MOBILE ELECTRONIC DOCUMENTATION (MED)

RELEASE NOTES & INSTALLATION GUIDE

Documentation Patch: TIU*1.0*262
Server Patch: TIU*1.0*257
Client Software: Version 2.3

Original Release January 2011

Revised January 2013

Department of Veterans Affairs (VA)
Office of Information & Technology (OIT)
Product Development (PD)

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Revision History

Date	Revision	Description	Author
01/11/2013	2.8	With patch TIU*1*264: • Corrected the security key reference to TIU MED MGT security key in Step #5 in the "Configure MED VistA Software" section.	<mark>REDACTED</mark>
09/21/2011	2.7	Tech review and edit updates based on review/feedback from <mark>REDACTED</mark> review: • Updated all MED document file references to the following: ○ TIU_1_262_MED_IG.doc/pdf ○ TIU_1_262_MED_TM.doc/pdf ○ TIU_1_262_MED_UM.doc/pdf • Updated all footers to reference MED documentation Patch TIU*1.0*262. • Updated the "General Updates" section to reference Patch TIU*1.0*262 and MED documentation updates.	<mark>REDACTED</mark>
09/14/2011	2.6	Tech review and edit updates based on review/feedback from <mark>REDACTED</mark> review: • Updated and renamed Section 3.2, "Prerequisite Software and Documentation." • Updated Section 3.3, "Software and Documentation Retrieval." Since MED is now to be a nationally released package, removed references to phased implementation and release. • Added and updated software-related sub-sections 3.3.1.1 and 3.3.1.2. • Added and updated documentation-related sub-sections 3.3.2.1, 3.3.2.2, and 3.3.2.3. • Updated the first paragraph in Step 3 in Section 5.2. Changed "deploring" to "deploying." • Updated note in Step 3d in Section 5.2. Changed "need" to "needed." • Added the following sentence to blank pages added so all chapter/document ends on an even page for double-sided printing: "This page intentionally left blank for double-sided printing."	<mark>REDACTED</mark>

Date	Revision	Description	Author

09/05/2011	2.5	Tech review and edit updates based on review/feedback from MED Core team:
		
		• Updated the following sections to indicate users *must* be given **Full Control** access permission to the MED directory (i.e., Read, Write, Modify, and Execute), as ==REDACTED==
		
		   o Section 5.1, "Install MED GUI Software."
		
		   o Section 5.2, "Configure MED GUI Software."
			==REDACTED==

08/11/2011	2.4	Tech review and edit updates based on review/feedback from MED Core team: • Removed patch compliance dates from the "How to Use this Manual" and "Distribution Files" sections, as per Chuck Schofer.	==REDACTED==
08/10/2011	2.3	Tech review and edit updates based on review/feedback from MED Core team: • Updated the cautionary note regarding national release in the "Software and Documentation Retrieval" section, as per ==REDACTED==r review. • Updated reference from "VA Service Desk" to "National Service Desk-Tuscaloosa" in the "General Support" section, as per Chuck Schofer review. • Added Note to the Description field for the TIU MED MANUAL PATIENT security key in Table 5, as per ==REDACTED== review. • Updated responsible parties for obtaining and exporting templates in the "Install MED GUI Software" section, as per ==REDACTED== review. • Removed author references, other than Project Manager and Tech Writer, from "Revision History" section, as per Product Support review. • Added phrase "to the network share directory" to Step 3b in the "Install MED GUI Software" section, as per Product Support review. • Removed lock from the TIU MED DEL PARM option in Table 4, as per Product Support review. • Updated Step 5 in the "Configure MED VistA Software" section, as per Product Support review.	==REDACTED==

Date	Revision	Description	Author
		• Updated the procedures in the "Install MED GUI Software" section, as per Product Support review. • Updated Note contact info in Step 3d in the "Configure MED GUI Software" section, as per Product Support review. • Removed "Product Support (PS)" from the "Intended Audience" section, as per Product Support review. • Updated the Note in Step 2 in the "Configure MED GUI Software" section, as per Product Support review.	
07/27/2011	2.2	Tech review and edit updates based on review/feedback from Product Support team: • Added all Mobile Electronic Device (MED) VistA patch references and Graphical User Interface (GUI) client software version to the Title page. • Added the "Orientation" section in accordance with national documentation standards. Moved topics from the "Introduction" section into this new section. • Clarified the GUI version number in the "General Updates" section. • Changed the compliance date for Patch TIU*1.0*257 from 08/07/11 to 10/02/11 in the "Distribution Files" section. • Corrected the security key reference to TIU MED MGT security key in Step #5 in the "Configure MED VistA Software" section. • Added "The CAC is responsible for creating/determining which HBPC Health Summary will be used." to introductory paragraph in Step #5 in the "Configure MED VistA Software" section. • Removed Step #6 from the "Configure MED VistA Software" section and added it to the MED User Manual. • Updated the roles responsible and content for the procedures in the "Install MED GUI Software" section. For example, changed "Write access" to "Read, Write, Modify, and Execute access". • Added a note suggesting users accept the default install directory in Step #5 in	<mark>REDACTED</mark>

Date	Revision	Description	Author

		the "Install MED GUI Software" section.
		• Updated the "Configure MED GUI Software" section:
		  o Deleted information on setting the MED.exe program file properties in Step #1 to just reference the desktop shortcut properties.
		  o Added procedures to set permission for the Mobile Electronic Documentation folder in Step #2.
		  o Added Step #3 procedures to configure the MED default "Template Update Path".
		• Added the REDACTED phone number to the "General Support" section.
		• Made general style, formatting, grammar, punctuation, and spelling updates as needed.	

07/12/2011	2.1	Tech review and updates based on conference call/Patient Safety team (Jeanie Scott) review/feedback:
		• Separated VistA M Server and GUI instructions into separate chapters.
		
