OFFICE OF
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User Guide

Patient Centered Management Module (PCMM)

Health Services DevSecOps Support

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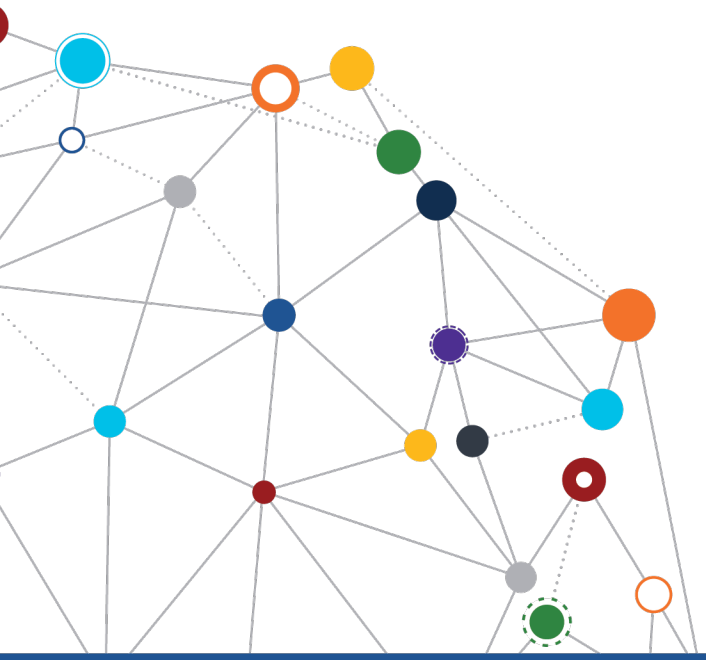
FOR INTERNAL USE ONLY



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PCMM Web Overview

The Pa ent Centered Management Module (PCMM) Web applica on assists VA facili es in implemen ng and monitoring pa ent and staff assignments in both primary care and non-primary care teams. PCMM Web is a web applica on running in a browser.

The newly developed Primary Care (PC) system balances produc vity with quality, access, and pa ent service. In a PC se ng and in the Pa ent-Aligned Care Team (PACT) model, pa ents are assigned a Primary Care Provider (PCP) who is responsible for delivering essen al health care, coordina ng all health care services, and serving as the point of access for VA care. A team is formed based on specific care type (i.e., Primary Care, Mental Health) and aligned around a pa ent, including providers across mul ple VA sites and in non-VA se ngs for efficient care coordina on and communica on. The PCP works together with a team of professionals which includes nurses, pharmacists, social workers, health care professions, trainees, clerks, and more. Addi onally, teams can be grouped together for a larger collabora ve team.

Within PCMM Web, users can establish and define a healthcare team, assign staff and health professions trainees to posi ons within the team, assign pa ents to the team, and assign pa ents to prac oners, including trainees. A pa ent can be assigned to mul ple PACT teams. Those assignments are tracked across VA sta ons through Mul ple PACT requests, which require an approval or a denial from all involved sta ons. Mul ple assignment requests for the same pa ent for different sta ons are allowed, but there can only be one ac ve assignment per pa ent, per sta on at a me.

When PCMM data is entered in a standardized manner, it can be used to analyze the system and PACT workload na onally by Veterans Integrated Service Network (VISN), and by a facility and its substa ons, as well as at the team level. PACTs manage the overall care provided to a majority of VA health care systems, and their workload capacity is an important factor in determining the total number of pa ents that can be cared for in the system.

For addi onal PCMM Web documenta on, refer to the VA So ware Document Library (VDL) Web site.

h p://www.va.gov/vdl/

- **Note:** The new helpdesk system ServiceNow (SN) will provide PCMM Web technical support. Contact SN at [REDACTED] or use the YourIT icon on your desktop to enter a new helpdesk cket.

System Requirements

The following are system requirements for u lizing the Pa ent Centered Management Module (PCMM) Web applica on:

- Access to the Veterans Health Administra on (VHA) Intranet via Microso Edge browser or Google Chrome Browser.
- Users are required to login using a PIV Card unless the user has a PIV exemp on to login with network creden als.
- Required "Divisions" are assigned in PCMM Web by the Principal Facility Coordinator, Principal MH Coordinator or VISN/Na onal PCMM Staff using PCMM Webs User Management func onality via the User Management bu on.
- Required "Divisions" for Vista sta ons are assigned to their Vista Profile by local/regional IT staff or ADPAC. These divisions should at a minimum match what is assigned to the user in PCMM Web. (Example: If user has division 123, 123AB, 123AC and 123AD assigned in PCMM Web, they should also have these sta ons assigned in VistA.)
- The "SCMC PCMMR WEB USER MENU" will need to be assigned as a secondary menu op on in Vista for Vista mapped sta ons.

1 Access PCMM Web

Requests for access to the PCMM applica on, updates to the VSSC Na onal Coordinators List, and PCMM Mailgroup are entered and managed through [REDACTED].

Once given access, users can access PCMM Web using a web browser via single sign-on capabili es. Single Sign-On Internal (SSOi) is an authen ca on service provided by Iden ty Access Management (IAM) and designated for opera ons-based applica ons such as PCMM Web. This service provides an extra layer of security when accessing the applica on, while reducing me associated with mul ple logon/logoff ac vi es. A PIV card is required, unless an excep on to use VA User Creden als is allowed.

- Upon successful login, if user is assigned mul ple facili es, the user is directed to the **Select/Change Facility Screen** or to the **PCMM Web Home Page**. If a user is assigned to multiple facilities, the user must select the appropriate facility before proceeding.
- Refer to **Select/Change Facility** section for additional information. If a user is only assigned to one facility, the **PCMM Web Home Page** displays for that facility. Once a user has selected the default facility, the **PCMM Web Home Page** displays it. The system then uses this Facility in all subsequent func ons.

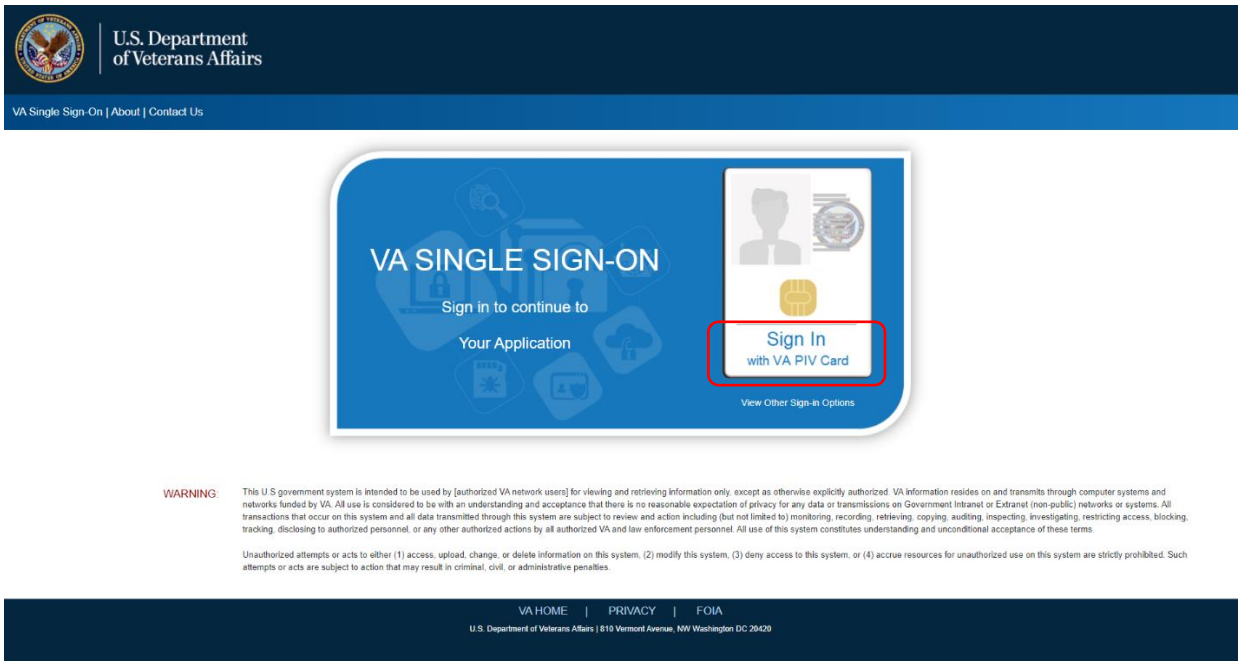
1.1 SSOi with PIV

1. Ensure your PIV card is inserted in the card reader.
2. Access PCMM Web through the web browser.

3. The VA Single Sign-On Screen displays. Click Sign In with VA PIV Card.

   - If the **VA Single Sign-On Screen** is not displaying using Internet Explorer, ensure SSL 2.0 and SSL 3.0 are unselected in the browser security se ngs. In your browser's top right corner, click the **Tools** icon and select **Internet Op ons**. Click the **Advance** tab and ensure the op ons are unselected.

Figure 1 - Single Sign-On with PIV Card



   - The system will verify and read the PIV card. If found, the **Windows Security** box displays with the list of cer ficates associated with the PIV card.

4. Select the **cer ficate** and click **OK** to display **the Ac vClient Login** window.

5. If more than one cer ficate displays, select **Click here to view cer ficate proper es** link to display the **Cer ficate Details** box. Select the Cer ficate Path tab and scroll to ensure the cer ficate ends **internal PIV Authen ca on**.

6. Enter your **Pin Number** and click **OK**.

7. Once the system verifies the PIV card and Pin Number match, the **Select/Change Facility Screen** displays or the **PCMM Web Home Page**.

   - If the user is *only* authorized to a single facility, the system defaults to the authorized facility. The user does not have to select it upon login. The System recognizes this access and uses the selected facility in all subsequent functions

   - If the user is authorized to access multiple facilities:

   - If the user has previously selected a default facility, the user does not have to select a facility upon login. The system defaults to the specified default facility and uses this facility in all

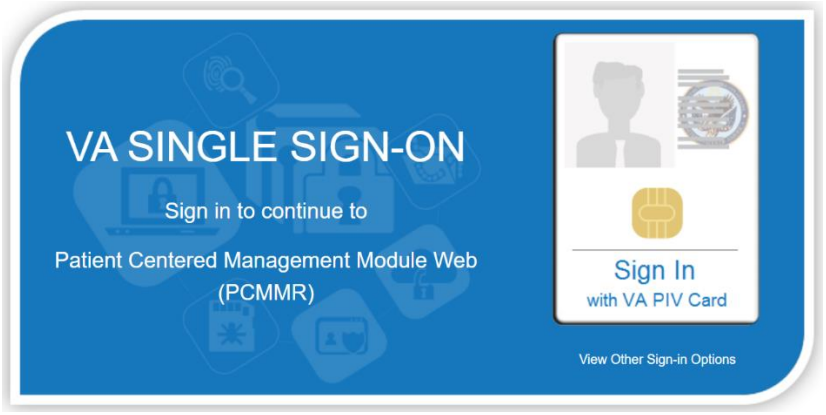
subsequent func ons. To change the facility, click the **Facility name link** in the header bar to display the **Select/Change Facility** page

1.1.1 Using VA Network ID and Password

In some cases, a user may sign-in with their **VA Network Username** and **Password**. This is only to be u lized when a PIV exemp on is required. User must call VA Help Desk and request this exemp on for this op on to be u lized

1. On the VA Single Sign-On Screen, click the View Other Sign-On Op ons link to display the VA Single Sign-On box.

Figure 2 - Signing in Using VA Network ID and Password

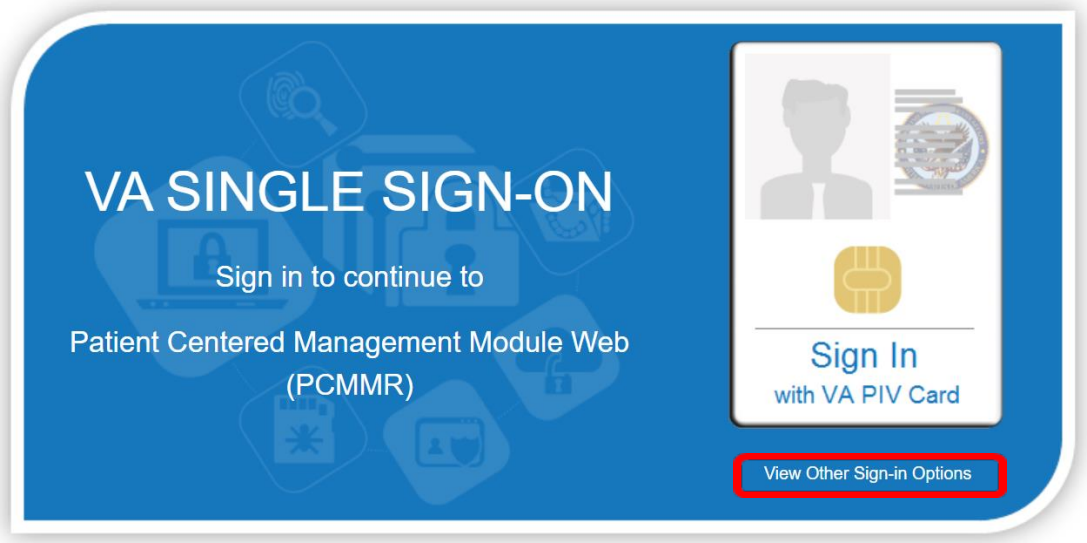


2. Click Sign in with VA Network ID.
3. **The VA Single Sign-On** box displays text fields to enter your **VA Network ID** and **Password**. Click **Sign-In**.
4. The system will verify the user and be redirected to the **Select/Change Facility Screen** or the **PCMM Web Home Page**.

1.1.2 Windows Authen ca on

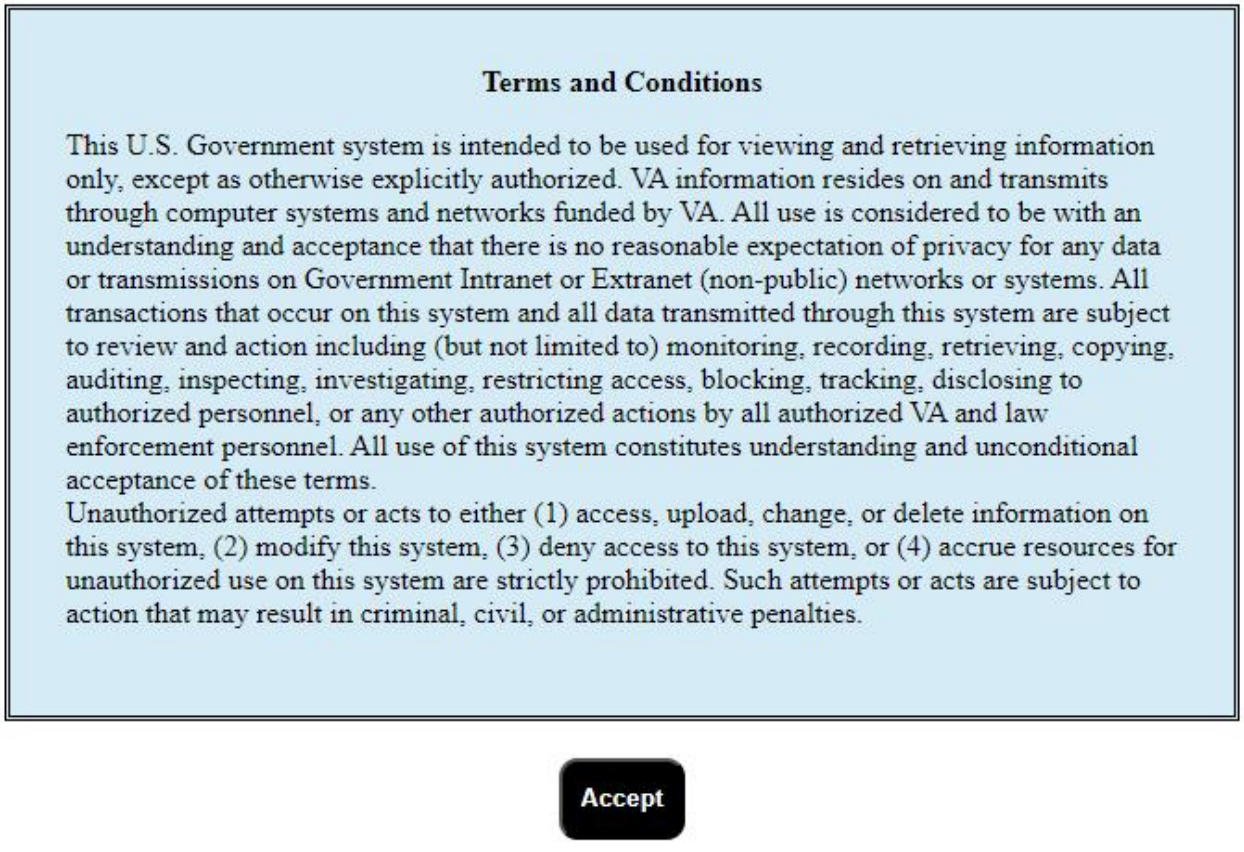
1. On the VA Single Sign-On Screen, click the View Other Sign-On Op ons link to display the VA Single Sign-On box.

Figure 3 - Signing In with Windows Authen ca on



2. Click Sign in with Windows Authen ca on.
3. The system will verify the user and the following a esta on will appear.

Figure 4 Terms and Condi ons A esta on



4. A er clicking **Accept**, you will be redirected to the **Select/Change Facility Screen** or the **PCMM Web Home Page**.

Notes:

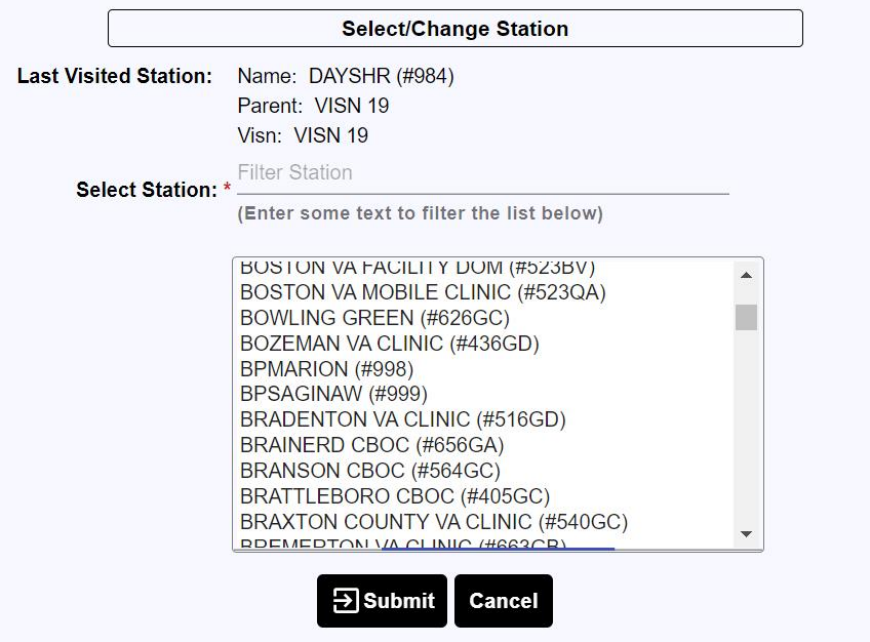
- For first me logins a er the PCMM Web upgrade from PCMM Legacy, a user may be prompted to set the me zone, if the system clock has changed me zones. This is usually a one- me occurrence.
- Ensure each PCMM Web user has VistA privileges for the Vista mapped sta on(s) they have access to in PCMM Web.
- If a user requires access to more than the 3-digit parent site, the user must also have access set up in VistA for that facility. For example, if a user requires access to site 123abc, the user's new person file must contain that site. If a user only has access for site 123 in VistA, they will only be able to search for pa ents associated with that site. If the user needs to have access to pa ents at site 123a and 123ag, the new person file in Vista should have the subdivisions added.

1.2 Select/Change Sta on

If a user is authorized to work at mul ple sta ons, the *Select/Change Sta on* screen displays a er login with a list of authorized sta ons. If a user is assigned to only one sta on, the Pa ent-Centered Management Module home page displays instead; skip the Select/Change Sta on sec on of this guide and refer to the PCMM Web sec on below for further details.

1. On the *Select/Change* Sta on screen, select the appropriate sta on in the Select a Sta on list to access PCMM Web and click Submit.
   - **Note:** For an easier selec on, the last sta on accessed is highlighted in the Select a Sta on list.
2. To filter through the list, enter the three-digit sta on code in the **Select Sta on** text box and click **Submit**. The *Pa ent-Centered Management Module* screen will display.

Figure 5 - Select/Change Sta on Screen



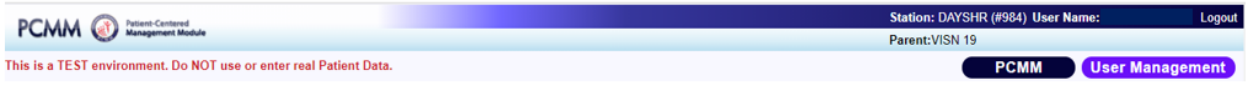
1.3 PCMM Web Home Page

A er entering VA creden als and the appropriate sta on is selected (if prompted), the Pa ent-Centered Management Module home page displays.

To navigate to the Pa ent-Centered Management Module home page at any me, click the **PCMM** bu on in the upper right corner. If a user has access to User Management func onality, the PCMM bu on and the User Management bu on are displayed.

The username, sta on name and number are displayed in the top right corner of the applica on header. The VISN is displayed below the sta on informa on.

Figure 6 - Sta on/User Menu Bar



If a user is only authorized to work at a single sta on, the system will default to that sta on and the sta on name along with its parent VISN is displayed. A user will only have access to the data for the sta on(s) that they are assigned to in PCMM Web.

1.3.1 The Menu Bar

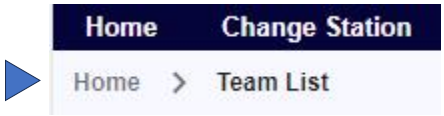
The menus across the top of the screen allow access to func ons that a user can perform, according to role assigned to the user.

Figure 7 - PCMM Web Menu Bar

1.3.2 The Bread Crumb Trail

As a user navigates through the applica on, the names of screens will appear at the top le of the screen to show your loca on in the applica on. A user can click the screen names to go to that loca on.

Figure 8 - Breadcrumbs



1.3.3 The Help Bu on

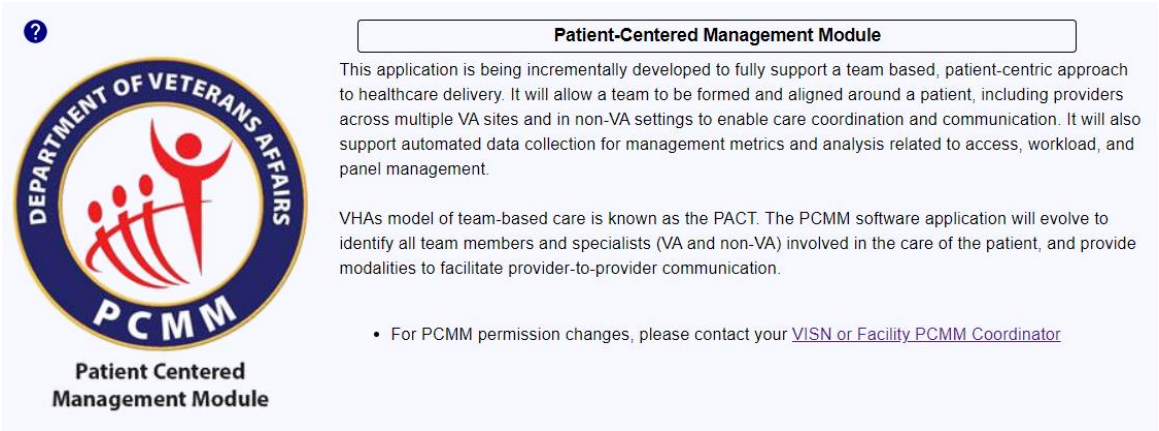
Clicking the blue **Help** bu on on each screen will display help that is specific to that screen. To access the Table of Contents for the en re help file, click **Help** > **Web Help** from the main menu. There is also a bread crumb trail at the top of the window that shows the loca on of the current help topic in the larger help file.

Figure 9 - Help Icon and Help Menu Item

1.3.4 The Content Area

This sec on of the window has explanatory text, and where all input, viewing, and PCMM Web tasks are performed.

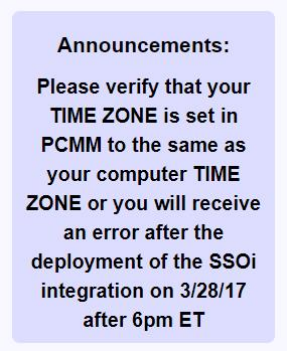
Figure 10 - Contents Area Screen



1.3.5 The Announcements Box

Any important program announcements will display in the Announcements box.

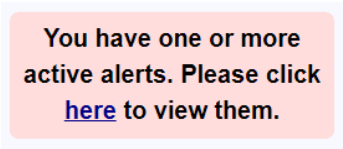
Figure 11 - Announcements Box



1.3.6 The Alerts Box

Any pending alerts will display in the Alerts box. Select the **click here** link to view the Alert Summary page.

Figure 12 - Alerts Box

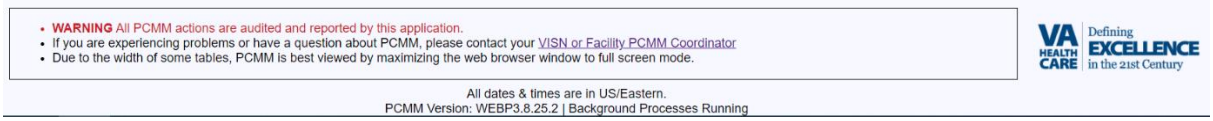


1.3.7 The Footer

This area at the bo om of every applica on screen contains:

- PCMM Audit Warning
- Contact informa on for ques ons or problems
- Time zone
- Applica on Version Number
- Background Processes Status

Figure 13 - Footer Screen



1.4 PCMM Web Icons

The following table describes the icons used in the PCMM Web.

Table 1 - PCMM Web Icons

Icon	Meaning	Page Loca on Example
	Open file	Completed Reports List
	Save As	Completed Reports List

Icon	Meaning	Page Loca on Example
	Run a Report	Reports List
	Permanently Delete	Open Alerts List
	View Team Roles	Team List
	Add	Team Profile The green icon is used to select an auto inac va on date for a team assignment.
	Edit/View Informa on	Pa ent Profile Posi on List Modify an Exis ng Posi on Alerts Summary
	Unassign/Remove	Pa ent Profile Modify an Exis ng Group Open Alerts List
	Add a Comment	Open Alerts List
	View selected Item	Model Panel Size Calcula on
	View informa on	The informa on bu on icon is used when informa on on a page cannot be edited but can only be viewed.
	Edit/Reassign	The edit icon is used when informa on on the page can be edited. Modify an Exis ng Posi on
	View Pa ent Inac va on	The Scheduled Inac va on Date is between 91 - 120 days
	View Pa ent Inac va on	The Scheduled Inac va on Date is between 61 - 90 days
	View Pa ent Inac va on	The Scheduled Inac va on Date is between 31 - 60 days

Icon	Meaning	Page Loca on Example
	View Pa ent Inac va on	The Scheduled Inac va on Date is between 1 - 30 days
	Email	Email staff member if an email address is associated with the record.
	Select an item	Search for a Group Search for Room Search for a Staff Team Reassignment
	Edit an Entry	Edit a Preceptee assigned
	Reassign Pa ent to Team	Pa ent Profile
	Convert Assignment to Canceled	Pa ent Profile
	Revert Assignment to Ac ve	Pa ent Profile
	Date Select	Anywhere a date is chosen.
	Search	Anywhere a list can be searched.
	Filter	Anywhere a table can be filtered

1.5 Log Out of PCMM Web

1. Click the **Log Out** link on the top right side of the screen.

Figure 14 - Log Out Link

2. A confirma on message is displayed. Click **OK** to confirm or **Cancel** to remain in the system.

- **Note**: The system will log a user out if no system ac vity for 15 minutes.

1.5.1 Automa c Timeout

The system automa cally logs a user out a er 15 minutes of inac vity. A warning message displays, coun ng down from 60 seconds un l a user is logged off the applica on.

A user may click the **OK** bu on to stop the count-down and con nue working. If the system automa cally logs off, the current work in PCMM Web is not saved.

1.6 Help With Error Messages

If the applica on displays an error at the me of log on or if error messages that is NOT part of data entry (e.g., a system error message), contact the VA ServiceNow Desk to log a helpdesk cket. The new helpdesk system ServiceNow (SN) will provide PCMM Web technical support. Contact SN at [REDACTED] or use the YourIT icon on your desktop to enter a new helpdesk cket.

With the appropriate access, a user may log a helpdesk cket and capture a screenshot of the error, to be placed with the cket.

2 User Management

If a user has a role which allows access to the User Management func onality and the **User Management** bu on displays when logging into PCMM Web, the authorized user can click the User Management bu on to setup a user in PCMM Web. (See Table 3 page 150)

2.1 Gran ng Access to PCMM Web

1. On the PCMM home screen, click the **User Management** bu on in the upper right corner to display the *User Management* screen.

Figure 15 – Select User Management

2. The *Search for Exis ng Users to Manager* screen may display or click **Users** from the Main Menu and then **Manage an Exis ng User** to display the *Search for Exis ng Users to Manager* screen.
3. The authorized user can search for new or exis ng users. The system will search first within PCMM Web to see if the user is already established. If not, the system will then search using LDAP for a new user. The following are search op ons:
   - Select the **Based on User ID** radio bu on to search for a user by the VHA Network ID. This is the default search parameter.
   - Select the **Using the full Last Name OR Using a part of the First Name and the full Last Name radio** bu on to search by the name criteria. The last name is required for this search. If the system gets an exact match, the user will be presented with the previously established data. If there is more than one user, the user will be presented with a user results list to select the appropriate user.
4. A er the user is selected, click **Submit** to display the *User Details* screen.
5. The User Details screen enables an authorized user to manage each user's access into PCMM Web. The authorized user will perform the following on this page:
   - Assign Role(s)
   - Search for Sta on(s)

- Assign Sta on(s)
- View Other Assigned Sta ons
- Inac vate a User with a reason
- View Applica on Permissions

2.2 Assigning Roles to a User

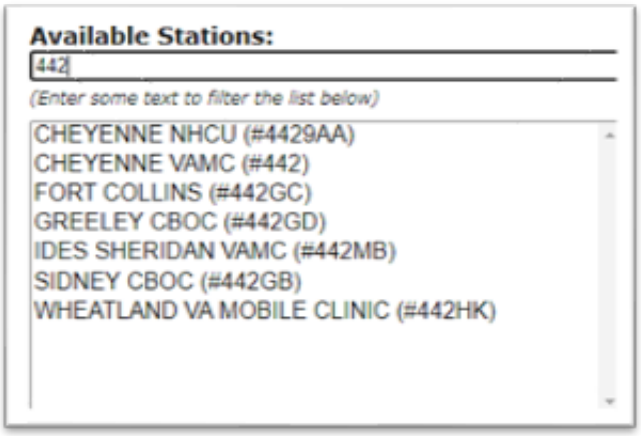
Assign the appropriate role(s) to each user. This determines the ac ons the user will be allowed to perform within PCMM Web.

- **Available Roles** – From this list of **Available Roles**, the authorized user will assign the appropriate Role(s) for each user and a user can have 1 or more roles assigned to perform assigned tasks.
- **Assigned Roles** – This displays all roles the user has been assigned.
- The authorized user will be allowed to move a selected role from the **Available Roles** sec on to the **Assigned Roles** sec on for the new/exis ng user by:
    - Select one or more roles and press the spacebar.
    - Select one or more roles and click the single arrow (Assign SELECTED or Unassign SELECTED)
    - Double-click a role from one area to the other.
    - Click the double arrow (Assign ALL or Unassign ALL) which moves ALL roles from one area to the other.
- Each user MUST have at least 1 Role assigned.

2.3 Assigning Sta ons to a User

In the **Available Sta ons** text box, enter a sta on number and the system will display the parent sta on as well as all substa ons. Click the double arrows to assign/unassign all of the listed sta ons. Or, move individual sta ons from one area to the other.

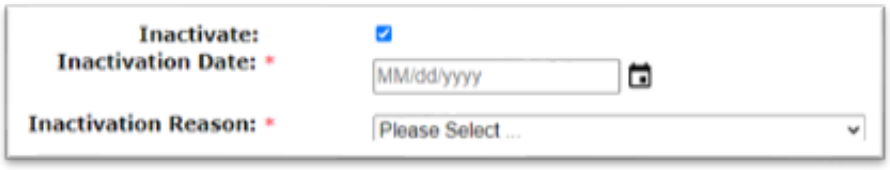
Figure 16 - Available Sta ons Screen



2.4 Inac va ng a User

1. Select the **Inac vate** check box to inac vate a user from PCMM Web. All users are setup ini ally as *Ac ve* but can be changed by selec ng the **Inac vate** check box.
   - If the check box is selected, the user is unable to log into the PCMM Web system and an error message is displayed, indica ng the user is Inac vated and unable to log in.
2. Select the calendar icon in the **Inac va on Date** field to inac vate a user by a specific date. The date should not be prior to the date the new user informa on is created. This op on is not available when crea ng a new user.
   - The Inac va on Date for an exis ng user can be established for a future or past date but cannot be before the user is created as a PCMM Web user. This field is not shown unless the Ac va on Indicator is selected.
3. Select the reason for a user to become inac ve from the **Inac va on Reason** drop-down list. This feature is not available when crea ng a new user.
4. When inac va ng a user, there MUST be 1 role and 1 sta on assigned to the user upon inac va on.
5. Traveling Veteran Coordinator (TVC) and VISN Coordinators should have a basic role assigned such as Reports Only when inac va ng these users.

Figure 17 - Inac va ng a User Screen



2.5 Assigning Time Zone

The me zone is assigned automa cally coordinated to the user's computer.

2.6 Viewing Applica on Permissions

Expand the **View Applica on Permissions** toggle link to display a list of the user's roles and permissions.

3 Team Management

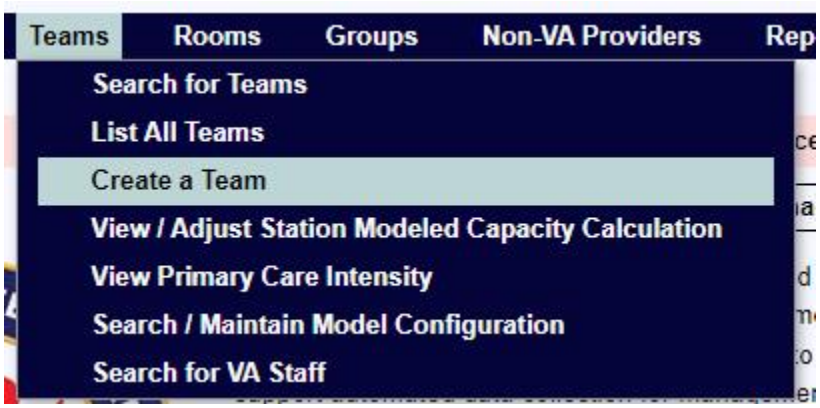
Teams consistent of staff members organized by care type (i.e., Primary Care, Mental Health) and aligned around a pa ent, including providers across mul ple VA sites and in non-VA se ngs for efficient care coordina on and communica on.

3.1 Create a Team Profile

A user can create a new team using the Create a Team Profile screen.

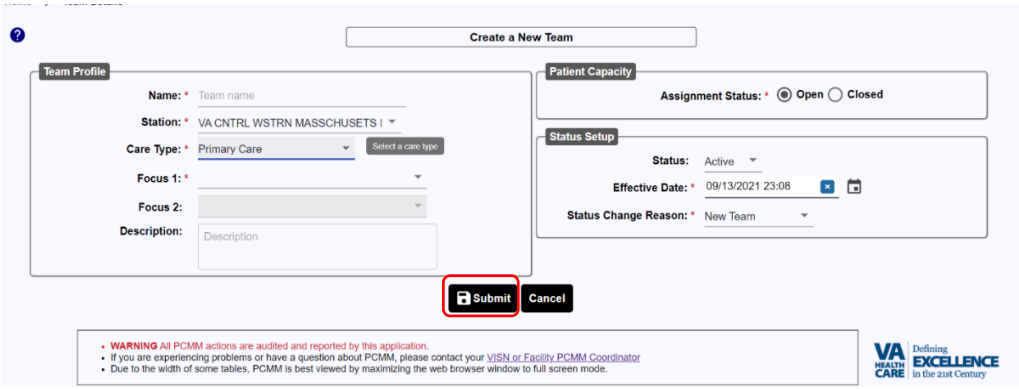
1. From the Team drop-down menu, select **Create a Team**. Alterna vely, click the **Create a Team** bu on at the top of the *Teams List* screen (**Teams** > **List All Teams**). The *Create a New Team* screen will display.

Figure 18 - Create a Team Menu Op on Screen



The following screenshot is an example of a Primary Care Team. For other Care Types, the op ons and fields in the Pa ent Capacity sec on will vary.

Figure 19 - Create a New Team Screen



3.2 Team Profile Sec on

1. Enter a name for the new team (required) in the **Team** text box. Team names must be between 3 and 30 characters. If the team name already exists for the site, an error message will appear. Teams do not span mul ple sites.
2. Select the sta on the team is associated with from the **Sta on** drop-down list.
3. Select the specific team care type from the **Care Type** drop-down list. The care type available are:
   - Primary Care
   - Primary Care - HBPC
   - Case Management
   - Community Care
   - InPa ent SCI
   - Mental Health
   - NON-PC Specialty (MED/SURG)
   - NON-VA Care
   - Integrated Case Management (only 1 team allowed per 3 digit sta on)
4. Once a team is created, the CARE TYPE and sta on number cannot be modified.
5. The Primary Care type requires a Focus and an op onal second Focus. Select a choice from the **Focus 1** drop-down list. Select another choice from the **Focus 2** drop-down list, if applicable. ***Note:*** *Focus 2 cannot be the same value as Focus 1.*
6. Case Management, Mental Health, Community Care, and NON-PC Specialty (MED/SURG) have an op on for a Focus. Select a choice from the **Focus** drop-down list. Primary Care – HBPC does not require a focus.
7. Enter a **Descrip on**, if desired.

3.3 Pa ent Capacity sec on

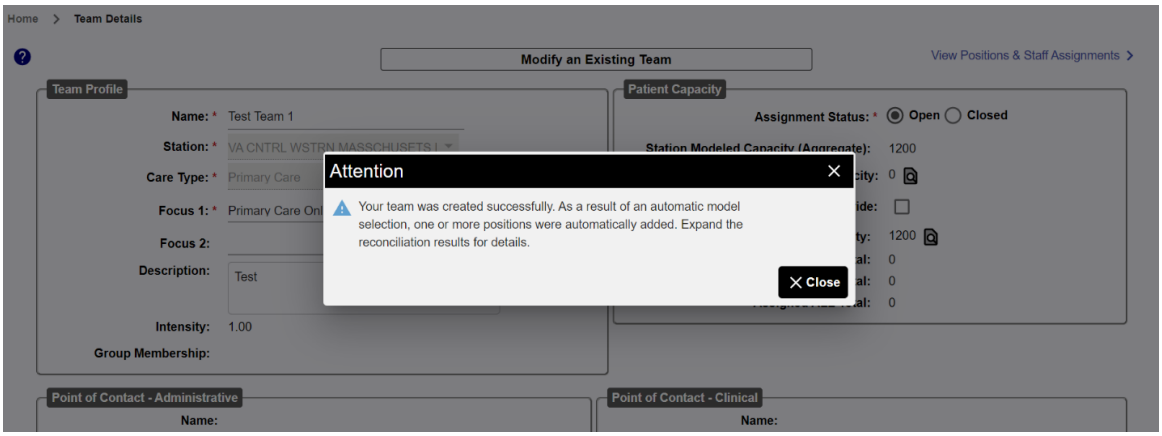
1. Ensure the **Assignment Status (Open)** radio bu on is selected.

3.4 Status Setup sec on

1. The **Select Status** drop-down defaults to **Ac ve**. If needed, select **Inac ve** to make the team inac ve.
2. The **Effec ve Date for Status Change** drop-down defaults to the current date and me. Click the Calendar icon to change the effec ve date.
3. The Select Status Change Reason drop-down defaults to New Team.

4. These **Status Setup** fields may be edited on the **Create a New Team** screen when a team is created. The ac va on date and reason are captured in Team History.
5. Click **Submit**, or **Cancel** to exit.
6. Once the team is created, the Modify an Exis ng Team screen is displayed with a pop-up confirming the team was created successfully. Some team roles may be added due to the automa c model selec on. If this confirma on text is not present, the setup was not completed correctly.

Figure 20 – Team Crea on Confirma on and display of Modify an Exis ng Team Screen



3.4.1 Point of Contact – Administra ve sec on

Displays the administrator staff member, including a phone number and email address, assigned to the team. POC is assigned at the Team Role (Posi ons) level. This sec on displays once Team Roles are established.

3.4.2 Point of Contact – Clinical sec on

Displays the point of contact staff member, including phone number and email address, assigned to the team. The POC is assigned at the Team Role (Posi ons) level. This sec on displays once Team Roles are established.

3.4.3 Non-Primary Care Teams:

- The Aggregated Modeled Team Capacity calcula ons will not be applied to Non-Primary Care teams and therefore, will not be displayed in the Pa ent Capacity sec on.
- If the team created is NOT a Primary Care Team, a user can manually enter a panel size on the View/Adjusted Modeled Capacity screen. This number will display in the Pa ent Capacity sec on as the Team Capacity

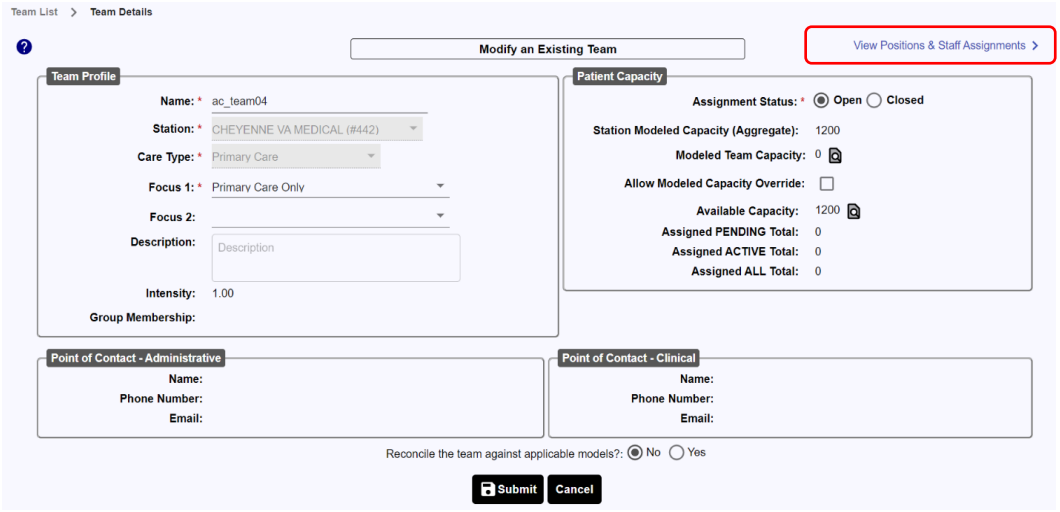
3.5 Create a Team Role (Posi on) Profile

When a new team is created using the team type of Primary Care, the team roles of Primary Care Provider, Care Manager, Clinical Associate and Administra ve Associate and their Surrogate roles will auto-populate. When crea ng specific team profiles (i.e., Mental Health), certain team role (posi ons) are created according to the automa c model selec on chosen. A

user must set up team roles that will act as preceptors prior to se ng up Associate Providers (preceptees).

1. From the *Modify an Exis ng Team* screen, click the **View Posi ons & Staff Assignments** link. The *Posi on List* screen will display.

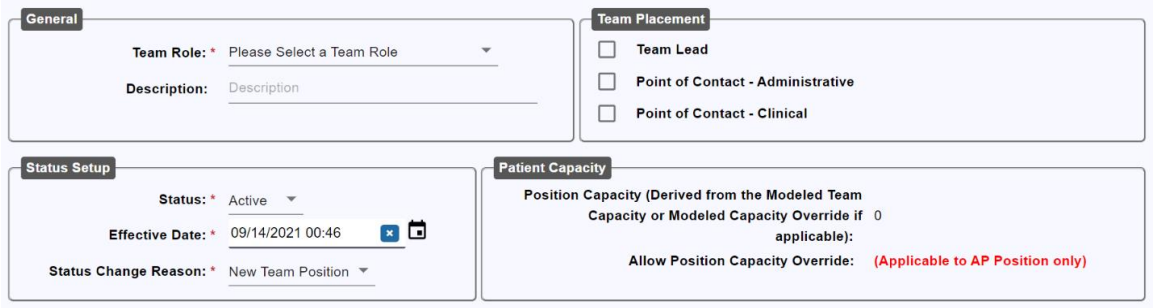
Figure 21 - View Posi ons & Staff Assignments



2. Click the **Create a Posi on** bu on to display the *Create a Posi on* screen.
   - The team must have a status of *Ac ve*

Figure 22 – Posi on List Screen with the Create a Posi on Bu on Selected

Figure 23 - Create a New Posi on Screen



3.6 General Sec on

1. Select a role (e.g., Clinical Pharmacist Prac oner, Associate Provider, Social Worker, etc.) from the **Team Role** drop-down list. A Team Role may be established more than once within the team. The *Descrip on* may be used to differen ate between two iden cal roles. See Table 2 below for a list of team roles.
   - For a team with a Focus of Primary Care, there may only be one teamlet role of *Primary Care Provider, Care Manager, Clinical Associate*, and *Administra ve Associates* for each PACT. See the Preceptor/Preceptee Rela onships sec on for more informa on.
   - Addi onal Team Roles may be established more than once within the team.
2. Enter a descrip on of the team role in **Descrip on** text box. The maximum length is 250 characters.
3. Enter the FTE number the team role would be expected to provide for in the **Expected FTE** field. It must be greater than 0.00 and it cannot be greater than 1.00.

Table 2- Assignable Team Roles

Addic on Therapist	Physician-A ending	(Mhtc) Advance Prac ce Nurse
Administra ve Associate	Physician-Psychiatrist	Advance Prac ce Nurse
Administra ve Coordinator	Physician-Subspecialty	Recrea on Therapist
Associate Provider	Primary Care Provider	Advance Prac ce Associate Provider
Care Manager	Psychologist	Peer Support Appren ce
Case Manager	Registered Nurse (Rn)	Clinical Pharmacist Prac oner
Chaplain	Rehab/Psych Technician	Fellow
Clinical Associate	Resident (Physician)	Surrogate Clinical Associate
Clinical Nurse Specialist	Social Worker	Surrogate Primary Care Provider
Clinical Pharmacist	Trainee	(Mhtc) Peer Support Specialist
Wh Primary Care Provider	Voc Rehab Spec/Counselor	Surrogate Associate Provider
Registered Die an	Homeless Case Manager	Surrogate Administra ve Associate
Health Technician	Polytrauma Case Manager	Chaperone
Licensed Professional Counselor	Sci Case Manager	Medical Director
Licensed Prac cal Nurse (Lpn)	Mhicm Case Manager	Rehabilita on Therapist
Licensed Voca onal Nurse (Lvn)	Vist Coordinator	Mh Provider
Marriage And Family Therapist (M)	(Mhtc) Addic on Therapist	Care Coordinator
Clerk	(Mhtc) Chaplain	Other Mh Provider

Medical Student	(Mhtc) Clinical Nurse Specialist	Pact-Smi Mh Provider
Surrogate Care Manager	(Mhtc) Clinical Pharmacist	Respiratory Therapist
Nurse Prac oner	(Mhtc) Licensed Professional Counselor	Surrogate Medical Director
Nurse Prac oner Associate Provider	(Mhtc) Marriage And Family Therapist	Provider
Occupa onal Therapist	(Mhtc) Nurse Prac oner	An coag Clinical Pharmacist
Lead Coordinator	(Mhtc) Occupa onal Therapist	Intermediate Care Technician (Ict)
Transi on Pa ent Advocate	(Mhtc) Physician Assistant	Service Chief
Program Manager	(Mhtc) Psychiatrist	Scheduler
Other	(Mhtc) Psychologist	Triage Specialist
Pa ent Services Assistant	(Mhtc) Recrea on Therapist	Physical Therapist
Peer Support Specialist	(Mhtc) Registered Nurse	Whole Health Coach
Physician Assistant	(Mhtc) Rehab/Psych Technician	Telehealth Clinical Technician
Physician Assistant Associate Provider	(Mhtc) Social Worker	Scribe
	(Mhtc) Voc Rehab Spec/Counselor	

3.7 Status Setup Sec on

1. Change the status if desired using the **Select Status** drop-down list (*Ac ve* is selected by default).
2. Select the calendar icon next to the **Effec ve Date for Status Change** field to select the date and me the team role will be effec ve. (present date and me are shown by default). The date cannot be prior to the team's crea on date.
3. Select a reason for crea ng the team role from the **Select Status Change Reason** the drop-down list (*New Team Posi on* is selected by default).

3.8 Team Placement Sec on

1. Select the **Team Lead** check box to make a team role the team lead. There may only be one ac ve Team Lead per team.
2. Select the **Point of Contact - Administra ve** check box to make a team role the primary point of contact for the team. There may only be one ac ve primary point of contact per team.
3. Select the **Point of Contact - Clinical** check box to make the team role the secondary point of contact for the team. There may be mul ple secondary points of contacts.

3.9 Pa ent Capacity Sec on

1. The **Posi on Capacity** number is the allowed pa ent capacity for the calculate team model.
2. For Specific Team Roles Only According to Team Care Type. To override the allowed pa ent capacity number, select the **Allow Posi on Capacity Override** check box.

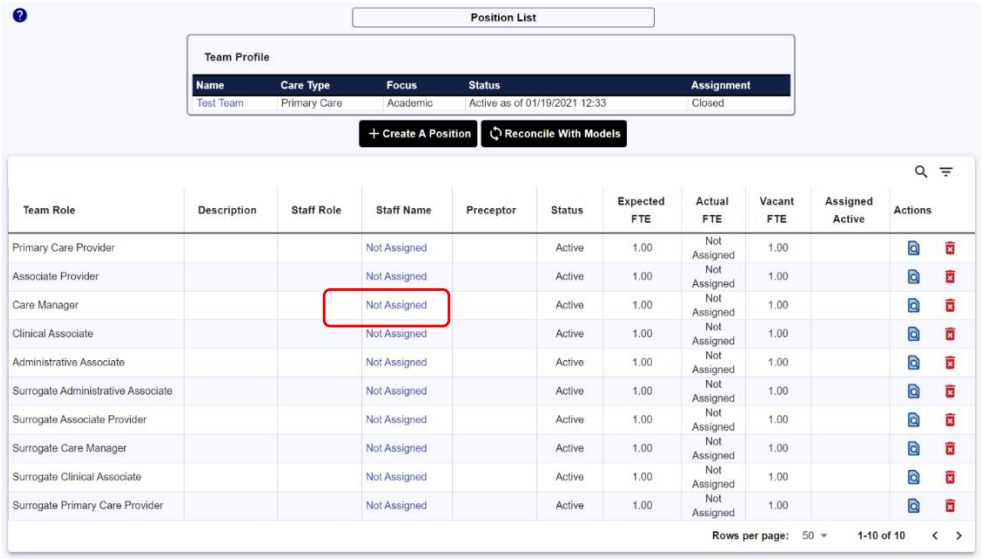
3. For Specific Team Roles Only According to Team Care Type. Enter the number of pa ents that will be allowed to be assigned to the team in the **Posi on Capacity Override** text box.
4. For Specific Team Roles Only According to Team Care Type. If desired, enter a jus fica on for the override in the **Jus fica on** text box.
5. Click the **Submit** bu on to save the informa on to the database.
6. Click the **View/Edit the No fica on Distribu on Rules** link to view a list of no fica on types and se ngs for the team.

4 Assign Staff to a Team Role (Posi on)

4.1 From the Modify an Exis ng Team page

1. Click the **View Posi ons and Staff Assignments** link. The *Posi on List* screen will display.
2. Click a **Not Assigned** link in the Staff Name column to display the *Assign Staff to a Posi on* screen. The team role must be ac ve.

Figure 24 - Assign Staff to a Posi on Screen



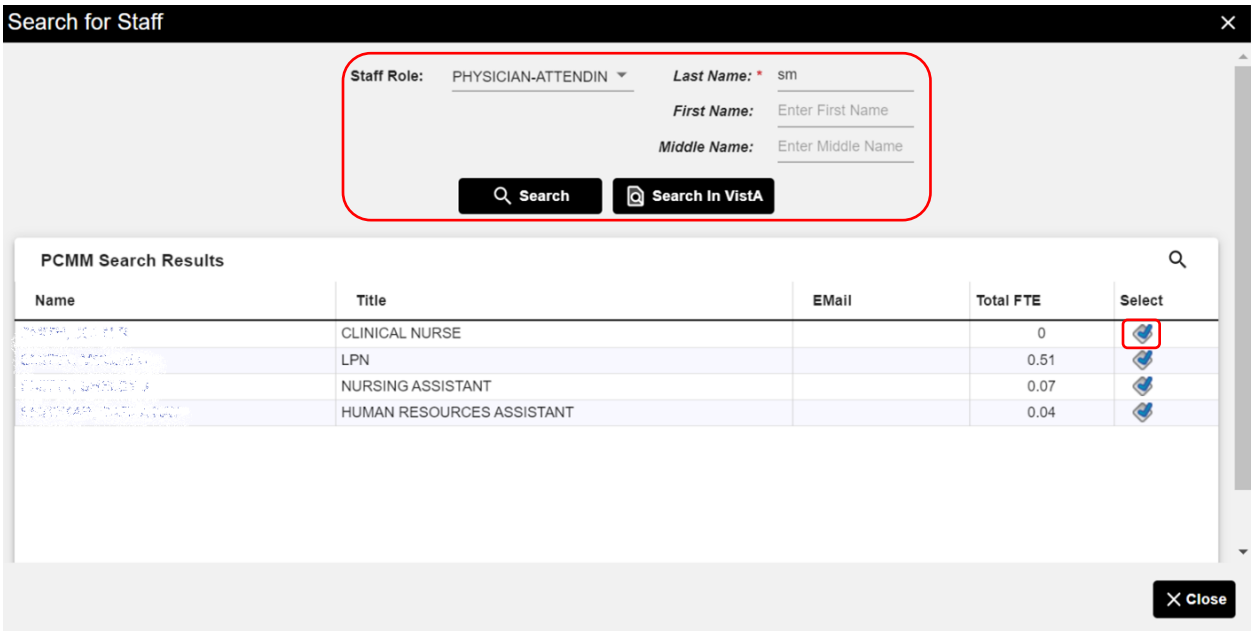
3. Enter all or part of a staff member's last name (with a minimum of 2 le ers), select a **Staff Role** and click **Search**. If no staff member is found, click the **Search VistA** bu on for Vista mapped sta on or **Search Cerner** for Cerner mapped sta on. To assign a staff member, click the **Select** icon. The *Staff Informa on* screen will display.

   - **Note:** If the Staff Role has been indicated for the team role, the staff member must match the person class for the assignment to occur. If the staff role has not been indicated for the team role, the staff member must match the person class for the Staff Role Provider Type(s) for the assignment to occur.

- PCMM Web will validate the person class of the staff members assigned to the staff roles associated with the team roles of Primary Care Provider, Associate Provider, Care Manager, and Clinical Associate.
- The PCMM Web VistA/Cerner staff search will now display all staff members with the same last name in the search for staff results table even if the SSN field is blank in VistA/Cerner.

4. Enter the Last Name with the First Initial of the First Name up to the FULL First Name of the staff member to narrow the search results (e.g., Smith, J or Smith, Jo or Smith, Jones)

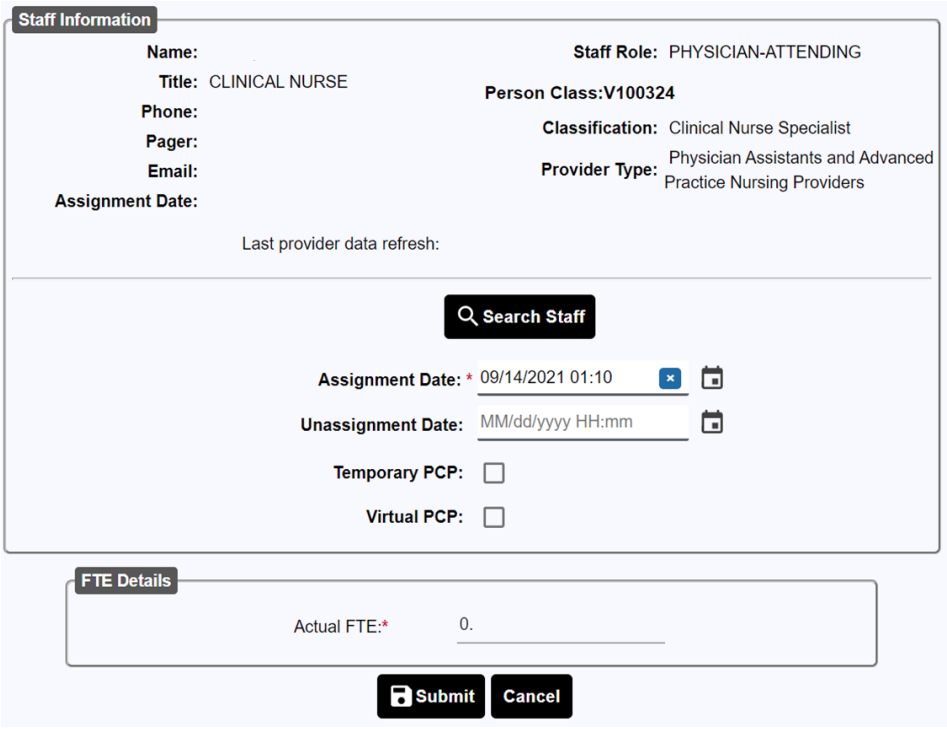
Figure 25 - Search for Staff Role



5. The **Assignment Date** field will default to the current date. To override, click the calendar icon and select a date and time. The date cannot be prior to the team role's creation date. If needed, click the calendar icon next to the **Unassignment Date** field to add an unassignment date.
6. Enter a number in the **FTE** field. The FTE for the staff member assigned to this team role cannot be greater than 1.00 across all roles/teams to which he or she is assigned within a station or within station(s) with the same first three digits of the station number (i.e., the parent station).
   - Expected FTE is the portion of a full time equivalent *required* to support the team and will default to 1.0 and may be edited to reflect a value of no less than 0.01. NOTE: Expected and Actual FTE values should be between 0.01 and 1.0. If no FTE is required, this value can be left blank.
   - Actual FTE is the portion of the full time equivalent *available* to support the team.
   - The Vacancy FTE is the difference between the Expected and Actual FTE and cannot be edited.
   - If there is no staff available for a required team role, the Expected FTE value displays as 1.00 by default and the Actual FTE value displays as NOT ASSIGNED.

7. Primary Care Provider Posi ons Only. Select the **Temporary PCP** check box to iden fy staff temporary covering the Primary Care Provider (i.e., Locums, Gap providers).
8. When the PCP is providing TelePACT (virtual PCP), select the **Virtual PCP** check box.

