



# AudioCARE Renewal

PSO\*7\*328 and OR\*3\*336

Release Notes and Installation Guide

January 2011



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# Introduction

This document provides set-up steps and installation instructions to re-activate the AudioRENEWAL™ Module within the AudioCARE® telephone refill system. The AudioRENEWAL Module was deactivated by all 43 locations using renewal functionality on January 16, 2009 to prevent a problem reported in PSPO #1218.

All sites are expected to install patch OR\*3\*336 to their production VistA system, even if they are not currently using the AudioCARE telephone refill system. For sites not using the AudioCARE telephone refill system the installation of patch OR\*3\*336 is all that needs to be done. For sites currently using the AudioCARE telephone refill system, everything in this Release Notes and Installation Guide is for you.

Note: Patch OR\*3\*336 is a replacement patch for OR\*3\*290, which has been entered in error. If you installed OR\*3\*290 successfully, do not uninstall it. Whether you have installed OR\*3\*290 successfully or not, you will need to install OR\*3\*336. There is no replacement patch for PSO\*7\*328 or the VEXRX routines.

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## Release Notes

The AudioRENEWAL module will now use a standard CPRS Application Programming Interface (API) to perform the renewal. This new Class I interface has been written in such a way that other renewal systems will be able to utilize the same API in order to renew Outpatient prescriptions. Note, however, that other renewal systems have not been tested using this API.

In order to implement the Class I interface for the renewal process, modifications to the renewal code in the Class III AudioCARE routine VEXRX were necessary. The refill code of the VEXRX routine was not affected. Patch PSO\*7\*328 is an “information only” patch that provides instructions for obtaining the updated version of routine VEXRX.

The instructions in patch PSO\*7\*328 should be followed at sites using AudioCARE applications, even if they are not using the renewal functionality. The associated patch, OR\*3\*336, performs an environment check to confirm that the updated 'renewal' version of VEXRX has been retrieved and installed as instructed. If the previous 'renewal' version is detected the patch installation will abort.

Patch OR\*3\*336 installs the new API (RENEW), a new notification (OP RX RENEWAL REQUEST), a new mail group (AUTORENEWAL), and a new General Parameter (OR AUTORENEWAL USER). The refill portion of AudioCARE will not be affected. Complete the set-up for these new components after installing patch OR\*3\*336.

It is recommended that sites should install patch OR\*3\*336 in test accounts prior to installing the patch in a production account. It is not possible to test AudioRENEWAL in test accounts because the AudioCARE server is only available to production.

Do not install the routine VEXRX when the option Process Telephone Refills [A3A PHONE REFILLS] is in use. This option name may vary slightly between sites. Patch OR\*3\*336 may be installed with users on the system.

Each of the two patch installations take less than five minutes.

These installations do not change the functionality of CPRS or Outpatient Pharmacy applications.

An updated CPRS Technical Manual and CPRS GUI Technical Manual will be distributed with the release of these patches.

## New Notification OP RX RENEWAL REQUEST

The OR RX RENEWAL REQUEST notification, when enabled, triggers an information alert to defined recipients when the renewal request is for a non-renewable drug. Sites using the AudioRENEWAL Module have several aspects to consider when determining how to use this notification in conjunction with the AudioRENEWAL user parameters. AudioRENEWAL user parameters reside on the AudioCARE server.

If the AudioRENEWAL parameter **Process Non-renewable** is set to 'Y' the patient receives the recorded message that the renewal request has been submitted. The request will list in the MailMan message with the subject line 'Renewal Requests not sent to Providers' with the detail of the message listing the patient's name, prescription number and the problem detail 'Drug not Renewable'. If the OP RX RENEWAL REQUEST Notification is enabled the site can use the 'Set Provider Recipients' values and designate who receives the notification. In this situation no renewal order is automatically created. Actually, the renewal processing is never allowed to automatically create a renewal order for a non-renewable drug.

If the AudioRENEWAL parameter **Process Non-renewable** is set to 'Y' the patient receives the recorded message that the renewal request has been submitted. The request will list in the MailMan message with the subject line 'Renewal Requests not sent to Providers' with the detail of the message listing the patient's name, prescription number and the problem detail 'Drug not Renewable'. If the OP RX RENEWAL REQUEST Notification is disabled the providers will not receive a notification. The idea would be to have a Pharmacy Technician monitoring the MailMan message for the non-renewable drug requests and make the determination to manually renew the prescription, which would send the 'Order requires electronic signature' notification to the appropriate provider. The Provider then determines if the renewed order should be signed or if other action is preferred (schedule/contact the patient).

If the AudioRENEWAL parameter **Process Non-renewable** is set to 'N' the patient receives the recorded message that the drug/prescription is not renewable and is instructed to contact the Provider or Pharmacy.

This notification is being released with the following default values:

- ORB ARCHIVE PERIOD - 30
- ORB DELETE MECHANISM - All Recipients
- ORB FORWARD BACKUP REVIEWER - No
- ORB FORWARD SUPERVISOR - No
- ORB FORWARD SURROGATES - No
- ORB PROCESSING FLAG - Disabled
- ORB PROVIDER RECIPIENTS - Ordering Provider, Attending, Primary and Teams
- ORB URGENCY – High

The three examples below demonstrate options when setting up the OP RX RENEWAL REQUEST notification. Each site needs to determine what settings are appropriate for their renewal notification. If your site elects to use this new notification, changes can be made for system, division, and other entities depending on how each parameter is defined. Notification parameter values for package entities (Order Entry/Results Reporting) should never be modified.

**1) Turn notification ON** (Exported (Default) Value: ORB PROCESSING FLAG – Disabled.) This example shows enabling at the SYSTEM level.

```
Select OPTION NAME: ORB NOT MGR MENU      Notification Mgmt Menu

Select Notification Mgmt Menu Option: 1  Enable/Disable Notifications

      Set PROCESSING FLAG Parameters for Notifications

Processing Flag may be set for the following:

   1  User          USR      [choose from NEW PERSON]
   2  Team (OE/RR)  OTL      [choose from OE/RR LIST]
   3  Service       SRV      [choose from SERVICE/SECTION]
   4  Location      LOC      [choose from HOSPITAL LOCATION]
   5  Division      DIV      [choose from INSTITUTION]
   6  System        SYS      [TEST.CHEYENNE.MED.VA.GOV]
   7  Package       PKG      [ORDER ENTRY/RESULTS REPORTING]

Enter selection: 6  System  TEST.CHEYENNE.MED.VA.GOV

---- Setting Processing Flag for System: TEST.CHEYENNE.MED.VA.GOV ----
Select Notification: OP RX RENEWAL REQUEST

Notification: OP RX RENEWAL REQUEST//  OP RX RENEWAL REQUEST  OP RX RENEWAL RE
QUEST
Value: Disabled// EN Enabled
Select Notification:
```