		Verified installation steps in each section only apply to the environment being described (i.e., VistA M Server OR client workstation).
		• Updated the "Prerequisite Software" section.
		• Updated the "Install MED GUI Software" section.
		• Updated the "Configure MED GUI Software" section.
		• Deleted duplicate content already listed in the MED Technical Manual (e.g., options, security keys, and RPCs) and User Guide (e.g., Import Template samples and security keys).
		• Added/Updated the following sections due to National Documentation Standard requirements:
		  o Added "Uninstall MED GUI Software" section.
		  o Updated the "Troubleshooting and Training" section; however, the content was reduced to refer user to open Remedy tickets for any issues.
			REDACTED

Date	Revision	Description	Author
06/23/2011	2.0	Tech review and updates: • Renamed document. Retained patch reference ID as part of name, since installation guide are patch-specific. • Reformatted document to follow current national documentation standards and style guides. • Added alternate text to all images for Section 508 compliance. • Added "Release Notes" section to list the changes made with Patch TIU*1.0*257 to the software since the release of Patch TIU*1.0*244. • Updated the "Introduction" section to be consistent across the MED documentation set. • Added/Updated other sections similar to the Patch TIU*1.0*244 Installation Guide. • Remedy Tickets #483291 and 485507: Added Step 6 in the "Installing and Configuring MED—GUI Client Workstation" section. Advises user to add IP/DNS and port information to MED launch desktop shortcut. • Made grammar, punctuation, and spelling updates as needed.	REDACTED
01/21/2011	1.0	Patch TIU*1.*257 Initial document.	MED Development Team

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Contents

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Figures and Tables

Figures

Tables

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Orientation

How to Use this Manual

The Mobile Electronic Documentation (MED) application consists of both a Veterans Health Information Systems and Technology Architecture (VistA) M Server component and a Microsoft® Windows laptop/client workstation Graphical User Interface (GUI) component:

- Original VistA M Server Patch: TIU*1.0*244 (released date: 06/03/2010).
- Updated VistA M Server Patch: TIU*1.0*257 (released date: 01/21/2011).
- Documentation-only VistA M Server Patch TIU*1.0*262.
- Current Laptop/Client Workstation software: MED.exe Version 2.3.

This manual provides the installation instructions for installing the Text Integration Utility (TIU) Patch TIU*1.0*257 on the VistA M Server and the MED GUI software Version 2.3 on the laptop/client workstation.

MED works in tandem with CPRS; however, this manual does *not* attempt to fully document how to create templates or describe other functions of CPRS.

> **REF:** For installation instructions; lists of routines, files, and options; additional technical information; and user information on CPRS, see the CPRS documentation on the VA Document Library (VDL) at the following link:
>
> http://www.va.gov/vdl/application.asp?appid=61

Intended Audience

The intended audience of this manual is all key stakeholders. The stakeholders include the following:

- Information Resource Management (IRM)
- Clinical Application Coordinators (CAC)
- Product Support (PS)

Legal Requirements

There are no special legal requirements involved in the use of MED software.

Disclaimers

This manual provides an overall explanation of how to configure the MED software; however, no attempt is made to explain how the overall VistA programming system is integrated and maintained. Such methods and procedures are documented elsewhere. We suggest you look at the various VA Web sites on the Internet and VA Intranet for a general orientation to VistA. For example, visit the Office of Information & Technology (OIT) VistA Development VA Intranet Web Site:

http://vaww.vista.med.va.gov/

DISCLAIMER: The appearance of any external hyperlink references in this manual does not constitute endorsement by the Department of Veterans Affairs (VA) of this Website or the information, products, or services contained therein. The VA does not exercise any editorial control over the information you may find at these locations. Such links are provided and are consistent with the stated purpose of this VA Intranet Service.

Documentation Conventions

This manual uses several methods to highlight different aspects of the material:

- Various symbols are used throughout the documentation to alert the reader to special information. The following table gives a description of each of these symbols:

Table ii. Documentation symbol/term descriptions

Symbol	Description
	NOTE/REF: Used to inform the reader of general information including references to additional reading material.
	CAUTION or DISCLAIMER: Used to caution the reader to take special notice of critical information.

- Descriptive text is presented in a proportional font (as represented by this font).

- Conventions for displaying TEST data in this document are as follows:

  o The first three digits (prefix) of any Social Security Numbers (SSN) will begin with either "000" or "666".

  o Patient and user names will be formatted as follows: [Application Name]PATIENT,[N] and [Application Name]USER,[N] respectively, where "Application Name" is defined in the Approved Application Abbreviations document and "N" represents the first name as a number spelled out and incremented with each new entry. For example, an MED test patient and user names would be documented as follows: MEDPATIENT,ONE; MEDPATIENT,TWO; MEDPATIENT,THREE; MEDUSER,ONE, MEDUSER,TWO, MEDUSER,THREE, etc.

- Sample HL7 messages, "snapshots" of computer online displays (i.e., character-based screen captures/dialogues) and computer source code are shown in a *non*-proportional font and enclosed within a box. Also included are Graphical User Interface (GUI) Microsoft® Windows images (i.e., dialogues or forms).

  o User's responses to online prompts will be boldface.

  o The "**<Enter>**" found within these snapshots indicate that the user should press the **Enter** key on their keyboard. Other special keys are represented within angle brackets (**< >**). For example, pressing the **PF1** key can be represented as pressing **<PF1>**.

  o Author's comments, if any, are displayed in italics or as "callout" boxes.

    NOTE: Callout boxes refer to labels or descriptions usually enclosed within a box, which point to specific areas of a displayed image.

- All uppercase is reserved for the representation of M code, variable names, or the formal name of options, field and file names, and security keys (e.g., the TIU MED MGT key).

