

**Department of Veterans Affairs**  
**Patient Centered Management Module (PCMM) –**  
**PCMM Web**

**WEBP\*1\*1 and SD\*5.3\*603**  
**Release Notes**



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**Department of Veterans Affairs**  
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**Product Development**

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# **1. Introduction**

## **1.1. Purpose**

The purpose of these Release Notes is to identify enhancements to the Patient Centered Management Module (PCMM) Web application which replaces Legacy PCMM. Three patches are included with this release: PCMM WEBP\*1\*1, SD\*5.3\*603, and OR\*3\*387.

## **1.2. Background**

The mission of the Department of Veterans Affairs (VA), the Office of Information and Technology (OIT), and the Veteran Health Administration (VHA) is to provide benefits and services to Veterans of the United States. In meeting these goals, OIT strives to provide high-quality, effective, and efficient Information Technology (IT) services to those responsible for providing care to the Veterans at the point-of-care as well as throughout all the points of the Veterans' health care in an effective, timely, and compassionate manner.

VHA has developed a Primary Care (PC) system that balances productivity with quality, access, and patient service. Management of patient panels in PC through mandatory and consistent use of the Patient-Centered Management Module (PCMM) has supported this system redesign. In a PC setting and in the Patient-Aligned Care Team (PACT) model, patients are assigned a Primary Care Provider (PCP) who is responsible for delivering essential health care, coordinating all health care services, and serving as the point of access for VA care. The PCP works together with a team of professionals which includes nurses, pharmacists, social workers, health care professions, trainees, clerks, and more.

The PCMM Web software is considered to be an important component in measuring patient demand and PCP capacity to meet that demand, as well as reduce wait times. It allows users to set up and define treatment teams, assign positions to the team, assign staff to positions, assign patients to the team, and assign patients to a PCP. PCMM Web was developed to assist VA facilities in implementing PC. PCMM Web supports both PC and non-PC teams. Teams are groups of staff members organized for a certain purpose.

The PCMM software will be referred to as PCMM Web. It is a National website and contains data for all sites. It will replace the current PCMM software accessible on the user's desktop. An integral part of PCMM Web is the Data Migration that migrates the data from Legacy PCMM to PCMM Web. It is accessed via the VA intranet by users who have been trained and granted access. The main users of PCMM Web are PCMM Coordinators, Mental Health Treatment Coordinators, Transition and Care Management Coordinators, and Travelling Veteran Coordinators. PCMM Web retrieves provider and patient data from VistA via VistALink and interfaces with the Master Veteran Index via HL7 and Java to validate each patient's national identity. PCMM Web synchronizes data back to the VistA PCMM files so it can continue to be accessed by existing software that currently utilizes it.

## 2. Associated Patches

The following patches are available with this release:

PCMM Web Informational Patch:

- WEBP\*1\*1 - PATIENT-CENTERED MANAGEMENT MODULE (PCMM) WEB

VistA Patches:

- SD\*5.3\*603 – PCMM WEB LEGACY CHANGES
  - This VistA patch is required for PCMM Web and VistA systems such as CPRS. It must be installed in close coordination with PCMM Web.
- OR\*3.0\*387 – PCMM WEB TEAM DISPLAY ENHANCEMENTS TO CPRS
  - This VistA patch is required to support changes to PCMM team and provider information displayed in CPRS.

## 3. New PCMM Web Application

The Patient Centered Management Module (PCMM) Web application continues to assist VA facilities in implementing and monitoring patient and staff assignments in both primary care and non-primary care teams. PCMM Web is a web browser, user interface integrated through the Clinical Information Support System (CISS) portal. Once users have been trained and granted access, they can access PCMM Web using the following link:

**REDACTED**

- A VA Network ID and Password are required for log-in and a link is displayed to the PCMM web application after VA credentials are entered. For PCMM Web access, please contact your VISN or Facility PCMM Coordinator.
- Once a user logs in, the user name and station number displays in the application header, and a user can navigate throughout the web application using the menu or breadcrumb links.