Figure 26 - Staff Informa on Screen

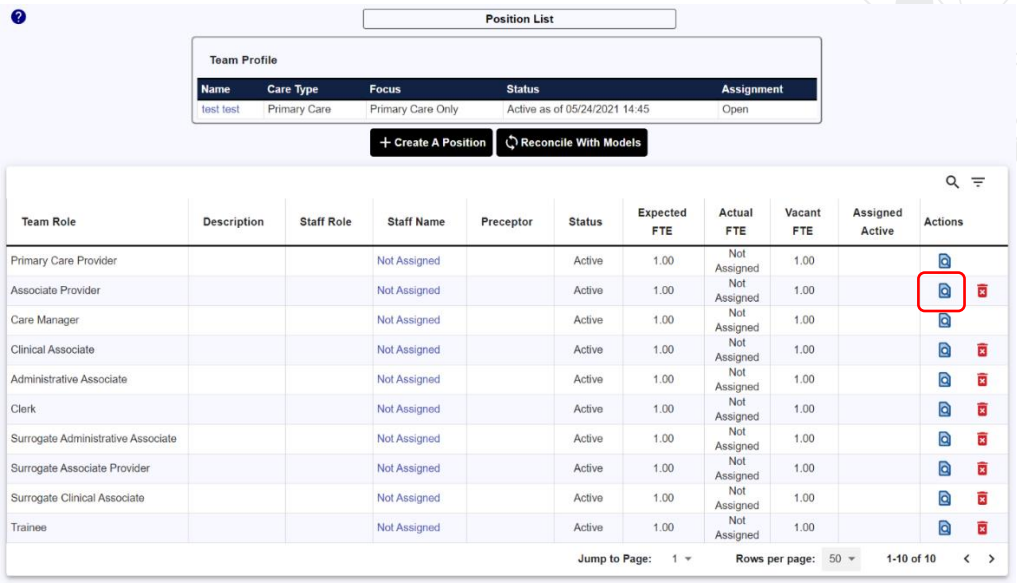


9. Click **Submit** to con nue, **Cancel** to cancel. A success message and the staff member's name will display in the **Staff Name** column.

4.2 From the Modify an Exis ng Posi on screen

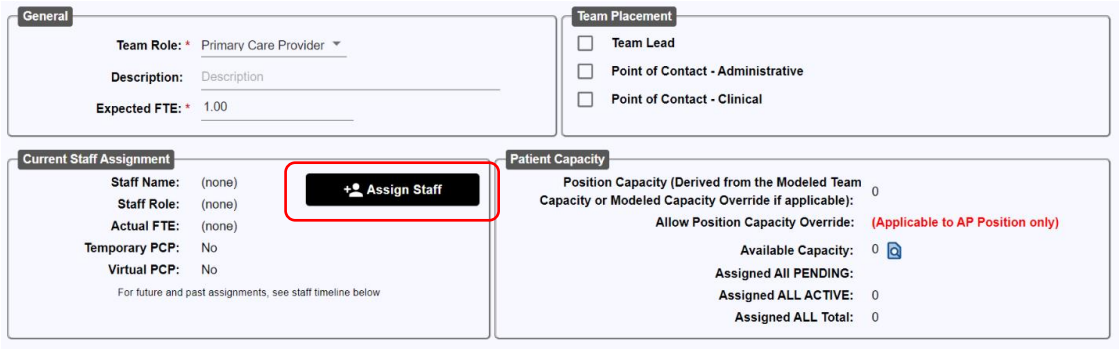
1. Click **View Posi ons and Staff Assignments**. The *Posi on List* page displays. Click icon in the **Ac ons** column that corresponds to the team role.

Figure 27 - Posi on List Screen with the Ac on Icon Selected



2. The *Modify an Exis ng Posi on* screen will display. The *Current Staff Assignment* sec on will display *Staff Name, Role* and *Actual FTE*. Click the **Assign Staff** bu on to assign a staff member to the team role.

Figure 28 - Modify an Exis ng Posi on Screen with the Assign Staff Bu on Selected



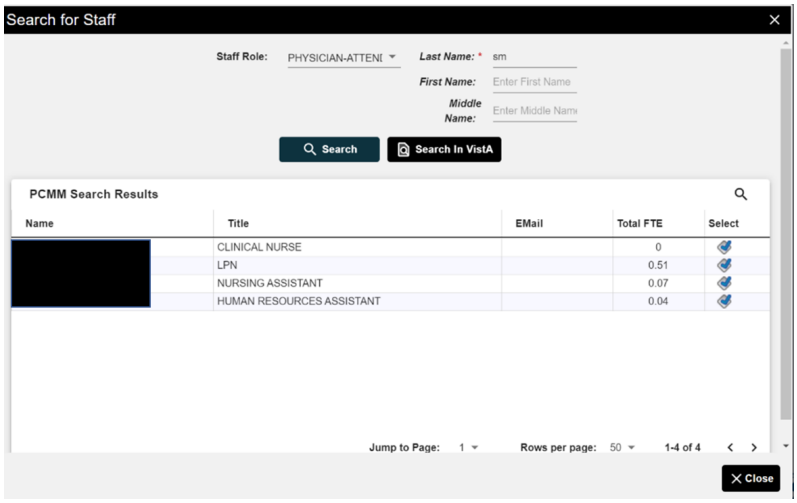
3. The *Search for Staff* dialog box displays. Enter all or part of a staff member's last name (with a minimum of 2 le ers), select a **Staff Role**, and click **Search**. If no staff member is found, click the **Search VistA** bu on for Vista mapped sta on or **Search Cerner** bu on for Cerner mapped sta on. To assign a staff member, click the **Select** icon. The *Staff Informa on* screen will display

4. The Staff Role is displayed and can be edited.

   - **Note:** If the staff role has been indicated for the team role, the staff member must match the person class for the assignment to occur. If the staff role has not been indicated for the team role, the staff member must match the person class for the Staff Role Provider Type(s) for the assignment to occur.

   - PCMM Web will validate the person class of the staff members assigned to the staff roles associated with the team roles of Primary Care Provider, Associate Provider, Care Manager, and Clinical Associate.

Figure 29 - Search for a Staff box with Staff Informa on Selected.



5. Follow the steps described above to assign the staff member to the team role.
6. When the assignment is created; the assignment date/status/reason will be captured in History.

4.3 Mental Health Team Specifics

When assigning a staff member to a mental health team, each staff member is allowed to be assigned to more than one team role on the same team. This is needed since the staff member may serve as Mental Health Treatment Coordinator (MHTC) to some patents and not others.

5 Preceptor/Preceptee Rela onships

Some of the roles are not licensed to provide medical care on their own but can when they are supervised by another licensed role. This supervision is called a "precept/preceptee rela onship" and is always between two staff members in corresponding roles. The supervising member is called the "Preceptor" and the supervised is called the "Preceptee".

Table 3 - Preceptor/Preceptee Rela onships

Preceptor		Preceptee		
If the selected Role is Resident (Physician), Nurse Practitioner (NP), or Clinical Nurse Specialist	then	A user must indicate this team role needs to be associated with a staffed preceptor team role on the team in order to save the team.	>	A message to indicate that there is not a corresponding staffed preceptor team role currently available will be displayed if there is no current preceptor team role assigned.
If the Team PCP Role is **Nurse Practitioner** and is staffed	then	It may precept the Associate Provider **Nurse Practitioner Student**.		
If the Team PCP Role is Physician Assistant and is staffed	then	It may precept the Associate Provider Team Role of **Physicians Assistant Student**		

Preceptor		Preceptee		
If the Team PCP Role is **Physician – <<Name>>** and is staffed	then	• It may precept all Associate Provider staff roles. • Physician Residents can be assigned to the Associate Provider Team Role only.		

Whenever a preceptor relationship is assigned or unassigned, history regarding the preceptor, the preceptee and their respective staff assignments and dates will be captured in the History.

1. If the team role has an Active Preceptor or Preceptee assignment, the team role cannot be inactivated until all preceptor/preceptee assignments are removed.
2. If the team role is a Preceptor, in order for the Status to be updated from Active to Inactive – all Active Preceptee Assignments for the team role must be unassigned.
3. If the team role is a Preceptee, in order for the Status to be updated from Active to Inactive – all Active Preceptor Assignments for this team role must be unassigned.

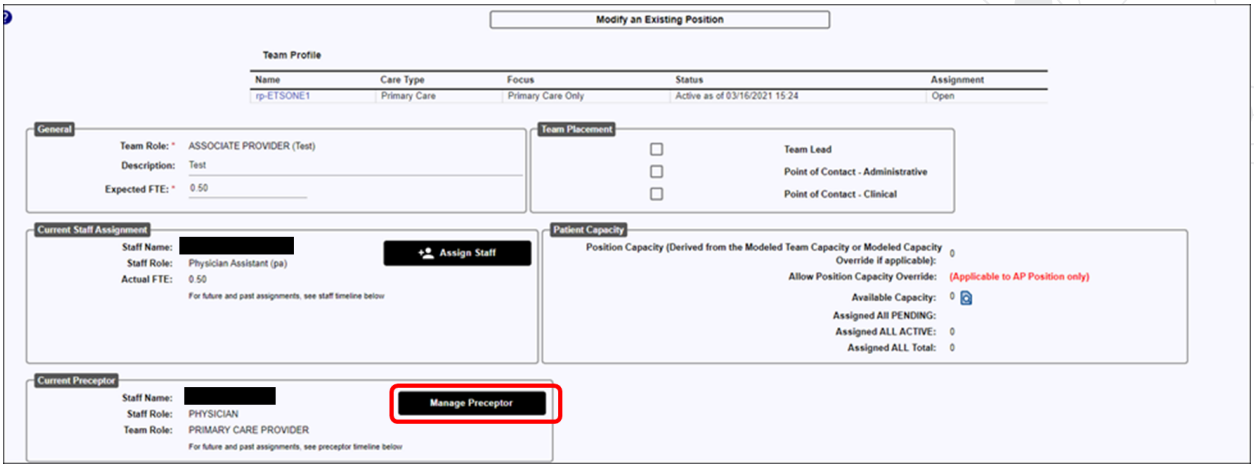
5.1 Assigning a Preceptor/Preceptee

The user can setup and staff team roles that act as preceptors first and also to exist for the preceptees. The ability to establish a preceptor relationship cannot occur until both preceptee and preceptor roles are established and are staffed.

A user can assign a Preceptor to a team role:

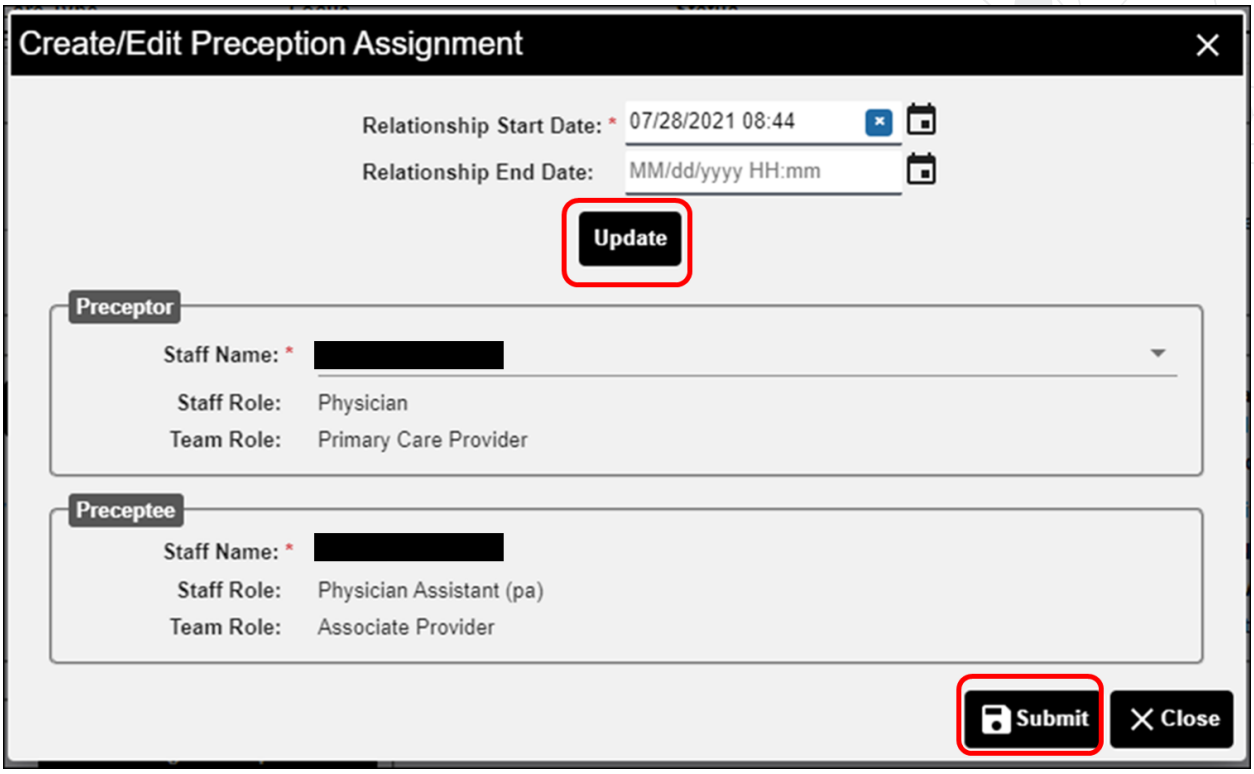
1. From the *Modify an Existing Position* screen (locate the *Current Preceptor* section. Current Preceptor information is read-only on this screen. Click the **Manage Preceptor** button.
   - **Note:** Alternatively, if there is an existing Preceptor assignment, click the **Add Preceptor Assignment** button in the Preceptor Assignment Timeline section. Add a staff member only if more than one staff member is authorized to be a preceptor.

Figure 30 - Modify an Existing Position Screen with the Manage Preceptor Button Selected.



2. The *Create/Edit Precep on Assignment* dialog box is displayed with the current informa on:
   - Click the calendar icon next to the **Rela onship Start Date** field (required) to edit the start date. The current date/ me is the default. A past date cannot be used.
   - Click the calendar icon next to the **Rela onship End Date** field to enter an end date. This is not required, but a past date cannot be used.
   - Click the **Update** bu on to update the dates.
   - Preceptor informa on:
     - The current staff member is displayed in the **Staff Name** drop-down list.
     - Staff Role: Read-only
     - **Team Role:** Read-only
   - Preceptee informa on:
     - Staff Name: Read-only
     - Staff Role: Read-only
     - **Team Role:** Read-only
3. Click **Update** or click **Submit** to change the dates or Preceptor Staff Name. Click **Cancel** to cancel.

Figure 31 - Create/Edit Precep on Assignment Screen



4. A message will display to indicate the preceptor assignment was successful and the assignment/update data will be displayed in the Current Preceptor sec on. Click **Close** to close the dialog box.

5.2 Preceptor Assignment Timeline

A user can edit an entry or add a new entry using this sec on.

To **Edit** an entry:

1. Click the **Edit** icon in the **Ac ons** column.
2. The *Create/Edit Precep on Assignment* dialog box is displayed with the current informa on.
3. Modify the appropriate informa on.

To **Inac vate** an entry:

1. Click the **Inac vate** icon (red X) in the **Ac ons** column.
2. The *Are You Sure?* dialog box displays. Click **Confirm** to confirm, **Cancel** to cancel.
3. The Preceptor will be inac vated.

To **Delete** the entry:

1. Click the **Delete** icon in the *Ac ons* column.
2. Login to VistA if prompted (if already logged in, the prompted will not display). Confirm the dele on.
3. The record will be deleted.

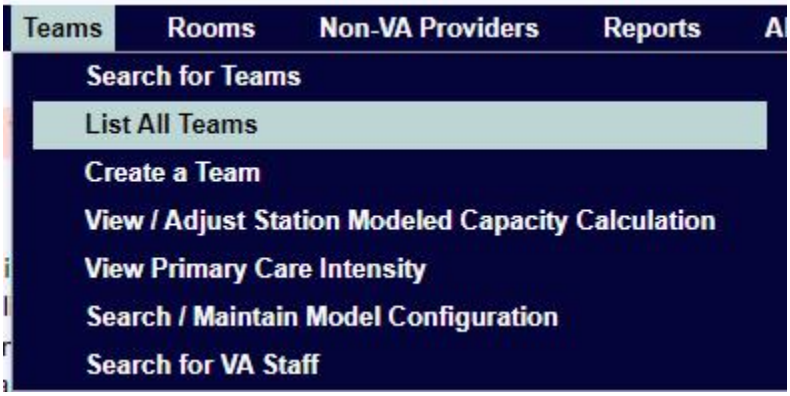
Figure 32 - Preceptor Assignment Timeline with Ac ons Icons Selected

6 Modify or View a Team Profile

PCMM Coordinators are able to modify and view teams.

1. Select **Teams** > **List All Teams** from the main menu to display the *Team List* page.

Figure 33 - List All Teams Menu Op on

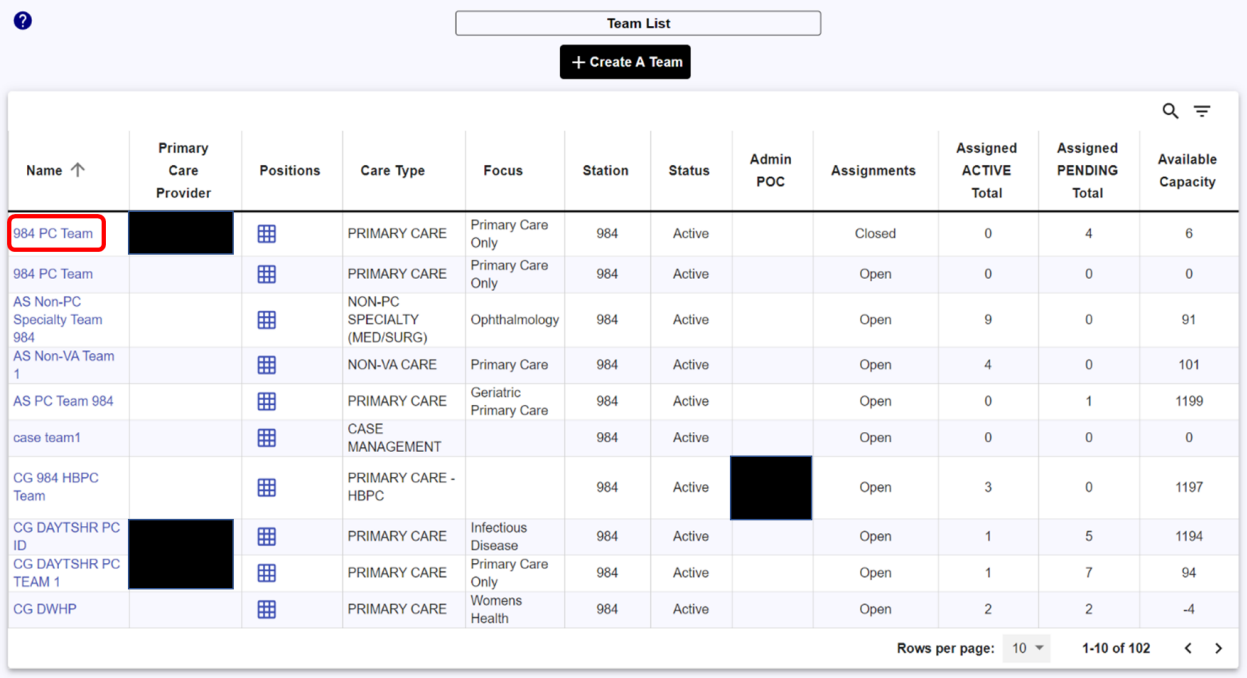


2. The following ac ons and informa on are available on the Team List page:
   - Team Name. Update a selected team by clicking the **Team Name**.
   - Sta on number
   - Primary Care Provider. Email a **Primary Care Provider** (if there is an email address available) by clicking the email envelope icon.
   - Access the **Posi on List** screen for the selected team by clicking the Posi ons icon.
   - Care Type
   - Focus (if there is a Focus 1 and a Focus 2 listed for the team, they will be listed in this column as Focus1 value/Focus2 value)
   - Sta on Number
   - Status
   - Admin POC and phone number. Contact an **Admin POC** by phone, or by email by clicking the email icon.
   - Assignment status
   - Assigned Ac ve Total

- Assigned Pending Total
- Available Capacity
- Generate a team by clicking the **Create A Team** bu on.

3. The team list will ini ally be displayed in order by Name and will include all teams. The list can be sorted by any column or narrowed by applying filter values for Care Type, Focus, Sta on, Status and Assignments.
4. To modify a team, click on a **team name** link. The *Modify an Exis ng Team* page will display and the user has the op on to modify fields and op ons.

Figure 34 – Team List Screen with a Team Name Selected



5. Enter a new name for the team. If the new team name already exists for the site, an error message will appear.
6. Select a different **Focus 1** from the drop-down list.
7. Select a **Focus 2** from the drop-down list, or change the **Focus 2** selec on.
8. Change the Descrip on.
9. Click on the Group Membership name to view/change the group associated with the team.

6.1 Point of Contact – Administra ve sec on

Displays the administrator staff member, including a phone number and email address, assigned to the team. POC is assigned at the Team Role level.

6.2 Point of Contact – Clinical sec on

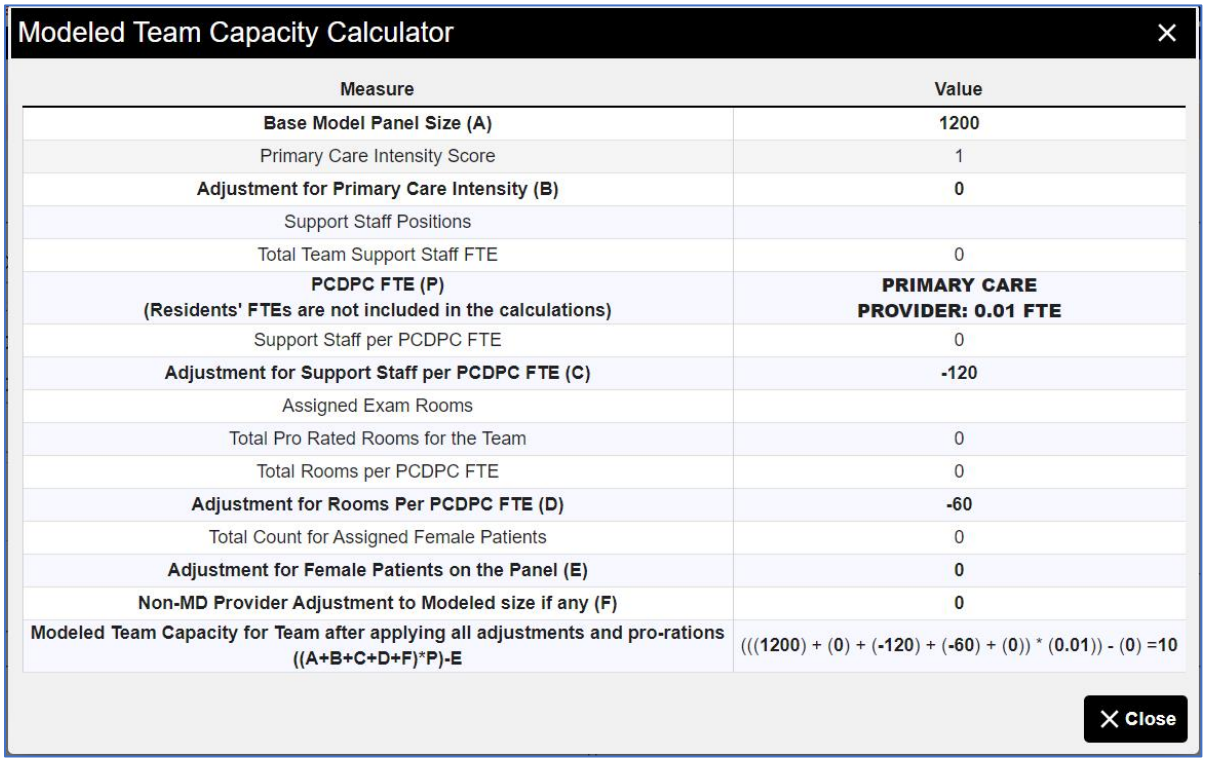
Displays the point of contact staff member, including phone number and email address, assigned to the team. The POC is assigned at the Team Role level.

6.3 Pa ent Capacity sec on

- **Note:** Some fields may *only* display according to the Care Type.

1. Change the **Assignment Status** to allow or disallow future pa ent assignments to this team. (***Open** is default*).
2. The maximum number of team pa ents allowed for a team displays in the **Team Capacity** field.
3. View the **Sta on Modeled Capacity (Aggregated)** number for the team. Click the magnifying glass icon that corresponds to the **Modeled Team Capacity** to view a complete calcula on.

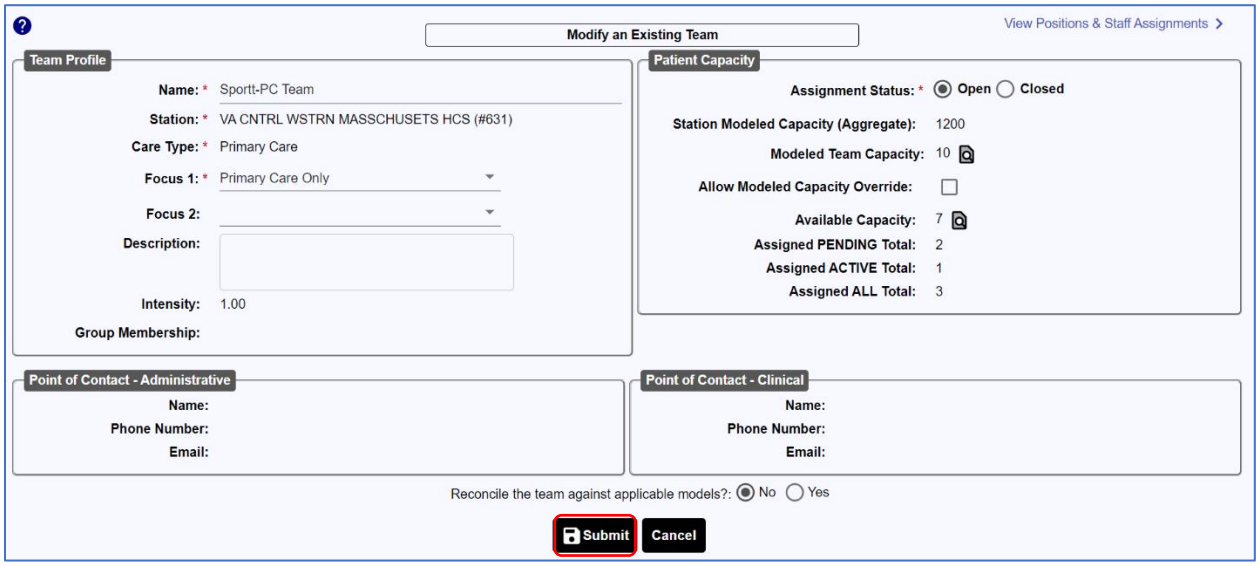
Figure 35 - View Team Modeled Capacity Calcula ons



4. Depending on Care Type and to override of the modeled capacity, select the **Allow Modeled Capacity Override** or **Allow Capacity Override** check box and enter a value in the **Modeled Capacity Override** or **Capacity Override** text box. Enter a reason for the override (mandatory) in the **Jus fica on** text box.
5. Click the magnifying glass icon that corresponds to the **Available Capacity** to view the available assignments. The system will iden fy the number of available assignments by calcula ng the difference between the sum of the pending and ac ve assignments from the team capacity.
6. The **Assigned PENDING Total** field displays the number of assignments with a pending status.

7. The **Assigned ACTIVE Total** field displays the number of assignments with an ac ve status.
8. The **Assigned ALL Totals** field displays the number of assignments available.

Figure 36 - Modify an Exis ng Team Screen



9. A confirma on message will display if any changes occur.
10. The **Reconcile the team against applicable models** op on will display on the Modify an Exis ng Team screen. The op on **No** is automa cally selected. Select **Yes** to view the reconcilia on results and the model linked to the team.

6.4 Non-Primary Care or Non-VA Teams

- The Aggregated Modeled Team Capacity calcula ons will not be applied to Non-Primary Care or Non-VA teams and therefore, will not be displayed in the Pa ent Capacity sec on.
- If the team created is NOT a Primary Care Team, a user can manually enter a panel size on the View/Adjusted Modeled Capacity screen. This number will display in the Pa ent Capacity sec on as the Team Capacity.

6.5 Status Change sec on

Users can change the team's status by clicking the View/Edit Complete Timeline link in the *Status Change Timeline* box near the bo om of the screen. NOTE: All pa ents must be unassigned from the team or explicitly assigned team posi on prior to inac va ng a team or team posi on.

6.6 Edit an entry

1. Select the **Ac ons** (pencil) icon that corresponds with the entry to edit.

Figure 37 - Status Change Timeline Screen

2. Select the status of entry from the **Status** drop-down menu.
3. Click the calendar icon next to the **Effec ve Date** field to select the date and me the status will be effec ve.
4. Select a reason for the team entry from the **Status Reason** drop-down list.
5. Click **Submit**, or **Cancel** to cancel the changes.

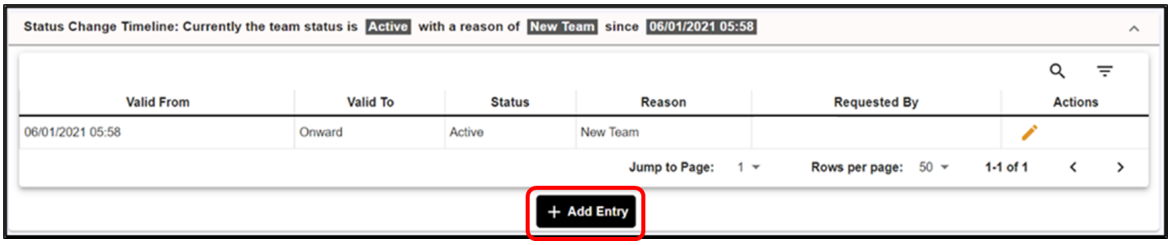
Figure 38 - Update Entry Box

6. A confirma on message will display. Click **Close**.

6.7 Add a new entry:

1. Click the **Add Entry** bu on.

Figure 39 - Status Change Timeline Screen with the Add Entry Bu on Selected



2. Select the status of entry from the **Status** drop-down menu.
3. Click the calendar icon next to the **Effec ve Date** field to select the date and me the status will be effec ve.
4. Select a reason for the team entry from the **Status Reason** drop-down list.
5. Click **Submit**, or **Cancel** to cancel the changes.

Figure 40 - Add Entry Box Defined and Submit Bu on Selected

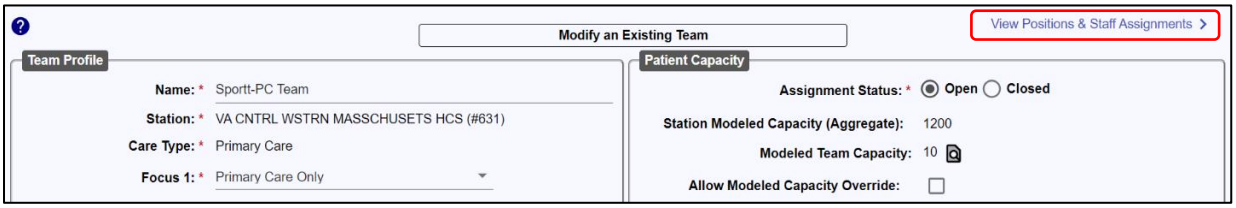
6. A confirma on message will display.
   - All Ac ve staff assignments and all Ac ve posi ons on the team will be automa cally unassigned and Inac vated when the Team is inac vated.
   - In order for the Status to be updated from Ac ve to Inac ve, all Ac ve team roles for the team must be unassigned.
   - If the Status is updated from Ac ve to Inac ve; the Inac ve Date must be greater or equal to the Ac ve Date.
   - The Status Date and Status Reason are required and must be entered any me the Status is changed.
   - The status history will also be shown in this list.

7 Modify or View a Team Role (Posi on)

A user can modify or view team role a ributes through the *Modify an Exis ng Posi on* screen. NOTE: For Primary Care care type, staff members can only be assigned one me to a team posi on and cannot be staffed in two different posi ons on the same team.

1. Locate the team to view.
2. From the *Modify an Exis ng Team* screen, click the **View Posi ons & Staff Assignments** link. *The Posi on List* screen will display.

Figure 41 - Posi ons & Staff Assignments Link Selected to View a Team Role

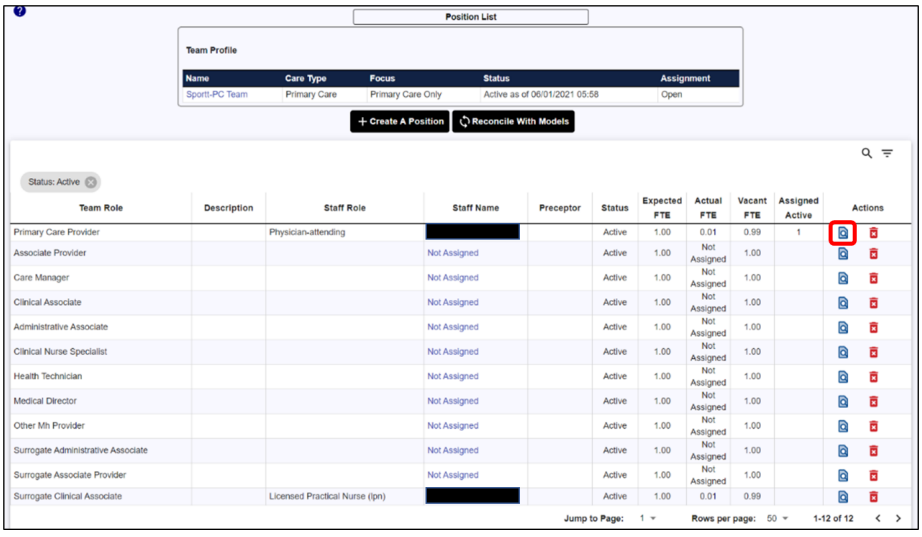


3. The following ac ons and informa on are available on the *Posi on List* screen:
   - Click the **Create a Posi on** bu on to create a new team role.

- Click the **Reconcile with Models** bu on to reconcile the team roles with the available team models.
- Team Role
- Staff Role
- Staff Name. Click the **Staff Name** link to view details about the staff member. For an unassigned team role, click the **Not Assigned** link to assign a staff member to a team role.
- Preceptor
- Preceptee(s)
- Status
- Expected FTE*
- Actual FTE*
- Vacant FTE*
- Assigned Ac ve
- Ac ons

4. View the team model by clicking the **View the Model linked to the Team** link. The team care type, focus, sta on, all model team roles and if the roles are required are displayed. Click **Close the Model** to hide this informa on.
   - FTE: Full Time Equivalent. A FTE of 1.0 and indicates that the team role is a full- me. A FTE of 0.5 indicates the team role will be available half- me.
5. Click the icon in the **Ac on** column that corresponds to the desired team role to update. The *Modify an Exis ng Posi on* screen will display.

Figure 42 - Posi on List with the Ac ons Icon Selected



7.1 General Section

The role in the **Team Role** drop-down list cannot be updated. A ***Team Role*** other than the required Qualifying Roles, may be established more than once within the team. The **Description** may be used to differentiate between two identical roles. Within some care types, if there are two staff roles on the team with the same role at the same time (active at a certain date), a message indicates the team is inconsistent.

- **Note:** Primary Care Provider (PCP), RN Care Manager, Clinical Associate, and Administrative Associate Primary Care qualifying roles are restricted to one per PACT.

1. Enter a description of the team role in **Description** text box. The maximum length is 250 characters.
2. Enter the FTE number the team role would be expected to provide for in the **Expected FTE** field. It must be greater than 0.00 and it cannot be greater than 1.00.

7.2 Current Staff Assignment

If there are staff members assigned to the team, the following information is displayed:

- Staff Name
- Staff Role
- Actual FTE
- Temporary PCP

1. Click the **Manage Staff** button to view the *Staff Information* screen. A user can reassign or unassign a staff member to a team role and update the FTE number.

7.3 Current Preceptor

If there is preceptor assigned to the team, the following information is displayed:

- Staff Name
- Staff Role
- Team Role

1. If a Preceptor is not assigned, click the **Manage Preceptor** button to display the check box to assign a preceptor. There may only be one Active *Primary Care* role per team.

7.4 Team Placement Section

1. Select the **Team Lead** check box to make the team role the team lead. There may only be one Active *Primary Care* role per team.
2. Select the **Point of Contact – Administrative** check box to make the team role the primary point of contact for the team. There may only be one active primary point of contact per team.

3. Select the **Point of Contact - Clinical** check box to make the team role the secondary point of contact for the team. There may be mul ple secondary points of contacts.

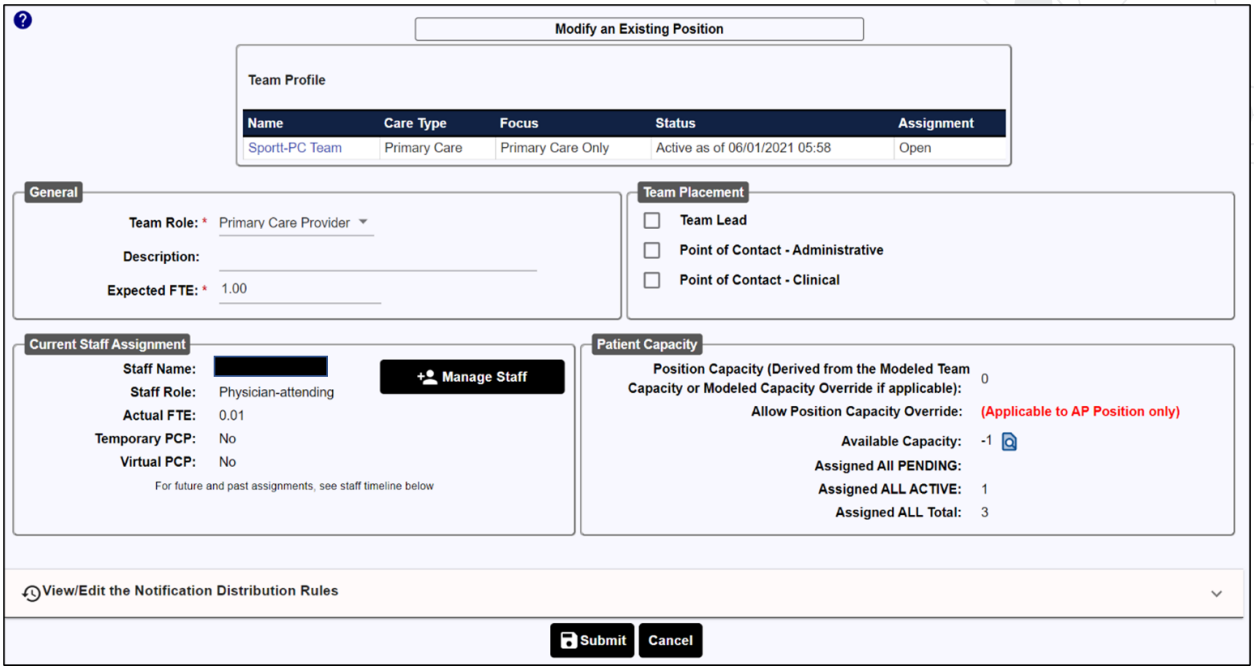
7.5 Pa ent Capacity Sec on

The system will automa cally display the allowed pa ent capacity for the calculated team model.

1. To override this number, select the **Allow Posi on Capacity Override** check box.
2. Enter the number of Pa ents that will be allowed to be assigned to the team in the **Posi on Capacity Override** text box.
3. If desired, enter a jus fica on for the override in the **Jus fica on** text box.
4. Click the magnifying glass icon that corresponds to the **Available Capacity** to view the available assignments. The system will iden fy the number of available assignments by calcula ng the difference between the sum of the pending and ac ve assignments from the team capacity.
   - The **Assigned PENDING Total** field displays the number of assignments with a pending status.
   - The **Assigned ACTIVE Total** field displays the number of assignments with an ac ve status.
   - The **Assigned ALL Totals** field displays the number of assignments available.
5. Click the **View/Edit the No fica on Distribu on Rules** link to view a list of no fica on types and se ngs for the team.
6. Click the **Submit** bu on to save the informa on to the database.
   - In order for the **Status** to be updated from *Ac ve* to *Inac ve*, all Ac ve Pa ent Assignments for the team role must be unassigned.
   - If the team role is a *Preceptor*, in order for the Status to be updated from *Ac ve* to *Inac ve,* all Ac ve Preceptee Assignments for the team role must be unassigned.
   - If the **Status** is updated from *Ac ve* to *Inac ve*; the Inac ve Date must be greater or equal to the Ac ve Date.
   - The **Status Date** and **Status Reason** are required and must be entered any me the Status is changed.
7. Open the **View Pa ent Assignments** sec on to view a list of pa ents assigned to the team. When selected, the **Historical Assignments** op on displays pa ents previously assigned to team.

8. To revert to the current list, select the **Current Assignments** op on.
9. To filter through the pa ent list, use the text box provided.
10. Quickly assign or reassign one or more pa ent to and from a team or a team role using the **Perform Batch Opera ons** bu on.
11. Click a pa ent name to view the *Pa ent Profile* screen.
    - **Note:** Since the pa ents are assigned to the en re team UNLESS the team has Associate Provider roles(s) established (the user can choose whether they want to assign the PCP or AP to the pa ent), the pa ent assignments will vary depending on how the team is set up and staffed.
    - A user can delete a team role that is not a part of the basic team model configura on, if no pa ents have been assigned to the team.
12. From the **Posi on List** screen, click the **delete** icon in the **Ac ons** column that corresponds to the team role.
    - If the delete icon is not present, either the team role is a required for the team model, and the team has been reconciled against that model, or there have been pa ents assigned to the team. The team role can be inac vated.
13. Open the **Staff Assignment Timeline** sec on to view a list of staff records moved from the Current Assignment.
    - The Staff Assignment Timeline includes the Staff Name, Staff Role, Actual FTE, End Date, Reason , Unassignment Reason (if applicable) of all staff members assigned to/unassigned from the team role.
    - A user can add, update and delete an entry in the Staff Assignment Timeline by clicking the icons or update an assignment by clicking the **New Assignment** bu on. The **New FTE Entry** bu on enables a user to update the FTE and Effec ve Date.
14. Open the **Preceptor Assignment Timeline** sec on to view a list of preceptor assignments.
    - The Preceptor Assignment Timeline includes the Start Date, End Date, Preceptor and Preceptee informa on. A user can edit or add a new preceptor from this list by clicking the **Add Preceptor Assignment** bu on.

Figure 43 - Modify an Exis ng Posi on Screen



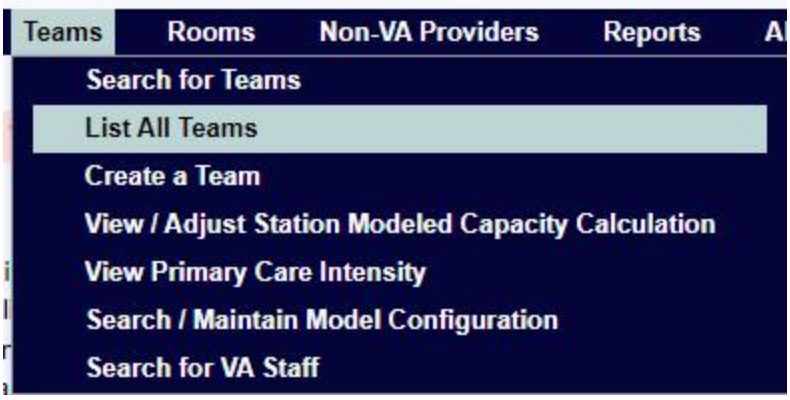
8 View or Modify Team Role (Posi on) History

A user can view a history of assignments and unassignments for a team role from the **Team List** and **Modify an Exis ng Team** screens

8.1 Team List screen

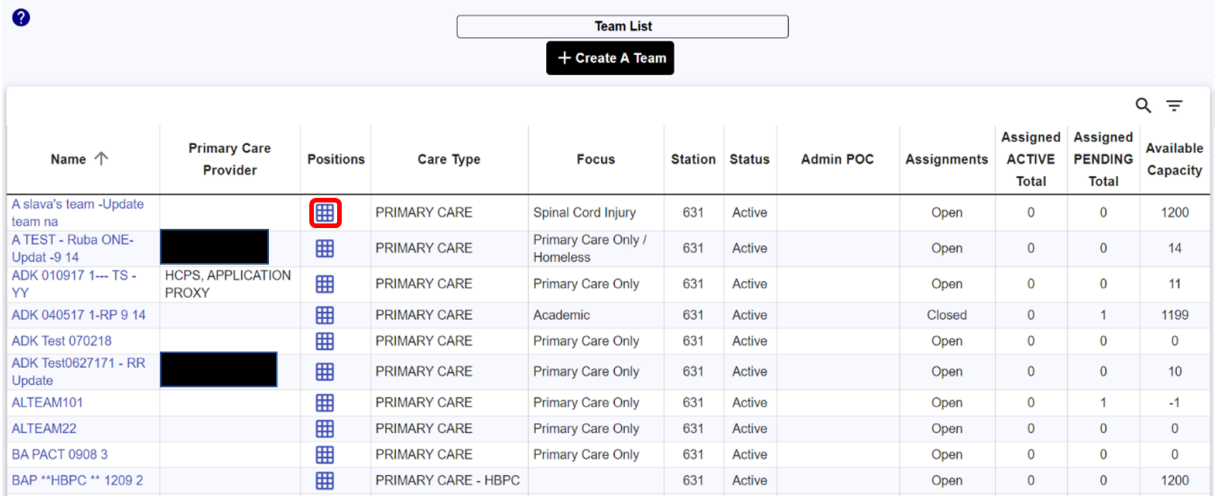
1. From the main menu, click **Teams** > **List All Teams** to display the *Team List* page.

Figure 44 - List All Teams Menu Op on



2. Click an item in the **Posi on** column for the desired team to display the *Posi ons List* page. The team must be ac ve.

Figure 45 - Create a Team Screen with the Posi ons Icon Selected

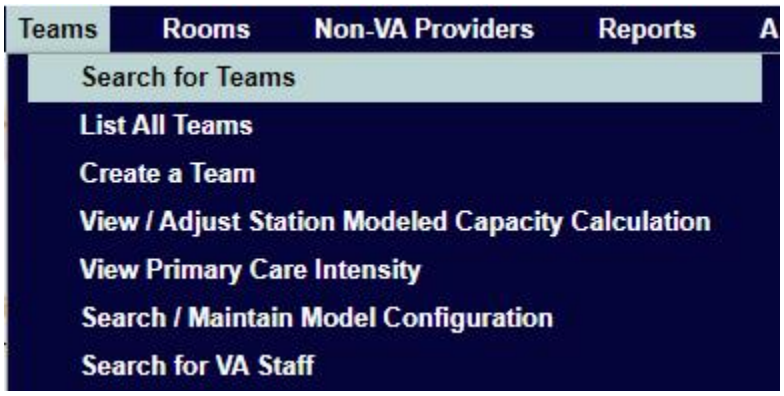


Name	Primary Care Provider	Positions	Care Type	Focus	Station	Status	Admin POC	Assignments	Assigned ACTIVE Total	Assigned PENDING Total	Available Capacity
A slava's team -Update team na			PRIMARY CARE	Spinal Cord Injury	631	Active		Open	0	0	1200
A TEST - Ruba ONE-Updat -9 14	[redacted]		PRIMARY CARE	Primary Care Only / Homeless	631	Active		Open	0	0	14
ADK 010917 1--- TS - YY	HCPS, APPLICATION PROXY		PRIMARY CARE	Primary Care Only	631	Active		Open	0	0	11
ADK 040517 1-RP 9 14			PRIMARY CARE	Academic	631	Active		Closed	0	1	1199
ADK Test 070218			PRIMARY CARE	Primary Care Only	631	Active		Open	0	0	0
ADK Test0627171 - RR Update	[redacted]		PRIMARY CARE	Primary Care Only	631	Active		Open	0	0	10
ALTEAM101			PRIMARY CARE	Primary Care Only	631	Active		Open	0	1	-1
ALTEAM22			PRIMARY CARE	Primary Care Only	631	Active		Open	0	0	0
BA PACT 0908 3			PRIMARY CARE	Primary Care Only	631	Active		Open	0	0	0
BAP **HBPC ** 1209 2			PRIMARY CARE - HBPC		631	Active		Open	0	0	1200

8.2 Modify an Exis ng Team screen

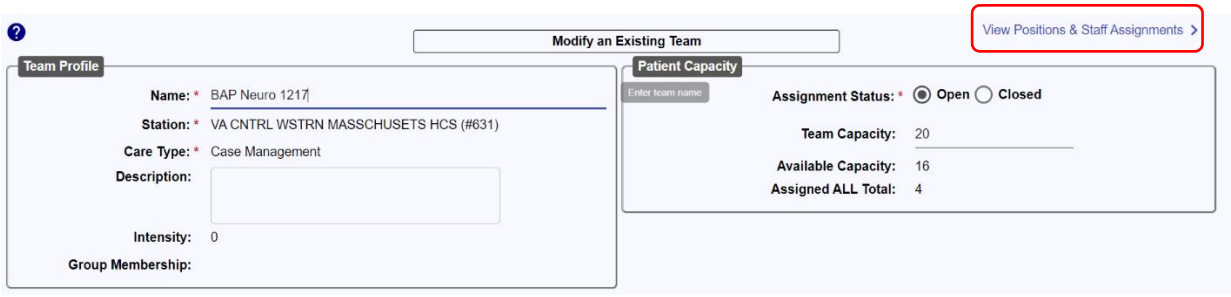
1. From the main menu, click Teams > Search for a Team to display the Search for Team box. Enter the search criteria and click on the **team name** link.

Figure 46 - Search for Team Menu Op on



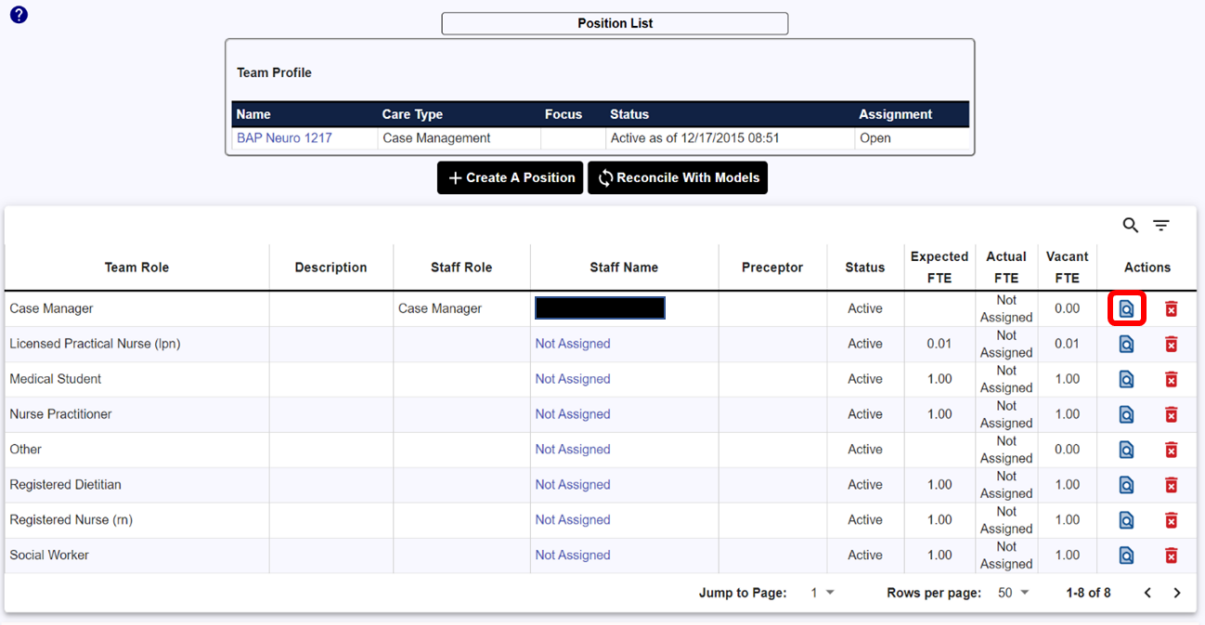
2. From the Modify an Exis ng Team screen, click the **View Posi ons and Staff Assignments** link. The *Posi on List* page will display.

Figure 47 - View Posi ons & Staff Assignments Link Selected to Modify a Team Role



3. From the *Posi on List* page, click the corresponding icon in the **Ac ons** column. The *Modify an Exis ng Team Posi on* screen will display.

Figure 48 - Posi on List Screen with Ac ons Icon Selected to Modify the Team Role

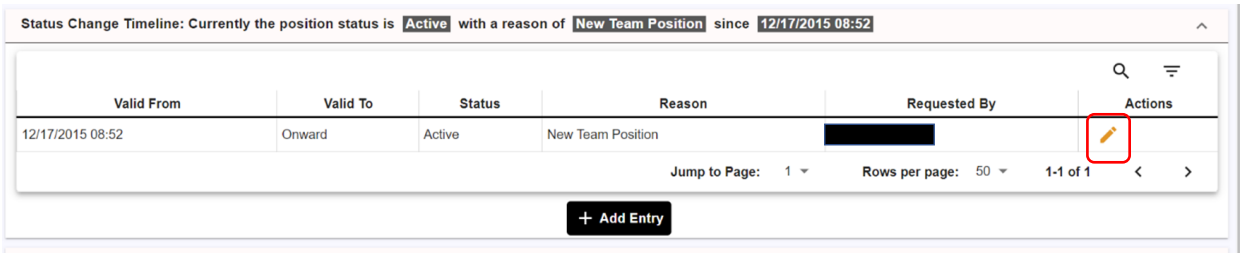


4. In the *Status Change Timeline* sec on at the bo om of the screen, click the **View/Edit Complete Timeline** link to display the history informa on.

8.3 Update an Exis ng Entry

1. A user can change the team role status to **Inac ve** by clicking the (pencil) icon in the Ac ons column. The Update Entry dialog box will display.

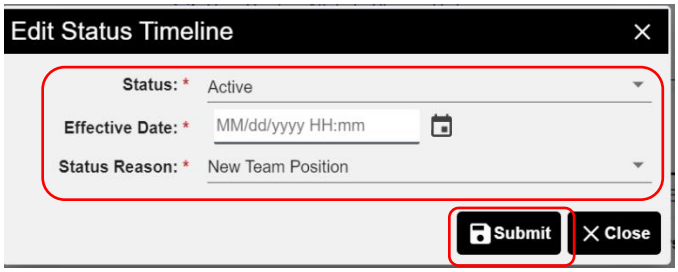
Figure 49 - Upda ng an Exis ng Entry



2. Select a **Status, Effec ve Date** (current date/ me is selected by default, and a user cannot choose a past date), and **Status Reason**.

3. Click **Submit** to con nue**, Cancel** to cancel. A confirma on message will display in the dialog box and click **Close** to con nue. The updated entry will display.

Figure 50 - Update Entry Box When Modifying a Team Role

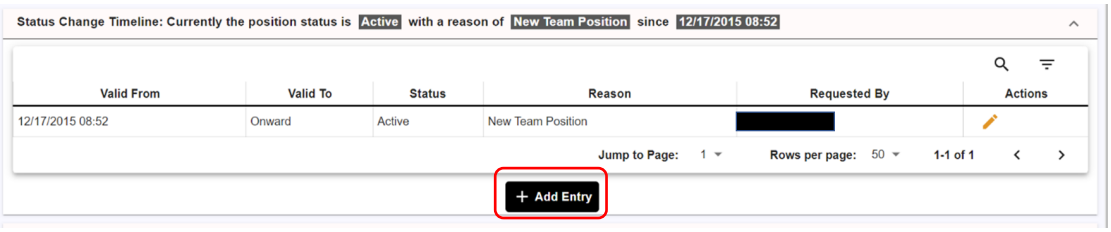


4. Click the **Close Timeline** link to close this sec on.

8.4 Add an Entry

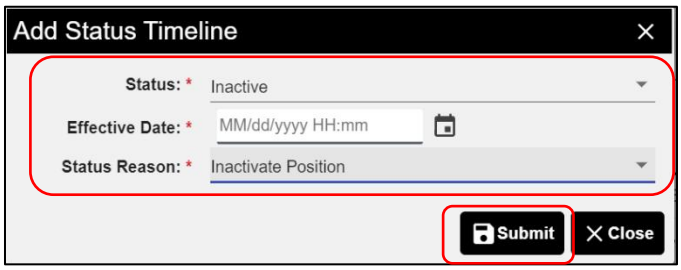
1. A user can add an entry to the meline by clicking the **Add Entry** bu on. The *Add Entry* dialog box will display.

Figure 51 - Add an Entry Bu on Selected



2. Select a **Status, Effec ve Date** (current date/ me is selected by default, and a user cannot choose a past date), and **Status Reason**.
3. Click **Submit** to con nue, **Cancel** to cancel. A confirma on message will display in the dialog box and click **Close** to con nue. The new entry will display in the list.

Figure 52 - Add Entry Box

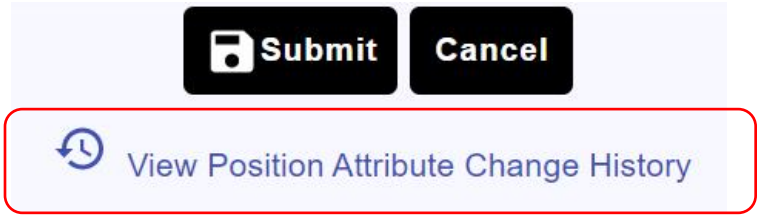


9 View Team Role A ribute Change History

A user can view the adjusted capacity change history and the jus fica on for capacity adjustment change history from the *History of Posi on A ribute Changes* screen.

1. From the *Modify an Exis ng Posi on* screen, click the **View Posi on A ribute Change History** link below the **Submit** bu on. The *History of Posi on A ribute Changes* screen will display.