Documentation Navigation

This document uses Microsoft® Word's built-in navigation for internal hyperlinks. To add **Back** and **Forward** navigation buttons to your toolbar, do the following:

1. Right-click anywhere on the customizable Toolbar in Word 2007 (not the Ribbon section).

2. Select **Customize Quick Access Toolbar** from the secondary menu.

3. Press the dropdown arrow in the "Choose commands from:" box.

4. Select **All Commands** from the displayed list.

5. Scroll through the command list in the left column until you see the **Back** command (green circle with arrow pointing left).

6. Click/Highlight the **Back** command and press the **Add** button to add it to your customized toolbar.

7. Scroll through the command list in the left column until you see the Forward command (green circle with arrow pointing right).

8. Click/Highlight the Forward command and press the **Add** button to add it to your customized toolbar.

9. Press **OK**.

You can now use these **Back** and **Forward** command buttons in your Toolbar to navigate back and forth in your Word document when clicking on hyperlinks within the document.

How to Obtain Technical Information Online

Exported file, routine, and global documentation can be generated through the use of Kernel, MailMan, and VA FileMan utilities.

NOTE: Methods of obtaining specific technical information online will be indicated where applicable under the appropriate topic.

REF: See the *Mobile Electronic Documentation (MED) Technical Manual* for further information.

Online Help

VistA M-based software provides online help and commonly used system default prompts. Users are encouraged to enter question marks at any response prompt. At the end of the help display, you are immediately returned to the point from which you started. This is an easy way to learn about any aspect of VistA M-based software.

The MED laptop/client workstation software includes an MED GUI online help file (i.e., MED.chm). Instructions, procedures, and other information are available from the. To access the online help do either of the following:

- Inside MED, click on the **Help | Contents** menu options from the MED GUI toolbar or press the **F1** key while you have any MED dialogue screen open.

- Outside MED, double-click on the **MED.chm** file.

Obtaining Data Dictionary Listings

Technical information about VistA M-based files and the fields in files is stored in data dictionaries (DD). You can use the List File Attributes option on the Data Dictionary Utilities submenu in VA FileMan to print formatted data dictionaries.

REF: For details about obtaining data dictionaries and about the formats available, see the "List File Attributes" chapter in the "File Management" section of the *VA FileMan Advanced User Manual*.

Assumptions about the Reader

This manual is written with the assumption that the reader is familiar with the following:

- VistA computing environment

- Microsoft® Windows

- M programming language

Reference Materials

Readers who wish to learn more about MED should consult the following:

- *Mobile Electronic Documentation (MED) User Manual*—Contains instructions on how to use the MED software.

- *Mobile Electronic Documentation (MED) Technical Manual*—Contains instructions for implementing and maintaining the MED software on the VistA M Server and Laptop/Client Workstation.

- *FORUM Patches: TIU*1.0*244, TIU*1.0*257, and TIU*1.0*262.*

VistA documentation is made available online in Microsoft® Word format and Adobe® Acrobat Portable Document Format (PDF). The PDF documents *must* be read using the Adobe® Acrobat Reader (i.e., ACROREAD.EXE), which is freely distributed by Adobe® Systems Incorporated at the following Website:

http://www.adobe.com/

VistA documentation can be downloaded from the VHA Software Document Library (VDL) Website:

http://www4.va.gov/vdl/

VistA documentation and software can also be downloaded from the Product Support (PS) anonymous directories:

- Preferred Method   REDACTED

  i   **NOTE:** This method transmits the files from the first available FTP server.

REDACTED

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1   Release Notes

This chapter describes updates to the Mobile Electronic Documentation (MED) software with the installation of the Text Integration Utility (TIU) Patch TIU*1.0*257 and 262.

1.1 General Updates

- Patch TIU*1.0*257 addresses two issues with the MED application initially released with Patch TIU*1.0*244:

    o Intermittent failure when retrieving patient data into the MED database when two or more users simultaneously attempted to retrieve Health Summary information. The data was either not imported or imported and associated within the MED database to the incorrect patient.

    o Patient having an incomplete or corrupted Date of Birth (DOB). MED would not allow patient information to be retrieved and would not allow that patient to be imported into the MED database. This issue is fixed in the latest Graphical User Interface (GUI) client workstation software Version 2.3.257.21.

- Patch TIU*1.0*262 updated all of the following MED documentation:

    o Mobile Electronic Documentation (MED) Installation Guide (TIU_1_262_MED_IG.doc/pdf)

    o Mobile Electronic Documentation (MED) Technical Manual (TIU_1_262_MED_TM.doc/pdf)

    o Mobile Electronic Documentation (MED) User Manual (TIU_1_262_MED_UM.doc/pdf)

1.2 Option Updates

Patch TIU*1.0*257 removes and replaces the Mobile Electronic Documentation option [TIU MED GUI RPC] distributed with Patch TIU*1.0*244 with the following option:

Mobile Electronic Documentation option [TIU MED GUI RPC V2]—Creates the desired context for the GUI application on the VistA M Server.

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2 Introduction

Mobile Electronic Documentation (MED) 2.3 is a Veterans Health Information Systems and Technology Architecture (VistA) software application. It enables Department of Veterans Affairs (VA) staff to access a patient's previously downloaded electronic medical record information when not connected to the VA network. MED is designed to work in tandem with the Computerized Patient Record System (CPRS) as temporary storage of patient notes. This includes the ability to enter notes using CPRS exported Templates (**.txml**). MED promotes user satisfaction and efficiency in the login and documentation process by allowing access to CPRS at the point of care (POC) and avoid the duplicate process of charting handwritten notes at the end of the day.

When providing health care services, Home and Community Care staff (e.g., physicians, nurses, dieticians, social workers, and health care providers) must travel to a variety of geographic locations in which Internet access and coverage is often unreliable or sometimes unavailable. MED does the following:

- Allows access to secure patient information without the need for wireless Internet connectivity.