### 3.1. PCMM Web Functionality

The following is new functionality in PCMM Web:

- Enables a team to be formed based on specific Care Type (i.e., Primary Care, Mental Health) and aligned around a patient, including providers across multiple VA sites and in non-VA settings for efficient care coordination and communication. Team and Patient management is possible through interactive screens with navigation links, expandable sections, and actions icons, providing an overall view of care coverage and maintenance capabilities.
- Identifies team members and specialists (VA and non-VA) involved in the care of the patient, as well as their contact information and provide modalities to facilitate provider-to-provider communication.
- Enables users to set up and define a healthcare team, assign staff and health professionals to positions within the team, assign patients to the team, and assign patients to practitioners, including trainees. Teams can be grouped together for a larger collaborative team.
- Quickly generates a team based on a modeled configuration for a specific team care type with team positions included, eliminating the need to manually create each team and position.

- Supports automated data collection for management metrics and analysis related to access, workload, and panel management for Multiple PACT functionality at the team level.
- Patients assigned to Primary Care teams are assigned as “Pending” until a Primary Care encounter is verified by a Primary or Secondary Provider, who is also a teamlet of the assigned team. The assignment then changes to “Active”. If there is an Active assignment and a Pending assignment for a patient at the same site and when a qualifying PC encounter is detected for the Pending assignment, an intra-facility transfer will be executed by the System. The Active assignment will be inactivated and the Pending assignment will be Activated. The patient can be assigned to the “Team” (i.e., the Primary Care Provider and the teamlet inherits the assignment) or to the “Associate Provider” that has a valid preceptor relationship established.
- Patient assignments to Primary Care teams are interrogated nightly to verify for Automatic Inactivation. An established assignment without activity for 24 months is automatically inactivated due to inactivity. A new assignment without activity for 12 months is automatically inactivated due to inactivity. The PCMM user is notified of the pending inactivation three months prior to the automatic inactivation. Reports are also available.
- Identifies and tracks patient assignments across stations. A Multiple PACT request enables a patient to be assigned to multiple PACT teams as required for care coverage across VA systems. This request requires an approval or a denial from all involved stations. Multiple assignment requests for the same patient for different stations are allowed, but there can only be one active assignment per patient, per station at a time.
- Patients assigned to non-primary care teams (i.e., Mental Health or specialty) must be assigned to specific providers within the team.
- Search capabilities enable a user to quickly search for a patient, team, room, group, or staff member for assignment/unassignment management through interactive screens and menu options. To expand a search outside of PCMM Web, a user can search for a patient through VistA.
- Quickly assign or reassign one or more patient to and from a team or a position using a batch process, instead of manually performing the tasks one-by-one.
- Enables clinical reviews and approvals to reinforce status activity and assignment management.
- One or more users at each physical site (i.e., hospital, clinic) in the VA hold roles within the PCMM Web application (such as PCMM Coordinator, Traveling Veteran Coordinator, VISN Coordinator, and National Administrator). Each role has associated access privileges which enables the user to perform functions within PCMM Web.
- Eligible preceptor relationships are managed through team position profiles.
- Manage how reference data displays in PCMM Web by enabling the definition of your own reference values.
- Summarizes alert notifications per station for a user to quickly identify alert types and act accordingly.
- Defines the appropriate team members to receive notifications (i.e., MailMan messages) concerning patient assignments. Notifications are sent to all team patients, positions, or preceptors or set as “Do Not Send”, indicating no notifications are sent.
- PCMM Web utilizes Microsoft SQL Report Server for its reporting capabilities. Canned and AdHoc reports are available.

## 4. New Positions

With this release, several position names were changed and new positions were added. The changes are included with the Patch SD\*5.3\*603.

### Name change

TEAM PHARMACIST to PACT CLINICAL PHARMACIST

DIETITIAN to REGISTERED DIETITIAN

OIF OEF CLINICAL CASE MANAGER to TCM CLINICAL CASE MANAGER

OIF OEF PROGRAM MANAGER to TCM PROGRAM MANAGER

OIF OEF TRANSITION PATIENT ADVOCATE to TCM TRANSITION PATIENT ADVOCATE

### New positions

ADMINISTRATIVE ASSOCIATE

ANTICOAG CLINICAL PHARMACIST

ADVANCE PRACTICE ASSOCIATE PROVIDER

ASSOCIATE PROVIDER

CLINICAL ASSOCIATE

FELLOW

NURSE (LVN)

NURSE PRACTITIONER ASSOCIATE PROVIDER

PEER SUPPORT APPRENTICE

PEER SUPPORT SPECIALIST

PHYSICIAN ASSISTANT ASSOCIATE PROVIDER

PRIMARY CARE PROVIDER

SURROGATE CARE MANAGER

SURROGATE PRIMARY CARE PROVIDER

SURROGATE CLINICAL ASSOCIATE

ADVANCE PRACTICE NURSE

ADVANCE PRACTICE NURSE (MHTC)

LEAD COORDINATOR

PEER SUPPORT SPECIALIST (MHTC)

## 5. Fields, File, and Values Updates

The following are new or modified fields, file, and values with the Patch SD\*5.3\*603.