**2) Set Provider Recipients** (Exported (Default) Value: ORB PROVIDER RECIPIENTS - Ordering Provider, Attending, Primary and Teams.) This example shows setting at the SYSTEM level.

```
Select Notification Mgmt Menu Option: 7  Set Provider Recipients for
Notifications

      Set PROVIDER RECIPIENTS Parameters for Notifications

Provider Recipients may be set for the following:

   1  Division      DIV      [choose from INSTITUTION]
   2  System        SYS      [TEST.CHEYENNE.MED.VA.GOV]
   3  Package       PKG      [ORDER ENTRY/RESULTS REPORTING]

Enter selection: 2  System  TEST.CHEYENNE.MED.VA.GOV

---- Setting Provider Recipients for System: TEST.CHEYENNE.MED.VA.GOV ----
Select Notification: OP RX RENEWAL REQUEST

Notification: OP RX RENEWAL REQUEST//  OP RX RENEWAL REQUEST  OP RX RENEWAL RE
QUEST
Value: OAPT// ??  ← OAPT is default when patch is installed
```

Set of codes indicating default provider recipients of a notification by their title or relationship to the patient. Notifications can be set up with any or all of the following codes:

- P (Primary Provider): deliver notification to the patient's Primary Provider.
- A (Attending Physician): deliver notification to the patient's Attending Physician.
- T (Patient Care Team): deliver notification to the patient's primary care Team.
- O (Ordering Provider): deliver notification to the provider who placed the order which trigger the notification.
- M (PCMM Team): deliver notification to users/providers linked to the patient via PCMM Team Position assignments.
- E (Entering User): deliver notification to the user/provider who entered the order's most recent activity.
- R (PCMM Primary Care Practitioner): deliver notification to the patient's PCMM Primary Care Practitioner.
- S (PCMM Associate Provider): deliver notification to the patient's PCMM Associate Provider.

The providers, physicians and teams, must be set up properly and accurately for the correct individuals to receive the notification.

**3) Set Default Recipient(s).** This is an optional setting. A default user or team recipient will always receive OP RX RENEWAL REQUEST notifications for all patients, despite settings in the parameter ORB PROCESSING FLAG. This example shows enabling at the USER level.

```
Select Notification Mgmt Menu Option: 5  Set Default Recipient(s) for
Notifications

          Set REGULAR (DEFAULT) RECIPIENTS Parameters for Notifications

Notification Regular Recipients may be set for the following:

    1  User          USR      [choose from NEW PERSON]
    2  Team (OE/RR) OTL      [choose from OE/RR LIST]

Enter selection: 1  User  NEW PERSON
Select NEW PERSON NAME: CPRSPROVIDER,ONE          PT          192          OI&T STAFF

----- Setting Notification Regular Recipients  for User: CPRSPROVIDER,ONE -----
Select Notification: op rx RENEWAL REQUEST

Notification: OP RX RENEWAL REQUEST//    OP RX RENEWAL REQUEST    OP RX RENEWAL
REQUEST
Value: YES// ??

Default user or team recipients of a notification despite settings in the
parameter ORB PROCESSING FLAG.  These users/teams will always receive the
notification, regardless of patient.
```

Example Notifications:

Notifications					
Info	Patient	Location	Urgency	Alert Date/Time	Message
I	CPRSPATIE (C9867)		HIGH	06/15/2010@19:06	Rx Renewal Request for MEPERIDINE INJ.
I	CPRSPATIE (C9867)		HIGH	06/15/2010@19:06	Rx Renewal Request for DEXTROAMPHETAM
I	CPRSPATIE (C9867)		HIGH	06/15/2010@19:06	Rx Renewal Request for CODEINE SO4 60MG

The patient in this example, CPRSPATIENT,ONE had three non-renewable prescriptions requested. Note that each prescription triggers an individual Informational alert.

The corresponding MailMan Message:

```

Subj: RENEWAL REQUESTS NOT SENT TO PROVIDERS [#166046] 06/15/10@19:06 8 lines
From: AUTO,RENEWAL In 'IN' basket. Page 1 *New*
-----
Renewal Requests Not Sent to Provider

PATIENT                PRESCRIPTION  PROBLEM
=====
CPRSPATIENT,ONE       856909        Drug not renewable
CPRSPATIENT,ONE       856910        Drug not renewable
CPRSPATIENT,ONE       856911        Drug not renewable

Enter message action (in IN basket): Ignore//

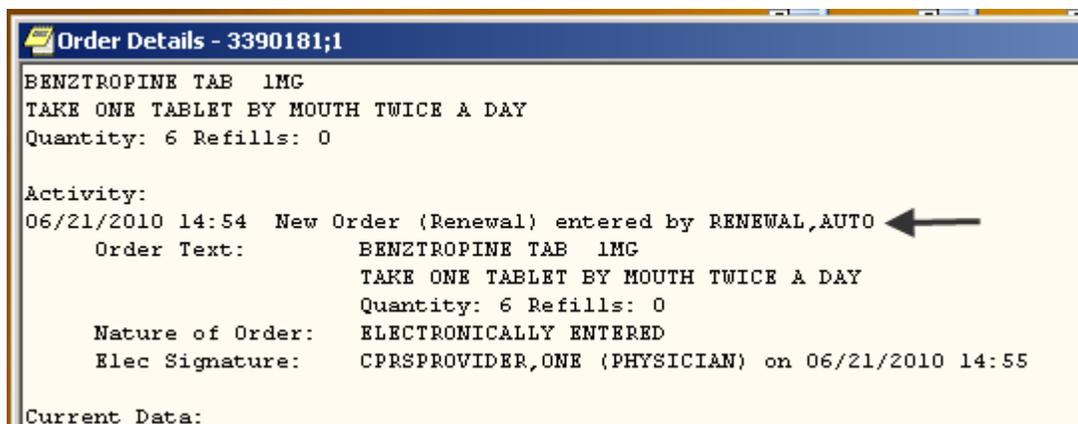
```

## New General Parameter OR AUTORENEWAL USER

This parameter will allow sites to enter a value needed by the auto renewal process to populate the 'entered by' value in the ORDERS (#100) file. This is a one-time set up. Sites will create a proxy user to place in the new parameter. The use of a proxy user will allow providers to easily identify a renewal processed from AudioCARE as each of these orders will contain the same 'entered by' value.

Set-up Example:

Sites may already have USER,AUDIOCARE PHONE set up for renewals. If not, set up the proxy user in the NEW PERSON (#200) file for filing renewal requests. For example: RENEWAL,AUTO. This is the user that will be the 'entered by' person in CPRS for the phone renewal orders. The screen displayed next shows where the proxy user's name is displayed in CPRS order detail.



```
Order Details - 3390181;1
BENZTROPINE TAB IMG
TAKE ONE TABLET BY MOUTH TWICE A DAY
Quantity: 6 Refills: 0

Activity:
06/21/2010 14:54 New Order (Renewal) entered by RENEWAL,AUTO
    Order Text:      BENZTROPINE TAB IMG
                    TAKE ONE TABLET BY MOUTH TWICE A DAY
                    Quantity: 6 Refills: 0

    Nature of Order: ELECTRONICALLY ENTERED
    Elec Signature:  CPRSPROVIDER,ONE (PHYSICIAN) on 06/21/2010 14:55

Current Data:
```