- Promotes the security of patient information by removing the need to print and carry excessive amounts of patient-sensitive data out of the clinical setting and into the community.

- Allows users to view and download to their secured laptops/client workstations Health Summary and MED Created Notes for patients in Home Based Primary Care (HBPC) Clinics.

- Provides the ability to enter and review patient documentation (e.g., Progress Notes) remotely at the point of care (POC), such as patient's home, when they are not connected to the VA network.

- Enables the transfer of patient data documented in MED during a home visit to be imported into CPRS as a patient note, which becomes part of the patient record.

- Minimizes errors from home visits by removing the need for paper records or the need to manually transfer (e.g., copy and paste) patient data from a mobile device.

CAUTION: This version of MED does *not* encrypt data. All laptops/client workstations are required to have full disk encryption and VA security policies. They should have normal health checks including security updates and antivirus.

Please be aware that if a laptop/client workstation is assigned to multiple users, MED notes and health summaries include patient information that is viewable to *all* users of that computer. Therefore, *all* users of the same laptop/client workstation *must* have the same level of security access to view this information.

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3   Pre-Installation Instructions

3.1 Distribution Files

The Mobile Electronic Documentation (MED) application consists of both a VistA M Server component and a Windows® Client Workstation component.

- VistA M Server Text Integration Utility (TIU) Patches: TIU*1.0*257 (released date: 01/21/2011)

- Client Workstation (e.g., laptops): MED 2.3 Graphical User Interface (GUI) software

All the required MED files for Patch TIU*1.0*257 are contained in the following Zip distribution file:

TIU_1_257_MED.ZIP

3.2 Prerequisite Software and Documentation

Patch TIU*1.0*257 requires the installation of Patch TIU*1.0*244 on the VistA M server. The complete MED documentation set and required prerequisite software is included in the Patch TIU*1.0*244 distribution zip file (i.e., TIU_1_244_MED.ZIP).

REF: For instructions on how to obtain the TIU_1_244_MED.ZIP distribution and install Patch TIU*1.0*244, see the *Mobile Electronic Documentation (MED) Installation Guide* for Patch TIU*1.0*244 located on the VA Software Document Library (VDL) at:

http://www.va.gov/vdl/application.asp?appid=190

3.3 Software and Documentation Retrieval

3.3.1 Software

3.3.1.1   Contents

The TIU_1_257_MED.ZIP distribution file contains the MED VistA M Server and GUI software (Table 1).

Table 1. Contents of TIU_1_257_MED.ZIP distribution file

File	Description	FTP Format
MED Setup.exe	MED GUI Client Install File	Binary
TIU_1_257_MED.KID	MED VistA M Server KIDS build	ASCII

3.3.1.2   Download Location—Anonymous Directories

The TIU_1_257_MED.ZIP distribution file is available on the Product Support (PS) ANONYMOUS.SOFTWARE FTP directories listed below:

Table 2. FTP download servers—Anonymous directories

Location	FTP Address	Directory
VistA Download Site (This is the preferred site. It transmits the files from the first available FTP server.)	**download.vista.med.va.gov**	**ANONYMOUS.SOFTWARE**
REDACTED	REDACTED	REDACTED
REDACTED	REDACTED	REDACTED
REDACTED	REDACTED	REDACTED
REDACTED	REDACTED	REDACTED

3.3.2   Documentation

3.3.2.1   Contents

The MED and Patch TIU*1.0*257/262 documentation consists of the following files:

Table 3. MED documentation

File	Description	FTP Format
TIU_1_262_MED_IG.DOC	Install Guide (Word Version)	Binary
TIU_1_262_MED_IG.PDF	Install Guide (Adobe Acrobat Version)	Binary
TIU_1_262_MED_TM.DOC	Technical Manual (Word Version)	Binary
TIU_1_262_MED_TM.PDF	Technical Manual (Adobe Acrobat Version)	Binary
TIU_1_262_MED_UM.DOC	User Manual (Word Version)	Binary
TIU_1_262_MED_UM.PDF	User Manual (Adobe Acrobat Version)	Binary

3.3.2.2   Download Location—Anonymous Directories

The MED documentation files are available on the Product Support (PS) ANONYMOUS.SOFTWARE FTP directories listed in Table 2.

3.3.2.3 Download Location—VA Software Document Library (VDL) Web Site

The MED documentation is also available on the VA Software Document Library (VDL) Web Site:

http://www.va.gov/vdl/application.asp?appid=190

3.4 Verify MED Folder and Template Installed in CPRS

The Clinical Application Coordinator (CAC) *must* verify that the Mobile Electronic Documentation template folder and the **Import M.E.D. Notes** template were installed in the TIU TEMPLATE file (#8927) as part of Computerized Patient Record System (CPRS).

> **NOTE:** Patch TIU*1*244 *should have* already created this template folder and template!

To verify the existence of the folder and template, perform the following procedures:

1. Open the Computerized Patient Record System (CPRS) application.
2. Select the **Notes** tab.
3. Click the **Templates** button.
4. Expand the **Shared Templates** folder.
5. Verify that the **Mobile Electronic Documentation** folder and the **Import M.E.D. Notes** template exists, as shown below:

Figure 1. CPRS—Verifying the Mobile Electronic Documentation folder and the Import M.E.D. Notes template exists
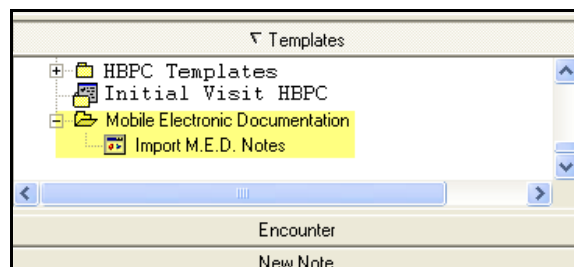
> **CAUTION: If the Mobile Electronic Documentation folder and the Import M.E.D. Notes template are *not* installed in CPRS, <u>STOP</u>! Have your CAC enter a National Remedy ticket to Text Integrated Utilities (TIU) for assistance *before* continuing with the installation!**

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4 Installing and Configuring MED—VistA M Server

Install and configure the Mobile Electronic Documentation (MED) software on the Veterans Health Information Systems and Technology Architecture (VistA) M Server.

