FREQUENCY**, e.g. HgbA1c at least annually)

Define the COHORT logic

Specify the FINDING(s) that define the patient cohort:

- Each FINDING that is needed to define the patient cohort (e.g. taxonomy, lab item, medication, or other) have alternate age and/or sex requirements (e.g. PSA or colon cancer screening, mammography)
- Specify the logic needed to allow the necessary FINDINGS to work together to select patients (age, sex and FINDINGS controlled by **BOOLEAN LOGIC**)

Define the RESOLUTION logic

Specify the FINDINGS which **RESOLVE** the reminder:

- Include all medically reasonable means to resolve the reminder
- Specify how long each FINDING will resolve the reminder
- Specify the **BOOLEAN LOGIC** needed to allow the necessary FINDINGS to work together to **RESOLVE** the reminder
- **TEST** to be sure the reminder actually identifies patients known to have diabetes and

HF 1-DIABETES HBA1C DONE AT THIS ENCOUNTER
HF 1-DIABETES HBA1C NON-APPLICABLE
HF 1-DIABETES HBA1C OUTSIDE RESULTS
HF 1-DIABETES HBA1C REFUSED
LT HEMOGLOBIN A1C
TX 01-Diabetes Codes

Select FINDING:

Select one of the following:

- A All reminder details**
- G General**
- B Baseline Frequency**
- F Findings**
- L Logic**
- D Reminder Dialog**
- W Web Addresses**

Reminder Dialog

Begin with the end in mind, part II

Reminder Resolution: Diabetes HbA1c

Click here for a brief explanation of this reminder.

Click here to include the latest HbA1c results in your progress note.
Last HbA1c result: _____

Select one of the following

Diabetes HbA1c done at this encounter.
 Patient refused HbA1c at this encounter.
 Patient reports HbA1c done elsewhere.
 Ordering of HbA1c not applicable at this time (Disables reminder for 6 months.)

Click here to order a Nutritional Consult

Click here to document Patient Education

Clear Clinical Maint Visit Info < Back Next > Finish Cancel

<No encounter information entered>

* Indicates a Required Field

Key features of a good dialog

- Resolves the reminder comprehensively & efficiently
- Intuitive (user-friendly)
- Expedites medical decision-making
- Guides patient education
- Presents options such as access to orders, consults...
- Facilitates thorough documentation (PCE, notes, patient education)



Consider the formatting options

Dialog boxes have special features, including:

- **ELEMENTS** can appear in any specified order
- **RESOLUTION FINDINGS** can be grouped and tagged as required
- **OBJECTS** can pull relevant information to the dialog
- **HEADERS** can assist in navigation of the items

Other formatting options (e.g. check boxes, radio buttons, hidden text, indentation of text, template fields...)

IV.

Create the components of the Dialog

- Build any needed **QUICK ORDERS** (for labs, consults, etc.), **OBJECTS** (e.g. for HgbA1c), **ELEMENTS** (e.g. patient refused) and template fields.
- Create each group needed for the Dialog by associating any elements which are related

Build the dialog

- Place each element and/or group in an intuitive sequence
- **LINK** the dialog to the reminder
- Confirm that the appearance is as desired

Thoroughly TEST, then implement

- **TEST** the dialog box to be sure each element and group works properly
- Implement the reminder for **PILOT USERS**; then evaluate reliability, validity, and ease of use
- Implement the reminder for applicable users; then evaluate reliability,

The screenshot shows a dialog box titled "Reminder Resolution: Diabetes HbA1c". It contains several options and a radio button group. The options are:

- Click here for a brief explanation of this reminder.
- Click here to include the latest HbA1C results in your progress note. Last HbA1C result: ____
- Select one of the following:
 - Diabetes HbA1C done at this encounter.
 - Patient refused HbA1C at this encounter.
 - Patient reports HbA1C done elsewhere.
 - Ordering of HbA1C not applicable at this time (Disables reminder for 6 months.)
- Click here to order a Nutritional Consult
- Click here to document Patient Education

At the bottom, there are buttons: Clear, Clinical Maint, Visit Info, < Back, Next >, Finish, and Cancel. Below the buttons is a text area containing "<No encounter information entered>". At the very bottom, there is a small note: "* Indicates a Required Field".

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