Example of entering the proxy user in the OR AUTORENEWAL USER parameter:

```
Select OPTION NAME: OR PARAM IRM MENU      CPRS Configuration (IRM)

<TEST ACCOUNT>      Order Check Expert System Main Menu ...
<TEST ACCOUNT>      ORMTIME Main Menu ...
<TEST ACCOUNT>      CPRS Clean-up Utilities ...
<TEST ACCOUNT>      General Parameter Tools ...
<TEST ACCOUNT>      HealtheVet Desktop Configuration ...
<TEST ACCOUNT>      Remote Data Order Checking Parameters

Select CPRS Configuration (IRM) <TEST ACCOUNT> Option: GENERAL Parameter Tools

<TEST ACCOUNT>      List Values for a Selected Parameter
<TEST ACCOUNT>      List Values for a Selected Entity
<TEST ACCOUNT>      List Values for a Selected Package
<TEST ACCOUNT>      List Values for a Selected Template
<TEST ACCOUNT>      Edit Parameter Values
<TEST ACCOUNT>      Edit Parameter Values with Template
<TEST ACCOUNT>      Edit Parameter Definition Keyword

Select General Parameter Tools <TEST ACCOUNT> Option: EP Edit Parameter Values
--- Edit Parameter Values ---

Select PARAMETER DEFINITION NAME: OR AUTORENEWAL USER CPRS AUTO-RENEWAL USER DUZ
--- Setting OR AUTORENEWAL USER for System: TEST.CENTRAL-TEXAS.MED.VA.GOV ---
CPRS AUTO-RENEWAL USER ID: // RENEWAL, AUTO      JW      119T      PHARMACY
SERVICE
-----
Select PARAMETER DEFINITION NAME:
```

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## New Mail Group AUTORENEWAL

Patch OR\*3\*336 installs the new mail group AUTORENEWAL that reports information about prescription refills/renewal processing. Before patch OR\*3\*336 is installed the Pharmacy staff needs to determine the appropriate person to coordinate the membership for the mail group. Communicate who the coordinator will be to the person that will be installing patch OR\*3\*336. The patch cannot be installed without this information. After the installation of the patch, assign at least one user to the AUTORENEWAL mail group using the option Mail Group Edit (XMEDITMG). Any User that executes the A3A PHONE REFILLS option will receive the MailMan messages for that session. Members of the mail group will receive the MailMan messages each time the option is executed. The mail group installs with 'self-enrollment' allowed.

The MailMan message reporting renewal requests that could not be processed as an unsigned Outpatient medication order includes specific details of the problem. More information on these detailed problems is included below. When multidivisional locations process refills/renewals by division and answer the prompt "Process telephone refills for all divisions?" with NO, only refills/renewal requests for that specified division are processed. The resulting MailMan message's subject line will contain the specified division number. The detail of messages will contain prescription information for that division only. When the prompt "Process telephone refills for all divisions?" is answered YES, all divisions refill/renewal requests are processed, and the resulting messages do not have a division number in the subject line.

Below is an example of the A3A PHONE REFILLS option being processed.

```
Select OPTION NAME: PROCESS TELEPHONE REFILLS  A3A PHONE REFILLS

Looking for refill requests for inactive Outpatient divisions....none found.

Outpatient Pharmacy software - Version 7.0

Division: EVANSTON CBOC      556GA

        You are logged on under the EVANSTON CBOC division.

Select LABEL PRINTER: OPLBL// HFS  IRM
HOST FILE NAME: NCH_HFS$: [TMP]TMP.DAT//  ADDRESS/PARAMETERS: "NWS"//

OK to assume label alignment is correct? YES//

Bingo Board Display: OUTPATIENT//

        Division: EVANSTON CBOC

Please answer the following for this session of prescriptions

        FILL DATE: (11/12/2009 - 12/31/2699): TODAY//  (MAY 11, 2010)
MAIL/WINDOW: MAIL// MAIL
Will these refills be Queued or Suspended ? S// USPENDED
Allow refills for inpatient ? N// O
Allow refills for CNH ? N// O

Process telephone refill requests at this time? YES//
Process telephone refills for all divisions? YES// NO
```

The resulting MailMan Messages contain the division number 556GA. Note that the first two Messages listed (#167 and #166) do not contain a division number. This is a result of answering the 'for all division' question YES.

```

IN Basket, 22 messages (4-47), 1 new
*=New/!=Priority.....Subject.....From.....
167. [165957] 05/13/10 RENEWAL REQUESTS NOT SENT TO 6 AUTO,RENEWAL
166. [165956] 05/13/10 REFILL TOTALS 5 AUTO,RENEWAL
165. [165955] 05/13/10 556 RENEWAL REQUESTS NOT SEN 7 AUTO,RENEWAL
164. [165954] 05/13/10 556 REFILL TOTALS 5 AUTO,RENEWAL
163. [165953] 05/13/10 556GD RENEWAL REQUESTS WITH 7 AUTO,RENEWAL
*162. [165952] 05/13/10 556GD REFILL TOTALS 5 AUTO,RENEWAL
161. [165951] 05/13/10 556 RENEWAL REQUESTS NOT SEN 7 AUTO,RENEWAL
160. [165950] 05/13/10 556 REFILL TOTALS 5 AUTO,RENEWAL

```

There are three distinct subject lines in the messages that will be sent to the AUTORENEWAL mail group. No more than one of each subject line will generate each time the PHONE REFILLS option is processed. The record count message will generate each time PHONE REFILLS option is processed.

**1) Subject: Renewal Requests Not Sent to Provider**

There are multiple situations when a renewal may not process. The message detail will contain the patient’s name, prescription number, and one of the following problem reasons:

- Failed DEA Check
- Chart Lock Failed
- Order lock Failed
- RX Status not Active or Expired
- Ordering Provider not Primary Care
- Provider NOT FOUND
- Provider flagged as TERMINATED
- Provider flagged as DISUSER
- Invalid Action – Details Below (i.e. This order may not be renewed.)
- No Auto-renewal User Defined
- No CPRS Order Number
- Order missing from ORDERS file
- Drug not renewable\*
- Clozapine Failed – details below
- Invalid Order number
- Problem with package in ORDERS file

```

Subj: RENEWAL REQUESTS NOT SENT TO PROVIDERS [#165957] 05/13/10@18:48 6 lines
From: AUTO,RENEWAL In 'IN' basket. Page 1
-----
Renewal Requests Not Sent to Provider

PATIENT                PRESCRIPTION  PROBLEM
=====
CPRSPATIENT,ONE       2054863      Drug not renewable
CPRSPATIENT,ONE       2054864      Rx Status not Active or Expired
CPRSPATIENT,TWO       2208571      Provider flagged as DISUSER
CPRSPATIENT,THREE     2143896      Invalid Action - Details Below
    This order may not be renewed!
CPRSPATIENT,FOUR      689524       Order Lock Failed
CPRSPATIENT,FIVE      6004465      Failed DEA Check
Enter message action (in IN basket): Ignore//

```

\* When the problem reason for a renewal not sent to providers is 'Drug not renewable' (first record in the example above) and the OP RX RENEWAL REQUEST notification is enabled, the providers defined in the notification settings will receive an information alert. The alert message text contains "Rx Renewal Request for <drug name>". Refer to the new notification section for additional information.

## 2) Subject: Renewal Requests with Order Checks

The message detail will contain the patient's name, CPRS order number, and the order check information. The orders checks that will be contained in the mail man message are limited to order checks triggered by the main ordering event 'Order dialog/display' by the special event 'Orders Renewed or Edited'.

