



CAPRI CPWM User Guide

Compensation & Pension Record Interchange (CAPRI)

C&P Worksheet Module (CPWM)

Patch DVBA*2.7*53

April 2004

Department of Veterans Affairs
Health Systems Design & Development (HSD&D)

Table of Contents

Overview-----	1
User Setup -----	1
Logging On -----	2
Unsigned Worksheets Notification -----	3
Documents Requiring Review Notification -----	3
Patient Selection -----	4
C&P Exams Tab -----	5
C&P Worksheets Tab -----	6
New Worksheets -----	7
Unsigned Worksheets -----	11
Site Considerations: Review Functionality -----	13

Overview

This project converts the current AMIE C&P exam worksheets to an electronic format that will upload exam results into TIU and make the results visible to CPRS users. The Compensation and Pension Worksheet Module (CPWM) will be a component of the currently deployed CAPRI GUI application. Modifications to the CAPRI patient display will allow users to launch CPWM and gain access to the new templates via a new C&P Worksheets tab. A parameter has been added to VistA so that the C&P Worksheets tab will be visible only to those who need to use its functionality. Phase I of this project, DVBA*2.7*53, encompasses the release of the CPWM application along with a number of the more commonly used exams. The remaining exams will be released periodically over FY 04 during Phase II of the project.

User Setup

To activate CPWM for a particular user, several keys must be assigned.

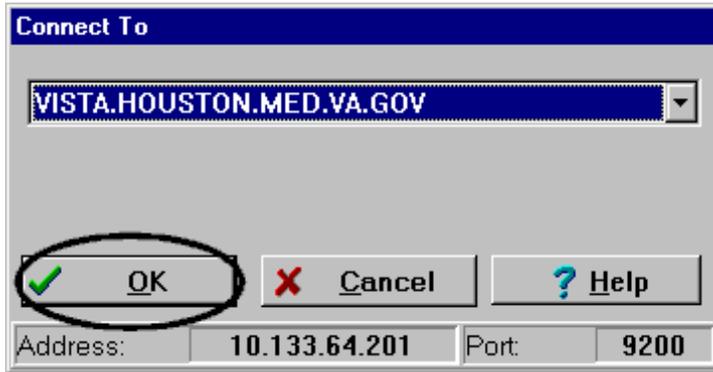
1. DVBAB CAPRI GUI – This is the option context to the main CAPRI application. All CAPRI users will get this key.
2. DVBAB CAPRI WORKSHEET TAB – This key makes the C&P Worksheets tab visible inside CAPRI. All VHA CAPRI users should get this key.
3. **ONE** of the following keys must be assigned for anyone who will be creating new C&P exam templates with CPWM.
 - a. DVBAB CPWM DISALLOW REVIEW – User doesn't need their documents reviewed prior to release.
 - b. DVBAB CPWM OPTIONAL REVIEW – User can choose to send some documents for review and not other documents.
 - c. DVBAB CPWM REQUIRE REVIEW – User must have all documents reviewed by a reviewer prior to upload.
4. **OPTIONAL** Key – If the site chooses to use the review process, users designated as a reviewer must be assigned the DVBAB CPWM REVIEWER key

IRM will need to coordinate with the C&P clinic to determine what keys a user should receive. The majority of users will need 3 new keys. The reviewer type user will need 4 keys.