Figure 53 – View Posi on A ribute Change History Link Selected

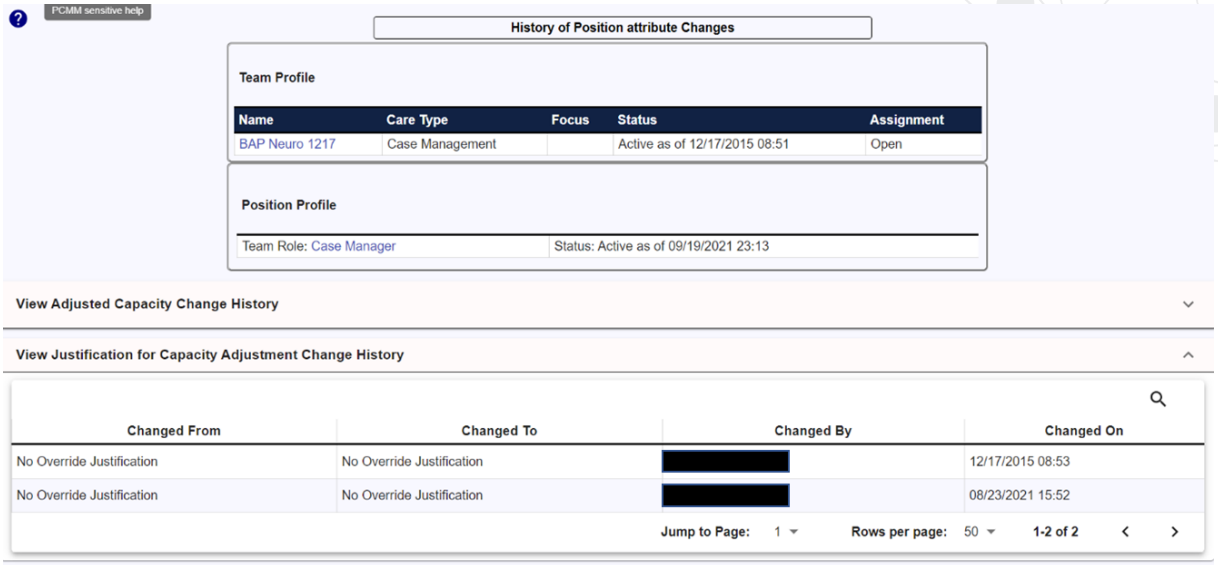


2. Open the **Adjusted Capacity Change History** sec on to view the adjusted capacity change history of the team. This is displayed in a table format with the following columns: *Changed From, Changed To, Changed By,* and *Changed On* date columns. A user can click the email icon (envelope) in the *Changed By* column to email the staff member.

Figure 54 – Adjusted Capacity Change History Sec on Expanded

3. Open the **Jus fica on for Capacity Adjustment Change History** sec on to view the jus fica on for the capacity adjustment change history. This is displayed in a table format with the following columns: *Changed From, Changed To, Changed By,* and *Changed On* date columns. A user can click the email icon (envelope) in the *Changed By* column to email the staff member.

Figure 55 - View Jus fica on for Capacity Adjustment Change History Sec on Expanded



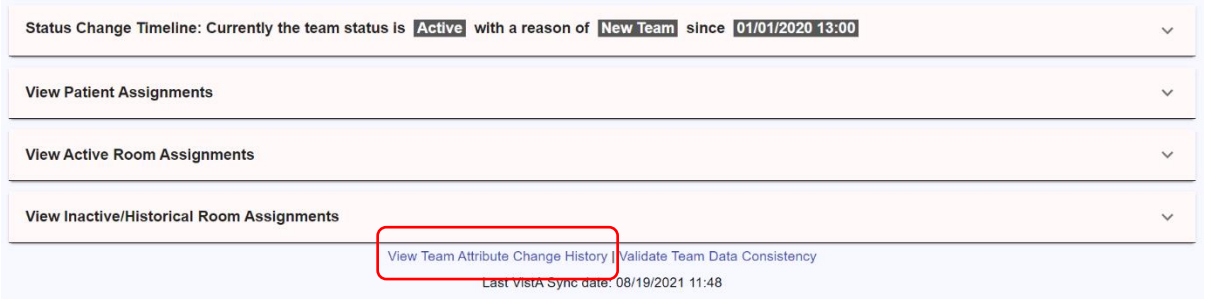
9.1 View Team A ributes Change History

A user can view several team change history sta s cs using the View Team A ributes

9.2 Change History link.

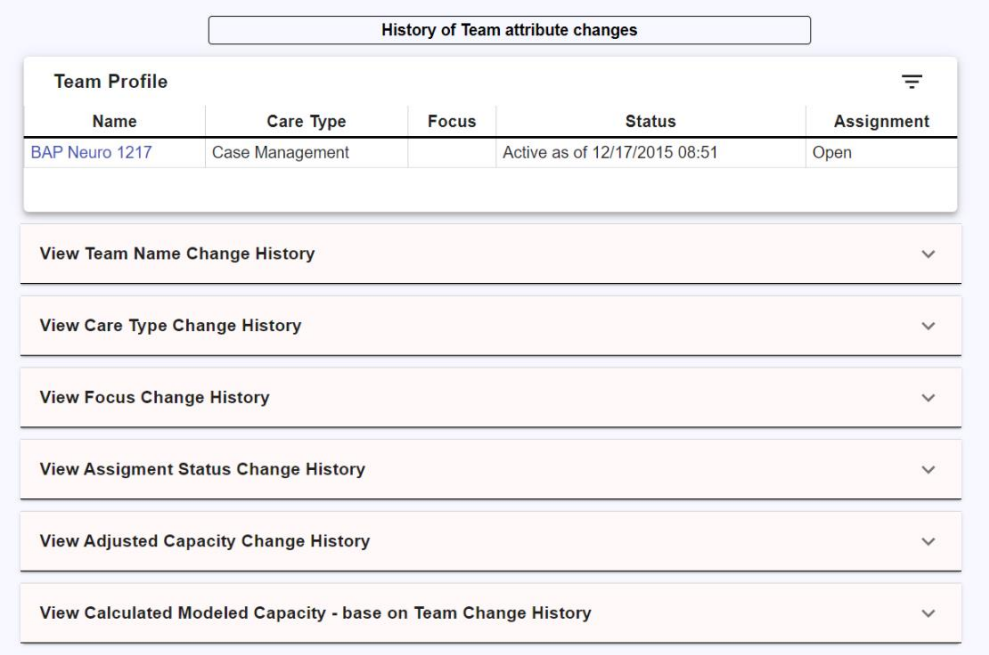
1. From the *Modify an Exis ng Team* screen, click the **View Team A ribute Change History** link near the bo om of the screen.

Figure 56 - View Team A ribute Change History Link Selected



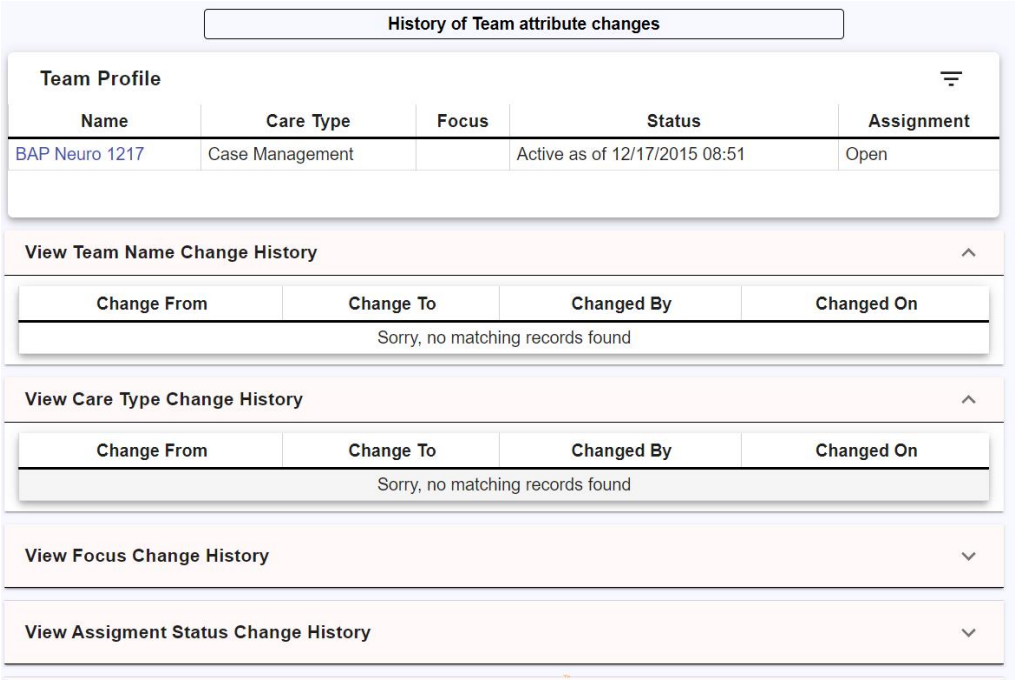
2. The *History of Team A ribute Changes* screen displays with the following sec ons:
   - View Team Name Change History
   - View Care Type Change History
   - View Focus Change History
   - View Assignment Status Change History
   - View Adjusted Capacity Change History
   - View Calculated Model Capacity -- based on the Team Change History'

Figure 57 - History of Team A ribute Change Full Screen



3. Each of these sec ons contains the associated data for that sec on in a standard table format with the following columns: *Changed From, Changed To, Changed By,* and *Changed On* date columns. A user can click the e-mail icon (envelope) to e-mail the *Changed By* staff member if they have an e-mail address associated with their record.
4. Open each sec on to view the data associated with that sec on.

Figure 58 - View Team Name Change & View Care Type History Sec ons Expanded

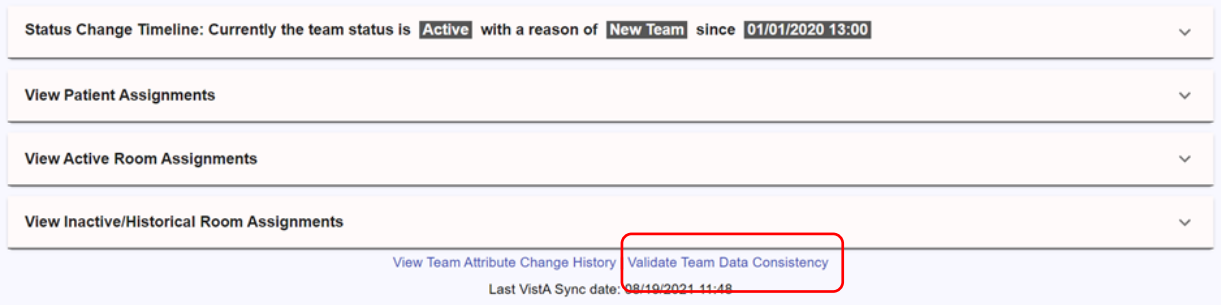


10 Validate Team Data Consistency

A user can check for data consistency errors using the Validate Team Data Consistency func onality.

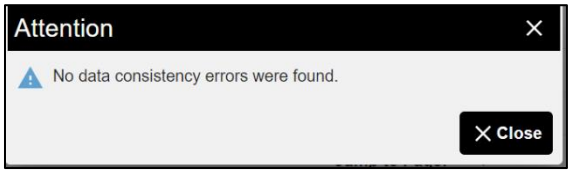
1. From the **Modify an Exis ng Team** screen, click the **Validate Team Data Consistency** link located at the bo om of the page.

Figure 59 - Validate Team Data Consistency Link Selected



2. A message box will display, indica ng if there are any data consistency errors or if none are found. Correct any data consistency error. Click **Close**.

Figure 60 - No Data Consistency Errors Were Found Message



10.1 Search for a Team by Name

A user can search for a team using the following op ons:

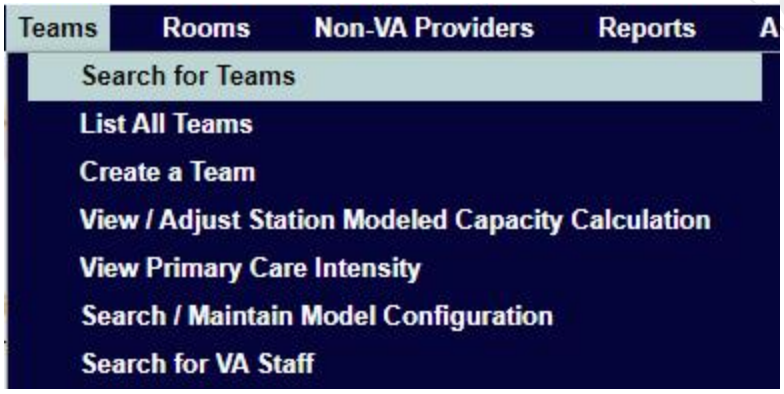
- the Search for Team screen.
- the **Pa ent Assignments** sec on of the *Pa ent Profile* screen.
- the *Team List* screen.

Any of these search methods enable a user to modify or view a team's profile.

10.2 Using the Search for Team screen

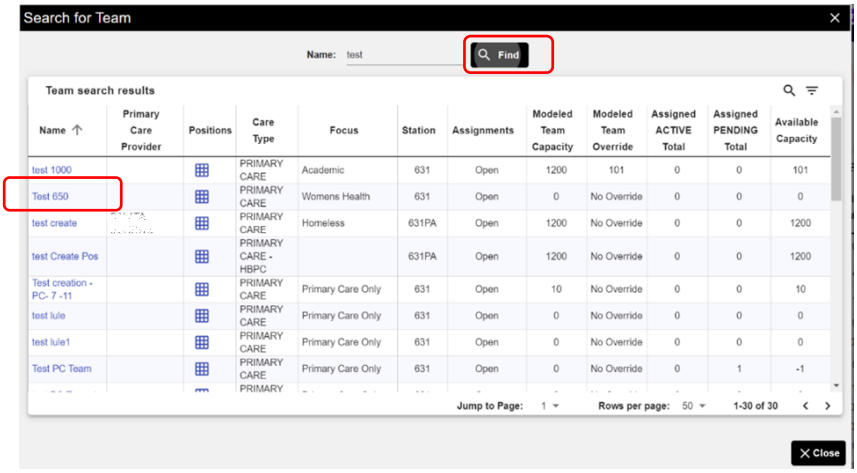
1. From the main menu, select **Teams** > **Search for Team** to display the *Search for Team* screen.

Figure 61 - Search for Team Menu Op on



2. Enter part or all of a team's name in the **Name** field and click **Search** to display the teams that match the search criteria. Alternatively, click the **Search** button to view a list of all teams.
3. Click the **team name** link in the **Name** column to display the *Modify an Existing Team* page.

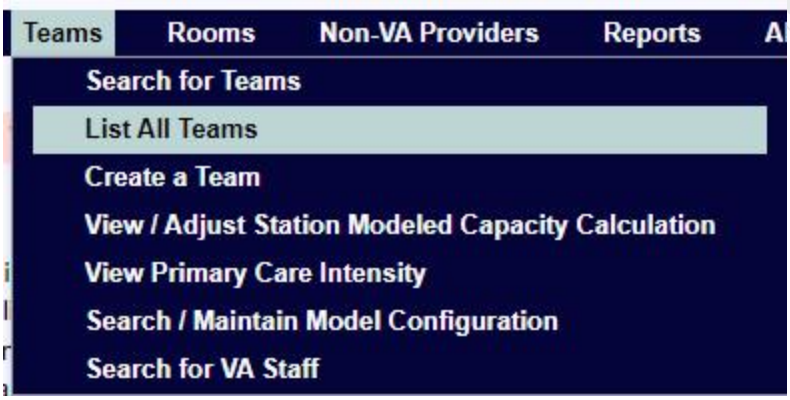
Figure 62 - Search for A Team Box with a Team Selected



10.3 Using the Team List screen

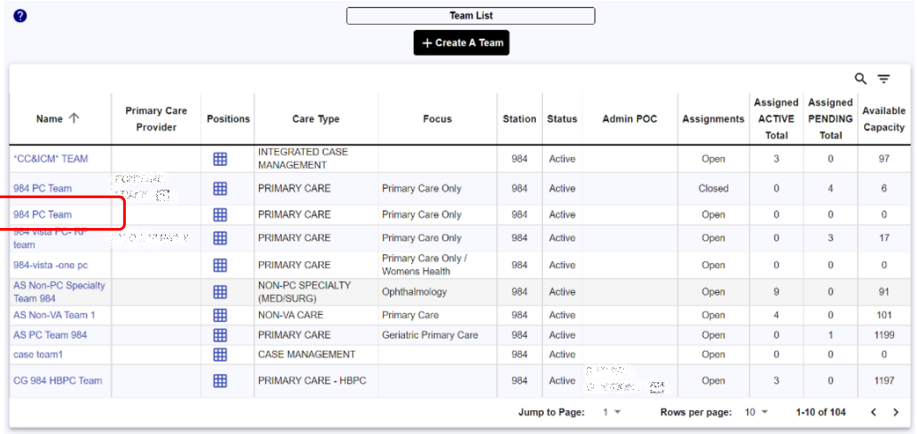
1. From the main menu, select **Teams** > **List All Teams** to display the *Team List* screen.

Figure 63 - List All Teams Menu Option



2. Scroll down, or use the naviga on bu ons at the bo om of the page to locate the team's name in the list.
3. Click on the **team name** link in the **Name** column to display the *Modify an Exis ng Team* page.

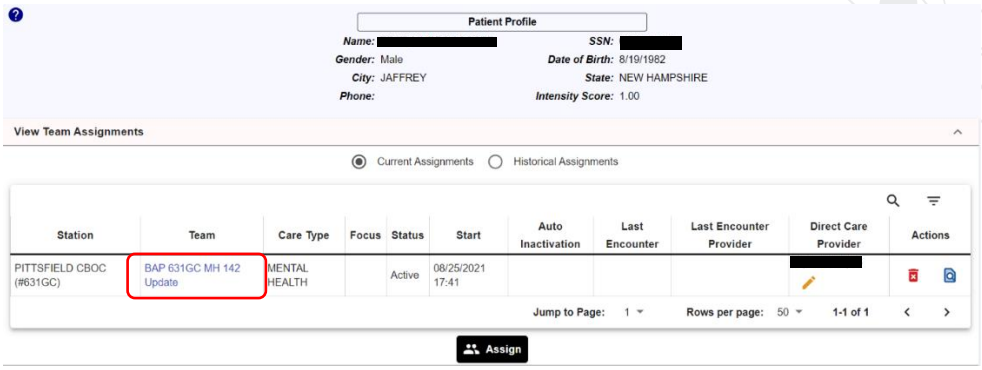
Figure 64 - Team List with Team Name Selected



10.4 Using the Pa ent Profile screen

1. From the *Pa ent Profile* page, click the **View Team Assignments** toggle link to display a sec on that indicates what team(s) the pa ent is (has been) assigned to.
2. Click on the **team name** link in the **Team** column to display the *Modify an Exis ng Team* page.

Figure 65 - Pa ent Profile with Team Name Selected



11 Assign a Surrogate

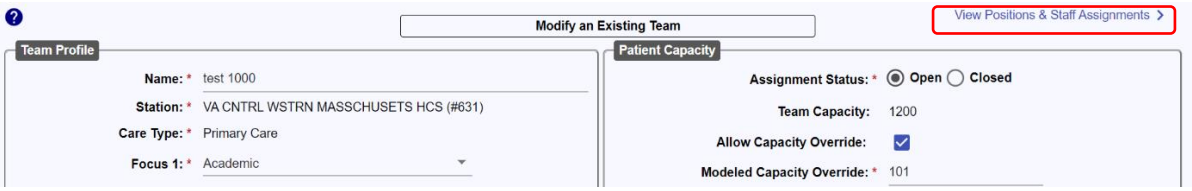
A PCMM teamlet surrogate is a specific individual in a similar role that is assigned to cover for the corresponding PACT staff-member during short-term or unplanned absences. When a new team is created using the team type of Primary Care, the surrogate team roles of Surrogate Primary Care Provider, Surrogate Care Manager, Surrogate Clinical Associate, and Surrogate Administra ve Associate will auto-populate.

A user can assign someone to receive their PCMM Web no fica ons from the no fica on distribu on list while they are away. A surrogate receives no fica ons for a specified team role and can act upon the no fica ons.

11.1 From the Posi on List screen

1. From the *Modify an Exis ng Team* screen, click the **View Posi ons & Staff Assignments** link. The *Posi on List* screen will display.

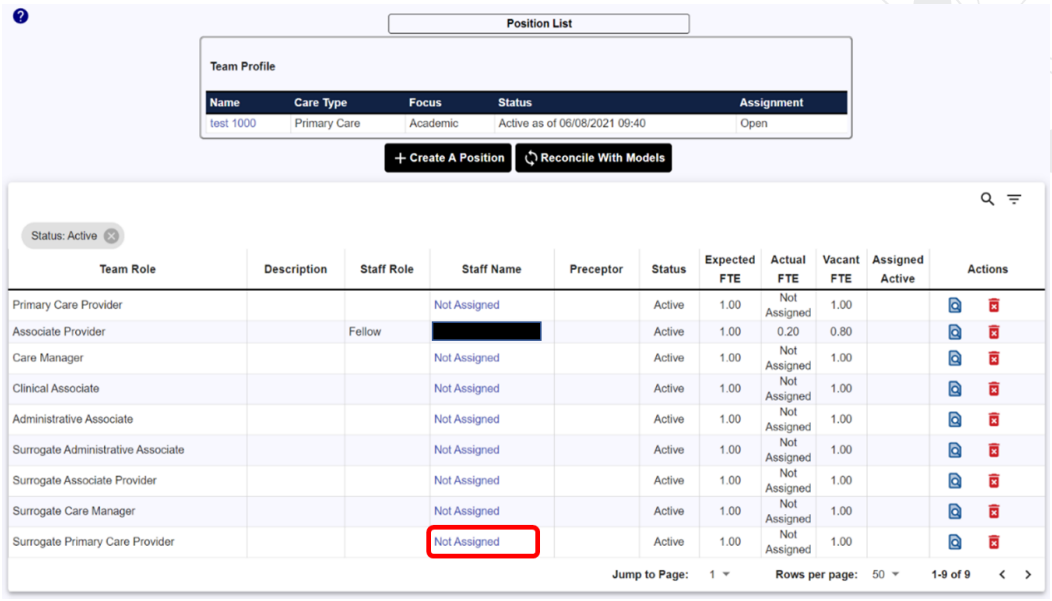
Figure 66 - View Posi ons & Staff Link Selected to Assign a Surrogate



2. Locate the **Surrogate Team** Role type to assign a staff member to and click the **Not Assigned** link to display the *Search for Staff* screen.

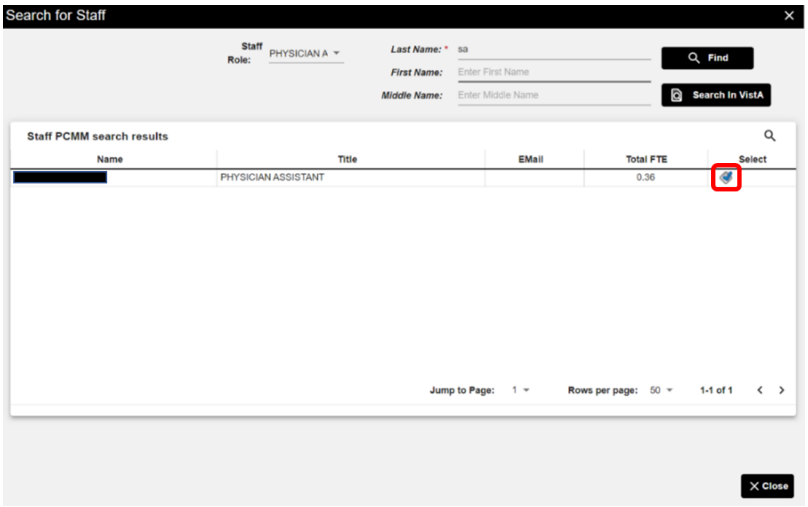
   - **Note**: For Primary Care Type teams, a user can assign a Surrogate Administra ve Associate, Associate Provider, Care Manager, Clinical Associate, or Primary Care Provider.

Figure 67 - Assign a Surrogate on the Posi on List Screen



3. Enter at least two characters of a last name for the staff member. Entering first or middle names will narrow the search. Select a **Staff Role** from the drop-down list.
   - A terminated staff member is shown as "Separated" in the search results.
   - Total FTE column includes the sum of team assignments associated with the staff member.
4. Click **Search** to display a list of staff names results. Click **Cancel** to cancel the search.
5. Click the icon in the **Select** column to view the staff member's profile. The *Staff Profile* screen will display.

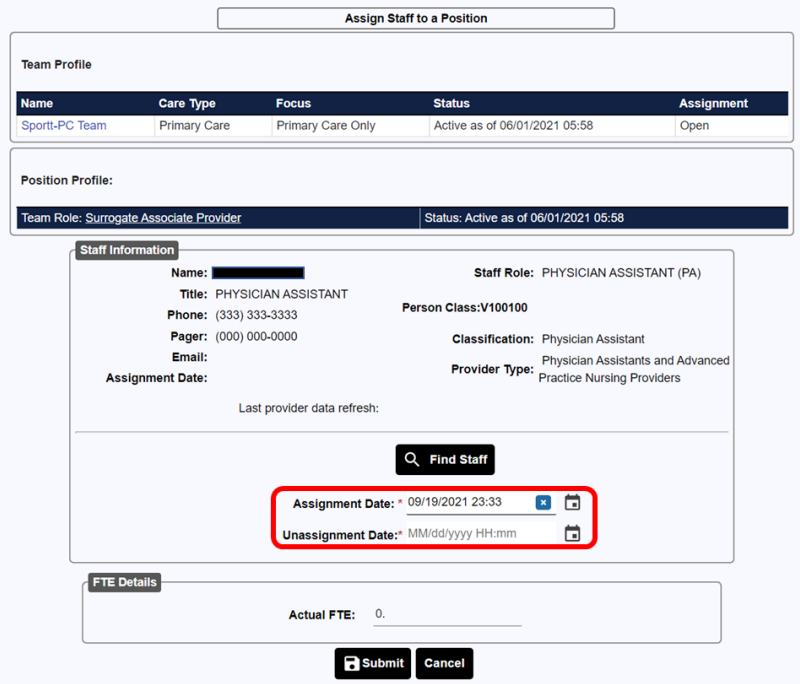
Figure 68 - Search for Staff to Assign a Surrogate



- Op onal: Click the calendar icon next to **Unassignment Date** field to change the unassignment date (current date and me is displayed by default). Choose an **Unassignment Reason** from the drop-down list.

6. Enter a number in the **FTE** field.
7. Click the **Submit** to assign the staff member as a Surrogate.

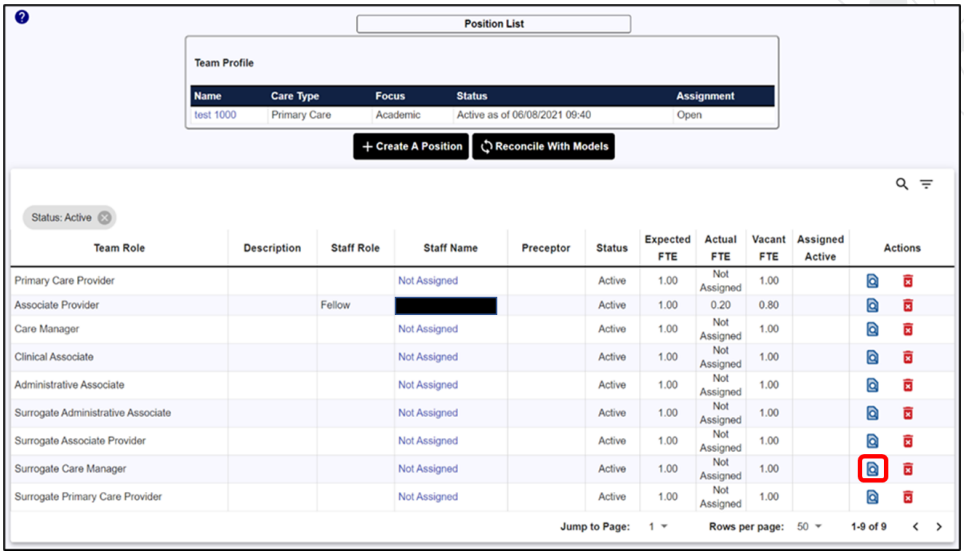
Figure 69 - Assigning a Surrogate on the Staff Informa on Screen



11.2 From the Modify an Exis ng Posi on screen

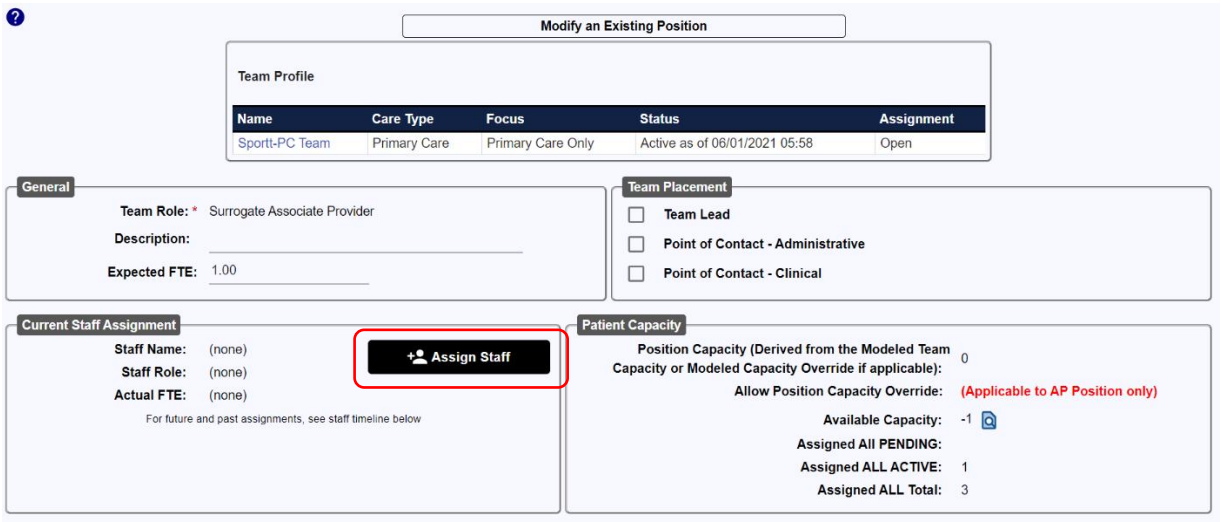
1. From the *Modify an Exis ng Team* page, click **View Posi ons and Staff Assignments**. The *Posi on List* page displays. Click icon in the **Ac ons** column that corresponds to the surrogate team role to staff.

Figure 70 – Posi on List Screen with the Ac ons Icon Selected to Assign a Surrogate



2. The *Modify an Exis ng Posi on* screen will display. The *Current Staff Assignment* sec on will display *Staff Name, Role,* and *Actual FTE*. Click the **Assign Staff** bu on to assign a staff member to the team role. The *Search for Staff* box displays.

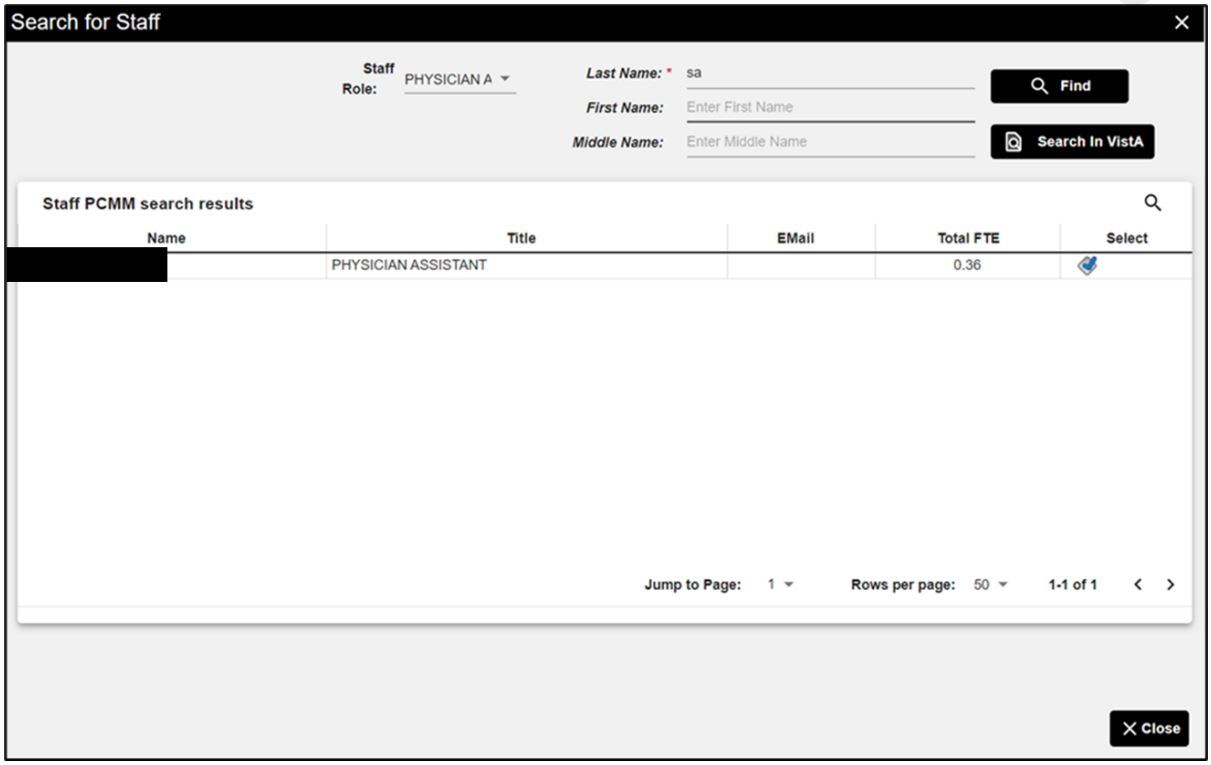
Figure 71 - Modify an Exis ng Posi on with the Assign Staff Bu on Selected



3. Enter at least two characters of a last name for the staff member. Entering first or middle names will narrow the search. Select a **Staff Role** from the drop-down list.
   - A terminated staff member is shown as "Separated" in the search results.
   - Total FTE column includes the sum of team assignments associated with the staff member.
4. Click **Search** to display a list of staff names results. Click **Cancel** to cancel the search.

5. Click the icon in the **Select** column to view the staff member's profile. The *Staff Profile* screen will display.

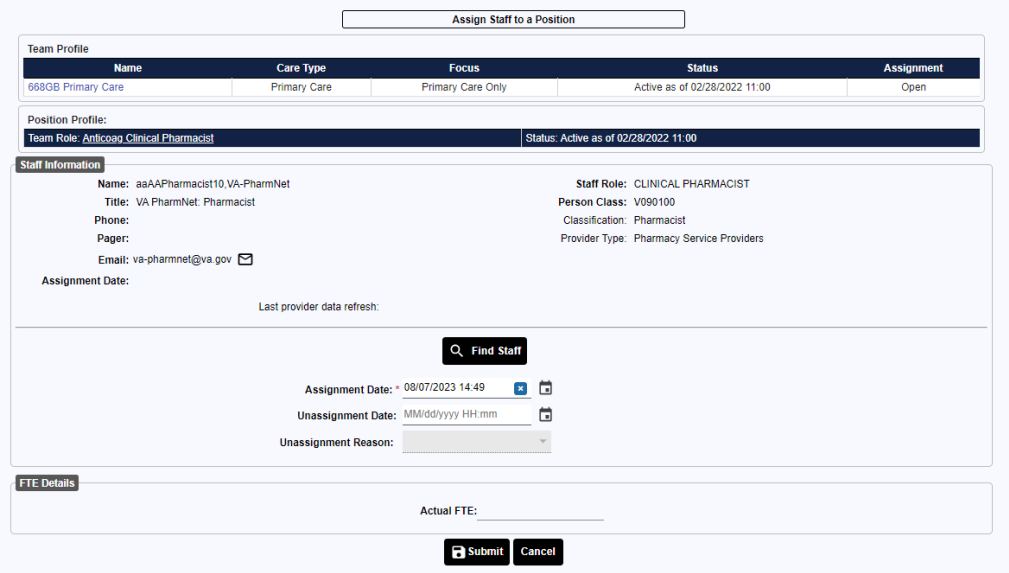
Figure 72 - Search for Staff Screen with Select Icon



- Op onal: Click the calendar icon next to **Unassignment Date** field to change the unassignment date (current date and me is displayed by default). Choose an **Unassignment Reason** from the drop-down list.

6. If required, enter a number in the **FTE** field.
7. Click the **Submit** to assign the staff member as a Surrogate.

Figure 73 - Surrogate Assigned on Staff Informa on Screen



11.3 Modify or View Surrogate Staff Assignments

A surrogate receives no fica ons for a specified team role during a specified date range and can act upon the no fica ons.

1. From the Posi on List, select the icon in the **Ac ons** column in the same row of the Surrogate assignment to display the *Modify an Exis ng Posi on* screen.

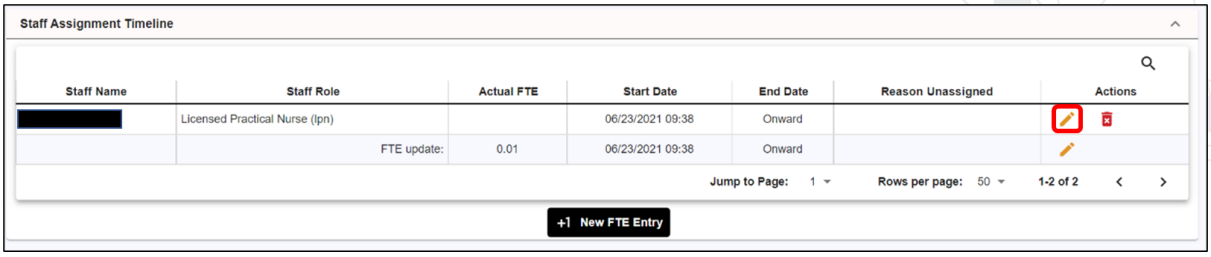
Figure 74 - Modify Surrogate From the Posi on List Screen

Team Role	Description	Staff Role	Staff Name	Preceptor	Status	Expected FTE	Actual FTE	Vacant FTE	Assigned Active	Actions
Primary Care Provider		Physician-attending	[redacted]		Active	1.00	0.01	0.99	1	
Associate Provider			Not Assigned		Active	1.00	Not Assigned	1.00		
Care Manager			Not Assigned		Active	1.00	Not Assigned	1.00		
Clinical Associate			Not Assigned		Active	1.00	Not Assigned	1.00		
Administrative Associate			Not Assigned		Active	1.00	Not Assigned	1.00		
Clinical Nurse Specialist			Not Assigned		Active	1.00	Not Assigned	1.00		
Health Technician			Not Assigned		Active	1.00	Not Assigned	1.00		
Medical Director			Not Assigned		Active	1.00	Not Assigned	1.00		
Other Mh Provider			Not Assigned		Active	1.00	Not Assigned	1.00		
Surrogate Administrative Associate			Not Assigned		Active	1.00	Not Assigned	1.00		
Surrogate Associate Provider			Not Assigned		Active	1.00	Not Assigned	1.00		
Surrogate Clinical Associate		Licensed Practical Nurse (lpn)	[redacted]		Active	1.00	0.01	0.99		

Jump to Page: 1 Rows per page: 50 1-12 of 12

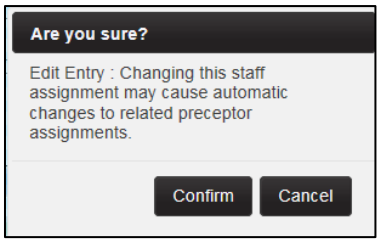
2. In the *Staff Assignments Timeline* sec on, choose a staff member and click the edit (pencil) icon to view the *Modify an Exis ng Posi on page.*

Figure 75 - Modify Surrogate from the Staff Assignment Timeline Sec on



3. A message will display, indica ng modifica ons may affect the preceptor assignments. Click **Confirm** or **Cancel**.

Figure 76 - Edit Entry Message



4. Click the **Search Staff** bu on to assign a new Surrogate to the posi on.
5. Enter a different **Assignment Date** and/or a different **Unassignment Date** using the calendar icons.
6. Click **Submit**, or **Cancel** to cancel any changes.
   - A success message will display, and a user can view the new changes in the *View Staff Assignments* table.
   - A user can also choose to delete the staff member from the list. Click the **Delete** icon. A success message will display, and a user can view the new changes in the *View Surrogate Staff Assignments* table.

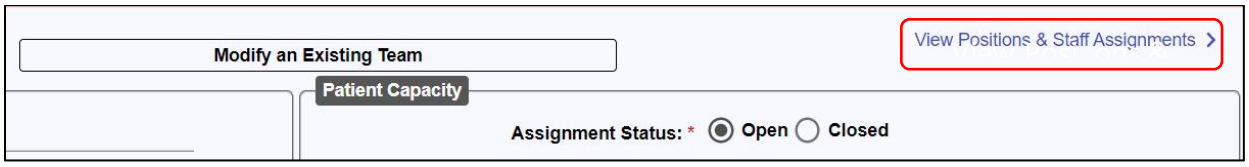
12 Reconcile Team with Models

Exis ng team can be reconciled with available models to create modeled team posi ons.

- **Note:** The team must be ac ve for the system to perform this ac on.

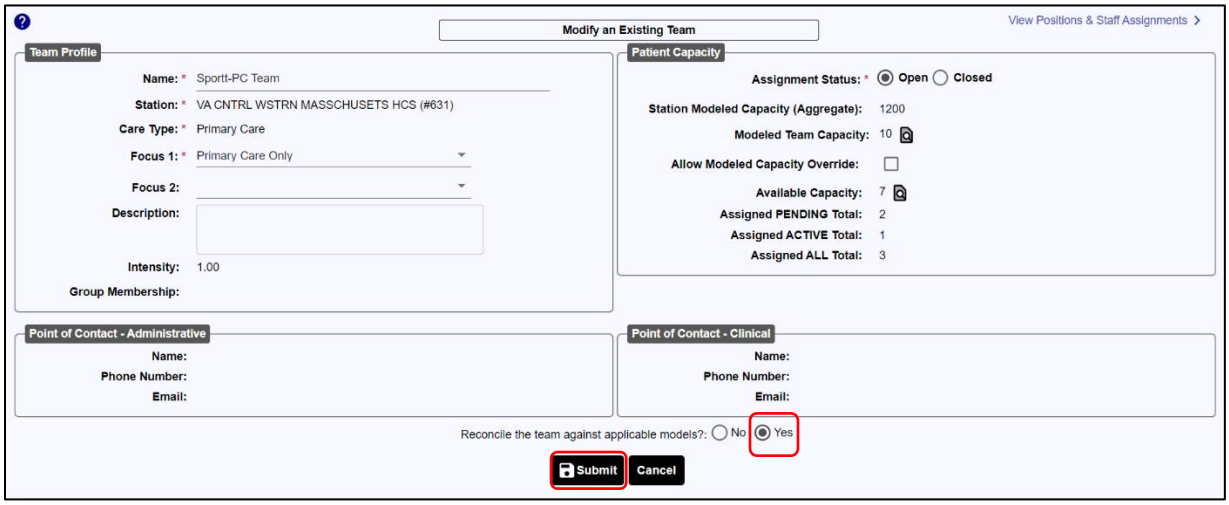
1. Locate the desired team to reconcile. From the *Modify an Exis ng Team* screen, click the **View Posi ons & Staff Assignments** link. *The Posi on List* screen will display.

Figure 77 - View Posi ons & Staff Assignment Link Selected to Reconcile Team with Models



2. Select the **Yes** button for the "Reconcile the team against applicable models" option and then press the submit button. If reconciliation took place, a confirmation message will appear at the top of the screen. A delete icon will appear in the **Actions** column for any team role that does not match the model. A user can view the reconciliation results and the model linked to the team by clicking the links at the bottom of the page.

Figure 78 - Position List Screen with Message Displaying Team was Reconciled Against Models

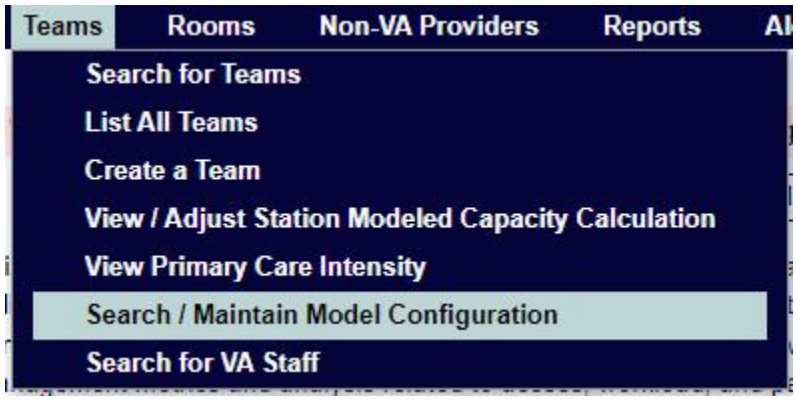


12.1 Maintain a Team Model Configuration

This task is limited to users with specific permissions and allows a user to search for or create a configuration on a team model.

1. Select **Teams** > **Search Model Configuration** from the main menu to display the *Search for/Create Model Configuration* screen.

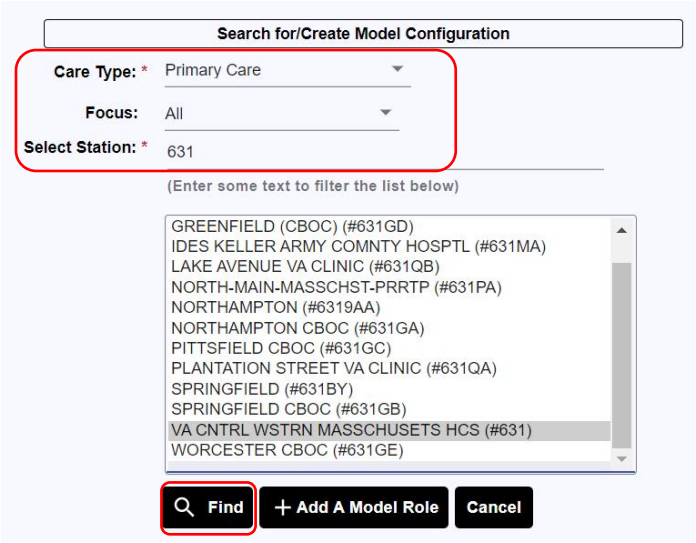
Figure 79 - Search Model Configuration Menu Option



2. Select the care type from the **Care Type** drop-down list.
3. If needed, select a focus from the **Focus** drop-down list.

4. Enter the name of a sta on in the **Sta on** text box or select a sta on name from the list.
5. Click **Find** to display a list of model configura ons at the bo om of the screen. If no configura ons are found, a message will display.

Figure 80 - Search for Create Model Configura on Screen



- When a team profile is submi ed and saved for the first me, the system will automa cally create the team roles defined in the Model Team Configura on. The Model Team Configura on is established at the Na onal level and can be overridden if needed at the sta on level. It represents the required team roles as well as any op onal roles that normally exist for the team based on Care Type and Focus (op onally).
- The system first will check for the existence of a Model Team Configura on for the Team Care Type and the Team Focus for the sta on number a user is logged into. If a Model Team Configura on does not exist for the Team Care Type and the Team Focus for a sta on, the Na onal Model Team Configura on will be used.
- If there is a Model Team Configura on for Team Care Type and not the Team Focus, the Model Team Configura on for the Team Care Type for the sta on will be used. If there is not a Model Team Configura on for the Team Care Type, the Na onal Team Configura on Model will be used.
- If there is not a Model Team Configura on in existence at the Na onal level for a Team Care Type, there will not be any team roles automa cally created.
- If a Model Team Configura on has been applied to the team, the results of the Team Posi on crea on will be displayed.

6. An alert will be generated and sent to each recipient when a Team is created no fying the user that the Model Team Configura on for a team was created/updated in the Alert Rules for addi onal informa on on alert types and who they are sent to.

7. A user will have the ability to navigate to the current Model Team Configura on applicable to the team.

    - **Note:** Any team roles created by the System will appear in the Team Configura on List along with any team roles created by a PCMM Web user.

12.2 Create a Role for a Team Model Configura on

A user can create a new model role for a model team:

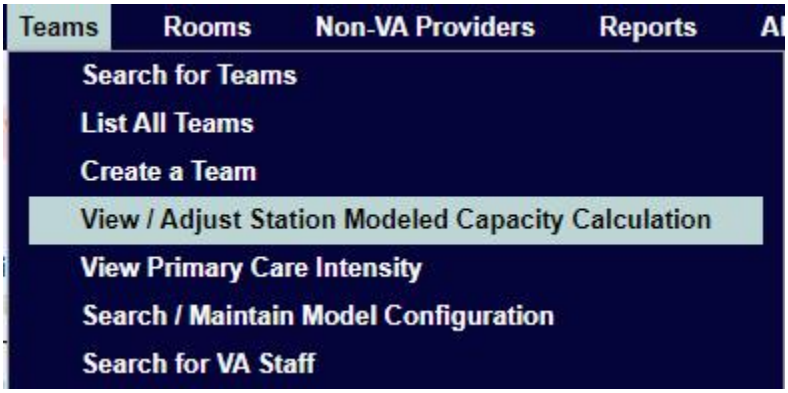
1. Select **Teams** > **Search Model Configura on** from the main menu to display the *Search for/Create Model Configura on* screen.
2. Select the **Care Type, Focus,** and **Sta on**. Select a Role from the **Role** drop-down list.
3. Check the **Required** check box if the role is to be required for the team.
4. Click the **Yes** bu on to no fy the PCMM Coordinators of the change. **No** is selected by default.
5. Click **Submit** to con nue, **Cancel** to cancel. A confirma on message will display.

12.3 Calculate Sta on Modeled Capacity – Selec on of Care Type

1. Select **Teams** > **View/Adjust Sta on Modeled Capacity Calcula on** from the main menu to display the *Model Panel Size Calculator – Selec on of Care Type* screen.

    - **Note:** This ac on and menu op on is limited to specific users.

Figure 81 - View/Adjust Sta on Modeled Capacity Calcula on Menu Op on

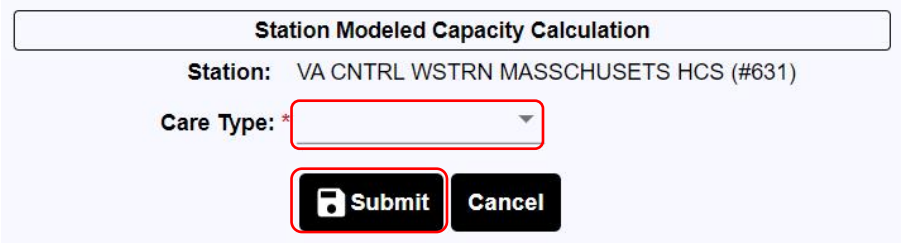


2. Select a care type from the **Care Type** drop-down menu.

    - Select the **Primary Care** type to display the *Calculate Model Panel Size – Primary Care* Worksheet screen.
    - Select any other care type to display the Sta on Modeled Capacity Calcula on – Adjustment of Model Capacity screen.

3. Click **Submit** to con nue, **Cancel** to cancel.

Figure 82 – Sta on Modeled Capacity Calcula on - Selec on of Care Type Screen



12.4 Calculate Model Panel Size - Primary Care Worksheet

A user can calculate the model panel size for a Primary Care team through the *Primary Care Worksheet* screen.

If a user has selected the **Primary Care** type from the View/Adjust Modeled Panel Size Calculator screen, the Calculate Model Panel Size – Primary Care Worksheet screen will display.

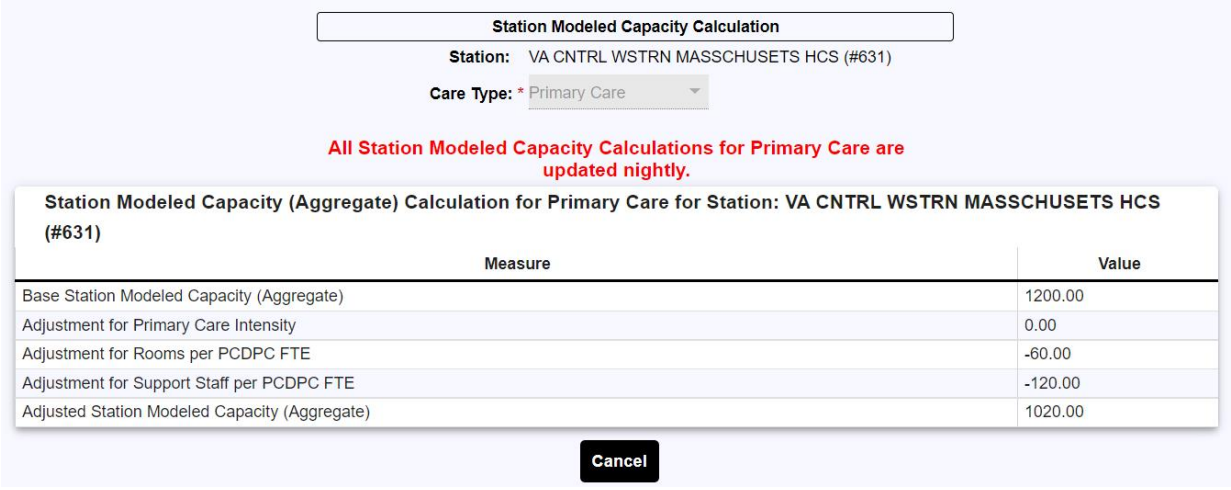
The data is displayed in a table with two columns: *Measure* and *Value*. The last column lists the final *Adjusted Model Panel Size*.

- **Note:** This ac on and menu op on is limited to specific users.

In addi on, a user can view informa on by clicking the toggle control for the tables below:

- View Primary Care Intensity Based Adjustment
- View Support Staff per PC FTE Based Adjustment
- View Rooms per PC FTE Based Adjustment
- View Modeled Panel Size Change History

Figure 83 - Model Panel Size Calcula on - Worksheet for Primary Care Team Screen



12.5 View Primary Care Intensity Based Adjustment

NOTE as of 10/2018: The intensity score value has been changed in the database to reflect a value of 1.0 for all pa ents which has effec vely removed the intensity score from influencing the modeled team capacity calcula on as a factor. This value con nues to display on the pa ent and team profiles but the value should be 1.0 in all places.

Figure 84 - View Intensity on Pa ent Profile

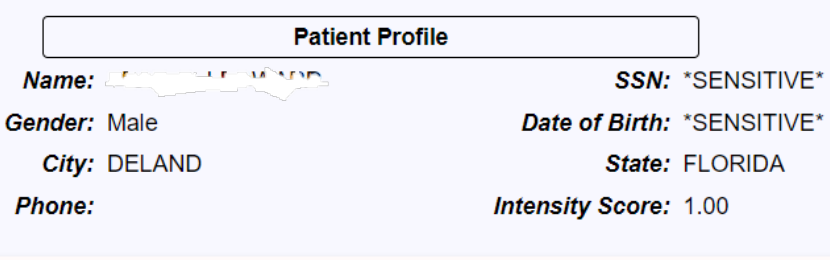


Figure 85 - View Intensity on Team Profile

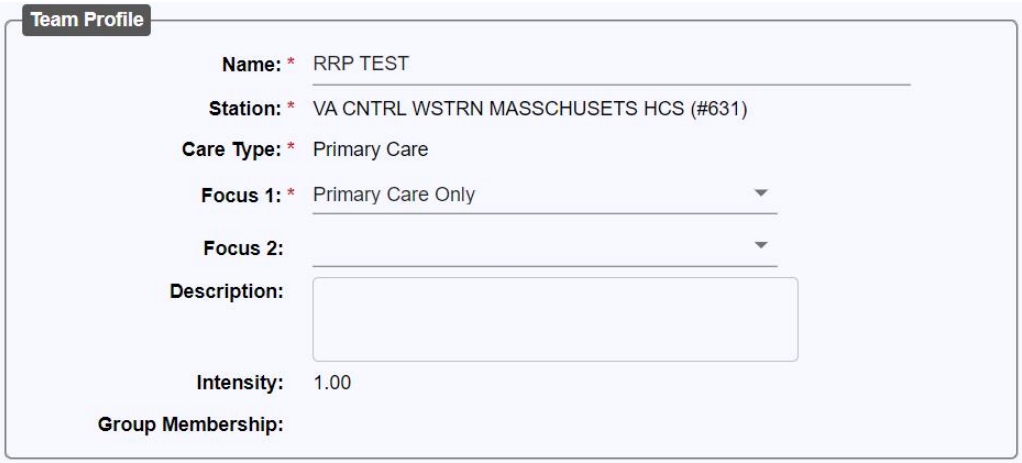
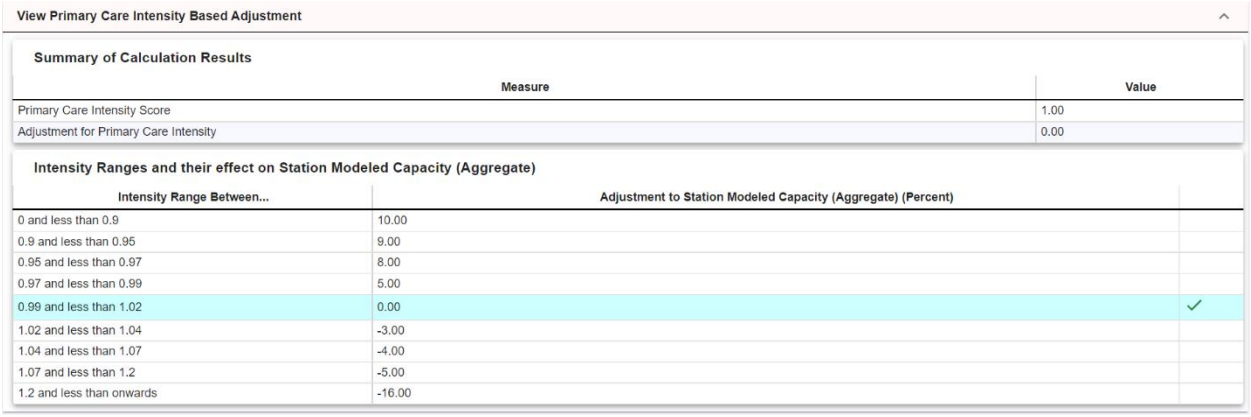


Figure 86 - Summary of Calcula on Results Screen

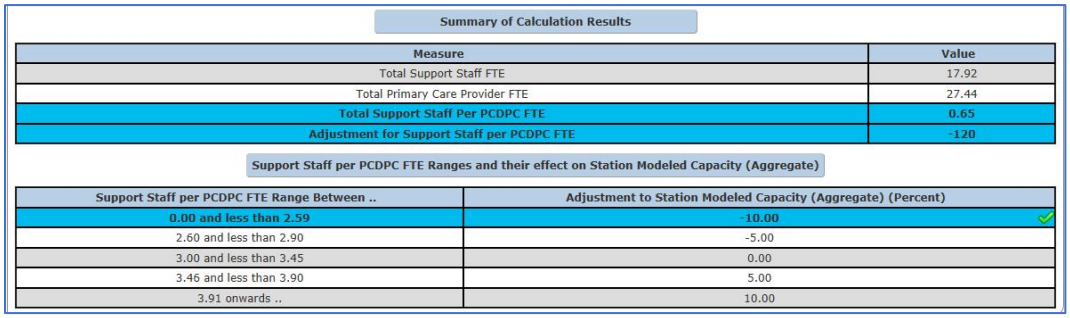


12.6 View Support Staff per PC FTE Based Adjustment

The table in this sec on lists the Ac ve Primary Care teams for the sta on with their PC and Support Staff Team Posi ons. Table data includes *Team name, Support Staff Team Posi ons, Total Team Support Staff FTE, Primary Care Provider Team Posi ons,* and *Total Team Primary Care Provider FTE*.

- Click a **team name** link in the **Team Name** column to open the *Modify an Exis ng Team* screen for that team.
- Click a team role link in the **Support Staff Team Posi ons** column to open the *Modify an Exis ng Posi on* screen for that team role associated with the team.
- Click a Primary Care team role link in the **Primary Care Provider Team Posi ons** column to open the *Modify an Exis ng Posi on* screen for that Primary Care team role associated with the team.