- Estimated creatinine clearance if < 50
- Order checking not available/supported
- Renal functions for patients over 65
- Polypharmacy

```
Subj: RENEWAL REQUESTS WITH ORDER CHECKS [#3144716] 06/03/10@15:46:43 7 lines
From: AUTO,RENEWAL In 'IN' basket. Page 1 *New*
-----
Renewal Requests with Order Checks

PATIENT                PRESCRIPTION
=====
CPRSPATIENT,THREE      2208590
  Patient >65. Renal Results: <Results Not Found>

Enter message action (in IN basket): Ignore//
```

## 3) Subject: Refill Totals

This message is generated each time the phone refill process is executed. The message detail contains the total counts processed.

- Refills Processed
- Refills not Processed
- Renewals Processed
- Renewals not Processed

```
Subj: REFILL TOTALS [#165945] 05/12/10@15:13 5 lines
From: AUTO,RENEWAL In 'IN' basket. Page 1
-----
Refills Processed: 248
Refills 'Not Processed': 3

Renewals sent to provider: 59
Renewals not sent to provider: 10

Enter message action (in IN basket): Ignore//
```

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# AudioRENEWAL Reactivation and Clinic Review

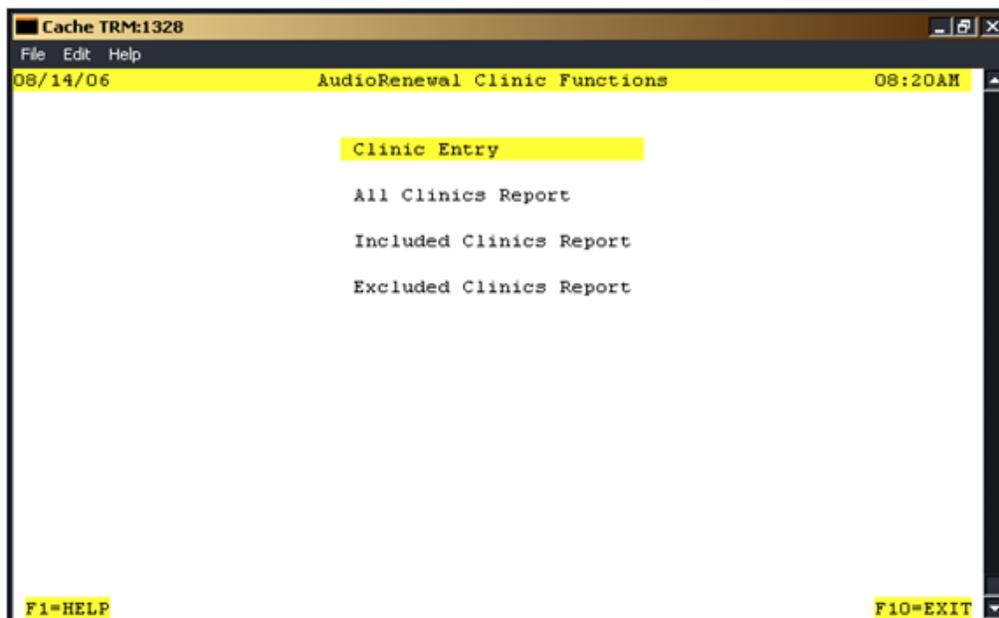
## Clinic Options

The RENEWAL function was deactivated in January, 2009. Sites reactivating RENEWAL should consider what clinic updates may be needed as they prepare to re-activate RENEWAL (i.e. new clinics, inactivated clinics) after installing patch OR\*3\*336. This section explains how AudioRENEWAL clinic options function and how to make clinic updates on your AudioCARE server...

The Clinic Options Menu enables you to define the clinics that have approved the automation of renewal requests and reports. When RENEWAL was initially set up at your site the clinics were defined. By reviewing the clinic information currently residing in your AudioCARE server you will be able to determine what updates are needed to ensure the proper clinics process renewals. Follow the steps below to review your current clinic information.

Actual screen displays, step order, and verbiage may vary depending on which version of AudioRENEWAL your site is using.

Access the Clinic Options Menu from the AudioRENEWAL Menu by selecting Clinic Options. The following screen will display:



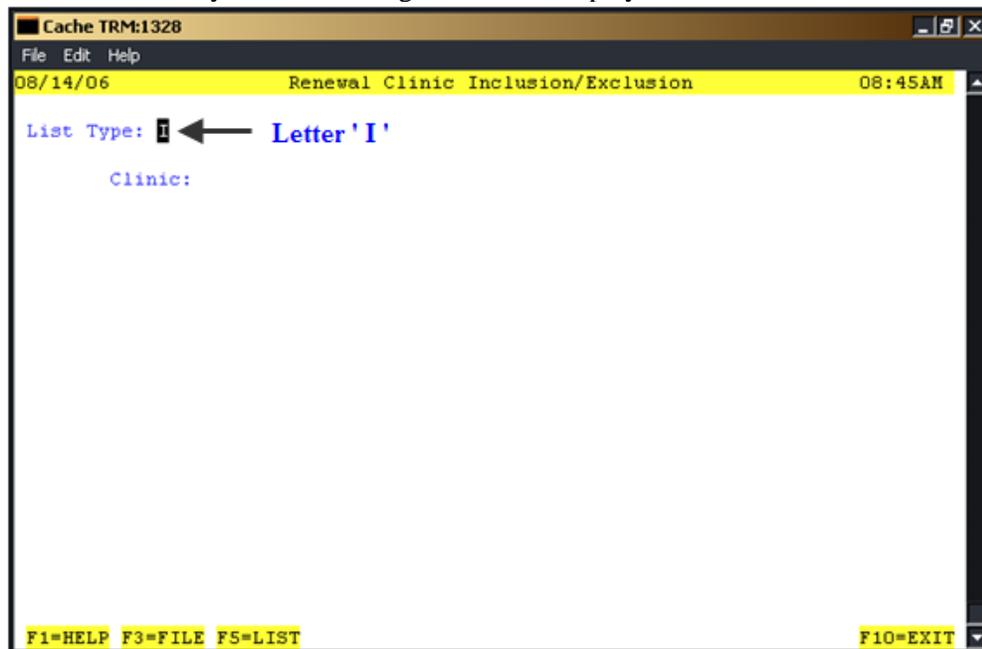
NOTE: At the time this document was composed, AudioCARE acknowledges there is a known defect with the clinic reports not refreshing after lists are modified. Use the 'F5=List' during clinic entry to view clinics contained in lists.

Select Included Clinics Report. The result will be a display listing all clinic's previously entered on the "Include" list. Print this report.

Now select Exclude Clinics Report. The result will be a display listing all clinics' previously entered on the "Exclude" list. Print this report.

The next step is to determine which of the two lists was 'in use' by your system when RENEWAL was last active. Only one of the lists can be 'in use' at any given time.

Select Clinic Entry. The following screen will display:



It is **very important** at this point to note the 'List Type' value that displays (indicated by arrow above). The value displayed indicates which list type was 'in use' by your system when RENEWAL was last active. The available list types are:

"A" to allow all clinics to process renewal prescriptions

"I" to define specific clinics to allow process renewal prescriptions

"E" to define specific clinics not allowed to process renewal prescriptions

**How these lists work:** As the AudioRENEWAL software processes the renewal request the clinic of the original prescription is checked against the 'in use' list.