Field Name	Function
TEAMLET POSITION (#.12)	Indicates whether a position is a teamlet member. New field is available in the POSITION ASSIGNMENT HISTORY (#404.52) File.
FTEE HISTORY (#1) FTEE HISTORY (#.01) VALUE (#.02) USER (#.03)	Field descriptions in the POSITION ASSIGNMENT HISTORY (#404.52) File were modified to reflect that PCMM Web will maintain FTEE history data. The trigger (FTEXR) on the FTEE EQUIVALENT (#.09) field previously performed updates to FTEE HISTORY and will be deleted by the post-install routine.

File	Code Values Changed
PATIENT TEAM ASSIGNMENT (#404.42) File	<p>New code values were added to two fields:</p> <p>ASSIGNMENT TYPE (#.08)</p> <p>'98' for PENDING PRIMARY CARE STATUS (#.15)</p> <p>'DU' for DOD UNASSIGN</p> <p>'IU' for INACTIVE UNASSIGN</p> <p>'DD' for REASSIGN-DOD REMOVED</p> <p>'PR' for PAT RELOCATION</p> <p>'RP' for REQ BY PAT</p> <p>'NN' for NOT NEEDED</p> <p>'PC' for PROV CHANGE</p> <p>'PI' for MVI MOVE/MERGE</p> <p>'FT' for INTRA FAC TRANS</p> <p>'MU' for MISSING/UNK</p> <p>'MD' for M-PACT DENIAL/WDRAW</p> <p>'DC' for DISCHARGE FROM CARE</p> <p>'ER' for ERROR</p>
PATIENT TEAM POSITION ASSIGNMENT (#404.43) File	<p>New code values were added to one field:</p> <p>STATUS (#.12)</p> <p>'DU' for DOD UNASSIGN</p> <p>'IU' for INACTIVE UNASSIGN</p> <p>'DD' for REASSIGN-DOD REMOVED</p> <p>'PR' for PAT RELOCATION</p> <p>'RP' for REQ BY PAT</p> <p>'NN' for NOT NEEDED</p> <p>'PC' for PROV CHANGE</p> <p>'PI' for MVI MOVE/MERGE</p> <p>'FT' for INTRA FAC TRANS</p> <p>'MU' for MISSING/UNK</p> <p>'MD' for M-PACT DENIAL/WDRAW</p> <p>'DC' for DISCHARGE FROM CARE</p> <p>'ER' for ERROR</p> <p>A new cross reference ("C") was added to TEAM POSITION (#.02)</p>
OUTPATIENT PROFILE (#404.41) File	<p>Two new fields were added:</p> <p>CPRS HEADER TEXT (#.06) - This field is populated by PCMM Web with primary care information to be displayed in the CPRS PCMM Header.</p> <p>CPRS PC WINDOW CACHE (#.07) - This field stores the last data set displayed in the CPRS Primary Care Details Window. This cached data will be displayed if there is no connection to PCMM Web.</p>
OUTPATIENT ENCOUNTER (#409.68) File	<p>A new Index, ACOD, was created to sort records by PATIENT (#.02) and CHECK OUT</p>



File	Code Values Changed
	PROCESS COMPLETION (#.07)
PCMM PATIENT EVENTS (#404.54) File	This is a new file used to track patient events of interest to PCMM Web. PATIENT (#.01) EVENT DATE/TIME (#.02) EVENT CODE (#.03) EVENT DATA (#.04)
TEAM PURPOSE (#403.47) File	Two new records were added: PRIMARY CARE - NVCC PRIMARY CARE - HBPC

## 6. Routines

The following are new or modified routines included with the Patch SD\*5.3\*603.