Figure 87 - Ac on Primary Care Teams Screen



Summary of Calculation Results

Measure	Value
Total Support Staff FTE	17.92
Total Primary Care Provider FTE	27.44
Total Support Staff Per PCDPC FTE	0.65
Adjustment for Support Staff per PCDPC FTE	-120

Support Staff per PCDPC FTE Ranges and their effect on Station Modeled Capacity (Aggregate)

Support Staff per PCDPC FTE Range Between ..	Adjustment to Station Modeled Capacity (Aggregate) (Percent)
0.00 and less than 2.59	-10.00
2.60 and less than 2.90	-5.00
3.00 and less than 3.45	0.00
3.46 and less than 3.90	5.00
3.91 onwards ..	10.00

At the bo om of the table are displayed the Summary of Calcula on Results, the associated table with measure and value columns, and the Support Staff per PC FTE Ranges and their effect on Model Panel Size.

12.7 View Rooms per PC FTE Based Adjustment

The table in this sec on displays the Ac ve Primary Care Teams with Room Assignments data with the following columns: *Team Name, Examina on Room Assignments, Interview Room Assignments,* and *Total Room Assignments* for the team.

- Click a **team name** link in the **Team Name** column to open the *Modify an Exis ng Team* screen for that team.
- Click on an **Examina on Room Assignments** link, if available, to go to the *Modify an Exis ng Room* screen.
- At the bo om of the list is displayed the Ins tu on Totals (FTE)

At the bo om of the table are displayed the *Summary of Calcula on Results*, the associated table with *measure* and *value* columns, the *Total Rooms per PC Provider FTE*, and the

Adjustment. The last table displays the *Rooms per PC FTE Ranges and their effect on Model Panel Size*: the columns displayed are *Rooms per PC FTE Range Between...* and *Adjustment to Modeled Panel Size in Percent*.

Figure 88 - Ac on Primary Care Teams with Room Assignments

Summary of Calculation Results

Measure	Value
Total Examination Pro Rated Rooms - Assigned to Primary Care Teams	8.27
Total Pro Rated Rooms - Assigned to Primary Care Teams	8.27
Total PCDPC FTE	27.44
Total Rooms Per PCDPC FTE	**0.30**
Adjustment for Rooms per PCDPC FTE	**-60**

Rooms per PCDPC FTE Ranges and their effect on Station Modeled Capacity (Aggregate)

Rooms per PCDPC FTE Range Between ..	Adjustment to Station Modeled Capacity (Aggregate) (Percent)
0.00 and less than 2.00	**-5.00**
2.00 and less than 2.50	0.00
2.50 onwards ..	5.00

12.8 View Modeled Panel Size Change History

The compila on table in this sec on displays the following columns: Model Size, Start Date, End Date, Primary Care Intensity, Intensity Based Adjustment, Total Support Staff FTE, Total PC FTE, Support Staff per PC FTE, Support Staff Based Adjustment, Total Rooms FTE, Rooms per PC FTE, and the Rooms Based Adjustment.

Figure 89 - View Modeled Panel Size Change History Sec on

View Station Modeled Capacity (Aggregate) Change History

Model Size	Start Date	End Date	Primary Care Intensity	Intensity Based Adjustment	Total Support Staff FTE	Total PCDPC FTE	Support Staff per PCDPC FTE	Support Staff Based Adjustment	Total Rooms FTE	Rooms per PCDPC FTE	Rooms Based Adjustment
1020.00	11/26/2018 17:39	Onwards	1.000000000000000	0.00	0.39	2.84	0.14	-120.00	0.00	0.00	-60.00
960.00	06/28/2018 09:24	11/26/2018 17:39	1.100000000000000	-60.00	0.38	2.83	0.13	-120.00	0.00	0.00	-60.00
960.00	04/08/2017 14:43	06/28/2018 09:24	1.100000000000000	-60.00	0.38	2.45	0.16	-120.00	0.00	0.00	-60.00
1020.00	12/19/2014 09:26	04/08/2017 14:43	1.000000000000000	0.00	0.00	0.00	0.00	-120.00	0.00	0.00	-60.00

12.9 Sta on Modeled Capacity Calcula on

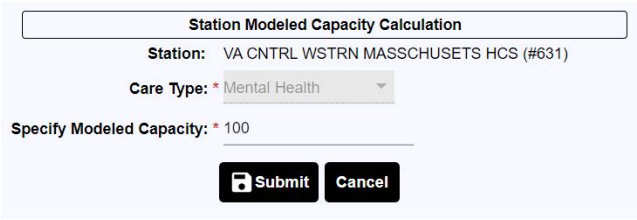
A user can calculate the model panel size for a team other than a Primary Care team through the Model Panel Size Calcula on – Adjustment of Modeled Capacity screen.

If another care type **other** than the *Primary Care* is selected from the *View/Adjust*

Modeled Panel Size Calculator screen, the Model Panel Size Calcula on - Adjustment of Modeled Capacity screen will display.

1. The **Sta on** and **Care Type** is read-only.
2. Enter a number for the **Specify Modeled Capacity** field (the most current number is the default).
3. Click **Submit** to con nue, **Cancel** to cancel. A success message will display.

Figure 90 – Sta on Modeled Capacity Calcula on – Select Care Type Screen



4. A user can view the **Modeled Size Change History** by clicking the toggle control to display the table data. The table contains three columns: Model Size, Start Date and End Date, if available. This is a read-only table.

Figure 91 - View Modeled Size Change History Sec on

12.10 View Primary Care Intensity

A user with the role of Na onal Coordinator can update the primary care intensity score for a sta on. This enables the modeled team capacity calcula ons at a sta on and team level to be adjusted as needed.

1. From the main menu, select **Teams** > **View Primary Care Intensity** from the main menu to display the **View Primary Care Intensity** screen. The sta on a user is currently signed into appears in the Sta on field and is read-only.
2. This intensity value is set as 1.0 throughout the applica on for all pa ents and it does not influence the modeled team capacity calcula ons.
3. Click **Cancel** to return to the PCMM Web home page.

Figure 92 - View Primary Care Intensity

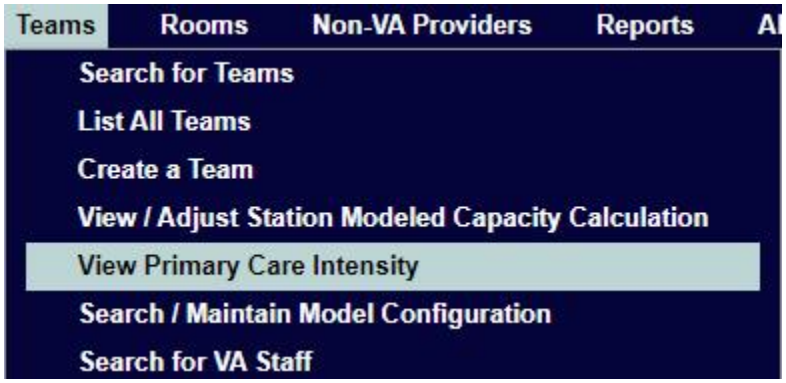
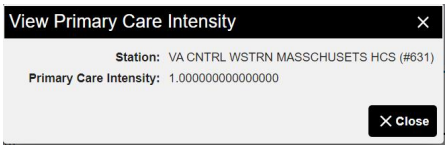


Figure 93 - View Primary Care Intensity Value



13 Pa ent Management

13.1 Assign a Pa ent to a Team

A pa ent can be assigned to a team from the *Pa ent Profile* screen.

3. From the **Pa ent** drop-down menu, select **Search for Pa ent** to display the *Search for Pa ent* screen.

Figure 94 - Search for Pa ent Menu Op on

4. Enter the following search criteria:
   - Enter the first ini al of the last name, plus the last 4 digits of a social security number.
   - Enter the Social Security number (complete in xxx-xx-xxxx format) in the **SSN** text box.
   - Enter the pa ent's last name in the **Last Name** text box.
   - Enter the pa ent's first name in the **First Name** text box.
   - Click **Find** to display the pa ent informa on or a list of pa ents in the lower part of the screen that match the search criteria.
   - **Note:** A user must enter at least the first ini al or last 4 digits of SSN, last name, first name OR full SSN to execute a Pa ent Search.

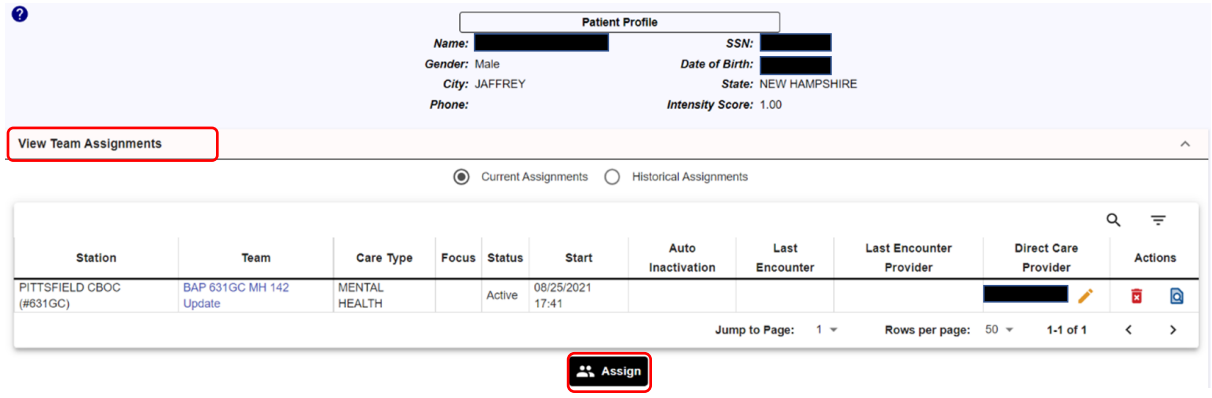
Figure 95 - Assigning a Pa ent to a Team

   - If pa ent record is labeled as Sensi ve Pa ent, the SSN and DOB are masked.
   - If the system returns more than the maximum number of records allowed, the complete list of records will not display. A user can filter the search criteria further (described below), or search for the pa ent in VistA/Cerner.

- **Note:** View the **Search for a Pa ent** sec on for further details on how to search for a pa ent.

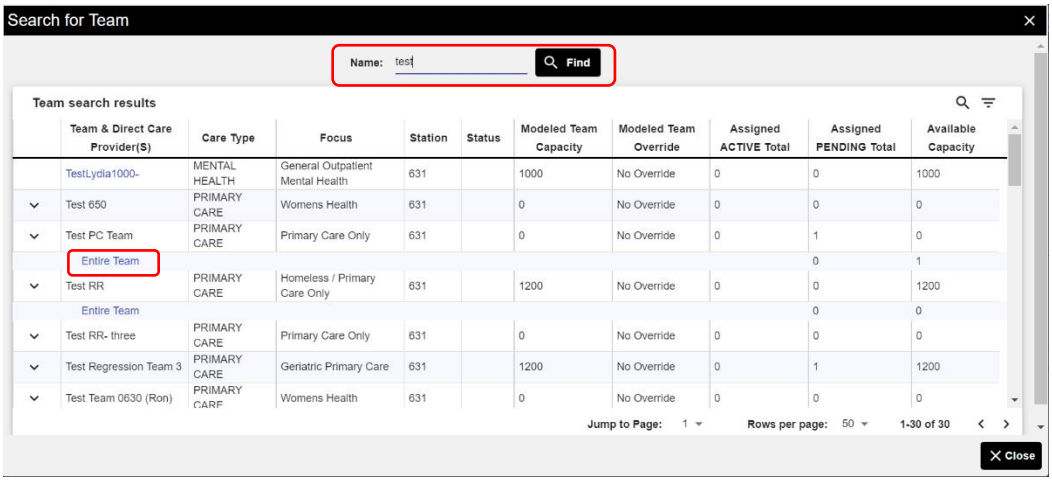
5. Select the **pa ent name link** to display the *Pa ent Profile* screen.
6. In the **View Team Assignments** sec on on the *Pa ent Profile*, click the **Assign** bu on to display the *Search for Team* box.

Figure 96 - View Team Assignments Sec on



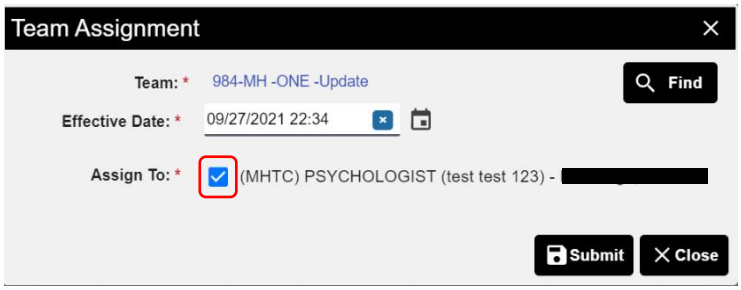
7. Enter a team name in the **Name** field or click the **Search** bu on, to search for a team. Select the **En re Team** link to assign the pa ent to the team. For Primary Care, you can select the **available posi on link** (e.g., Associate Provider).

Figure 97 - Assigning a Pa ent to a Team From the Search for Team Box



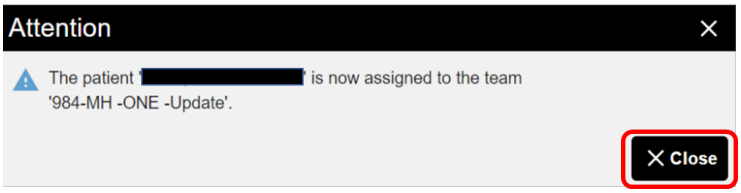
8. If assigning to a Primary Care Team Care Type, a confirma on message displays to indicate the pa ent is successfully assigned to a team. For other Primary Care types (e.g., Mental Health, Community Care), the *Team Assignment* displays with addi onal steps.
9. Accept the default current date or enter a date for the **Effec ve Date** field. The effec ve date must be greater than the team's *Ac ve Date* and cannot be a future date.
10. In the **Assign to** sec on, select the check box beside the appropriate staff member to assign the staff member to the pa ent. The Mental Health Care Type is used as an example.

Figure 98 - Team Assignment Box



11. Click **Submit** to assign the pa ent to the team. A confirma on message will appear if the assignment was successful. Click **OK** to con nue.

Figure 99 - A en on Message A er a Pa ent is Assigned to a Team



- Pa ent assignments to Primary Care teams will have an ini al status of "Pending" un l a qualifying encounter is found with a core qualifying member that was assigned to the team at the me of the encounter and the associated Mul -PACT request (if created) is approved.
- The effec ve date of the Pending assignment will default to the current date and me the assignment is entered, or if a qualifying encounter is found it can be backdated. A er the pa ent is assigned to the PACT team and the system iden fies a qualifying encounter, the status will update from Pending to Ac ve.
- For all care types other than Primary Care, the ini al status will be Ac ve and the Effec ve Date will be the date entered during the assignment.
- A pa ent with a Date of Death (DOD) is not allowed to be assigned to a team.
- An assignment status will be Pending when ini ally assigned to a PACT if either a valid encounter was not found at the me of PACT assignment and will remain un l a completed qualifying encounter is found and the associated Mul -PACT request (if created) is approved. Then, the assignment status converts to Ac ve.
- The pa ent's PACT assignments will be evaluated enterprise wide to determine if an ac ve PACT assignment exists in another 3-digit code sta on.
- A pa ent can be assigned to more than one non-primary care team.
- The assignment will occur at the *Team* level, except in the case of a team with a Purpose of *Primary Care*. All ac ve roles on the team will inherit the team assignment regardless of whether it is staffed or not. PCPs and/or Associate Providers on the team will be shown and a user will be able to select current and ac ve PCP or Associate Provider for pa ent assignment.

- All ac ve roles on the PACT team will inherit the team assignment regardless of whether it is staffed or not.
    - Associate Providers may be added to the PACT and a user will be able to assign specific pa ents to each AP role.
- NON-PC teams only - The Assignment Effec ve Date is defaulted to the current date and will allow a user to override it, but not prior to the team's crea on date or last team discharge date, whichever is latest.
- If the team is closed, assignment is not allowed. Teams Closed for Assignment will not appear in the Team Search results list.
- If the team has reached its allowed pa ent capacity, a warning message states that the allowed pa ent capacity has been reached; however, and the assignment can con nue.
- If the team has reached its overridden maximum pa ent capacity, a warning message will be displayed to indicate the maximum allowed pa ent capacity has been reached and the assignment can con nue.

13.1.1Assigning Pa ents to a Primary HBPC Team

- HBPC does not have pending status. HBPC assignments immediately change to a ACTIVE status when assigned to a pa ent.
- If the pa ent has a HBPC team assignment and the user tries to assign a PACT team, the HBPC assignment is inac vated and the PACT assignment goes to PENDING unless a valid qualifying encounter is found and the associated Mul -PACT request (if created) is approved which will disposi on the PACT assignment to ACTIVE.
- If the pa ent has a PENDING or ACTIVE PACT assignment and the user tries to assign a HBPC team, the PACT assignment will be disposi oned to either INACTIVE or CANCELED and the HBPC assignment goes to ACTIVE.
- The user must use the "mass reassignment" func on to transfer mul ple pa ents from one HBPC team to another HBPC team.

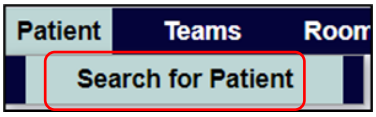
13.2 Search for a Pa ent

When searching for a pa ent, a user can only view pa ent informa on on a need-to-know basis. The role assigned to the user dictates the pa ent informa on they are allowed to view. Typically, a user is restricted to viewing pa ent informa on only for those pa ents assigned to the sta on or sta ons that has/have been assigned to their User ID.

- **Note:** An employee cannot view their own data.

12. From the **Pa ent** drop-down menu, select **Search for Pa ent** to display the *Search for Pa ent* screen.

Figure 100 - Search for a Pa ent Menu Op on



13. Enter the following search criteria:

- Enter the first ini al of the last name, plus the last 4 digits of a social security number.
- Enter the Social Security number (complete in xxx-xx-xxxx format) in the **SSN** text box.
- Enter the pa ent's last name in the **Last Name** text box.
- Enter the pa ent's first name in the **First Name** text box.
- Click **Find** to display the pa ent informa on or a list of pa ents in the lower part of the screen that match the search criteria.
- **Note:** A user must enter at least the first ini al or last 4 digits of SSN, last name, first name OR full SSN to execute a Pa ent Search.

Figure 101 - Search for a Pa ent Screen

- If pa ent record is labeled as Sensi ve Pa ent, the SSN and DOB are masked.
- If the system returns more than the maximum number of records allowed, the complete list of records will not display. A user can filter the search criteria further (described below), or search for the pa ent in VistA.

13.3 If the system cannot find a pa ent

If the system cannot find a pa ent that matches the criteria entered, the following message will display:

- "No matches found for the criteria entered. Validate or expand your search criteria."

1. Click **Close** to exit out the message box.

- The system will display an addi onal **Find in VistA** bu on for Vista mapped sta on or **Find in Cerner** bu on for Cerner mapped sta on.
- VistA/Cerner search requires at least three le ers of the last name, OR the full SSN, first name, and Date of Birth to perform a search.

2. Enter the search criteria and select the **Find in VistA** or **Find Cerner** bu on (depending on sta on mapping).
   - **Note:** Ensure each PCMM Web user has VistA privileges for the Vista mapped sta on(s) they have access to in PCMM Web. If not, an error may display.
3. The screen will refresh with the VistA or Cerner results displayed. If no records match criteria, a message will display. Validate or try the search criteria again.
4. To add the VistA or Cerner pa ent, select the **Name** link which navigates to the Pa ents Profile screen.
5. Once a pa ent is selected, the system will check to see if the pa ent is:
   - A known pa ent to PCMM Web for the local sta on (no further ac on is require)
   - A new pa ent to PCMM Web.
   - If the pa ent record cannot be imported into PCMM Web, a message will display.
6. Choose **Select** to validate the pa ent record; the *Pa ent Profile* is displayed.
   - **Note:** Once a pa ent is pulled into PCMM Web from VistA, the pa ent will no longer appear in the VistA search results, only in the PCMM Web search results.

13.4 View a Pa ent Profile

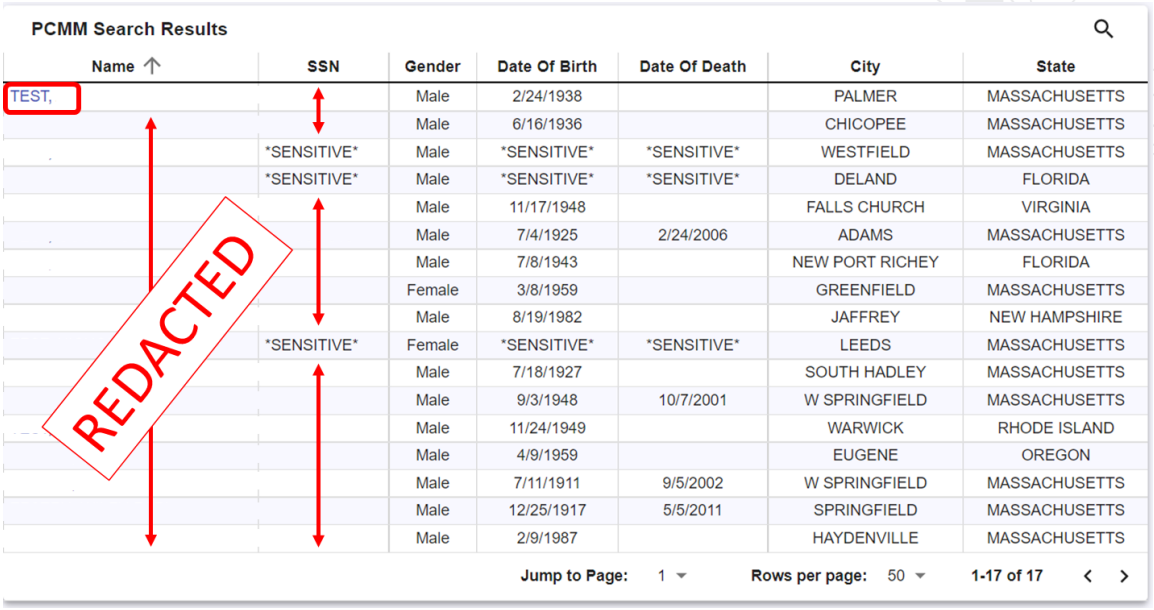
A user can view a pa ent's profile on the *Pa ent Profile* screen.

1. From the **Pa ent** drop-down menu, select **Search for Pa ent** to display *the Search for Pa ent* screen.
2. Enter the necessary data to narrow the search and click **Find** to display the pa ent informa on or a list of pa ent names.

Figure 102 - Search for Pa ent Screen to View or Modify a Pa ent Profile

3. Click on a **pa ent name link** in the PCMM Search Results to display the *Pa ent Profile* screen.

Figure 103 - Search for Pa ent Screen with the Pa ent Name Selected



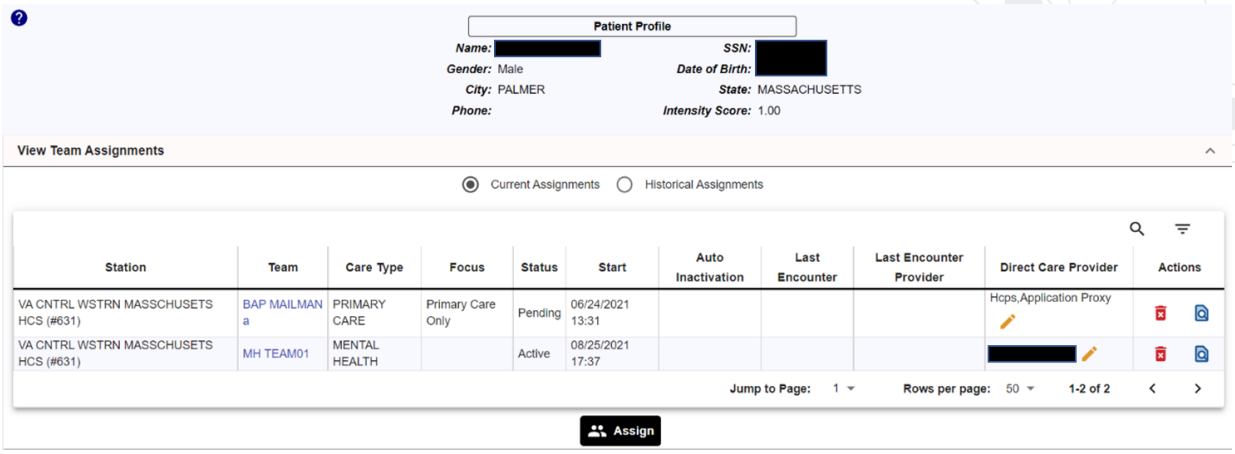
The Pa ent Profile screen displays:

- Pa ent Demographics
- Team Assignments for the Pa ent
- Mul ple Primary Care Provider Requests
- Ac ve Non-VA Providers
- Inac ve Non-VA Providers History
- Panel Placement Requests

From this screen, a user can:

- Assign, and unassign a Pa ent to or from a team (if a user has permission)
- Reassign the direct care provider
- Update/Review a Pa ent's Mul ple PCP Requests
- View/Search/Assign for ac ve Non-VA providers
- View/Create PACT Panel Requests

Figure 104 - View or Modify the Pa ent Profile Screen

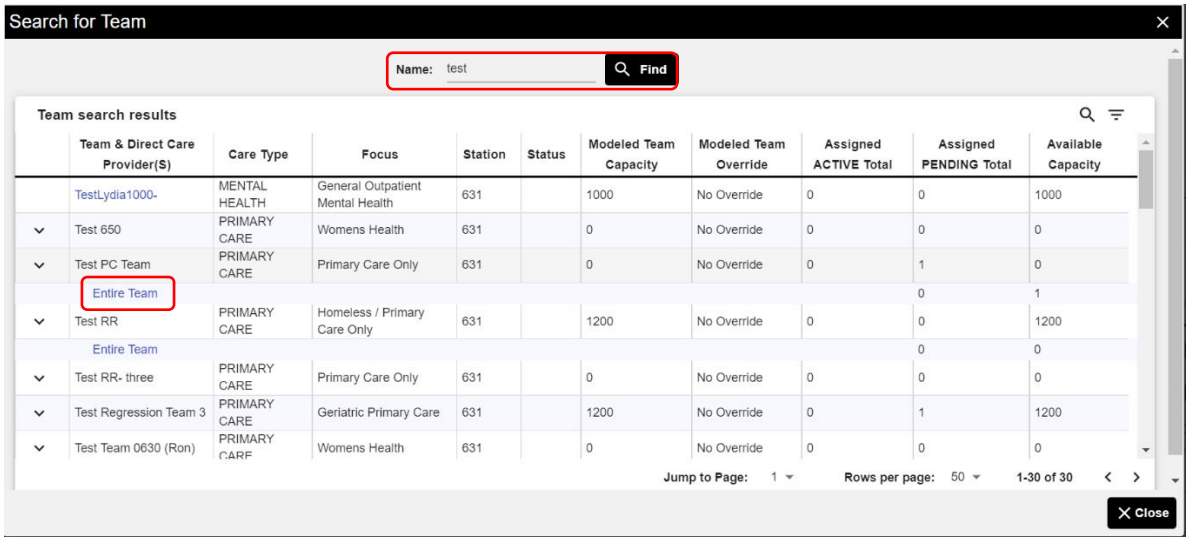


13.5 Assign Pa ent to a PACT Team

The following steps explain how to assign a pa ent to a PACT Team.

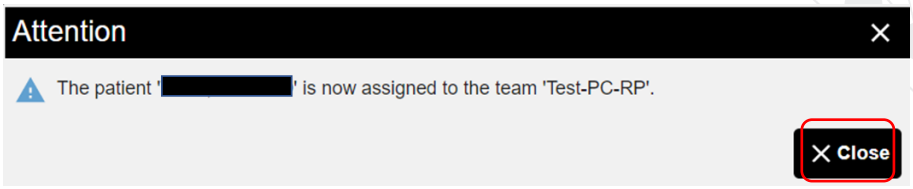
1. Navigate to the *Pa ent Profile* screen. In the View **Team Assignments** sec on, click the **Assign** bu on to display the *Search for Team* box.
2. Enter a team name in the **Name** field or click the **Search** bu on, to search for a team. Select the **En re Team** link to assign the pa ent to the team.
   - **Note:** If **En re Team** is selected, this assignment will be inherited by all Qualifying team roles, with an explicit assignment to the PCP.

Figure 105 - Search for Team to Assign a Pa ent to a PACT Team



3. Click **Submit** to assign the pa ent to the team. A confirma on message will appear if the assignment was successful. Click **OK** to con nue.
   - Once the pa ent is assigned, a confirma on message is displayed indica ng the assignment was successful.

Figure 106 - Pa ent Assigned to a Team A en on Box



The assignment has been made and the assignment informa on now populates the **View Team Assignments** sec on. The pa ent will need a valid encounter with any member of the teamlet except the Administra ve Associate to flip the Status of the PACT team assignment from PENDING to ACTIVE.

When a valid encounter is detected for the pa ent, the following occurred for the PACT assignment on the **View Team Assignments** sec on on the Pa ent Profile screen.

- Status Column now displays ACTIVE
- Start date column now displays the earliest encounter date
- Last Encounter column now displays the most current encounter
- Direct Care Provider now displays the most current encounter with the care provider

1. Assign a pa ent to another PACT Team at another facility within the same 3-digit sta on code. Repeat steps 1-4.
2. A er the assignment process the pa ent has two PACT team assignments, one in ACTIVE status and the other in PENDING status. If an encounter is detected with a qualifying member of the PENDING team assignment, this team assignment will automa cally flip to ACTIVE and the ACTIVE team assignment will become INACTIVE.
3. Mul ple PACT team assignments per pa ent are allowed within PCMM Web, providing the following criteria is meet:
   - Each pa ent is allowed to have only one ACTIVE and one PENDING PACT assignment simultaneously within the same 3-digit sta on code to include all of the substa ons at any given me. The PENDING PACT assignment can only be generated a er an ACTIVE assignment exists.
   - Each pa ent is allowed to have more than one ACTIVE PACT team assignments across the enterprise ONLY if there is an overall APPROVED Mul -PACT Request that is approved by all 3-digit sta ons holding a current ACTIVE PACT assignment as well as the sta on reques ng the new PACT assignment.

13.6 Encounter Date

When assigning a pa ent to a new PACT team and the user has clicked the **Submit** bu on, PCMM Web will immediately search for any valid encounters in external system (VistA or Cerner, depending on sta on mapping) within the last 90 days with any qualifying member to include PCP and AP, if a pa ent is assigned to the AP. If an encounter is found, the Last Encounter date column on the Pa ent and Team Profiles will be updated to the date of the

encounter or the earliest date a er the encounter that does not break business rules and the pa ent's PACT team Status "flips" automa cally to ACTIVE.

Encounters in PCMM Web are considered valid only a er they are completed/checked out in external system by the encountering PACT qualifying member. Encounters may start on 1 day but may not be completed/checked out un l a future date. The system only evaluates completed/checked out encounters. Encounters are evaluated by 2 processes:

- 90-day lookback – This process evaluates encounters from the past 90 days at the me of assigning a pa ent to the PACT team. This is the only me the 90-day lookback process occurs. If the system finds a valid completed/checked out encounter, it will be applied to the pa ent's PACT assignment at the me of assigning the pa ent to the PACT team.
- Nightly Auto-Inac va on (AI) job – This process evaluates completed/checked out encounters from the last date this process ran for pa ents that are already assigned to a PACT team and are wai ng on the encounter to be applied to their PACT assignment. If an encounter occurs a er the pa ent is assigned to a PACT team, then the nightly AI job is responsible for picking up the valid qualifying encounter. This process starts checking for valid qualifying encounters from the last me the nightly AI job ran for a site.

For an exis ng ACTIVE PACT assignment, if an encounter has occurred within the past 24 months with any core PACT qualifying member, then the Last Encounter date column on the Pa ent and Team Profile will be updated. This date will update each me a pa ent has a valid encounter with one of the PACT qualifying members.

For a PENDING PACT assignment, if the assignment is in PENDING status and a valid qualifying encounter has been detected by the night AI job, then the Last Encounter Date and the Start Date of this team assignment will be set to the date of this encounter. This will cause the team Status to "flip" to ACTIVE.

The START DATE of a PACT assignment should reflect the date the pa ent was assigned to the team if this is a new pa ent PACT assignment with no previous PACT assignments within the 3-digit sta on.

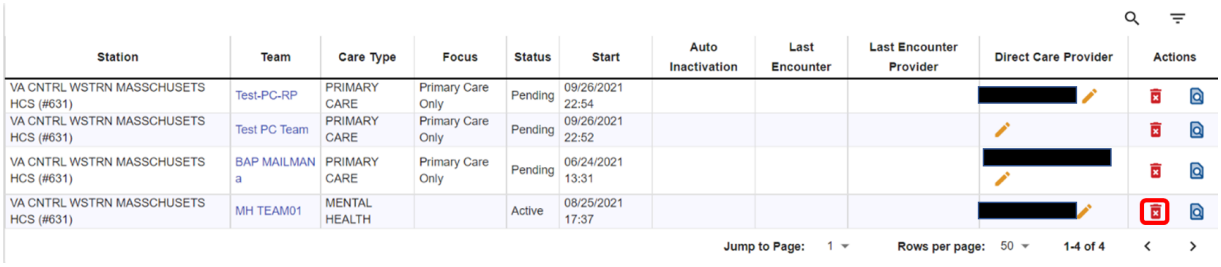
- If an encounter is applied to a pa ent's profile, the START DATE may or may not change to reflect the First Encounter Date. If the pa ent had no previous PACT assignments, the First Encounter Date will display as the START DATE.
- If an encounter is applied to a pa ent's profile and the pa ent had previous PACT assignments within the same 3-digit sta on, then the START DATE will be consistent with the END DATE of the most recent PACT assignment to prevent assignment overlaps within the system.
- **NOTE:** The Administra ve Associate does not count since the staff member cannot enter encounters.

13.7 Unassign a Pa ent from a Team

A pa ent can be unassigned from a team from the *Pa ent Profile* screen.

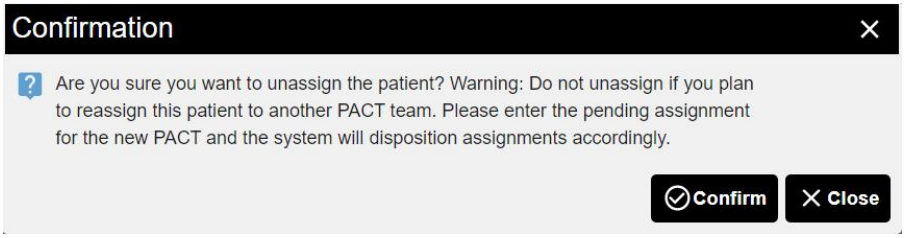
1. In **View Team Assignments** sec on of the *Pa ent Profile* screen, view the list of teams the pa ent is assigned or has been unassigned.
2. Click the **Unassign Pa ent from a Team** icon (red "X") in the **Ac ons** column.
   - **Note**: To view a descrip on of the icon, move the mouse cursor over the icon.

Figure 107 - Unassign a Pa ent from a Team from the Pa ent Profile Screen



   - Once clicked, the *Confirma on* warning box displays to verify whether to unassign the pa ent from the team.
3. Click **OK** to display the *Team Unassignment for: Team name* dialog box or **Cancel** to return to the Pa ent Profile.

Figure 108 - Unassignment Confirma on Message



4. In the dialog box, select a value from the **Reason** drop-down menu.
   - Either accept today's default date or enter a new date in the **Effec ve Date** field. The effec ve date cannot be before the current assignment date and cannot be a past date.
5. Click **Submit** to save the data, or **Cancel** to return to the screen without saving the informa on.

Figure 109 - Team Unassignment Box

6. The system will display a confirma on message. Click **Close** to exit.

13.8 Verify the Unassignment

To view the unassigned pa ent to the team, navigate to the *Team Profile* screen. In the **View Pa ent Assignments** sec on with the Current Assignments radio bu on selected, the pa ent deleted no longer displays. Select **Historical Assignments** radio bu on and the following informa on displays:

- Status column displays CANCELED for the current team status
    - PENDING status goes to CANCELED
    - ACTIVE status goes to INACTIVE
- End date column displays the date and me the unassignment was made
- End Reason column displays the selected reason
- Ac ons column may display any combina on of three op ons:
    - Revert assignment to ac ve
    - View pa ent assignment history
    - Convert assignment to canceled. This ac on is permanent and cannot be undone

13.9 Reassign a Pa ent to Team Role (Posi on)

A user can reassign a Direct Care Provider associated with a pa ent.

1. In the **View Team Assignments** sec on of the *Pa ent Profile* screen, click the pencil icon in the Ac on column to display the *Reassign posi on for Team* box.
2. Select the calendar icon next to the **Effec ve Date** field to select a new date or accept the current default date.
    - The effec ve date cannot be before the current assignment date and cannot be in the past.
3. In the **Assign to** drop-down, select the care provider to assign to a pa ent.
    - Choose **En re Team** if the pa ent is assigned to a team with a care type of *Primary Care* or assign to an AP if appropriate.
    - If the pa ent is assigned to a team with a purpose other than Primary Care, the system will display current and ac ve PCP or Associate Providers.
4. Click **Submit**.
5. A confirma on message displays indica ng that team role reassignment was successfully.
6. In the View Team Assignments sec on, the Direct Care Provider is updated to reflect the recent reassignment.
    - To view the pa ent assignment history associated with any team, click the **magnifying glass icon** in the Ac on column to display the *Timeline history* window.

13.10 Reassign a Pa ent to a Team

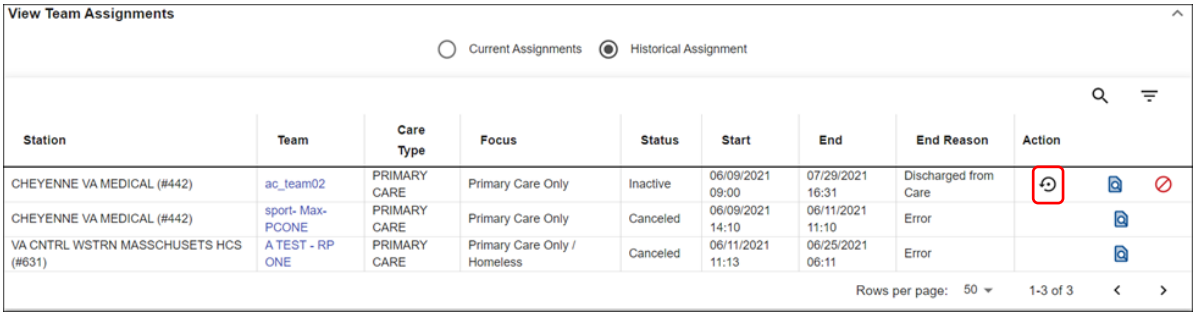
On the *Pa ent Profile* screen in the View Team Assignments sec on, the user can reassign a pa ent to a team by u lizing the same Assign process. This applies to both PC and Non-PC teams.

- **Note:** This process only applies to a single pa ent. To reassign more than one pa ent at a me, the user will use the Perform Batch Opera ons process that allows two or more pa ents to be moved.

13.10.1 PC Teams Only - Revert INACTIVE assignment to ACTIVE.

1. In the **View Team Assignments** sec on of the *Pa ent Profile* screen, click the revert icon in the **Ac on** column to display the *Reassign posi on for Team* box.

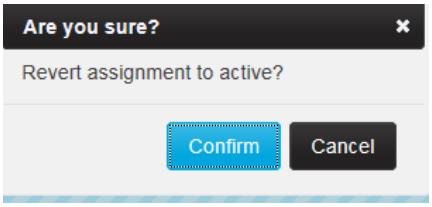
Figure 110 - Reassign a Pa ent from the View Team Assignment Sec on



- PCMM Web will allow the user to revert an INACTIVE PACT assignment back to its previous ACTIVE status and retain the previous ACTIVE team informa on, if necessary. This will allow the assignment to the PACT team to bypass the qualifying encounter interroga on and to automa cally revert back to Ac ve. This func onality is only available for the latest INACTIVE assignment to the PACT team.
- The 'revert' icon cannot be used to reac vate the latest INACTIVE assignment back to ACTIVE by removing the End Date if the pa ent was assigned to another PACT or HBPC team a er the assignment was inac vated. A business rule prevents team assignments from overlapping. If another PACT/HBPC team was assigned a er the inac vated team needing to be re-ac vated, then an overlap in the meline history occurs and the system will prevent this ac on. For example, Team A unassigned on 8/1/15, then assigned to Team C on 9/1/15. Team A cannot be reverted because now the meline has another entry for Team C and Team C's Start Date is a er Team A's End Date. Team C's Start Date cannot be removed from the meline history table to allow the revert to occur.

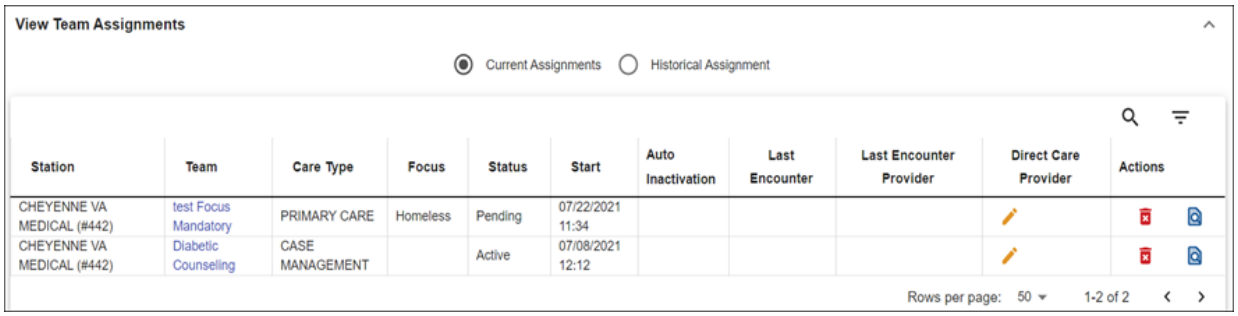
2. The user is prompted to confirm the ac on to revert the INACTIVE assignment. Click **Confirm**.

Figure 111 - Revert Assignment to Ac ve Box



3. A confirma on message is displayed. Click **Close** to display the *Pa ent Profile* screen.
4. The INACTIVE PACT assignment is now displayed as ACTIVE with all of the previous ACTIVE team assignment informa on. The End Date and End Reason have been removed and the Last Encounter date remains the same.

Figure 112 - Assigned Pa ent on the View Team Assignments Sec on

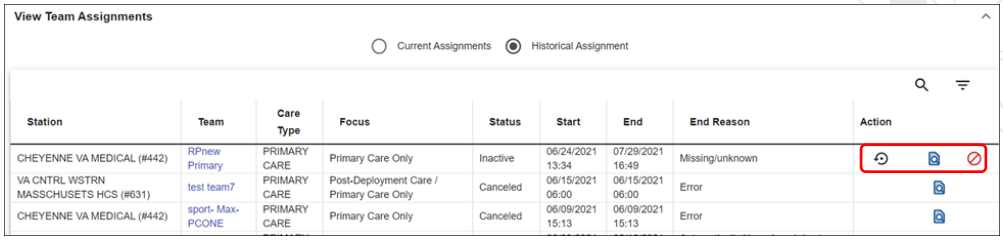


13.10.2 PC Teams Only - Convert an INACTIVE assignment to CANCELED

PCMM Web will allow the user to convert the Status of an INACTIVE PACT assignment to CANCELED which will allow the user to then reassign the pa ent to the needed team and team role.

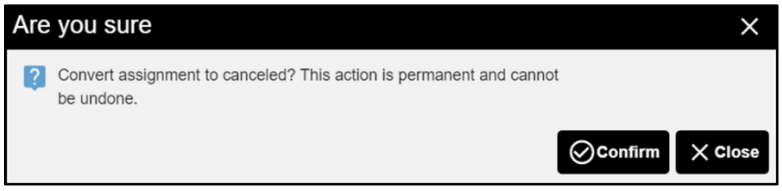
1. In the **View Team Assignments** sec on of the *Pa ent Profile* screen, click on the cancel icon under the **Ac ons** column.
   - Since CANCELED assignments are not considered when interroga ng for valid encounters on more recent assignments by PCMM Web, this will allow the user to reassign the pa ent to the needed PACT team and team role which will create an ACTIVE assignment.
   - This func onality is only available for INACTIVE PACT assignments.
   - **Note:** If the encounter date for the INACTIVE assignment is more than 60 days old, then a new encounter would be required even if the assignment was converted to CANCELED and the pa ent reassigned.
2. Click the convert icon in the **Ac ons** column.

Figure 113 - Reassign a Pa ent to PC Team on the View Team Assignments Sec on



3. The user is prompted to confirm the ac on to convert the INACTIVE assignment. Click **Confirm**.

Figure 114 - Reassignment Confirma on Message

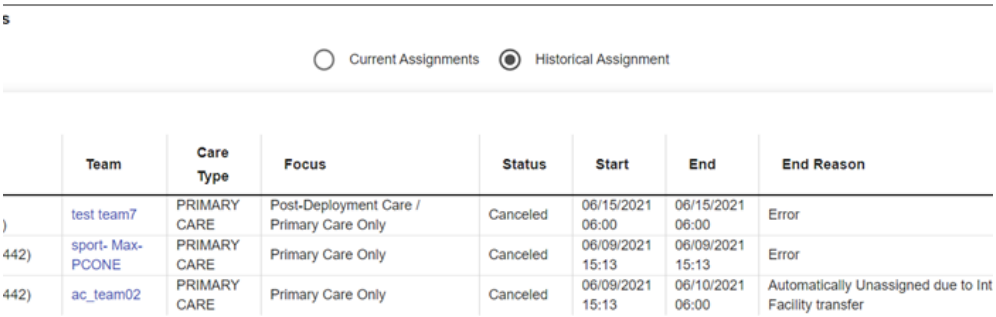


4. A confirma on message is displayed. Click **Close** to display the *Pa ent Profile* screen.

The INACTIVE PACT assignment is now displayed as CANCELED. The End date and End Reason have been updated and the Last Encounter date remains the same.

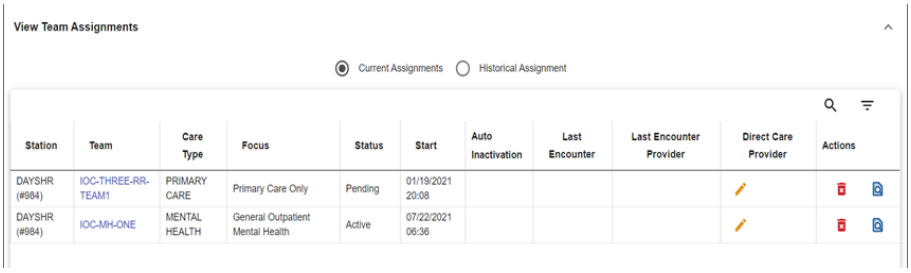
5. Click the **Assign** bu on to reassign the pa ent to the needed team and team role.

Figure 115 - Reassign Pa ent to PACT Team on View Team Assignments Sec on



The CANCELED PACT assignment is now displayed as ACTIVE. The user selected to assign the pa ent to the AP instead of the PCP during this reassignment. The End date and End Reason have been removed and the Last Encounter date was updated with the most recent encounter date within the past 60 days. PCMM Web found the encounter date that was used for the previous assignment to the team and used it to flip this assignment to ACTIVE.

Figure 116 - Assigned Team Displays as Ac ve



14 Non-PC Team assignments

The pa ent can have many other Non-PC team assignments. When assigned, the team assignment is automa cally displayed as ACTIVE. Encounter dates are not used to ac vate Non-PC care types. These assignments will be either ACTIVE or INACTIVE.

Only the assigned MHTC for MH teams and Lead Coordinator for Transi on and Care Management teams will be displayed in the Direct Care Provider column.

- **Note:** For Transi on and Care Management teams, the pa ent can ONLY be assigned to one of these teams per 3-digit sta on code to include all substa ons. Once a team has been created with this Care Type, the Care Type will no longer be displayed in the Care Type drop-down when crea ng a new team. The exis ng team for Transi on and Care Management will be displayed in the List all Teams and Search for Team displays.

14.1 Mass Reassign/Unassign Pa ents

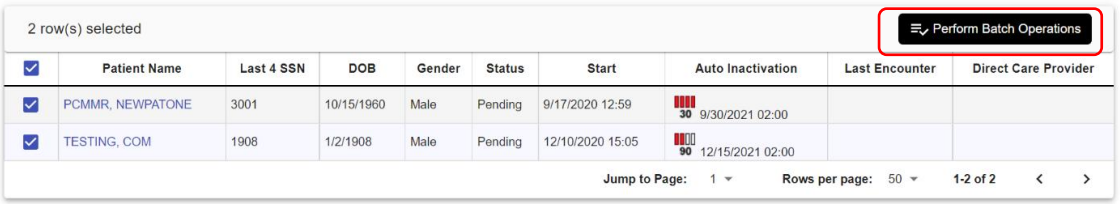
The mass transfer process enables a user to assign, reassign or unassign one or more pa ents from a team to another team, or a one posi on to another posi on on the same team.

- To transfer pa ents from one team to another team, the user **MUST** be on the *Team Profile* screen.
- To transfer pa ents from one posi on to another posi on on the same team (e.g. AP to En re Team (PCP) / En re Team (PCP) to AP / AP to AP), the user **MUST** be on the *Team Posi on Profile* screen that the staff members are explicitly assigned to before the moved is allowed. A valida on error will occur when moving pa ents on the same team from the *Team Profile* screen.
- Pa ents with a date of death (DOD) cannot be transferred.
- When transferring pa ents from one team to another team, the pa ents will be unassigned from the current team and can be viewed from the Historical Assignments in the **View Pa ent Assignment** sec on.
- When transferring a pa ent from one ac ve team to another ac ve team with an APPROVED Mul PACT for the previous assignment, that status is transferred to the new assignment.
- To reassign pa ents back to a team, navigate to Historical Assignments in the **View Pa ent Assignments** sec on either on the *Team Profile* screen or *Team Posi on Profile* screen.

14.2 Mass Reassign from the Team Profile Screen

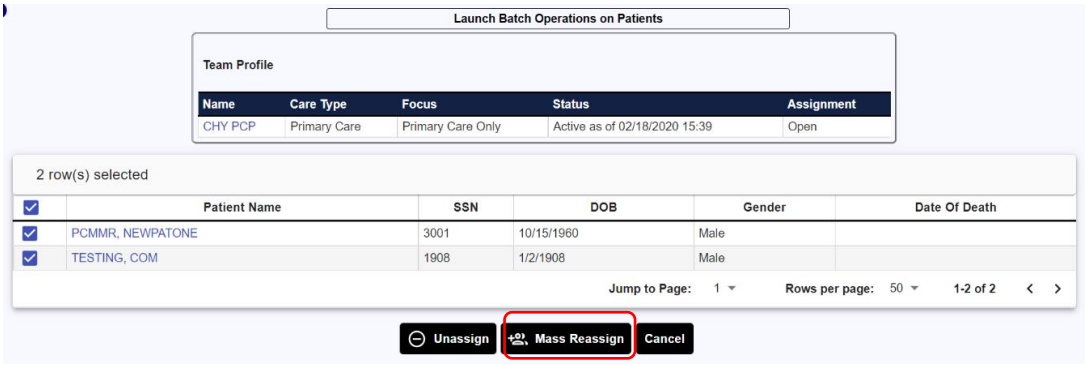
1. In the **View Pa ent Assignments** sec on on the *Modify an Exis ng Team* screen, select **pa ent name** checkboxes to reassign and click the **Perform Batch Opera ons** bu on. The *Launch Batch Opera ons on Pa ent* page displays.

Figure 117 - Mass Reassign on the Team Profile Screen



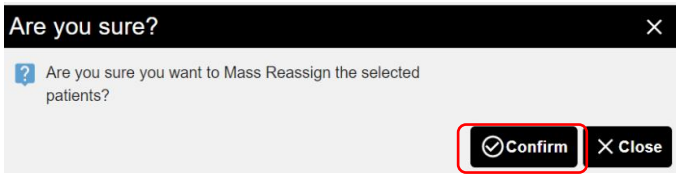
2. Click the **Mass Reassign** bu on to reassign the pa ents to a team. To remove a pa ent from the list, unselect the check box next to the pa ent's name.

Figure 118 - Mass Reassign on the Launch Batch Opera ons on Pa ents Screen



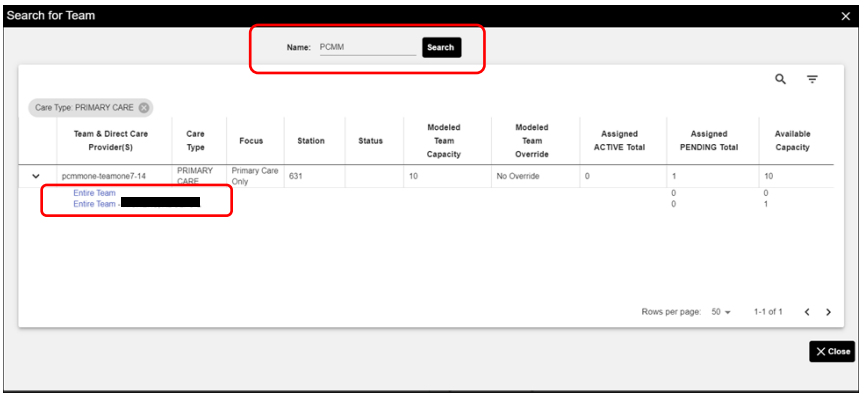
3. A confirma on box displays. Click **Confirm** to con nue or **Cancel** to exit the mass reassignment process. The *Search for Team* box displays.

Figure 119 - Confirma on Message for the Mass Reassignment



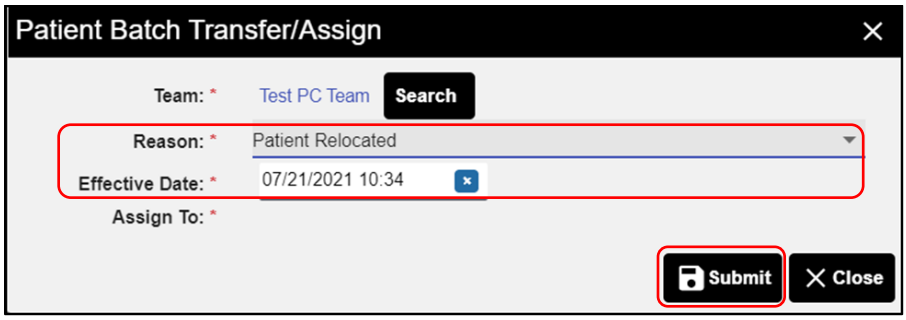
4. Enter a team name in the **Name** field or click the **Search** bu on, to search for a team. Click either the **En re Team**, **Associate Provider**, or **Medical Student** link to display the *Pa ent Batch Transfer/Assign* screen.

Figure 120 – En re Time Link Selected on the Search for Team Box



5. Select a reason for the transfer from the **Reason** drop-down. The **Effec ve Date** and **Assign to** auto-populates. The **Assign to** displays the name of the PCP, AP, or Medical Student when pa ents are assigned.
6. Click **Submit** to complete the transfer.

Figure 121 - Pa ent Batch Transfer/Assign Box



7. A message displays, indica ng the pa ents are reassigned and to view the Alerts for the comple on status of the assignment and to verify the assignment was made to the correct team.

14.3 Verify the Assignment

To view the newly assigned pa ents to the team, navigate to the *Team Profile* screen. In the **View Current Assignments** sec on, the Status is now Pending and will require a new encounter with a qualifying member to make the new assignment Ac ve. Since the pa ents were assigned to the En re Team, the Direct Care Provider column now displays the PCP's name. Or, verify on the *Team Posi on* screen. In the **View Team Assignments** sec on, view the pa ents that were successfully assigned to the provider they were assigned.

Also, verify the historical trail of assignments for the pa ents are correct. The newly reassigned pa ents to the team will s ll have an entry for the previous assignment with the End date. In the **View Pa ents Assignments** sec on of a *Team Profile* or *Team Posi on* screen, select the **Historical Assignments** radio bu on. The dates for the reassignment should not overlap with the dates of the unassignment. All assignment dates should flow in a sequen al pa ern.

14.4 Transfer Pa ents from Posi ons on the Same Team

1. In the **View Pa ent Assignments** sec on on the *Modify an Exis ng Posi on* screen, select **pa ent name** checkboxes to reassign and click the **Perform Batch Opera ons** bu on. The *Launch Batch Opera ons on Pa ent* page displays.
2. The team and the posi on informa on involved with the transfer are displayed above the pa ent list.
3. Click the **Mass Reassign** bu on to reassign the pa ents to a team. To remove a pa ent from the list, unselect the check box next to the pa ent's name.
4. A confirma on box displays. Click **Confirm** to con nue or **Cancel** to exit the mass reassignment process.

5. Since the transfer is between posi ons on the same team, enter the **same team name** that the pa ents are currently assigned in the **Name** field or click the **Search** bu on, to search for a team.
6. Click either the **En re Team**, **Associate Provider**, or **Medical Student** link to display the *Pa ent Batch Transfer/Assign* screen.
7. Select a reason for the transfer from the **Reason** drop-down. The **Effec ve Date** and **Assign to** auto-populates. The **Assign to** displays the name of the PCP, AP, or Medical Student when pa ents are assigned.
8. Click **Submit** to complete the transfer.
9. A message displays, indica ng the pa ents are reassigned and to view the Alerts for the comple on status of the assignment and to verify the assignment was made to the correct team.

14.5 Mass Assignment From Historical Assignment

If one or more pa ents are unassigned from the *Team Profile* screen or the *Team Posi on Profile* screen, a mass reassignment is possible through the Historical Assignments.

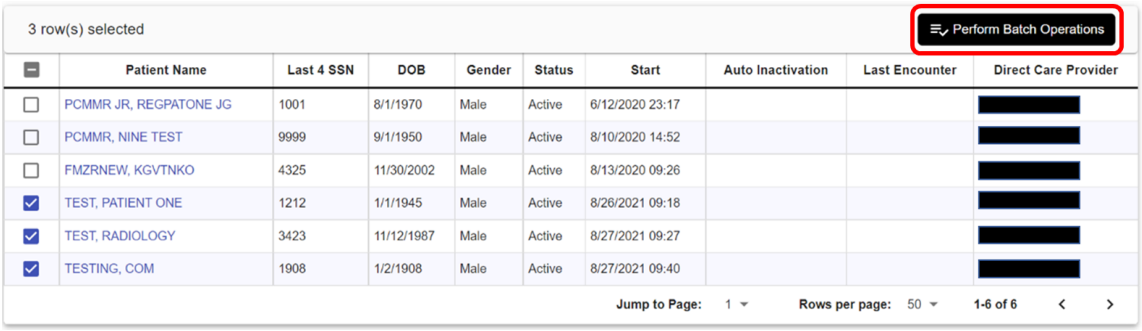
1. In the **View Pa ent Assignments** sec on on the *Modify an Exis ng Team* or *Modify an Exis ng Posi on* screen, select the **Historical Assignments** radio bu on.
2. Select the **pa ent name** checkboxes and click the **Perform Batch Opera ons** bu on.
3. The team and the posi on informa on involved with the transfer are displayed above the pa ent list. Click the **Mass Reassign** bu on to reassign the pa ents to a team. To remove a pa ent from the list, unselect the check box next to the pa ent's name.
4. A confirma on box displays. Click **Confirm** to con nue or **Cancel** to exit the mass reassignment process.
5. Enter a team name in the **Name** field or click the **Search** bu on, to search for a team. Click either the **En re Team**, **Associate Provider**, or **Medical Student** link to display the *Pa ent Batch Transfer/Assign* screen.
6. Select a reason for the transfer from the **Reason** drop-down. The **Effec ve Date** and **Assign to** auto-populates. The **Assign to** displays the name of the PCP, AP, or Medical Student when pa ents are assigned.
7. Click **Submit** to complete the transfer.
8. A message displays, indica ng the pa ents are reassigned and to view the Alerts for the comple on status of the assignment and to verify the assignment was made to the correct team. Also, the user can verify that the Status has changed to Pending requiring a new encounter date to make the new assignment ac ve.
    - When assigning pa ents from a Historical Assignment, the original historical entry for the pa ent will not be removed. This will allow the historical entry to remain, but the pa ent is moved to the Current Assignment list.