Example One: Site Blue has selected list type 'I'. A renewable prescription originated in Site Blue's Clinic A. The patient calls in for a refill, there are no refills left so the renewal request is initiated. Clinic A is in the 'I' (Include) list so the renewal request processes.

Example Two: Site Blue has selected list type 'I'. A renewable prescription originated in Site Blue's Clinic B. The patient calls in for a refill, but as there are no refills left the renewal request is initiated. Clinic B is NOT in the 'I' (Include) list. The renewal is NOT allowed and the patient is given the recorded message that the clinic does not allow renewals; the patient should contact the physician.

Example Three: Site Green has selected list type 'E'. A renewable prescription originated in Site Green's Clinic C. The patient calls in for a refill, there are no refills left so the renewal request is initiated. Clinic C is in the 'E' (Exclude) list. The renewal is NOT allowed and the patient is given the recorded message that the clinic does not allow renewals; the patient should contact the physician.

Example Four: Site Green has selected list type 'E'. A renewable prescription originated in Site Green's Clinic D. The patient calls in for a refill, there are no refills left so the renewal request is initiated. Clinic D is NOT in the 'E' (Exclude) list so the renewal request processes.

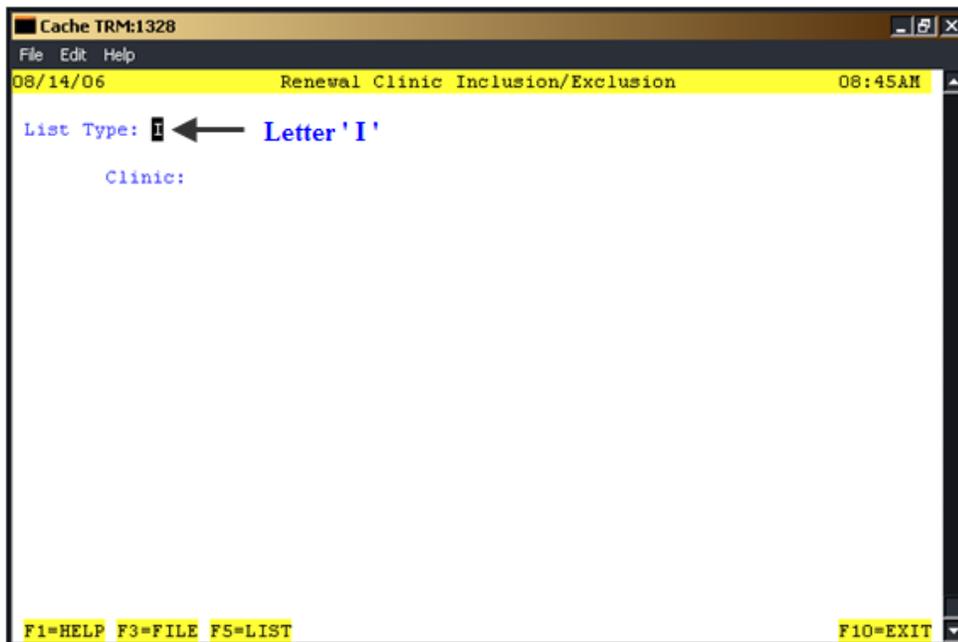
Example Five: Site Yellow has selected list type 'A'. All renewable prescriptions for all Site Yellow Clinic's process with no clinic restrictions.

**Note: Based on your review of the clinic lists, your knowledge of the clinics that are approved for the renewal process, and the current 'in use' list, determine what clinic information needs updated (add or delete clinics) on your 'in use' list. In general, the 'in use' list will be the 'shortest path' for manual clinic entry. The following examples demonstrate what is meant by the term 'shortest path'.**

Example One: A site has 500 clinics, and 400 clinics are approved for the renewal process. The 'in use' list would be the 'E' (Exclude) list and you would confirm that the 100 clinics NOT approved are on the 'E' list.

Example Two: A site has 200 clinics, and 50 clinics are approved for the renewal process. The 'in use' list would be the 'I' (Include) list and the site would confirm that the 50 approved clinics are on the 'I' list.

Example Three: In this final example, a site would like to test the re-activation of the new RENEWAL software using a limited number of clinics. They have determined that the last 'in use' List Type is 'E' (Exclude). In the future, when testing is complete, the 'shortest path' for manual clinic entry will be the 'E' list. For the testing period they select the 'I' list and add the specific clinics to be included in the test. They delete all other clinics from the "I" list (if any). They confirm that when Clinic Entry is selected the following screen displays with 'I' in the List Type.



When they select F5=List (CTRL L if using telnet) only the clinics to be included in the test phase display in the 'I' list. When the test phase ends, they will select Clinic Entry and enter 'E' so the 'in use' list changes from the 'I' Include list to the 'E' Exclude list.

## List Maintenance

**Note: Maintenance should be done only on the list type currently displayed as 'in use'. Only one List Type can be 'in use' at any given time.**

Select Clinic Entry to perform maintenance to the 'in use' list type. After selecting Clinic Entry the List Type displayed is the 'in use' list. Follow the guidelines below when making changes to your specific List Type:

### List Type "A"

No maintenance necessary. All clinics will be allowed to process renewals.

List Type "I" - Clinics entered and saved to this list will process renewals.

Include additional clinics:

- Enter the clinic IEN at the 'Clinic:' prompt and press <enter>
- If the system prompts to delete the clinic select "No" (It's already on the list)
- Repeat the steps to add more clinics
- When finished entering new clinic IENs, press Ctrl-L or F5 to display the list to verify that the list is correct.
- Press F3 to file and save the updated list
- This clinic(s) will now be able to process renewals

Remove a listed clinic:

- Enter the clinic IEN at the 'Clinic:' prompt and press <enter>
- The clinic will display
- At the 'Delete' prompt arrow to 'Y' and press <enter>
- The message "Clinic removed" will display
- Repeat the steps to remove more clinics
- Press F3 to file and save the updated list
- This clinic(s) will no longer be able to process renewals

List Type "E" - Clinics entered and saved to this list will not process renewals.