Routine Name	Function
SCMCTSK	Modified to update several files when a patient date of death is entered or removed in the Patient (#2) File.
SCMCTSK2	Modified to ensure the PCMM NIGHTLY TASK [SCMC PCMM NIGHTLY TASK] menu option job never runs on VistA. (A QUIT statement was added immediately after the entry point - NIGHT.)
SCMCMHTC	Modified to fix a date comparison issue.
SCAPMC23	Modified to correct an endless loop when reading unexpected data.
SCMCDD1	Modified to create or update OUTPATIENT PROFILE (#404.41) records for all assignment types. The routine was also modified to add "fail-safes" to quit processing if PATIENT TEAM ASSIGNMENT (#404.42) or PATIENT TEAM POSITION ASSIGNMENT (#404.43) records are not found when sending mail messages.
SCMCTSK5, SCMCTSK6	The routines were modified to change auto-inactivation related time periods and other text in report and mail boiler plate text. All auto-inactivation processing will be performed by PCMM Web.
SDCOU	Modified to create ACOD index records for Credit Stop Code OUTPATIENT ENCOUNTER (#409.68) records.
SD53P603	Developed to perform the following actions: <ul style="list-style-type: none"> <li>Add or update HWSC server and web service file entries</li> <li>Add the application proxy user</li> </ul>

Routine Name	Function
	<ul style="list-style-type: none"> <li>• Convert STATUS (#.12) in or PATIENT TEAM POSITION ASSIGNMENT (#404.43) from NA to IU</li> <li>• Build the new ACOD index for the OUTPATIENT ENCOUNTERS file</li> <li>• Build the new C cross reference for PATIENT TEAM POSITION ASSIGNMENT (#404.43) TEAM POSITION (#.02)</li> <li>• Un-schedule the legacy PCMM Nightly Task from TaskMan</li> <li>• Place PCMM legacy menu options out-of-order</li> <li>• Change users' secondary menu option from SCMC PCMM GUI WORKSTATION to SCMC PCMMR WEB USER MENU</li> <li>• Create missing ACOD index records in OUTPATIENT ENCOUNTER (#409.68) file</li> <li>• Delete the trigger cross reference (FTEXR) on POSITION ASSIGNMENT HISTORY File (#404.52): FTEE EQUIVALENT (#.09)</li> <li>• Create two records in the TEAM PURPOSE (#403.47) file <ul style="list-style-type: none"> <li>○ PRIMARY CARE – NVCC</li> <li>○ PRIMARY CARE - HBPC</li> </ul> </li> </ul>
SCMCOPT	Developed to place a number of PCMM legacy menu options and a protocol out-of-order. This routine also contains an entry point to change the value in the SECONDARY MENU OPTIONS (#.01) field in the SECONDARY MENU OPTIONS (#203) in the NEW PERSON (#200) file from SCMC PCMM GUI WORKSTATION to SCMC PCMMR WEB USER MENU. Both entry points are called by the post-installation routine, SD53P603.
SCMCFPOS	Developed to fix the TEAM POSITION (#404.57) file at sites that have deviated from the gold STANDARD POSITION (#403.46) file that is released with this patch.
SD53I603	Developed to delete the global for the STANDARD POSITION (#403.46) file and create the initial file header.
SCMCDDR	Developed to implement the RPC SCMC LISTER and returns VistA data to PCMM Web using the VA FileMan DBS API: Lister (LIST^DIC).

<b>Routine Name</b>	<b>Function</b>
SCMCDDR0	Developed to implement the RPC SCMC FINDER and returns VistA data to PCMM Web using the VA FileMan DBS API: Find (FIND^DIC).
SCMCDDR2	Developed to implement the RPC SCMC GETS ENTRY DATA and returns VistA data to PCMM Web using the VA FileMan DBS API: Data Retriever (GETS^DIQ).
SCMCDDR3	Developed to implement the RPC SCMC FILER and updates VistA data from PCMM Web using a VA FileMan DBS APIs: Filer (FILE^DIE) and Updater (UPDATE^DIE).
SCMCENCT	Developed to implement the RPC SCMC GET PATIENT ENCOUNTERS and returns patient encounter data to PCMM Web. The data is used to determine if and when a patient had a completed encounter with a teamlet member.
SCMCFTEE	Developed to implement the following five RPCs: SCMC FTEE CREATE SCMC FTEE READ SCMC FTEE READALL, SCMC FTEE UPDATE SCMC FTEE DELETE The RPCs allow PCMM Web to maintain FTEE HISTORY multiple (#1) in the POSITION ASSIGNMENT HISTORY (#404.52) file.
SCMCNPER	Developed to implement the RPC SCMC GET NEW PERSON and returns provider information to PCMM Web.
SCMCPAT	Developed to implement two RPCs: SCMC PATIENT DIEDON returns a patient's date of death to PCMM Web. SCMC PATIENT INFO returns patient demographic information to PCMM Web.
SCMCWS1, SCMCWS1A, SCMCWSUT	Developed to retrieve PACT and other team information that is displayed in the CPRS PC Details Window.