14.6 Mass Unassign Pa ents

A user can perform a mass unassignment of pa ents from the *Team Profile* screen or the *Team Posi on Profile* screen. Both can be completed in the **View Pa ent Assignments** sec on and applies for current assignments. The example below is from the *Team Profile* screen.

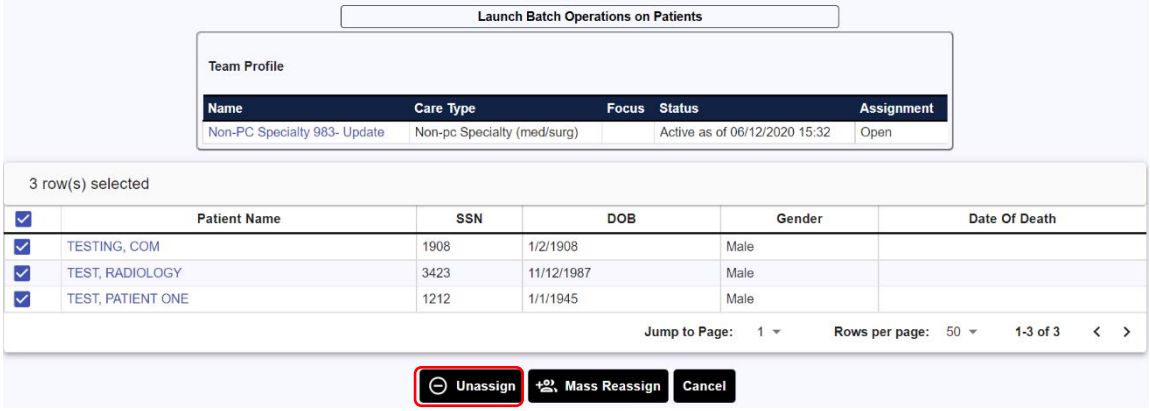
1. In the **View Pa ent Assignments** sec on on the *Modify an Exis ng Team* screen, select **pa ent name** checkboxes to unassign and click the **Perform Batch Opera ons** bu on. The *Launch Batch Opera ons on Pa ent* page displays.

Figure 122 - Unassign Pa ents from the Team Profile Screen



2. Click the **Unassign** bu on to unassign the pa ents to a team.

Figure 123 - Unassign from the Launch Batch Opera ons Pa ents Screen



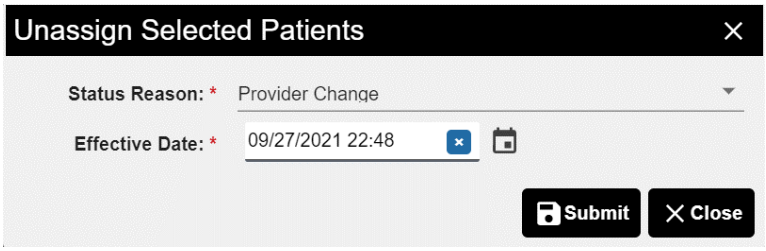
3. A confirma on box displays. Click **Confirm** to con nue or **Cancel** to exit the unassignment process. The *Unassign Selected Pa ents* box displays.

Figure 124 – Unassign Confirma on Message

4. Select a reason for the unassignment from the **Reason** drop-down.

5. Select the calendar icon next to the **Effec ve Date** field to select a new date or accept the current default date. The effec ve date can be a past date but cannot be future dated.
6. Click **Submit** to display the *Pa ent Batch Transfer/Assign* screen.

Figure 125 - Unassign Selected Pa ents Box



7. A message displays, indica ng the pa ents are unassigned and to view the Alerts for the comple on status and to verify the unassignment was made to the correct team.
   - During the process of unassigning pa ents from the team, pa ents are automa cally unassigned from any explicit assignments to a team posi on. The unassigned pa ents now display in the **Historical Assignments** on both the *Team Profile* screen and the *Team Posi on* Profile screen.
   - If an unassigned pa ent was assigned to the PCP posi on or the En re Team, the unassigned pa ent will be displayed in the *PCP Posi on Profile* screen as a Historical Assignment in the **View Pa ent Assignments** sec on.
   - If an unassigned pa ent was explicitly assigned to an AP posi on, the unassigned pa ent will be displayed in the *AP Posi on Profile* screen as a Historical Assignment in the **View Pa ent Assignments** sec on.
   - The user can verify that the Status of the team assignments have changed from Ac ve assignments to Inac ve assignments or Pending assignments to Canceled assignments along with the End date and me and the Reason.

15 Auto Inac va on of a Pa ent from a Team

Pa ents must have been established and have an assignment to Primary Care teams to be eligible for Auto Inac va on. A pa ent's assignment status to a team will be inac vated automa cally by the system in the following circumstances.

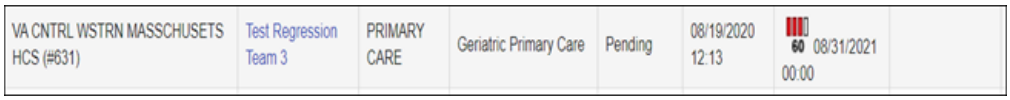
1. **Automa c inac va on due to inac vity.**

   For each pa ent that has an ac ve team assignment with a Care Type = *Primary Care*, the system will check when the pa ent had an encounter with any member of the PACT teamlet (i.e., the Primary Care Provider, Associate Provider, Nurse Care Manager, Clinical Associate) and will use that last encounter date as follows:

   - Pa ents must have ac ve assignments to teams and be eligible to have their Last Encounter Date with that team recorded.

- When a pa ent has been iden fied for auto inac va on, the selected date will be displayed in the View Team Assignments table. Icons will display the amount of days before the pa ent will be auto inac vated.

Figure 126 - Pa ent has been Iden fied for Auto Inac va on



- When a pa ent dies who is assigned to a team, the pa ent record is automa cally moved from the Current Assignments list to the Historical Assignments list.
- The system will schedule the pa ent for automa c inac va on and send out a email if the pa ent
    - has never had qualifying encounter within 120 days before 12 months from assignment to the team

    — OR —

    - has had at least one previous qualifying encounter but not had another within 120 days before 36 months from the ac ve assignment date
- If the Scheduled Inac va on Date is within 120 days of the current date, PCMM Web will send out an alert sta ng that the pa ent will be automa cally inac vated in 120 days unless an encounter occurs with a member of the PACT teamlet or is extended by a PCMM Web user. When the date of the scheduled inac va on arrives, and the pa ent is not extended or does not have a qualifying encounter, the pa ent will be automa cally unassigned from his current PACT team and team roles. Assignments will then reflect a status of "Automa cally unassigned due to Inac vity."
- If Date Flagged for Inac va on had been previously recorded and a subsequent qualifying encounter is found before the team role and the team were unassigned; the assignment will remain ac ve.

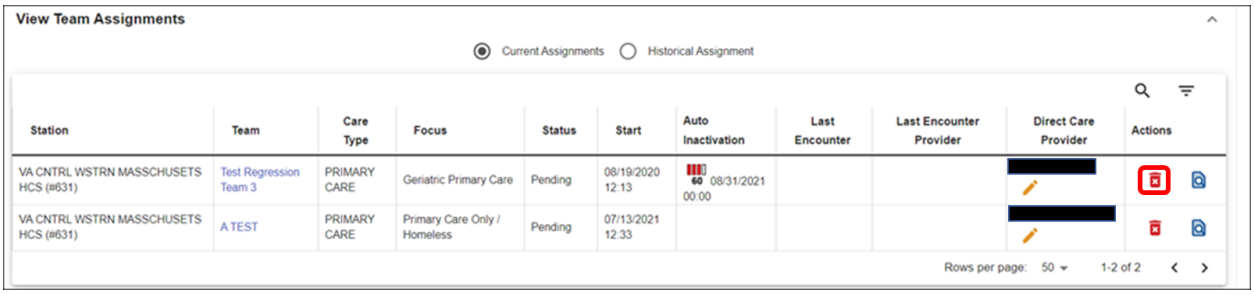
2. **Automa c inac va on due to Date of Death recorded for a pa ent in VA teams.**
    - When a Date of Death is recorded, the pa ent will be automa cally unassigned from the current PC team and team role assignments with a status of *Automa cally unassigned due to death*. The system will send out the Automa cally Inac vated Death alert) sta ng that the Pa ent has been automa cally inac vated.
    - When a Date of Death is rescinded, the pa ent will be automa cally reassigned to the current PC team and team role assignments. The system will retrieve this data and populate the Posi on and Team Assignment Date on the PCMM Pa ent Team Assignment file and the Pa ent Provider Rela onship (if needed) file. The date the pa ent was reassigned to the team will be recorded and displayed in PCMM web.

15.1 Manual Unassignment of Pa ent from a Team

A pa ent's assignment to any team can be unassigned by clicking the red "X" in the ACTION column.

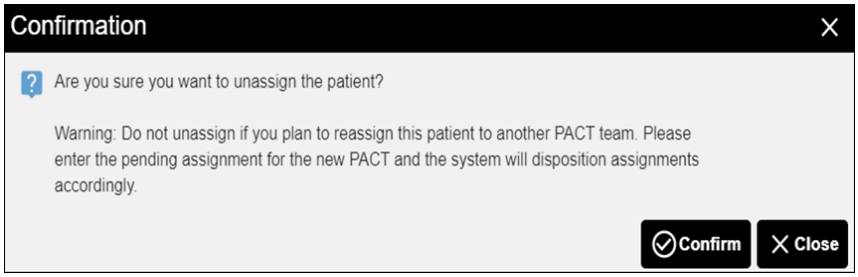
1. Once the pa ent's profile is opened in PCMM Web, click the **View Team Assignments** toggle link to display the current list of teams to which the pa ent is assigned.
2. Verify that the **Show: Current Assignments** radio bu on is selected (it is by default).
3. Click on the red "X" to manually unassign a pa ent from the team.

Figure 127 - Manually Unassign a Pa ent from a Team



4. Once the red "X" has been clicked, a *Confirma on* pop up appears with a WARNING for the user.

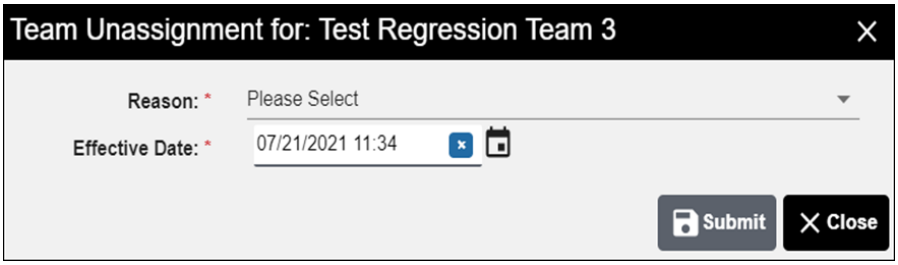
Figure 128 - Manual Unassignment Warning Box



»

5. User will click OK.
6. The *Team Unassignment* pop-up appears and allows a user to select a REASON and EFFECTIVE DATE. The EFFECTIVE DATE can be backdated but it cannot be future dated.
7. Select **Submit** or **Cancel** to cancel.

Figure 129 - Team Unassignment Reason



16 Mul ple PACT Requests for Pa ent

Each pa ent must have only one assigned PACT within the VA system. When mul ple PACT assignments are requested, a clinical decision (approval/denial) will be required. There can only be one ac ve request per pa ent per 3-digit sta on at a me. Also, there can be mul ple requests for the same pa ent at different sta ons at one me. A user can view all requested assignments for Mul ple PC teams for a pa ent on the Pa ent Profile screen.

- **Note:** Mul ple PACT requests were previously known as Dual Assignment Request. Mul ple PACT requests, MPACT, and Mul ple PCP requests refer to the same process – all are interchangeable terms.
- If there are no ac ve PC Assignments for this Pa ent at other sta ons, the mul ple PACT request cannot be created.
- A mul -PACT request will be auto-generated while the assignment has a pending status.

When a pa ent is being assigned to a PACT team at the local sta on, the pa ent's PACT assignments will be evaluated enterprise-wide to determine if an ac ve PACT assignment exists in another 3-digit code sta on. If determined and the pa ent has one or more ac ve PACT assignment(s) at other 3-digit code sta ons, then the system will automa cally generate a Mul ple PACT Request (MPACT).

- There can only be one pending request per pa ent per 3-digit code sta on at a me. The Mul ple PACT request cannot be used to request an assignment within the same 3-digit code sta on.
- There can be mul ple requests for the same pa ent for different 3-digit code sta ons at one me.
- In order to create/edit a Mul ple PACT request for a pa ent, the pa ent must not have a Date of Death associated. If so, a Mul ple PACT request will not be created.
- If there is a PENDING PACT assignment that turns to ACTIVE at another 3-digit sta on a er a MPACT Request has an overall status of APPROVED for another 3-digit sta on, the MPACT Request **WILL NOT** change but the system will automa cally generate a new MPACT Request for this new ACTIVE PACT assignment and add all sta ons that have ACTIVE PACT assignments to the Required PACT Approvers sec on of the MPACT Request.

16.1 MPACT Request Quick Summary

Below is a quick summary of a Mul ple PACT Request process. Refer to the MPACT Request Process sec on for a detailed outline of how a MPACT is approved and condi onal requirements.

1. A PCMM PACT assignment is entered on a Pa ent Profile. PCMM Web will immediately search to determine if an ACTIVE PACT assignment exists at another facility.

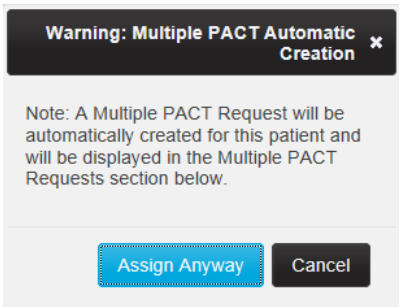
2. If there is an ac ve PACT assignment located, the MPACT request is automa cally generated and an ac onable alert is sent to the TVC at local sta on. All alerts are sent within PCMM Web. Only a TVC with the "Clinical Approval by" role and a person class of RN, NP, or PA, will be allowed to approve/deny a MPACT request.
    - **Note**: Anyone can view a MPACT request on the Pa ent Profile once it is created.
3. Local sta on TVC selects the following op ons for the MPACT Request on the Pa ent Profile: (TVC will select the Reason first, enter Comments if needed on the Request and then select to Approve or Deny)
    - Reason: Medically Necessary or Permanent Reloca on (Located towards top of request)
    - Comment: op onal (This is provided to document any other informa on the TVC wants to share regarding the request)
    - Approve or Deny – Once the Approve or Deny bu on is selected, the request expands to display the approval/denial criteria. (Located at bo om of request.)
        - Clinical Decision by: select the clinician who approved the MPACT (i.e., doctor, TVC)
        - Comments: op onal (This comment is for the approval/denial process - Required if MPACT Request is denied)
4. When the local sta on's MPACT request is approved, ac onable alerts are sent within PCMM Web to all TVC(s) at the other sta ons listed on the MPACT Request **requiring** ac on on request.
5. Receiving sta on(s) TVC selects the following op ons for the MPACT Request on the Pa ent Profile: (TVC will select to Approve or Deny)
    - Approve or Deny – Once the Approve or Deny bu on is selected, the request expands to display the approval/denial criteria. (Located at bo om of request.)
        - Clinical Decision by: select the clinician who approved the MPACT (i.e., doctor, TVC)
        - Comments: op onal (Required if MPACT Request is denied)
6. TVCs at all loca ons approve the MPACT Request.
7. Pending PACT assignment status will advance to an Ac ve PACT assignment status when a qualifying encounter is found.
8. If any of the approving sta ons deny the MPACT Request, the overall status of the MPACT Request will automa cally change to DENIED and the PENDING PACT assignment associated with the MPACT Request will automa cally be CANCELED.
    - All TVC coordinators on the request at every site except the site that denied the request will receive an alert.
    - All PCMM coordinators on request at every site except the site that denied the request will receive an alert.

9. There are three Escala on alerts that are sent regarding the MPACT Request. These escala on alerts are sent using Microso Outlook.
    - 15 day Escala on Alert – Re-send alert to TVC that has not taken ac on on the request since the first alert was sent.
    - 30 day Escala on Alert – Sent to VISN TVC no fying them that no ac on has occurred yet on the MPACT Request since the first alert was sent.
    - 45 day Escala on Alert – Sent to Na onal Coordinator no fying her that no ac on has occurred yet on the MPACT Request since the first alert was sent.

16.2 Automa c Mul ple PACT Request

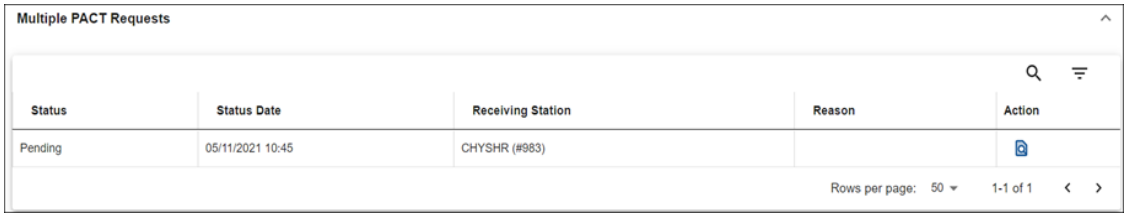
1. The Mul ple PACT request process starts when a pa ent is being assigned to a PACT team at the local sta on.
    - **Note:** Ensure to be logged into another sta on than the 3-digit sta on code of the pa ent's exis ng ACTIVE PACT team assignment(s).
2. On the *Pa ent Profile* screen, expand **Mul ple PACT Requests** sec on to view the overall Status of the request, the date the status changes, and the Receiving Sta on Name which will include the team name and focus. The Reason and Ac on columns will populate a er the local TVC approves the request.
3. In the **View Team Assignments** sec on, the user can view the exis ng PACT assignment(s) and all other team assignments which will include ACTIVE and PENDING assignments for the pa ent. The user can assign a pa ent to a local PACT team in the process of assigning a pa ent to a team.
4. Click the **Assign** bu on to display the **Team Assignment** box.
5. Select the PACT team from the **Assign to** drop-down list and click **Submit** to complete the assignment.
6. If the system finds the pa ent is ac ve at another sta on, *The Mul ple PACT Automa c Crea on* popup box will display. Click **Assign Anyway** to con nue and complete the pending assignment, or **Cancel** to cancel. The *A en on* popup box will display. Click **OK.**

Figure 130 - Warning: Mul ple PACT Automa c Crea on Message



7. The system creates a Mul ple PACT request. The *Mul ple PACT Request* sec on in the Pa ent Profile will contain a table that lists all of the requested assignments for the Primary Care teams and display the following fields:
    - Status
        - **Pending** - Default when crea ng a new request, if all involved sta ons have not approved or denied the request.
        - **Approved** - If all involved sta ons have approved the request.
        - **Denied** - If any of the involved sta ons have denied the request or
        - **Withdrawn** - If the sta on needing assignment cancelled the request
    - Status Date
    - Receiving Sta on Name
        - **Sta on Name** (Sta on #)
        - Team name
        - Focus
    - Reason
        - Medically Necessary or Permanent Reloca on
    - **Ac on** to view the request details

Figure 131 - Mul ple PACT Request sec on on the Pa ent Profile Screen



8. A confirma on message displays sta ng the pa ent was assigned successfully to the PACT team.
9. The system sends out alerts to all involved sta ons (i.e. those sta ons holding a current ac ve PACT assignment or the sta on needing assignment). An *Informa onal Alert* is sent to the sta on needing assignment PCMM Coordinator for awareness and an *Ac onable Alert* to the Sta on Needing Assignment TVC reques ng to Approve OR Deny an exis ng Mul ple PACT Request.
    - Only the facility's Travelling Veteran Coordinator (TVC) and VISN TVC (and backups) can enter the approval/denial.
    - All involved sta ons must approve or deny the new pending request in order for the PACT assignment at the reques ng sta on to be considered for ac va on.

10. The authorized user (TVC) opens the **Alerts** list (*see the* View Open Alerts List for a Current Sta on *sec on*), locates the correla ng Ac onable alert for the request, and clicks the **View/Ac on on Alerts** icon in the **Ac ons** column. The system will display the *Pa ent Profile* screen.

Figure 132 - A MPACT Request for a Pa ent Alert

	Type	Description	Team	Patient	Creation Date/Time	Recipient(S)	Sender	Actions
>	Informational	MPACT CREATED and awaiting approvals due to request for patient "PROG, TWOTEST" for a Primary Care team assignment at station "DAYSHR (#984)".		PROG, TWOTEST	09/10/2021 11:50	User Park, [redacted]	System	

11. Navigate to the Pa ent Profile.
12. On the *Pa ent Profile* screen, the PACT team assignment is now displayed in the **View Team Assignments** sec on. The Status is PENDING and depends on **two requirements before the assignment turns to ACTIVE**. The system will validate that each requirement has been met **before** the PACT assignment turns ACTIVE. An encounter date alone will NOT change a PENDING PACT assignment associated with a Mul PACT Request.
    - **Requirement 1** – The pa ent must have a valid encounter date with a qualifying member of this team within the last 60 days.
    - **Requirement 2** - The overall Status of the MPACT must be **approved**. The overall status is displayed on the pa ent's profile in the **Mul ple PACT Requests** sec on in the Status column. The MPACT Request will remain in PENDING status un l **ALL** approvers listed in the Required PACT Approver table of the MPACT Request have provided an approval.
13. The **Mul ple PACT Requests** sec on on the Pa ent Profile has been populated with the newly generated MPACT informa on. The following displays
    - Status for the Request
        - Pending (default when genera ng a new request and overall status if all involved sta ons have not yet approved or denied the request)
        - Approved (If **all** involved sta ons have approved the request)
        - Denied (If **one** of the involved sta ons have denied the request)
        - Canceled (If the sta on needing assignment cancelled the request)
    - Status Date
        - As the MPACT request receives approvals/denials from other sta ons, the overall Status and Status Date will be automa cally updated to reflect new Status/Status Date.
    - Receiving Sta on Name
        - Sta on Name (Sta on#), Team name, Focus
    - Reason (only populates a er the local TVC selects it and approves the request locally)
        - Medically Necessary

- Permanent Reloca on

- Ac on to view the request details

16.3 Approving Mul ple PACT Request

1. Click the **Ac ons** icon (magnifying glass) to display the *Create or Edit Mul ple PACT Request* screen. This screen will display:

   - The Mul PACT Request form will auto-populate and display the overall status of the request in the **Status of the Request** field. This will be Pending un l all approvals are received.
   - Request Entered On - (user that generated the request)
   - Sta on Receiving Request – (sta on that generated the pending PACT assignment request)
   - TVC's listed for that sta on – (Sta on Name and Sta on Number)
     - This sec on will list the TVCs assigned to the selected sta on and will automa cally populate users holding the "Traveling Veteran Coordinator" role (TVC) at the sta on. The TVC Phone and Email icon will display, if available.
   - Reason for Mul ple PACT Request (Medically Necessary or Permanent Reloca on)
   - Comments – (TVC may enter any addi onal comments, if needed.)
   - The *Required PACT Approvals* sec on will include:
     - Sta on - This column will display all sta on names and numbers that have an ACTIVE PACT assignment and these sta ons will receive the Mul PACT ac onable alert reques ng approval/denial.
     - TVCs – This column will display all available TVCs for each sta on listed. It will display the TVC(s) name, phone number, and email address, if available.
     - Status:
       - Pending
       - Approved
       - Denied
       - Withdrawn
       - Not Yet Submi ed for Approval – Once a request is first submi ed during the pa ent team assignment process, all other sta ons listed on the request form will display a Status of *Not Yet Submi ed for Approval* to indicate the Mul ple PACT Request has not been sent to the other sta ons for approval/denial. The Receiving Sta on TVC must approve or deny and select a reason before other sta ons are no fied. Once the local TVC approves the request, the status will change for the local sta on to *APPROVED* and display as *PENDING* for all other

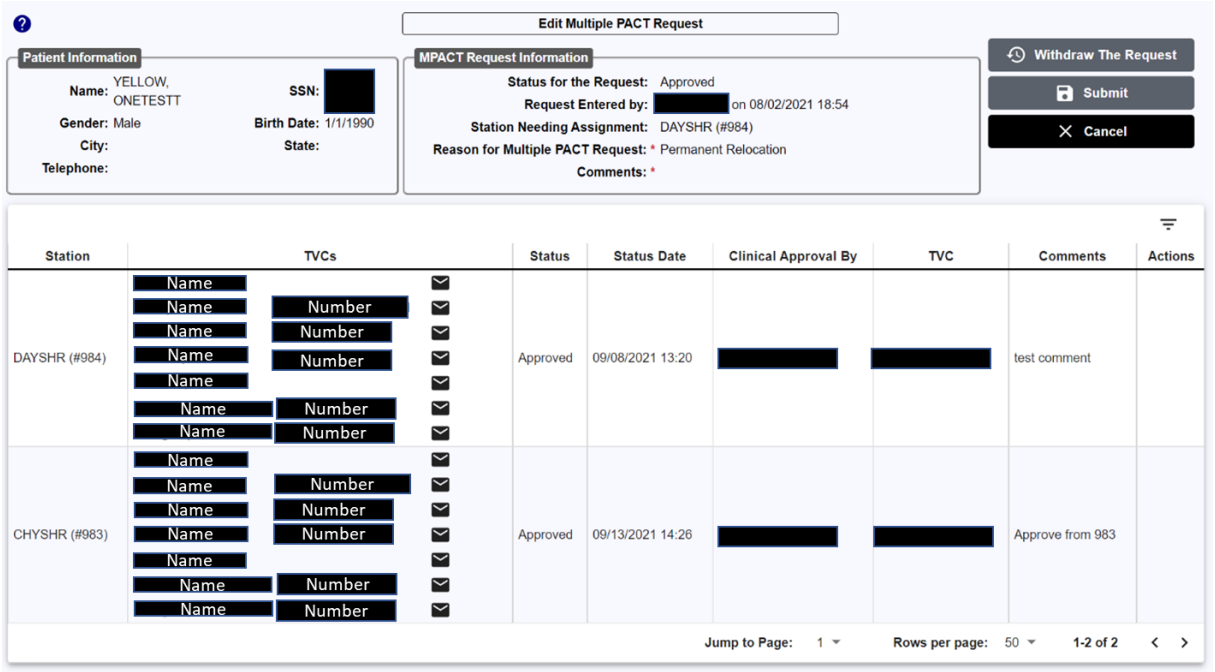
sta ons listed on this request. Once all sta ons have approved this request, the Status column for all sta ons will display *APPROVED.*

- Status Date – This will display a date and me any ac on was taken for an exis ng PENDING Mul ple PACT Request.
- Clinical Approval By
- Traveling Coordinator
- Comments (if any)
- Ac ons - Resend Alerts (Only available for Sta on Needing Assignment)

- Reason for Mul ple PACT Request (Medically Necessary or Permanent Reloca on)
- Comments – (TVC may enter any addi onal comments, if needed.)

2. Select the appropriate reason from the **Reason for Mul ple PACT Request** drop-down field.
3. Enter any addi onal informa on or comments in the **Comments** field. This is op onal, but helps to communicate between TVCs.

Figure 133 - Create or Edit Mul ple PACT Request Screen

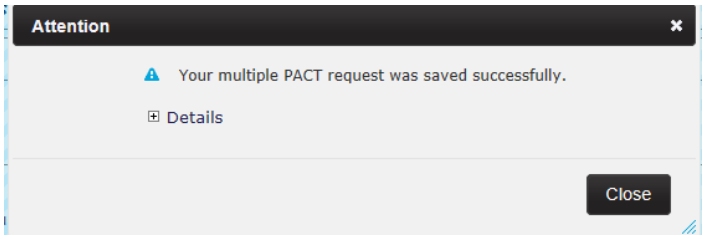


4. Click **Approve** to con nue, or **Deny** to deny the requested approval. The status will be changed to *Approve*. The **Entered by** will be populated. The Approver selects an op on from the **Clinical Decision by:** drop-down field, and comments may be entered.
5. Click **Submit** to con nue, **Withdraw the Request** to withdraw, or **Cancel** to cancel the request. If submi ed, the system changes the Status to **Approved** in the Pa ent Profile and sends an alert to the original sta on.

- If the TVC denies the request, the pending PACT assignment request will be cancelled and closed with a reason of *Denied*.
- If the Mul PACT Request is *Pending*, ONLY the Sta on Needing assignment TVC role can WITHDRAW the request. This will send an Informa onal alert to all sta on(s) TVC(s) and PCMM Coordinator(s) listed on the request, sta ng the request is no longer needed. The sta on needing the assignment can cancel the request as long as the overall status of the MPACT request is *Pending*. Even if the sta on needing assignment has approved the Mul PACT request that sta on can s ll cancel the request if its overall status is s ll *Pending*.
- If another sta on has a pending assignment that flips to *Ac ve* while a Mul PACT request s ll has an overall status of *Pending*, this sta on will be added to the Mul PACT request as a *Required PACT Approver*. The appropriate alerts will be sent to the appropriate staff members.
- Once the overall status of a Mul PACT request changes from *Pending* to *Approved* or *Denied*, the request will be closed and no further changes are permi ed.

6. A confirma on message displays. Click **Close.**

Figure 134 - Your Mul ple PACT Request was Saved Successfully A en on Message



7. Upon the TVC closing the Confirma on message, the system performs the following ac ons:
   - Updates the MPACT Request on the Pa ent Profile.
   - Displays the Status of the MPACT Request as PENDING since all other sta ons involved have not submi ed approvals.
   - Updates the **Status Date** column to reflect the date and me the Sta on approved the request.
   - Displays the reason selected by the TVC for this request in the **Reason** column.
   - Sends Ac onable alerts to all TVC(s) at the other sta ons listed on the MPACT Request in the 'Required PACT Approvals' sec on **requiring** ac on on this request.

16.4 Approve Sta on Process

1. The TVC at the receiving sta on opens the **Alerts** list, locates the correla ng *Ac onable* alert for the request, and clicks the **View/Ac on on Alerts** icon in the **Ac ons** column. The system will display the *Pa ent Profile* screen.

Figure 135 - Mul ple Pact Approval Alert

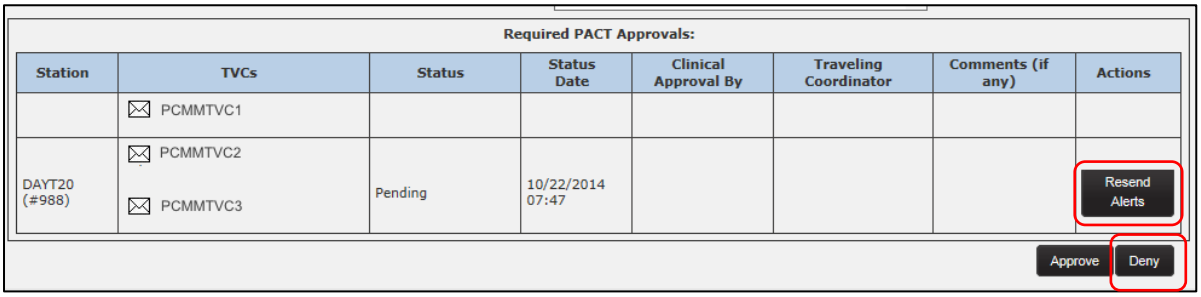
	Type	Description	Team	Patient	Creation Date/Time	Recipient(S)	Sender	Actions
>	Informational	MPACT CREATED and awaiting approvals due to request for patient "PROG, TWOTEST" for a Primary Care team assignment at station "DAYSHR (#984)".		PROG, TWOTEST	09/10/2021 11:50	[redacted]	System	

2. The TVC opens the **Mul ple PACT Requests** sec on and clicks the icon in the **Ac on** column for the corresponding record to display the *Mul ple PACT Automa c Crea on* box.

Figure 136 - Mul ple Pact Requests with a Pending Status

3. The TVC scrolls down to the **Required PACT Approvals** sec on.
4. The TVC has the op on of resending the alert to the sta ons listed by clicking the **Resend Alert** bu on in the Ac ons column.
5. The TVC clicks **Approve** to con nue (and may enter comments if desired), **Deny** to suspend the approval process. If **Deny** is selected, the TVC will be required to select a **Reason** and **Date**.
   - All involved sta ons must approve or deny the new pending request in order for the PACT assignment at the sta on to be considered for ac va on.
   - Once a request has been approved or denied – no further edits are permi ed.
   - The other involved sta ons cannot edit any data. Sta ons can only approve or deny the request.
   - The TVC(s) must enter who made the clinical decision to Approve or Deny the request. This indicates if the TVC is approving the request or on behalf of someone else who authorized the approval. This drop-down list will include all PCMM Web users who hold the *clinical approver* permission and is required.

Figure 137 - Approving a MPACT on the Required Pact Approvals Sec on



6. The TVC clicks **Submit** and the record is saved.
7. The request will be saved with an assignment status of *Approved* for the sta on approving the request. The overall status of the request will remain *Pending* un l all required approvals have been

obtained. An Informa onal Alert will be sent to all TVC(s) at the other approving sta on(s) except the TVC's sta on that just provided the approval.

- If the MPACT request is approved by all involved sta ons being asked to approve/deny the request, the status of the en re request will then be *Approved*. An informa on alert will be sent to all TVC(s) and PCMM Coordinators.

16.5 TVC Denial of Request

- The request will be saved with an assignment status of *Denied.* An Informa onal Alert will be sent to all TVC(s) and PCMM Coordinator(s) at the other approving sta on(s) except the TVC's and PCMM Coordinator's sta on that just provided the denial.
- If the MPACT request is denied by one sta on within all the sta ons being asked to approve/deny the request, the status of the en re request will then be *Denied*. No further ac on on this request will be possible by any other approvers whose approval may be pending.

1. The system displays the details of the submi ed request in the meline on the *Pa ent Profile* screen.

- The system will track that all approvals needed are received. When they are, the assignment will be interrogated for ac va on. If a qualifying encounter has been recorded within the previous 60 days from the team assignment date; the assignment status will be changed from *Pending* to *Ac ve* using the encounter date as the effec ve date for the ac va on.
- Once a MPACT Request is approved and in *Approved* status, it will be considered valid for 24 months using the Approval date from the last sta on to submit its approval on the request. If the pa ent is unassigned from that team and is re-assigned again or if the team itself is inac vated/re-ac vated in this me period, the earlier approval will be considered 'valid' during this 24 month period.
    - If the 24 month meframe has passed and a pa ent is then unassigned from the team, a new MPACT Request is required.
    - If the 24 month meframe has passed and the pa ent is s ll assigned to the team, the original MPACT Request is s ll considered valid.
- If a MPACT Request is s ll Pending 15 days a er the request's crea on, the system will automa cally generate an informa onal alert to all of the outstanding sta on approver(s) by sending an Outlook email to remind the recipient(s) to look at the PCMM Web Alerts and that ac on is needed.
    - If a MPACT Request is s ll Pending 30 days a er the request's crea on, the system will generate an informa onal Escala on Alert to the VISN TVC coordinator of each sta on that has not responded to the MPACT Request by sending an Outlook email sta ng that a MPACT Request has been pending for 30 days and to look at the PCMM Web Alerts to take ac on on this request.

- If a MPACT Request is s ll Pending 45 days a er the request's crea on, the system will generate an informa onal Escala on Alert to the PCMM Web Na onal Coordinator by sending an Outlook email sta ng that a MPACT request has been pending for 45 days and to look at the PCMM Web Alerts to take ac on on this request.

- If a date of death (DOD) occurs for a pa ent in the sta on needing assignment while a Mul PACT Request is in Pending status, the system will automa cally unassign the pa ent from the pending assignment and the Mul PACT Request will be WITHDRAWN. An informa on alert will be sent to all appropriate people.
  - If the Mul PACT Request already has a status of APPROVED or DENIED or WITHDRAWN, no changes will occur to those requests.
  - If a DOD occurs for the pa ent at one of the approving sta ons, the Mul PACT Request will not be affected. (The auto inac va on process of the ac ve assignment at the other sta on will resolve this issue.)

17 Required PACT Approvals Sta on(s) Process

All other involved sta ons listed in the Required PACT Approvals sec on **must** approve or deny the new pending request in order for the PENDING PACT assignment at the Sta on Needing Assignment to be considered for ac va on. These involved sta ons **will not** be able to edit any data, they will only be able to approve or deny the request.

Each TVC at all other sta ons listed in the Required PACT Approvals sec on of the MPACT Request will review the Ac onable alert reques ng approval of a MPACT Request for a new PACT assignment for the pa ent.

1. Navigate to the Pa ent Profile.
2. In the **Mul ple PACT Requests**, click the **Ac ons** icon (magnifying glass) to display the *Create or Edit Mul ple PACT Request* popup screen.
3. Navigate to the bo om of the request to access the Approve or Deny bu ons.
   - **Note:** The WITHDRAW bu on is no longer displayed since **ONLY** the Sta on Needing Assignment can WITHDRAW a request.
4. Click Approve.
5. The system automa cally displays the Request Status and Entered By for this ac on.
6. The status will be changed to Approve. The Approver selects a Clinical Decision by:, and comments may be entered if desired.
7. Click **Submit**.
8. A Confirma on message is displayed and the Pa ent Profile is displayed.
9. That status of the MPACT has changed to APPROVED in the Mul ple PACT Request sec on.

10. The system performs the following ac ons:
    - Updates the MPACT Request on the Pa ent Profile:
        - Displays status as APPROVED since all sta ons involved have provided the necessary approvals.
        - Updates the date and me the MPACT request was approved **Status Date** column.
        - Displays the reason for the MPACT request in the **Reason** column.
    - Sends an Informa onal alert sta ng this sta on has just approved the request to all other sta ons on the MPACT Request except the sta on that that approved it. Since there is no limit as to how many ACTIVE PACT assignments a pa ent can have with an APPROVED MPACT Request for each PACT assignment, there could be several sta ons listed as approving sta ons on the request. This Informa onal alert will be sent each me a sta on approves un l all approvals are received from all sta ons involved on the request.
    - Sends Informa onal alerts to all TVC(s) and PCMM Coordinator(s) at all sta ons involved with the request sta ng that all approvals have been received and the MPACT Request has been approved.

The PENDING PACT assignment associated with this APPROVED MPACT Request is s ll in PENDING status. Even with an APPROVED MPACT Request, the assignment will not flip to ACTIVE un l a valid encounter with a qualifying member of the team the pa ent is assigned is detected by the system.

11. The TVC at the original sta on the request was submi ed can view the PENDING PACT assignment on the *Pa ent Profile* screen.
    - **Note**: The pa ent could have already had an encounter with a qualifying member and the PENDING PACT assignment would have flipped simultaneously to ACTIVE when the overall Status on the MPACT Request changed to APPROVED.
12. The pa ent's PENDING PACT assignment is now ACTIVE a er the system verified the two requirements needed to flip this PACT assignment to ACTIVE. Those requirements are:
    - An overall APPROVED MPACT Request
    - A valid encounter with a qualifying member
13. When the PACT assignment flips from PENDING to ACTIVE, the **Start Date and me** will update to reflect the date of the encounter which is the date the team assignment starts as ACTIVE. Unless the pa ent has historical PACT assignments, the START DATE will not overlap the END DATE of a recent historical PACT assignment.
14. The MPACT Request process is to allow a pa ent's mul ple PACT assignments throughout the enterprise has been completed successfully.

17.1 Permanent Reloca on Process

- If the TVCat the sta on needing assignment selects **Permanent Reloca on** as the reason for the Mul PACT Request, it is to assist the pa ent with an easy transi on to the pa ent's new sta on. Once overall approval is received by the sta on needing assignment, the following alerts will be sent:
    - An informa onal alert will be sent to all TVC(s) on the request sta ng the reloca on has completed and the request has been WITHDRAWN.
    - An ac onable alert will be sent to all PCMM Coordinator(s) on the request sta ng the reloca on has completed; that all Ac ve PACT assignments need to be unassigned at each of the approving sta on(s); and the request has been WITHDRAWN.

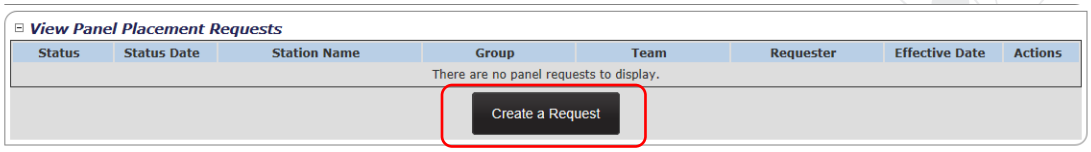
17.2 PACT Panel Placement

The PACT Panel Placement is used as a communica on tool for coordinators within the same 3-digit sta on codes to assist with the transi on of teams within the same facility or between facili es and coordinate a change in the a pa ent's PACT team.

This request is used for communica on purposes only for the user to facility informa on regarding the pa ent's PACT team assignment and must be used within the same 3-digit code sta on. There can be mul ple requests for the same pa ent for different divisions at one me. The pa ent must have an ac ve PACT team assignment at one sta on before this func on can be performed.

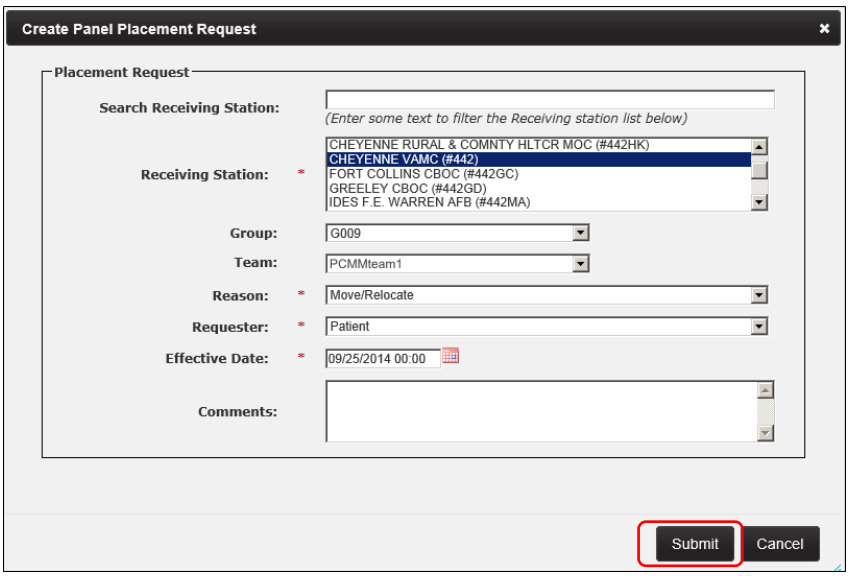
1. Expand the **View Panel Placement Requests** sec on from the *Pa ent Profile* screen.
2. The following columns will display:
    - Status
    - Status Date
    - Sta on Name
    - Group
    - Team
    - Requester
    - Effec ve Date
    - Ac ons
3. To create a PACT Panel Placement request, click the **Create a Request** bu on. The **Create Panel Placement Request** popup box will display.

Figure 138 - View Panel Placements Request with the Create a Request Bu on Selected



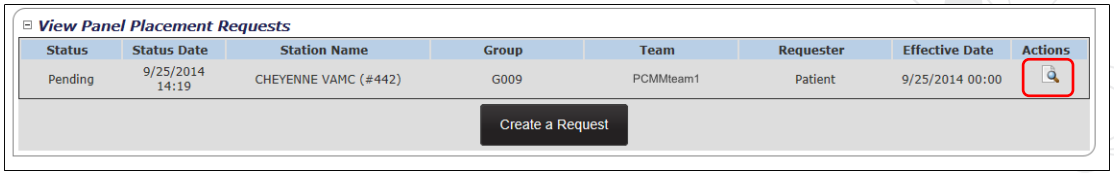
4. Enter some text to filter to search for a sta on in the **Search Receiving Sta on** text field.
5. Select the sta on in the **Receiving Sta on** drop-down list. (required)
6. Select the group number in the **Group** drop-down list.
7. Select the team for the panel placement request in the **Team** drop-down list.
8. Select a reason for the panel placement request in the **Reason** drop-down list. (required)
9. Select the type of requester in the **Requester** drop-down list. (required)
10. Select the calendar icon next to the **Effec ve Date** field to change the current date and me. Past dates are not allowed.
11. Add any addi onal informa on in the **Comments** text field.
12. Click **Submit**. The *A en on* popup box will display with a success message. Click **Close.**

Figure 139 - Create Panel Placement Request Screen



13. The record will appear in the **View Panel Placement Requests** sec on with a status of *Pending*.
14. A user can edit the request while s ll in a Pending status by clicking the icon in the **Ac ons** column. The *Edit Panel Placement Request* popup box will display. Edit fields, if desired.

Figure 140 – Edit a Request from the View Panel Placement Requests Sec on



15. Click **Submit.** The A en on popup box will display with a success message. Click **Close.**
16. An alert will be sent to the user of the site that generated the request and the user of the site that is listed on the request sta ng that a request was created. This alert will be sent from the system to each recipient each me a PACT Panel Placement Request is created or when the Team or Sta on on the request is updated.
17. The **View Panel Placement Request** sec on is populated on the Pa ent Profile. The Panel Placement Request can be updated by clicking icon the **Ac ons** column. New alerts are sent only when upda ng the group or team for the request. This will trigger new alerts to both facili es. **Only** updates to the team or group will trigger a new alert.
    - *Move/Relocate* request: if the record contains a Move/Relocate reason for the request, the system will automa cally unassign the pa ent from the ac ve team assignment at the first sta on and creates the Pending assignment at the new sta on when an encounter date occurs for the Pending assignment at the new sta on.

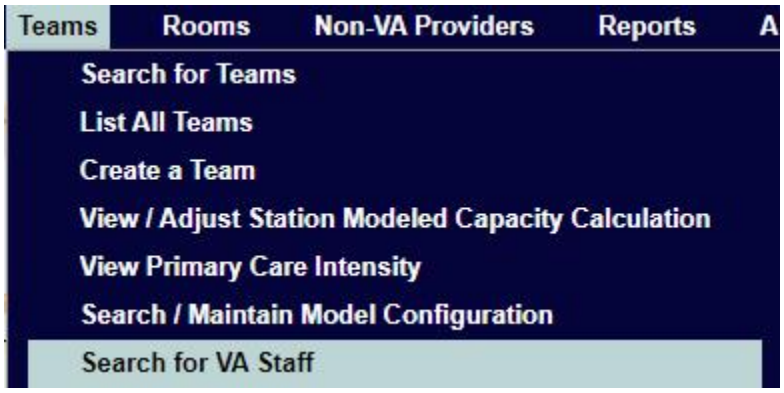
18 Staff Management

18.1 Search for VA Staff

A user can quickly search for a VA staff member using the menu op on.

1. Select **Staff** > **Search for VA Staff** from the main menu to display the *Search for Staff* window.

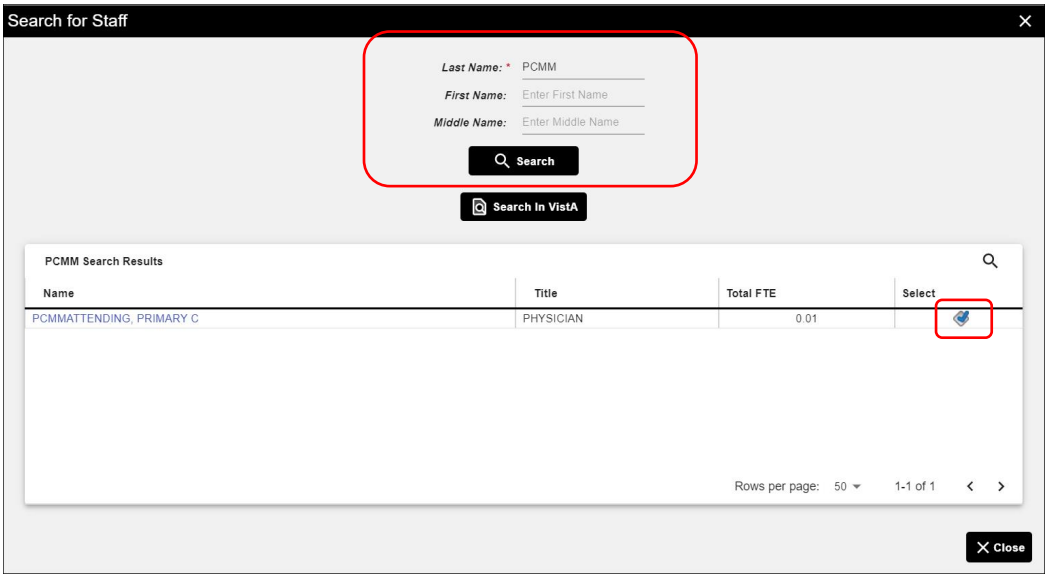
Figure 141 - Search for VA Staff Menu Op on Selected to Manage VA Staff



2. Enter at least two characters of a last name for the staff member. Entering first or middle names will narrow the search.
    - A terminated staff member is shown as “Separated” in the search results.
    - Total FTE column includes the sum of team assignments associated with the staff member.

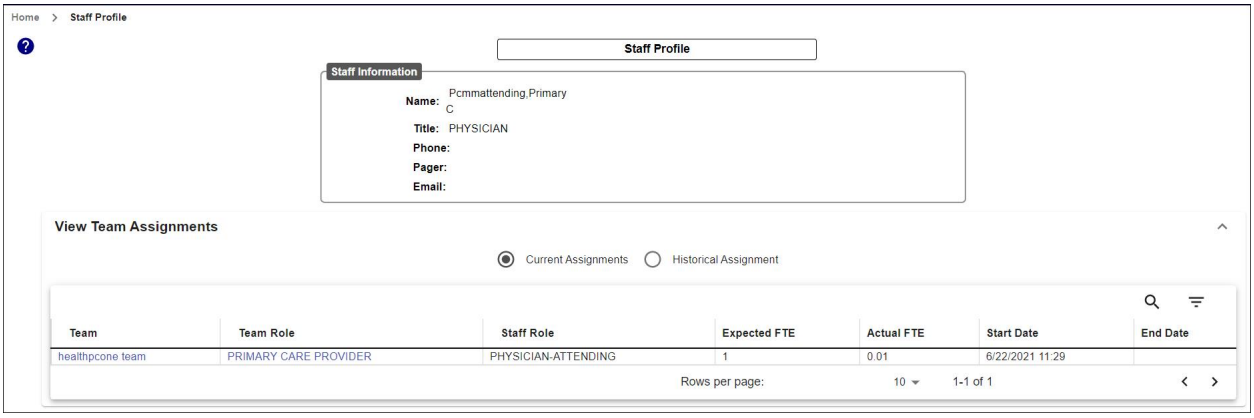
3. Enter the Last Name with the First Ini al of the First Name up to the FULL First Name of the staff member to narrow the search results. (E.g. Smith,J or Smith,Jo or Smith,Jones)
4. Click **Search** to display a list of staff names results.
5. Click the icon in the **Select** column to view the staff member's profile. The *Staff Profile* screen will display.

Figure 142 - Search for Staff Box to Manage VA Staff



6. The following informa on displays on the Staff Profile screen:
   - Name, Title, Phone, Pager, and Email.
   - If the Staff Member has an email, click the email icon to email the VA staff member.
   - Expand the **View Team Assignment** toggle link to view a list of team assignments.
   - Click on a **team name** link. The *Modify an Exis ng Team* page will display and the user has the op on to modify fields and op ons.

Figure 143 - Modifying a Staff Member on the Staff Profile Screen



If the system cannot find a staff member:

- If the system cannot find a record, a message will display in the *Search for Staff* window. Click the **Find in VistA** bu on for Vista mapped sta on or **Find in Cerner** bu on for Cerner mapped sta on to search for the staff member in VistA/Cerner that is not listed in the PCMM Web Search results list. VistA requires at least two le ers of the last name to perform a search. Enter the search criteria and select the **Find in VistA** or **Find in Cerner** bu on.
- Enter the Last Name with the First Ini al of the First Name up to the FULL First Name of the staff member with no space a er the comma to narrow the search results. (E.g. Smith,J or Smith,Jo or Smith,Jones)
- The PCMM Web VistA staff search will now display all staff members with the same last name in the search for staff results table even if the SSN field is blank in VistA.
- The screen will refresh with the VistA results display. Click the icon in the **Select** column that corresponds to view the staff member's profile.

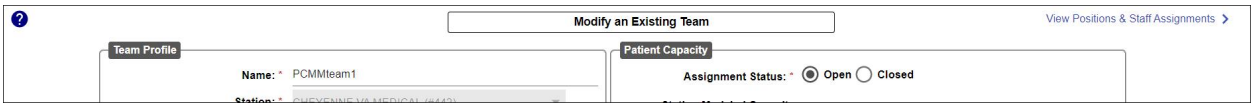
18.2 Remove or Unassign Staff from a Team Role (Posi on)

A user can remove staff from a team role from the *Posi on List* screen. The associated team must have an ac ve status.

18.3 From the Team List screen

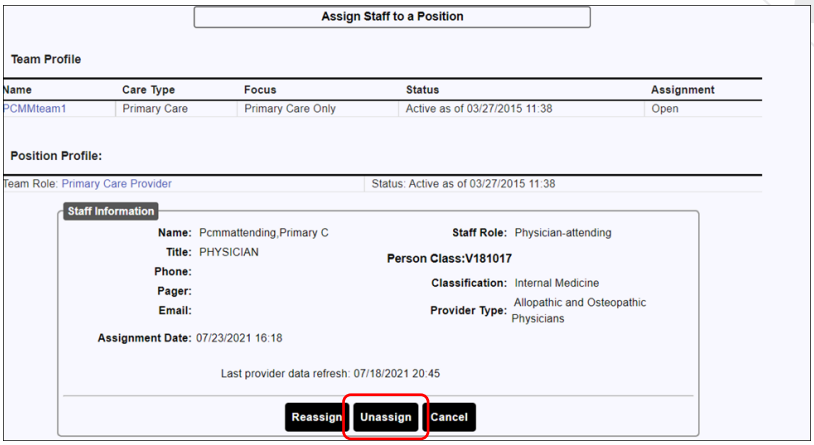
1. From the main menu, click **Teams** > **List All Teams** or **Teams** > **Search for a Team**. Click on the **team name** link.
2. From the *Modify an Exis ng Team* screen, click **View Posi ons and Staff Assignments**. The *Posi on List* page will display.

Figure 144 - View Posi ons and Staff Assignments Link Selected to Remove or Unassign a Staff from a Team Role



3. Alterna vely, from the *Posi on List* page, click the icon in the **Ac ons** column.
4. Click the **Manage Staff** bu on in the *Current Staff Assignments* sec on.
5. Click the name link in the **Staff Name** column to display the *Staff Informa on* page.
6. Click the **Unassign** bu on to remove the staff member name and profile from the team role.

Figure 145 – Unassigning a Staff from a Team Role



7. A box will display, indica ng whether to unassign the staff member. Click **Close** to close the message. The *Staff Informa on* screen displays.

Figure 146 - Confirma on of Unassignment of Staff from the Team Role Message

8. Click the calendar icon next to **Unassignment Date** field to change the unassignment date (current date and me is displayed by default).
9. Choose an **Unassignment Reason** from the drop-down list.
10. Click the **Submit** bu on to confirm the unassignment, or **Cancel** to cancel.
11. When the unassignment occurs, the unassignment date/status/reason will be captured in History with who requested the change and when.
    - **Note:** If the team role is a preceptee that has a preceptor assigned, the team role may not be de-staffed un l the preceptor rela onship is terminated. A user will be presented with a message indica ng the team role has a preceptee and cannot be de-staffed without first unassigning the preceptee.

18.4 Reassign or Modify Staff Assignment

A user can reassign or change staff assignments from the *Posi on List* screen. The associated team must have an ac ve status.

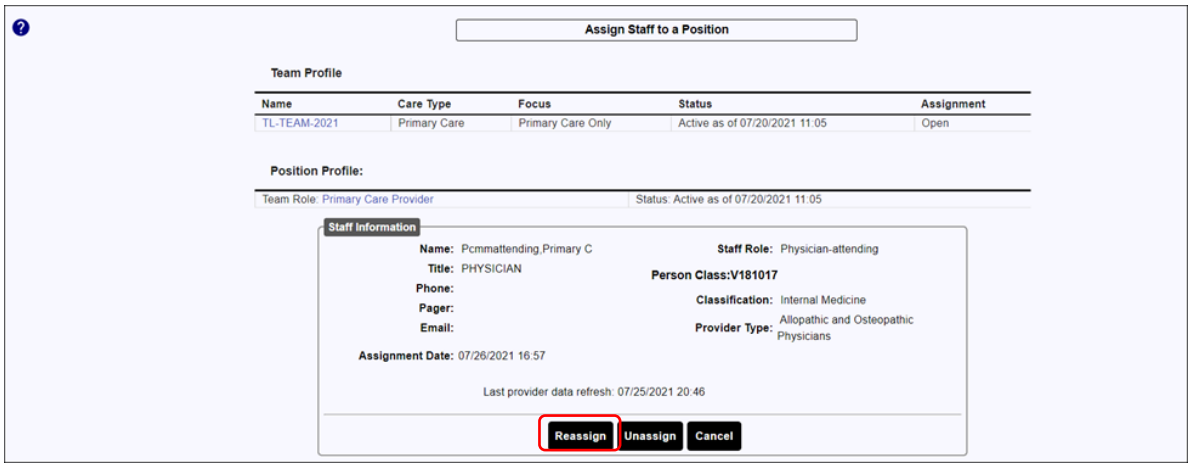
18.4.1From the Team List screen

1. From the main menu, click **Teams** > **List All Teams**.
2. Click the icon in the **Posi on** column for the desired team to display the *Posi ons List* page. The team must be ac ve.

18.4.2From the Modify an Exis ng Team screen

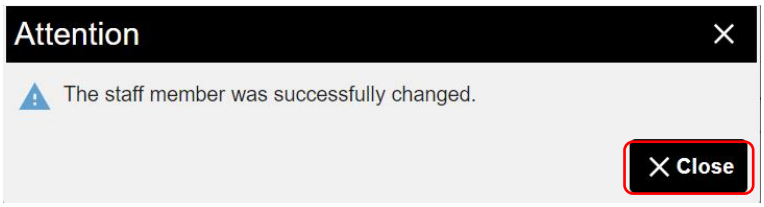
1. From the main menu, click **Teams** > **Search for a Team**. Click on the **team name** link.
2. From the *Modify an Exis ng Team* screen, click **View Posi ons and Staff Assignments**. The *Posi on List* page will display. Alterna vely, from the *Posi on List* page, a user can click the icon in the **Ac ons** column.
3. Click the **Manage Staff** bu on in the Current Staff Assignments sec on.
4. Click a name link in the **Staff Name** column to display the *Staff Informa on* page.
5. Click the **Reassign** bu on. A Confirma on dialog box displays to confirm the reassignment of the staff member. Click **Confirm** to con nue and display the *Search for Staff* dialog box or **Cancel** to exit.