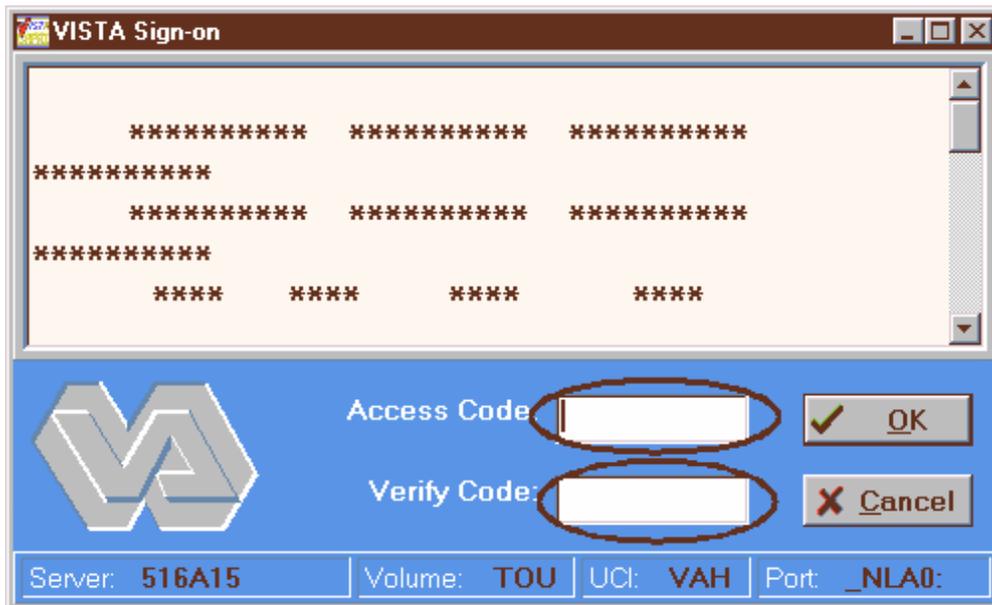
Logging On

Access requires that the proper security keys have been previously assigned.

Step 1 - Double click the CAPRI icon from your desktop.



Step 2 - If you have access to only one VHA facility, skip this Step. If you work with multiple VHA sites, scroll to the name of the VHA facility you wish to connect to, click to select it, and click the *OK* button.



Step 3 - Fill in your VistA Access Code, press the Tab key, then fill in your Verify Code and press Enter or click the *OK* button. (Please note the access and verify codes are the same as you use for AMIE II.)

Unsigned Worksheets Notification

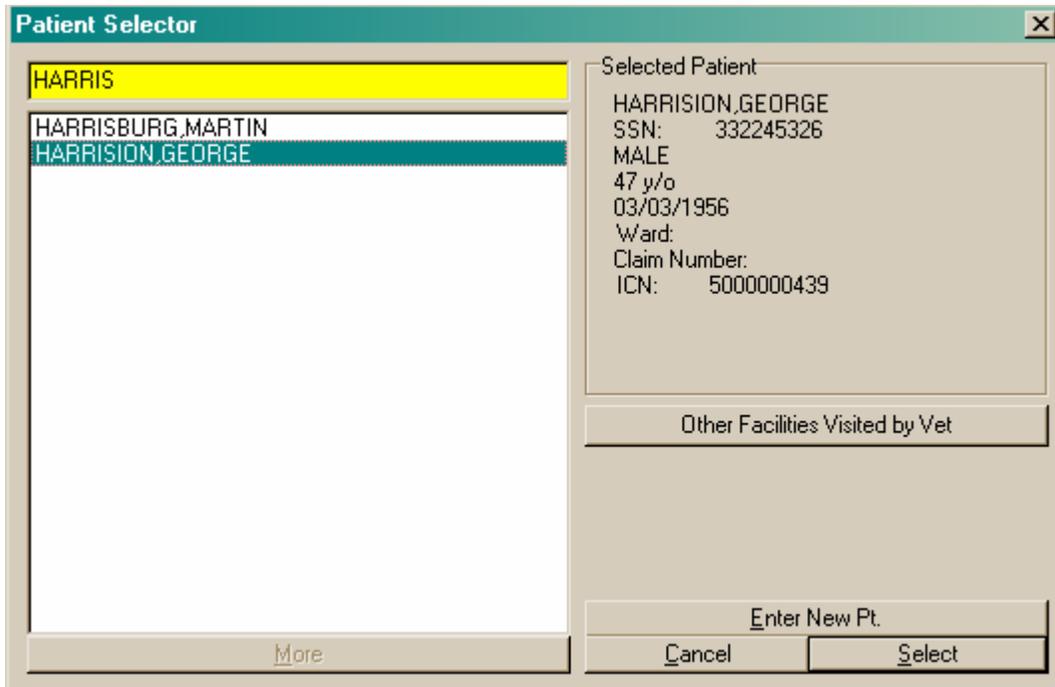
If you have unsigned worksheets you will be given the opportunity to sign them once logged on. See the Unsigned Worksheets section of this guide for instructions, if necessary.