## 7. Remote Procedure Calls

The following new or modified Remote Procedure Calls with the Patch SD\*5.3\*603.

RPC	Function
SC DELETE ENTRY, SC PAT ASGN MAILMAN, SC PATIENT LOOKUP	Modified-set APP PROXY ALLOWED to Y.
SCMC FILER	Developed to update VistA data to PCMM Web using a VA FileMan DBS APIs: Filer (FILE^DIE) and Updater (UPDATE^DIE). Associated routine: SCMCDDR3.
SCMC FINDER	Developed to return VistA data to PCMM Web using the VA FileMan DBS API: Find (FIND^DIC). Associated routine: SCMCDDR0.
SCMC FTEE CREATE, SCMC FTEE READ, SCMC FTEE READALL, SCMC FTEE UPDATE, SCMC FTEE DELETE	The new RPCs were developed to allow PCMM Web to maintain the FTEE HISTORY (#1) multiple in the POSITION ASSIGNMENT HISTORY (#404.52) File. Associated routine: SCMCFTEE.
SCMC GET NEW PERSON	Developed to return provider information to PCMM Web. Associated routine: SCMCNPER.
SCMC GET PATIENT ENCOUNTERS	Developed to return patient encounter data to PCMM Web. The data is used to determine if and when a patient has a completed encounter with a teamlet member. Associated routine: SCMCENCT.
SCMC GETS ENTRY DATA	Developed to return VistA data to PCMM Web using the VA FileMan DBS API: Data Retriever (GETS^DIQ). Associated routine: SCMCDDR2.
SCMC LISTER	Developed to return VistA data to PCMM Web using the VA FileMan DBS API: Lister (LIST^DIC). Associated routine: SCMCDDR.
SCMC PATIENT DIEDON	Developed to return a patient's date of death to PCMM Web. Associated routine: SCMCPAT.
SCMC PATIENT INFO	Developed to return patient demographic information to PCMM Web. Associated routine: SCMCPAT.
SCMC PCDETAIL	Developed to return detailed PACT and other team assignment information for a patient. Used to batch load CPRS PC Window Cache during PCMMR deployment. Associated routines: SCMCWS1, SCMCWS1A, SCMCWSUT.

## 8. New VistA API

A VistA API – PCDEAIL^SCMCWS1 was developed to call the PCMM Web patient Summary web service to retrieve PACT and other team information that is displayed in the CPRS PC Details Window.

Supported Services:

- This API uses the HealtheVet Web Service Client (HWSC) to implement the web service. The default set up is performed by the post-install routine.
- This API is called by the CPRS Remote Procedure Call, ORWPT1 PCDETAIL.
- A new ICR, 6027 - SCMC PCMM/R GET PRIMARY CARE DETAILS, was created and activated to support new API functionality.
- This API is also used by the new RPC, SCMC PCDETAIL, to batch load the CPRS PC Window Cache during PCMMR deployment.
- Associated routines: SCMCWS1, SCMCWS1A, SCMCWSUT

**NOTE:** Sites will encounter an XINDEX Error after the installation of SD\*53\*603 patch. The routine, SCMCWS1 uses HWSC to call a Cache Class to parse the eXtensible Markup Language (XML) document returned by the web service call. A SAC Exemption (134) was approved on 02/04/2015.

## 9. Modified Template

The following template was modified with the Patch SD\*5.3\*603.

Template Name	Type	File Name (#)	New/Modified/Deleted
SCMC INACTIVATED	SORT	#404.43	Modified CAPMC23. Updated to account for new status codes.