4.1 Install Patch TIU*1.0*257

Text Integration Utility (TIU) Patch TIU*1.0*257 can be installed with users on the system. Installation should take less than 2 minutes; however, it is recommended that installation is performed at non-peak requirement hours.

To install the VistA KIDS Patch TIU*1.0*257, perform the follow procedures:

1. Verify the **Mobile Electronic Documentation** folder and the Import **M.E.D. Notes** template are installed in CPRS (see Section 3.4).

   CAUTION: If the Mobile Electronic Documentation folder and the Import M.E.D. Notes template are *not* installed in CPRS, <u>STOP</u>! Have your Clinical Application Coordinator (CAC) enter a National Remedy ticket to Text Integrated Utilities (TIU) for assistance *before* continuing with the installation!

2. From the KIDS—Kernel Installation & Distribution System menu [XPD MAIN], select the **Installation** menu [XPD INSTALLATION MENU].

3. At the "Select Installation Option:" prompt, select the **Load a Distribution** option [XPD LOAD DISTRIBUTION].

4. At the "Enter a Host File:" prompt, enter **TIU_1_257_MED.KID**. You may need to prepend a directory name (e.g., USER$:[TEMP]).

5. At the "Want to Continue with Load? YES//" prompt, enter **YES**. The patch has now been loaded into a Transport global on your system. Use KIDS to install the transport global.

6. From the KIDS—Kernel Installation and Distribution System menu [XPD MAIN], select the **Installation** menu [XPD INSTALLATION MENU].

7. (Recommended) From the Installation menu [XPD INSTALLATION MENU], select the **Verify Checksums in Transport Global** option [XPD PRINT CHECKSUM] to verify that all routines have the correct checksums; it ensures the integrity of the routines that are in the transport global:

   TIU Routine CHECK1^XTSUMBLD values:

   - Routine Name: TIUMED1:
     - Before: B39834276
     - After: B40119157

8. (Optional) From the Installation menu [XPD INSTALLATION MENU], use any of the following additional options as needed:

- **Print Transport Global** option [XPD PRINT INSTALL]—Use this option to print or view the contents of the transport global (i.e., KIDS build).

- **Compare Transport Global to Current System** option [XPD COMPARE TO SYSTEM]—Use this option to compare the routines in the Production account to the routines in the patch. It compares all components of the patch (e.g., routines, data dictionaries [DDs], templates, etc.).

- **Backup a Transport Global** option [XPD BACKUP]—Use this option to create a backup copy of the routines exported with the patch prior to installation. It does not backup any other changes (e.g., DDs or templates).

When prompted for an INSTALL NAME, enter **TIU*1.0*257**.

9. At the "Select Installation Option:" prompt, select the **Install Package(s)** option.

10. At the "Select INSTALL NAME:" prompt, enter **TIU*1.0*257**.

11. If prompted:

   a. "Want KIDS to INHIBIT LOGONs during the install? YES//", enter **NO**.

   b. "Want to DISABLE Scheduled Options, Menu Options, and Protocols? YES//", enter **NO**.

   c. "Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES//", enter **NO**.

   d. "Delay Install (Minutes): (0-60): 0//", enter **0** (Zero).

4.2 Configure MED VistA Software

After installing MED Patch TUI*1.0*257, Information Resources Management (IRM) staff and Clinical Applications Coordinators (CAC) should configure the MED software on the VistA M Server

To configure the MED VistA M Server software, perform the following procedures:

1. Assign the TIU MED MGT security key to IRM/CAC staff, if not already assigned.

2. Assign the following secondary options to the IRM/CAC staff so they can set, modify, and delete MED parameters:

Table 4. Secondary options for setting, modifying, and deleting MED parameters

Option Name	Option Text	Description
TIU MED MANAGEMENT	MANAGE MOBILE ELECTRONIC DOCUMENTATION	Use this option to select the desired Health Summary Report. ⓘ This option is locked with the TIU MED MGT security key.
TIU MED DEL PARM	HEALTH SUMMARY PARAMETER DELETE	Use this option to delete Health Summaries that have been previously set.

3. Assign the following security keys to those individuals who will be tasked with validating patient identification for manually entered MED patients (e.g., CAC and Home Based Primary Care [HBPC] super users):

Table 5. MED—Security keys for validating patient identification for manually entered MED patients

Security Key	Description
TIU MED MANUAL PATIENT	This security key allows users to enter manual patient notes in MED. If you hold this security key, the following *must* match exactly: • The first letter of the last name. • The first letter of the first name. ⓘ **NOTE:** If the user types Last Name,First Name with a space after the comma, the patient will *not* be recognized when attempting to import into CPRS. • The date of birth (DOB). • The nine-digit Social Security Number (SSN).
TIU MED MANUAL OVERRIDE	This security key allows users to enter manual patient notes in MED. If you hold this security key, the full SSN *must*

Security Key	Description
	match exactly.
	⚠ **CAUTION: Only a select few users should be given the TIU MED MANUAL OVERRIDE security key. Most users should _not_ be given this key.**
	It is suggested that there be a document review and patient review before importing notes into patient records that have typographical or missing data that stops a user from importing the information as outlined with the TIU MED MANUAL PATIENT security key.