Figure 147 - Reassigning a Staff Member from the Assign Staff to a Posi on Screen



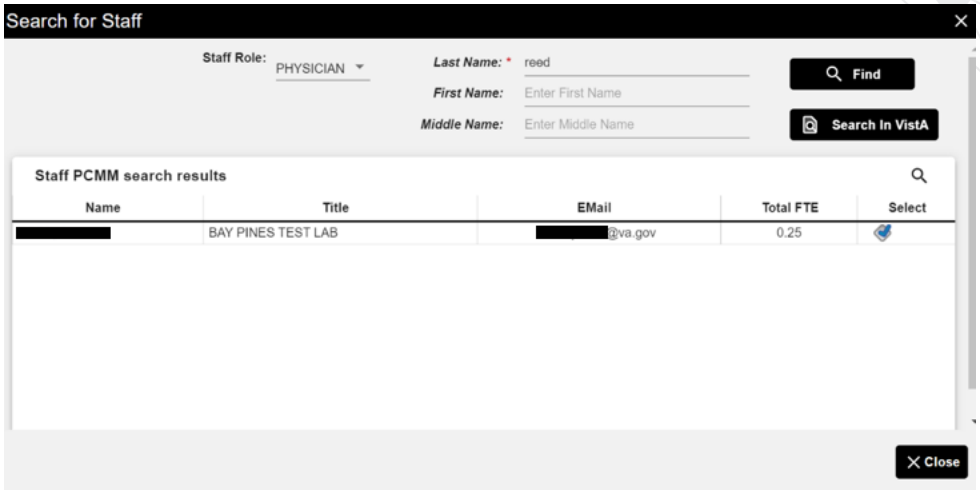
6. A box will display, indica ng whether to unassign the staff member. Click **Close** to close the message. The *Staff Informa on* screen displays.

Figure 148 - Reassignment Confirma on Message



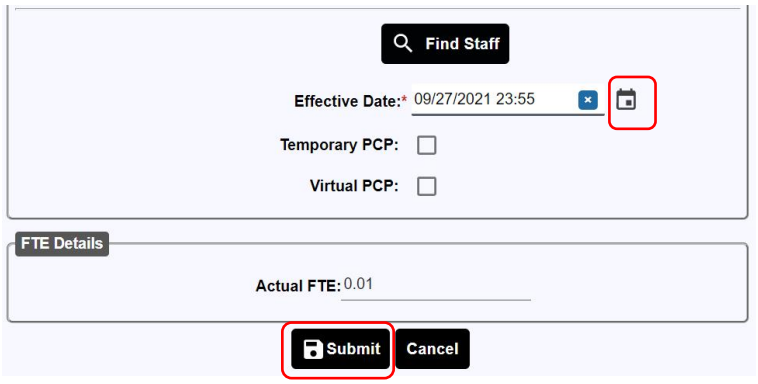
7. Enter at least two characters of a last name for the staff member. Entering first or middle names will narrow the search. Click **Search**. If the system cannot find the staff member, click the **Search VistA** bu on for Vista mapped sta on of **Search Cerner** for Cerner mapped sta on.
8. Click the icon in the **Select** column. The *Staff Informa on* dialog box will display. A user can start the search process again to choose another staff member. Click the **Search Staff** bu on to proceed with this process.

Figure 149 - Searching for Staff Member on the Search for Staff Box



9. Click the calendar icon next to the **Effec ve Date** field (current date and me is displayed by default).
10. Enter the **FTE** (current FTE is displayed by default).
11. Click the **Submit** bu on to confirm the reassignment, or **Cancel** to cancel. The *Modify an Exis ng Posi on* screen will display and the new Current Staff member's informa on will display.

Figure 150 – Defining the Effec ve Date for the Reassignment



12. When the reassignment occurs, the reassignment date/status/reason will be captured in History with who requested the change and when.
    - **Note:** If the team role is a preceptee that has a preceptor assigned, the team role may not be de-staffed un l the preceptor rela onship is terminated. A user will be presented with a message to indicate the team role has a preceptee and cannot be de-staffed without first unassigning the preceptee.

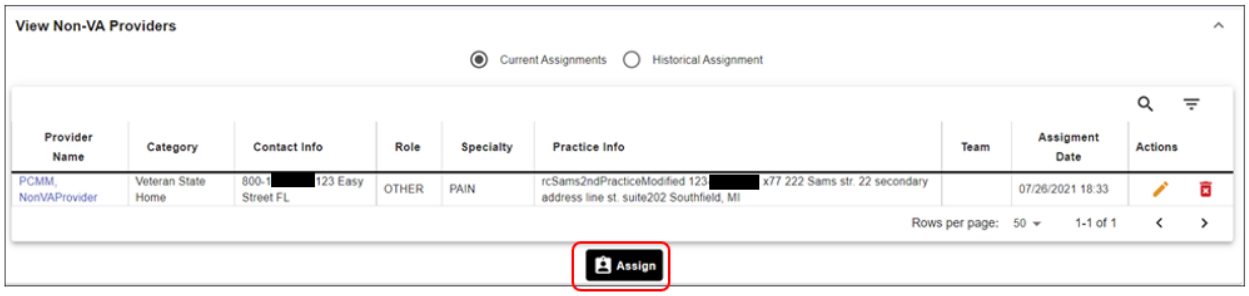
19 Create a Non-VA Provider

A user can create a Non-VA Provider that provides Non-VA Care to the pa ent through the VA. Non-VA Care consists of three categories: Veteran's Choice, Community Nursing Home, and Veteran State Home.

A user can create a new Non-VA Provider from the *Pa ent Profile* screen.

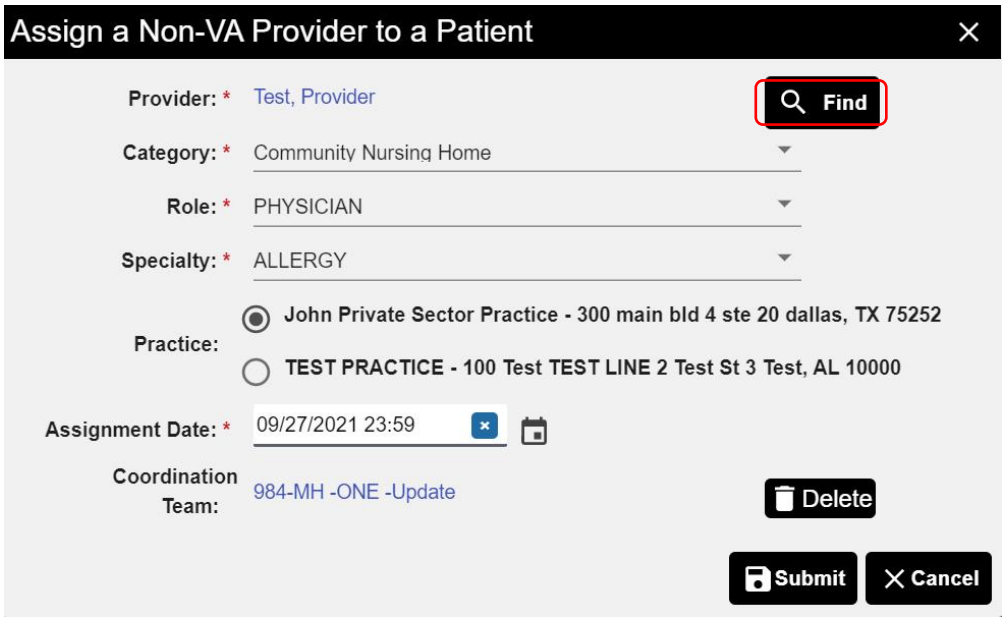
1. Expand the **View Non-VA Providers** sec on on a *Pa ent Profile* screen and click the **Assign** bu on to display the *Assign a Non-VA Provider to a Pa ent* screen.

Figure 151 - View Non-VA Providers Sec on with the Assign Bu on Selected



2. Click the **Find** bu on next to **Provider** to display the *Search for Non-VA Provider* screen.

Figure 152 - Searching for a Provider

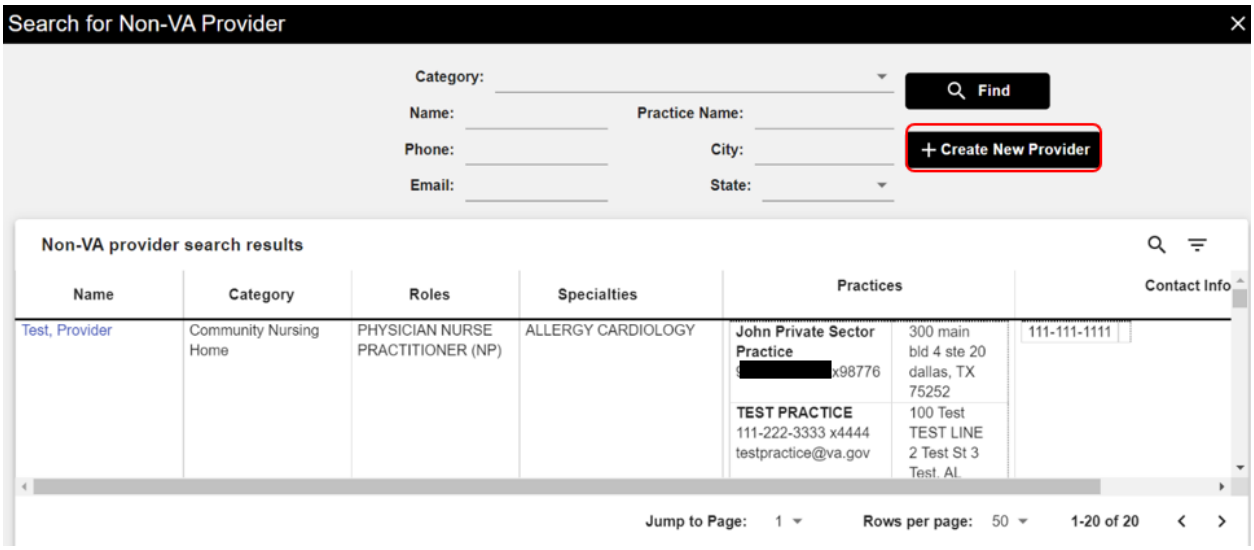


» *User must first search for a Non-VA Provider before one can be created.*

3. Enter the search criteria and click the **Find** bu on. If the Non-VA Provider is not found in the system or if the necessary provider is not listed, the **Create New Provider** bu on displays. Click the **Create New Provider** bu on to display the *Assign a Non-VA Provider to a Pa ent* screen.

- **Note:** Only a er clicking the **Find** bu on, will the **Create New Provider** bu on display. This enables a user to verify first, if the Non-Provider exists before a new one is entered in the system.

Figure 153 - Search for Non-VA Provider Screen with the Create New Provider Bu on Selected



4. The **Find** bu on displays to allow the user to search for a Non-VA Provider during the crea on process.
5. Select the Non-VA Category type from the **Category** drop-down. Op ons are:
   - Community Nursing Home
   - DoD
   - Private Sector
   - Veteran State Home
   - Veteran's Choice

19.1 Name Sec on

1. Enter the last name of the Non-VA Provider in the **Last Name** text box.
2. Enter the first name of the Non-VA Provider in the **First Name** text box.
3. Enter the middle name of the Non-VA Provider in the **Middle** text box.
4. Enter the suffix of the Non-VA Provider in the **Suffix** text box.

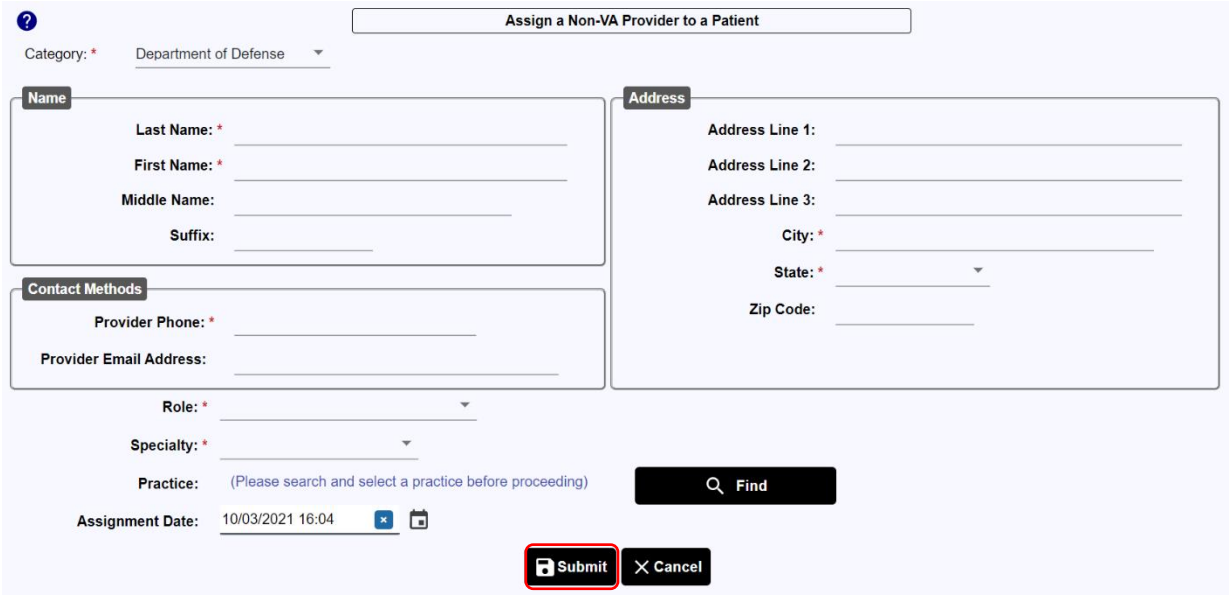
19.2 Address sec on

- Note: only displays for the DoD Category

1. Enter the address of the Non-VA Provider in the **Address Line 1**, **Line 2**, and **Line 3** text box(es).
2. Enter the city where the Non-VA Provider resides in the **City** text box.

3. Select the state where the Non-VA Provider resides in the **State** drop-down.
4. Enter the Zip Code where the Non-VA Provider resides in the **Zip** text box.
5. Select a role from the **Role** drop-down list (required) and select a specialty from the **Specialty** drop-down list.
6. Click the **Search** bu on to create or assign a Non-VA Prac ce to a Non-VA Provider. Click the **name link** to assign a Non-VA Prac ce.
7. Select the calendar icon to indicate the assignment date.
8. Click the **Search** bu on to assign a Coordina on Team. This op on available for all Non-VA Provider Categories expect for DoD.
9. Click **Submit** to save the informa on and display the Non-VA Provider Informa on screen. The new provider will be listed. Or click Cancel to display a dialog box that asks to confirm the cancela on and warns that no informa on will be saved.

Figure 154 - Assign a Non-VA Provider to a Pa ent Screen

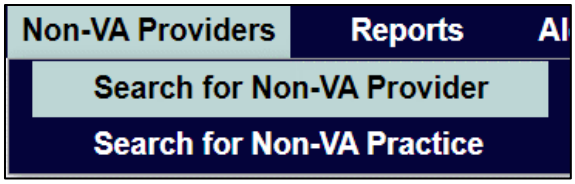


19.3 Search for a Non-VA Provider

A user can search for a Non-VA Provider in the PCMM Web system in order to view and update provider informa on.

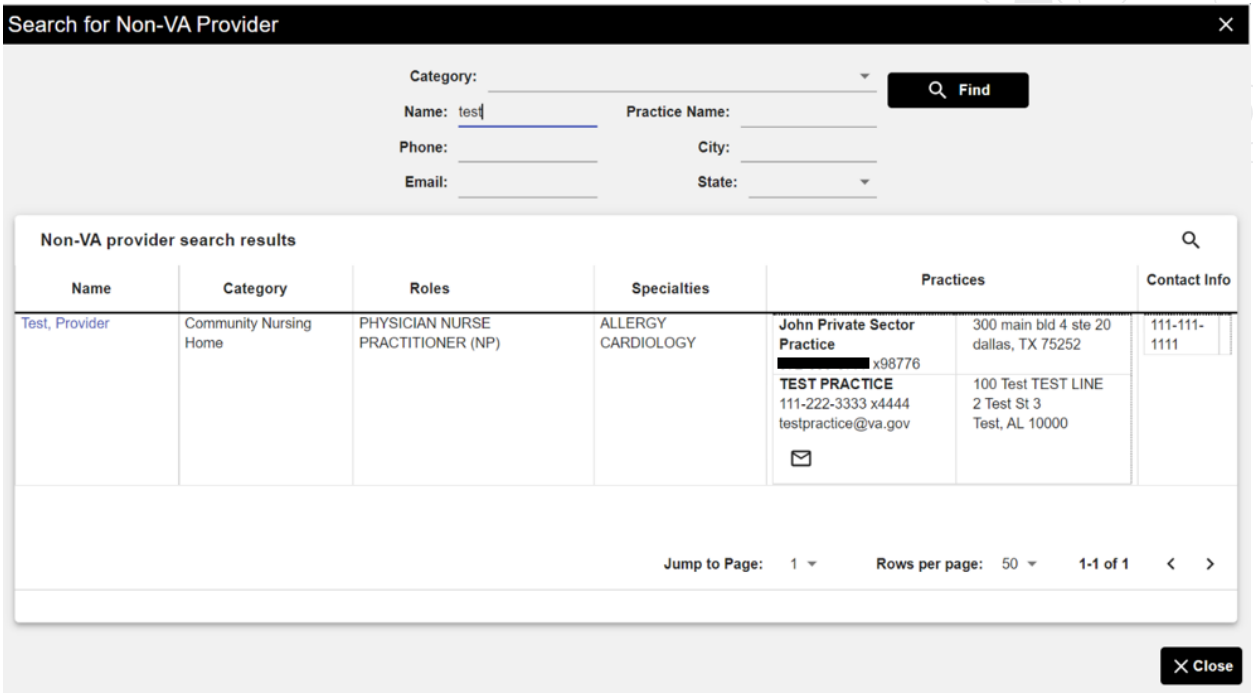
1. Select **Non-VA Provider> Search for Non-VA Provider** from the main menu to display the *Search for Non-VA Provider* window.

Figure 155 - Search for Non-VA Provider Menu Op on



2. Select a Non-VA Provider type from the **Category** drop-down list. The following are
3. available:
    - DoD
    - Private Sector
    - Veteran's Choice
    - Community Nursing Home
    - Veteran State Home
4. Enter the full name for the Non-VA Provider in the **Name** text box.
5. Enter the phone number associated with the Non-VA Provider in the **Phone** text box.
6. Enter the email address associated with the Non-VA Provider in the **Email** text box.
7. Enter the prac ce name associated with the Non-VA Provider in the **Prac ce Name** text box.
8. Enter the city associated with the Non-VA Provider in the **City** text box.
9. Select the state associated with the Non-VA Provider in the **State** drop-down menu.
10. Click **Search** to display search results. The Results list will display the Provider Name, Category, Roles, Special es, Prac ce Name and Provider Contact informa on. The list can be sorted by any column or narrowed by using a filters. If the Non-VA Provider has an email, click the e-mail icon that corresponds to the provider name.
11. Click **Cancel** to cancel the search.
12. Click the **name link** to view or modify the Non-VA Provider on the *Non-VA Provider Profile* screen.

Figure 156 - Search for Non-VA Provider Screen

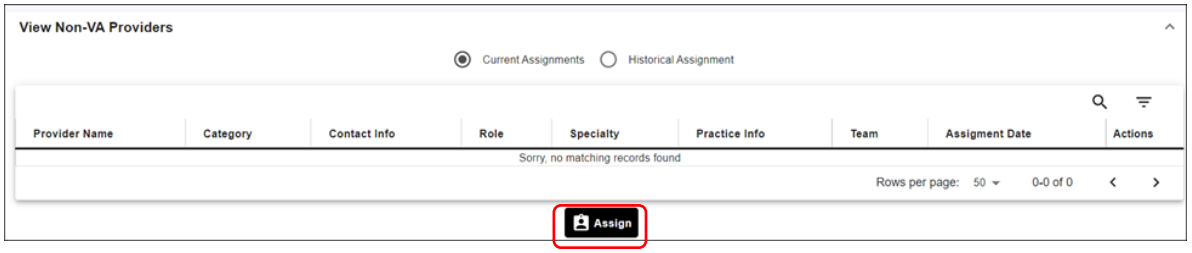


19.4 Assign a Non-VA Provider to Pa ent

A user can assign a Non-VA Provider from the Pa ent Profile.

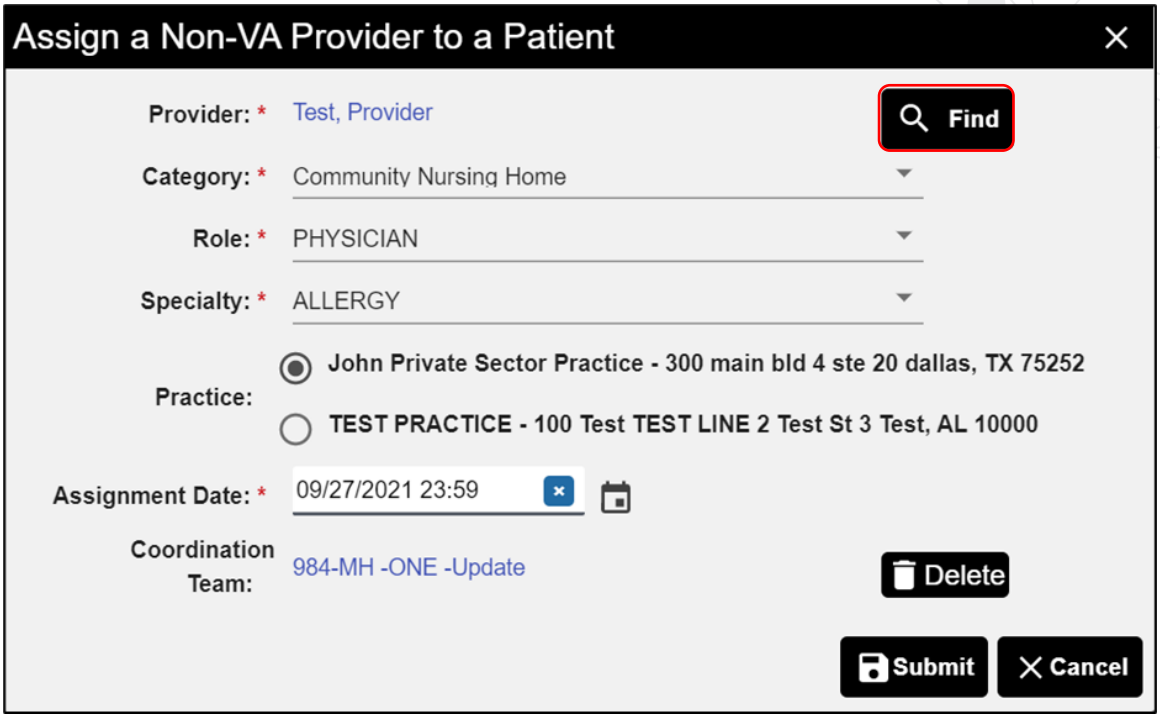
1. From the Pa ent Profile screen, click the **View Non-VA Providers** toggle link to display a list of Non-VA Providers the pa ent is assigned or has been unassigned.
2. Click the **Assign** bu on to display the *Assign a Non-VA Provider to a Pa ent* screen.

Figure 157 - View Non-VA Providers Screen with the Assign Bu on Selected



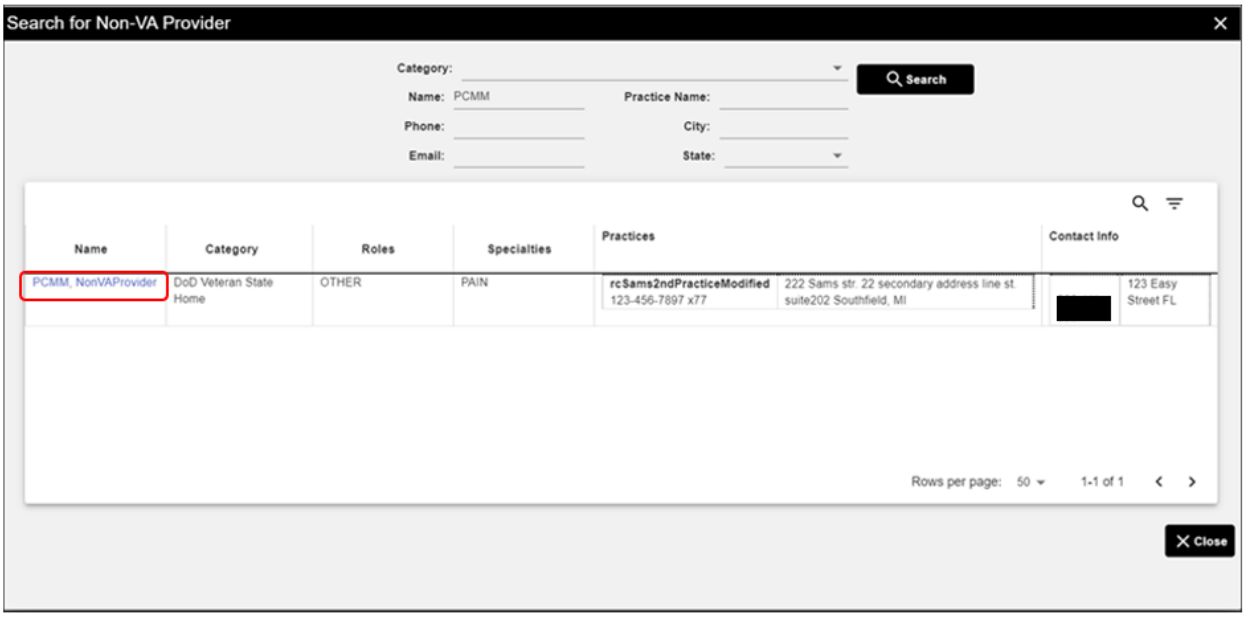
3. Click the **Search** bu on to display the *Search for Non-VA Provider* window.

Figure 158 - Assign a Non-VA Provider to a Pa ent Screen Searching for a Provider



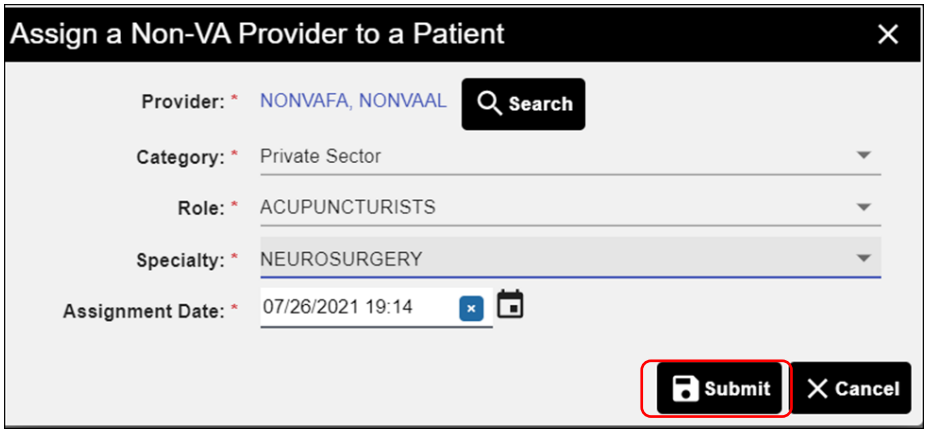
4. Select the type of Non-VA Provider from the **Category** drop-down menu. Available options are:
   - DoD
   - Private Sector
   - Veteran's Choice
   - Community Nursing Home
   - Veteran State Home
5. Enter the last name for the Non-VA Provider in the **Name** text box.
6. Enter the phone number associated with the Non-VA Provider in the **Phone** text box.
7. Enter the email address associated with the Non-VA Provider in the **Email** text box.
8. Enter the practice name associated with the Non-VA Provider in the **Practice Name** text box.
9. Enter the city associated with the Non-VA Provider in the **City** text box.
10. Select the state associated with the Non-VA Provider in the **State** drop-down menu.
11. Click **Search** to display search results. The Results list will display the Provider Name, Category, Role, Specialty, Practice Name, Phone Number, Email, and Address. The list can be sorted by any column or narrowed by using a filters. If the Non-VA Provider has an email listed, click the e-mail icon that corresponds to the provider name to send a message.
12. Click the **name** link to assign the Non-VA Provider to the Patient and to display the *Assign a Non-VA Provider to a Patient* screen.

Figure 159 - Search for Non-VA Provider Screen



13. Select the Non-VA Provider type in the **Category** drop-down menu. A er the Category is selected, the Non-VA Prac ce associated displays and is automa cally selected. For the Private Sector and DoD Categories, a user has the op on to keep the preselected Non-VA Prac ce or to select the No Prac ce Selected radio bu on.
14. Select the role type from the **Role** drop-down list.
15. Select the specialty from the **Specialty** drop-down list.
16. Click the **calendar** icon next to the Assignment Date field to select the date and me the assignment will be effec ve.
17. Click **Submit** to assign the pa ent to the Non-VA Provider.

Figure 160 - Submi ng the Pa ent Assignment to the Non-VA Provider



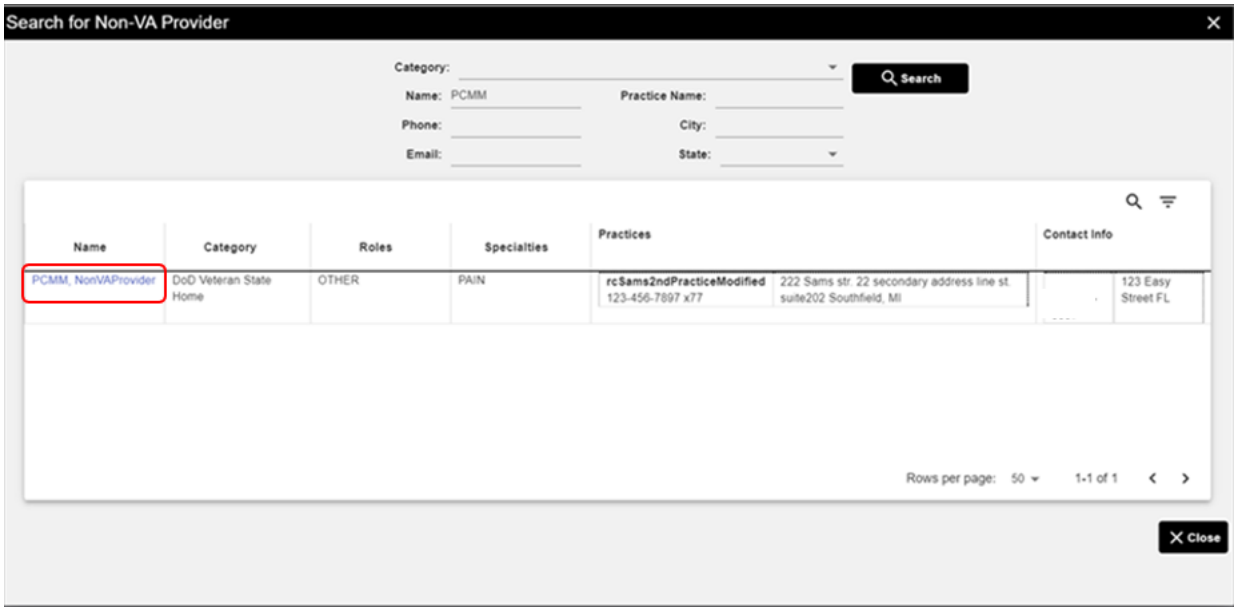
18. A confirma on message will appear if the assignment was successful. Click **OK** to con nue.

19.5 Modify an Exis ng Non-VA Provider

Users can edit Non-VA Provider records already listed in PCMM Web.

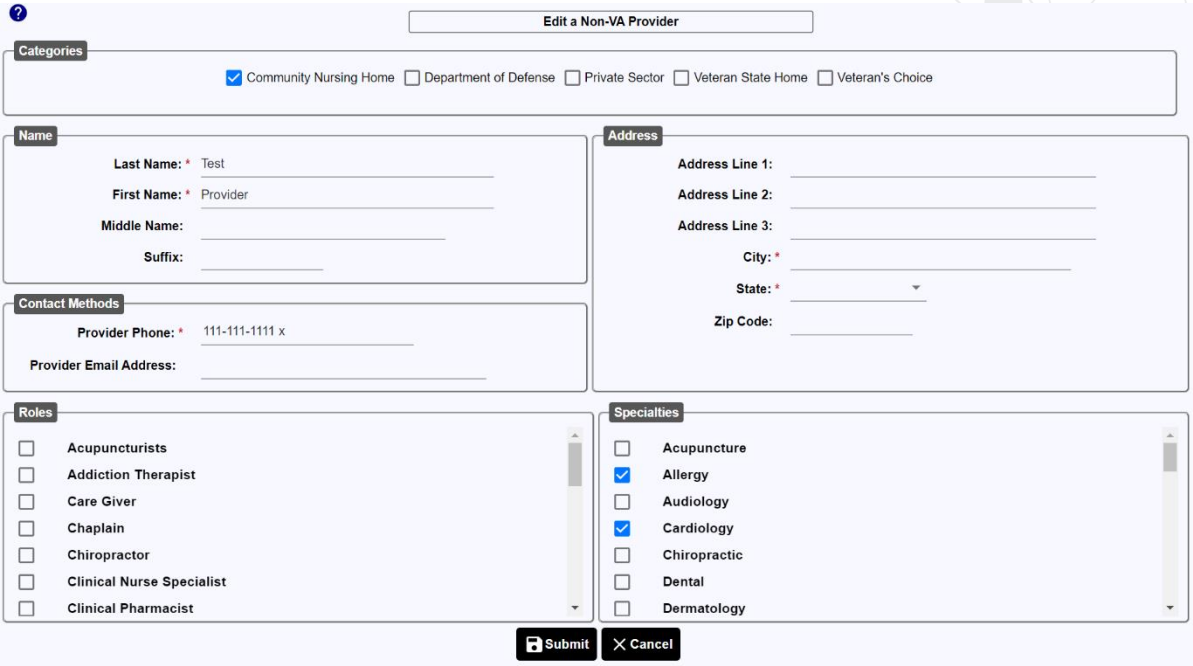
1. Locate the Non-VA Provider's informa on using the *Search for Non-VA Provider* window or from the View Non-VA Providers sec on from a *Pa ent Profile* screen.
2. Click the provider **name link** listed in the **Provider Name** or **Name** column.

Figure 161 – Search for a Non-VA Provider with the Name Link Selected



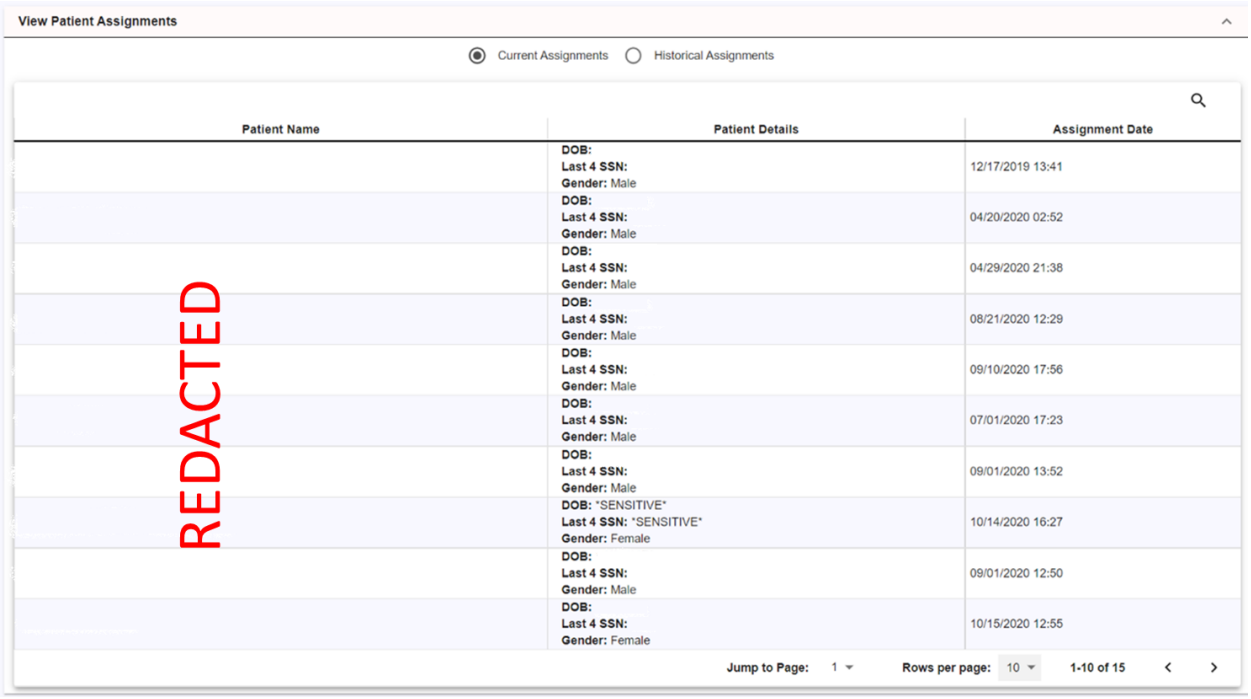
3. The *Non-VA Provider Profile* screen will display. Modify any or all of the fields shown.

Figure 162 – Edit a Non-VA Provider Profile Screen



4. Click the **View Pa ent Assignments** toggle link at the bo om of the screen to view a list of pa ent assignments. When selected, the **Historical Assignments** op on displays pa ents previously assigned to team. To revert to the current list, select the **Current Assignments** op on. To filter through the pa ent list, use the text box provided.

Figure 163 - View Pa ent Assignment Sec on

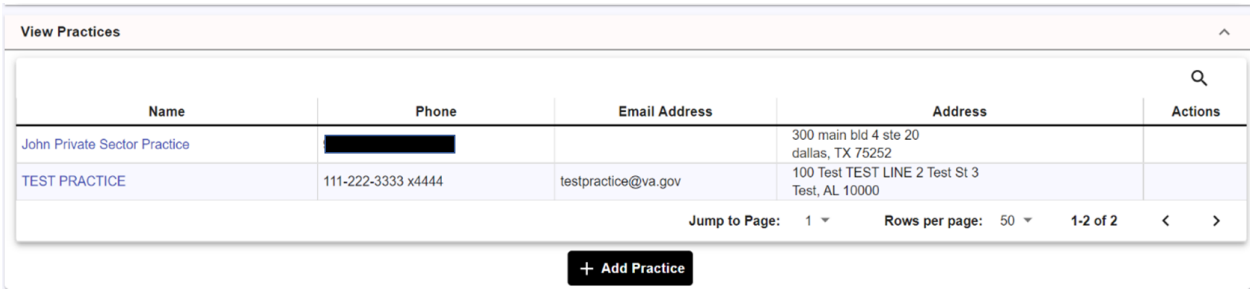


5. Click the **View Prac ces** toggle link at the bo om of the screen to view a list of prac ce assignments. The View Prac ces sec on includes the Prac ce Name, Phone Number, and Email

Address and an Ac on column. If the Non-VA Provider has an email, click the email icon to email the staff member.

- To delete a Prac ce from the Non-VA Provider, select the **Delete** icon in the Ac on column.
- To add a new Prac ce to the Non-VA Provider, click the **Add** bu on to display the Search for Non-VA Prac ce box. Enter the appropriate search criteria and then select the Non-VA Prac ce.

Figure 164 - View Prac ces Sec on to View a List of Prac ce Assignments.



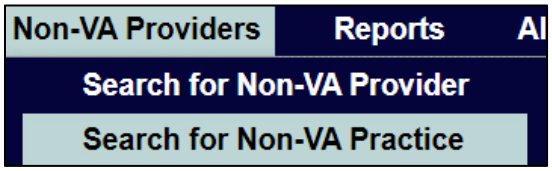
6. Click **Submi**t to con nue, **Cancel** to cancel.
7. The *Non-VA Provider Profile* screen displays, with the changes saved in the record

19.6 Create a New Non-VA Prac ce

A user can create a Non-VA Prac ce, associated with a Non-VA Provider to provide care to the pa ent, outside the VA. A user can create a Non-VA Prac ce when searching for a Non-VA Provider to assign to a Pa ent, or from the main menu.

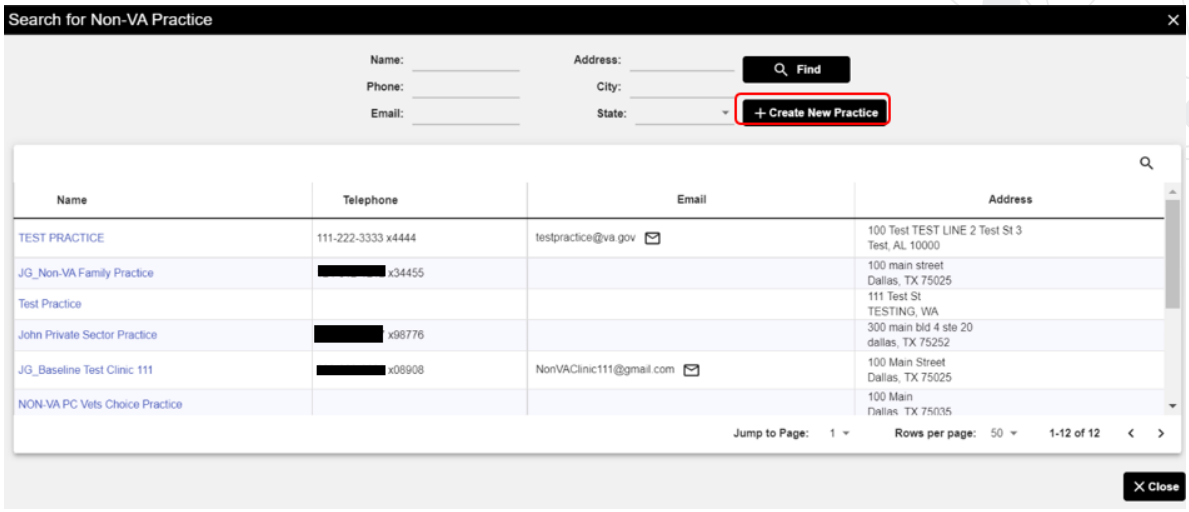
1. Select **Non-VA Providers> Search for Non-VA Prac ce** from the main menu to display the *Search for Non-VA Prac ce* screen.

Figure 165 - Search for Non-VA Prac ce Menu Op on Selected to Create a Non-VA Prac ce



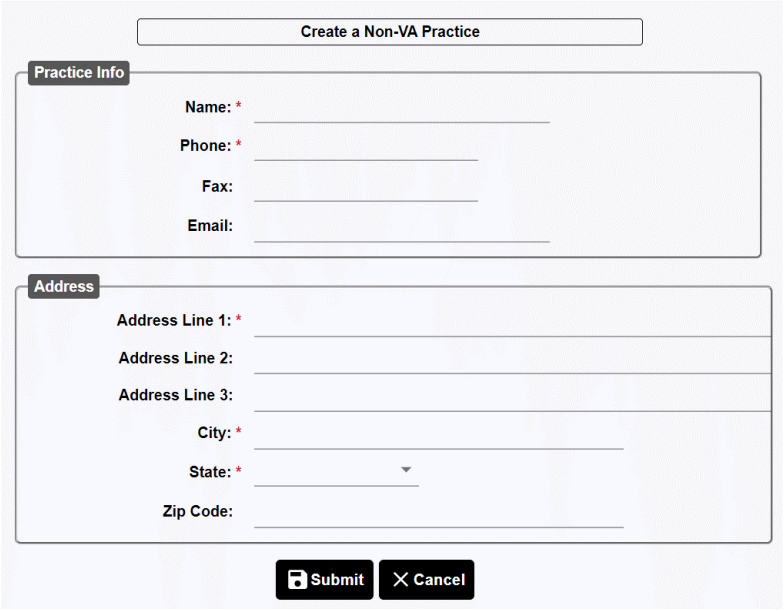
2. Click the Search bu on or enter the search criteria for a Non-VA Prac ce.
   - **Note:** To avoid duplica ons of prac ces, a user must search for an exis ng Non-VA Prac ce before being allowed to create a new one. If the prac ce is not available when the search criteria are returned, a user can then create the Non-VA Prac ce.
3. If a Non-VA Prac ce is unavailable, click the **Create New Prac ce** bu on to display the *Create a Non-VA Prac ce* screen.

Figure 166 - Search for Non-VA Prac ce Screen with the Create New Prac ce Bu on Selected



4. Enter the Non-VA Prac ce in the **Name** text box.
5. Enter the phone number in the **Phone** text box.
6. Enter the fax number in the **Fax** text box.
7. Enter the main email address for the Non-VA Prac ce in the **Email** text box.
8. Enter the address(es) for the Non-VA Prac ce in the **Line 1**, **Line 2**, and **Line 3** text boxes.
9. Enter the city in the **City** text box.
10. Select the state in the **State** drop-down menu.
11. Enter the ZIP code in the **Zip Code** text box.
12. Click **Submit** to con nue, Cancel to cancel.

Figure 167 - Create a Non-VA Prac ce Screen

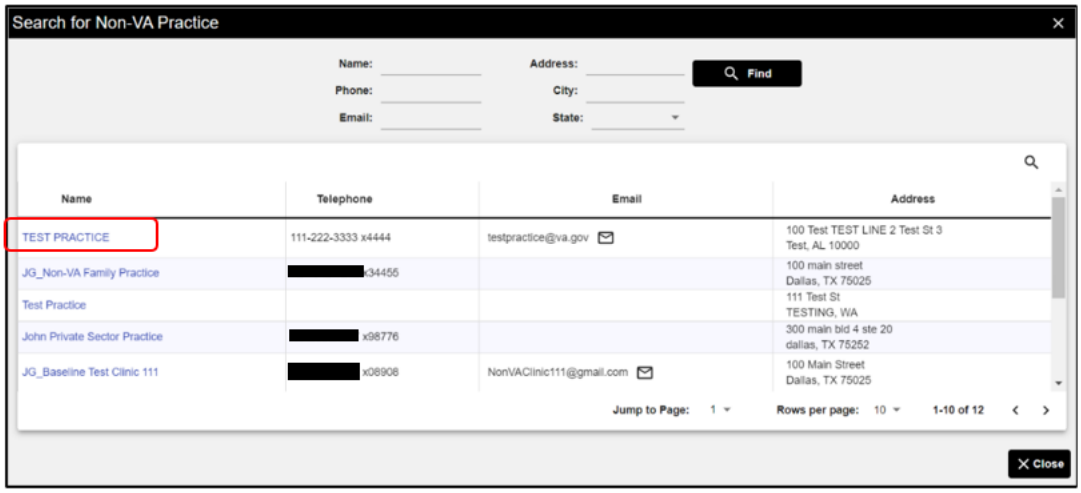


19.7 Update an Exis ng Non-VA Prac ce

Users can edit Non-VA Practice records in PCMM Web.

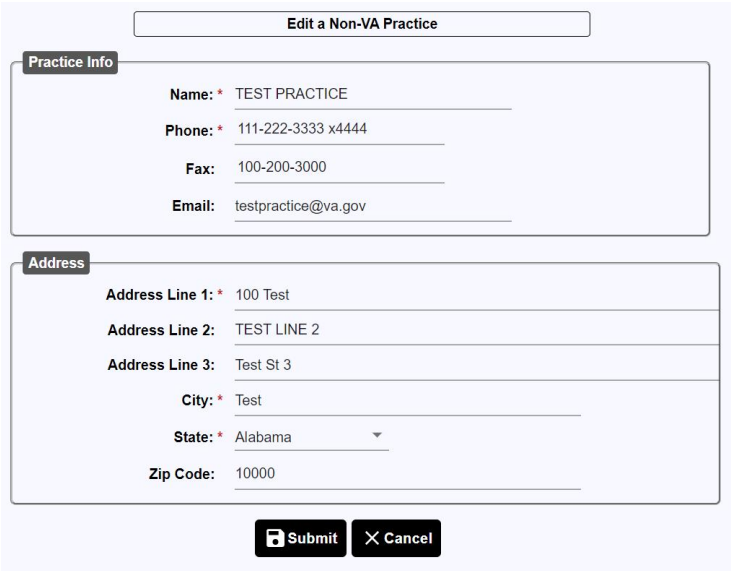
1. Locate the Non-VA Prac ce using the *Search for Prac ce* window or from the **View Prac ce** sec on of the *Non-VA Provider Profile* screen.
2. Click the provider name link listed in the Provider Name or Name column.

Figure 168 - Search for Non-VA Prac ce Screen with Prac ce Selected



3. The Non-VA Prac ce Profile screen will display. Modify any or all of the fields shown.
4. Click **Submit** to con nue, **Cancel** to cancel.

Figure 169 – Non-VA Prac ce Profile Screen



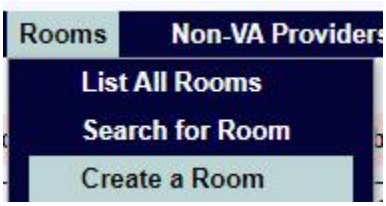
20 Rooms Management

20.1 Create a Room

To Create a Room:

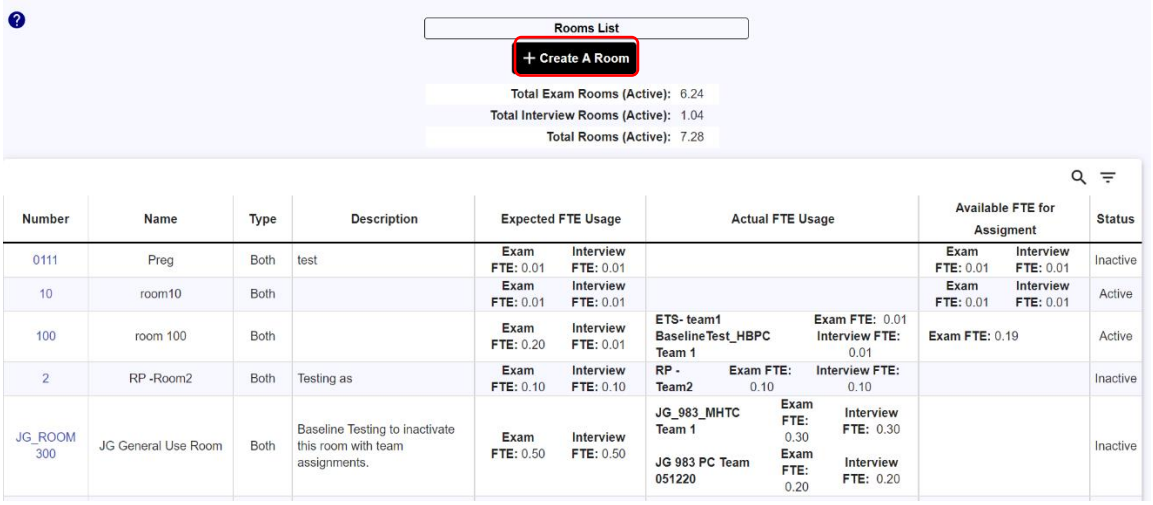
1. Select **Create a Room** from the **Rooms** drop-down menu to display the *Create a New Room* screen.

Figure 170 - Create a Room Menu Op on



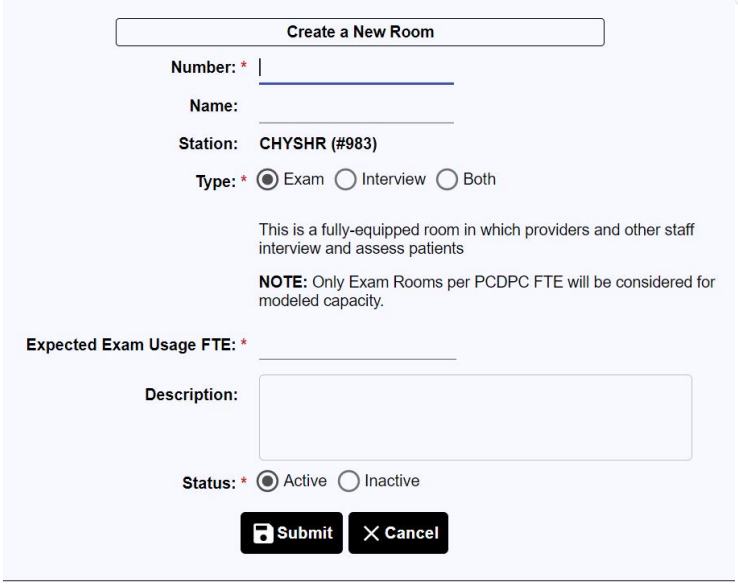
- **Note:** Or a user can navigate to the *Create a New Room* screen by following this path: **Rooms** drop-down menu > **List All Rooms** > *List All Rooms* screen > **Create a Room** bu on.

Figure 171 - Room List Screen with the Create a Room Bu on Selected



2. Enter a unique room number in the **Number** field. This is an alphanumeric field.
3. Enter a room name in the **Name** field.
4. Select a room type. (*Exam* is selected by default). For each selec on, a descrip on of the room type is displayed.
5. Enter an expected **FTE** value. It must be greater than 0.00 and it cannot be greater than 1.5.
6. Enter a room descrip on in the **Descrip on** field.
7. Accept the default room status of **Ac ve**, or select **Inac ve**. A user can edit the room informa on later.
8. Click **Submit** to save the data and display the *Rooms List* page. The new room will be listed.

Figure 172 - Create a New Room Screen



20.2 Manage Rooms

PCMM Coordinators are able to manage rooms using the *List All Rooms* screen.

1. Select **List All Rooms** from the **Rooms** drop-down menu to display the *Rooms List* screen.

Figure 173 - List of All Rooms Menu Op on to Manage Rooms

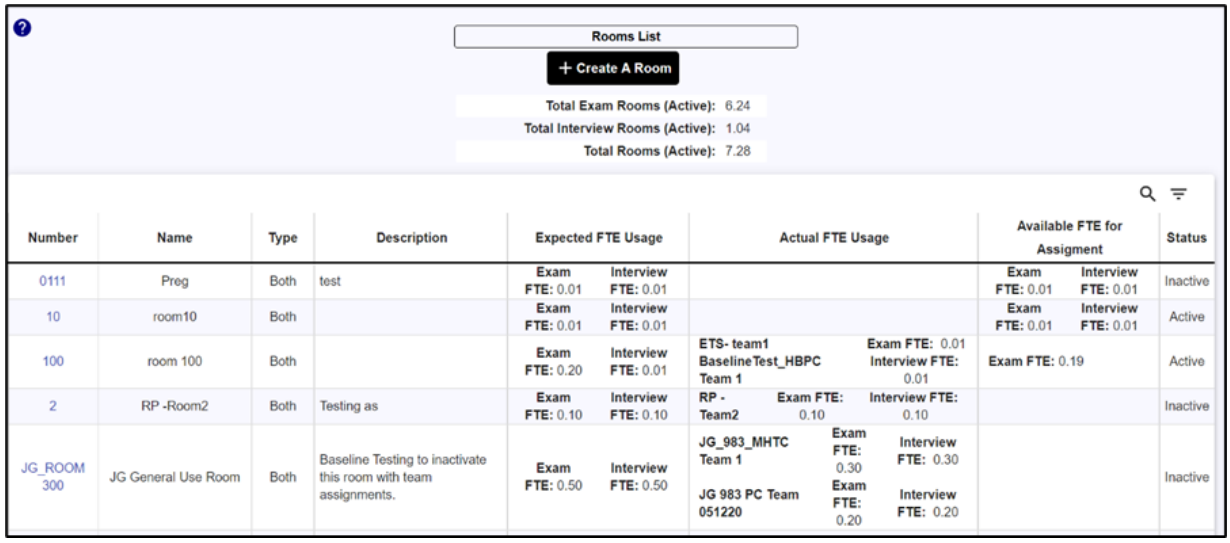
2. For each room, the list will display the:
   - Total Exam Rooms (Ac ve)
   - Total Interview Rooms (Ac ve)
   - Total Rooms (Ac ve)
   - Room Number
   - Room Name
   - Room Type (examina on, interview, or both)
   - Room Descrip on
   - Expected FTE Usage (0.01 – 1.00)
   - Actual FTE Usage
   - Available FTE for Assignment (determined by system)

- Room Status (Ac ve/Inac ve)

The room list will ini ally be displayed in order by *Number* and will include all rooms. The list can be sorted by any column or narrowed by applying filter values for Type and Status. A user can perform the following tasks on this screen, depending on the user role:

- Create a room by clicking the **Create a Room** bu on.
- Modify a selected room by clicking the **Room Name** link.

Figure 174 - Room List Screen to Create or Modify a Room



Number	Name	Type	Description	Expected FTE Usage	Actual FTE Usage	Available FTE for Assigment	Status
0111	Preg	Both	test	Exam FTE: 0.01 Interview FTE: 0.01		Exam FTE: 0.01 Interview FTE: 0.01	Inactive
10	room10	Both		Exam FTE: 0.01 Interview FTE: 0.01		Exam FTE: 0.01 Interview FTE: 0.01	Active
100	room 100	Both		Exam FTE: 0.20 Interview FTE: 0.01	ETS- team1 Exam FTE: 0.01 BaselineTest_HBPC Team 1 Interview FTE: 0.01	Exam FTE: 0.19	Active
2	RP -Room2	Both	Testing as	Exam FTE: 0.10 Interview FTE: 0.10	RP - Team2 Exam FTE: 0.10 Interview FTE: 0.10		Inactive
JG_ROOM 300	JG General Use Room	Both	Baseline Testing to inactivate this room with team assignments.	Exam FTE: 0.50 Interview FTE: 0.50	JG_983_MHTC Team 1 Exam FTE: 0.30 Interview FTE: 0.30 JG 983 PC Team 051220 Exam FTE: 0.20 Interview FTE: 0.20		Inactive

20.3 Search for a Room

1. Select **Search for Room** on the **Rooms** drop-down menu on the PCMM Web home page to display the *Search for Room* dialog box.