Exclude additional clinics:

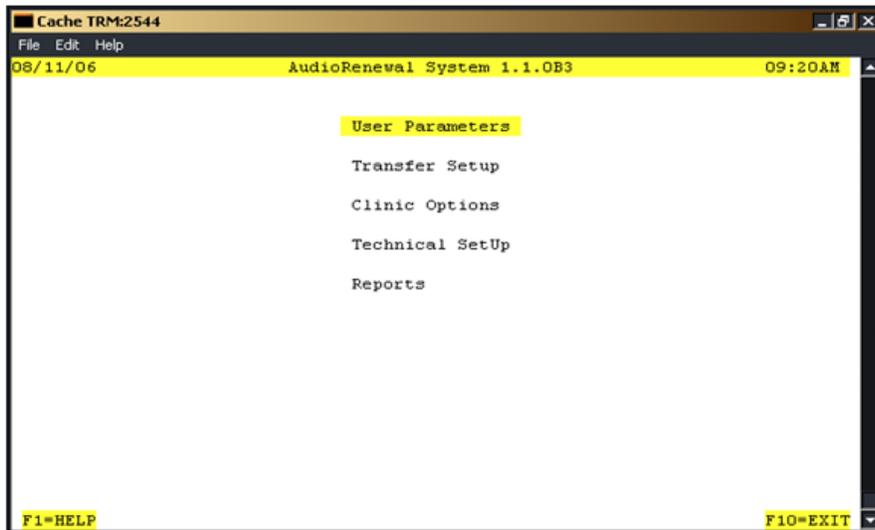
- Enter the clinic IEN at the 'Clinic:' prompt and press <enter>
- If the system prompts to delete the clinic select "No" (It's already on the list)
- Repeat the steps to exclude more clinics
- When finished entering new clinic IENs, press Ctrl-L or F5 to display the list to verify that the list is correct.
- Press F3 to file and save the updated list
- This clinic(s) will no longer be able to process renewals

Remove a listed clinic:

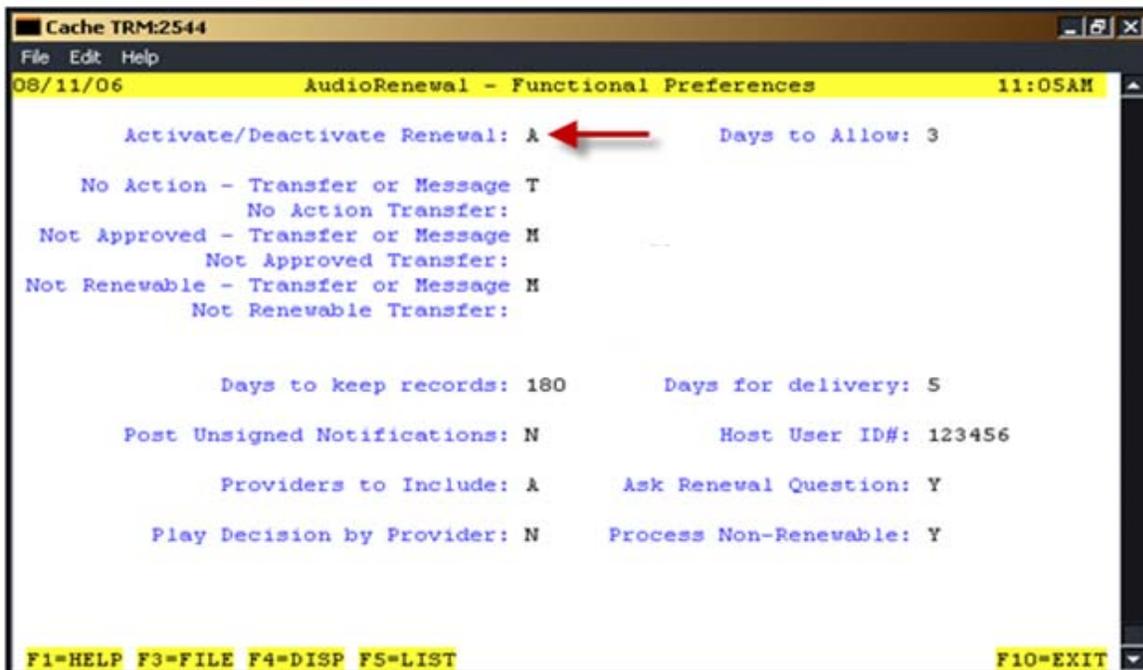
- Enter the clinic IEN at the 'Clinic:' prompt and press <enter>
- At the 'Delete' prompt arrow to 'Y' and press <enter>
- The message "Clinic removed" will display
- Repeat the steps to remove more clinics
- Press F3 to file and save the updated list
- This clinic(s) will now be able to process renewals

## Activate AudioRENEWAL

Access the AudioRENEWAL module from the AudioCARE Systems Main Menu by selecting Application Modules and then selecting AudioRENEWAL. The following screen will display:

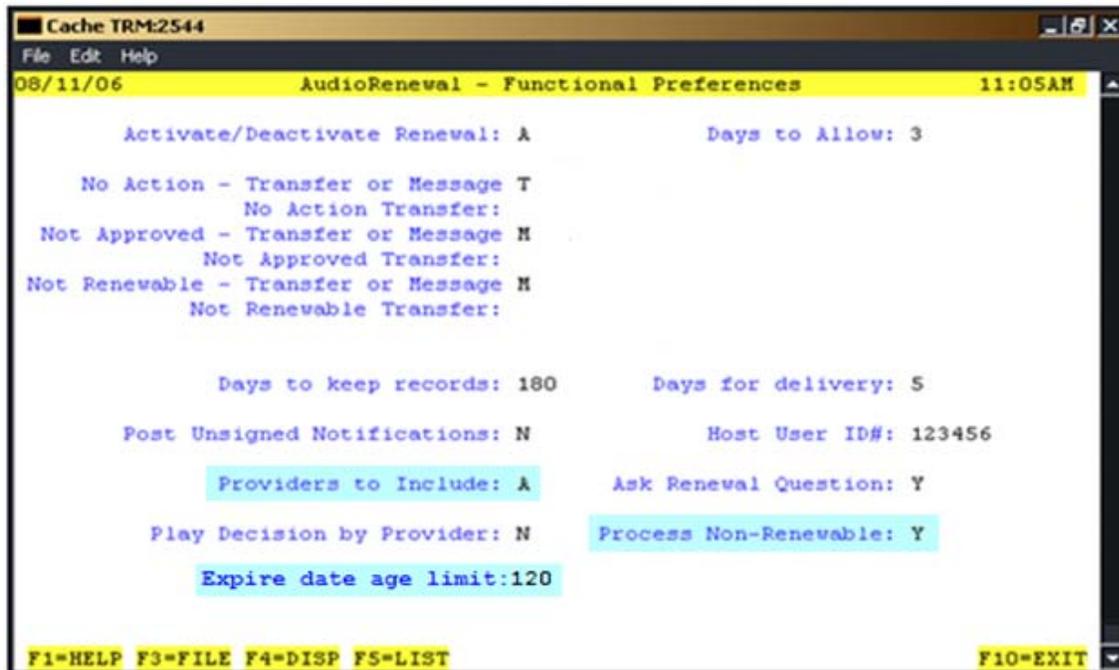


Select User Parameters. The following screen will display:



To activate AudioRENEWAL enter an "A" in the "Activate/Deactivate Renewal:" field. A "D" is entered to deactivate AudioRENEWAL.

Additional Parameters to review are highlighted on the User Parameter screen displayed below:



- Providers to Include: To limit renewals to Primary Care providers enter a 'P'. Enter 'A' to allow renewals from all providers.
- Expire date age limit: Enter the number of days to allow renewal requests for expired prescriptions (120 days maximum - VistA software caps this at 120 days).
- Process Non-Renewable: To allow non-renewable drug renewal requests to process and create the appropriate VistA MailMan message and provider notification (if enabled) enter a 'Y'. (No Renewal order is automatically created.) Enter 'N' to play a message that will inform the caller that the prescription is not renewable.

## To Change the Refill/Pharmacy Menu Message

To change the AudioREFILL menu option prompt to include “Press 4 to request a Renewal”, follow the instructions below.