Documents Requiring Review Notification

See the Site Considerations: Review Functionality section of this guide if you receive the Documents Requiring Review notification when logging on.

Patient Selection

Note: When using CAPRI Remote Version, and the remote site is detected by MPI, the *Other Facilities Visited by Vet* button will allow you to select a remote site and switch to that site.



Select the patient by one of the following search methods.

- Type in the patient's social security number and click the *Select* button (preferred method).
- Type in the last name initial and last four of SSN and click *Select*.
- Type in last name,first name and click the *Select* button (note no space between the comma and the first name).

Depending on your search method, a list of possible matches may appear. Single click on the patient's name and information will be displayed to help you verify that you have selected the correct patient. If there is only one match, this information will automatically display. Once you have the correct patient, click the *Select* button.

If you wish to select another patient, choose File/Select Patient from the drop down menu.

C&P Exams Tab

HARRISION,GEORGE SSN#332245326		ICN: 5000000439
C&P Exams	7131 Request	Reports
Admin	Health Summaries	Clinical Documents
C&P Worksheets		
Exam Requests:		
Date Requested/Date Completed		
JUL 17, 2003@09:33		
NOV 13, 2003@10:08		
Add a New Request		
Re-Print Final C&P Results	Status Inquiry	View/Edit Selected Request

The C&P Exams Tab displays a list of C&P examination requests that have been entered into the system for the selected patient. Select the exam request that you wish to associate this worksheet with. If you wish to view the exam request, click on the desired request and then click the *View/Edit Selected Request* button. Otherwise, click on the C&P Worksheets tab.

C&P Worksheets Tab

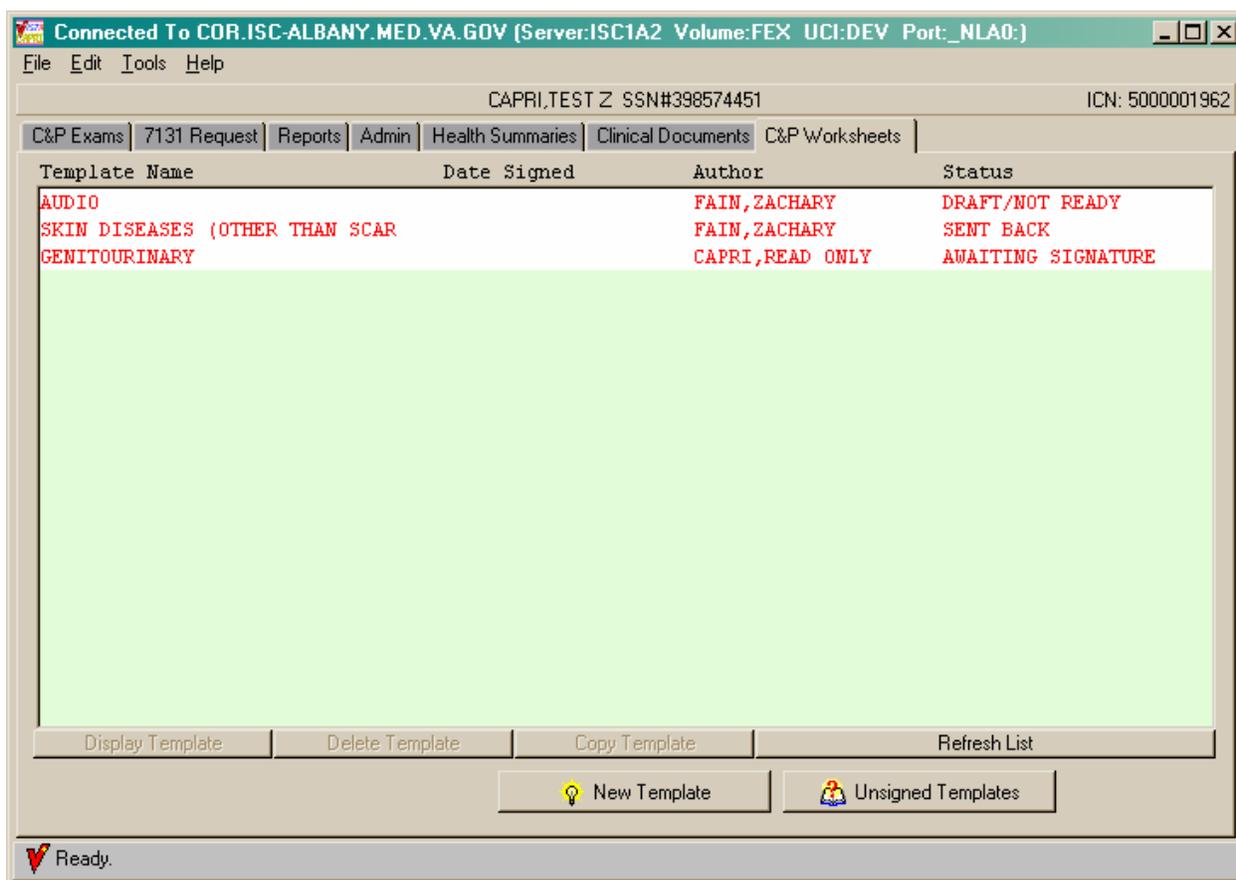
The C&P Worksheets tab contains a list of open worksheets for the selected patient, if any exist. Information provided includes template (worksheet) name, author, worksheet status, and the date the worksheet data was sent to CPRS (where applicable). Statuses include the following.