4. Assign the Mobile Electronic Documentation secondary option [TIU MED GUI RPC V2] to HBPC users.

5. Set the Health Summary Type for MED parameter [TIU MED HSTYPE] to generate Health Summaries in MED. The CAC is responsible for creating/assigning the HBPC Health Summaries that will be used.

   To set the TIU MED HSTYPE parameter, the IRM/CAC staff needs to perform the following procedures:

   a. Select the **MANAGE MOBILE ELECTRONIC DOCUMENTATION** option [TIU MED MANAGEMENT].

   ℹ **NOTE:** This option is locked with the TIU MED MGT security key.

   b. At the "Enter Selection" prompt, select one of the following options:

   - 1—User [choose from NEW PERSON].

     At the "Please Select USER" prompt enter a user name in the NEW PERSON file (#200).

   - 2—Service [choose from SERVICE/SECTION].

     At the "Please select a SERVICE" prompt enter the service in the SERVICE/SECTION file (#49).

   - 3—Division [choose from INSTITUTION].

     At the "Please select a DIVISION:" prompt, enter the institution in the INSTITUTION file (#4).

   - 4—System [XXXXXXXX.MED.VA.GOV]

     Choose from the local system (e.g., ANYWHERE.MED.VA.GOV).

Figure 2. Manage Mobile Electronic Documentation option—Sample user dialogue to set the TIU MED HSTYPE parameter

```
Select Clinical Informatics Main Menu Option: MANAGE MOBILE ELECTRONIC
DOCUMENTATION


   TIU MED HSTYPE may be set for the following:

    1    User       [choose from NEW PERSON]
    2    Service    [choose from SERVICE/SECTION]
    3    Division   [choose from INSTITUTION]
    4    System     [ANYWHERE.MED.VA.GOV]

Enter Selection: 4 <Enter>  System

Enter a HS for SYSTEM [ANYWHERE.MED.VA.GOV]: HBPC MED//
```

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5 Installing and Configuring MED—GUI Client Workstation

After the Mobile Electronic Documentation (MED) software has been successfully installed and configured on the Veterans Health Information Systems and Technology Architecture (VistA) M Server (see Chapter 4), install and configure the MED Graphical User Interface (GUI) software component on individual laptops/client workstations.

5.1 Install MED GUI Software

To install the MED GUI laptop/client workstation software, perform the following procedures:

1. The Information Resource Management (IRM) network staff needs to create a network share download directory (e.g., \\VHA...\TIU MED) with **Full Control** access permission (i.e., Read, Write, Modify, and Execute).

2. The IRM network staff downloads and unzips the MED distribution file (TIU_1_257_MED.ZIP, see Section 3.1) into the network share download directory: The MED Setup.exe installer runs standalone and installs the MED software on a laptop/client workstation.

3. The Clinical Applications Coordinator (CAC) obtains the TIU templates (**.txml** files) that will be used in MED from the POC/CAC for MED. The CAC exports those TIU templates that will be used for MED to this network shared folder:

   a. The IRM network staff creates a sub-folder called "**Templates**" under the network share download directory in Step 1:

      \\VHA...\TIU MED**Templates**

   b. The CAC (with **Full Control** access permission to the network share directory) exports any TIU templates, with the exception of Reminder Dialogs, through the CPRS Template Editor into the **Templates** folder on the network share directory.

      > **(i)** **NOTE:** Reminder Dialogs *cannot* be used within the MED application. In addition, you can use patient data objects in any template, but the data will *not* populate until the template is imported into CPRS.

   c. Add a "**ScratchPad_**" prefix (be sure to include the underscore) to the name of any TIU templates that are to be used as a Scratch Pad templates in MED (e.g., ScratchPad_*NAMEOFTEMPLATE*.txml).

4. From the laptop that will be used for MED, run the MED Setup.exe file from the network share download directory or copy it onto the laptop/client workstation and then run it from that location.

5. Click **Next** through the following dialogues:

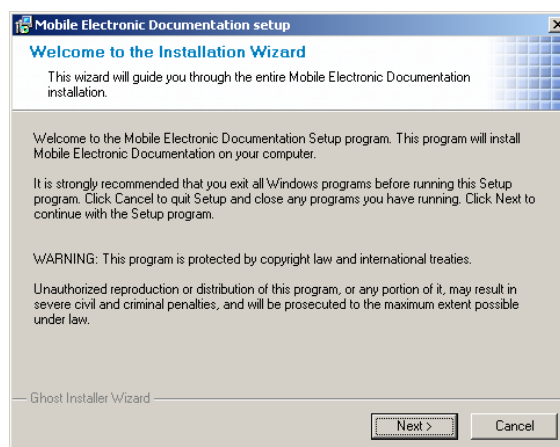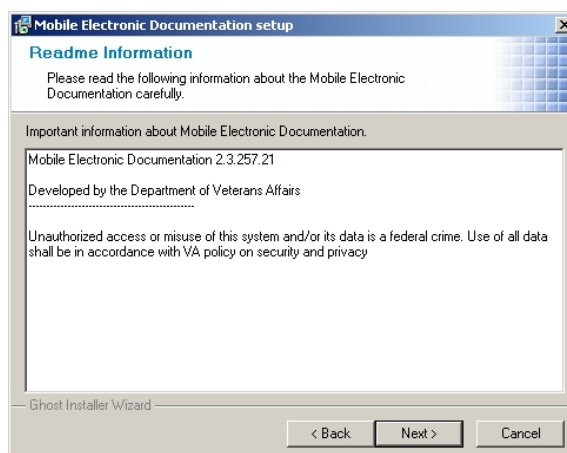**Figure 3. MED Install—Welcome wizard dialogue**

**Figure 4. MED Install—Readme Information dialogue**

By default, MED installs in the following directory:

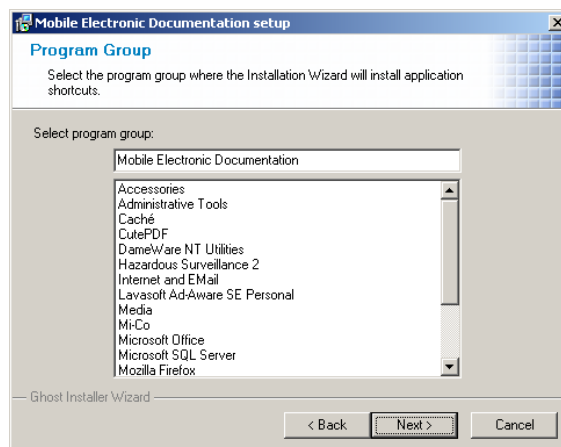C:\Program Files\Mobile Electronic Documentation

ⓘ **NOTE:** It is suggested you use the default settings from the Med Setup.exe install wizard; however, you can change the installation directory by clicking the **Browse** button and selecting a new install location.

Figure 5. MED Install—Destination folders dialogue
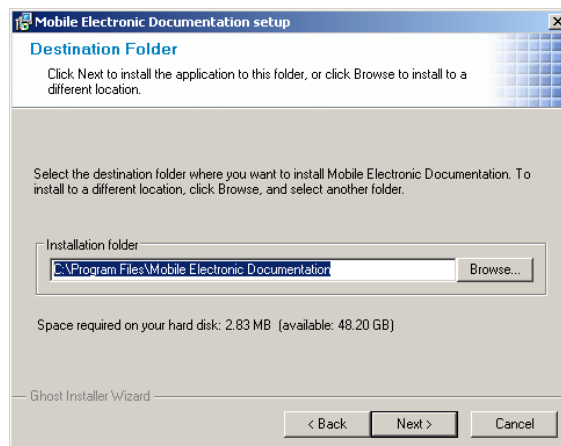
6. Click **Next** to select a Program Group. By default, "Mobile Electronic Documentation" is used.

Figure 6. MED Install—Program group selection dialogue

7. Click **Next** to begin installing the files.

8. Click **Finish**. The MED Setup.exe software automatically does the following:

- Creates the Mobile Electronic Documentation folder in the Microsoft® Windows Programs Files group, which includes the MED client application (MED.exe), help file (MED.chm) and other files as shown below:

Figure 7. Microsoft® Windows Explorer—Program Files MED directory folder and files
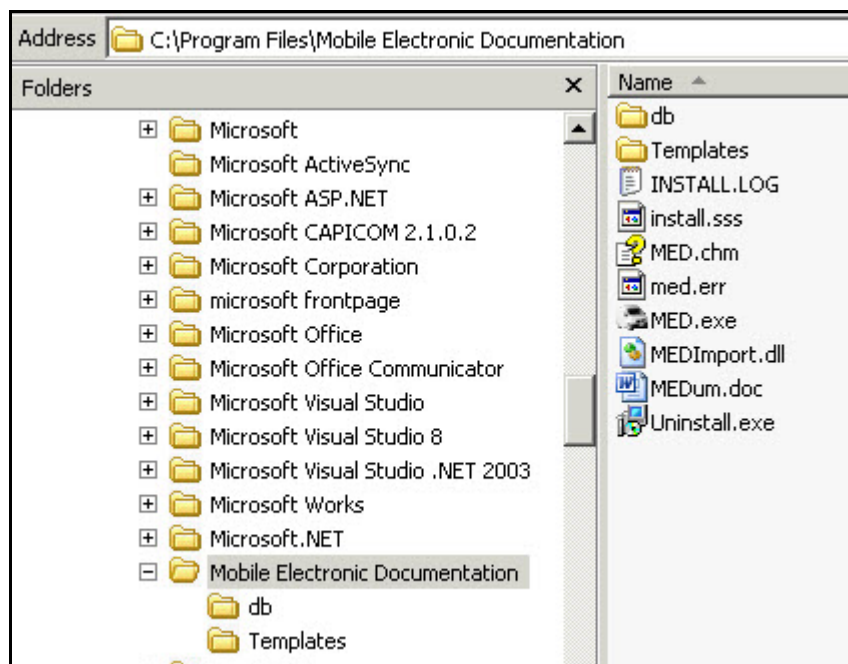
- Adds a "Launch MED" shortcut icon on the laptop/client workstation, as shown below:

Figure 8. MED—Desktop shortcut icon

- Copies all **.txml** template files from the network Templates folder to the following laptop/client workstation directory:

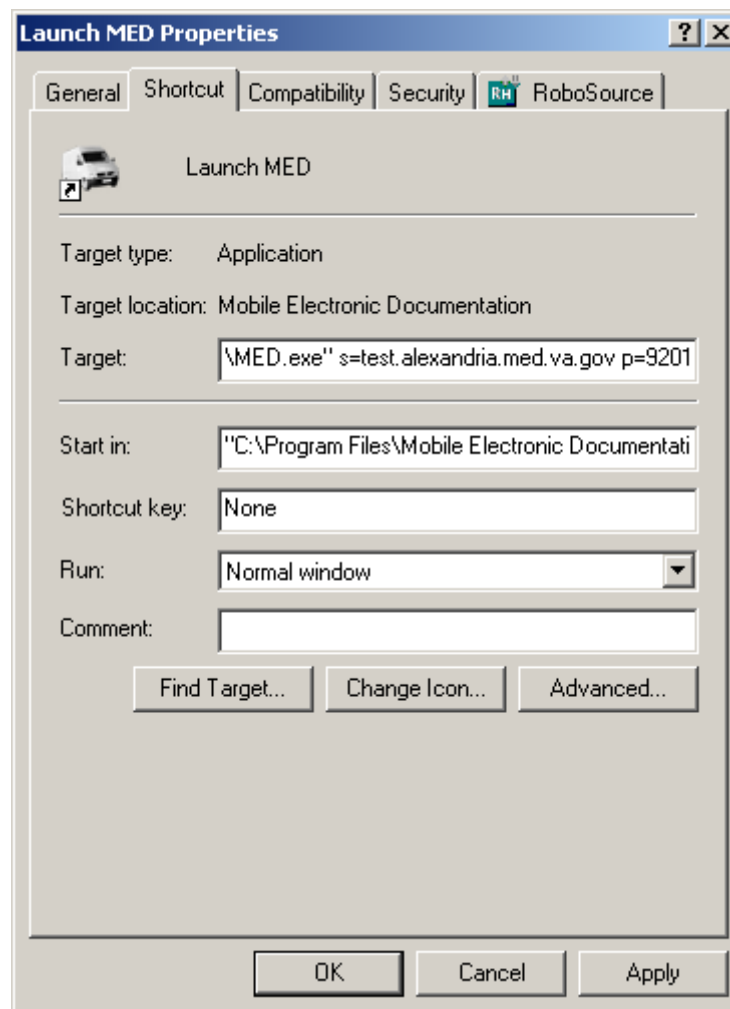 C:\Program Files\Mobile Electronic Documentation\Templates