#	Instructions
1.	From the AudioCARE Main Menu, Select Application Modules.
2.	From Application Modules, Select AudioREFILL.
3.	From AudioREFILL Set-up Menu, Select Voice Recordings.
4.	On the Voice Recording Screen, use the cursor to advance to the Main Option field. The text of the pharmacy menu will display across the bottom of the screen. Look to see if there is an Option 4 for Renewal. If there is an Option 4, no action needs to be taken.
5.	If there is no Option 4 – for Renewal, press the F5 key (CNTRL L if in telnet) for a list of available alternatives. AudioCARE archives the voice recordings. Look for a recording that contains all the same menu options in addition to Option 4 for Renewal. (Press the up and down arrow keys to display more recording options.) If no message contains option 4 for RENEWAL, use current message. When the caller enters the prescription number in the REFILL system, the system will verify it as eligible for RENEWAL. It will initiate the RENEWAL process and speak the appropriate message to the patient.
6.	Use the down arrow to select the voice file number and description of the menu option you wish to select. Press [Enter] to accept as the Main Option field. Please keep in mind other inbound pharmacy applications such as AudioRxINFO or the capability to transfer to the pharmacy.
7.	Press [Enter] and the [F3] function key to FILE. Press [Enter] again at the update complete prompt. The Renewal menu option should be activated.

To contact AudioCARE Customer Service for additional assistance call 1-610-296-9840 and select option #2.

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# Installation Guide

Every site is expected to install patch OR\*3\*336 (shown in the steps below), even if they are not currently using AudioCARE applications. Sites using AudioCARE applications are expected to follow the instructions in patch PSO\*7\*328 to obtain and install the updated Class III routine VEXRX.

The patch descriptions of both patches PSO\*7\*328 and OR\*3\*336 refer to this documentation.

## Pre Installation

### 1) Retrieve VEXRX routine from SHOP ALL (Sites using AudioCARE applications only)

Since routine VEXRX is not a PSO namespaced routine, it must be retrieved using SHOP,ALL on FORUM.

The following capture shows how to retrieve the updated routine using SHOP,ALL on FORUM. Note that the name of the message is "ROUTINE VEXRX FOR PATCH PSO\*7\*328", and it is located in the TELEPHONE REFILL REQUESTS basket.

```
Select Software Services Primary Menu Option: SHOP  SHOP,ALL FOURWARD
                                         =====
ISC-CHICAGO

$ set NOVER      !!!!!!! Now connected to FOURWORD      !!!!!!!

Select FORUM,FORUM at the SURROGATE NAME: // prompt to logout.

Choose from:
    PATCH,ALL          Read Privilege
    SHOP,ALL           Read Privilege
    SHARED,MAIL       Read Privilege

Select NEW PERSON NAME: SHARED,MAIL// SHOP,ALL  Read Privilege
                                         =====

VA MailMan 7.1 service for SHOP.ALL@ISC-CHICAGO.VA.GOV
(Surrogate: FORUM,FORUM)
SHOP,ALL last used MailMan: 08 Sep 09 11:49 (Surrogate: FORUM,FORUM)
SHOP,ALL's current banner: SHOPALL BULLETIN BOARD
Select message reader: Classic// <RTN>
Read mail in basket: TELEPHONE REFILL REQUESTS      (7 messages)
Last message number: 7  Messages in basket: 7
Enter ??? for help.

TELEPHONE REFILL REQUESTS Basket Message: 1// ?

TELEPHONE REFILL REQUESTS Basket, 7 messages (1-7)
*=New/!=Priority.....Subject.....From.....
1. AUDIOFAX VEXRX RTN AFTER PSO*6*141  <Name Removed@ISC-BIRM.
2. AUDIOFAX VEXRX RTN 3/15/96          <Name Removed@FORUM.VA.
3. VEXRX for Outpatient V.7            <Name Removed@ISC-BIRM.
4. VEXRX FOR OUTPATIENT 7.0 (11/26/01) <Name Removed@CPR.ISC-C
5. VEXRX FOR OUTPATIENT 7.0           <Name Removed@CPR.ISC-C
6. VEXRX FOR OUTPATIENT 7.0           <Name Removed@CPR.ISC-C
7. ROUTINE VEXRX FOR PATCH PSO*7*197  <Name Removed@LAWVAA.FO
8. ROUTINE VEXRX FOR PATCH PSO*7*328 <Name Removed@CHEY19.FO
```

At this point, select the message "ROUTINE VEXRX FOR PATCH PSO\*7\*328". In this example it is message number 8, but be sure to verify the correct message title. Then at the "message action" prompt, forward the message to your local system.

## 2) Load the Distribution for patch OR\*3\*336 from the MailMan message (All Sites)

- Choose the Packman message containing patch OR\*3\*336.
- At the 'message action' prompt type 'X' to invoke the INSTALL/CHECK MESSAGE PackMan option.
- At the 'Select PackMan function:' prompt type 'INSTALL/CHECK MESSAGE' to load the distribution.

Example:

```
Select
*New/!=Priority.....Subject.....Lines.From.....Read/Rcvd
 127. [4059580] 03/10/10 OR*3*336          1246 <"NPM  [#51710262]"@F
Search finished.
Enter message number or command: 127

Subj: OR*3*336  [#4059580]          10 Mar 2010 11:52:27 -0500 (EST) 1246 lines
From: <"NPM  [#51710262]"@FORUM.VA.GOV> In 'IN' basket.  Page 1
-----
$TXT Created by Developer,One at CHEY19.FO-BAYPINES.MED.VA.GOV (KIDS) on Wedne
sday, 03/10/10 at 11:22
=====
Run Date: MAR 10, 2010                Designation: OR*3*336
Package : OR - ORDER ENTRY/RESULTS REPORTING  Priority: Mandatory
Version : 3                            Status: Released
                                Compliance Date: <Compliance Date>
=====

Associated patches: (v)OR*3*243  <=< must be installed BEFORE `OR*3*336'

Subject: AUDIOCARE RENEWAL

Category:  ROUTINE

Description:
=====

This patch is a replacement patch for OR*3*290, which has been entered in

Enter RETURN to continue or '^' to exit: ^

Enter message action (in IN basket): Ignore// Xtract KIDS
Select PackMan function: 6  INSTALL/CHECK MESSAGE

Line 233  Message #4059580  Unloading KIDS Distribution  OR*3.0*336

Want to Continue with Load? YES//
Loading Distribution...

OR*3.0*336

Select PackMan function:
```

# Installation Procedure

## 1) Install the VEXRX routine (Sites using AudioCARE applications only)

From MailMan, load and install the Class III VEXRX routine that has been retrieved and forwarded to your local mail from SHOP ALL (see pre-installation section). Install this routine when the option Process Telephone Refills [A3A PHONE REFILLS] is not in use. Install this routine before patch OR\*3\*336.

Note: If you have already installed the updated VEXRX routine from PSO\*7\*328 before installing OR\*3\*290, then you do not need to install it again. The VEXRX routine has not changed since the release of PSO\*7\*328.

Below is the step-by-step procedure for installing routine VEXRX.