Draft/Not Ready - worksheet has been started but not completed.

Review Pending - worksheet has been sent for review.

Sent Back - worksheet has been sent back to the clinician by the reviewer for changes.

Complete - worksheet has been completed and the data sent to CPRS on the date shown.



Existing Worksheet

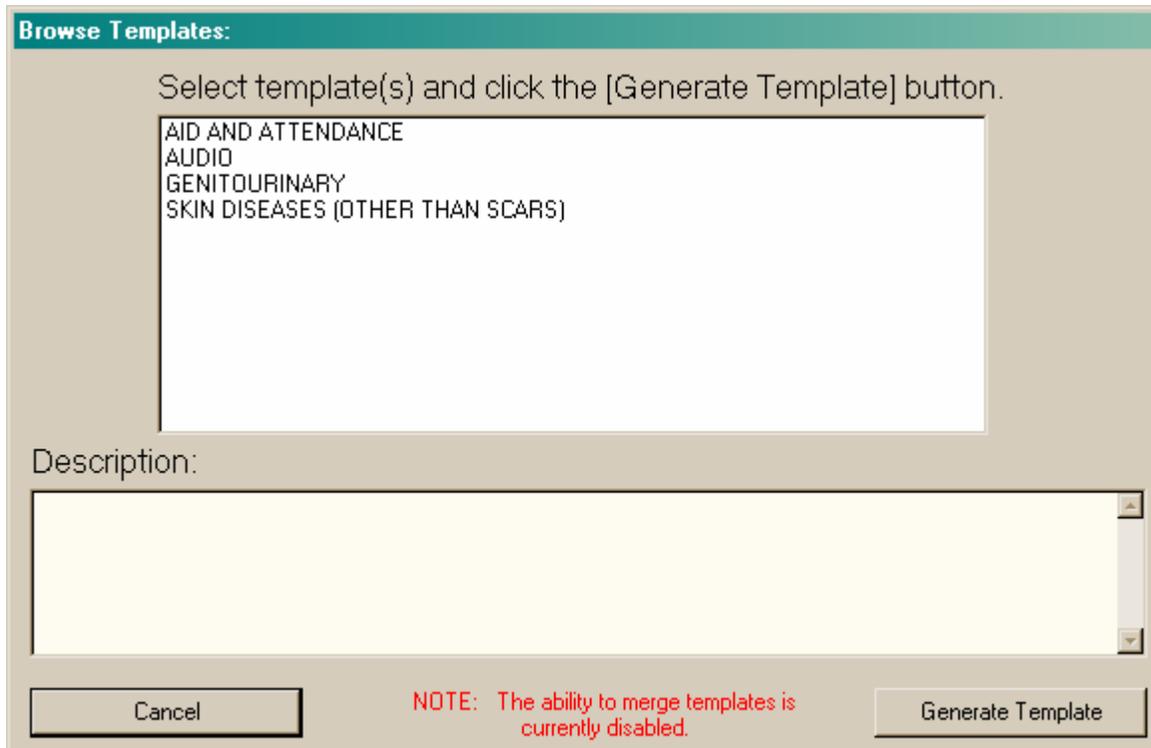
Select the existing worksheet you wish to work on. The *Display Template* button will become enabled. Click on that button and the template will be displayed. Then follow the instructions for New Worksheets starting with Step 2.