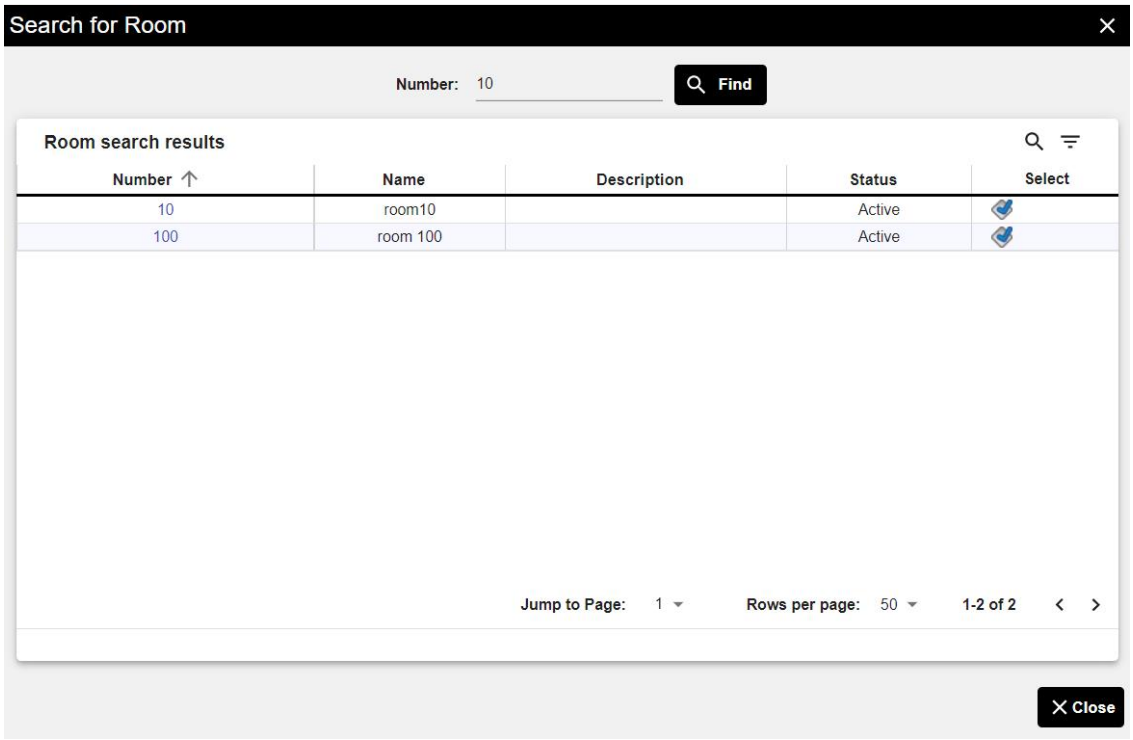
Figure 175 - Search for Room Menu Op on

2. Enter all or part of the room desired in the *Number* field and click **Search** to display a list of rooms below the **Search** bu on. Alterna vely, leave the Number field blank and click the **Search** bu on to display a list of all rooms for that sta on.
3. The *Search for a Room* dialog box will display. The following columns are displayed in the room list table:
   - Number
   - Name

- Descrip on
- Status
- Select

4. Click the icon in the **Select** column for the desired room to display room informa on in the *Modify An Exis ng Room* screen. Alterna vely, click **Cancel** to cancel out of the search.

Figure 176 - Search for a Room to Modify



20.4 Modify an Exis ng Room

To Modify an Exis ng Room:

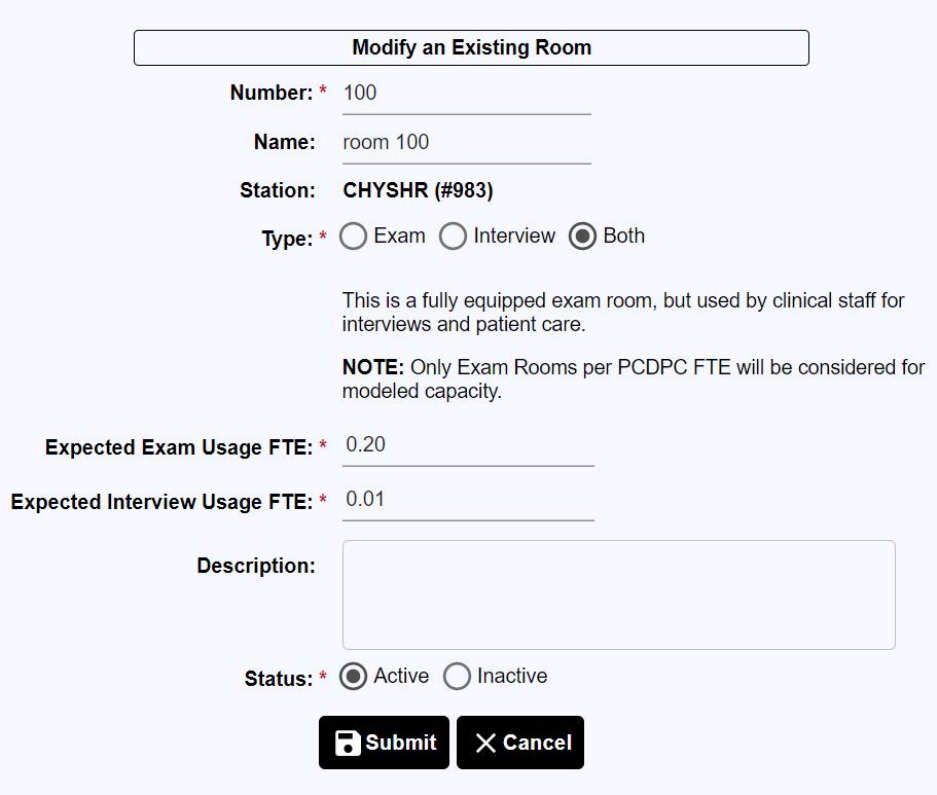
1. Search for a room to modify from the *Search for Room* dialog box or from the Rooms List screen.
2. On the *Modify an Exis ng Room* screen, modify the following informa on for that room:
   - Number
   - Name
   - Type
   - Expected Examina on Usage FTE
   - Expected Interview Usage FTE
   - Descrip on
   - Status (Ac ve/Inac ve)

- Every field value except for Room Name and Descrip on is required and must contain a value.

3. Click **Submit** to save the informa on and display the *Room List* screen.

From this screen a user can also view the Ac ve Team Assignments and the Inac ve/Historical Team Assignments for the room.

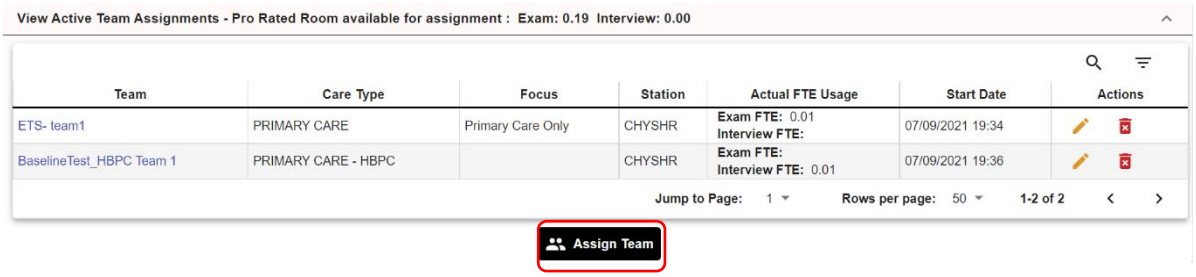
Figure 177 - Modify an Exis ng Room Screen



20.5 Assign a Room to a Team

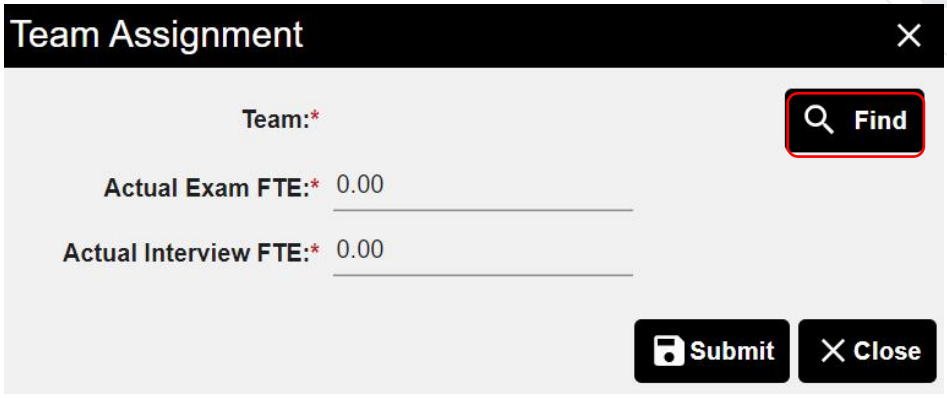
1. From the *Modify An Exis ng Room* screen, click the **View Ac ve Team Assignments** toggle link to view a list of team and room assignments.
2. Click **Assign Team** to display the *Team Assignment* dialog box.

Figure 178 - View Ac ve Team Assignments Sec on with the Assign a Team Bu on Selected



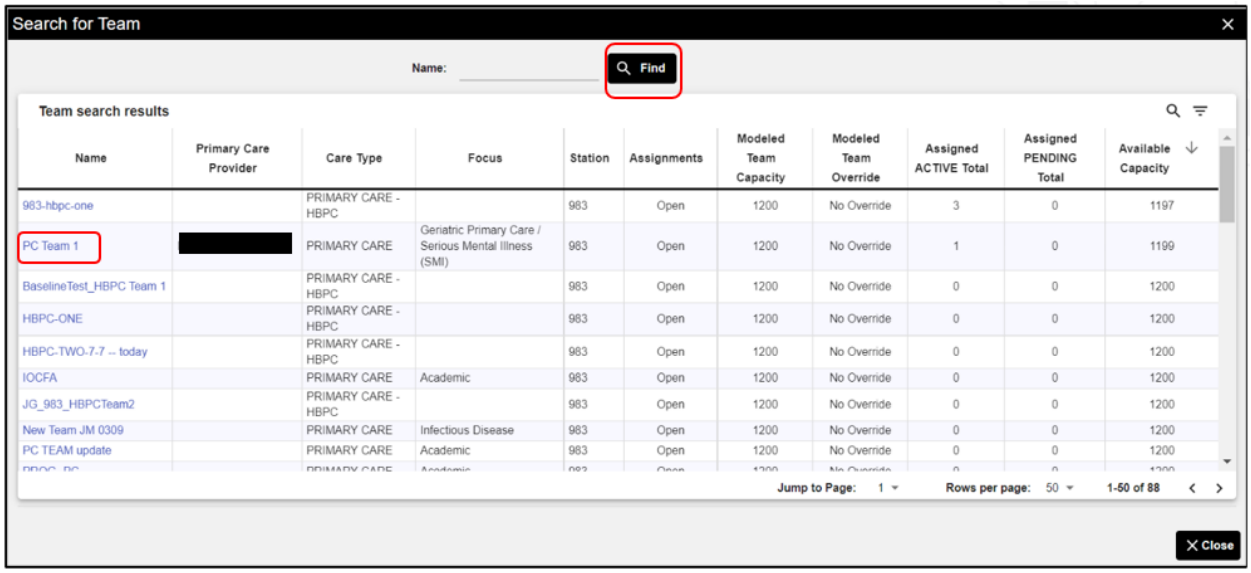
3. Click **Find** to display the *Search for Team* dialog box.

Figure 179 - Team Assignment Box



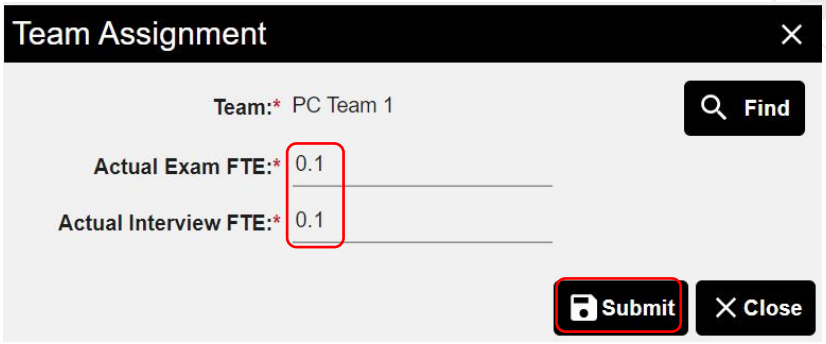
4. Enter all or part of the team name desired in the **Name** field and click **Search** to display a list of teams. Alterna vely, leave the *Name* field blank and click the **Search** bu on to display a list of all teams.
5. Select the **team name** link in the Name column to return to the Team Assignment dialog box and populate the *Team* field.

Figure 180 - Searching for a Team to Assign to a Room



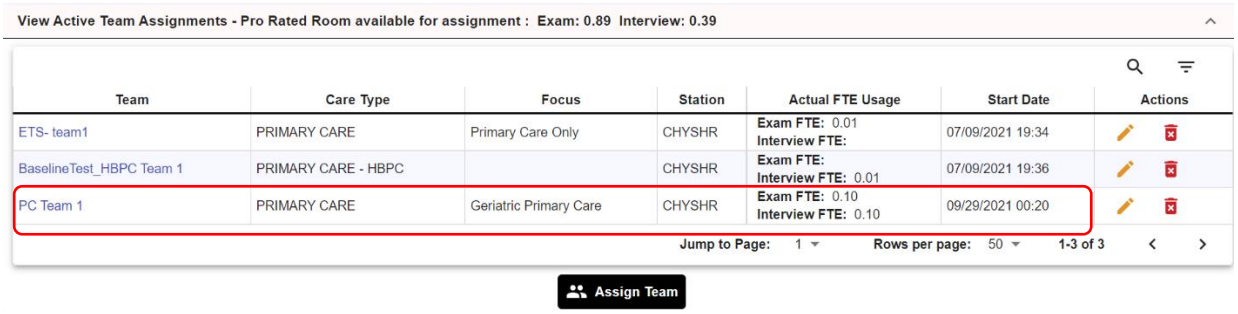
6. Enter an **Actual FTE** value for the exam, Interview, or both rooms. The FTE value must be greater than 0.00 and it cannot be greater than 1.5. If the FTE value entered for the team assignment is greater than the FTE value assigned to the room, an error message will display.
7. Click **Submit** to save the informa on and display the *Modify an Exis ng Room* screen.

Figure 181 - Actual Exam FTE Defined for the Team Assignment



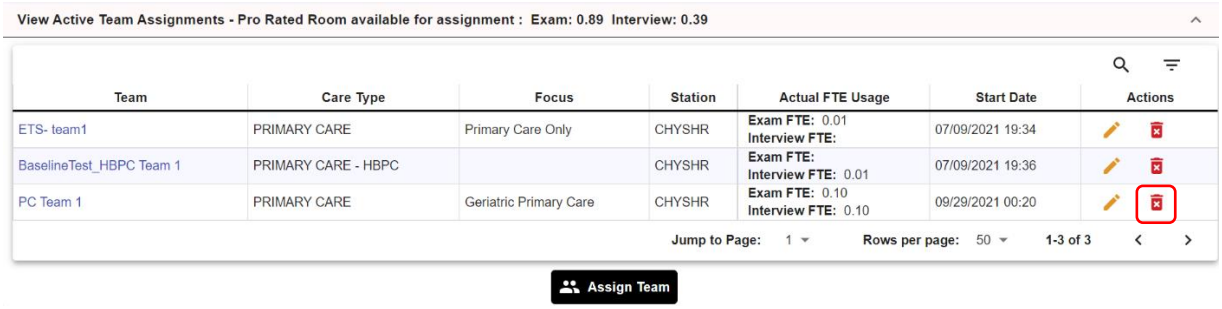
8. Click the **View Ac ve Team Assignments** toggle link to view a list of teams and room assignments. The new team and room assignment is listed.

Figure 182 - Newly Assigned Room to the Team



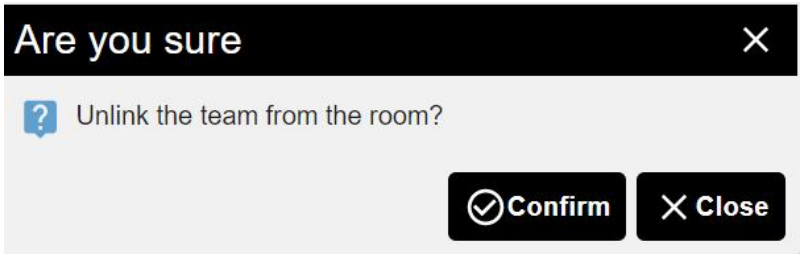
9. Unlink a team from the room assignment, or change the actual FTE value for a team's use of the room by clicking the **X** icon in the *Ac ons* column that corresponds to the team to unlink.

Figure 183 - Red X Icon Selected to Unlink a Team from a Room



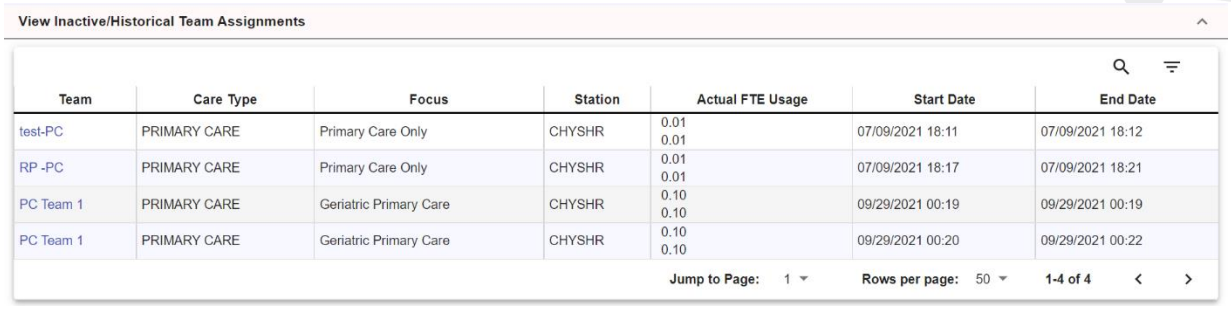
10. An *Are you sure* dialog box will display. Click **Confirm** to con nue; **Cancel** to cancel.

Figure 184 - Confirma on to Unlink the Team from the Room Message



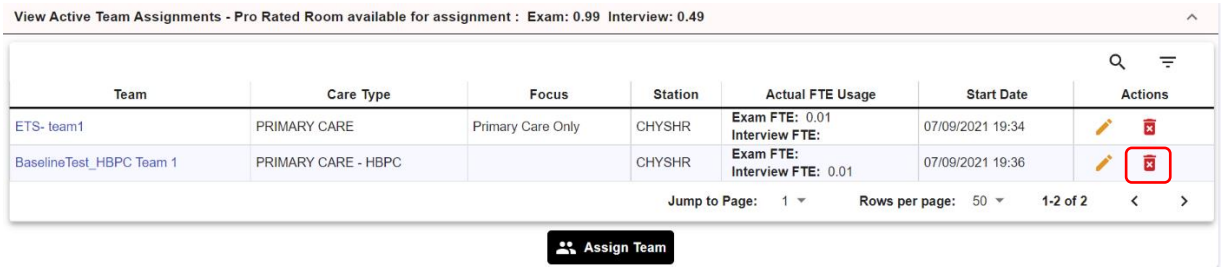
11. Click the **View Inac ve/Historical Team Assignments** toggle link to view the team's assignment record.

Figure 185 - Viewing Team Assignment Records in the View Inac ve/Historical Team Assignments Sec on



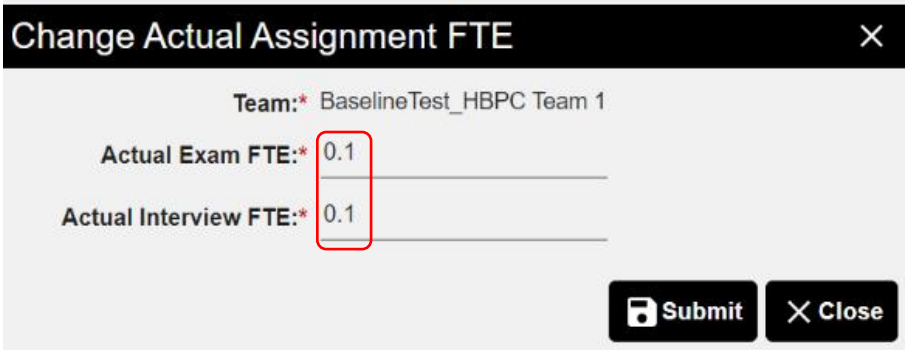
12. To change the Actual FTE value for a team's use of the room, click the **pencil icon** in the *Ac ons* column that corresponds to the team's FTE.

Figure 186 - Ac on Icon Selected to Change the Actual FTE Value



13. The *Change Actual Assignment FTE* dialog box will display. Enter an **Actual FTE** for the team.

Figure 187 - Change Actual Assignment FTE box

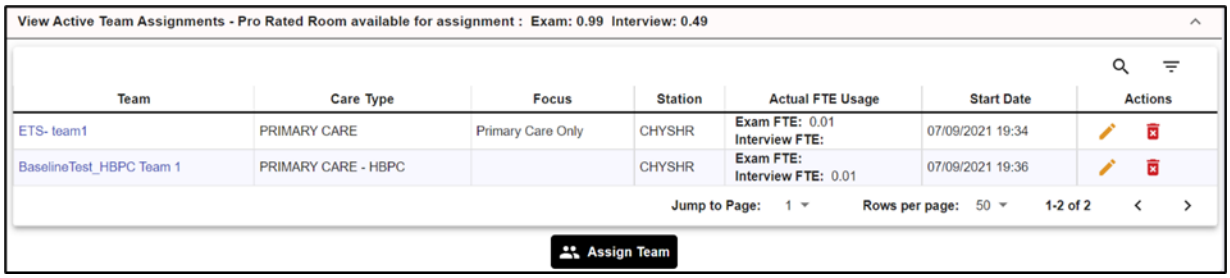


14. Click **Submit** to con nue, **Cancel** to cancel.
15. If the FTE value entered for the team assignment is greater than the FTE value assigned to the room, an error message will display. Click **Close** and enter a valid FTE value.
16. Click **Submit** to save the record.

20.6 View Room Assignments for a Team

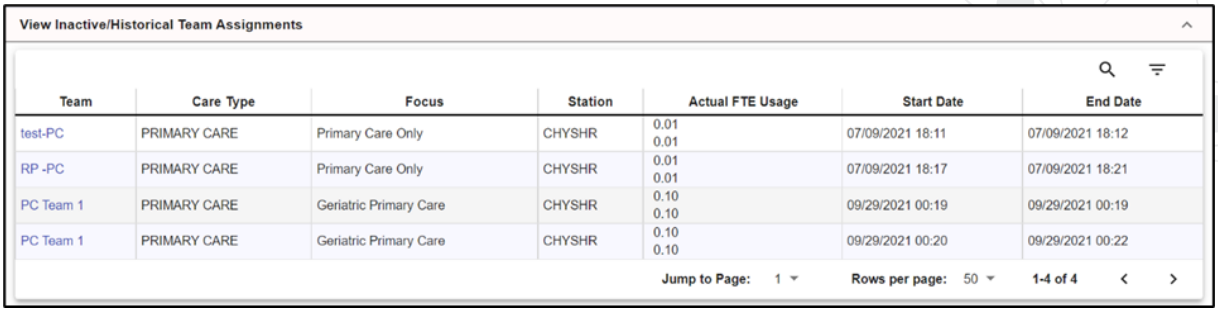
1. From the *Modify an Exis ng Room* screen, click the **View Ac ve Team Assignments** toggle link to view a list of team and room assignments. The following informa on will display:
   - Team
   - Care Type
   - Focus
   - Sta on
   - Actual FTE Usage
   - Assignment ac ve since
   - Ac ons (Use this column to either unlink the team from the room assignment or change the Actual FTE value for a team's use of the room.)
   - The list can be sorted by any column or narrowed by applying filter values for Care Type and Focus.

Figure 188 - View a Room Assignment on the View Ac ve Team Assignments Sec on



2. Click the **View Inac ve/Historical Team Assignments** toggle link to view a list of past team and room assignments. The following informa on will display:
   - Team
   - Care Type
   - Focus
   - Sta on
   - Actual FTE Usage
   - Assignment Start Date
   - Assigned End Date
   - The list can be sorted by any column or narrowed by applying filter values for *Care Type* and *Focus*.

Figure 189 - View Inac ve/Historical Team Assignments Sec on



21 Group Management

U lizing groups is an administra ve tool that allows the user to group similar teams together, such as team purpose or loca on. A user is able to create a new group and add the group informa on to the PCMM Web system. This adds the group name to the *Group List* screen and allows a user to search for the group informa on.

21.1 Create a New Group

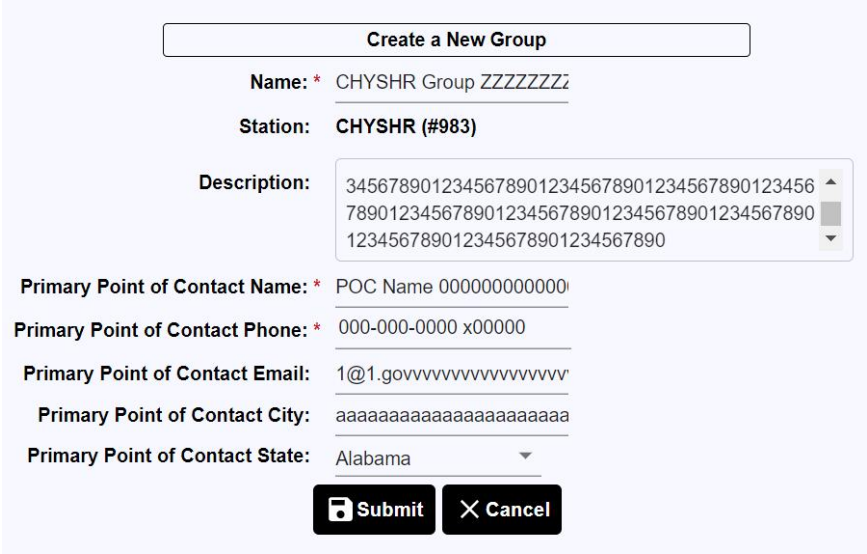
1. From the **Groups** drop-down menu, select **Create a Group** to display the *Create a New Group* screen. A user also can display this screen by clicking the Create a Group bu on on the *List Groups* screen (**Groups > List All Groups > List Groups**).

Figure 190 - Create a Group Menu Op on

2. Enter a name for the group. The system will ensure that the new name is unique across all sta ons with the same three-digit code as the currently logged-in sta on. The system will display an error message if a duplicate group name is found. If so, please enter a new unique group name.
3. Enter a descrip on of the group in the **Descrip on** field.
4. Enter a Primary Point of Contact name.
5. Enter a Primary Point of Contact phone number.
6. Enter a **Primary Point of Contact** city and state.
7. Click **Submit** to save the group informa on and display the *Groups List* screen. The new group will be listed with a current status of **Ac ve**. Click **Cancel** to return to the *Groups List* screen without saving any data.
    - The system will display an error message for any required field that is not completed. Complete the fields before re-submi ng the group informa on.

- The system will validate the values of the required fields for *Name* and *Primary Point of Contact Email* to ensure proper entry.
- A *Current Status* field will automa cally populate with an **Ac ve** status once a group is created and will be displayed on the "Modify an Exis ng Group" screen. A user can also inac vate a group.

Figure 191 - Create a New Group Screen



21.2 View Groups List

A user can view a sta on-level summary list of all ac ve groups. This allows a user to view or modify group informa on, email a group's primary point of contact, view informa on about a group's teams, and inac vate a group.

1. From the **Groups** drop-down menu, select **List All Groups** to display the *Groups List* screen.

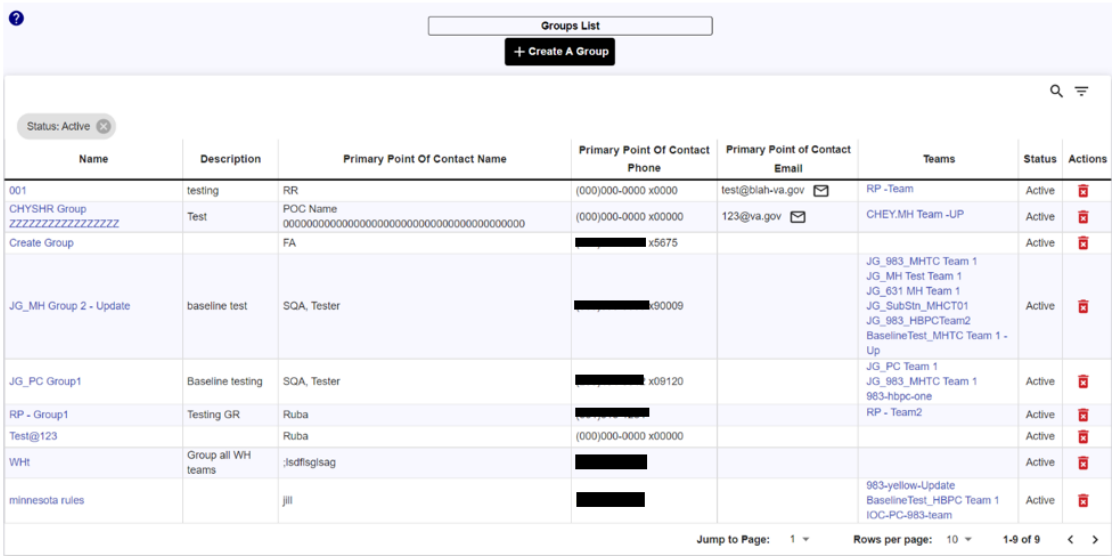
Figure 192 - List All Groups Menu Op on to View Group Lists

2. For each group listed for that sta on, the list will display:
   - Name
     - View or modify group informa on by clicking a name link in the **Name** column. This will display the *Modify an Exis ng Group* screen.
   - Descrip on

- Primary Point of Contact Name
- Primary Point of Contact Phone
- Primary Point of Contact E-mail
    - Email a group's primary point of contact by clicking the envelope icon in the **Primary Point of Contact** E-mail column.
- Teams
    - A user can view informa on about teams assigned to a group by clicking a **team name** link in the **Teams** column. This will display the *Modify an Exis ng Team* screen.
- Status (Ac ve or Inac ve)
- Ac ons
    - Inac vate a group by clicking the icon in the **Ac ons** column. Note that once a group is inac vated, all teams assigned to the group are unassigned from the group and the group cannot be reac vated. See the *Inac vate a Group* sec on for more informa on

3. The list can be sorted by any column or narrowed by using a filter for **Current Status**. Ac ve teams are listed first, followed by inac ve teams.
    - **Note:** the list of groups can be narrowed by using a filter for **Current Status**. Ac ve teams are listed by default.

Figure 193 - Group List Screen



21.3 Search for a Group

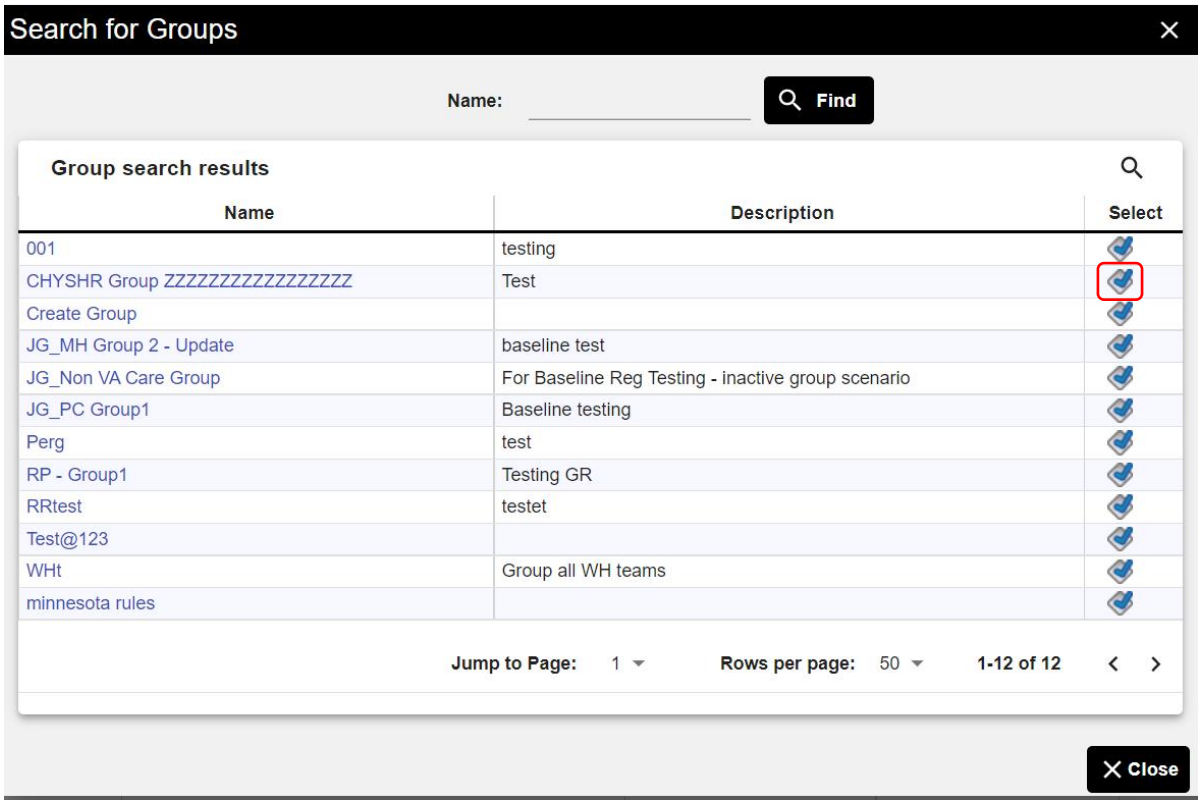
A user can search for a group to view or modify.

1. Select **Search for Group** on the *Groups* drop-down menu on the PCMM Web home page to display the *Search for Group* dialog box.

Figure 194 - Search for Group Menu Op on

2. Enter all or part of the group name desired in the **Name** field and click **Search** to display a list of groups with that search criteria. Alterna vely, a user can also leave the Name field blank and click the **Search** bu on to display a list of all groups for that sta on.
3. The *Search for Group* dialog box will display. The following columns are displayed in the group list table:
   - Name
   - Descrip on
   - Select
4. Click an icon (blue check) in the **Select** column for the desired group to display the *Modify an Exis ng Group* screen. *See the* Modify an Exis ng Group *sec on for more informa on.*

Figure 195 - Search for Group Screen

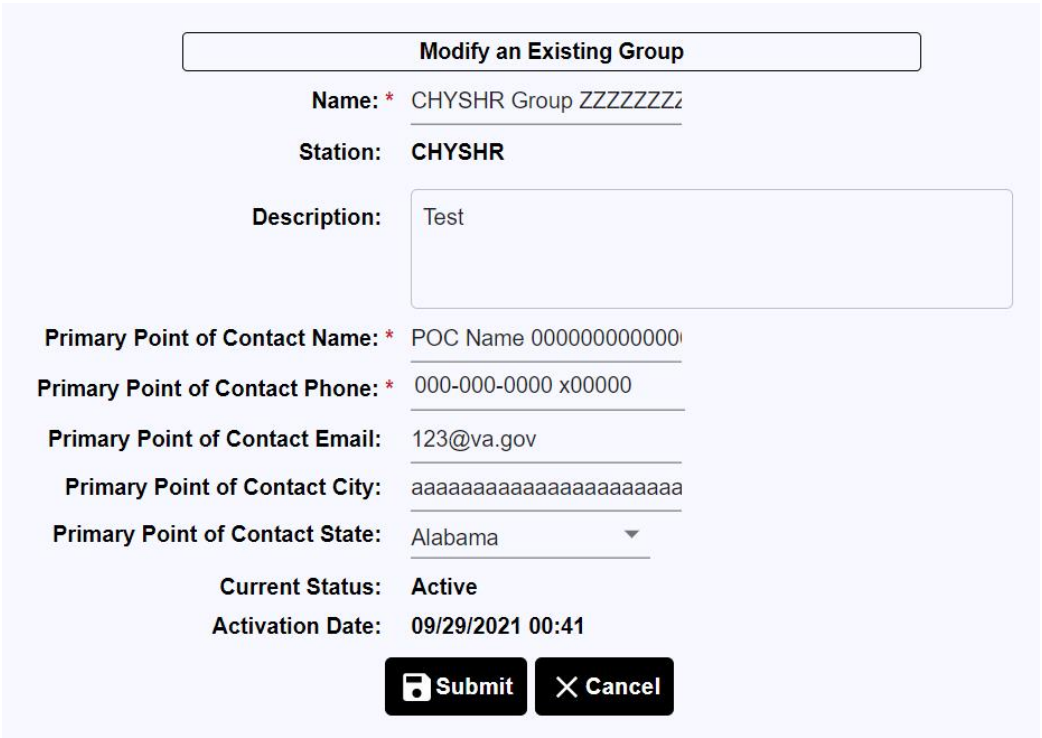


21.4 Modify an Exis ng Group

A user can view or modify informa on for a group in the *Modify an Exis ng Group* screen.

1. From the *Modify An Exis ng Group* screen for the group (*see the* Modify An Exis ng Group *sec on*), the following informa on will be displayed:
   - Name
   - Sta on
   - Descrip on
   - Primary Point of Contact Name
   - Primary Point of Contact Phone
   - Primary Point of Contact E-mail
   - Primary Point of Contact City
   - Primary Point of Contact State
   - Current Status (Ac ve or Inac ve)Ac va on Date
2. A user can edit the **Name, Descrip on**, and all **Primary Point of Contact** informa on.

Figure 196 - Modify an Exis ng Group Screen

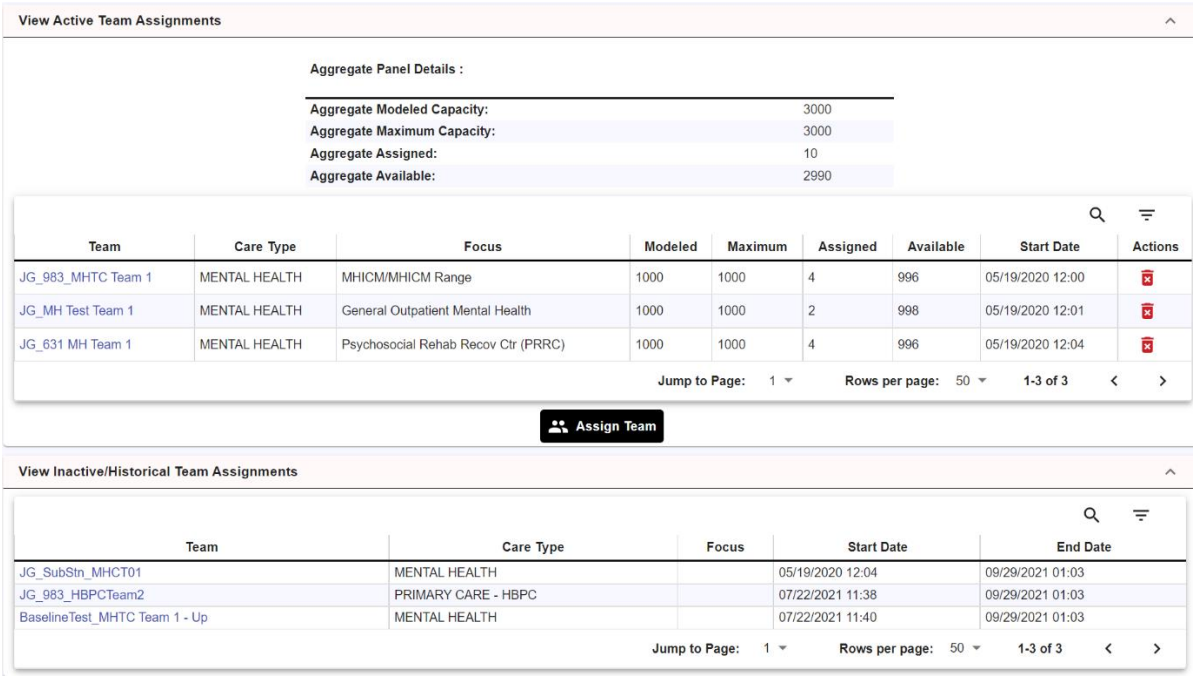


3. A user can also:

- Click the **View Ac ve Team Assignments** toggle link at the bo om of the screen to view a list of team and room assignments.
- Make new team assignments to the group by clicking **the View Ac ve Team Assignments** toggle link, and then clicking the **Assign Team** bu on.
- Click the **View Inac ve/Historical Team Assignments** toggle link at the bo om of the screen to view a list of historical data.

4. Click **Submit** to save any changes and display the *Groups List* screen. A confirma on message will appear at the top of the screen.

Figure 197 - View Ac ve Team Assignments Screen



22 Assign and Unassign a Team from a Group

A user can assign or unassign a team to or from a group in the *Modify an Exis ng Group* screen.

22.1 Assign a Team to a Group

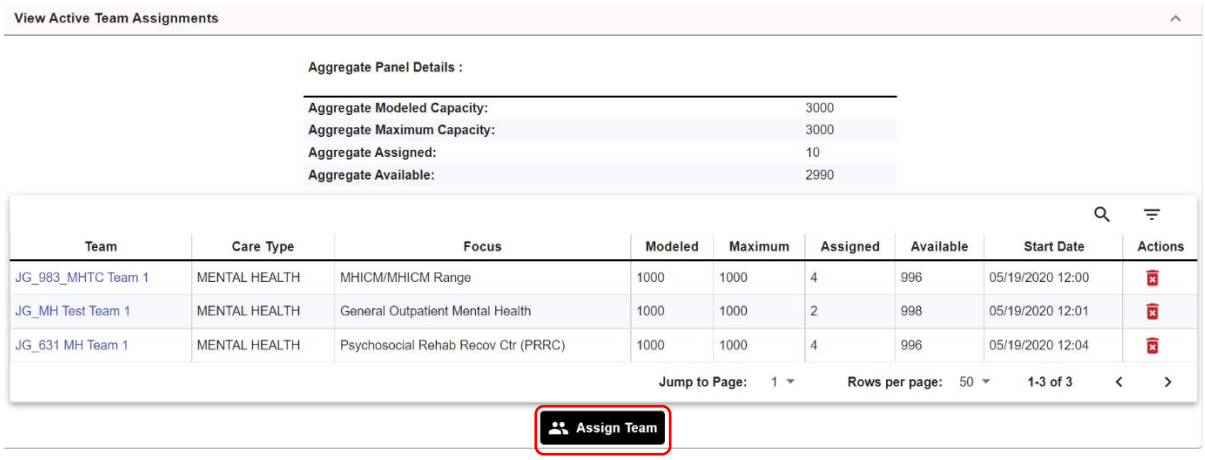
1. From the *Modify* an Exis ng Group screen for the group (See the Modify An Exis ng Group sec on), click the View Ac ve Team Assignments toggle link at the bo om of the screen to view a list of team and room assignments. The following informa on will display:
   - Aggregate Panel Details (total for the whole group)
     - Aggregate Modeled Capacity
     - Aggregate Maximum Capacity
     - Aggregate Assigned

- Aggregate Available

- Team
- Care Type
- Focus
- Sta on
- Modeled (Team Capacity)
- Maximum (number of pa ents assigned)
- Assigned (pa ents assigned to the team)
- Available (number of pa ents available to be assigned to the team)
- Assignment Start Date
- Ac ons (Use this column to unlink the team from the group assignment. See the next sec on for more informa on.)
- The list can be sorted by any column or narrowed by applying filter values for Care Type and Focus.

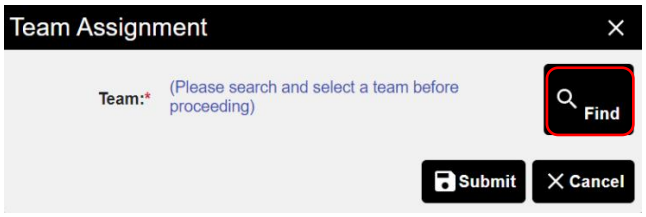
2. Click the **Assign Team** bu on to display the *Team Assignment* dialog box.

Figure 198 - Assigning a Team to a Group



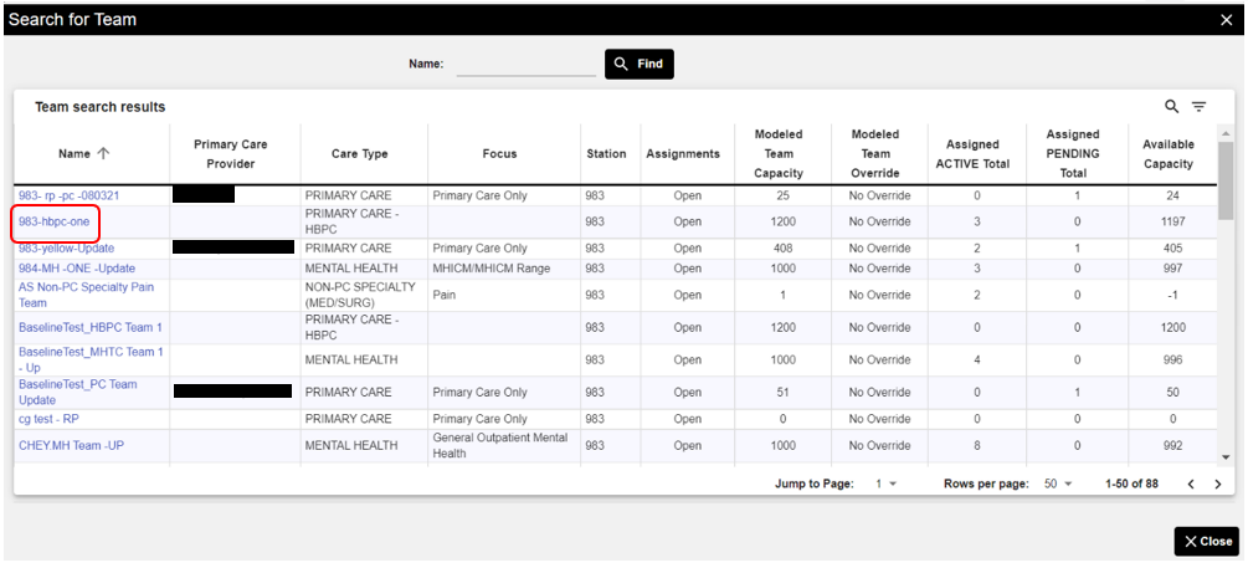
3. Click the **Search** bu on to display the *Search for Team* dialog box.

Figure 199 - Team Assignment Box with the Search Bu on Selected



4. Enter all or part of a team name and click **Search** to display a list of team names. Alterna vely, leave the field empty and click **Search** to display a list of all available team names.

Figure 200 - Search for Team Screen to Assign Team to Group



5. Click the name link to populate the *Team* field in the *Team Assignment* dialog box.

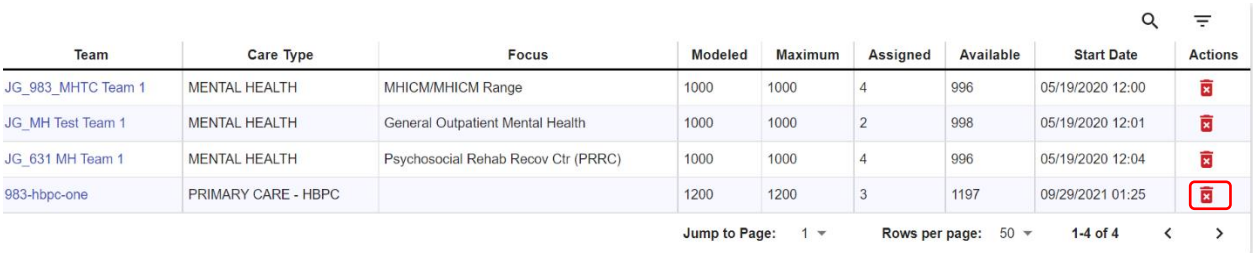
Figure 201 - Team Assignment Box with Team Selected

6. Click **Submit** to con nue, **Cancel** to cancel. A confirma on message will display at the top of the screen.

22.2 Unassign a Team from a Group

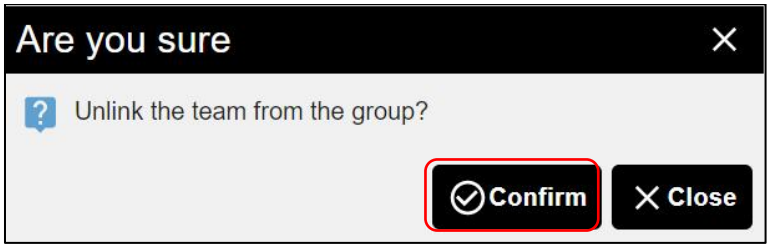
1. Click the View Ac ve Team Assignments toggle link.
2. Click the red **X** icon in the corresponding **Ac ons** column.

Figure 202 - Assigning a Team from Group



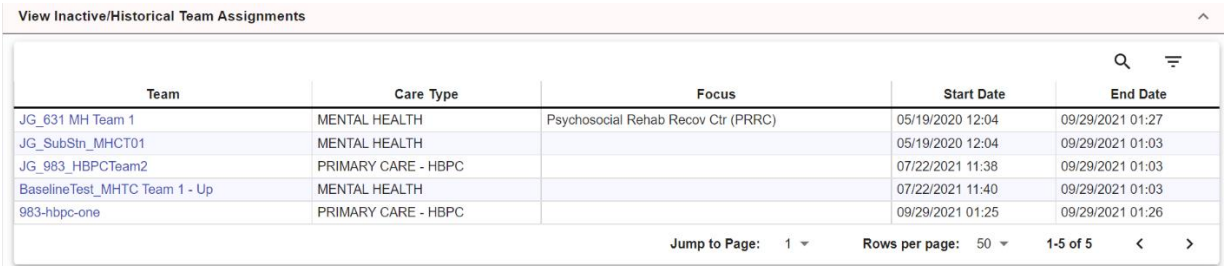
3. The *Are You Sure?* dialog box will display. Click **Confirm** to unlink the team from the group, or click **Cancel** to close the dialog box without making changes.

Figure 203 - Confirma on to Unlink Team from Group



4. Click the **View Inac ve/Historical Team Assignments** toggle link. The following informa on will be displayed:
   - Team
   - Care Type
   - Focus
   - Sta on
   - Assignment Start Date
   - Assignment End Date
   - The list can be sorted by any column.
5. The inac ve team assignment will be displayed in the list.

Figure 204 - View Inac ve/Historical Team Assignment Screen

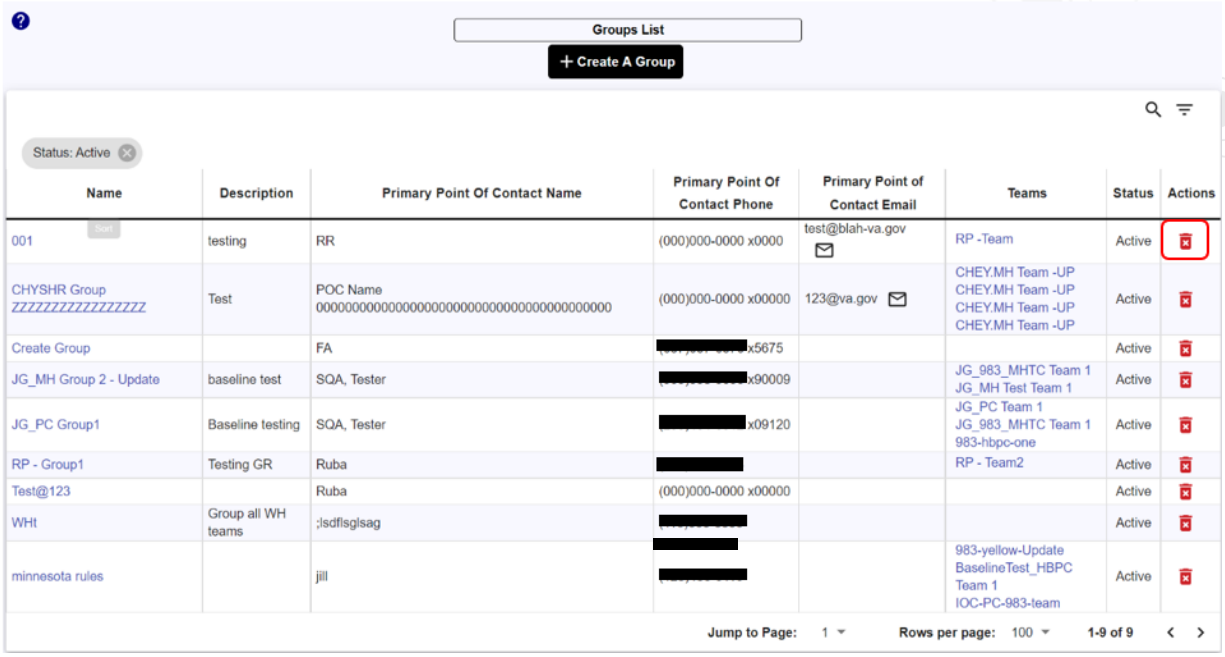


22.3 Inac vate a Group

A user can inac vate a group in the *List Groups* screen.

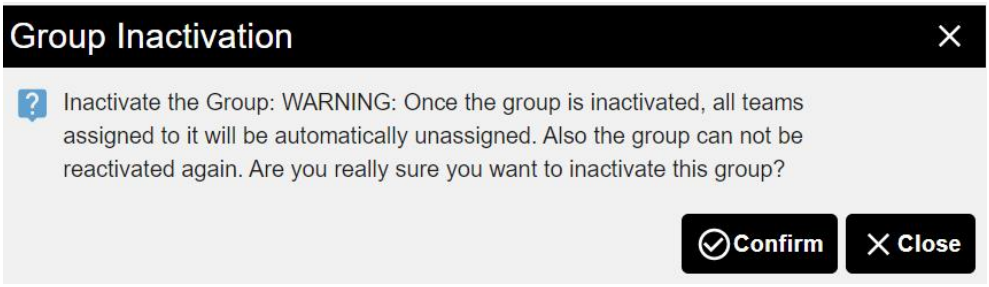
1. From the *Groups List* screen, click the icon (trash can) in the **Ac ons** column. Note that once a group is inac vated, all teams assigned to the group are unassigned from the group and the group cannot be reac vated.

Figure 205 - Group List Screen to Inac ve Group



2. The *Are You Sure?* dialog box will display. Click **Confirm** to inac vate the group, or click **Cancel** to close the dialog box without making changes.

Figure 206 - Confirma on to Inac ve Group from Team



3. The *View an Exis ng Group* screen will display, with a confirma on message and the Status listed as *Inac ve*. All values will be defaulted to zero in the *View Team Assignments* sec on.

4. Click the **View Inac ve/Historical Team Assignments** toggle link. The following informa on will be displayed:

   - Team
   - Care Type
   - Focus
   - Sta on
   - Assignment Start Date
   - Assignment End Date
   - The list can be sorted by any column.

23 Reports

23.1 Background Job Log

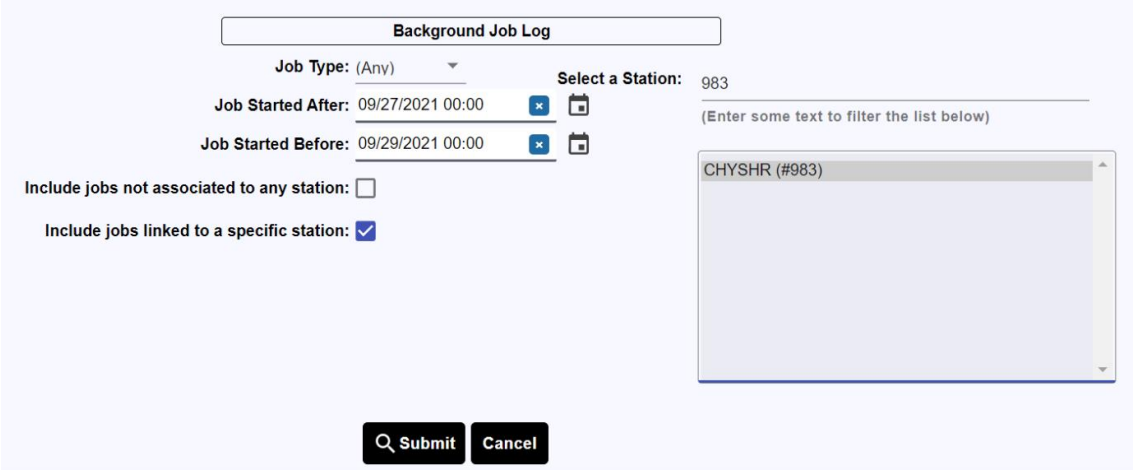
A user can search and view background job logs from this screen.

1. From the main menu, click **Reports** > **Background Job Log**. The job list will display all records associated with the sta on the user is logged into when signed in to PCMM Web.

Figure 207 - Background Job Log Menu Op on Selected

2. Use the selec on criteria to choose another query. Select:
   - **Job Type**, if desired (Any is the default, but a user can filter by CPRS Header Sync, CPRS Header Sync Monitor, Pa ent Auto-Inac va on, Pa ent Bulk Transfer, Staff Update or VistA Sync). Vista specific jobs only run for Vista mapped sta ons.
   - **Job Started A er** (Current day and me is the default)
   - Job Started Before, if desired
   - Include jobs not associated to any sta on and Include jobs linked to a specific sta on are checked by default. Uncheck if desired
   - Sta on.

Figure 208 - Background Job Log Screen



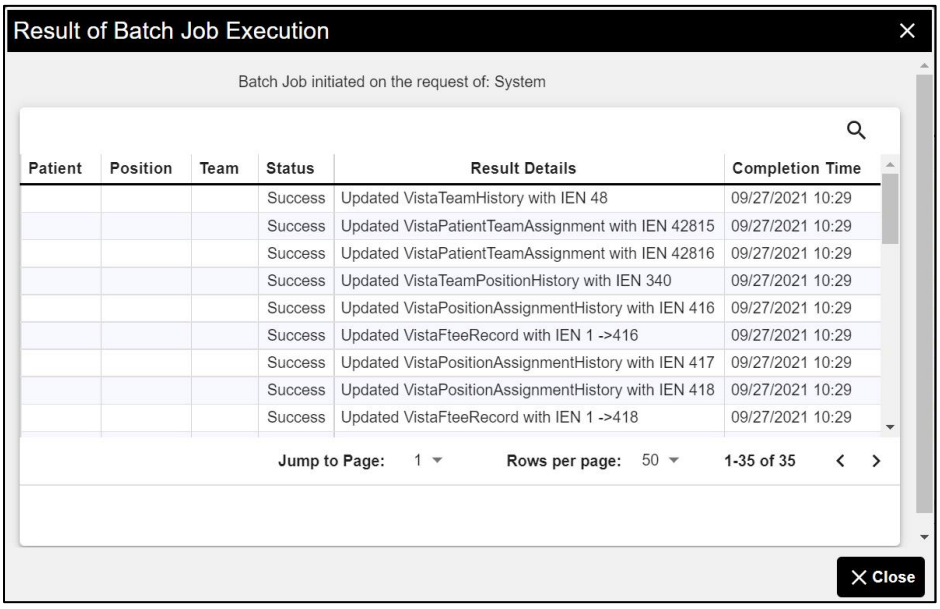
3. Click **Submit** to con nue, **Cancel** to cancel.
4. The system will display a table with the following columns:
   - Sta on

- Type
- Start Time
- End Time
- Ini ator
- Ac ons
- Filter the results by **Sta on, Type** and **Ini ator**.

Figure 209 - Sta on Table Details Screen

5. To see the details of a job, click the **View Job Results Details** icon in the Ac ons column that corresponds to the job to view.