- Open the MailMan message containing the VEXRX routine.
- At the 'Message Action' prompt type 'X' to invoke the INSTALL/CHECK MESSAGE PackMan option.
- At Select PackMan function prompt enter 6 INSTALL/CHECK MESSAGE.
- At the warning message prompt enter YES.
- At the Preserve routines on disk prompt enter YES.
- At the 'Subject' prompt type 'PSO\*7\*328 Backup'
- Send to your local mailbox.
- At 'And send to' prompt, press enter.
- The routine is now installed.

Example:

```
Select PackMan function: 6  INSTALL/CHECK MESSAGE

Warning:  Installing this message will cause a permanent update of globals
and routines.
Do you really want to do this? NO// YES

Routines are the only parts that are backed up.  NO other parts
are backed up, not even globals.  You may use the 'Summarize Message'
option of PackMan to see what parts the message contains.
Those parts that are not routines should be backed up separately
if they need to be preserved.

Shall I preserve the routines on disk in a separate back-up message? YES//

Subject: PSO*7*328 BACKUP
Send mail to: // (ADD YOUR NAME HERE)
Select basket to send to: IN//
And Send to:
Building PackMan backup message with subject PSO*7*328 BACKUP
```

## 2) Install patch OR\*3\*336 (All Sites)

Before installing patch OR\*3\*336, consult with the Pharmacy staff to determine the appropriate person to coordinate the membership for the mail group used in the auto renewal process.

Below is the step-by-step procedure for installing patch OR\*3\*336.

This patch can be installed with users on the system. Installation will take less than 5 minutes.

Suggested time to install: non-peak requirement hours.

This installation does not change the functionality of CPRS or Outpatient Pharmacy applications.

ENVIRONMENT CHECK: OR\*3\*336 contains an environment check that looks for the renewal version of VEXRX that was being used when the problem was reported in January 2009. If the January 2009 renewal version of VEXRX is found, the installation of OR\*3\*336 aborts. If this occurs retrieve and install the correct VEXRX routine, then use the 'Restart Install of Package(s)' option to complete the OR\*3\*336 patch installation. For sites not using AudioCARE refill or renewal, the pre-environment checks will be skipped if the Class III VEXRX routine is not in the system.

- 1) Choose the PackMan message containing this patch and invoke the INSTALL/CHECK MESSAGE PackMan option.

NOTE: If patch OR\*3\*290 was not installed routines ORAREN and ORY290 will not exist before installing OR\*3\*336. If you have installed patch OR\*3\*290, which has now been marked entered in error, the "before" checksums for ORAREN and ORY290 will match the "before" checksum in the Routine Information section of this patch, OR\*3\*336. Both routines have been modified by this patch and the "after" checksum should match what is provided in this patch description. Do not uninstall patch OR\*3\*290.

- 2) From the Kernel Installation & Distribution System menu, select the Installation menu.
- 3) From this menu, you may select to use the following options (when prompted for INSTALL NAME, enter OR\*3.0\*336):
  - Backup a Transport Global - this option will create a backup message of any routines exported with the patch. It will NOT backup any other changes such as DDs or templates.
  - Compare Transport Global to Current System - this option will allow you to view all changes that will be made when the patch is installed. It compares all components of the patch (routines, DDs, templates, etc.).
  - Verify Checksums in Transport Global - this option will ensure the integrity of the routines that are in the transport global.
- 4) Use the Install Package(s) option and select the package OR\*3.0\*336.
- 5) When prompted "Enter the Coordinator for Mail Group 'AUTORENEWAL', answer with the name of the person who will be responsible for assigning the users who will be monitoring/receiving messages about automatic renewal requests.
- 6) When prompted "Want KIDS to INHIBIT LOGONs during the install? NO//", respond NO.

- 7) When prompted "Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//", respond NO.

**IMPORTANT NOTE: If you are NOT using the AudioRENEWAL Module, your installation is complete.**

Install Example:

```
Select Installation Option: 6 Install Package(s)
Select INSTALL NAME: OR*3.0*336      Loaded from Distribution
3/29/10@15:11:52
=> OR*3*336

This Distribution was loaded on Mar 29, 2010@15:11:52 with header of
OR*3*336 It consisted of the following Install(s):
OR*3.0*336
Checking Install for Package OR*3.0*336

Install Questions for OR*3.0*336

Incoming Files:

100.9 OE/RR NOTIFICATIONS (including data)
Note: You already have the 'OE/RR NOTIFICATIONS' File.
I will OVERWRITE your data with mine.

Incoming Mail Groups:

Enter the Coordinator for Mail Group 'AUTORENEWAL': PHARMACYPERSON,ONE
LAH
192 OI&T STAFF

Want KIDS to INHIBIT LOGONS during the install? NO//
Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//

Enter the Device you want to print the Install messages.
You can queue the install by enter a 'Q' at the device prompt.
Enter a '^' to abort the install.

DEVICE: HOME// <RETURN>

Install Started for OR*3.0*336 :
Mar 29, 2010@15:16:18

Build Distribution Date: Mar 29, 2010

Installing Routines:
Mar 29, 2010@15:16:18

Running Pre-Install Routine: PRE^ORY290

Installing Data Dictionaries:
Mar 29, 2010@15:16:18

Installing Data:
Mar 29, 2010@15:16:18

Installing PACKAGE COMPONENTS:
OR*3.0*336

Installing MAIL GROUP

Installing PARAMETER DEFINITION
Mar 29, 2010@15:16:18
```

```
Running Post-Install Routine: POST^ORY290

Updating Routine file...

Updating KIDS files...

OR*3.0*336 Installed.
      Mar 29, 2010@15:16:18

-----

100%  [ 25 50 75 ]
Complete

Install Completed
```

## Post Installation

This section is only for sites using the AudioRENEWAL Module. The purpose of this section is to provide information for consideration after routine VEXRX and patch OR\*3\*336 are installed. IRM, Pharmacy, and Providers should work together to monitor renewal activity.

Refer to the Release Notes section of this document for additional information about these items.

- 1) Assign members to the AUTORENEWAL mail group using option MAIL GROUP COORDINATOR'S EDIT.
- 2) If necessary, set up the proxy user in the NEW PERSON (#200) file for filing renewal requests. Sites may already have USER,AUDIOCARE PHONE set up for renewals. No menu options, person classes, or keys need to be added to this user.
- 3) Edit parameter OR AUTORENEWAL USER and enter the proxy user defined in step #2.
- 4) Review the settings for the notification OP RX RENEWAL REQUEST very closely and determine the settings which are most appropriate for your usage of AudioRENEWAL. Do not edit the exported package level parameter settings.
- 5) Enable the notification OP RX RENEWAL REQUEST using option Enable/Disable Notifications.
- 6) Update AudioRENEWAL Clinic list on the AudioCARE server.
- 7) Re-Activate the AudioRENEWAL functionality on the AudioCARE server.
- 8) Notify providers, pharmacy, and nurses that AudioRENEWAL has been reactivated and who to contact for problems.

After running the option to process refills/renewals:

- 9) Confirm that the AUTORENEWAL Mail Group is receiving messages when appropriate.
- 10) Confirm that the View Alerts and Notifications are occurring as expected for non-renewable drugs and signature requests.
- 11) Verify the Refill Count report (MailMan message).

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