REF: For further information about using MED, see the *Mobile Electronic Documentation Help* (i.e., MED.chm help file) in the Mobile Electronic Documentation folder on the laptop/client workstation and *Mobile Electronic Documentation (MED) User Manual* located on the VDL at:

http://www.va.gov/vdl/application.asp?appid=190

5.2 Configure MED GUI Software

1. Update the "Launch MED" desktop shortcut with your site IP and RPC Broker port as follows:

    a. Right-click on the MED launch icon on the desktop.

    b. Select **Properties**.

    c. Select **Shortcut** tab.

    d. In the target field, append the site IP address or Domain Name Service (DNS) and RPC Broker port information after the MED.exe location. For example:

`"C:\Program Files\Mobile Electronic Documentation\MED.exe"` ***s=test.alexandria.med.va.gov p=9201***

Figure 9. MED—Shortcut Target properties

2. Set Permission for the Mobile Electronic Documentation folder.

    On the HBPC laptop/client workstation, do the following:

    a. Navigate to the following directory:

        C:\Program Files\Mobile Electronic Documentation

    b. Right click on the Mobile Electronic Documentation folder.

    c. Select **Properties**.

    d. Select the group or user name in the upper portion of the Properties dialogue.

    e. Check the Write checkbox under the Allow column in the lower portion of the Properties dialogue.

    f. Press **OK**.

    > **NOTE:** In order for users to write the appropriate information while using the MED software, they *must* have **Full Control** access permission to this folder; otherwise, they will get access violation errors when launching MED.

3. Configure the MED default "Template Update Path".

    Before deploying the HBPC laptop/client workstation to the user, the IRM or CAC *must* retrieve and select a patient in MED on each laptop/client workstation and add the network **Templates** path so the templates will be available for use in MED.

    a. Launch MED.

    b. Click **Retrieve Patient(s)**.

    c. Click **Select a Patient**.

    d. Sign onto VistA: Enter your Access/Verify code.

    > REDACTED

    e. Select a patient to retrieve from the list.

    f. Click **Retrieve**.

    g. Once the patient is retrieved, click **Close**.

    h. The MED Patient Select window is displayed; select the patient name again and click **OK**.

    i. Select the **Tools** menu and then select the **Settings** option, as shown below:

Figure 10. MED—Settings menu option
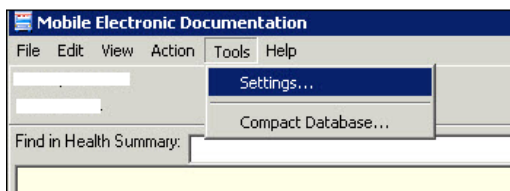
j. In the Users & Settings dialogue, if not already selected, click on the **Data & Files** tab.

k. Enter the following directory path (created in Step 3a in Section 5.1) in the "Template Update Path" field (Figure 11):

   \\VHA...\TIU MED**Templates**

l. Verify that the **Retrieve Health Summaries** checkbox is checked, as shown below:

Figure 11. MED Users & Settings dialogue—Data & Files
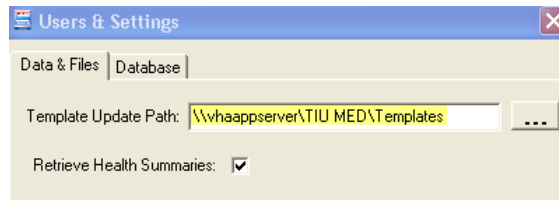
These templates will become available for the user of that laptop/client workstation after MED is closed and re-opened.

5.3 Uninstall MED GUI Software

If necessary, to uninstall/remove the MED software from the laptop/client workstation, perform the following procedures:

1. Press **Start**.

2. Select **Settings**.

3. Select **Control Panel**.

4. Select **Add or Remove Programs**.

5. Scroll through the list and select **Mobile Electronic Documentation**.

6. Press **Change/Remove**.

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6 Troubleshooting and Training

6.1 General Support

⚠️ **CAUTION: If the Mobile Electronic Documentation folder and the Import M.E.D. Notes template are _not_ installed in CPRS (see Section 3.4), <u>STOP</u>! Have your Clinical Application Coordinator (CAC) enter a National Remedy ticket to Text Integrated Utilities (TIU) for assistance _before_ continuing with the installation!**

ℹ️ **REF:** For further troubleshooting tips using MED, see the "Troubleshooting" section in the _Mobile Electronic Documentation (MED) Technical Manual_ located on the VDL at:

http://www.va.gov/vdl/application.asp?appid=190

6.2 Training

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