Figure 210 - View Job Results Details Screen



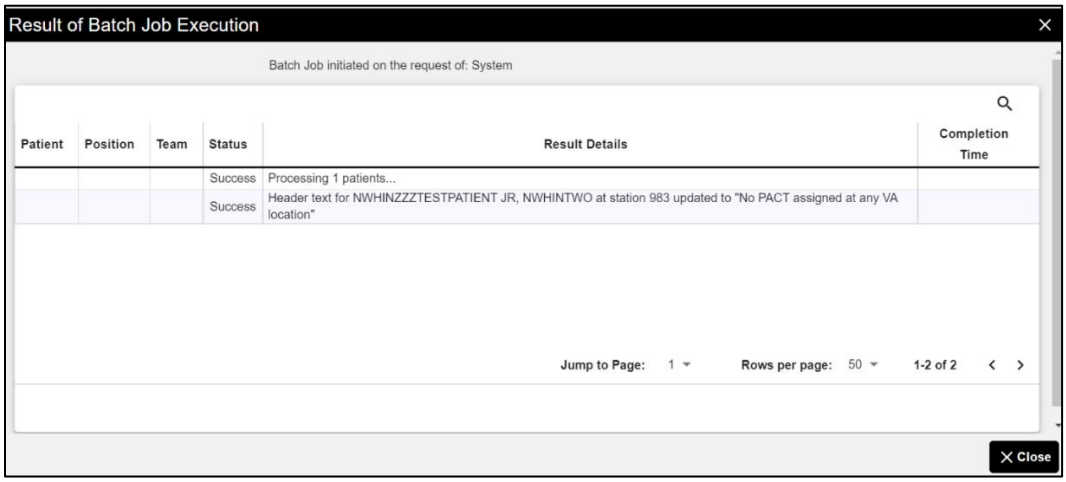
6. The Result of Batch Job Execu on screen will display with the following columns:

- Pa ent

- Posi on
- Team Status
- Result Details
- Comple on Time

7. Depending on the type of job selected, the appropriate details will display in the table.
   - The CPRS Header Sync job type will display the Pa ent name that links to Pa ent Profile screen.

Figure 211 – CPRS Header Sync Job Screen



Note: to see a pa ent's profile, click the Pa ent Profile link in the job report.

24 Canned and Ad Hoc Repor ng

24.1 Ac ve Panel Report

This report depicts the Capacity and FTE for each team and op onally each staffed team roles on each team. Note: PCMM Web uses SQL Server Repor ng Services to run PCMM Web reports. This enables reports to return results faster than having PCMM Web run reports through its own web applica on.

With the appropriate permissions, a user can run reports. If not, they will be read-only.

1. Click **Reports** > **Canned and Ad-Hoc Repor ng**. The SQL Server Repor ng Services open in a new internet browser.

Figure 212 - Canned and Ad-Hoc Repor ng Menu Op on

2. Click the **appropriate** folder view the PCMM Web reports. The following reports are:

24.2 Ac ve Panel Report

1. Select from the following SSRS parameters:
    - **Date** (required): Default to current date/ me, or enter in text box or choose from calendar control). If applicable, the informa on for the report will display everything on record through the specified date and me.
    - **Report level:** (required): Default to sta on, but can choose from Na onal, VISN, or sta on. For sta ons, a user can choose Posi on Detail.
    - **Care Type** (required): Default is All
    - Focus
2. The following fields will be displayed:
    - Sta on
    - Team
        - Care Type/Focus
        - Name
            - **Posit**ion**(s)** (Note: Only display this field when "Include Posi on Detail" check box is selected
        - **Team Status** (Indicator for Team)
    - Capacity
        - **Allowed** (Total Number of Pa ents Allowed for each ac ve team role on the team)
        - **Assigned** (Total Number of Pa ents with current ac ve assignment to the team)
        - **Available** (Pa ent allowed minus pa ent assigned)
        - **U liza on** (Pa ent assigned divided by pa ent allowed mes 100 = percentage)
    - FTE
        - **Expected** (Total expected FTE for each ac ve team role on the team)
        - **Actual** (Total actual FTE captured for each ac ve staff assignment to each ac ve team role on a team)
        - **U liza on** (Actual FTE divided by expected FTE divided by 100 = percentage)
3. Include Posi on Detail
    - If the **Include Posi on Detail** box is checked, all ac ve team roles with ac ve staff assignments will be displayed.

- This op on provides the capacity and FTE for all the ac ve posi ons with the ac ve staff assignments for each team included in the report and will be listed under the Team Name. (Ex. Staff Name - Posi on Assignment)
- The data for the assigned capacity and FTE associated with each team role can be retrieved from the following screens:
    - Posi on Profile (Allowed Pa ents, Assigned Pa ents, Available Pa ents, Expected FTE)
    - Show Staff (Actual FTE)
- The *Posi on Detail* will be listed in the following order:
    - PCP, if applicable (If there is an ac ve preceptor on team; search for Preceptor but display as PCP)
    - AP(s), if applicable (If there are any ac ve preceptees for team; search for *Preceptee* but display as AP
    - If Preceptor/Preceptees are listed; then a *Subtotal* row will be provided for the assignments of PCP/AP for capacity and FTE.
    - Care Manager
    - Clinical Associate (Clinical Assc)
    - Administra ve Associate (Admin Assc)
    - Any addi onal ac ve team roles with staff assignments will be listed.

24.3 Pending Pa ent Assignment Report

This report determines how long PACT assignments took to ac vate. This report displays all pa ent assignments to teams with a care type of "Primary Care" that have a "Pending" status. The items reported include:

- Pending Assignments to Primary Care Teams.
- Canceled Assignments to Primary Care Teams.

1. Select from the following SSRS parameters:

Report Type: Detail

Target Audience: VISN and Principal Facility PCMM Coordinators

Update Frequency: This report extracts data from PCMM Web and is generated in real me.

Parameters to be included: Number of pending, ac ve and cancelled pa ents by Na onal, VISN, facility, and divisions.

VISN: All VISNs the user is authorized to view are displayed. User selects the VISN(s) to include on the report.

Sta on: All Sta ons for the selected VISN(s) are displayed. User selects the Sta on(s) to include on the report.

Division: All Divisions for the selected Sta on(s) are displayed. User selects the Division(s) to include on the report.

Focus: All Focuses are displayed. User selected Focus(s) to include on the report.

Current Assignment Status: User selects Canceled or Pending or Both.

Data Columns:

- VISN #
- Sta on #
- Focus
- Current Assignment Status

 # Days Pending: The number of days the pa ent's PACT team assignment has a PENDING status since assigned to the PACT team.

MPACT: The overall status of a MPACT Request will display in the report if a MPACT Request is associated with a PACT team assignment for a pa ent.

Team Name: The name of the assigned PACT team.

PCP Name: The name of the primary care provider the pa ent is assigned to on the PACT team.

Assignment Start Date: The date and me the pa ent was originally assigned to the PACT team.

Assignment End Date: The date and me the pa ent was unassigned from the PACT team.

Unassign Reason: The reason for unassignment.

Pa ent Name – Includes the last name, first name, and middle name of the pa ent. This may be restricted to some users.

Pa ent SSN – Includes the Social Security Number of the pa ent. This may be restricted to some users.

25 Alerts And No fica ons

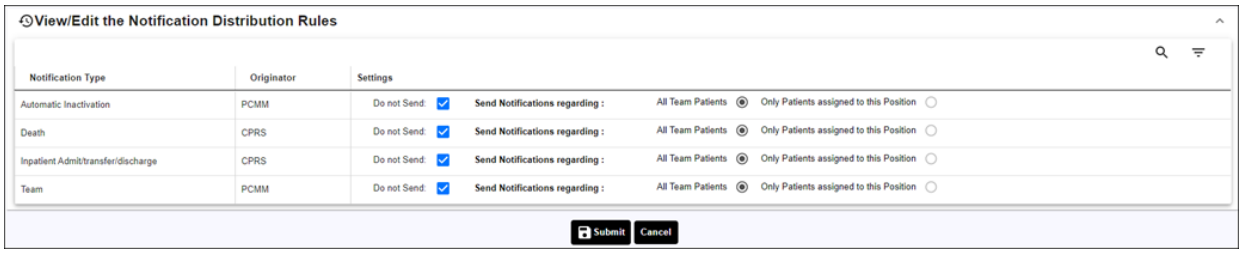
Alerts and no fica ons are used for efficiently communicate tasks and informa on to users within the PCMM Web applica on. **No fica ons** are system generated messages that is assigned to a team or a user when a when a death, transfer, inac va on, or a team change occurs and no further ac on is required. **Alerts** are system generated message assigned to a user to take ac on within PCMM Web, or outside of the applica on. These alerts are sent to the PCMM Coordinator and/or PCMM TVC.

25.1 Manage Team and Team Role (Posi on) No fica ons

For teams at Vista mapped sta ons, PCMM Web will generate VistA mailman messages to team members when certain assignment/unassignment ac vity occurs. If needed, a user has the ability to select which no fica on(s) are received by which team member(s) on both the *Team Profile* and *Team Posi on Profile* screens.

1. Once the **View/Edit the No fica on Distribu on Rules** link is expanded, select **PCMM** or **CPRS** from the **Filter** drop-down list to filter the list by Originator se ngs.
2. Select the **Do Not Send** check boxes next to the no fica ons that are not sent to the team (all no fica on types selected by default). No fica on Types are:
   - Death
   - Inpa ent Admit/Transfer/Discharge
   - Automa c Inac va on
   - Team

Figure 213 - No fica ons List Screen



3. Click **Submit** to save any changes. A message will appear at the top of the screen to indicate team changes were saved successfully.
   - If a no fica on is deselected, select either:
     - **All Team Pa ents** (to send no fica ons regarding all team pa ents), or
     - **Only Pa ents assigned to this Posi on** (to send no fica ons regarding just pa ents assigned to the team role).

» **Note:** Users may use the filters above and below the table to restrict or expand the number of rules shown.

25.2 Manage Alerts

There are two types of alerts:

- **Ac onable** - requires ac on on behalf of a user.
- **Informa onal** - for informa on purposes only.

25.2.1Ac onable Alerts

Staff:

- PCMM Coordinator receives an alert when a Staff Member has a Termina on Date.
- PCMM Coordinator receives an alert when the person class for the staff has changed and is no longer valid for the team role.

Auto-Inac va on:

- PCMM Coordinator receives an alert when Pa ent Scheduled for Inac va on.

MVI ICN:

- PCMM Coordinator receives an alert when a pa ent was moved via MVI ICN mismatch process (Surviving/Deprecated).
- PCMM Coordinator receives an alert when the pa ent and all his assignments were merged due to duplica on. (Surviving/Deprecated).

Mul PACT Request:

- Local TVC receives an alert for approval/reason entry of a pending PACT assignment at local sta on.
- All TVC(s) at the sta on(s) listed in the "Required PACT Approvers" sec on receives an alert requiring approval/denial.
- Only TVC(s) at sta ons that have not responded to the request receives the resent alert.
- Alert is sent to all PCMM Coordinator(s) on the request to unassign a pa ent from the sta on(s) PACT team when a Permanent Reloca on has been completed and a request has been withdrawn.

Informa onal Alerts:

Team Configura on:

- PCMM Coordinator receives an alert when one or more team roles were created/updated by applying a model team template.
- PCMM Coordinator receives an alert when a model that may apply to this team has been updated.

Batch Job Execu on:

- PCMM Coordinator and the user receive an alert when a batch process to historical assign, unassign, or transfer pa ents between team roles was completed.

Auto-Inac va on:

- PCMM Coordinator receives an alert when:
    - Pa ent Automa cally Inac vated due to Death Entry
    - Pa ent Automa cally Inac vated due to Inac vity

- Pa ent Automa cally Reac vated due to Death Entry Revoca on

Panel Placement Request:

- PCMM Coordinator at site genera ng the request and the PCMM Coordinator at the site listed on the request receives alert when a Panel Placement Request was created or updated.

Mul PACT Request:

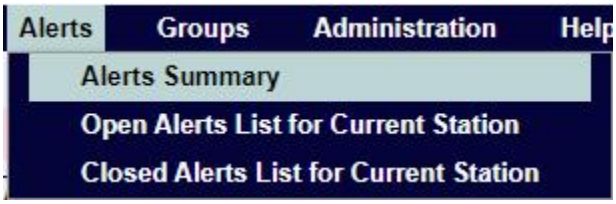
- All TVC(s) and PCMM Coordinator(s) at all sta ons listed in the "Required PACT Approvers" receive an alert for the overall status of the request. (Approved/Denied/Withdrawn).
- All TVC(s) and PCMM Coordinator(s) at all sta ons receive the denial alert with the excep on of the sta on that just denied it.
- All TVCs and PCMM Coordinators on the request receive an alert when request is Withdrawn or Auto Canceled due to iden ty issues.
- Escala on alert is sent to the sta on TVC who has not taken ac on on the request within 15 days.
- Escala on alert is sent to the VISN TVC when the sta on TVC has not taken ac on on the request within 30 days.
- Escala on alert is sent to the Na onal PCMM Coordinator if no ac on is taken on the Mul PACT request within 45 days.

25.3 View Alerts Summary for a Sta on

The Alerts Summary displays a summary of all available alerts from all authorized sta ons that the user is assigned. Only sta ons that have alerts available for viewing will be displayed.

1. From the PCMM Web Home Page, click the **Alerts** menu and select **Alerts Summary** to display the *Alerts Summary* screen.

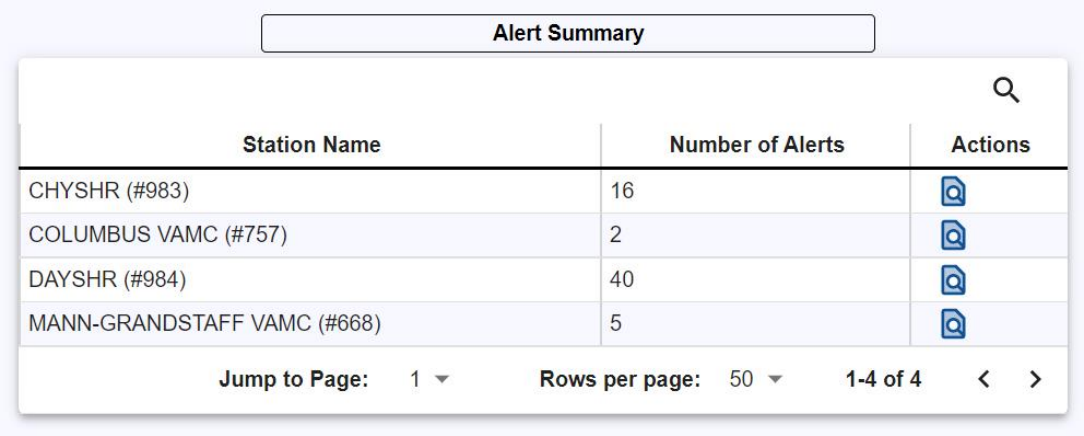
Figure 214 - Alerts Summary Menu Op on Selected



2. If any alerts are pending, a no ce box in the top right side of the PCMM Web home page will display. Click the link to display the *Alerts Summary* screen.
3. The *Alerts Summary* screen provides the following alert informa on:
   - The sta on name and number.
   - The number of alerts for each sta on listed.

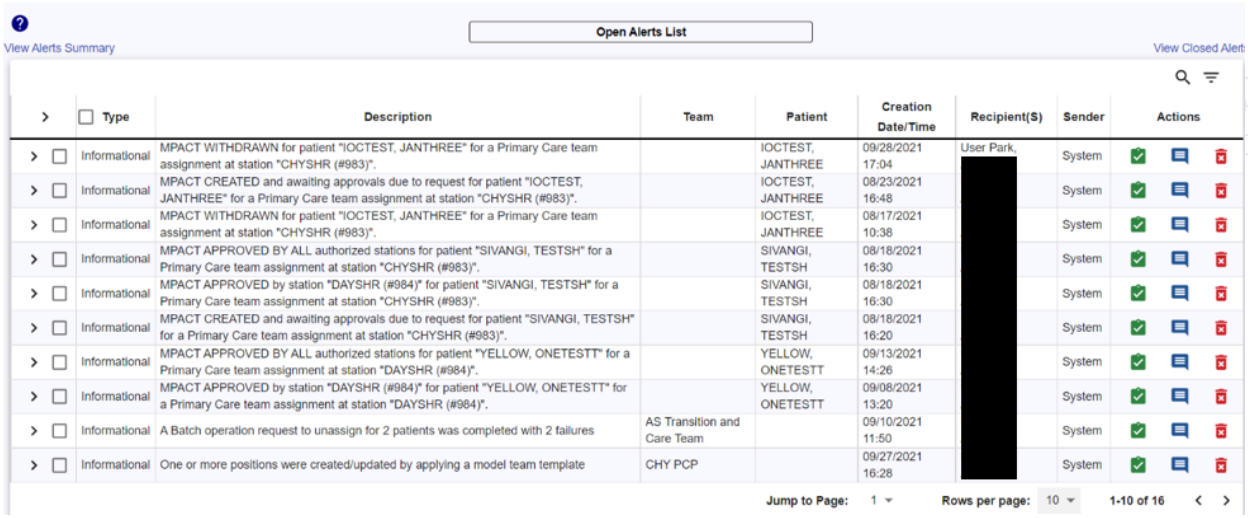
- A user can use the **First, Previous, Next,** and **Last** bu ons to navigate the list of alerts.
- Display the number of rows shown by selec ng a number from the ***Display Records*** drop-down menu.

Figure 215 - Alert Summary Screen



4. To view the alert details for each message, click the icon in the **View** column. The *Open Alerts List* screen will display.
   - **Note:** If selec ng a different sta on, the system will automa cally change the sta on for the user and allow them to view the alerts. The user will receive a message sta ng that the sta on has been changed once a sta on has been selected.
5. The *Open Alerts Lists* screen will display all of the Ac onable and Informa onal alerts available for the user.
6. For each alert with an Alert Type of *Informa onal*:
   - One alert will be sent to each user who holds the security role defined as an **Alert Recipient**. Each user will be responsible for managing their own Informa onal alerts. If the specific alert does not exist for the user; it will be created. If the specific alert already exists for the user; another alert will not be created (i.e. the user will not see two of the exact same alerts).
7. For each alert with an Alert Type of *Ac onable*:
   - One alert will be sent to each user who holds the security role defined as an **Alert Recipient**. The ac onable alert will then be closed and removed from each user's alert list who received the alert.

Figure 216 - Open Alerts List Screen

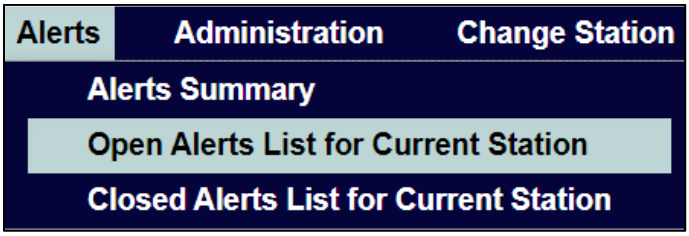


25.4 Open Alerts List for a Current Sta on

A user can view and update all open alerts for a sta on.

1. From the PCMM Web Home Screen, click the **Alerts** menu and select **Open Alerts List for Current Sta on** to display the *Open Alerts List* screen.

Figure 217 - Open Alerts List for Current Sta on Menu Op on



2. A user can perform the following func ons on the *Open Alerts List* screen:
   - Click the **View Alert Summary** link to view the summary of alerts all assigned sta on.
   - Click the **View Closed Alerts** link to view all closed alerts for the sta on.
   - Click the **+** symbol in the header to show all comments for all alerts in the list.
   - Click the **+** symbol next to an alert to view comments only for that alert.
   - To delete an alert, select the check box next to the alert or select the **All** check box to delete all alerts on the screen. Click the **Delete** bu on.
   - Sort by *Ac onable* and *Informa onal* alerts by using the filter drop-down list above the **Type** column.
   - Sort by system using the filter drop-down list above the **Sender** column.
   - Sort all other columns using the arrow icons. The default lis ng order is by *Requires Ac on* type and by date and me.

- Use the **First, Previous, Next,** and **Last** bu ons to navigate the list of alerts.
- Change the number of rows shown by selec ng a new number from the **Display Records** drop-down list.

25.5 Upda ng an Alert

1. Click the **View/Ac on on Alerts** icon in the **Ac ons** column to display the appropriate screen that the alert was generated from.
2. A message displays at the top of the screen with two links. Click the **Save for Later** link to save the alert in the *Open Alerts List Alert* screen. Click the **Mark as Complete** link to mark the alert as complete and move the alert to the Closed Alerts List.
   - **Note:** The message will remain visible on the screen un l the user completes one of the ac ons. If the user navigates away from screen, the same message will display on the next screen un l ac on is taken.

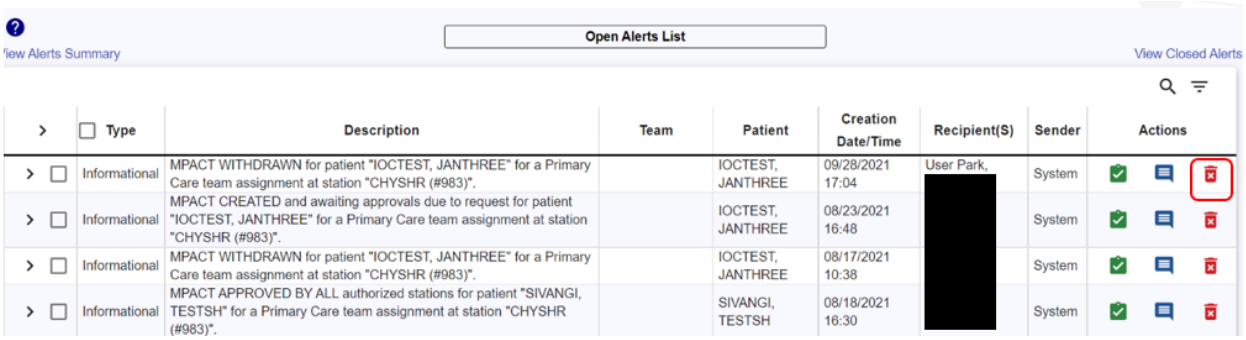
25.6 Adding Comments to an Alert:

1. Click the **Update Comments** icon in the **Ac ons** column to display the **Enter a Comment** dialog box.
2. Enter the necessary informa on and click **Submit** to save a comment or **Cancel** to return to the *Open Alerts List* screen without saving the comment.
3. The Comment is now a ached to the alert and can be viewed when the user clicks the expand plus sign on the le of the alert.

25.7 Dele ng an Alert

1. Click the **Delete Alert** icon in the **Ac ons** column to display a dialog box to either confirm or cancel the dele on.

Figure 218 - Dele ng or Adding Comments to an Alert



25.8 View Closed Alerts List for a Current Sta on

A user can view all the closed alerts and alerts marked as complete for the sta on. The alert is never deleted and a historical record is kept in the system. The Alert table displays the user that closed the alert and the date and me of that ac on. No further ac on can be made to closed alerts.

1. From the PCMM Web Home Screen, click the **Alerts** menu and select **Closed Alerts List for Current Sta on** to display the *Closed Alerts List* screen.

Figure 219 - Closed Alerts List for Current Sta on Menu Selec on

A user can perform the following func ons on the *Closed Alerts List* screen:

- Click the **View Alert Summary** link to view the summary of alerts all assigned sta on.
- Click the **View Open Alerts** link to view open alerts a sta on.
- Click the **+** symbol in the header to show all comments for all alerts in the list.
- Click the **+** symbol next to an alert to view any comments only for that alert.
- Sort by Ac onable and Informa onal alerts by using the filter drop-down list above the **Type** column.
- Sort by system using the filter drop-down list above the **Sender** column.
- Sort all other columns using the arrow icons.
- Change the number of rows shown by selec ng a number from the **Display Records** drop-down menu.
- Send an email to the user who closed the alert by clicking the envelope icon next to their tle.

25.9 Result of Batch Job Execu on

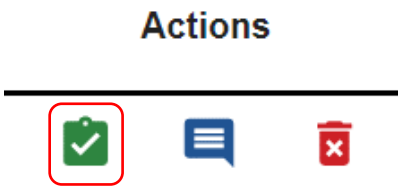
Once a batch process is submi ed, a user will be no fied that the batch job is complete. A use can then view the alert and addi onal details in the *Batch Execu on Results* screen.

1. From the Alerts drop-down menu, select **Open Alerts List for Current Sta on** to display the Open Alerts List screen. Alterna vely, any alerts pending display in the no ce box in the top right side of the PCMM Web home page. This no ce provides a link to the Alerts Summary screen.

Figure 220 - Open Alerts List for Current Sta on Menu Op on

2. Select the **View/Ac on on Alerts** icon in the **Ac ons** column to display the *Result of Batch Job Execu on* screen.

Figure 221 - Selec ng Ac ons Icon to View Results of Batch Job Execu on



3. View the list of batch results for each pa ent. A user can filter the list using the controls next to each heading.

26 Administra on

26.1 Performing Administra ve Tasks

Administrators have the ability to manage various tasks. They can do the following:

- Manage the permissions se ngs that drive the ac vi es a par cular system user can perform.
- Assign administra ve and func onal sta ons to a system user within their own sta on.
- Manage the users under their own area or those of areas under their responsibility.

Local Administrators can assign sta ons to a system user within their own sta on. Each PCMM Web user must have VistA privileges for each specific division at vista mapped sta on they need to access per 5 digit sta on level. Access to a main facility (i.e., 3 digit sta on level) will only provide access to the main facility data.

Regional and Na onal Administrators have a larger pool of sta ons available to them for assignment of users. This is helpful when a system user is an Occupa onal Health (OH) provider at mul ple facili es.

27 Manage and Modify Reference Data

A PCMM Web Na onal Administrator is able to view and manage the data on the drop-down lists within the PCMM Web applica on, so that the selec on list of values will not require modifica on by developers and will be available immediately.

27.1 Manage Reference Data

1. From the **Administra on** drop-down menu, select **Manage Reference Data** to display the *Manage Reference Data* screen.
2. Select a reference type from the **Reference** drop-down list and click **View** to display a list of data.
3. Click a name link in the **Name** column to display the *Modify Reference Data* screen. The Modify Reference Data screen will display the Care Type and Focus data, while the Manage Reference Data screen will display for the Non-VA Provider Role choice.
4. Enter/change the following informa on:

- Name
- Descrip on
- Sort Order
- Jus fica on
- Check the box to inac vate the data record, if desired. An **Inac vate Reason** will be required to save the record. If the record is an exis ng record, the Code cannot be changed

5. Click **Submit/Confirm** to save, **Cancel/Confirm** to exit without saving changes and return to the *Manage Reference Data* screen.
6. A user also has the op on of selec ng another reference type to display. Select another choice from the **Reference: Type** drop-down list and click **View**.

27.2 Add a New Value

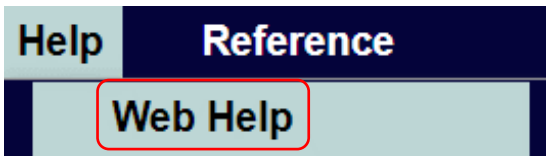
1. Add a new value by clicking the **Add New Value** bu on. The Add Reference Data screen will show. Enter:
   - Code (required)
   - Name (required)
   - Descrip on (required)
   - Sort Order
   - Jus fica on
   - Inac vate (this can be used to ini ally inac vate, enter the data and ac vate at a later date)
   - If Inac vate is chosen, an Inac vate Reason text box will display. Enter a reason.
2. Click to **Submit** and save changes, or **Cancel** to cancel.

28 Help File

A user can view the PCMM Web Help from the Help Menu for step-by-step procedures on how to assign a team, assign a pa ent to a profile, update a team role, and more. Addi onally, helpful hints and informa on about the applica on is available in the help file.

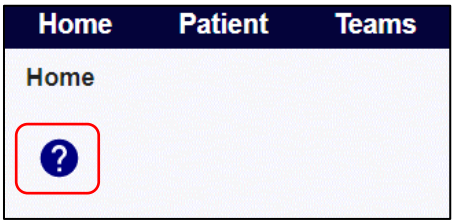
1. *Select **Help** > **Web Help** from the main menu to display the PCMM Web Help File.*

Figure 222 - Web Help Icon Selected



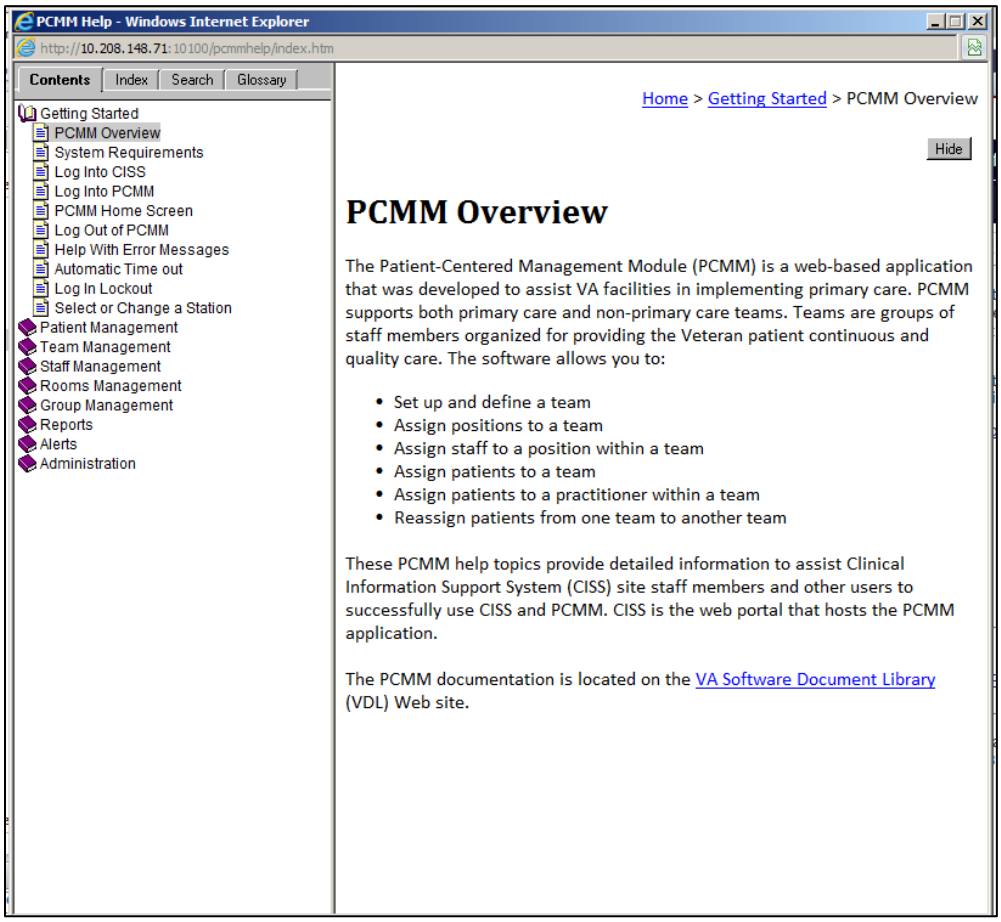
- ***Note:*** *The PCMM help file is also launched by click the icon and is available on the upper le side of the screen, below the Main Menu and bread crumb links.*

Figure 223 - Help Icon in PCMM Web



2. A user can view the following informa on by clicking on the Table of Contents icon.

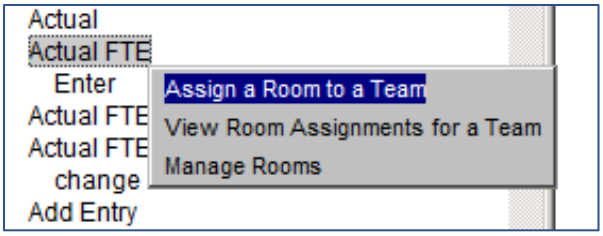
Figure 224 - PCMM Web Help File



1. In the PCMM Web Help File, users can search for a specific topic or subject by selec ng the Index, Search, and Glossary tabs.

   - **Index** – Lists keywords alphabe cal. Click the **keyword** to display a pop-up menu of topics related to the selected keyword. Select the topic to view addi onal informa on.

Figure 225 - Index in PCMM Web Help File

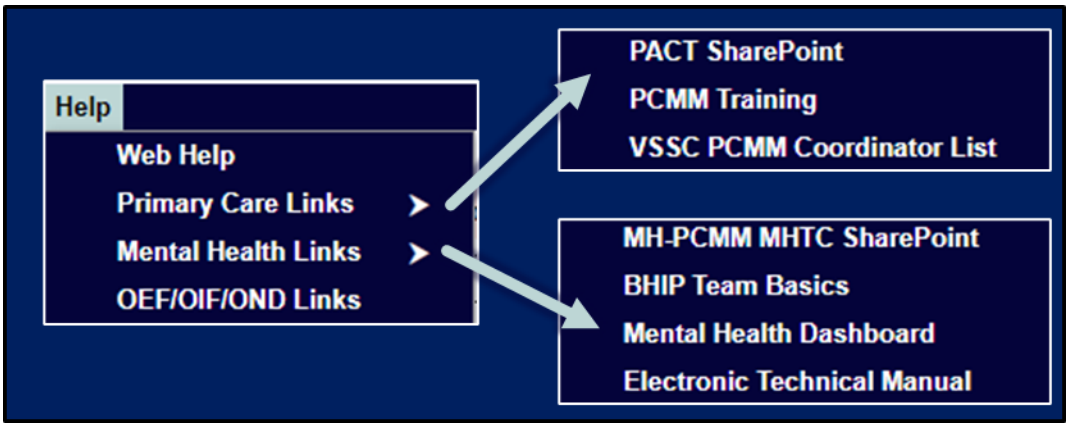


- Search – Enables a user to search for a topic by entering the keyword. All topics with the keyword display, according to rank.
- Glossary – Lists glossary terms alphabe cal.

29 Help Menu

The Reference Menu provides a user with easy access to important links, policies and procedures, and other publica ons directly from PCMM Web.

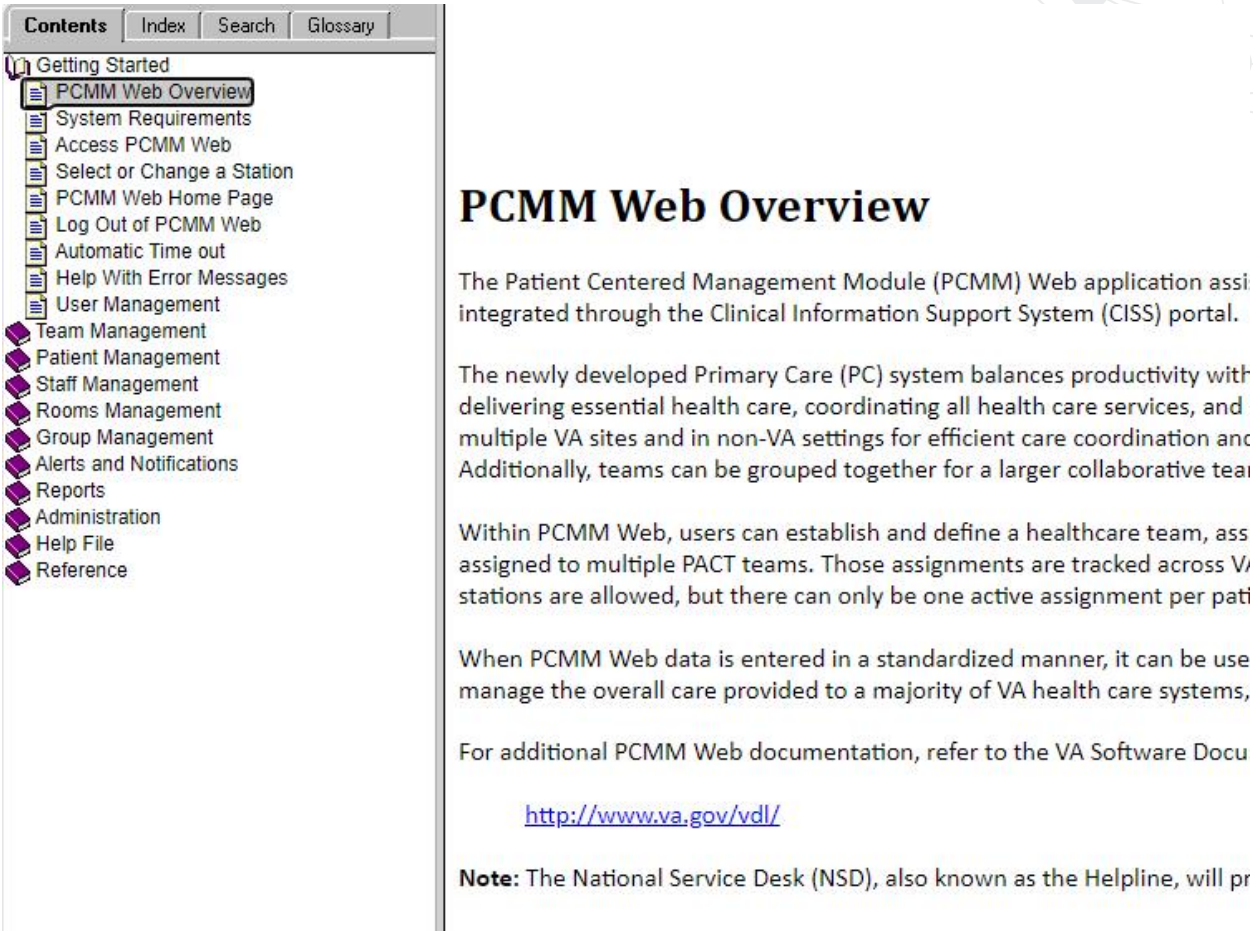
Figure 226 - Help Menu and possible selec ons



29.1 Web Help

This selec on will open the PCMM Help File. This resource is able to answer many ques ons of the func ons within PCMM.

Figure 227 - PCMM Web Help



29.2 Primary Care Links

1. *Select **Help > Primary Care Links** > **PACT SharePoint** from the main menu to display the PACT SharePoint site.*

   - The SharePoint site provides helpful resources to implement the Pa ent Aligned Care Team (PACT) at your local facility.

2. *Select **Help > Primary Care Links** > **PCMM Training** from the main menu to display the Primary Care Management Module (PCMM) Training Home page.*

   - The PCMM Training page provides links to training material and informa on related to PCMM.

3. *Select **Help > Primary Care Links** > **VSSC PCMM Coordinator List** from the main menu to display the Na onal PCMM Coordinator & Referral Case Manager List.*

   - The *Na onal PCMM Coordinator & Referral Case Manager List* provides a list of PCMM VA facili es and coordinators.

29.3 Mental Health Links

1. *Select **Help > Mental Health Links** from the main menu to display the Mental Health Services Training Resources SharePoint site.*
   - The SharePoint site provides helpful resources to implement the related Mental Health PCMM.
2. *Select **Help > Mental Health Links** > **BHIP Team Basics** from the main menu to display the Behavioral Health Interdisciplinary Program Teams page.*
   - The BHIP page provides tools to help build Collabora ve Teams, Veteran Centered Care, and Care Coordina on and Access related to mental health care for Veterans.
3. *Select **Help** > **Mental Health Links > Mental Health Dashboard** from the main menu to display the Mental Health Dashboard report page.*
   - The Mental Health Dashboard includes a report summary and stats for several VA facili es.
4. *Select **Help** > **Mental Health Links > Electronic Technical Manual** from the main menu to display the Electronic Technical Manual.*

29.4 Troubleshoo ng

If screen display issues occur when working in PCMM Web, enable Compa bility Mode in the browser. This issue may occur in Internet Explorer browsers. To manually enable the se ng, open PCMM in Internet Explorer and click the Tools bu on and then click Compa bility **View** se ngs. Under Add this website, enter the PCMM Web URL site to add to the list and click **Add**.

29.5 User Roles

The following are the available roles to assign a user in PCMM Web.

Table 4 - User Roles, Descrip ons, and Permissions

Role	Description
PCMM Coordinator	Able to utilize all functionality to create, manage and assign to any PCMM team.
PCMM MH Coordinator	Able to utilize all functionality to create, manage and assign to MHTC PCMM teams only.
PCMM MultiPCP Clinical Approver	Clinicians currently and potentially caring for the patient or their clinical designee responsible for determining whether there is compelling clinical need for Multi-PACT assignments.
PCMM Specialty Coordinator	Responsible for Non-PACT PCMM management, setup and patient assignments.
PACT Administrator – Limited View	Able to view all areas within the application except for patient level data

PACT Administrator – View All	Able to view all areas within the application including patient level data.
PCMM Clerk	The role assigned for staff members who performs data entry tasks.
PCMM MH Clerk	The role assigned for staff members who performs data entry tasks for MH teams only.
PCMM Reports Only	User access to PCMM reports only
PCMM Specialty Clerk	The role assigned for staff members who performs data entry tasks for Non PACT areas only.
PCMM Traveling Veteran Coordinator	Facilitates PCMM Multi-PACT requests while acting as the liaison between sending/receiving facilities for traveling veterans needing care coordination and communicates with the TVC at the other facility to obtain/send information.
PCMM Back-up Traveling Veteran Coordinator	Serves as the back-up to the TVC
PCMM VISN Coordinator	This designated staff member serves as the VISN's PCMM technical expert with the ability to utilize and troubleshoot all areas of the application and has the ability to access and delegate PCMM user permissions and necessary user training.
PCMM VISN Traveling Veteran Coordinator	Serves as the VISN TVC SME with the ability to act on the VISN's facilities PCMM Multi-PACT requests as needed.
PCMM Backup Principal Facility Coordinator	Serves as the back up to the Principal Facility Coordinator
PCMM Principal Facility Coordinator	There is one PCMM Principal Facility Coordinator for each station (parent station and divisions). This designated staff member serves as the facility's PCMM technical expert with the ability to utilize and troubleshoot all areas of the application and has the ability to access and delegate PCMM user permissions and necessary user training.

Table 5 - Detailed Role Table

	PCMM Na onal Coord.	PCMM VISN Coord.	PCMM Principal Facility Coord.	PCMM Coord.	PCMM Clerk	PCMM VISN Traveling Veteran Coord.	PCMM Traveling Veteran Coord.	PCMM MH Na onal Coord.	PCMM MH Coord.	PCMM MH Clerk	PCMM Specialty Coord.	PCMM Specialty Clerk
Pa ent Management												
Assign Pa ent to PC	x	x	x	x	x							
Assign Pa ent to MH	x	x	x					x	x	x		
Assign Pa ent to Spec	x	x	x								x	x
Assign Pa ent to NVA Care	x	x	x									
View Pa ent	x	x	x	x	x	x	x	x	x	x	x	x
Team Management												
Create PC Teams	x	x	x	x								
Update PC Teams	x	x	x	x								
Delete PC Teams				x								
Create MH Teams	x	x	x					x	x			
Update MH Teams	x	x	x					x	x			
Delete MH Teams								x	x			
Create Spec Teams	x	x	x								x	
Update Spec Teams	x	x	x								x	
Delete Spec Teams											x	
Create NVA Care Teams	x	x	x									
Update NVA Care Teams	x	x	x									
Delete NVA Care Teams												
View Teams	x	x	x	x	x	x	x	x	x	x	x	x
Room Management												
Create Rooms	x	x	x	x								
Update Rooms	x	x	x	x								
View Rooms	x	x	x	x								
Assign Rooms	x	x	x	x								
Group Management												
Create Groups	x	x	x	x								
Update Groups	x	x	x	x								
View Groups	x	x	x	x								
Assign Groups	x	x	x	x								
Model Configura on												
Create Models	x	x										
Update Models	x	x										
Delete Models	x	x										
View Models	x	x		x	x							

	PCMM Na onal Coord.	PCMM VISN Coord.	PCMM Principal Facility Coord.	PCMM Coord.	PCMM Clerk	PCMM VISN Traveling Veteran Coord.	PCMM Traveling Veteran Coord.	PCMM MH Na onal Coord.	PCMM MH Coord.	PCMM MH Clerk	PCMM Specialty Coord.	PCMM Specialty Clerk
Non-VA Provider												
Create NVA Provider	x		x	x	x		x	x	x		x	
Update NVA Provider	x		x	x	x		x	x	x		x	
Assign NVA Provider	x		x	x	x		x	x	x		x	
View NVA Provider	x	x	x	x	x	x	x	x	x	x	x	x
Manage Reference Data												
Create Reference Data	x											
View Reference Data	x											
Update Reference Data	x											
Delete Reference Data	x											
Reports	x	x	x	x	x	x	x	x	x	x	x	x
User Management	x	x	x					x				

Table 6 - Detailed Care Type Table

	PCMM National Coord.	PCMM VISN Coord.	PCMM Principal Facility Coord.	PCMM Coord.	PCMM Clerk	PCMM MH National Coord.	PCMM MH Coord.	PCMM MH Clerk	PCMM Specialty Coord.	PCMM Specialty Clerk	PCMM Non-VA Care Coord.
Primary Care	x	x	x	x	x						
Primary Care - HBPC	x	x	x	x	x						
Case Management	x	x	x						x	x	
Community Care	x	x	x						x	x	
Inpatient SCI	x	x	x						x	x	
Mental Health	x	x	x			x	x	x			
Non-PC Specialty (Med/Surg)	x	x	x						x	x	
Non-VA Care	x	x	x								x
Transition and Care Management	x	x	x						x	x	

Table 7 - Team Roles within PCMM

Glossary

A

ACOS: Associate Chief of Staff.

Admin Coordinator: The administra ve coordinator for Primary Care and Non-Primary Care Teams. This person is involved with administra ve (MAS requirements and/or Clinic Administra on) du es as well as oversight of the Scheduling process and Primary Care team defini on.

Alerts: Alerts are system-generated messages that provide informa on. Alerts are either Informa onal or Ac onable. A user must have the appropriate security access to view alerts.

Arrow: Arrow is a symbol that is used to scroll up and down lists, and le to right for moving objects (pa ent names, e.g.).

Associate Provider: An Associate Provider is authorized to provide primary care, but cannot act as a Primary Care Provider. In PCMM, a Resident is designated as an Associate Provider. A Nurse Prac oner and/or Physician Assistant may be designated as an Associate Provider also. Per VHA Direc ve every pa ent is to be assigned to a Primary Care Provider, who is responsible for coordina ng a pa ent's overall care. Thus, the Associate Provider on a Primary Care Team must be assigned to a preceptor who can be a Primary Care Provider (must have a Primary Care Provider preceptor assigned to them).

Aus n Automa on Center: The central repository for Na onal Care Pa ent Care Database.

Auto Team Enrollment/Discharge: This is an op on when se ng up Teams that will automa cally enroll a pa ent to a TEAM when the pa ent is enrolled in a clinic that is associated with that team. A user can also discharge from a TEAM (if not assigned to a team role in a team) when the pa ent is discharged from a clinic associated with that team.

B

Bu on Bar: A Bu on Bar is also referred to as a Tool Bar - small boxes that contain graphic figures that represent various func ons.

C

Calendar Display: Within PCMM, when there is a date field, the user can "double click" the field and a miniature calendar will 'pop up' for selec on of a date and year. This is used for Ac va on and Deac va on dates as well as Discharge dates.

Care Type: A required field that describes the type of service being delivered by the teamlet. The user must select an item from the list displayed.

Clerk: This person is a clerk who performs data entry.

Context Bar: The dark blue banner at the bo om of the Banner that shows the user's duty sta on, user name, and log out link. There are also bu ons of the applica ons that the user has permissions to use. If the user is an administrator, they can sign on with no duty sta on specified (as in the example above) un l they begin to perform the func ons they have authoriza on to do.

Clinical Pharmacist: Performs pa ent care du es related to pa ent medica ons as assigned or granted by the appropriate governing commi ee at the facility. These privileges may include and may or may not be limited to:

- (1) Ini a on of renewal orders for chronic maintenance medica ons
- (2) Ini a on of orders for laboratory tests necessary to monitor exis ng drug therapy.

Clinical Service: A Service defined at the medical center, e.g. Medicine, Surgery, Intermediate Medicine, etc.

Closing: Another term for 'inac va ng' a team role or team.

Consults: When a pa ent is referred to a clinic on a one- me basis, he/she is not normally enrolled in that clinic.

Control Key: A Control Key is the key on the lower le and right hand side of the keyboard that is en tled 'CTRL'. When a user presses this key along with another character (e.g. CTRL + O), the user can select and OPTION, etc.

D

Database: This refers to the informa on that is stored in your medical center's computer program, e.g., pa ent informa on, service informa on, clinic informa on, etc.

Dialogue Box: A dialogue box is a box or window that is placed within a screen that allows the user to enter a 'free text' message or descrip on of the object being created (in some cases, the descrip on of what a team is supposed to represent).

Die an: Performs pa ent care du es related to nutri on and weight management.

Display Box: This is a window that displays informa on or lists available clinics, team roles, or teams to choose from. The user may select an item from the list displayed.

Double Arrow: Double arrows are two arrows next to each other indica ng that more than one pa ent name may be moved over from an inac ve status to an ac ve status and back to an inac ve status. (>>)

Drop-Down List: When a user selects an item from the menu bar, a list is displayed in a ver cal format. For example, if a user selects **File**, a list drops down showing all op ons that are available under the main heading **File**: **File, Edit, Print, Save.**

Duty Sta on: A duty sta on is a loca on where a person is based (typically, it is where a person receives a paycheck). It may be a place where health care is not provided, such as a na onal cemetery or an office building.

E

E-Mail Messages: These are the messages that are generated by a so ware event that delivers informa on to designated users via MailMan. E-mail messages in the PCMM module would include informa on about death no fica ons, inpa ent movements, consult no fica ons, and team no fica ons or changes.

F

Footer: The Footer is displayed at the bo om of every window. It displays the version of the applica on, the copyright date, and a link to contact the applica on owners.

Func onal Sta on: A loca on where health care is provided (a trea ng facility), such as a VA Hospital/Medical Center or clinic.

Focus: The focus further iden fies the type of service being delivered by the teamlet. Focus 1 is required for the Care Type of Primary Care and should reflect the principal service delivered. Focus 2 is op onal and may serve to further define addi onal services delivered by the teamlet. The selec on of a Focus under the Care Type of Primary Care will auto populate teamlet posi ons.

H

Highlight: To 'Highlight' a name, team, team role, or date, one would place the cursor (or arrow) on the name, team, or team role they wish to choose and 'click' the mouse bu on to select it or highlight it.

History File: Although not specific to any one document, a history file is a compila on of various pieces of informa on pertaining to individual teams, team roles, etc. for future reference and clarifica on.

I

Icon: An Icon is an image or snapshot of something that is visually understood and is represented in a 'box'. For instance, an ICON that stands for 'cu ng' a piece of text out of a document would be a box with a picture of a pair of scissors in it. They are also known as 'bu ons'.

Intern (Physician): Performs pa ent care du es in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Prac oner. Du es include, but may not be limited to, (1) comple ng history & physical examina ons, (2) obtaining blood and other specimens, and (3) provision of pa ent medical care as permi ed. The person cannot act as Primary Care Provider. The Intern is an Associate Provider within a Primary Care Team (see Associate Provider Term).

IRM: Informa on Resource Management

M

MAS ADPAC: Medical Administra on Service Automated Data Processing Applica ons Coordinator

Medical Student: Performs pa ent care du es in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Prac oner.

Menu: The list of items on the le side of the window. The Menu displays the ac ons that are available to a user, based on the role.

N

NPCD: Na onal Pa ent Care Database - is maintained in Aus n and receives selected demographic and encounter-based clinical, diagnos c data form VA medical centers. This data enables a detailed analysis of VHA inpa ent and outpa ent health care ac vity.

Nurse (LPN): Provides a variety of nursing services that do not require full professional nurse educa on, but are represented by the licensing of prac cal and voca onal nurses by a State, Territory or the District of Columbia. Persons in these team roles may also provide administra ve assistance, such as making appointments, etc.

Nurse (RN): Provides care to pa ents in clinics and other se ngs, administers anesthe c agents and suppor ve treatments to pa ents undergoing outpa ent surgery and other medical treatments, promotes be er health prac ces, and consults or advises nurses providing direct care to pa ents. Persons in this team role require a professional knowledge and educa on in the field of nursing.

Nurse Prac oner: Performs pa ent care du es in accordance with Scope of Prac ce under the supervision of a designated physician or physicians and Medical Center Policy. Du es include, but are not limited to, appropriate assessments, orders diagnos c tests and consulta ons as necessary, prescribes treatment interven ons in accordance with established protocols, provides or arranges follow-up care, and provides health teaching and suppor ve counseling. Is authorized to act as a Primary Care Provider or Associate Provider. The ability to act as a Primary Care Provider is decided by individual facili es.

O

OIF/OEF: Opera on Iraqi Freedom/Opera on Enduring Freedom.

Other: A general classifica on for those team members who do not belong in any of the listed Standard Posi on entries.

P

Panel: A panel is a group of individual pa ents for which the Primary Care Provider has accepted primary care responsibility.

Patient Panel: Group of individual patients assigned to a Team/Position.

Prac oner: Can be either Primary Care or Non Primary Care pa ents; e.g., the Prac oner's Pa ents Report includes both Primary Care and Non Primary Care pa ents assigned to the prac oner in the Pa ent Panel Count.

Pa ent Services Assistant: Provides clerical and pa ent processing support to outpa ent clinics, or other unit of a medical facility, in support of the care and treatment given to pa ents. This includes du es as recep onist, record-keeping du es, clerical du es related to pa ent care, and miscellaneous support to the medical staff of the unit.

PC Coordinator: Primary Care Coordinator

PCMM: Pa ent-Centered Management Module

Person Class File: Consists of provider taxonomy developed by Health Care Finance Administra on (HCFA). The taxonomy codifies provider type and provider area of specializa on for all medical related providers.

Physician Assistant: Performs pa ent care du es in accordance with Scope of Prac ce under the supervision of a designated physician or physicians and Medical Center Policy. Du es include, but are not limited to, diagnos c and therapeu c medical care and services, taking case histories, conduc ng physical examina ons, and ordering lab and other studies. Physician Assistants also may carry out special procedures, such as giving injec ons or other medica on, apply or change dressings, or suturing minor lacera ons. The ability to act as a Primary Care Prac oner is decided by individual facili es.

Physician-Primary Care: As a physician, incumbent's du es are to advise on, administer, supervise or perform professional and scien fic work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to prac ce medicine and surgery in a US State, territory or the District of Columbia. As a Primary Care prac oner, the incumbent provides the first point of assistance for a pa ent seeking care. Primary Care du es include: (1) Intake and ini al needs assessment, (2) Health promo on and disease preven on, (3) Management of acute and chronic biopsychosocial condi ons, (4) Access to other components of health care, (5) Con nuity, and

(6) Pa ent and non-professional care giver educa on & training. (from IL 10-93-031, Under Secretary for Health's Le er) Can act as Primary Care Prac oner.

Physician-Psychiatrist: As a physician, incumbent's du es are to advise on, administer, supervise or perform professional and scien fic work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to prac ce medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Creden als commi ee) in regard to the prac ce of Psychiatry.

Physician-Subspecialty: As a physician, incumbent's du es are to advise on, administer, supervise or perform professional and scien fic work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to prac ce medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Creden als commi ee) concerning the prac ce of Specialty or Subspecialty care in the areas of Medicine or Surgery.

Posi on: Or referenced as Team Roles. Teams are comprised of one or more staff posi ons (or team roles). Individual prac oners are assigned to a team posi on (or role). A posi on (or role) is designated to serve certain roles in the overall primary care se ng.

Preceptor: Responsible for providing the overall care for pa ents assigned to an Associate Provider or Medical Student. On Primary Care Teams, the Preceptor must be able to provide Primary Care.

Primary Care: Primary care is the provision of integrated, accessible health care services by clinicians that are accountable for addressing a large majority of personal health care needs.

Pa ent-Centered Management Module (PCMM): Pa ent-Centered Management Module is the applica on for VA facili es to use for implemen ng primary care teams. Teams are created, team roles associated with the teams are created, staff members are assigned to team roles, and pa ents are assigned to the teams and team roles.

Primary Care Provider: In PCMM, the Primary Care Provider is the team role determined to be responsible for the coordina on of the pa ent's primary care.

Psychologist: Performs pa ent care du es in accordance with Clinical Privileges as assigned or granted by the appropriate governing commi ee in the area of Psychology and Mental Health. This may include individual, family and group counseling and psychotherapy, asser veness and other behavior training, etc.

R

Rehab/Psych Technician: Provides pa ent care in accordance with Clinical Privileges as assigned or granted by the appropriate governing commi ee in the area of Psychology and

Mental Health. This may include individual, family or group counseling. A degreed Psychologist or Mental health prac oner typically supervises the incumbent.

Remedy Ticket: A support request that is sent to the VA Service Desk.

Resident (Physician): Performs pa ent care du es in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Prac oner. Du es include, but may not be limited to, comple ng history and physical examina ons, obtaining blood and other specimens, and provision of pa ent medical care as permi ed. The resident is an Associate Provider within a Primary Care Team. As a Resident, the incumbent is responsible for providing pa ent care as directed by the Preceptor. Cannot act as Primary Care Provider.

Role: A func on or task of a staff member involved with the implementa on, maintenance and con nued success of primary care.

S

Sec on 508 Compliance: Applica ons that are Sec on 508 compliant can be used with assis ve technology so ware.

Social Worker: Performs pa ent care du es in accordance with Clinical Privileges as assigned or granted by the appropriate governing commi ee in the area of Social Work. Provides direct services to individuals, groups and families with counseling, discharge planning, crisis interven on, etc.

Specialty Clinics: A set of clinics that are defined as SUBSETS of generalized Service clinics such as Cardiology (specialty of Medicine); Orthopedics (specialty of Surgery), etc.

T

Team: Teams are groups of staff members organized for a certain purpose (e.g., Primary Care).

Team Capacity Override: This op on is available when the user selects to override the capacity and represents the adjusted number of pa ents that should be assigned to this team. This func onality is only used with Primary Care types that have a Focus of Primary Care Only or Women's Health. This field. This adjusted value must be > 0 and can be < or > the Team Modeled Capacity.

Team Modeled Capacity: The total number of patients that should be assigned to this team (e.g. the Panel Size for the team). This value is take from the Aggregated Modeled Team Capacity for station and adjusted according to the team's Primary Care Direct Care, Support Staff FTE, and Room Utilization.

Team Pharmacist: A pharmacist who: (1) Is authorized to Fill/Dispense medica ons (2) Enter/Verify medica on orders (3) Provide pa ent educa on rela ng to medica ons (4) Renew established medica ons under the protocols defined by the medical center.

Team Profile: This is a screen within PCMM that shows the various characteris cs of a par cular team, e.g., number of pa ents allowed for enrollment, name, team roles assigned, etc.

Text Box: The text box is also known as the DIALOGUE box as described above. It provides the user with an area in which to iden fy certain characteris cs of a par cular component of PCMM. For example, the descrip on of what a team is for (provides primary care to pa ents that have been discharged from the hospital within the last 6 months).

Title Bar: Title bar is the bar that shows the TITLE of the screen that the user is presently accessing. For instance, the TITLE BAR on the Team Set-Up screen could be 'Team Profile.'

Tool Bar: The Tool Bar is what is displayed either at the top of the screen or at the bu on, and contains a picture of all of the available ICONS that may be chose to perform certain tasks. Unlike the MENU BAR, the menu bar contains the 'words' for func ons, whereas the TOOL BAR contains the 'pictures' that represent func ons.

Tool Bu ons: A tool bu on is ONE of the icons that is shown across the top (or bo om) of a screen on the TOOL BAR.

TPA: Transi on Pa ent Advocates assist in tracking the treatment of seriously ill veterans of Opera on Iraqi Freedom (OIF) and Opera on Enduring Freedom (OEF).

U

Uniques: Uniques for the purpose of PCMM Primary Care are defined as the individual veteran (pa ent) enrolled in VA health care that makes up the primary care provider's panel.

User Class: User Class is a file that will be transported with the Primary Care Management Module that stores the users (physicians, social workers, staff clerks, etc.) actual posi on tles as defined by the site.

User Profile: A user profile is called My Profile and is accessed from the le menu bar. It contains user informa on such as the user's role.

V

VistA: Veterans Health Informa on Systems and Technology Architecture, formerly known as Decentralized Hospital Computer Program, encompasses the complete informa on environment at VA medical facili es.

VHA: Veteran's Health Administra on

VISN: Veterans Integrated Service Network