New Worksheet

If you wish to create a new worksheet, click the *New Template* button. (You must have the required security key to create a new worksheet).

New Worksheets

The Browse Templates screen appears.



Browse Templates:

Select template(s) and click the [Generate Template] button.

- AID AND ATTENDANCE
- AUDIO
- GENITOURINARY
- SKIN DISEASES (OTHER THAN SCARS)

Description:

Cancel **NOTE: The ability to merge templates is currently disabled.** Generate Template

Step 1 - You may select a single template or multiple templates. If you select multiple templates, the system will merge the selected forms and exclude duplicate items. Once you have selected the desired template/s, click the *Generate Template* button.

The screenshot shows a software window titled "AUDIO". At the top, there are fields for "Author: BAILEY, CORINNE", "Patient: HARRISON, GEORGE", "Date Updated: NEW FORM", "Transcriber:", and "SSN: 332245326". Below this is a navigation bar with tabs: "History", "Physical Exam", "Tests", "Dx/Opinion", and "Misc". The main area contains a large text box with the following text: "An examination of hearing impairment must be conducted by a state-licensed audiologist and must include a controlled speech discrimination test (specifically, the Maryland CNC recording) and a pure tone audiometry test in a sound isolated booth that meets American". Below the text box are two radio buttons: "Claims file was:" with options "Reviewed" and "Not Reviewed". There is also a "Review of Medical Records:" section with an empty text box. Below that are "Chief Complaint:" and "Situation of Greatest Difficulty:" sections, each with an empty text box. At the bottom of the window are buttons: "Close", "Preview Note", "Save to VistA", "Send for Review", and "Done!".

Step 2 - Enter data on the form by clicking on the tabs and completing the fields. Tabs and fields will be specific to the selected templates. If there are required fields on the template and they are not completed, you will be so notified. If you wish to review what you have entered at any time, click the *Preview Note* button. It should be noted that the data is automatically saved by the system every 5 minutes.

If for some reason you are unable to complete the entire worksheet, you may use the *Save to VistA* button to save the data you have entered and the *Close* button to return to the C&P Worksheets tab. Then select File/Quit from the drop-down menu to exit the system.

Some sites require the exam be sent to a reviewer when complete. Depending on the site, the *Send for Review* and *Done* buttons may appear as listed below. If the user has been designated as a reviewer, the *Send for Review* button will read as *Review Events*. See the Site Considerations: Review Functionality section of this guide for further explanation of the review process.

- No review process - *Done* will be active, *Send for Review* will be deactivated.
- Review process optional - *Done* will be active, *Send for Review* will be active.
- Review process required - *Done* will be inactive, *Send for Review* will be active.

When you have completed the worksheet, click the *Done* button.

Signature Validation [X]

SELECT APPOINTMENT: [Empty Box]

OR

SELECT ADMISSION:
MAY 21, 2003@07:55 11CP SURG
MAY 15, 2003@11:00 11CP SURG

TITLE: [C&P EXAM]

DATE OF EXAM: [Mar] [23] [2004] [..]

EXPECTED COSIGNER: (Optional) [Empty Box]

EXAMINING PROVIDER: [FAIN ZACHARY]

EXAM LOCATION: [Clinic]

ELECTRONIC SIG. CODE: [*****]

AMIE EXAM TO COMPLETE:

Requests Available:	Open Exams:
MAR 24, 2004@08:43	AID AND ATTENDANCE OR HOUSEBOUND EXAMINATION [OPEN]
[Empty Box]	AMPUTATION, RESIDUALS OF [OPEN]
	ARRHYTHMIAS [OPEN]
	ARTERIES, VEINS AND MISCELLANEOUS [OPEN]

(Multiple exams can be selected for closure.)

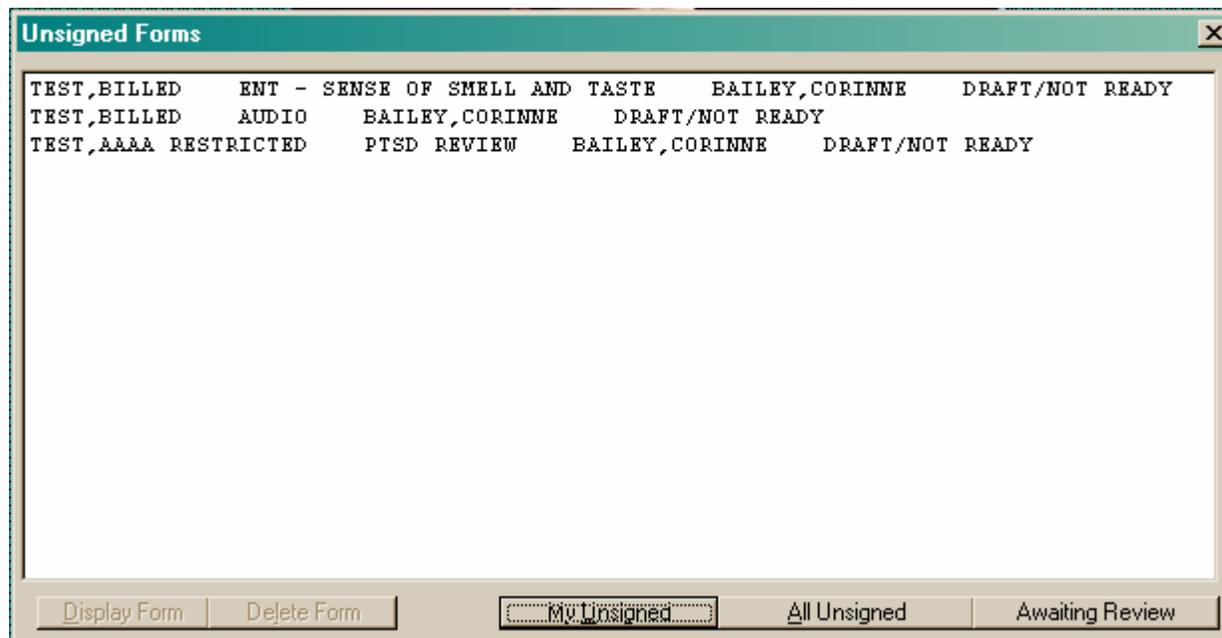
[Cancel] [OK]

Step 5 - Select the correct request under "Requests Available". A list of the open exams for that request will be displayed. (Note that all open exams must be cancelled or completed before release of the report can occur.) Complete all the other fields and enter your electronic signature code. Selecting YES in the "Release Report to AMIE" field will release the report to the Regional Office. Selecting NO will release the report to AMIE and a clerk will have to go into AMIE and release the report to the Regional Office manually. Click the *OK* button to complete the process.

Select another patient or exit the system.

Unsigned Worksheets

If you answered YES to the Unsigned Forms notification at sign-on, the following screen appears.

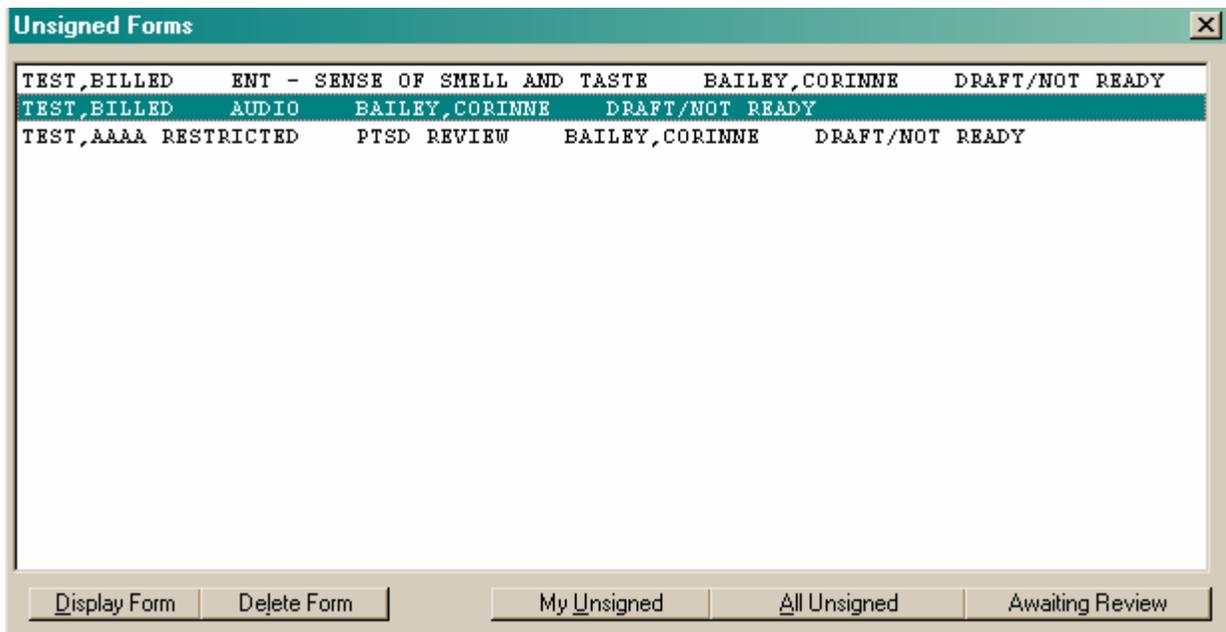


This window lists forms that have been started by examiners and not completed. Information provided includes patient name, worksheet name, author, and worksheet status.

Clicking on the *My Unsigned* button will list **your** unsigned forms.

Clicking on the *All Unsigned* button will list **all** unsigned forms.

Clicking on the *Awaiting Review* button will list the forms that were sent for review. Only users who hold the DVBAB CPWM AUTHORIZED REVIEWER security key have access to documents waiting for review. This button will only be active if your site requires a review of C&P examinations by designated reviewers.



Select the form you wish to complete. The *Display Form* and *Delete Form* buttons become enabled. (You must hold the required security key to delete forms.) Click the *Display Form* button. Follow the instructions in the New Worksheets section starting with Step 2.

Site Considerations: Review Functionality

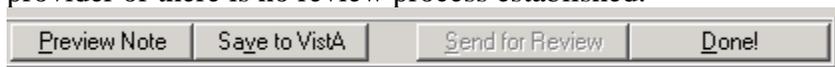
CPWM can be configured several ways, depending on the preference of the site. Completed examinations can either be:

1. Signed and released to the RO and TIU upon their completion with no prior review by another party.
2. Sent to a reviewer for approval before completion.
3. Sent to a reviewer **or** released immediately, depending upon the decision of the user.

Security keys control the way CAPRI functions for a specific user. These are summarized in the User Setup section of this document as well as described here. Depending on which keys a user is given, they may be forced to send their work to a reviewer, not allowed to send to a reviewer at all, or allowed to optionally send to a reviewer.

The following screens demonstrate what a user will see at the bottom of their screen when working with a CPWM document if the appropriate security key is assigned.

1. **DBBAB CPWM DISALLOW REVIEW** - User does not need to send documents for review and will be prevented from doing so. This may be useful if there is only one C&P provider or there is no review process established.



Note that the *Send for Review* button has been grayed out and cannot be selected.

2. **DVBAB CPWM OPTIONAL REVIEW** - User can choose whether to send a document for review or not.



Note that both the *Send for Review* and *Done* buttons are active.

3. **DVBAB CPWM REQUIRE REVIEW** - All of the user's documents require a review prior to going into AMIE and TIU.



Note that the *Done* button is grayed out.

REVIEWER

The individual who is acting as reviewer should be assigned the DVBAB CPWM REVIEWER key. When logging into CAPRI, the following dialog will be presented if any documents have been sent for review.

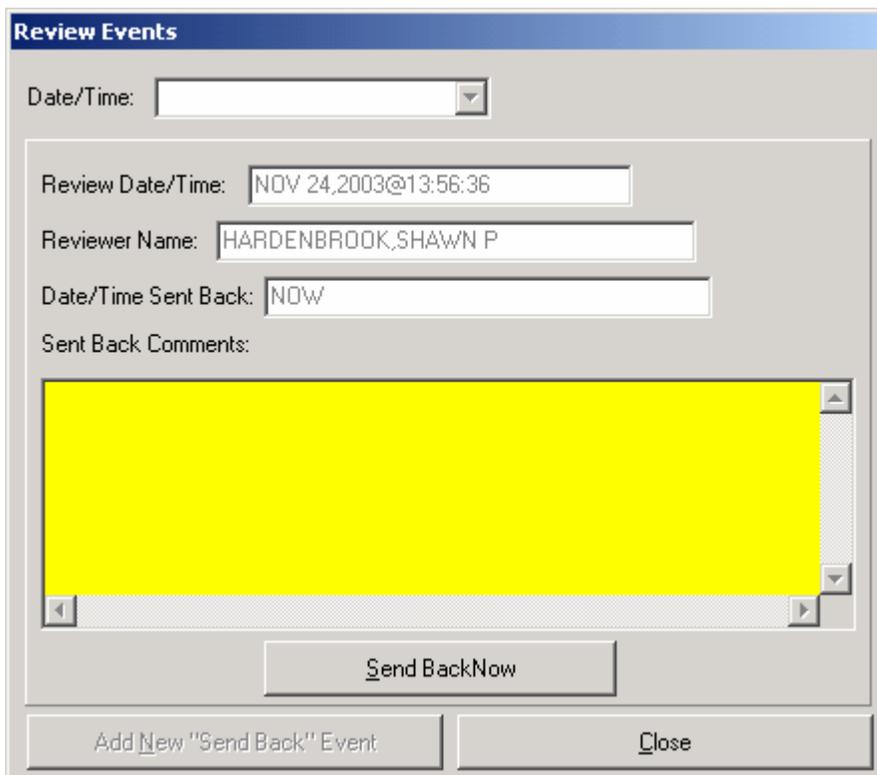


The buttons inside a CPWM document will also appear slightly different.



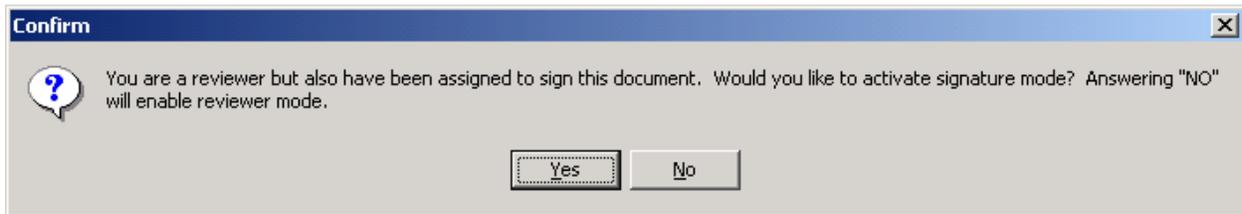
Clicking the *Send for Signature* button will allow the reviewer to select a signer for the document. The document will then be sent to that person and they will be authorized to complete the upload process.

If there is a problem with the document, the reviewer can communicate with the original author by clicking the *Review Events* button. If this button is clicked, the following dialog will be displayed.



The reviewer can browse previous activity on the document by selecting entries under the “Date/Time” field, if there are any. To create a new review event, the reviewer will click the *Add New Send Back Event* button. The top 3 fields will be set automatically. The reviewer will place any communication to the author in the “Sent Back Comments” field. Once completed, by clicking the *Send Back Now* button, the status of the document will be changed to “Sent Back” and the original author will receive a notice the next time they log into CAPRI. The reviewer’s comments will be the first thing seen when working with the sent back document.

If a reviewer has been selected to sign a document by another reviewer, s/he will see the following prompt when displaying that document with CPWM.



This prompt will allow the user to override the signature, enter the document as a reviewer, and potentially re-assign the document to another signer.

ADDITIONAL CONSIDERATIONS

A reviewer can display any document in CPWM, even if it’s unsigned. Users who do not have the DVBAB CPWM REVIEWER key can only view signed documents or unsigned documents that belong to them.

